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CRIS User Manual

In the following sections you find instructions, tips and help on the main functions and areas of CRIS - the current research information system of the University of Münster.

In the section [Introduction CRIS](#) you will find background information on CRIS itself: It merges research activities and results of the University of Münster into one information hub. Following the motto "maintained once, used multiple times", this information hub serves e.g. the main reporting tasks of the University of Münster. Selected information also finds its way into the [central research portal](#) and can be integrated into the university's own websites.

In addition, CRIS is used to create curricula vitae (CV), publication lists, project lists and other reports. The CRIS data are used as a basis for university internal discussions on issues like cross-institutional strategic planning. How exactly to enter and manage these elements in CRIS is explained in the section [Using CRIS](#).



Das Forschungsinformationssystem
der Universität Münster

Content

[Expand all](#) [Collapse all](#)

Introduction CRIS

CRIS (formerly known as CRIS.WWU) is the current research information system of the University of Münster. It gathers information on research activities and results of the University of Münster in a single information base. Following the principle "maintained once, used many times", CRIS serves both as a tool for communicating research activities to the outside world as for handling all reporting requirements internally and externally. Time-consuming multiple data collections should be avoided as far as possible. The scientists themselves should check, complete and continuously update the contents of CRIS. This way, they are enabled to fulfil [internal reporting](#) obligations.

The regular reporting on research is required by law for all universities in North Rhine-Westphalia. Structured data on research, however, is also important for other purposes - like internal university discussions on cross-institutional strategic planning or for external assessments. One way of communicating University of Münster's research activities to the interested publics is via the [university's research portal](#) connected to CRIS.

In order to showcase excellent research results, it is necessary for the University of Münster:

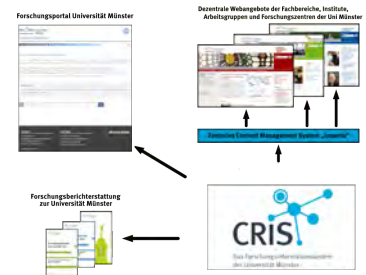
- to recognise its own research competencies,
- to promote research focuses,
- and to present research results and competences appropriately.

CRIS supports this broad catalogue of requirements. Frequently requested data is collected decentralised in CRIS and can be accessed centralised at any time. The effort for researchers is to be kept low - for example, by avoiding multiple data collections and processing data in a way that allows its use for as many purposes as possible, e.g. on the institution's website.

CRIS's tasks are supported and complemented by other instrument of the University of Münster, e.g.:

- Repositories and archives for publications: CRIS cannot hold or offer full texts. This is done by the [ULB and its platforms such as MIAMI](#). The ULB also advises on topics such as Open Access
- Research databases and [research data repositories](#): Often confused with current research information systems, research databases are digital archives for data generated during the research process. Here, [the University of Münster offers separate initiatives](#) such as the Datastore

The University of Münster research report is generated on basis of CRIS's content. The presentation of research results in CRIS is therefore a record of the publicly funded scientific activities. This way, CRIS serves as an information base on research activities at the University of Münster for university management, deaneries and the research department.



Development of CRIS

CRIS.WWU became CRIS

Due to the new name of the University of Münster, the research information system of the University of Münster was renamed to CRIS in October 2023. Platform and services remain the same.

Technical status of CRIS

CRIS (formerly known as CRIS.WWU) is the current research information system of the University of Münster since 2010. It gathers information on research activities and results of the University of Münster. CRIS serves both as a tool for communicating research activities to the outside world as for handling all reporting requirements internally and externally.

In May 2022 CRIS was updated to a new version of the underlying Converis software. This process will be continued with further update steps.

Through the 2022 update, far-reaching system changes could be implemented. These lead to various improvements, e.g.:

- Stability and speed of everyday operations are increased
- Editing masks and operating logic are optimized
- Content management systems (like Imperia) at the University of Münster benefit from a faster data interface

With the next major update in 2023, CRIS will receive the latest system updates. This will also provide the basis for future changes:

- Improved contrasts as a step towards accessibility
 - Checking for existing content with the same title directly on entry
 - Optimisation of already known problems, e.g. when content is saved without a related card
 - Improvement of general system stability
 - Technical basis for import routines still to be tested as well as active e-mail notification in case of changes
-

Old versus new CRIS as of April 2022

All information collected in CRIS over the first 12 years were transferred in 2022 to the new system, so that you as a researcher at the University of Münster could continue with your data maintenance. The University of Münster's websites that fetch content from CRIS are also served reliably.

Of course, with such numerous changes, there are also points that require your attention. Especially where the system logic changed, assumptions had to be made for the best possible data transfer. With these assumptions, old data categories were e.g. transferred to new ones. Therefore, when you log in to the new CRIS, please check your content for the following points:

- **New mandatory fields:** To improve the overall data quality, new mandatory fields are introduced - e.g. for publications, [projects](#), [distinctions](#) and [CV milestones](#). If these fields were previously "empty", you may experience display problems. If you notice that e.g. your professorship offers are not displayed correctly in your CRIS internal profile, check the corresponding entries and save possible corrections
- **New relations:** For improved evaluations, text fields are replaced by so-called relations. For example, [an award you received](#) or the [publisher of a publication](#) are no longer noted solely as text, but a link to an additional price or publisher list has to be created. In some cases, this new relation could not be created automatically in the course of the update
- **New publication types:** With the update of CRIS, the [publication types](#) were also revised. This takes into account the requirements of [the KDSF standard](#). In addition, the experiences with previous publication types were analysed for this. Please check [the new publication types](#) for your entries. If the automatically assigned, new category is not applicable, you can of course correct it
- **New project types:** Especially for [externally funded projects](#), new categories had to be introduced. If you find that the new category does not apply to your externally funded project, please contact the CRIS team via cris@uni-muenster.de
- **New visibility logic:** For data protection and security reasons the logic behind [status and visibility](#) was changed to a two-step-process. Because of this, new personal profile are e.g. no longer publicly visible by default, but have to be made publicly visible

If you notice any other discrepancies in your data, please contact the CRIS team via cris@uni-muenster.de. Please describe which information are incorrect or what you would expect instead.

The new research portal of the University of Münster

One way of communicating research activities of the University of Münster to the interested publics is via the [University of Münster's research portal](#) connected to CRIS. The research portal includes:

- Profiles of the individual persons and institutions connected to the University of Münster
- Research activities and results such as publications, projects, talks, distinctions, doctorates and habilitations with participation of the University of Münster
- Links between persons and institutions at the University of Münster and their varied research activities and results

With the update of CRIS, the research portal will also be fundamentally revised and re-constructed. First, presentation and speed will be improved. Next, the research portal will successively offer additional functions, e.g. new search options

The Ps

The magical "P" form the content core of CRIS:

- **Persons:** Researchers of the University of Münster with their respective affiliations to the University of Münster's institutions, contact details and their scientific career, their involvement in international networks and scientific bodies as well as further information
- **Publications:** Publications by University of Münster researchers - regardless of whether these were produced before or during their time at University of Münster. This includes monographs, articles in journals and conference proceedings, encyclopaedia articles, reviews, e-papers, posters etc.
- **Projects:** Refers to both externally funded projects and projects that are financed from the institute's own budget. General research focuses of persons or institutions are not included here
- **Prizes and distinctions:** Distinctions and prizes awarded to University of Münster researchers. Prizes given by the University of Münster to external researchers are not included here
- **Post-graduations & habilitations:** Doctoral and post-doctoral procedures supervised by University of Münster researchers - regardless of the form or whether this took place before or during the time at University of Münster
- **Patents:** Patent applications and patents developed by the University of Münster researchers. This rubric is still under construction



CRIS is intended to include all of the over 7,000 employees from all 15 University of Münster faculties with their research activities and results - from student assistants to professors.

The structure of CRIS is wide-ranging with the various "P". Contents are not considered isolated from each other, but are set in relation to each other. This takes into account the requirements of the various research disciplines. This integrative and cross-disciplinary collection allows the highlighting of connections between interdisciplinary research activities.

Research reporting generated from CRIS is aimed at various addressees:

- University of Münster research reports are generated from the contents of CRIS
- Reviewers can inform themselves about topics and search for missing information
- Young academics are given the opportunity to plan their studies according to where their field of interest is excellently represented
- Deans' offices and rectorate are kept up-to-date with the scientific affairs in their departments
- Stakeholders inside and outside the University of Münster, such as academics, companies and the general public, can inform themselves about research activities at the University of Münster

CRIS is designed to be flexibly expanded to include further content such as partnerships and cooperations. The system is constantly refined. We are looking forward to information and suggestions from the various disciplines and departments. Contact us: cris@uni-muenster.de.

Quality assurance

In general

In order to fulfil its task

- as a communication tool for research activities to the outside world
- for handling all reporting requirements internally and externally

the data collected in CRIS must be valid. Therefore, the data, which are mainly entered and maintained by users, are subject to quality assurance measures,

Guidelines for quality assurance of research information in CRIS

In order to ensure the validity of the data in CRIS and to make it accessible for evaluations, structural plans, reports and analyses beyond the mere presentation in a central research portal, the "**Quality Guidelines for CRIS**" working group has developed guidelines for the collection and ongoing quality assurance of research activities and results. This includes topics like which types of content should be recorded with which characteristics, and also specify from an organisational perspective how the process of data collection and quality assurance is to be designed.

Hereby, the quality guidelines are primarily addressed to the University of Münster researchers who document their research activities in CRIS. Furthermore, the guidelines address the central offices for editorial support and technical development of CRIS (e.g. Department 6.4, ULB, International Office), which implement these guidelines.

Another part of this are the **affiliation guidelines**, aiming to increase the visibility of the University of Münster and its researchers and to improve the university's international reputation. <https://www.uni-muenster.de/Publizieren/en/service/affiliation/index.html>



Implementation of quality guidelines

These quality guidelines represent the formal framework for data maintenance. Quality assurance is achieved through a multi-stage process:

- At the level of individual records: Here, validation of the records is ensured by different University of Münster institutions. For example, the ULB will subsequently check publications
- At the level of individual users: The quality of the entries can be improved through training and support. This way misunderstandings are prevented that otherwise could lead to incorrect entries, duplicates and operating errors
- At the level of individual University of Münster organisations: A coordinating role within CRIS ensures that data maintenance is bundled on institutional level. For example, all publications and CVs of an organisation can be managed by one person. This way profiles offer a satisfactory level of information. Furthermore new information on CRIS is forwarded within the organisation and an additional training level is provided
- At the CRIS level itself: On the one hand, data is regularly checked and cleaned, e.g. to reduce existing duplicates or half-finished entries. On the other hand, CRIS itself is constantly improved - together with the users. For example, ideas and wishes are collected and the CRIS team determines how to realise these ideas within the system
- At the level of information sources: In addition to data input by users, CRIS obtains data (partly automatically) from other systems. These data sources are checked for reliability and trustworthiness. Interfaces to external data providers are supplemented and constantly improved

Legal basis

Evaluation Regulations of the University of Münster

With the adoption of the "[Evaluationsordnung der Westfälischen Wilhelms-Universität Münster vom 25. November 2009](#)" the senate created a legal basis for the operation of the current research information system (referred to as the "Forschungsdatenbank"). It says in § 1 Abs. 4:

"(4) Zur Unterstützung der Evaluation in der Forschung unterhält die Westfälische Wilhelms-Universität eine Forschungsdatenbank. In sie werden die für die Evaluation der Forschung relevanten Daten eingestellt, insbesondere Forschungsberichte, Publikationslisten, sowie Daten zu Drittmitteln, Preisen und Auszeichnungen. Die beteiligten Mitglieder und Einrichtungen der Westfälischen Wilhelms-Universität sind verpflichtet, sich an der Erhebung der Daten zu beteiligen."

Higher Education Act (Hochschulgesetz - HZG) of the State of North Rhine-Westphalia

The comprehensive presentation and communication of research activities and results is a necessary, legally required tasks for the University of Münster. This legal requirement is stated in [§ 70 Abs. 3 und 4 HZG NRW Verordnung über den Betrieb von Forschungsinformationssystemen](#). It says:

"(3) Die Ergebnisse von Forschungsvorhaben sollen in absehbarer Zeit nach Durchführung des Vorhabens veröffentlicht werden. Bei der Veröffentlichung von Forschungsergebnissen ist jede oder jeder, die oder der einen eigenen wissenschaftlichen oder wesentlichen sonstigen Beitrag geleistet hat, als Mitautorin oder Mitautor oder Mitarbeiterin oder Mitarbeiter zu nennen. Ihr oder sein Beitrag ist zu kennzeichnen."

"(4) Die Hochschule berichtet in regelmäßigen Zeitabständen über ihre Forschungsvorhaben und Forschungsschwerpunkte. Die Mitglieder der Hochschule sind verpflichtet, bei der Erstellung des Berichts mitzuwirken."

With regard to transparency in research, especially when externally / publicly funded, [§ 71a HZG NRW](#) also states:

"(1) Das Rektorat informiert die Öffentlichkeit in geeigneter Weise über abgeschlossene Forschungsvorhaben nach § 71 Absatz 1."

According to [§ 8 Abs. 3 HZG NRW](#), the University of Münster can decide and organise itself how to achieve this:

"(3) Die Hochschulen können für sich selbst oder übergreifend im Verbund mit weiteren Hochschulen und außeruniversitären Forschungseinrichtungen Forschungsinformationssysteme aufbauen und betreiben. Sie können zu diesem Zweck auch personenbezogene Daten verarbeiten. Das Nähere regelt das Ministerium durch Rechtsverordnung."

Control of legal data protection requirements

Due to the handling of personal data, a preliminary control by the officially appointed data protection officer is necessary for the operation. For this purpose, a register of processing information was developed in which the origin and transfer of data as well as the security concept are explained. The data protection officer approved of the register of processing information.

CRIS Team

CRIS as current research information system of the University of Münster is maintained and supervised by Department 6.4: Research information management.

Department 6.4 - Research information management
Administrative department 6 - Research Affairs
Domplatz 6-7, Rooms 302-305
Intranet: uni-muenster.de/intern/forschung/cris/
Research portal: cris.uni-muenster.de/portal

If you have any questions, suggestions or comments, please do not hesitate to contact the following persons via the central CRIS support cris@uni-muenster.de.

Dr. Sebastian Herwig

Main responsibilities:

- Departmental management
 - Basic matters of researching reporting
 - Representation of research reporting interests in University-wide projects and committees
 - Planning and steering the further development of research reporting and CRIS
 - Processing requests for data and evaluations
 - Updating the overviews of research activities on the central University of Münster website
 - Representation of research reporting interests in external bodies (including the [state initiative CRIS.NRW](#), the [Commission for Research Information in Germany \(KFiD\)](#), [DINI AG Research Information Systems](#), [euroCRIS](#))
-

Dr. Ulrike Gausmann

Main responsibilities:

- Professional and conceptual development of the research reporting system and data collection structures
 - Implementation of the [RDC standards for research information](#) in Germany at the University of Münster
 - Processing requests for data and evaluations
 - Recording and maintaining data on externally funded projects
 - Quality assurance of various CRIS content
 - Quality assurance of publication lists for DFG joint proposals
-

Christian Grugel

Main responsibilities:

- Technical specification, development and operation of [interfaces for the provision of data from CRIS](#)
 - Technical specification, development and operation of the [University of Münster Research Portal](#)
-

David Sillmen

Main responsibilities:

- Technical administration and operation of CRIS
 - Technical development of CRIS
 - Technical specification, development and maintenance of interfaces for importing data to CRIS (e.g. data on University staff and organisational units)
-

Luca Wolf

Main responsibilities:

- Support for users of CRIS
 - Development and maintenance of documentation and instructions
 - Development and implementation of CRIS-related training seminars
 - Technical development of CRIS
 - Recording and/or importing central databases (e.g.: third-party funded projects)
 - Drafting recurrent reports (e.g. on award ceremonies for Senate and Board of Governors)
 - Quality assurance of various CRIS content
-

Using CRIS

In the following sections you will find a compilation of instructions, tips and help on the main functions and rubrics of CRIS.

If you have any further questions, suggestions or comments, the [CRIS team](#) will be happy to assist you. Feel free to direct your request to the central CRIS support: cris@uni-muenster.de.

Content

- [Log in to CRIS](#): How to find and log in
 - [Functions and menus](#): General information on the system and its usage
 - [Your settings](#): Language, Use delegation etc.
 - [Searching and filtering](#): How to search and filter content
 - [Side note: Managing duplicates](#) How to prevent and manage duplicate entries
 - [Status and Visibility](#): What is a status? What is visibility? And way is that important?
 - [List views](#): List views are the rubrics' central presentation of content
 - [Export records](#); How to export records and define this export
 - [Inbox and notifications](#): *What to expect in future*
 - [Side Note: Thematic classification](#): *Further information on classification systems used in CRIS*
 - [Persons and Organisations](#): Persons and organisations related to the University of Münster
 - [Your personal profile](#): Information in a persons, their cards, CV and web profile
 - [Side note: CRIS Card](#): *What is the CRIS card? And why is this important?*
 - [Side note: ORCID iD](#): *What is the ORCID iD? How do I manage my ORCID iD in the Uni's IT portal?*
 - [User delegation](#): Delegate editing rights to another person
 - [Coordination for an organisation](#): Managing CRIS data for an organisation of the University of Münster
 - [Coordination for Joint Projects](#): Managing data for a joint project hosted at the University of Münster
 - [Publications](#): How to manage publications in CRIS
 - [Types of publication](#): What are the different types of publication in CRIS?
 - [Manual publication management](#): Managing publication data in the editing mask
 - [Import from an online source](#): Import e.g. from Scopus or PubMed
 - [Import from a file](#): Import from a file from e.g. Citavi
 - [FAQ for managing publications](#): Publication FAQ
 - [Side note: Claiming to be an author](#): *Claiming to be added as an author of a publication*
 - [Side note: Publication cloning](#): *Copying publications and re-use of entries*
 - [Projects](#): How to manage projects in CRIS
 - [Project basics](#): What are the different types of project and how are they managed?
 - [FAQ for managing projects](#): Project FAQ
 - [Manage Own resources project](#): Adding and managing projects funded with own resources
 - [Manage projects carried out outside Uni Muenster](#): Adding and managing projects carried out outside the University of Münster
 - [Manage Externally funded projects](#): Managing projects funded by external parties
 - [Talks](#): How to manage talks in CRIS
 - [Distinctions](#): Manage distinctions, honours or awards
 - [Basics of distinctions and prizes](#): Basic information on distinctions and awards in CRIS
 - [Managing distinctions](#): Manage distinctions, honours or awards you received
 - [Doctoral examination procedure](#): How to manage doctoral examination procedures in CRIS
 - [Habilitation procedure](#): How to manage habilitation procedures in CRIS
 - [Imperia, websites and CRIS](#): How to connect CRIS to CMS tools like Imperia and manage website content
 - [Websites of FB04 and CRIS](#): How to connect CRIS to CMS of the FB04 / School of business and economics
 - [CRIS FAQ](#): General CRIS FAQ
 - [Some CRIS terms](#): Terms used in CRIS
 - [Keyboard shortcuts in CRIS](#): List of access keys to use in CRIS
-

Log in to CRIS

Almost every person working at the University of Münster (UM) has an automatically generated CRIS account. Here they can create a personal profile (CV, publications, projects, etc.) in CRIS and add new content on an ongoing basis. To do this, you just need an active CRIS account:

- A CRIS account is automatically generated for staff of the University of Münster (UM) and also for most FB05 employees working at the Münster University Hospital (UKM). Your CRIS profile will be initialised with master data from UM / UKM personnel systems
- If a person does not have a CRIS account (e.g. visiting academics / researchers, scholarship holders), please contact us via mail cris@uni-muenster.de and tell us your UNI/ZIV ID as well as your position at which university organisation. We will set up an account for you. Please note: You need to log in first to activate your account!

To log in you will need your University ID (also known as Uni or WWU or ZIV ID or UM user) and the associated password. You can log in via one of the following ways:

- Using "CRIS-Login" in the footer of the research portal (see image on the right for details) cris.uni-muenster.de/portal
- Using the general CRIS URL cris.uni-muenster.de
- Using the direct SSO link sso.uni-muenster.de/converis

The system will check if you are already connected to the university's SSO area (SSO = single sign-on). Your University ID allows direct access to several, protected online areas for the University of Münster).

If you are already in an active SSO session, the log in URLs will forward you directly to your CRIS start page (see below). This may take a moment as all kind of security parameters are checked in the background.

If you need to log into the SSO area of the University of Münster first, you will be forwarded to the SSO Login. Please enter your University ID and your University password.




After logging in you will see the start page / dashboard. From here you can access your [personal profile](#) by clicking on the pencil symbol next to your name.

Via the left menu bar you can jump directly to the different rubrics like publications. And get an overview of content related to you or your institution.

New entries can be created e.g. by clicking the button "Add new" in the upper right corner.

In some cases - e.g. after being idle and logged off by the system - you may see an alternative login mask. Please click on the link "Mit persönlicher Uni-Kennung anmelden" / "Login with individual University ID".

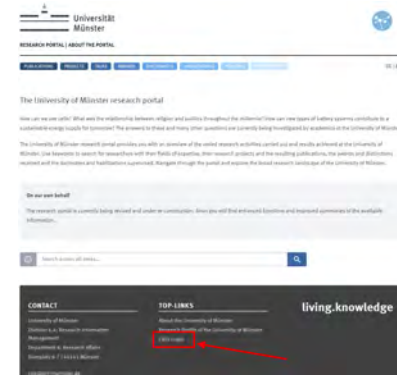
You will now be forwarded either to your start page or to the SSO Login (see above).

If you see another mask like  or  or , please go back one page in your browser. Or use the general CRIS URL cris.uni-muenster.de instead to get back into your SSO session (see above).

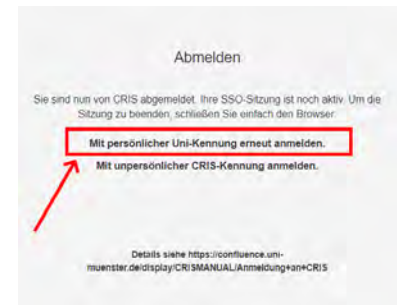
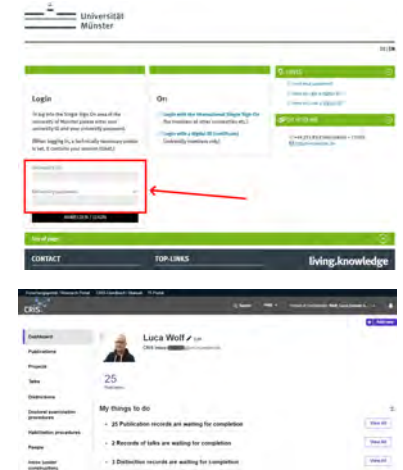
(Only the CRIS admin team and other admin users have CRIS-internal accounts. You can ignore this log in option.)

Tipp: Use the CRIS login page as the start page or add it to the home screen in your browser. This way you can access your data at once and check for new changes.

Please note: After being idle for more than 15 minutes, you will be logged out automatically due to security reasons. If this happens, please just log in again.



In the research portal, you can find "CRIS-Login" in the black footer under Top-Links



Functions and menus

In many menus, CRIS follows the same operating logic. Here we explain basic functions and menus that you will encounter over and over again.

Content

- [Basic structure](#)
 - [Navigation bar on the left](#)
 - [Add new content in upper right corner](#)
- [Additional support](#)
 - [Finding the manual](#)
 - [Help texts when editing data](#)
- [Saving entries](#)
- [Known pitfalls in CRIS](#)

More information on menus are in the following chapters:

Content

- [Searching and filtering](#)
- [Status and Visibility](#)
- [List views](#)

Basic structure

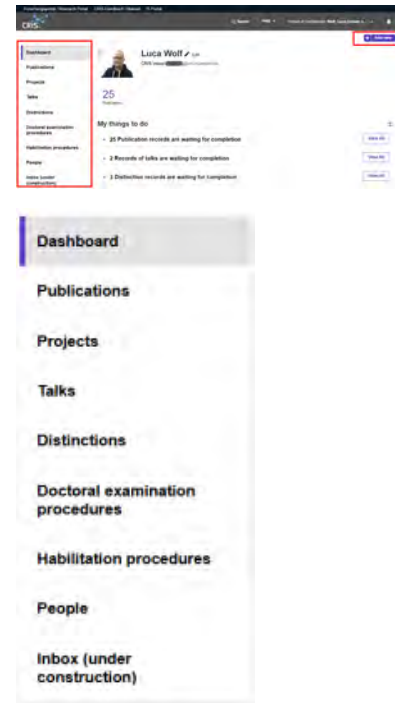
When you log in to CRIS, you will see the start page / dashboard.

From here you can access your profile, pending tasks or work on your data entries.

You also see here several elements you will find again elsewhere in the system:

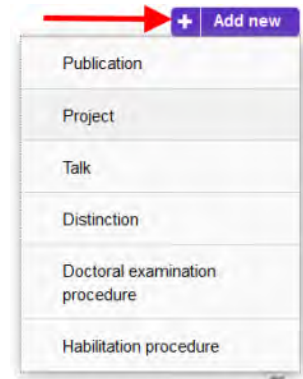
Navigation bar on the left

Each rubric in CRIS can be accessed via the main navigation bar on the left side. This bar is always visible so that you can jump from one page directly to another rubric. This way you can jump from working on [your personal data](#) to your [publications](#). The rubric you are currently in is highlighted with an orange marker. In this example we are on the dashboard:



Add new content in upper right corner

On the start page and on all list pages of the rubrics you find the button "Add new" in the upper right corner. Clicking on it opens a menu bar. Here you can choose which new content you want to add, e.g. a new [own resources project](#):



Tip: Use the CRIS log in page as the start page or add it to the home screen in your browser. This way you can access your data at once and check for new changes.

Please note: After being idle for more than 15 minutes, you will be logged out automatically due to security reasons. If this happens, please just [log in](#) again.

Additional support

CRIS offers support in different places and forms:

Finding the manual

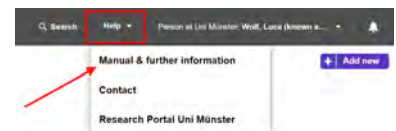
As well in the black header



as in the help sub-menu you find links to this manual. So, if you forgot to save the address of the CRIS manual - don't worry.

Here you can also find links to the [research portal](#), which automatically publishes all (externally visible) CRIS data:

- Profiles of the individual persons and institutions of the University of Münster
- Research activities and results such as publications, projects, talks, distinctions, doctorates and habilitations with participation of the University of Münster
- Links between persons and institutions of the University of Münster and their varied research activities and results

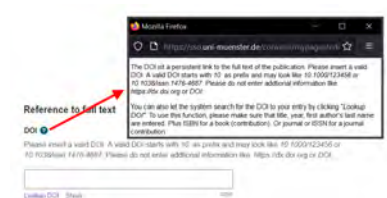


Help texts when editing data

When working in the editing masks (the example on the right is from the [publication mask](#)), you find help texts

1. located next to some of the data fields
2. as additional pop up messages, which you open by clicking on the blue question mark symbol next to the attribute's name

Here you find additional details like mandatory fields based on status, background information oder how to answer this field.



In some menus as in [your settings](#), you find help texts by hovering with your mouse over the question mark symbol.

! If you hover your mouse on any other page over the question mark, you will see gibberish text



We are aware of this bug and looking for a solution.

Saving entries

When working on a data entry, e.g. a publication, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:

Cancel

Quick save

End of input

- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- The button "End of input" triggers a data validation which checks if all mandatory fields are filled. You also define the status of this entry and leave the mask afterwards

Known pitfalls in CRIS

Unfortunately every system has its weaknesses - CRIS is no exception. Known pitfalls are:

- Using browser functions like "back" or "refresh" may cause display errors. We recommend using CRIS's own functions - for example, click "Cancel" or choose a rubric from the left navigation bar to exit a data entry mask without saving
- Using multiple tabs for CRIS in one browser is not possible. CRIS is only working properly if it is used in one single browser tab / window. Parallel usage in multiple browser tabs will cause display errors - even information loss if trying to save information in different tabs. If it is necessary to work in different windows, please use CRIS in two different browsers (e.g. Firefox and Chrome). A parallel log in with two different browsers is possible. We recommend to use only one of these two browsers (e.g. only Firefox) for saving data while the other one (e.g. Chrome) is only used for searching and reading entries. This way you will not overwrite your own fresh changes
- Data entry masks and views do not refresh as expected. It often helps to exit a mask - e.g. jumping from the publication list view via the left navigation bar to projects and back again. "Quick saving" while working on an entry will also trigger a page refresh. Finally logging off and back again as well as clearing the browser cache may help

Your settings

Here you can manage different settings like the on-screen language:

Content

- [Log in and find your settings](#)
- [Notification settings](#)
- [Language settings](#)
- [Order of your user roles](#)
- [User delegation](#)

Log in and find your settings

Please [log in to CRIS](#). In the corner in the upper right you will see your name (**Person at Uni Münster: Your name**). Click on your name and a drop-down-menu will appear. Please choose "My settings".

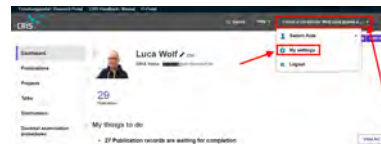


Image 1: Dashboard after logging in to CRIS

Notification settings

The notifications are still under construction. But later on you will be able to choose here of you want to receive notifications in the system's own CRIS inbox or also to your default University email address. You can find more details on this [in the Inbox-chapter](#).

Language settings

The content / on-screen language can be German or English - which means all set menus and functions in CRIS are either in German or English. Please choose your preferred language here and click "Save". Afterwards you need to log off and on again to activate the new language setting.

i Even if the content language is English, German is still the leading system language. Multi-language input fields like publication title therefore need to be answered both in English and German as only the German entry will trigger the mandatory input.

Order of your user roles

In CRIS you always have the rights to your own data - which is your CRIS role as a person. In addition you may have additional rights to the data of colleagues via an [user delegation](#) or even to an [organisation of the university via a coordination role](#). Here in the settings you can change the order in which these roles are presented to you in the menu. Just click on one of the rules, and drag the role to the place in which you would like to see it and then drop it there by releasing the mouse button. Remember to "save" the new order.

i The role on top of the list is the default role you are in as soon as you log in to CRIS. Thus as soon as you log in, you see all CRIS data available to this specific role, e.g. the data of the organisation you are coordinating. You can of course always slip into any of your other roles.

User delegation

Here you can delegate the editorial rights to your content to another person. Details can be found in the chapter "[User delegation](#)".



Image 2: My settings

Searching and filtering

To find certain data entries in CRIS, you can search for these entries and / or filter list views based on certain attributes. Especially when working on [duplicates](#) or [missing relations](#), these functions are important.

Content

- [Global Search](#)
- [Filtering list views](#)



Note: Search first, add later

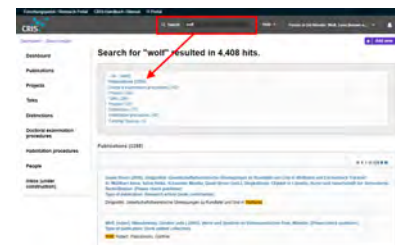
Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers of the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the global search to check all entries visible within CRIS and look for e.g. a certain publication title.

Global Search

In the dark grey top bar left to "Help" you find the Global Search. Using the Global Search, you can look for any term in all entries which are at least visible within CRIS. This way you can also find entries which are not (yet) related to you - e.g. other persons, publications, projects located at the University of Münster. This Global Search is very important for finding [unrelated entries](#) before adding new data.


Click on the magnifying glass to open a text field. Here you enter the term you want to search for. Press "Enter". The Search will collect data from e.g. publication titles, project titles, names of persons or organisations.

All hits are presented in a browsable list. You can also narrow down the hits using the displayed categories.



Filtering list views

Data entries in each rubric are presented in a [list view](#). Here you can see your own entries and those related to you (or to your [organisation if you are in a coordinating role](#)). You can filter these lists based on different attributes:

- Click on the blue icon "Filter list"  in die tool bar
- In the new menu under the tool bar you can define your filter parameters via e.g. drop-down menus and text fields
 - Dropdown 1 on the far left: The different elements you may define a filter for. In this example we use "Publication" and the attributes of publications. You might as well choose "Journal" related to "Publication" and e.g. the journals' attributes
 - Dropdown 2 (2nd from the left): Here you select the specific attribute for which you want to define a filter. In this example an attribute of "Publication"
 - Dropdown 3 (3rd from the left): Here you define a filter option, which differs depending on the type of the attribute. For example: For a text field, you can use "contains", for a number field "greater than" or "between", for a choice field "equals"
 - Dropdown or field 4 on the far right: Last but not least what exactly you want to filter for. Depending on the attribute you use for filtering it may be a text, a number or a choice answer
- *In the example on the right, the filter parameters in the first row are "Publication" (1), "original title of the publication" (2) "contains" (3) the text "CRIS" (4)*
- Right next to dropdown / field 4 you can add another row of filter parameters by clicking on the plus symbol
 - By clicking on minus you delete a row of filter parameters
- This new row of filter parameters is connected to the row above via conditions AND or OR (see the dropdown left to the different parameter options)
 - AND will reduce the number of hits as both sets of filter parameters have to be true (e.g. part of the title AND type of publication)
 - OR will expand the number of hits as either one of the parameter sets may be true (e.g. part of the title OR type of publication)
 - You can use both conditions to connect multiple rows of filter parameters. Each condition will map the row above to the row below and so on
- *In the example on the right the second row looks for "Publication" (1) "Type of publication" (2) "equals" (3) the choice value "Research articles (journal)" (4). It is connected to the first row by an AND - thus the filter is looking for publications that are journal articles with "CRIS" in their title*
- The button "Apply" activates the filter and the list below will show the results matching your filter parameters



- You can close the filter menu now using "Close", the active filter parameters will stay activated -

this is indicated by the yellow filter icon



- When you want to deactivate the filter, click on the yellow icon "Filter list". The filter menu will open again. Clicking "Reset" will deactivate the filter, the filter icon turns blue again
- With the option "Save filter" you can name your filter parameters and save this filter definition for re-use. "Restore filter" allows you to select a saved filter definition and loads it into the filter menu

Applying a filter will reduce the list of entries to the ones matching the filter definition. You can use these results with all available list functions like sort, select or export. You can also page through the results of the list.

The filter function is especially useful when [working with duplicates](#).

Side note: Managing duplicates

It may happen that an entry exists more than once - e.g. because two authors have each created an entry for a joint publication or because an already existing publication is imported again. Or you create a project as an own resource project because you were not aware that an entry already exists for an externally funded project. Such a double entry is referred to by the system as a duplicate.

Duplicates are not always immediately recognisable: You only see the entries in CRIS that are related to you via your [cards](#). If an entry already exists done by a colleague or you have not yet been related to an externally funded project as a project member, then you cannot see at first glance whether if your new entry already exists in CRIS. Therefore, please pay special attention to how duplicates can be avoided.

The following functions are available for most entries, such as own resource projects, talks or doctoral procedures. We will use mainly publications as an example because they offers an additional step due to the import function.

Content

- [Avoid duplicates when adding new data](#)
 - [Search first, add later](#)
 - [Pay attention to warnings when adding new data](#)
 - [You are already connected to a potential duplicate:](#)
 - [You are not connected to the potential duplicate:](#)
- [Merge duplicates via list view](#)
- [Managing duplicates while importing publications](#)
 - [Case 1: The publication to be imported is already in CRIS and already connected to you](#)
 - [Case 2: There differences between the publication to be imported and one already in the system](#)
- [FAQ on duplicates](#)

Avoid duplicates when adding new data

Search first, add later

Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers of the University of Münster authored one publication. In your personal CRIS account you will only see the data entries which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications connected to you via your [cards](#). But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title.

If there is an entry you contributed to, please ask for being related to this entry instead of adding a duplicate entry - either by using the [claiming](#) function for publications or simply asking your colleagues. As soon as you are related to this existing entry, you can find it in your [list views](#) and manage its information,

Pay attention to warnings when adding new data

When adding new entries (except for distinctions), the system checks whether there is already an entry in this rubric with the same title (which is at least visible within CRIS). This title must already exist in exactly this spelling so that the system can recognise it and report it as a duplicate - e.g. if you copy and paste entries from other sources into the CRIS input masks.

When you add a new entry - in our case a new publication - and go from the title field to a new field (e.g. to the year of publication), CRIS will check in the background whether there is already a CRIS-visible entry with this exact title.

If there is an entry with this title, the title field is coloured red and a corresponding message appears, suggesting there might be a duplicate entry.

i Please note: For bilingual input fields, e.g. for talks, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates

Please click on the violet link "View duplicates".

Depending on whether you are already related to a potential duplicate e.g. as author, the next steps differ:

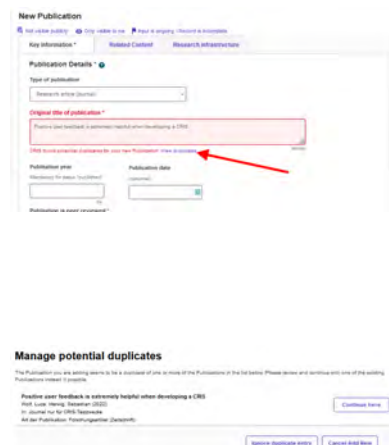
You are already connected to a potential duplicate:

Please click on "Continue here" and confirm the next message with "Continue". The new entry will be deleted.

The system will now redirect you to your already existing entry. Here you can check and change the existing information.

You are not connected to the potential duplicate:

For publications you are not connected to as an author / editor you see "Claim" next to the potential duplicate.

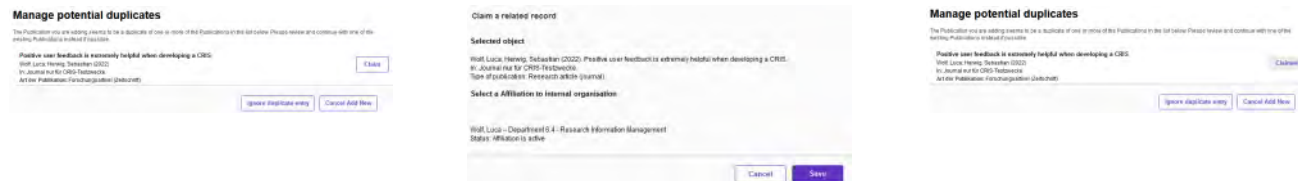


Clicking on it will generate a request to be added as an author / editor of this publication. This request is sent to responsible persons like the CRIS team.

After this request was sent, the potential duplicate is marked as "Claimed".

By clicking "Cancel Add New" you will leave the entry mask for the new publication and can continue working on other data until you are added to the claimed publication.

Of course, you can skip the claiming request altogether and ask e.g. your colleague (who authored this publication with you) to relate you to this publication..



For other data types without a claiming system - in the example a talk - you will see the button "Request access" next to a potential duplicate

When you click this button, you will see a mask for writing a message. Here you can explain why you need access to this specific entry. The message will be sent to the CRIS team.

By clicking "Cancel Add New" you will leave the entry mask for the new entry and can continue working on other data until you have access to the requested entry.

Of course, you can skip the request altogether and ask e.g. your colleague (who gave the talk with you) to relate you to this entry..



The mask for managing potential duplicates also offers the options:

- "Ignore duplicate entry" returns you to the data mask you were working in so that you can finalise the entry you started with
- "Cancel Add new" will cancel both the duplication management and the new data entry

Merge duplicates via list view

When you find duplicate entries in your own data, you can merge these entries to one. You can find the function for this in the [list view's toolbar](#) for the specific rubric.

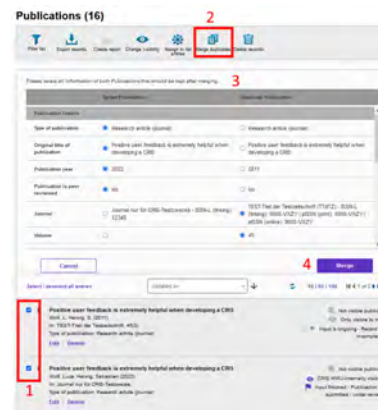
You need to check for yourself if your information like a publication are already available in CRIS. Especially when importing publications it may happen that duplicates are not recognised correctly. Some requirements need to be met to recognise a duplicate:

- Entries have to be of the same type (e.g. both publications "Text book (monograph)" or "Research article "journal")

To compare entries and merge them if necessary, you select at least two entries from the list. Of course you can [filter](#) the list before the merging step:

- In the tool bar above the publications' list view, select the funnel symbol for "Filter list". In the second drop-down for this example, select the attribute "Original title of publication" and enter the title of the duplicate entries. Activate the filter under "Apply". The filter symbol is now yellow and indicates that the filter is active
- Now it is easier to merge your publications:

1. In this example two publications with the same title are selected
2. Next choose the icon "Merge duplicates" (the icon looks like two leaves of paper)
3. Both selected publications are now presented in a table next to each other, comparing their attributes. Per attribute you can select if you want to keep the value from the target / remaining publication on the left or the value from the duplicate publication on the right
4. After defining your selection, you merge both entries into one using the button "Merge".



Managing duplicates while importing publications

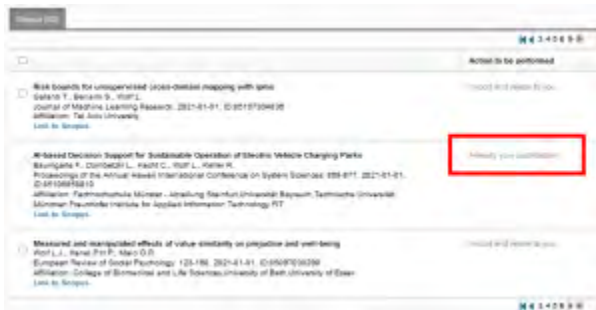
When you import publication from a [file](#) or an [online source](#), CRIS will check during the import process if a publication is already in the system, based on title, import sources and related authors of the University of Münster.

- Please note: Publication in CRIS need to be at least visible within CRIS so that CRIS can check for possible duplicates.

Normally CRIS is able to recognise a duplicate during the import process (if all requirements are fulfilled) and will guide you through the necessary steps - which are similar for both import options:

Case 1: The publication to be imported is already in CRIS and already connected to you

This publication is already in CRIS - e.g. imported from the same or another online source. The publication is also already connected to you via one of your [cards](#). Therefore the column on the right states "Already your publication". This publication will be ignored for the import.



Case 2: There differences between the publication to be imported and one already in the system

CRIS found a publication entry in the system that is similar to one found in the import. It marks this entry als possible duplicate and needs you to check manually.

- The column on the right states "Possible duplicate - Needs validation". Please mark this publication. For online imports, please click on "Validate". For file imports, you can directly click on the text link in the column "Action to be performed" (see next step).



- If the text in the column "Action to be performed" is coloured and "click-able", please click on this text link "Possible duplicate - Needs validation"



- Another window will appear. Here you see the publication already in CRIS and the one to be imported. You can select which of these entries you either want to keep or want to import. Click "Confirm" after selecting and CRIS will return to the import menu



- The right column will now show the selection you made per possible duplicate:
 - *Possible duplicate - User decided to import as new:* You decided to import the new publication as a new entry, no matter if it may be a duplicate
 - *Identified duplicate - Create author relation to you:* This publication is already in CRIS, but you are not related to it as an e.g. author. Thus CRIS will keep the already existing entry and just add you as author
 - *Identified duplicate - Already your publication:* You decided to skip this publication as the one already in CRIS is your publication. This publication will be ignored for the further import process

- In the import menu you can now check all possible duplicates one after the other
 - After working through all possible duplicates, make sure that all entries you either want to import or decided a de-duplication action for are marked
 - Finally click on "Confirm" to start the process
-

FAQ on duplicates

Are duplicates identified and managed either during the general quality control or ULB validation?

The CRIS team quality controls new entries (not just publication). If duplicates are found during this general process, they are merged to one entry.

Also, the ULB will validate publication in status "Publication is published" in the future. During this validation process, duplicates will be dealt with if they are recognised. But as the ULB will work through all publication data in CRIS successively, this process will take time. Therefore we recommend that you keep an eye on your publications and possible duplicates before publishing a data entry.

Is it possible to merge more than two duplicates in one step?

No, CRIS can only merge two duplicates in one step. But if you filtered for multiple entries with e.g. the same title, you can repeat the merge procedure one by one as you will return to the filtered list after each merging.

When do I have to check for duplicates?

We recommend to search for possible duplicates before entering a new e.g. talk. Best search for e.g. parts of the title using the [global search](#). Apart from that it is up to you when you want to manage possible duplicates.

If I do not manage my duplicates: Will they remain in CRIS? On which status?

If either the CRIS team or the ULB find duplicate entries, they will merge them to one valid entry. Apart from that, duplicates will remain in the system on the status and the visibility assigned to them. This means that they might be visible as double entries in your public research profile or your publication list.

If there are possible duplicates during a publication import and I log out: Is the list of not validated import entries still available on my return?

No, the import lists are only temporary and will be deleted once you log out. If you have a long list of publications to import and are unsure how many duplicates you may find, we recommend to split the long import to several smaller ones e.g. based on publication year. This way you can finish one small package at a time and do not risk losing "all data" before you are finished.

Status and Visibility

Two central functions in CRIS are the status and the visibility of an entry. You will come across corresponding settings over and over again during editing.

Content

- [Status values of entries](#)
 - [Status of persons](#)
 - [Status of projects](#)
 - [Status of publications](#)
- [Visibility of entries](#)
 - [Peculiarities when dealing with visibility](#)
- [Visibility for personal profiles](#)

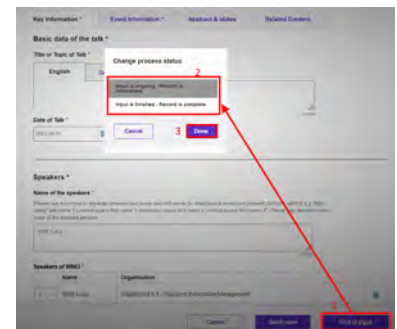
Status values of entries

Each entry passes through different statuses during editing, which fulfil different tasks. In list views, for example, you can [filter on the status](#) and thus manage your entries.

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this. Otherwise you will return to the list view of the rubric. On the right you see status selection options for an own resource project.

Which statuses are available in this selection window depends on the rubric, user rights and previous status of the entry. We will explain the most important status values for persons, publications and projects below. The logic for using status values is always the same, even if there are differences in details like the name or the order of the status values.

When changing a status a validation is triggered which tests if certain, for this status mandatory fields are answered. Mandatory field are marked in various ways - e.g. by an asterisk * or a note (either always displayed or only visible when the mouse is hovering over the field name). They must be answered before status changes are accepted by the system. During a status change, these mandatory fields are checked and you will receive a message, if and where information are still missing.



Status of persons

When you click "End of input" while working on your [personal profile](#) you will see only one status - "Person is active". There are no further selection options, you can only confirm this status by clicking "Done". The reason for this is that your CRIS account was defined automatically and all mandatory fields were answered during this step. Your personal profile is therefore ready for use.

Exception: If you are in a [coordinating role](#) you may see the status "Person is in transition period" as an option. For this person, additional information on their contract were available from the University of Münster's personnel system.

Status of projects

[Own resources projects](#) or [projects carried out outside the University of Münster](#) pass through three status steps:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Own resources / external project is entered:** After gathering all necessary information and wanting to make the project visible (within CRIS and / or to the public) you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Project is finished:** When / after the project is finished, you have to change the status to the final step. In this "finished" status editing your project is no longer possible (but the CRIS team may edit the entry on your behalf). You can not change the status back to the step before. In our [research portal](#) or on your institute's website the project is flagged as "finished"

[Externally funded projects](#) follow a similar process:

- **Input is ongoing - Record is incomplete:** In most cases projects, which are funded by external parties, are prepared by the CRIS team based on the information they receive from the "Drittmittel-Abteilung". If possible they already answered all mandatory fields, so that your externally funded project awaits you on the second status step. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **External funded project is entered:** After the CRIS team prepared this project entry for you and moved it to this status, you can still work on the details and add information - e.g. project summary, keywords and relating Uni Münster persons working in your project team. You can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site

- **Project is finished:** When / after the project is finished, you have to change the status to the final step. In this "finished" status editing your project is no longer possible (but the CRIS team may edit the entry on your behalf). You can not change the status back to the step before. In our [research portal](#) or on your institute's website the project is flagged as "finished"

Status of publications

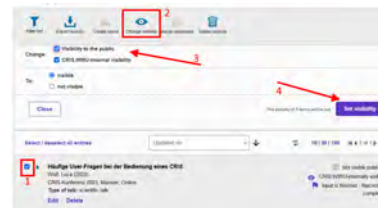
The statuses of publications may vary, depending on the [type of publication](#). In this example we inspect the statuses of a scientific article in journal:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries - no matter if added manually or imported. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Input finished - Publication is submitted / under review:** When you submitted your article which is now under review and not published yet, you need to choose this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is accepted / in press (not published yet):** If you want to indicate that your publication was accepted but is not officially published yet, this is the status to choose. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is published (ready for validation by ULB):** Please choose this status if your publication has been published / is available to the public. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. A publication in this status is automatically visible. Also, this status is a signal to the ULB that this entry is ready for additional validation
- **Validation by the ULB:** ULB staff will control all formal criteria of a valid publication and check e.g. if there are duplicates of this entry in the system. The validation does not change the visibility of the record for e.g. the [research portal](#). Its main purpose is assuring a high quality of all entries. The following status values are controlled by the ULB:
 - **Under validation by ULB:** A ULB staff member is assessing the information for this publication. From now on you can no longer edit this publication's details
 - **Under validation - Inquiry from ULB:** The ULB staff member needs further information from you. You have temporary editing rights to add the inquired details, e.g. for correcting a spelling mistake in the title
 - **Publication is validated - Publication process is finished:** Validation by ULB is finished

Visibility of entries

The visibility of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore on the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on



The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. If, for example, you have entered four new talks in CRIS and you want to make three of them publicly visible, you do not have to go back to each individual editing mask, but can edit their visibility at once in the list view. ⚠️ To do this, all mandatory fields for each talk have to be answered. For talks, this is indicated by the status "Input is finished - Record is complete". The example on the right shows how to change a talk's visibility:

- Select the talk for which you want to change the visibility by checking the box in front of the record. If you want to select multiple talks, you can do this accordingly (see 1)
- Now click on the "eye" icon in the tool bar (see 2)
- A new menu for configuring the visibility opens (see 3)
 - Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
 - To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility" (see 4)
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way



The setting for this talks will change from within CRIS as well as to the internet. This talk is now visible

Please note that an entry may only be publicly visible if it is internally visible:

- If an entry should be visible on both levels, you need to change both levels together:
 - Change both visibility levels to "not visible" at the same time
 - Change both visibility levels to "visible" at the same time

ⓘ After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Peculiarities when dealing with visibility

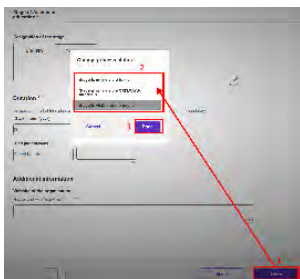
Managing visibility sometimes needs to be restricted - for example:

- Active personal profiles are by default CRIS internally visible (the public visibility can be set in addition)
- From status "Input finished - Publication is published" on, a publication is by default always publicly and internally visible
- If a publication in this status is publicly visible, it cannot be changed back to publicly "invisible"
- Finished projects are by default always publicly and internally visible

Visibility for personal profiles

When working on your [personal profile](#) you can add specific aspects to your CV - for example your research focus, academic education or professional career. For each of this aspects you can add / edit individual "milestones" as separate entries. Each of these CV entries has its own visibility setting, so that even when your personal profile is publicly visible you can decide for each CV entry if it should be visible within the personal profile or not - giving you maximum control of your own data. But as an exception compared to the rest of the system, you set the visibility of these CV entries in the same step as the status of each entry:

- **Visibility of a CV entry:** [After adding and editing a new entry to your CV](#), you click "Done" in the lower right corner of the mask. The status selection menu appears - and here you set status and visibility with a single click. By default a new CV entry is "[...] visible to the public", which means that this CV entry is publicly visible as soon as the personal profile is publicly visible in the [research portal](#) or on your institute's website. If you do not want to show this CV entry in your (publicly visible) profile, change the status / visibility to "[...] only visible to me" or "[...] only visible CRIS internally". Now this CV entry is hidden from the public while your profile is still visible e.g. in the research portal



- **Visibility of the personal profile:** Your [personal profile](#) as a whole has a status and a separate visibility - same as e.g. publications. When you log in to CRIS for the first time, your (by default active) personal profile will not be publicly visible because of data protection reasons. If you want to change this, you set the public visibility via the options available in the list view for People (normally, you can only see yourself here). If you allow public visibility, your profile is published in the [research portal](#) and your data is available to tools like Imperia, which manage data for your institute's website. The individual CV entries, which are public visible, will also now be visible "to the internet".
 - Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but its connection to you is no longer visible
 - Active personal profiles are by default always visible within CRIS

List views

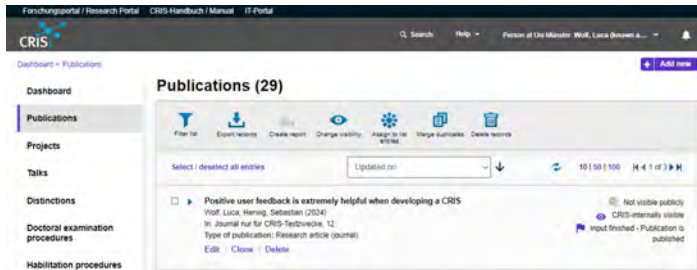
In each rubric's starting page the individual entries are presented in form of a list - e.g. all publications. This list is called a list view.

Content

- [General functions](#)
- [Special functions](#)
 - [Filter list](#)
 - [Export records](#)
 - [Change visibility](#)
 - [Assign to list entries](#)
 - [Merge duplicates](#)
 - [Delete records](#)

General functions



When jumping to a rubric's list view, you see your own content as individual entries (if you have a [coordinating role for a organisation of the University of Münster](#), you see all entries for this organisation, related by [cards](#)). Above the list view, in white font on a medium grey background, the number in brackets indicates the number of elements visible to you. In our example you see "Publications (29)", meaning this list view shows 29 publications.



You can open and edit each of these entries:

- Click on the title of the entry and you see a summary of the entry's main information. For a publication e.g. information like title, authors, journal and abstract
- Click on "Edit" below the title and the editing mask will open. Here you can edit the details of this publication
- Click on "Delete" below the title and this data entry will be archived. You will no longer have access to it, but the CRIS team still has access and can restore archived inputs
- On the right side of each row you see additional information on status and visibility. For more details see below

Of course you can also change the presentation of the entries in this list view:

- "Select / deselect all entries"
 - With this you select all entries on this list view page (or deselect all marked entries)
 - If you want to select all entries on two list view pages, you select "all" on page 1, jump to page 2 and select again "all". The selection will stay active when jumping through the list's pages
 - If you want to select single entries, just check the box in front of this entry
 - If you want to deselect a single entry from a "selected" page, just uncheck the box in front of this single entry. The selection of all other entries on this page will remain
- Using the down-down-menu in the middle you can sort the list's entries
 - Here you have the choice between ascending (arrow points downwards) or descending (arrow points upwards) sorting via the vertical arrow next to the selection
 - You can sort by the date of change ("updated on"), a short description with the core data of the entry (corresponds to what you see in the editing mask at the very top in the headline), the status and, e.g. for publications, by the year of publication
 - All available data entries on all list's pages will be sorted accordingly
- Using the counterrotated arrows  you refresh the list view
- Clicking the digits **10 | 50 | 100** defines the number of rows presented per list's page
 - Per default 10 elements per page are displayed
- The arrows  allow you to skip through the pages
 - You see how many pages this list has and which one you are on (e.g. "1 of 2" means you see page 1 of 2 pages)
 - The 94px number of pages changes when changing the number of elements per page

Special functions


Above the list there is also a tool bar with additional functions. These functions may vary from rubric to rubric or depending on your rights:


- To use one of these functions you need to select at least one entry from the list
- Each function opens an additional menu where you specify what you want to do

We will explain the most important functions from left to right.

Filter list

You can [filter](#) the list based on different attributes:

- Click on the blue icon "Filter list"  in die tool bar
- In the new menu under the tool bar you can define your filter parameters via e.g. drop-down menus and text fields
 - Dropdown 1 on the far left: The different elements you may define a filter for. In this example we use "Publication" and the attributes of publications. You might as well choose "Journal" related to "Publication" and e.g. the journals' attributes
 - Dropdown 2 (2nd from the left): Here you select the specific attribute for which you want to define a filter. In this example an attribute of "Publication"
 - Dropdown 3 (3rd from the left): Here you define a filter option, which differs depending on the type of the attribute. For example: For a text field, you can use "contains", for a number field "greater than" or "between", for a choice field "equals"
 - Dropdown or field 4 on the far right: Last but not least what exactly you want to filter for. Depending on the attribute you use for filtering it may be a text, a number or a choice answer
- *In the example on the right, the filter parameters in the first row are "Publication" (1), "original title of the publication" (2) "contains" (3) the text "CRIS" (4)*
- Right next to dropdown / field 4 you can add another row of filter parameters by clicking on the plus symbol
 - By clicking on minus you delete a row of filter parameters
- This new row of filter parameters is connected to the row above via conditions AND or OR (see the dropdown left to the different parameter options)
 - AND will reduce the number of hits as both sets of filter parameters have to be true (e. g. part of the title AND type of publication)
 - OR will expand the number of hits as either one of the parameter sets may be true (e. g. part of the title OR type of publication)
 - You can use both conditions to connect multiple rows of filter parameters. Each condition will map the row above to the row below and so on
- *In the example on the right the second row looks for "Publication" (1) "Type of publication" (2) "equals" (3) the choice value "Research articles (journal)" (4). It is connected to the first row by an AND - thus the filter is looking for publications that are journal articles with "CRIS" in their title*
- The button "Apply" activates the filter and the list below will show the results matching your filter parameters
- You can close the filter menu now using "Close", the active filter parameters will stay activated -


this is indicated by the yellow filter icon 

- When you want to deactivate the filter, click on the yellow icon "Filter list". The filter menu will open again. Clicking "Reset" will deactivate the filter, the filter icon turns blue again
- With the option "Save filter" you can name your filter parameters and save this filter definition for re-use. "Restore filter" allows you to select a saved filter definition and loads it into the filter menu

Applying a filter will reduce the list of entries to the ones matching the filter definition. You can use these results with all available list functions like sort, select or export. You can also page through the results of the list.

The filter function is especially useful when [working with duplicates](#).

Export records

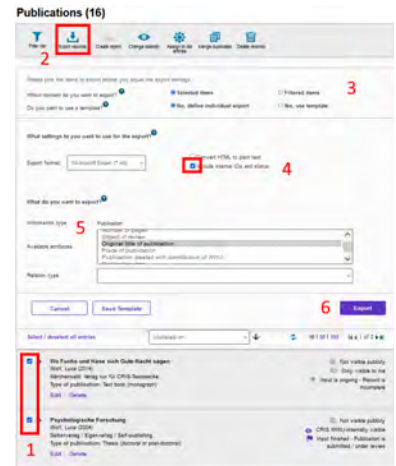
For more details on exports, please check [this chapter](#). For starters: Using the second icon  allows you to export all / selected entries from the list - e.g. to an Excel file:

After you have marked the entries to be exported (see 1), select the second icon from the toolbar to "Export records" (the symbol shows an arrow pointing downwards - see 2). Clicking on the icon, opens a new menu where you can define your export:

- Which content you want to export (selected or filtered - see 3)
- An export template you defined before (see 3)
- Which settings you want to use for the export (see 4) like
 - file format of the export file (Excel, BibTex, EndNote)
 - converting HTML to plain text
 - including internal IDs and status of the exported data (internal IDs like publication ID are very useful when combining different Excel exports using SVERWEIS / VLOOKUP)
- When exporting to Excel you can specify which attributes you want to include:



- Available attributes: These attributes belong to the list's rubric - e.g. publications - and are always available for a rubric's data entries. In the example we included original title, type and authors of the publications to export (see 5)
 - To select individual elements for export, hold down the CTRL key (Windows) / CMD key (iOS) while selecting the individual elements with the mouse and scrolling through the list
 - To mark all items for export, hold down the SHIFT key (both Windows and iOS), select the first item in the list with the mouse, scroll to the end of the list and select the last item in the list
- Related attributes: Every data object is related to other data objects - for example a publication is related to the journal it was published in. You define these relations actively in the editing mask of a publication, using the white-plus-on-blue icons. Of course you can export the attributes of this related content, too. Therefore you choose from the dropdown menu which related object you want to include, selecting their available attributes in a second step



Clicking on the violet button "Export" will start the export as defined (see 6).

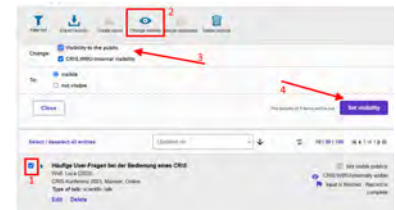
Via "Save Template" you can save this Excel export definition and re-use it again later.

The button "Cancel" will close the export menu and cancel the export process.


Change visibility

The **visibility** of an entry affects two different levels:

- Visibility to the public:** The entry is visible in the research portal and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in set menu for relating one item to another. This way you can e.g. relate a colleague's publication with a project you both work on



The visibility of an entry is not controlled via the editing mask of the individual entry, but in the list view of the entry's rubric. If, for example, you have entered four new talks in CRIS and you want to make three of them publicly visible, you do not have to go back to each individual editing mask, but can edit their visibility at once in the list view. ⚠️ To do this, all mandatory fields for each talk have to be answered. For talks, this is indicated by the status "Input is finished - Record is complete". In the example we change a talk's visibility:

- Select the talk for which you want to change the visibility by checking the box in front of the record. If you want to select multiple talks, you can do this accordingly (see 1)
- Now click on the "eye" icon  in the tool bar (see 2)
- A new menu for configuring the visibility opens (see 3)
 - Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
 - To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility" (see 4)
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way



The setting for this talks will change from within CRIS as well as the internet. This talk is now visible

Assign to list entries

This function assigns multiple entries to another information object - for example assigning several freshly imported publications to the card of one of the authors. To use this function you must be able to see the information of multiple persons - for example when you are in the [coordinating role for an organisation](#).


Merge duplicates

You need to check for yourself if your information like a publication are already available in CRIS. Especially when importing publications it may happen that duplicates are not recognised correctly. Different requirements need to be met to recognise a duplicate:

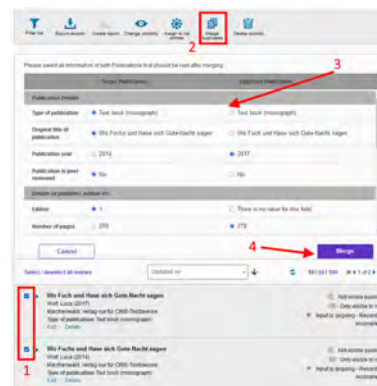
- Entries have to be of the same type (e.g. both publications "Text book (monograph)")

To compare entries and merge them if necessary, you select at least two entries from the list. Of course you can filter the list before this step.

- In this example two publications with the same title are selected

- Next choose the icon "Merge duplicates"  (the icon looks like two leaves of paper)

- Both selected publications are now presented in a table next to each other, comparing their attributes. Per attribute you can select if you want to keep the value from the target / remaining publication on the left or the value from the duplicate publication on the right
- After defining your selection, you merge both entries into one using the button "Merge".



Delete records



Delete records


After selecting at least one entry from the list, you can delete / archive the selected items using the dustbin icon. You will no longer have access to them, but the CRIS team still has access and can restore archived data up to 4 weeks.

Export records

The old reporting function in CRIS is no longer available as of June 2023. Currently, the provisional export function described here is available, which will be expanded in the course of future updates:

Your data can be selected for export via the [list view](#) of each rubric. Exports are possible in various formats - Excel, BibTex and Endnote.

To export, click on the category in the left bar - in our example, publications. In the tool bar above the list, you can now export the (filtered or selected)

list elements via the second symbol  from the left.

In the export menu (see below in the screenshots), you can define the export in more details:

- Which data is to be exported: You can select individual entries in the list (see the blue checked box in front of the entry) or determine a selection via a [filter](#) (the yellow filter symbol indicates an active filter). For the export, you determine whether the selected or all filtered publications are to be exported - see step 3 in the screenshot "*Exporting only with attributes, without related data*"
- Whether an export template you have already defined should be used and, if so, which one - see step 3 in the screenshot "*Exporting only with attributes, without related data*"
 - If you save the definitions for an export via the "Save template" button in the left corner of the menu, then you can skip most steps the next time and simply call up the template again via "Do you want to use a template?"
- Which settings you want to use for your export - see step 4 in the screenshot "*Exporting only with attributes, without related data*":
 - What format you want to export to (Excel, BibTex, EndNote)
 - BibTex and EndNote exports offer no further settings. They follow a fixed definition
 - An example for an Excel export can be found below
 - Whether HTML tags in text fields should be converted to plain text
 - Whether internal IDs and/or the status of the entries in the system should be included- the internal IDs are very useful when you continue to work with the export and, for example, merge different contents in Excel via SVERWEIS / VLOOKUP
- When exporting to Excel you can specify which attributes you want to include - see step 5 in the screenshot "*Exporting only with attributes, without related data*":
 - Available attributes: These attributes belong to the list's rubric - e.g. publications - and are always available for a rubric's data entries
 - Related attributes: Every data object is related to other data objects - for example a publication is related to the journal it was published in. You define these relations actively in the editing mask of a publication, using the white-plus-on-blue icons. Of course you can export the attributes of this related content, too. Therefore you choose from the dropdown menu which related object you want to include, selecting their available attributes in a second step


Export records to Excel

Optional step: Filtering elements

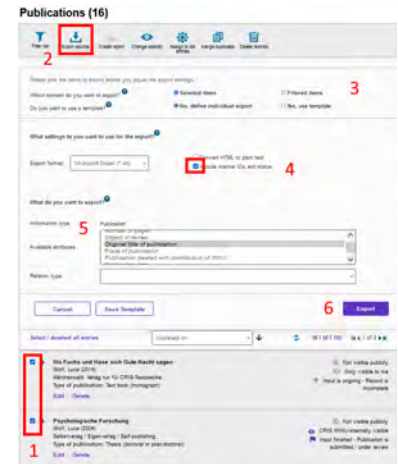
After [logging in](#) to CRIS, select "[Publications](#)" in the main navigation on the left. In the tool bar above the publications' list view, select the funnel symbol for "[Filter list](#)". In the second drop-down for this example, select the attribute "Publication year" and enter the year you are looking for. Activate the filter under "Apply". The filter symbol is now yellow and indicates that the filter is active. Now you can export the filtered elements in their entirety or specify an additional selection by marking the target elements.

Defining the Excel export

After you have marked the entries to be exported (see 1), select the second icon from the toolbar to

"Export records"  (the symbol shows an arrow pointing downwards - see 2). Clicking on the icon, opens a new menu where you can define your export:

- Which content you want to export (in our case "selected" - see 3)
- Which settings you want to use for the export (see 4) like
 - file format of the export: Excel
 - including internal IDs and status of the exported data
- When exporting to Excel you can specify which attributes you want to include:
 - Available attributes: These attributes belong to every publication and are always available for export. In the example we included original title, type and authors of the publications (see 5)
 - To select individual elements for export, hold down the CTRL key (Windows) / CMD key (iOS) while selecting the individual elements with the mouse and scrolling through the list
 - To mark all items for export, hold down the SHIFT key (both Windows and iOS), select the first item in the list with the mouse, scroll to the end of the list and select the last item in the list
 - Related attributes: Every data object is related to other data objects - for example a publication is related to the journal it was published in. You define these relations actively in the editing mask of a publication, using the white-plus-on-blue icons. Of course you can export the attributes of this related content, too
 - In the example on the right you see the attributes from the first example with further details for related persons, who authored the publications to export



Exporting only with attributes, without related data

- After the attributes of the publication have been defined as shown in step 5 of the screenshot "Exporting only with attributes, without related data", choose which related data should be included in the export, too. To do this, select the related element from the drop-down menu for "Relation type"
- In our example, we choose "Organisational affiliation to the University of Münster of the authors/editors" as first relation. Again, you determine the attributes to be exported, e.g. start and end date of the affiliation
 - ⚠ If you do not select any attribute here, the columns in the Excel file will shift and data will be displayed incorrectly. The data export has a bug. We are looking for a solution
- Next, we define the relation to the person. Here we select first and last name for the export
- As third relation, we select the organisation (e.g. the professorship) to which this person belongs. Here we select the name of the organisation

Clicking on the violet button "Export" will start the export as defined (see 6 on the first screenshot).

Via "Save Template" you can save this Excel export definition and re-use it again later.

The button "Cancel" will close the export menu and cancel the export process.

Using related elements and their attributes for export

Inbox and notifications

In the future, CRIS will inform you about certain actions. This rubric is still under construction. All menus that you see here are currently without function.

Content

- [CRIS notifications](#)
- [The CRIS Inbox](#)

CRIS notifications

In future, CRIS will inform you about certain actions - e.g. if there are queries from the ULB during publication validation. This notification function is currently still under construction. Bit by bit, the menus that are already visible will be filled with functions.

By default, CRIS sends messages within the system to the so-called Inbox, which you find at the bottom of navigation bar on the left. You will be informed about new messages by the bell next to your name in the top right-hand corner.

In addition, you can also have CRIS sent notifications to your usual e-mail inbox. To do this, go to [your settings](#) and tick the "E-mail" option under the notification options. Save the new setting by clicking on "Save":

The CRIS Inbox

This area is still under construction. This should give you an impression of what to expect later.

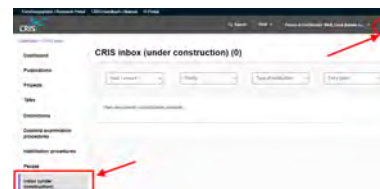


Image 1: CRIS Inbox

⚠ If you set up an [User delegation](#) for someone else editing your content, the person with this delegation will also receive all messages addressed to you. For example, your secretary will be informed about ULB queries at the same time as you if they have your user delegation.

Side Note: Thematic classification

In general

For years, the University of Münster has been using core profile areas and emerging fields to describe its diverse research activities. The resulting research profile was refined in the second half of 2023 to reflect current research development. At the same time, it became apparent that reports, e.g. for the state of NRW, will need additional categorisation of research information in the future.

To achieve this, two classification systems will be introduced in CRIS in spring 2024. In addition to the university's new research profile, they should make the thematically complex research information in CRIS more accessible - e.g. for interested groups outside the university, on websites or in analyses and reports.

Inhalt

- [In general](#)
- [Thematic classification in CRIS](#)
- [Research profile of the University of Münster](#)
 - [Conceptual Foundations & Emerging Technologies](#)
 - [Dynamic Societies](#)
 - [Healthy Individuals](#)
 - [Sustainable Futures](#)
- [Research fields according to KDSF-Standard](#)
- [Sustainable Development Goals \(SDGs\) of the United Nations](#)

Thematic classification in CRIS

From spring 2024 on, CRIS will have three systems for the thematic classification of research activities. With these, CRIS will respond to current research activities and prepare the system for new reporting and information requirements, for example at state level.

The aim is that all research activities since January 2024 will be categorised according to these new criteria. Two of the categorisation systems will become mandatory for all new content or older content that is edited:

1. The new areas of the university's research profile will be added to CRIS in March 2024. Both the old and new classifications will be available until the end of May 2024. After that, only the new Profile Areas and Emerging Fields will be available
2. The research fields of the nationwide KDSF standard will also be introduced in March. There will be a trial phase until the end of June 2024, after which their assignment to publications, projects, etc. will be mandatory
3. The UN Sustainable Development Goals (SDGs) are introduced as a new optional specification

The thematic classification needs to be assigned to each entry in CRIS. A simplified procedure can be used to do this:

- Each person can add 1 area of the research profile and 1 research field (as well as 1 optional UN SDG) to their personal profile, in which they are mainly active - please see [the tab "Thematic classification" in your personal profile](#) for more details
- These categories from the profile are automatically applied when a new entry is created / one's card is added to an entry, but can of course be modified manually for each entry - like [described here for talks](#)

In addition, each person can specify up to 3 further profile areas, research fields and UN SDGs in their profile, which will be used e.g. in the research portal in the future.

If you have any questions about the new process in CRIS, please contact cris@uni-muenster.de - also if you need support in categorising older content.

The three classification systems in CRIS are presented in more detail below:

Research profile of the University of Münster

Until the end of 2023, the [research profile of the University of Münster](#) was described using core profile areas and emerging fields, which you could assign to your content in CRIS. From 2024 on, new Impact Areas will replace these core profile areas. The University of Münster has established these four Impact Areas in order to bundle the disciplinary strengths and resources required to advance socially impactful, interfaculty and interdisciplinary cutting-edge research. Details can be found at <https://www.uni-muenster.de/forschung/en/impact-areas/index.html>

Thematically, the Impact Areas are divided into Profile Areas and Emerging Fields. These Profile Areas and Emerging Fields are available for selection in CRIS. They can be managed both in your [personal profile](#) on the "Thematic classification" tab and under the thematic classification of your content - e.g. in your [talks](#).

 You can download the categories in Excel here [Forschungsprofil der Universität Münster_Stand 06.03.2024.xlsx](#)

Conceptual Foundations & Emerging Technologies

- [Interdisciplinary Computing and AI](#): The University of Münster has a highly diverse range of disciplines which fosters state-of-the-art research, teaching and transfer in joint projects between computing, science and humanities

- **Mathematics:** The Profile Area covers the whole range from theoretical to applied mathematics, and fosters a culture of mathematical innovation
- **Nanosciences:** In the profile area "Nanosciences", researchers primarily focus on the synthesis, structure, dynamics and function of nanostructures
- **Quantum Science, Education and Technology:** Within the Emerging Field "Quantum Science, Education and Technology", scientists from physics, mathematics and computer science jointly explore and exploit the counter-intuitive properties of the quantum world in photonic, solid-state, and superconducting implementations, as well as hybrid versions thereof

Dynamic Societies

- **Accessing Cultures:** The emerging field "Accessing Cultures" bundles the exceptional disciplinary breadth of the University's research, teaching and transfer activities which explore diverse cultures and cultural areas from antiquity to the present day
- **Addressing Law:** The research activities in the profile area "Addressing Law" are marked by a high cross-faculty interdisciplinarity in which law as the culmination of diverse processes of negotiation is examined at various times in history and in various political and sociocultural contexts
- **Dynamics of Social Plurality:** With a view to historical and contemporary societies, the profile area "Dynamics of Social Plurality" focuses on the analysis of causes, mechanisms and effects of the dynamics of social plurality, along with their concomitant processes of interpretation and negotiation
- **Religion and Society:** The profile area "Religion and Society" investigates the complex interaction between religions and societies throughout history and across various cultures

Healthy Individuals

- **Cell Dynamics, Inflammation and Imaging:** The shared objective is to investigate which biochemical and biophysical properties influence cellular behaviour, how dynamic mechanisms in an organism maintain a healthy balance, and what happens during the course of illness
- **Individualisation:** The Profile Area "Individualisation" practices a fundamentally new interdisciplinary approach to understand individualisation which is characterized by strong participation of biology, chemistry and pharmacy, psychology, cognitive neuroscience, sports science, medicine, education and social sciences, philosophy, and mathematics and computer science

Sustainable Futures

- **Battery Research:** The research and development activities in energy storage, energy conversion and sustainability are key focuses of the profile area "Battery Research"
- **Biopolymers:** The University of Münster's emerging field "Biopolymers" is uniquely situated in the community thanks to the combination of research groups which are actively studying biopolymers at all scales, from the microscopic to the macroscopic
- **Exploring and Shaping Sustainability:** In addition to pursuing their own subject-relevant research, scientists at the University of Münster are applying inter- and transdisciplinary approaches in the emerging field "Exploring and Shaping Sustainability" to develop scientifically exceptional and socially relevant innovations and strategies for facilitating transformations in sustainability

As for the former core profile areas and emerging fields, not all researchers at the University of Münster will find their work represented in the new profiles and impact areas. For those an alternative category is available ("Unrelated to any area of the research profile").

i Tip: You can select the "Area of the research profile, in which I am mainly active" in [your personal profile](#) on the "Thematic classification" tab - which of course may also be the alternative category "Unrelated to any area of the research profile". This entry will then be automatically added to all new content (e.g. a new publication), to which you are linked with one of your cards. You can of course delete the automatic assignment for each entry and choose a different field.

i Please note: The university uses English terms in German texts. Accordingly, CRIS only uses English terms in both the German and English masks.


w If you enter content relating to years before 2024 (e.g. publication year of a publication), you can also (additionally) relate the old core profile areas. For content relating to the year 2024 or later, please only use the current Impact Areas from the University of Münster's research profile.

Research fields according to KDSF-Standard

In addition to the research profile of the University of Münster, the research fields will also become mandatory for entries in CRIS from July 2024 on and will be required in future reports, e.g. to the state of NRW.

These research fields are part of the [KDSF - Standard for research information in Germany](#). They are based on a cooperative project between the Humboldt-Universität zu Berlin and the German Centre for Higher Education Research and Science Studies (DZHW). The research fields are not focussed on individual subjects, but take an interdisciplinary approach. Accordingly, all academics should be able to find their subject areas here.

A list of all research fields can be found [here](#). In general, the research fields comprise 14 main categories with a total of 72 research fields.

 You can download the categories in Excel here [KDSF Forschungsfelder_Stand 09.04.2024.xlsx](#)

You can use the plus signs to expand the individual main categories:

Work and Economy

Work and economy - general	Research on aspects of work and economy in general	
Workplace and workplace design	Research on all forms of work, the labour market and the changes these are undergoing; paid and unpaid work as well as new forms of employment and work; job sharing; effects on people's health and other aspects of their lives	Working conditions, working from home, unconditional basic income, employment, work-life balance
Digital economy	Research on economic issues concerning digitalisation and its effects; research on concepts for digitising the economy	Internet economy, digital goods, global digital economy, new markets, digital business sector, digital business models, new types of business organisations

Earth and space

Earth and cosmos - general	Research on planet Earth and the cosmos around it in the broadest sense as well as on matter	
Matter	Research on properties, behaviour and use of matter in different states; on particles, their functions, utilisation and properties; on particle mixtures such as plasma; on structures of matter	Photonic crystals, nuclei, fields, high-energy neutrinos, dark matter
Planet Earth	Research on global phenomena of planet Earth, on global (material) cycles, on air, land and water on Earth, on the deep underground as well as weather	Weather forecasts, nutrient cycle within an ecosystem, (measurable) states of the atmosphere or troposphere
Regions of the Earth	Research on scientific explorations of regions	Coastal research, marine research, polar research, deep-sea research, mountain research, desert research
Space	Research on outer space and exploration of Earth from space	Space research, space technology, research under space conditions; space travel

Globalisation and sustainability

Globalisation and sustainability - general	Research on globalisation and its impact on the economy, society and environment as well as the sustainable development of these fields; regional aspects and the development of different regions of the world within an international framework	
Development cooperation	Research on technological, financial, personnel-related, national or international cooperation; research on poverty reduction as well as global and regional partnerships	Rural development, research on developing countries, development studies, development theory, regional studies, development economics, situation and security of the global food supply in crisis and conflict regions
Migration	Research on migration and its impact on people and society; research on forced migration; refugee protection; asylum and migration	Migration theory, migration research, immigration, refugees, asylum law, spatial mobility, social movements, migratory movements, integration
Sustainability	Research on sustainability in the broadest sense and how it can be achieved in various fields, areas and countries; this includes acting responsibly and research on principles of long-term use and impact of activities/projects; research on sustainable economic growth, sustainable consumption and sustainable production	Sustainable development, long-term development, permanent development, sustainable economy, environmentally friendly development, qualitative growth, sustainable economic activities/operations, sustainable growth

Industry

Industry - general	Research on technologies and methods of industrial processing of raw materials in general	
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Waste disposal and recycling	Research on recycling processes and methods; on the disposal of waste products and nuclear waste, on material cycles and life cycles of materials	Waste disposal, restoration of contaminated sites, hazardous substances, hazardous waste, waste recycling, waste prevention, waste management, waste reduction, circular economy
Intelligent manufacturing	Research on the entire process of design, development and manufacturing of machines and systems, as well as the development of new processes for production with the most modern information and communication technology, for digitalization in manufacturing and its processes through intelligent and interconnected systems and automation of processes	Fourth industrial revolution, intelligent manufacturing, digital factory, automated manufacturing, industrial automation
Robotics	Research on robots and humanoid robots	Intelligent robots, industrial robots, autonomous robots, process automation

Information technology

Information technology - general	Research on technology and its use in information processing	
Information security	Research on security in the digital space, protection against cybercrime, hacking, defence against cyber attacks, cyber security	Data security, security systems, data encryption, computer security, encryption methods, cryptosystems, data protection
Information systems	Research on systems of information generation and processing, also with regard to human interfaces and related business processes; cloud systems and distributed systems	Data processing, communication systems, data structures, algorithms, user interface, human-machine interaction, knowledge technologies, software systems
Information technology engineering	Research on technology and hardware for data processing	ICT technology, communications systems, information and communication systems, information technology
Internet of Things	Research on the electronic interconnection of things in analogue and virtual space with the aim of information exchange between objects; non-industrial production	Internet of services, internet of energy, autonomous agents, multi-agent systems, ubiquitous computing
Artificial intelligence and big data	Research on the processing of large amounts of data and/or semi-structured data for automated decision making as well as the technologies and algorithms required for this	Expert systems, machine learning, data analysis, deep learning, neural networks, data-intensive science, automation of intelligent behaviour, mass data, text and data mining, recommender systems
Simulation research	Research on modeling complex systems or processes and predictions about the future with the aim of gaining knowledge about real systems by means of information technology; simulation-based optimisation	Digital computer simulation, simulation technology, system simulation, digital simulation, computer model, computer simulation, climate simulation, multi-criteria optimisation models

Infrastructure

Infrastructure - general	Research on infrastructures required for supply and use; on sustainability and resilience of critical infrastructures	
Metropolitan areas and urban development	Research on urban development and life in cities and metropolitan areas; smart city research	Urban planning, urban development policy, urban development planning, urban development concept, municipal planning, urban spaces, conurbation, high-density areas, urban region, metropolitan region, agglomeration area
Building and living	Research on new, also automated, methods and techniques for the construction of buildings and structures and their equipment; on use-oriented construction and living in buildings	Energy efficient building and living, robust buildings, sustainable living, energy-optimised improvement of the fabric of buildings, multifunctional buildings and building complexes
Infrastructure and networks	Research on infrastructures of public services, such as power grids, gas networks, communication networks, facilities, structures, systems	Mobile communication networks, gas networks, intelligent energy network, network infrastructure, supply network

Mobility, transport and traffic	Research on the implementation of mobility in public space; the development of means of transport for the movement of goods or people	Intermodal traffic, logistics, transport chains, transport technologies, vehicle technologies, space-based applications for transport, assistance systems
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Cognition and knowledge

Cognition and knowledge - general	Research on methods of knowledge generation; on understanding, perception, and the functioning of knowledge and knowledge systems; also education for sustainable development	
Innovation	Research on measures to support innovation and the creation of innovation and new ideas	Innovation research, drivers of innovation, promotion of innovation, innovation support, progress, generation of ideas, generation of inventions, innovation process
Learning and learning processes	Research on lifelong and future-oriented, individual and sociological learning; on the transfer of knowledge and skills with technological support; on new forms of learning; on digital learning, capabilities and skills	Digital learning, lifelong learning, education and training, learning in formal and non-formal environments, digital competence, game-based learning
Human brain	Research on the processing of information, signals, emotions, perceptions in the human brain	Brain function, neurocognition, neural information processing, cognitive behavior
Language and language learning	Research on languages, language development and speech recognition, in the context of language learning by people and machines	Human language, artificial language, language systems, speech comprehension, voice recognition, language translation
Knowledge transfer and knowledge representation	Research on the generation of knowledge; on the representation, transfer and preservation of knowledge	Knowledge transfer, knowledge representation, reasoning, knowledge acquisition, recognition, knowledge preservation

Culture

Culture - general	Research focusing on various fields of culture; on cultural identities; on regions with regard to culture, their development and manifestation	
Creativity and performance	Research on expressions and forms of human creativity, mental effort and its manifestation in works (of art) and everyday products; on aesthetic and artistic aspects	Creative performance, creative achievement, creative techniques, production aesthetics, artistic creation, performing arts
Cultural heritage objects and cultural heritage	Research on material and immaterial cultural assets (tangible and intangible), their use (in the past and present), development, interpretation, storage and documentation as well as their accessibility in the physical and digital space	Protection of cultural assets, monument preservation, preservation in libraries, archives, museums, cultural heritage
Media	Research on various forms of media and their use as means of communication, their creation, use and application	Analogue media, digital media, multimedia, interactive media, print media, radio, journalism, computer-supported communication, audio-visual media, mass media, new media, social media

Life and well-being

Life and well-being - general	Research on preventive measures and quality of life, longevity through physical and mental well-being as well as physical and mental function and performance; on life and living creatures in general	
Artificial and synthetic life	Research on the development of new devices, components, systems made of organic materials; on reconstruction or redesign of systems occurring in nature	Artificial photosynthesis, synthetic cells, synthetic organisms, synthetic circuit, biological system
Living beings	Research on living beings and their development	Eukaryotes, fungi, plants, animals, humans, molecular physiology of living creatures or organisms, endangered species, biochemical evolution

Disease prevention	Research on the prevention of disease; on maintaining quality of life over a long period	Healthy aging, vaccine, prevention research, improving the state of health, examination of influencing factors, health awareness, public health research, quality of life
Therapy and healing	Research on healing; on different forms of therapy for people, on medication and holistic approaches	Treatment of disease, combating/controlling disease, medical therapy, medical treatment, treatment
Cells and genes	Research on functions of the cell and its components; on communication within and outside the cell; on genes and proteins as a special part of cell research; on reactions of cellular processes to external influences	Genome research, cellular function, cell formation, cell therapy

Materials

Materials - general	Research on properties, use and manufacture of different materials with organic and inorganic components; on hybrid and active materials and biofunctionalised materials	
Surfaces and interfaces	Research on surfaces of materials or solids as well as the transition between different solids and materials	Alloy, biofilm, antifouling, coating, pre-treatment of surfaces, layer technology, coating, composite material, surface technology, interface technology
Polymers	Research on properties and functions of polymers and their use; on development and optimisation of innovative and sustainable materials, processes and technologies	Synthetic polymers, biopolymers, chemically functionalised polymers, physically functionalised polymers, biologically functionalised polymers
Engineering materials	Research on engineering materials, their manufacture, processes and techniques when dealing with engineering materials; on manufacturing processes like drilling, welding, casting, etc.	Workpiece, new material, building material, component, industrial material, materials science, materials engineering, materials technology, materials, combustion technology, separation technology, material process, materials technology, intelligent materials

People and society

People and society - general	Research on aspects of social structure and social cohesion; on the organisation and structure of institutions; on individuals and their personal lifestyles	
Demographic change	Research on various aspects of demographic change (such as aging and immigration), on its consequences and possible solutions	Demography and its (future) consequences, population development, population science, population theory, population geography, age structure
Violence, conflicts and crisis prevention	Research on combating crime and violence; on dangers and conflicts in a country and between nations; on political diplomacy and solutions; on peaceful societies	Organised crime, protection from violence, reconnaissance and surveillance, resilience and protection of critical infrastructures, terrorism, civil security
Equality, diversity and inclusion	Research on aspects of equality and diversity in society; on social inequality; on inclusion in education and society; on genders and feminism	Inclusive education, diversity, equal rights, equal opportunities, promotion of women, equality
Political order	Research on political orders, their institutions and the functions executed by them, which shape the coexistence of citizens in a state; on democracy, law and order, consumer protection and effects of political decisions on social coexistence; on the promotion of institutions	Democracy, democratisation, reform process, legal practice, law and society and socio-legal research, political system
Transparency and responsibility	Research on social responsibility; on moral standards and questions of ethics of functionaries, people, organisations, institutions; on regulations and processes in society and economy	Fairness, responsibility, trust, transparency in connection with a field of application, e.g. new technologies, computer systems, biomedicine, normative bioethics, global ethics
Values and change	Research on values and norms of an individual and social categories of a society as well as how these change; on interpersonal relationships and parenting	Family in the digital transformation, social change, children's rights, same-sex lifestyle, gender diversity, justice, social norm

Nature and environment

Nature and environment - general	Research on the environment and animate and inanimate nature in the broadest sense, their change and living beings contained in them	
Climate change	Research on the effects of climate change on the environment and the existing biodiversity; on the adaptation of the environment and the existing biodiversity	Climate change, climate impact, environmental sustainability, ecological impact of climate change, ecological adaptation because of climate change, protection of the environment
Food and supply	Research on the cultivation, production and supply of food	Global food security, food shortage, malnutrition, nutritional research questions, mass production
Natural resources	Research on extraction, use, reuse of natural resources as well as water, soil, air, biomass; on access to clean water	Use of biomass, raw materials of the deep sea, water resource management, renewable fuels, biomass, new approaches to raw materials, resource efficiency, raw material alternatives
Use and management of natural spaces and landscapes	Research on regional development, land use and development of natural spaces as well as the protection, management and planning of landscapes	Sustainable use of landscape and natural space, forest damage research, landscape protection, natural landscape, cultural landscape
Ecosystems and biodiversity	Research on ecosystems and biodiversity, their role, function(ality), change and preservation of ecosystems; on measures to protect ecosystems and biodiversity	Preservation of the essential bases of human life, forest biodiversity, complex biosystem, ecological system, biotope, biodiversity, protection of species, biosystem, ecological damage in ecosystems
Protection and hazard safety, reactor security	Research on minimising risks from natural hazards; on dealing with natural disasters; on reactor safety	Risk minimisation strategy, natural hazard, disaster preparedness, safety research for nuclear reactors

Technology

Technology - general	Research on technologies which represent an important improvement on the status quo; on different components and elements, composite tools or machines	
Energy generation and energy conversion	Research on (new) forms of energy and renewable energies and their generation from different sources as well as related technologies for the conversion and transformation of energy	Wind energy, solar energy, hydroelectric power, alternative fuels, biological energy generation, energy transition, energy efficiency, energy use, hydrogen conversion, hydrogen storage, hydrogen energy technology, energy storage technologies, integrated energy management, vehicle drive, machine drive, alternative drive technology, low-emission fuel, drive system, drive technology
Semiconductor technology	Research on the technical manufacture of microelectronic and lighting components and microelectronic modules; on elements such as silicon	Photonic crystals, components based on quantum structures, compound semiconductors, organic semiconductors, microprocessor, microchip, integrated circuit, computer chips, intelligent sensors
Micro- and nanosystems	Research on technologies or methods which deal with structures and processes at the micro and nano scale	Microtechnology, microsystem solutions, microsystem technology, microelectronics, micromanufacturing, nanostructure, nanomedicine, nano safety, nanoscale system, nanomaterial, nanotechnology, submicrometer technology, submicron technology, nanostructure technology
Optics and photonics	Research on basics and applications of optical processes and technologies; on photonics, on light as a means of transport	Optoelectronics, quantum optics, integrated optics, optronics, optotronics, optical electronics, microoptics
Quantum technologies	Research on quantum effects, technologies, materials and uses	Quantum effects, quantum mechanics, quantum computing, quantum processor, quantum communication, quantum computer science, quantum sensor, quantum cryptology

Science

Science - general	Research on science, its processes and actors and changes in the scientific process	
Research infrastructures	Research on changes (e.g. development and improvement) of infrastructures for information provision and processing for research	Research tool, full-text database, (digital) library, research infrastructure, information infrastructure, literature supply, research information systems
Open science	Research on Open Access to data and research findings; on inclusion and equal opportunities in science and opening up of the entire research process	Open science, open data, open educational resources, open methodology, open peer review, open source, open access, citizen science
Science studies	Research on different aspects of science, their functions, their processes and actors	Theory of science, higher education research

Of course there is also alternative categories:

Alternative categories

Other research field	The research activity can be described as problem-oriented with a thematically definable subject area that cuts across disciplines. However, no assignment to the listed research fields is possible.
None of the listed research fields	

i Tip: You can select the "Field of research in which I am mainly active" in [your personal profile](#) on the "Thematic classification" tab. This entry will then be automatically added to all new content (e.g. a new publication), to which you are linked with one of your cards. You can of course delete the automatic assignment for each entry and choose another field.

If you are missing research fields, please contact us. We are collecting suggestions that we can submit to the KFiD (Commission for Research Information in Germany) for the next revision. Please understand that we cannot actively create new research fields.

Sustainable Development Goals (SDGs) of the United Nations

In 2015, the UN published 17 goals for sustainable development (SDGs) that provide an action plan for all UN member states to complete before 2030. These goals are set to pave the way for a sustainable world without poverty and inequality, with education and health for all, a protected environment, climate action and a sustainable economy.

 You can download the categories in Excel here [Sustainable Development Goals \(SDGs\) of the United Nations_Stand 06.03.2024.xlsx](#)

Of course, you can assign your research at the University of Münster to these [17 SDGs](#). This categorisation is optional in CRIS:

1. **No Poverty:** End poverty in all its forms everywhere
2. **Zero Hunger:** End hunger, achieve food security and improved nutrition and promote sustainable agriculture
3. **Good Health and Well-being:** Ensure healthy lives and promote well-being for all at all ages
4. **Quality Education:** Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
5. **Gender Equality:** Achieve gender equality and empower all women and girls
6. **Clean Water and Sanitation:** Ensure access to water and sanitation for all
7. **Affordable and Clean Energy:** Ensure access to affordable, reliable, sustainable and modern energy
8. **Decent Work and Economic Growth:** Promote inclusive and sustainable economic growth, employment and decent work for all
9. **Industry, Innovation and Infrastructure:** Build resilient infrastructure, promote sustainable industrialization and foster innovation
10. **Reduced Inequalities:** Reduce inequality within and among countries
11. **Sustainable Cities and Communities:** Make cities inclusive, safe, resilient and sustainable
12. **Responsible Consumption and Production:** Ensure sustainable consumption and production patterns
13. **Climate Action:** Take urgent action to combat climate change and its impacts
14. **Life below Water:** Conserve and sustainably use the oceans, seas and marine resources
15. **Life on Land:** Sustainably manage forests, combat desertification, halt and reverse land degradation, halt biodiversity loss
16. **Peace, Justice and Strong Institutions:** Promote just, peaceful and inclusive societies
17. **Partnerships for the Goals:** Revitalize the global partnership for sustainable development

i Tip: You can select the "Sustainable development goal to which I predominantly contribute" in [your personal profile](#) on the "Thematic classification" tab. This entry will then be automatically added to all new content (e.g. a new publication), to which you are linked with one of your cards. You can of course delete the automatic assignment for each entry and choose another SGD.

Persons and Organisations

You want to edit your CV, your contact details or details on your team? This chapter explains how to work on your personal profile, delegate editing rights to another user and which coordinating roles are available for organisations and certain type of projects.

Content

- [Your personal profile](#)
 - [Side note: CRIS Card](#)
 - [Side note: ORCID iD](#)
- [User delegation](#)
- [Coordination for an organisation](#)
- [Coordination for Joint Projects](#)

Your personal profile

Almost every person working at the University of Münster (and most FB05 persons working at the UKM) has an automatically generated CRIS account. Here they can create a personal profile (CV, publications, projects, etc.) in CRIS and add new content on an ongoing basis. Your CRIS profile will be initialised with master data from University of Münster / UKM personnel systems. Your personal profile is therefore ready for use when you first [log in](#). The personal profile (if publicly visible) is presented by default in the University of Münster [research portal](#) and can also be used on your institute's website via CMS tools like Imperia.

If you experience any trouble logging in or see incorrect default data in your profile, please contact us via mail cris@uni-muenster.de and tell us your University/Uni ID as well as details of the problem.

Here we explain how to edit and complete your personal profile.

Content

- [Log in and edit profile](#)
- [Edit personal details](#)
 - [Manage profile picture](#)
 - [Your card: Managing internal affiliations to the University of Münster & contact details](#)
- [Managing CV milestones](#)
 - [CV topics](#)
 - [Editing a milestone](#)
- [Thematic classification \(new March 2024\)](#)
- [Adding External Profiles](#)
- [Choosing Featured contents for Imperia](#)
- [Save and publish your personal profile](#)
 - [Saving your profile](#)
 - [Visibility of your profile](#)

Log in and edit profile

Please [log in to CRIS](#). On the start page / dashboard (Image 1a) you can click on "Edit" or the pencil icon next to your profile picture (or the placeholder for your picture) to access the editing mask for your profile.

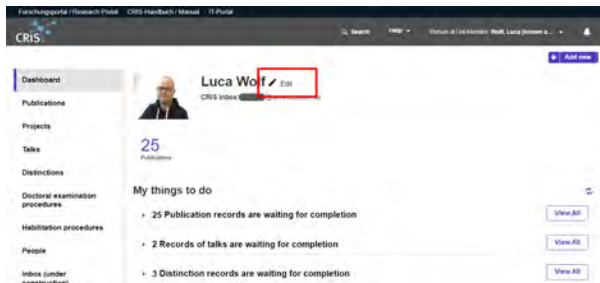


Image 1a: Dashboard after logging in

If you click on "People" in the left navigation bar, you see at least yourself in the [list view](#) (or colleagues if you are in a [coordinating role](#)). Choose "Edit" below your name and the editing mask for your profile opens (see Image 1b). Choose the name in the list view and you see a summary of a person's profile. Here you find "Edit" in the upper right corner to access the editing mask (see Image 1c).



Image 1b: Open editing mask via list view

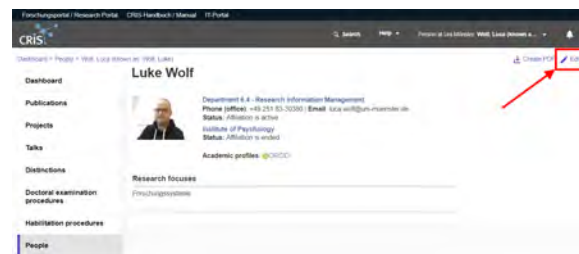


Image 1c: Open editing mask via person's profile summary

Your profile's details are organised in five different tabs. The first three tabs are always visible, while two are hidden under "More" on the right tab (see Image 2).

1. Key information: This tab shows basic information like names or titles (most of it is automatically set up by the system when creating your account). Furthermore you can edit your contact details (see step 4) and your profile picture (see step 3)

- CV: Here you manage all CV data, organised in different topics like academic education or professional career (see step 5). You can also add other information like research focuses, memberships, functions and even professorship offers
- Thematic classification: Here you can select e.g. areas of the university's research profile or KDSF research fields in which you (mainly) work
- External Profiles: On this tab you can manage IDs or links to other profiles on different platforms like ORCID or ResearchGate
- Featured contents: After adding e.g. your publications to CRIS you can here choose a selection of your content, which should be presented separately on your e.g. personal website via Imperia

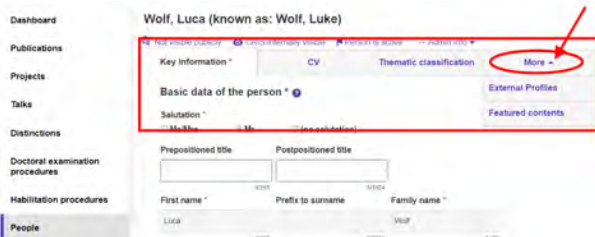


Image 2: Different topics of the personal profile

Edit personal details

The tab "Key information" offers details on:

- Basic data like names, titles, nationality, which are imported by the system
 - The internal [CRIS Inbox](#) address is generated from your University/Uni ID. In your [card](#) you manage your generally used official email address you want to show in your contact data on your institute's website
- Profile picture
- [Cards](#) with your affiliation to internal University of Münster organisations and your contact details

Most information in "Basic data on the person" are automatically imported from the University's personnel and IT databases. Changes of these information have to be done in these central University of Münster databases and will be (in most cases) transferred back to CRIS.

You can manage other details like your titles (see 1 in image 3) or **preferred first / family names** (see 2 in image 3). If you add e.g. a preferred first name, this preferred name will replace your official first name in your personal profile and on pages like your [research portal](#) profile or your institute's website. This preferred name is only valid on CRIS managed pages and will not be reported back to HR or IT.

If corrections on your University/Uni ID would be necessary (e.g. when you happen to have two University /Uni IDs), please contact us under cris@uni-muenster.de and explain what needs to be corrected.

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

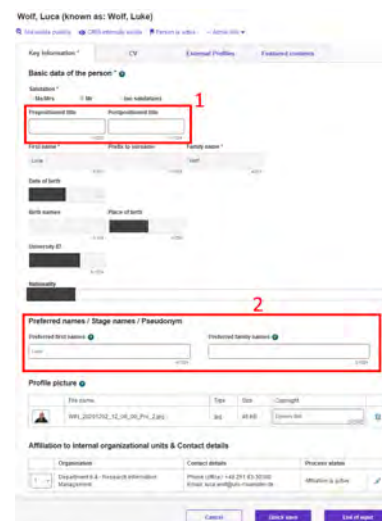


Image 3: Titles and preferred names

Manage profile picture

Under "Profile picture" you can upload a picture using the folder icon (see Image 4). Recommended are JPEG and PNG files. Profile pictures may be in upright (min. 200 pixels, ratio 4:3) or landscape (min. 150 pixels, ratio 3:4) format. We recommend upright format (200 pixels high, 150 pixels wide). Other ratios or sizes may cause display problems in the [research portal](#) or on institutes' websites managed by [Imperia](#).



Image 4: Choose and upload a profile picture


Your card: Managing internal affiliations to the University of Münster & contact details

Your affiliation to internal organizational unit of the University Münster is also called your "[card](#)" in CRIS as it contains your contact details. You find your [cards](#) in the editing mask of your profile on the first tab "Key Information" at the bottom under "Affiliation to internal organizational units & Contact details".



Image 5: Manage cards in your profile

The basic information is automatically imported from the University of Münster / UKM personnel system. Each [card](#) shows your affiliation to a certain organisational unit of the University of Münster. Cards are automatically imported and sorted based on data from the University of Münster's personnel systems. Thus if you work in different organisations at the University of Münster, you may have more than one active cards. Former affiliations to the University of Münster are organised in "ended" cards .

-  The card in position 1 is automatically linked to a new entry, e.g. for a new publication as an author. If, in addition to this preselected card, you want to link another of your affiliations, e.g. to the publication entry, you can search for yourself using the plus icon for the authors in the publication mask.

You can manage the following content of your cards by clicking on the pencil symbol (see square in Image 5) you want to present e.g. on your institute's page via one of the connected CMS tools:

- Contact details (hence the name "card") like your office or lab phone number, your Email address or your personal URL
- Further information like consultation hours

For FB04 / School of business and economics please enter your organisational group into "Organisation-related staff category (for FB04)" - [further details please find here](#)

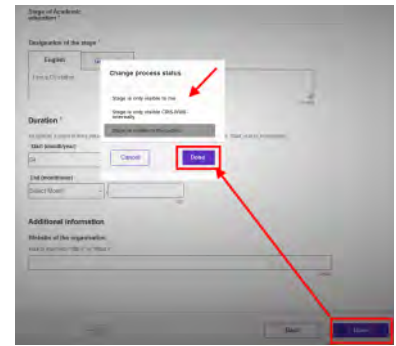


Image 6: Manage your card details and set its status

 **Organisation-related staff category (for FB04)**

Click + to open the table

Professoren
Emeriti
Außerplanmäßige Professoren
Vertretungsprofessoren
Honorarprofessoren
Gastprofessoren
Juniorprofessoren
Seniorprofessoren
Privatdozenten
Sekretariat
PostDoc
Akademische Direktoren
Akademische Oberräte
Akademische Räte
Wissenschaftliche Mitarbeiter
Mitarbeiter
Externe Doktoranden
Assoziierte Doktoranden
Lehrbeauftragte
Wissenschaftliche Hilfskräfte
Studentische Hilfskräfte mit Bachelorabschluss
Studentische Hilfskräfte
Studentische Mitarbeiter
Ehemalige Mitarbeiter
Ehemalige Studentische Hilfskräfte
Ehemalige Angestellte
Gastwissenschaftler
Systemadministration
Bibliothek

Alumni

After clicking the pencil icon, a new layer with the card's editing mask will open. Manage your details and click on "Done" when finished. A status windows will appear where you confirm the card status and then return to the profile's mask.

If there are any questions concerning your cards, please contact us via CRIS@uni-muenster.de - for example if you are missing an affiliation - and we will check the information we receive from the University of Münster systems.

Managing CV milestones

CV topics

The profile's editing mask allows you to manage five CV topics (see Image 7):

- Research focuses
- Academic education
- Professional career
- Memberships and (external) functions
- Professorship offers

Using the plus icon you can add a new entry / milestone to this topic. An additional data entry mask will open and allows you to enter your information, see below the example for an academic milestone. Of course you can use copy & paste for information from other documents.

Some tips:

- Use an individual entry for each of your research focuses - e.g. "group dynamics" and "social groups" as two separate entries, not as one
- Memberships and functions work the same way as milestones of your education or career. Here you can manage as well current as former activities with start and end year - e.g. the membership in an editorial board of a scientific journal

Please note: You decide for each entry if it should be [publicly visible](#) or not if your personal profile is publicly visible. By default each new entry is publicly visible. If you want to change this, you can do so when saving a specific entry via its status selection menu (see Image 10).

Editing a milestone

In this example we will add a new entry to your academic education. Click on the blue plus icon for this topic, marked with an arrow on Image 8.

Now you can describe this milestone in German and English (please note: German (see 1 on image 9) is always the leading / mandatory language, even when using English (see 2 on image 9) as screen language). For example in which field and at which university you earned your bachelor's degree.

Start and end dates can be used as month/year (09/2020) or only as year (2020).

- If an entry does not have an end date, the system will assume that this station is a current one and adds "since" to the start date
- If you want to use a fixed date (e.g. for an exam), you enter the same date to start and end date - e.g. „06/2020" to both fields

Now click on "Done". The status selection menu will open and let you choose both [status and visibility](#) in one step. By default each new entry is publicly visible if your profile is visible, too.

After confirming the status, you are back in the CV mask. If you want to add another milestone (e.g. your master's degree), click again on the plus icon. You can edit each entry with clicking the pencil icon next to the entry. And of course you can delete your entries - see die dustbin icon in Image 8. Please note that the order of the entries is only an internal attribute - [research portal](#) and institutes' website via [Imperia](#) sort entries chronologically.

Please (quick) save your profile after editing a CV milestone.

DFG requirements concerning dates in CVs

Please note that the DFG requires [dates in CVs to be listed both with month and year](#). If possible add months to your CV dates when first entering the data. This way you can generate "DFG compliant" CVs directly from CRIS.



Image 7: CV topics



Image 8: Adding and editing a milestones of your academic education



Image 9: Language options for text fields

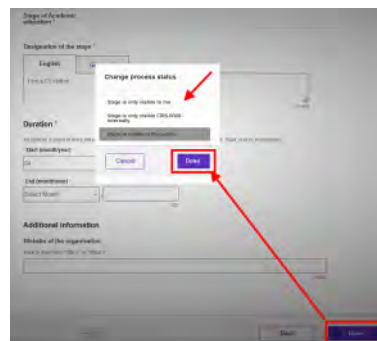


Image 10: Saving a milestones of your academic education

Thematic classification (new March 2024)

From spring 2024 on, CRIS will have **three systems for the thematic classification of research activities**:




- Research profile of the University of Münster
- Fields of Research according to KDSF standard
- Sustainable Development Goals of the UN (SDGs)

Two of these classifications will be mandatory for entries like [talks](#), publications or projects:

- The new areas of the university's research profile will be added to CRIS in March 2024. Both the old and new classifications will be available until the end of May 2024. After that, only the new Profile Areas and Emerging Fields will be available
- The research fields of the nationwide KDSF standard will also be introduced in March. There will be a trial phase until the end of May 2024, after which their assignment will be mandatory
- The UN Sustainable Development Goals (SDGs) are introduced as a new optional specification

To simplify the process for you, you can define one category for each classification system in your personal profile that is automatically added to (new) entries as soon as your card is linked to the entry.

For example, to select the area from the research profile of the University of Münster in which you are mainly active, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your personal profile by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your profile
 - Areas already connected to your entries, such as talks, are not deleted by this step. Only if you add another of your cards to an existing talk, the new research area will be added in addition to the previous one
- Remember to (quick) save your profile or exit the mask via "End of input". Only then your new main research area will be available to the rest of the system

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

In addition, each person can specify up to 3 further profile areas, research fields and UN SDGs in their profile, which will be used e.g. in the research portal in the future. These additional categories will not be automatically linked to new entries.



Image 11: Selecting main area from the university's research profile

Adding External Profiles

On this tab (hidden behind the title "More") you can manage links to external profile. We recommend especially [adding your ORCID iD in the IT portal](#):

- Your ORCID iD is managed directly in the IT portal of the University of Muenster - CRIS will import this ID. For further details please check the [Side note: ORCID iD](#)
- Academic profiles like external author IDs (e.g. Scopus Author ID)
- Further profiles at network services (e.g. LinkedIn or ResearchGate)

 If you add information on external profiles here, CMS like [Imperia](#) will link these profiles in your contact data. Imperia is using the platforms' icons

Academic Profiles

for this - e.g. as "Academic profiles"      .

Choosing Featured contents for Imperia

All your research output in CRIS (if publicly visible) is by default available in the [research portal](#) connected to CRIS. In addition you can connect your data to other University of Münster websites, using [CMS tools like Imperia](#). Here you can display specific output as "featured content" (hidden behind the title "More") and show it separate from the rest of your e.g. publication list - either only this selection or automatically next to the complete list.

To select featured content from your CRIS data, just create a relation your content in your CRIS profile using the plus icon for:

- up to 5 projects
- up to 10 publications
- up to 5 distinctions



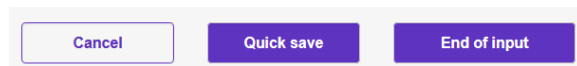
Image 12: Featured content

Of course you can always change the selection of these featured content.

Save and publish your personal profile

Saving your profile

When working on a data entry, e.g. your profile, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- The button "End of input" triggers a data validation which checks if all mandatory fields are filled. Working on your [personal profile](#) you will see only one status - "Person is active". There are no further selection options, you can only confirm this status by clicking "Done". The reason for this is that your CRIS account was defined automatically and all mandatory fields were answered during this step. Your personal profile is therefore ready for use

Visibility of your profile

Your personal profile as a whole has a [status and a separate visibility](#) - same as e.g. publications. When you log in to CRIS for the first time, your (by default active) personal profile will not be publicly visible because of data protection reasons. If you want to change this, you set the public visibility via the options available in the list view for People (normally, you can only see yourself here). If you allow public visibility, your profile is published in the [research portal](#) and your data is available to tools like Imperia, which manage data for your institute's website. The individual CV entries, which are public visible, will also now be visible "to the internet". To manage the profiles visibility:

- Open the People list view by clicking on the rubric in the left navigation bar
- Select the / your profile for which you want to change the visibility by checking the box in front of the record
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the box in front of the visibility level you confirm that the following action will affect the selected visibility level
- To: Here you select if the profile should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but its connection to you is no longer visible
- Active personal profiles are by default always visible within CRIS

i After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)



Image 13: Manage visibility of a profile

Side note: CRIS Card

Almost every person working at the University of Münster (and most FB05 persons working at the UKM) has an automatically generated CRIS account.

- A [CRIS account](#) and its initial card is automatically generated for staff of the University of Münster (UM) and also for most FB05 employees working at the Münster University Hospital (UKM). Your CRIS profile will be initialised with master data from UM / UKM personnel systems
- If a person does not have a CRIS account (e.g. visiting academics / researchers, scholarship holders), please contact us via mail cris@uni-muenster.de and tell us your University/Uni ID as well as your position at which organisation at the University of Münster and when it started. We will set up an account plus the according card for you

All mandatory fields for this account, the card and your [personal profile](#) were answered based on data from other University / UKM systems during this step. The personal profile (if publicly visible) is presented by default in the University's [research portal](#) and can also be used on your institute's website via [CMS tools like Imperia](#).

Organisational function of a card

Your internal affiliation at the University of Münster is represented by your card and of central importance in CRIS. It is used to relate your personal profile to the University / UKM organisations you work at.

Each card shows your affiliation to one certain University / UKM organisational unit or institute (and is generated based on contract data received from personnel systems). If you work in different University / UKM organisations, you will have multiple cards, each representing one specific affiliation.

In CRIS, this card is also used to relate all your content such as publications, projects or received awards to your personal profile and to the institution you are affiliated with (see Figure 1). This way all your content is not only connected to you, but also to the organisation in which context it was created. Therefore, you should always make sure - e.g. when adding colleagues to projects - that you select the "matching" card of this person to the "matching" institution.

For example: With the coordinating role for the Institute of Applied Physics, you can edit the entries that are related to said institute. Entries related to the institute via a card link the person Alex Mustermensch to the Institute of Applied Physics. If Alex's card is now related to a publication, then thanks to the card this publication also belongs to the Institute of Applied Physics and appears both in Alex's research profile and on the institute's website. Alex now notices a spelling mistake in the publication's title and asks you to correct it. Also Alex needs some new details on their CV, which you can edit for Alex as they are a member of your organisation.

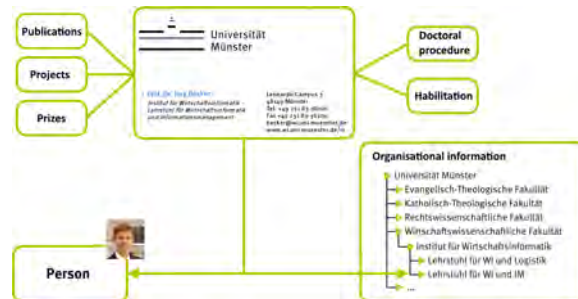


Image 1: Function of a card

Technical function of a card

The card not only reflects your respective affiliation at the University of Münster, but fulfills several important technical functions:

- The card determines which content a person is allowed to see and edit, e.g. I myself only see the content related to my own cards and in case of an [user delegation](#) I only see content related to the cards of the delegating person
- The card determines which content a person with a [coordinating role to a University organisation](#) is allowed to see and edit - namely content related to cards affiliated to the organisation they are allowed to coordinate (see the example above)
- [CMS tools like Imperia](#) "collect" data to a person based on their cards and then display this content on e.g. this person's institute website - either only the content associated with the person's selected card or all content of all cards of the person

Accordingly, technical problems might occur if a relation to a card is missing. For example:

When you create a new publication, CRIS automatically relates this new publication to your current / active card. You decide now to rather relate the publication to another, older card - because the publication was written during your previous position. So you delete the related current card from the author assignment. Then you click on "Quick save" and suddenly you see an error message stating that you lack the rights to this entry.

What happened?

You quick saved without relating the old card. When you saved, there was no card connected to this publication and CRIS therefore no longer knew that you are allowed to edit this publication. Because: No card, no rights to an entry. In such a case, simply write to cris@uni-muenster.de and describe what happened. We can then restore the relation for you, so that you can access your own entry again. And we would give you the advice that you should first create the new relation to your older card and only then delete the current one. And after that, quick save.

Managing cards

Cards are created and sorted automatically based on information CRIS receives from other systems:

Organisation	Contact details	Process status
Department 6.4 - Research Information Management	Phone (office): +49 251 63 30380 Email: luka.wolf@uni-muenster.de	Affiliation is active <input checked="" type="checkbox"/>
Institute of Psychology	Phone (office): Email:	Affiliation is ended <input type="checkbox"/>

Image 2: Edit card in personal profile

- For University employees card data comes from personnel SAP databases, based on a few selected pieces of information from work contracts
- For UKM employees CRIS receives data from different sources of UKM data - e.g. from the UKM's telephone system. Unfortunately this data tends to be incomplete

Each card shows your affiliation with a certain University / UKM organisational unit. Your current or new or only card is by default in an "active" status. If you work in different University / UKM organisations, you may have more than one active card. Former University / UKM affiliations are organised in "ended" cards.

Cards can neither be added manually nor can the affiliated organisation be changed by yourself or your organisation's coordinator. If it is necessary to add a card manually (e.g. for the affiliation to an excellence cluster), please contact cris@uni-muenster.de.

You find your cards in the editing mask of your [personal profile](#) on the first tab "Key Information" at the bottom under "Affiliation to internal organizational units & Contact details".

- Active cards are always listed on top
- Add or edit card content like contact details or consultation hours. Just click on the pencil icon right to this card entry (see square in Image 2)

After clicking the pencil icon a new layer with the card's editing mask will open. Manage your contact details and consultation hours. Click on "Done" when finished. A status windows (see Image 3) will appear where you confirm the card status and then return to the profile's mask.

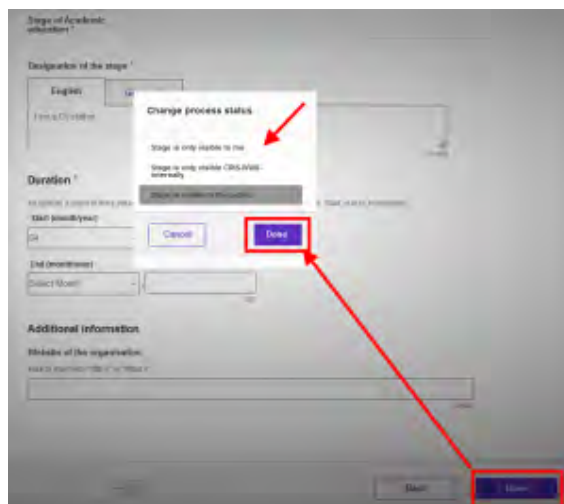


Image 3: Manage your card status

Status of your card(s)

The status of cards is defined automatically based on information CRIS receives from personnel databases. A card passes through different statuses:

- **Affiliation is imported - not yet active:** CRIS receives information on this person's University affiliation, but the contract has not started yet
- **Affiliation is active:** This affiliation to the University of Münster is active and will remain active as long as the contract is active, based on information received from personnel databases
- **Affiliation is in transition period:** If according to personnel databases this affiliation ends (e.g. because the contract ended) or no further information about this affiliation are available, the card is automatically set into a transition period. During this period, changes in the card are still possible
- **Affiliation is ended:** After 6 months the transition period ends and the card is automatically closed by CRIS
 - Data on University affiliations is sometimes unclear or faulty, which in consequence may cause wrong card statuses. For example for UKM employees or student assistants as CRIS receives their data from different sources
 - Also for persons, who change from a University contract to e.g. a scholarship, as CRIS only receives information about the end of the contract but not on the start of the scholarship. Here the CRIS team has to manually set up a new card
 - Last but not least, when updating CRIS in May 2022, (older) cards had to be ended as no further information on these affiliations were available from the personnel databases
 - If in doubt, please contact cris@uni-muenster.de

Frequently asked questions concerning cards

Cards are generated automatically based on contract data received from personnel systems. It may happen that the card does not represent your current position / internal affiliation. In some of these cases the CRIS team can be of help, in other cases you need to contact your HR person.

Cases in which the CRIS team can assist you:

- You see all your cards in the editing mask of your personal profile, but your most current one is not visible in the research portal
- The chronological order of the cards is not correct (the CRIS team might check the system sorting)

Cases in which you may need to contact HR management:

- You changed positions within the University of Münster. It takes some time until all system are updated concerning your new position - latest when you start your new duties
- You are affiliated to the "wrong" University organisation. Here we will ask you what your contract says (if necessary together with HR) - e.g. you are working in team Mustermensch, but your contract is issued to the Institute of Applied Physics. In this case CRIS will receive a card for the institute
- Your student assistant is not affiliated to your group, but to a colleague's. Again, here you need to check (if necessary together with HR) what is written in the assistant's contract

Best write us an email to cris@uni-muenster.de describing your case. We will check your request and advise you which administration office has to be contacted in addition. Please include the following information:

- Name and University/Uni ID of the person concerned

- Name of the University / UKM organisation concerned
- Start / end of the position

Side note: ORCID iD

ORCID (Open Researcher and Contributor ID) is a global, not-for-profit organisation, see <https://orcid.org/>. ORCID's vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions across disciplines, borders, and time by the ORCID iD: a unique, persistent identifier for researchers. The ORCID iD can be used to relate the work to a person, even if the name used as an author differs (Alex Mustermensch versus A. Mustermensch versus A. B. Mustermensch versus Alex Musterman). Research activities and organisations can be linked to these IDs using several open services.

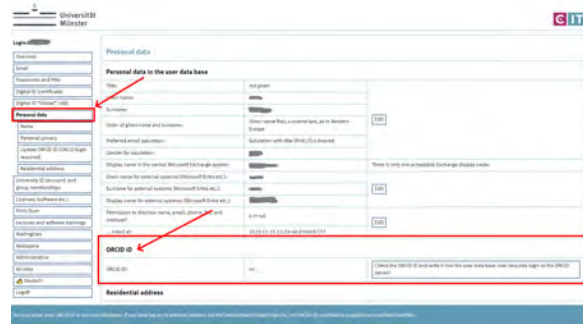
In CRIS the ORCID iD is part of your [personal profile](#) - under the tab for "External Profiles".

However, you do not maintain the ORCID iD directly in CRIS, but in your university IT portal uni-muenster.de/IT-Portal/ or "IT Portal" on the [CIT homepage](#).

Click on "Personal data" in the bar on the left.

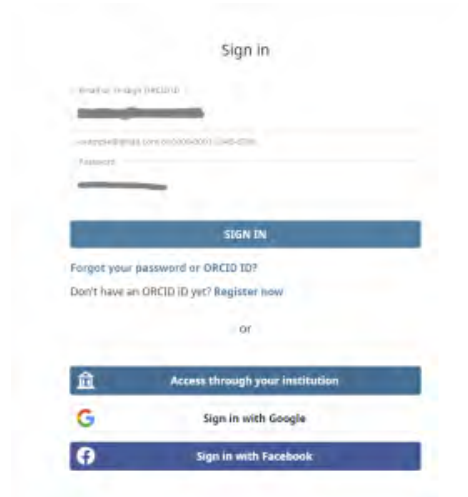
Here you will find the ORCID iD option, which you can now use to retrieve your iD directly.

To do this, click on the button "Check the ORCID iD and write it into the user data base now (requires login to the ORCID server)".



You will be forwarded to the university-external ORCID login, where you can log in with your data or the access option of your choice.

If you do not have an ORCID iD yet, you can also register here.



Once you have successfully logged in to ORCID, you will be redirected back to your IT portal.



The ORCID iD will be automatically transferred to CRIS the following night.

- If you already have an ORCID entry in CRIS, this will be overwritten with the ORCID iD from the IT portal
- If the corresponding field in CRIS is empty, the ORCID iD from the IT portal will be used

From CRIS, the ORCID iD is displayed in the [research portal](#). It is also transferred to CMS such as [Imperia](#) or the [FB04 tool](#), via which the ORCID iD can appear on your personal pages.

User delegation

CRIS Users can assign / delegate their editing rights to their content (CV, publications, projects etc.) to another user. This way the other person can switch into the person's user role and act "as if" they are said person - for example edit and add entries for that person. Persons only need active CRIS accounts for such a delegation:

- Almost every person working at the University of Münster (and most FB05 persons working at the UKM) has a automatically generated CRIS account
- If a person does not have a CRIS account (e.g. visiting academics / researchers, scholarship holders), please contact us via mail cris@uni-muenster.de and tell us your University/Uni ID as well as your position at which organisation of the University of Münster. We will set up an account for you. Please note: You need to log in first to activate your account!

You can manage your user delegations on your own, no need to contact the CRIS team for this.

BTW: You can delegate the editing rights to your profile parallelly to multiple users (e.g. your student assistant and your secretary). But keep in mind that both persons will have the exact same editing rights to your content as you - there are no additional filters or the like.

Content

- 1) Manage User delegations
 - [Log in and find your settings](#)
 - [Define a delegation of your rights](#)
 - [Delete an user delegation](#)
- 2) Editing content for another person: [Switching roles](#)

1) Manage User delegations

Log in and find your settings

[Please log in to CRIS](#). In the corner in the upper right you will see your name (Person at Uni Münster: Your name). Click on your name and a drop-down-menu will appear. Please choose "My settings".

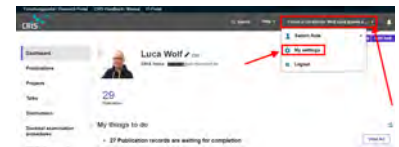


Image 1: Dashboard after logging in to CRIS

Define a delegation of your rights

Under settings you find "User Delegation" as last of the options. To define a new User delegation, click on the button "New delegation".

User delegation

New delegation



Image 2: Searching for a user by their name

Next you can search (see Image 2a) for the **last name** or **University/Uni ID** (which is unique and therefore easier to find) of the person you want to delegate rights to. Enter e.g. the Uni ID and click on the looking glass icon to activate the search. ⚠ Please note: The person you want to find needs to have been logged in to CRIS at least once to activate their account.

After finding the person you were looking for, click on the blue plus icon in front of the name. Confirm that you want to delegate editing rights to your content to this person by pressing the orange button "Delegate" (see Image 2b).

Image 2b: Confirm delegation

The next time this person logs in to CRIS your user delegation is activated and they can switch into the new role.

You can check any time which delegations you defined and who has editing rights to your content (see Image 3).



Image 3: Overview of active user delegations

Delete an user delegation

Of course you can delete an user delegation whenever you want. Just go to the user delegation menu in your settings. You see a list of active user delegations. On the right side of each entry is a dustbin icon (see Image 4). Click on the dustbin next to delegation you want to delete. Confirm your decision.



Image 4: Delete user delegation

The next time this person logs in to CRIS, your user delegation will be gone from their account. There will be no further consequences for this person's account, everything will be the same except for the disappeared delegation option.

2) Editing content for another person: Switching roles

If someone delegated their editing rights to you, you need to switch between your own user role and the user role of this other person. If you switch into another's person user role, you can act in the system "as if" you are this person. But you can always act only as one person at a time, so that you can either work on your own user's content or on the other person's content. This way you cannot mix things up. To switch roles:

[Log in to CRIS](#) (or first off, then in again if you were logged in during the delegation step).

In the corner in the upper right you will see your name (**Person at Uni Münster: Your name**). Click on your name and a drop-down-menu will appear. Please choose "Switch Role". Another selection will appear where you can choose a role available to you (see Image 5). If you click on the other person's name / role (in the example someone with the same name working at the UKM), you switch to their account and land on their dashboard. Now you can edit their content in their name.

To switch back to your own profile, click again on the name in the upper right corner (currently the name of your colleague), open the role selection and choose your own name / role (in the example the first options). You jump back to your own dashboard and can work again on your own profile.

i If you have more than one role in CRIS - e.g. an user delegation and / or an [organisational coordination role](#), you can re-arrange the order, in which the different roles are presented in this menu, in [your settings](#). Also, the role on top is your default role: This is the role you see first when logging in to CRIS.

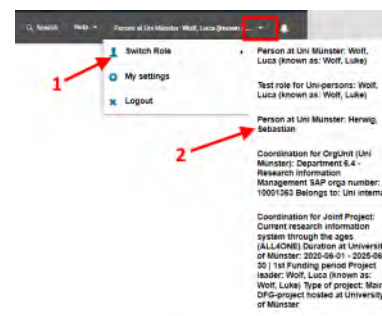


Image 5: Switch between roles

Coordination for an organisation

Each organisational unit (or short: organisation) at the University of Münster / UKM like institute, seminar or centre has the possibility to announce a specific person to have editing rights for all CRIS content of said organisation. Such a coordinating role within CRIS ensures that data maintenance is bundled on institutional level. Coordination rights are managed by the CRIS team.

This role "Coordination for an organisation" is some kind of "content manager". They have access to all CRIS data related to the organisation via [cards](#) which in return are connected to persons and their publication, projects etc.. They can coordinate how this data is linked to the organisation or to personal profiles plus manage information transferred to websites [via CMS tools](#) or project websites plus add new content for example when importing new publications. The main difference to a [user delegation](#) is that here a person can edit only the content of another person (e.g. Professor X), but someone with the coordinating role can edit all the data related to Professor X's chair and all other persons connect to this professorship.

For example: With the coordinating role for the Institute of Applied Physics, you can edit the entries that are related to said institute. Entries related to the institute via a card link the person Alex Mustermensch to the Institute of Applied Physics. If Alex's card is now related to a publication, then thanks to the card this publication also belongs to the Institute of Applied Physics and appears both in Alex's research profile and on the institute's website. Alex now notices a spelling mistake in the publication's title and asks you to correct it. Also Alex needs some new details on their CV, which you can edit for Alex as they are a member of your organisation.

Furthermore new information on CRIS is forwarded first to persons with a coordinating role so that they can function as a multiplicator within the organisation. They can also provide additional CRIS trainings within their organisation.

Content

- [1\) Granting coordination rights for an organisation](#)
- [2\) Using coordination rights: Switching roles](#)

1) Granting coordination rights for an organisation

Coordination rights are managed by the CRIS team. Granting someone coordination rights has to be authorised by one of the leaders of said organisation. We recommend discussing this step with the organisational members before commissioning editing rights to a specific person, in particular, if the respective University of Münster / UKM organisation has several sub-organisations with different professors and team leaders.

To request granting coordination rights for your University of Münster / UKM organisation, please write an email to cris@uni-muenster.de including the following information:

- the name of the University of Münster / UKM organisation you are leading,
- the full name of the person you want to grant coordination rights to,
- this person's University/Uni ID (of course not the password).

If the person, whom the coordination rights are granted to, already has an active CRIS account, the CRIS team can set up the new coordinating role quickly. However, if a new CRIS account has to be created, it may take some time as the person needs to log in with / activate their new account before the new role can be transferred. We will contact the person in question and take care of a smooth process.

By the way:

- More than one person can have coordination rights to one organisation (e.g. one of your research team members and your secretary). But keep in mind that both persons will have the exact same editing rights - there are no additional filters or the like
- The person with the coordinating role does not necessarily have to belong to the organisation they are coordinating in CRIS. This way one person could take care of two similar organisations parallelly

2) Using coordination rights: Switching roles

If you are granted coordination rights for an organisation, you need to switch between your own user role and the coordinating role. Please note that you can always act only in one role at a time, so that you can either work on your own user's content or on the organisational content. This way you cannot mix things up. To switch roles:

[Log in to CRIS.](#)

In the corner in the upper right you will see your name (**Person at Uni Münster: Your name**). Click on your name and a drop-down-menu will appear. Please choose "Switch Role". Another selection will appear where you can choose a role available to you (see Image 1). If you click on the option for the organisational role (the last one in the example's selection), you switch to the e.g. department's dashboard. Now you can edit and coordinate CRIS content linked to this organisation.

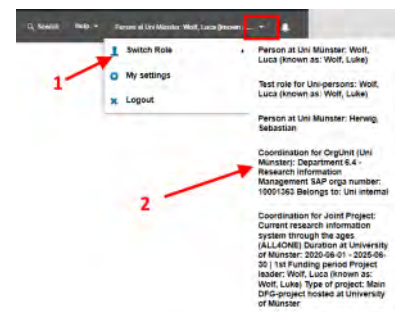


Image 1: Switch to the coordinating role

To switch back to your own profile, click again on the name in the upper right corner (currently the name of the organisation), open the role selection and choose your own name / role (in the example the first option). You jump back to your own dashboard and can work again on your own profile.

i If you have more than one role in CRIS - e.g. an [user delegation](#) and / or an organisational coordination role, you can re-arrange the order, in which the different roles are presented in this menu, in [your settings](#). Also, the role on top is your default role: This is the role you see first when logging in to CRIS.

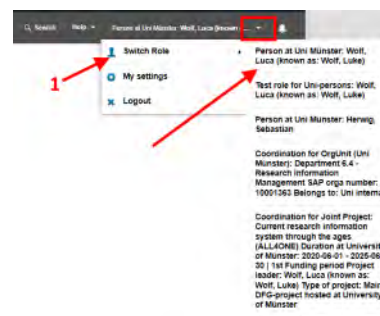


Image 2: Switch back to the own person role

Coordination for Joint Projects

Each joint project managed at the University of Münster / UKM has the possibility to announce a specific person to have additional rights for CRIS content of said joint project. Such a coordinating role has access to the main project in CRIS.WW, sub projects and different funding periods, ensuring that data maintenance is bundled across cooperating institutes.

This role "Coordination for Joint Project" is some kind of "content manager". They have access to CRIS data related to the joint project via [cards](#) which in return are connected to persons and their publication, projects etc. This way they can coordinate

- relations of team members to sub projects and their role in each sub project
- relations of publications, talks, received awards etc. within the joint project's context
- information displayed on project websites via additional [CMS tools](#)

Furthermore new information on CRIS is forwarded first to persons with a coordinating role so that they can function as a multiplicator within the project.

For example: With the coordinating role for the joint project "Research information systems through the ages", you can see which persons are assigned to the sub projects via their CRIS card as a team member. You can now link the publications on project results authored by these persons to the various sub projects. Within certain limits, you can relate cards of new team members to the sub projects and define their project role. You manage the information on the different sub projects and optimise the content on the project website. You can link new, external partners to sub projects. You are the first contact for project team members on CRIS issues and are in contact with the CRIS team to ensure a good external presentation of the joint project.

Please note: For safety and data protection reasons, this role **cannot create** new content for persons (e.g. importing new publications) nor edit a person's profile. This can only be done by a person, someone with a [user delegation](#) or someone with a [coordinating role for organisations](#).

Content

- [1\) Granting coordination rights for a joint project](#)
- [2\) Using coordination rights: Switching roles](#)

1) Granting coordination rights for a joint project

Coordination rights are managed by the CRIS team. Granting someone coordination rights has to be authorised by one of the leaders of the joint (main) project.

To request granting coordination rights for your joint project, please write an email to cris@uni-muenster.de including the following information:

- the name of the University of Münster / UKM managed joint project you are leading,
- the full name of the person you want to grant coordination rights to,
- this person's University/Uni ID (of course not the password).

If the person, whom the coordination rights are granted to, already has an active CRIS account, the CRIS team can set up the new coordinating role quickly. However, if a new CRIS account has to be created, it may take some time as the person needs to log in with / activate their new account before the new role can be transferred. We will contact the person in question and take care of a smooth process.

By the way:

- More than one person can have coordination rights to a joint project (e.g. administrative team members from two cooperating institutes). But keep in mind that both persons will have the exact same editing rights - there are no additional filters or the like
- The person with the coordinating role does not necessarily have to belong to the project they are coordinating in CRIS

2) Using coordination rights: Switching roles

If you are granted coordination rights for a joint project, you need to switch between your own user role and the coordinating role. Please note that you can always act only in one role at a time, so that you can either work on your own user's content or on the joint project's content. This way you cannot mix things up. To switch roles:

[Log in to CRIS.](#)

In the corner in the upper right you will see your name (**Person at Uni Münster: Your name**). Click on your name and a drop-down-menu will appear. Please choose "Switch Role". Another selection will appear where you can choose a role available to you (see Image 1). If you click on the option for the joint project role (the last one in the example's selection), you switch to the main project's dashboard. Now you can coordinate CRIS content linked to this joint project.

To switch back to your own profile, click again on the name in the upper right corner (currently the name of the joint project), open the role selection and choose your own name / role (in the example the first option). You jump back to your own dashboard and can work again on your own profile.

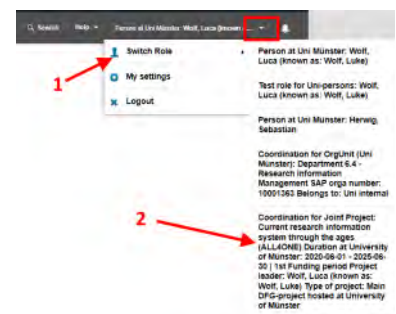


Image 1: Switch to the coordinating role

1 If you have more than one role in CRIS - e.g. an [user delegation](#) and / or an [organisational coordination role](#), you can re-arrange the order, in which the different roles are presented in this menu, in [your settings](#). Also, the role on top is your default role: This is the role you see first when logging in to CRIS.

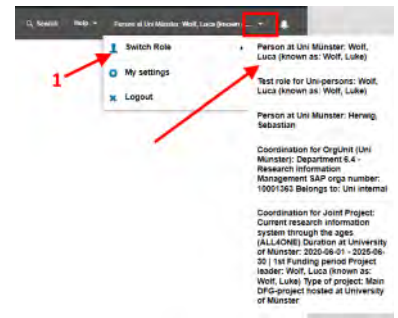


Image 2: Switch back to the own person role

Publications

In CRIS you collect and manage your publications that were made in a "University of Münster context". These publications are categorised into different [publication types](#). In the future the ULB will validate all publications collected in CRIS.

Your publications are connected via [cards](#) to you as well as Uni colleagues and organisations of the University of Münster. In the same way publications can be linked to e.g. [projects](#) or [dissertations](#).

Publication data can be entered into the system by yourself, someone with your [user delegation](#) or someone [coordination the data for your organisation](#).

Content

- [Types of publication](#)
- [Manual publication management](#)
- [Import from an online source](#)
- [Import from a file](#)
- [FAQ for managing publications](#)
 - [Side note: Managing duplicates](#)
 - [Side note: Claiming to be an author](#)
 - [Side note: Publication cloning](#)

Types of publication

Publications in CRIS are categorised into different types of publication by a combination of formal aspects. A publication type is selected when a publication entry is created. It determines which properties a publication has and how it is treated in statistics or on websites. The correct categorisation is therefore important. This is also a great potential for error, because the definition of publication types can differ, for example, between import sources. There are also differences between the old version of CRIS and the current version.

For this reason this chapter lists all current types of publication. If you have difficulties categorising your publications, please contact cris@uni-muenster.de.

101 of CRIS types of publication

With the update of CRIS to the current version, the publication types were also revised. This takes into account the requirements of [the KDSF standard](#), which standardises the presentation of and reports on research information. In addition, the experiences with previous publication types were analysed and frequent errors as well as queries from the faculties were taken into account. As a result, types of publication needed to be more detailed.

The first level of classification is the overall type combined with the source of a publication:

- Article in scientific journals, newspapers or magazines
- Book contribution
- Conference contribution
- ePaper / Preprint
- Monograph
- Edited collection
- Working paper, report, expertise or manual
- Objective, multimedia-based or online publication
- Other publication

This first level is broken down into a second, more detailed level. The categories of the first level are shown in the grey rows in the list below. When editing publications in CRIS masks, this first level is used for preselection (e.g. when manually creating a new publication) or visual menu guidance (e.g. subdividing drop-down-menus).

The second level of classification specifies the detailed type of publication and thus allows a better picture of the contents. This detailed classification can also be used for grouping publication in lists.

For example, an article in a scientific journal can be a "review" or "research article". A publication in the context of a conference can be, for example

- either a report on this conference (of the type "conference report (journal)")
- or the publication of one's own conference contribution (of the type "Abstract in journal (conference)").

These subtypes can be actively selected in the selections or drop-down-menus. For file imports, the publication types from the import sources are matched to CRIS subtypes if possible. When editing your data in the CRIS masks, the selected publication type controls which properties are mandatory for this publication.

In addition, there is an "undefined publication type" if a publication type could not be assigned e.g. during a data import. With the help of the existing, sometimes rough information from the import source, you can assign the correct publication type in the CRIS masks and thus avoid incorrect entries.

List of publication types and their definition

Article in scientific journal, newspaper or magazine	Text contribution published in a periodically or continuously appearing journal.
Research article (journal)	Scientific / Research article about the author's own research in a journal (original work).
Review article (journal)	Overview in a journal, summarising scientific literature about a topic and describing the state of research.
Legal commentary (journal)	Legal commentary in form of a journal article.
Bibliography (journal)	A bibliography is a systematic list of publications. It may be commented or annotated.
Edition of primary sources (journal)	A scholarly edition of primary sources, e.g. a corpus, is understood as a publication of historic or cultural sources with a substantial contribution of the author. This type also contains academic music editions.

Review (journal)	Critical appraisal of an opus, sometimes more than one, in form of a journal article.
Conference report (journal)	Report about a scientific conference in a journal.
Editorial (journal)	A text which is written by or on behalf of the editor or publisher, which represents the opinion of the editor / editorial board.
Letter to the editor (journal)	Communication to the editor published in a journal.
Non-scientific contribution (journal)	Non-scientific contribution to a journal or journalistic contribution to a newspaper, weekly magazine or another periodical.
Book contribution	A book contribution is a chapter or a section of an edited collection. This type also includes encyclopedia articles and legal commentaries.
Research article (book contribution)	Scientific / Research article about the author's own research in an edited collection (original work).
Review article (book contribution)	Overview in an edited collection summarising scientific literature about a topic and describing the state of research.
Legal commentary (book contribution)	Legal commentary in an edited collection.
Bibliography (book contribution)	A bibliography is a systematic list of publications. It may contain comments or annotations.
Edition of primary sources (book contribution)	A scholarly edition of primary sources, e.g. a corpus, is understood as a publication of historic or cultural sources with a substantial contribution of the author. This type also contains academic music editions.
Review (book contribution)	Critical appraisal of an opus, sometimes more than one, in an edited collection.
Conference report (book contribution)	Report about a scientific conference published in an edited collection.
Entry in encyclopedia (book contribution)	Article in an encyclopedia.
Editorial (book contribution)	A text which is written by or on behalf of the editor or publisher, which represents the opinion of the editor / editorial board.
Pre- / postface in edited collection	Contribution to an edited collection prior to the main text (preface), as well as after this (postface).
Pre- / postface in monograph	Contribution to a monograph prior to the main texts (preface), as well as after this (postface).
Conference contribution	Conference contributions published as texts as well as scientific posters presented at conferences.
Research article in journal (conference)	Scientific / Research paper that was presented on a conference and was published as a journal article.
Research article in edited proceedings (conference)	Scientific / Research paper that was presented on a conference and was published e.g. in conference proceedings or in an edited collection.

Research article in digital collection (conference)	Scientific paper that was presented on a conference and was published as ePaper.
Abstract in journal (conference)	Short text that summarises a presentation at a conference and was published as a journal article.
Abstract in edited proceedings (conference)	Short text that summarises a presentation at a conference and was published e.g. in conference proceedings or in an edited collection.
Abstract in digital collection (conference)	Short text that summarises a presentation at a conference and was published as ePaper.
Poster	Conference posters are visual presentations of scientific findings that have been publicly presented as posters at a conference.
Article or preprint in digital collection (fka ePaper / Preprint)	Research / scientific article that is published in a digital / online scientific repository or database e.g. arXiv.org (formerly known as ePaper). This category also includes preprints. For articles published in an online version of a scientific journal, please use "Research article (journal)".
Research article in digital collection	Research / scientific article about the authors' own research (original work) published in a digital / online collection, e.g. in a repository. For articles published in an online version of a scientific journal, please use "Research article (journal)".
Review article in digital collection	Overview summarising scientific literature about a topic and describing the state of research. Published in a digital / online collection, e.g. in a repository.
Legal commentary in digital collection	Legal commentary. Published in a digital / online collection, e.g. in a repository.
Bibliography in digital collection	A bibliography is a systematic list of publications. It may be commented or annotated. Published in a digital / online collection, e.g. in a repository.
Edition of primary sources in digital collection	A scholarly edition of primary sources, e.g. a corpus, is understood as a publication of historic or cultural sources with a substantial contribution of the author. This type also contains academic music editions. Published in a digital / online collection, e.g. in a repository.
Review in digital collection	Critical appraisal of an opus, sometimes more than one. Published in a digital / online collection, e.g. in a repository.
Conference report in digital collection	Report about a scientific conference. Published only in a digital format / online, e.g. in an digital repository or an online proceedings database.
Entry in encyclopedia in digital collection	Article in a digital / online encyclopedia.
Editorial in digital collection	A text which is written by or on behalf of the editor or publisher, which represents the opinion of the editor / editorial board. Published in a digital / online collection, e.g. in a repository.
Letter to the editor or pre- / postface in digital collection	Communication to the editor or pre- / postface to another work. Published in a digital / online collection, e.g. in a repository.
Monograph	A monograph is a book written by a single or multiple authors dedicated to a specific scientific topic. This type also comprises maps, exhibition catalogues, and translations if the latter is considered as substantial research achievement.
Book (monograph)	Scientific book in form of a monograph.
Text book (monograph)	Text book for academic teaching in form of a monograph.
Bibliography (monograph)	A bibliography is a systematic list of publications. It may be commented or annotated.

Edition of primary sources (monograph)	A scholarly edition of primary sources, e.g. a corpus, is understood as a publication of historic or cultural sources with a substantial contribution of the author. This type also contains academic music editions.
Exhibition catalogue (monograph)	Exhibition catalogue in form of a monograph.
Maps (monograph)	Cartographic material in form of a monograph.
Translation of a monograph	Scholarly translation of a monograph.
Edited collection	Book / Collection that has been edited by one or more persons. It contains book contributions by different authors in chapters or essays/articles. This type also includes commemorative publications and legal commentaries (either loose-leaf collection or bound book), conference proceedings, exhibition catalogues, and maps.
Book (edited collection)	Scientific book in form of an edited collection.
Text book (edited collection)	Text book for academic teaching in form of an edited collection.
Legal commentaries, bound book or loose-leaf-collection	Legal commentaries (bound book or loose-leaf-collection) in form of an edited collection.
Conference proceedings	Edited collection containing conference papers.
Exhibition catalogue (edited collection)	Exhibition catalogue in form of an edited collection.
Maps (edited collection)	Cartographic material in form of an edited collection.
Commemorative publication	Edited collection honoring a respected person, or book published for an anniversary containing contributions from different authors.
Special issue of a journal	A special issue of a journal edited by one or more persons. It contains contributions from different authors about a specific topic or a conference.
Thesis (doctoral or post-doctoral)	Qualification theses include doctoral and habilitation theses: a dissertation is a scientific work needed for the completion of a doctorate (PhD) degree, a habilitation is a scientific work needed for receiving the <i>venia legendi</i> .
Working paper, report, expertise or manual	A working paper is a public scientific publication that is issued either by the institution where the research takes place, or was made on behalf of an institution. Also known as research paper, research memorandum or discussion paper. The difference with a preprint is that a working paper is published in an institutional series. This type also contains surveys as well as project reports, scientific expertises and technical papers.
Working paper	A working paper is a public scientific publication that is issued either by the institution where the research takes place, or was made on behalf of an institution. Also known as research paper, research memorandum or discussion paper. The difference with a preprint is that a working paper is published in an institutional series. This type also contains surveys.
Project report	Published report about interim or final results of a funded project, commonly addressed to the funder.
Expertise or position statement	Commissioned expertise or position statement which is published.
Technical specification or manual	Technical document with detailed descriptions or booklet with operating instructions.

Objective, multimedia-based or online publication	Non-textual work or internet publication.
Web publication (blog article)	Scientific text contribution on the internet, usually a blog post.
Website (publicly available)	Set of own related web pages for a specific academic topic.
Moving pictures (film or animation)	Scientific representation in form of a movie, video, animation or simulation.
Picture (single picture)	A digital or physical visual scientific representation other than text, e.g. pictures and photographs of objects, paintings, printings, drawings, diagrams.
Audio contribution	Result of scientific work presented as an audio contribution, usually on the radio or as podcast or on e.g. a CD-Rom.
Music notation	Scientific description of music parameters as tone pitch, duration, volume, or colour by visual means.
Artifact (model, prototype, exhibit)	Objective work that has been publicly presented as result of scientific work by its maker.
Other publication	The work can not be assigned to one of the types available here. If applicable, classification may take place after addition of further data.
Erratum	Correction of a scientific publication that has been published in the same medium as the original work.
Other scientific publication	The work can not be assigned to one of the types available here, however, it is categorised as scientific. If applicable, classification may take place after addition of further data.
Other non-scientific publication	The work can not be assigned to one of the types available here, however, it is categorised as non-scientific. If applicable, classification may take place after addition of further data.
Publication type could not be assigned	The work could not be assigned automatically to one of the available types during migration from C4. Classification must be performed manually, additional data may be required.

The naming of some publication types were revised in September 2022 and March 2023. If you notice any discrepancies, please inform us: cris@uni-muenster.de

Manual publication management

Manual data entry and administration means entering information directly into editing masks. This way you can create new publications as well as edit existing publications. The editing mask is always the same, but differs slightly according to the [type of publication](#).

By the way: You can copy text elements such as titles or the list of authors from other documents such as Word or PDF. To do this, select the text section in the original document, copy it (e.g. using key combination Ctrl-C) and then paste the copied text into the text field in the editing mask (e.g. using key combination Ctrl-V).

Content

- [Manage publications](#)
 - [Editing an existing publication](#)
 - [Add a new publication](#)
- [Edit the details of a publication](#)
 - [Key information](#)
 - [Publication details](#)
 - [Author information](#)
 - [Abstract & Keywords](#)
 - [Language-related information](#)
 - [Comments](#)
 - [Thematic classification](#)
 - [Related Content](#)
 - [Research infrastructure](#)
 - [Please check for duplicates](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of publications](#)
 - [Visibility of your publication](#)

Manage publications

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Publications".

Editing an existing publication

A publication already existing in CRIS can be accessed:

- by clicking "Edit" at a publication entry in the list view (Image 1a)
- or by clicking the publication entry's title and then choosing "Edit" in the upper right corner of the following publication summary (Image 1b)

In the editing mask you can now edit the content of the publication (for details see below).

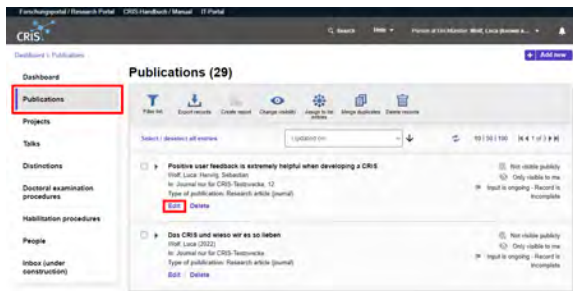


Image 1a: Edit via list view

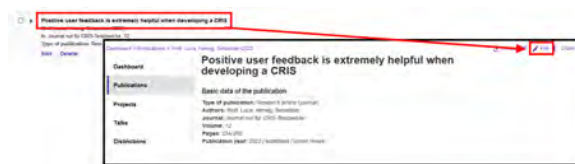


Image 1b: Edit via summary

Add a new publication

A new publication can be added by clicking "Add new" in the upper right corner when you are on a list view page. Just click on the plus icon and choose "Publication". A new mask will open.



Image 2: Add a new publication

Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

When the new mask for the next step opens, please check if "Create manually" is selected. If not, please select this option.

For the manual creation of a publication entry you choose now the [type of this specific publication](#). The selected type will control the following editing mask and show necessary information - e.g. a journal article will need a journal whereas a book needs a publisher. You see a short description of each publication type next to the option.

After selecting a publication type you are directed to the editing mask.

In the editing mask, you can of course correct the chosen publication type - just choose another option from the drop-down-menu on top of the tab "Key information". Necessary information in the mask will be changed accordingly.

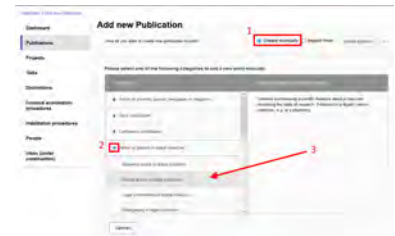


Image 3: Select the type of publication

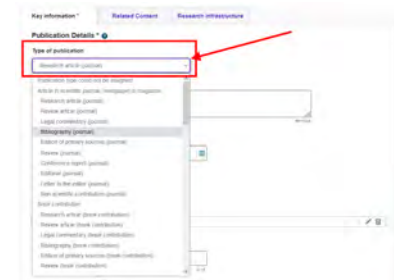


Image 4: Correct type of publication

Edit the details of a publication

The editing mask for publications has four sections / tabs:

- Key information
- Thematic classification
- Related Contents
- Research infrastructure

These information have to be edited for each publication. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics and may vary based on the [type of publication](#):

Publication details

- **Type of publication:** Please check if the selected type is correct or change the type accordingly
- **Original title of publication:** Here the original title is needed

- When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that it may be a duplicate. For further information, see [Side note: Managing duplicates](#)
- **Publication year:** Please enter the publication year
- **Publication date:** If known to you, please enter the exact publication date
 - Imperia sorts publications according to their publication date. If no publication date is set for a publication in CRIS, Imperia assumes the date "01.01.YYYY" for the publication year. If you want to influence the sorting in Imperia, please enter a publication date in addition to the publication year
- **Publication is peer reviewed:** State if this publication was peer reviewed before publication
- Depending on the type of publication, you need further information on e.g. a journal or publisher:
 - Journal contributions need to be linked to a (**scientific**) journal.
 - To do this, please click on the white-plus-on-blue icon and select a journal from the system's journal list. If necessary add a new journal via blue-plus-on-white
 - Many journals have more than one ISSN (eISSN for online and pISSN for print issues). A linking ISSN is a "meta ISSN". Please note at least eISSN and / or pISSN for this journal in their fields
 - If you searched, but cannot find an ISSN for this journal, please note NNNN-NNNN as ISSN-L. In some cases, a journal does have any ISSN. Please note XXXX-XXXX for these cases
 - Official abbreviations and ISSNs can be found via e.g. NLM Catalog <https://www.ncbi.nlm.nih.gov/nlmcatalog/journals>, ZDB catalog <https://zdb-katalog.de/index.xhtml> or ISSN portal <https://portal.issn.org/>
 - Book contributions ask for details on the book the contribution was published in. Please write book title and editors into the text fields. Also books like monographs have to be linked to their **publisher**
 - The book's **publisher** has to be related using the white-plus-on-blue icon. Select a publisher from the system's publisher list. If necessary add a new publisher via blue-plus-on-white
 - If this book was not published by a "regular" publisher but by e.g. an university or another organisation, please relate the book to "*Selbstverlag / Eigenverlag / Self-publishing*"
 - Published by organisation:** Sometimes books etc. are not distributed by a publisher, but by an organisation - e.g. an association, a project team, a ministry or a research institute. Because these organisations are not included in publishing lists, there are often problems with evaluations. Therefore, enter the name of the publishing organisation in the text field and relate "*Selbstverlag / Eigenverlag / Self-publishing*" as the publisher
 - If you are importing publications or they still originate from the old CRIS, *Publiher from import source* provides additional information, which you can use to search for and relate the publisher
 - Other publication types like conference contributions or pieces of art ask for an event in which context the publication was presented
 - If you do not know the country, please choose "Nicht spezifiziert / Unspecified"
 - For online / virtual events, please choose "Online" as a country
- Other important publication attributes:
 - Volume:** Mandatory for status "published". Please enter only the number or code of the VOLUME, without additions like "Vol." or "no."
 - Issue:** May be empty as not every journal does issues. Please enter only the number or code of the ISSUE, without additions like "Issue" "I." or "no."
 - Start page / End page:** Only for printed publications - like printed journals or books
 - Article number:** Often a number like "793115". It may be part of the DOI. Mainly used in online journals (as alternative to start / end pages), but also some printed journals
- **Reference to full text:**
 - Here you can add a DOI and / or the URL to full text
 - Please pay attention to adding e.g. the DOI link to the DOI field to make sure that it will be presented correctly in your online profile
 - Please enter a valid DOI. A valid DOI starts with 10. - e.g. *10.1000/123456* or *10.1038/issn.1476-4687*. Do not enter additional information like *https://dx.doi.org/* or *DOI:*. You can look up a DOI after entering at least title, publication year and last name of the lead / first author. Plus ISBN (for books / book contributions) or journal name or ISSN (for journal contributions)
 - Please remember to check the box for **open access publication** when applicable

The image shows a screenshot of a web form titled "Key information" for a publication. The form is divided into several sections:

- Publication Details:** Includes fields for "Title of publication", "Original title of publication", "Publication year", "Publication date", and "Publication is peer reviewed".
- Journal:** Includes fields for "Journal name", "ISSN", "Start page", "End page", and "Initial number".
- Reference to full text:** Includes a "DOI" field and a "URL to full text" field.
- Author information:** Includes an "Author" field, an "Affiliation" field, and a section for "Assign authors at University of Münster" with a table for "Name" and "Organisation".
- Affiliations of co-authors outside the University of Münster:** Includes a field for "Affiliation of co-authors".
- Abstract & Keywords:** Includes an "Abstract" field and a "Keywords" field.
- Language-related information:** Includes fields for "Language in which the publication is written" and "Language of translated title".

At the bottom of the form, there are buttons for "Cancel", "Save", and "Save & Close".

Image 5: Tab "Key information" of a publication

Author information

- **Authors:** In the text field all authors have to be listed, in exactly the same way as on the publication - no matter if they are affiliated to the University of Münster:
 - Names have to follow the order according to the publication: "lead / first author; second author; (...); last author"
 - Please enter the authors' names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2" (or "last name 1 comma space initial 1 semicolon space last name 2 comma space initial 2")
 - Check the box if author is an organisation / group

- **Publication created with contribution of University of Münster:** If this publication was published with at least one active University of Münster affiliation, please answer "yes". For example: If you published this publication before working at University of Münster and no other University of Münster author was involved, please answer "no"
- **Assign authors at University of Münster:** Use the plus icon to add University of Münster affiliated authors. Only after a person affiliated to the University of Münster is added as an author, CRIS "knows" about this person's contribution. The order of the related University of Münster authors in this menu does not give any information if the related University of Münster persons were the first / second / etc. author:
 - You are related by default when adding a new publication
 - The system will automatically relate your first [card](#). This should be your current position - please check your [personal profile](#) if this is correct
 - Of course you can also select an ended card if the publication was done during a former University of Münster position
 - If you want to relate another card than the one automatically related, just remove this one from the list and choose another one using the search function
 - ⚠ When you are working via [delegation](#) for another user, this person will be automatically connected to this entry. But if you are working in a [coordinating role for an organisation](#), no person will be connected! You have to manually add a person to this entry via the white-plus-on-blue-button (see below)
 - Other authors affiliated to the University of Münster can also be found using the search function. Please relate all persons affiliated to the University of Münster involved (e.g. your colleague):
 - Click on the white-plus-on-blue icon
 - Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
 - If a person has multiple [cards](#), please make sure to choose the correct one
 - If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

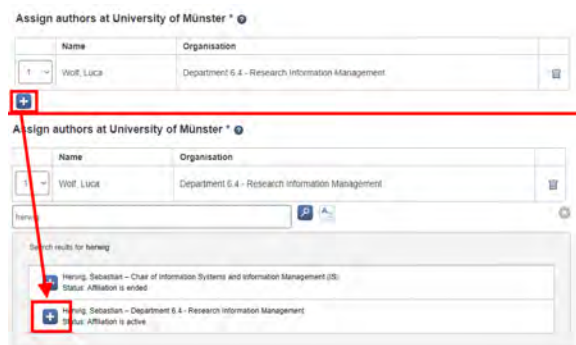


Image 6: Assign authors

- **Affiliations of co-authors outside the University of Münster:** Authors from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university)

Abstract & Keywords

- **Summary / Abstract:** Please enter the abstract in the original language of the publication. Please do not use html, markup, LaTeX, ... tags
- **Keywords:** Describe the topic of your publication with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

Language-related information

Here you can specify the original language of the publication and translation details if necessary.

Comments

Only visible to you (and other persons allowed to edit this publication). Please feel free to use this field for notes.

Thematic classification




From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications for this publication on the 2nd tab "Thematic classification".

For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter publications published before 2024, you can also (additionally) relate the old core profile areas. For publications published 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

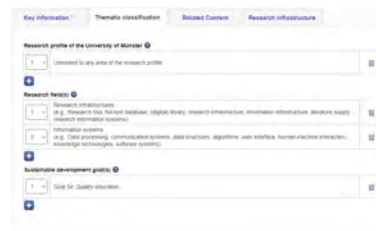


Image 7: Thematic classification

Related Content

On tab number 3 you can relate other CRIS content to your publication which is connected to this publication. Please use the plus icon to search for and related this content:


- **Projects from which the publication originates:** If your publication is based e.g. on the results from a project, please assign this project here
- **Talks the publication is presented with:** If you talked publicly about your findings e.g. on a conference, you can connect talk and publication
- **Doctoral examination procedures from which the publication originates:** If you published the findings of your doctoral examination procedure, you can relate your doctoral examination procedure here
- **Habilitation procedures from which the publication originates:** If you published the findings of your habilitation procedure, you can relate your habilitation procedure here
- **Distinctions received for this publication:** Did you receive an award for your publication or your work connected to this publication? Please assign here all received distinctions / nomination or scholarships

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.



Note: Relations work both ways

If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

 Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Research infrastructure

Please relate the research infrastructure (e.g. laboratory equipment, high performance computer) of the University of Münster, which is used to obtain the research results presented in the publication. Currently, only the HPC cluster "PALMA" can be chosen.

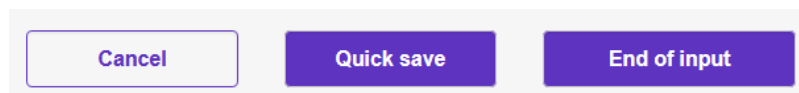
Please check for duplicates

Please check if your data is already in CRIS and try to avoid duplicates. More information can be found in the [chapter on duplicates](#).

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your publication. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of publications

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right - if necessary, scroll down in the new window, see dashed line). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [statuses](#) of publications may vary, depending on the [type of publication](#). In this example we inspect the statuses of a research article in a journal:

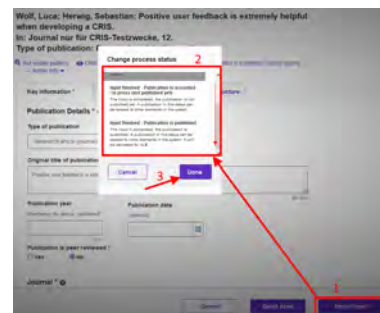


Image 8: Manage status of an entry

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries - no matter if added manually or imported. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Input finished - Publication is submitted / under review:** When you submitted your article which is now under review and not published yet, you need to choose this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is accepted / in press (not published yet):** If you want to indicate that your publication was accepted but is not officially published yet, this is the status to choose. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is published (ready for validation by ULB):** Please choose this status if your publication has been published / is available to the public. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. A publication in this status is automatically visible. Also, this status is a signal to the ULB that this entry is ready for additional validation
- **Validation by the ULB:** ULB staff will control all formal criteria of a valid publication and check e.g. if there are duplicates of this entry in the system. The validation does not change the visibility of the record for e.g. the [research portal](#). Its main purpose is assuring a high quality of all entries. The following status values are controlled by the ULB:
 - **Under validation by ULB:** A ULB staff member is assessing the information for this publication. From now on you can no longer edit this publication's details
 - **Under validation - Inquiry from ULB:** The ULB staff member needs further information from you. You have temporary editing rights to add the inquired details, e.g. for correcting a spelling mistake in the title
 - **Publication is validated - Publication process is finished:** Validation by ULB is finished

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the publication year is missing for the status "Input finished - Publication is published":



Image 9: Missing mandatory information

Visibility of your publication

The **visibility** of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠️ To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the **data entry** for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person
- From status "Input finished - Publication is published" on, a publication is by default always publicly and internally visible

i After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

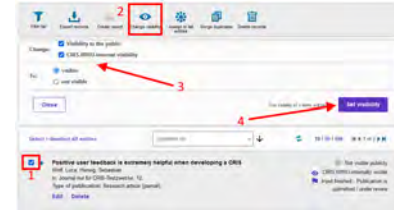


Image 10: Manage visibility of an entry

Import from an online source

CRIS allows to import publication data from different online sources:

- Scopus
- PubMed
- Web of Science Lite (the University of Münster has only a limited WoS license so that CRIS can only import journal articles with their basic information)
- ORCID (⚠️ ORCID import is possible but data quality is often insufficient and needs more manual corrections)

You do not need an account for one of these data sources. CRIS will search their databases based on e.g. your name.

The import process is done in steps:

Content

- [Manage publications](#)
 - [Editing an existing publication](#)
- [Import publications from an online source](#)
 - [Finalise imported publications](#)
 - [Key Information](#)
 - [Publication details](#)
 - [Author information](#)
 - [Abstract & Keywords](#)
 - [Language-related information](#)
 - [Comments](#)
 - [Thematic classification](#)
 - [Related Content](#)
 - [Research infrastructure](#)
 - [Please check for duplicates](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of publications](#)
 - [Visibility of your publication](#)

Manage publications

Please log in to CRIS. On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Publications".

Editing an existing publication

A publication already existing in CRIS can be accessed:

- by clicking "Edit" at a publication entry in the list view (Image 1a)
- or by clicking the publication entry's title and then choosing "Edit" in the upper right corner of the following publication summary (Image 1b)

In the editing mask you can now edit the content of the publication (for details see below).



Image 1a: Edit via list view



Image 1b: Edit via summary

Import publications from an online source

Please log in to CRIS. On the dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Publications".



Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

A new publication can be added by clicking "Add new" in the upper right corner when you are on a list view page. Just click on the plus icon and choose "Publication". A new mask will open.



Image 2: Add a new publication

When the new mask for the next step opens, please check if "Import from" plus "online source" is selected. If not, please select these options. *Please doublecheck, as a system bug might change the selection in the drop-down-menu from "online source" to "a file" or the other way around.*

Add new Publication



Image 3: Select Import from online source in the menu

When you are working on your own publications (or work as a [delegated user](#)), your name is preselected. If you have multiple [cards](#), you can select the one you want publications to be related to. If you are in a [coordinating role](#), you can select a name / card the imports should be related to. If you have chosen the wrong person / card, just remove your choice by using the dustbin icon next to the selected person in the next mask.

⚠ Please note that an import can only be done for one person / card at a time. If you want to relate more than one author affiliated to the University of Münster you have to do this in a later step.

Your import can be defined with the following options:

- Online source (Web of Science Lite, Scopus, PubMed plus ORCID)
 - We recommend to choose only one source per import. Multiple sources per import process may lead to duplicate entries
 - We recommend to use Scopus or PubMed
 - ORCID known to deliver insufficient data
 - For Web of Science Lite, the University Münster has only a limited license so that CRIS can only import journal articles with their basic information
- Two search boxes, connected by "and" with each other
 - Each search has two options: On the left is a text field where you can enter the text to be searched. On the right is a drop-down where you set the search field - in the example we look for "authors = Wolf" AND "title = Quo Vadis"
 - If you get no results, change / shorten your search parameters - e.g. by deleting punctuation marks and looking for "Quo vadis" (without question mark) instead of "Quo vadis?"
- In addition you can narrow down the publication years

Click the violet button "Search" to start the process.

"Clear" will reset the search parameters and let you start over. "Cancel" will close the mask and return to the last page.

Add new Publication

How do you want to create new publication records? Create manually Import from online sources !

Select a person
Wolf, Luca – Department 6.4 - Research Information Management
Status: Affiliation is active

Click 'Save' to save your current search settings, which will then be available in the drop down below.

Select saved search (optional)
Select search profile Save

General Search ORCID Search

Search publications for
Please search using your aliases, e.g. Smith J; Smith JD, and/or affiliation.

Web of Science Lite PubMed Scopus

Wolf L in field authors Search
support in field title Clear

* From year 2021 * to 2099

Image 4: Import menu and definitions

If CRIS does find results matching your parameters, all results will be collected. During this step CRIS checks whether a result is already in the system (see "Please check for duplicates" below). This can take some time, so please wait and do not refresh the page.

Results are presented in a list. The number of results is displayed on the left corner above the list. If there are more than 10 results, they are presented in pages you can browse through using the arrow buttons.

If a publication is ready for import, the right column of the list ("Actions to be performed") will suggest the action "Import and relate to you". Mark this publication by checking the box in front of the row (or "Select all records" to check all records on this page). Click on "Validate" on the bottom of the site. Check your selection again and click "Confirm". The selected publication are now imported and related to your profile.

Scopus (2)

<input type="checkbox"/>	Action to be performed	
<input type="checkbox"/>	The role of nutritional support in treatment of head and neck tumors: clinical case Mudunov A.M., Pak M.B., Wolf L.Y. Opuholi Golovoy i Sel: 86-94, 2022-01-01, ID:85147012028 Affiliation: Lapino Clinical Hospital/Nutriola LLC Link to Scopus	Import and relate to you
<input checked="" type="checkbox"/>	AI-based Decision Support for Sustainable Operation of Electric Vehicle Charging Parks Baumgart F., Dombetzki L., Kecht C., Wolf L., Keller R. Proceedings of the Annual Hawaii International Conference on System Sciences: 868-877, 2021-01-01, ID:8510685810 Affiliation: Fachhochschule Münster - Abteilung Steinfurt, Universität Bayreuth, Technische Universität München, Fraunhofer Institute for Applied Information Technology FIT Link to Scopus	Import and relate to you

Cancel Validate

Confirm and import

<input checked="" type="checkbox"/>	Source	Action to be performed
<input checked="" type="checkbox"/>	Scopus/SolVera	Import and relate to you

Cancel Confirm

Image 5: Manage search results and import selection

If a search result is already in the system, there are two possibilities:

- This publication was already imported and related to you. The right column of the result list states "Already your publication" and you can ignore this record
- A similar record was found (e.g. same title, different import source). This publication is marked as a possible duplicate. The column "Actions to be performed" will suggest possible actions, like "Possible duplicate - Needs validation" or "Create author relation to you". Mark this publication and follow the instructions. More details on duplicates can be found in [Side note: Managing duplicates](#).

The option "Change search parameters" allows for another search without leaving the mask.

After successfully importing your selection, you can jump to the publication list view to validate your new publication entries using the option "Validate your publications". Freshly imported publications are on top of the list view (when sorted by update).

"Done" will close the import mask and return you to your dashboard.

Image 8: Validate your publications

Finalise imported publications

Freshly imported publications are on top of the list view (when sorted by update). They are by default on status "Input is ongoing - Record is incomplete" and only visible to you.

The reason for this is that CRIS can only import information that are available in the import source. But from CRIS's point of view, these information are always incomplete. Missing information have to be added by you using the editing mask for the imported publications. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics and may vary based on the [type of publication](#):

Key Information

Most important are missing mandatory information on the first tab of the mask "key information":

Publication details

- **Type of publication:** The import process tries to match the sources' publication types to [CRIS publication types](#). Please check if the selected type is correct or change the type accordingly in the drop-down-menu on the top of the tab
- **Original title of publication:** Please check and correct the imported original title
- **Publication year:** Please check and correct the publication year
 - **Imperia** sorts publications according to their publication date. If no publication date is set for a publication in CRIS, Imperia assumes the date "01.01.YYYY" for the publication year. If you want to influence the sorting in Imperia, please enter a publication date in addition to the publication year
- **Publication is peer reviewed:** State if this publication was peer reviewed before publication
- **Original title of publication:** The text field shows the title as it was received during the import. Please check, if the title is correct
- Depending on the type of publication, you need further information on e.g. a journal or publisher:
 - Journal contributions need to be linked to a **(scientific) journal**. To do this, please click on the white-plus-on-blue icon and select a journal from the system's journal list. If necessary add a new journal via blue-plus-on-white
 - Many journals have more than one ISSN (eISSN for online and pISSN for print issues). A linking ISSN is a "meta ISSN". Please note at least eISSN and / or pISSN for this journal in their fields
 - If you searched, but cannot find an ISSN for this journal, please note NNNN-NNNN as ISSN-L. In some cases, a journal does have any ISSN. Please note XXXX-XXXX for these cases
 - Official abbreviations and ISSNs can be found via e.g. NLM Catalog <https://www.ncbi.nlm.nih.gov/nlmcatalog/journals>, ZDB catalog <https://zdb-katalog.de/index.xhtml> or ISSN portal <https://portal.issn.org/>
 - Book contributions ask for details on the book the contribution was published in. Please write book title and editors into the text fields. Also books like monographs have to be linked to their **publisher**
 - The book's **publisher** has to be related using the white-plus-on-blue icon. Select a publisher from the system's publisher list. If necessary add a new publisher via blue-plus-on-white

- **!** If this book was not published by a "regular" publisher but by e.g. an university or another organisation, please relate the book to "*Selbstverlag / Eigenverlag / Self-publishing*"
- **Published by organisation:** Sometimes books etc. are not distributed by a publisher, but by an organisation - e.g. an association, a project team, a ministry or a research institute. Because these organisations are not included in publishing lists, there are often problems with evaluations. Therefore, enter the name of the publishing organisation in the text field and relate "*Selbstverlag / Eigenverlag / Self-publishing*" as the publisher
- If you are importing publications or they still originate from the old CRIS, *Publisher from import source* provides additional information, which you can use to search for and relate the publisher
- Other types of publication like conference contributions or pieces of art ask for an event in which context the publication was presented
 - If you do not know the country, please choose "Nicht spezifiziert / Unspecified"
 - For online / virtual events, please choose "Online" as a country
- Other important publication attributes:
 - **Volume:** Mandatory for status "published". Please enter only the number or code of the VOLUME, without additions like "Vol." or "no."
 - **Issue:** May be empty as not every journal does issues. Please enter only the number or code of the ISSUE, without additions like "I." or "no."
 - **Start page / End page:** Only for printed publications - like printed journals or books
 - **Article number:** Often a number like "793115". It may be part of the DOI. Mainly used in online journals (as alternative to start / end pages), but also some printed journals

Author information

- **Authors:** In the text field all authors have to be listed, in exactly the same way as on the publication - no matter if they are affiliated to the University of Münster:
 - Names have to follow the order according to the publication: "lead / first author; second author; (...); last author"
 - Please enter the authors' names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2" (or "last name 1 comma space initial 1 semicolon space last name 2 comma space initial 2")
 - Check the box if author is an organisation / group
- **Publication created with contribution of University of Münster:** If this publication was published with at least one active University of Münster affiliation, please answer "yes". For example: If you published this publication before working at University of Münster and no other author affiliated to the University of Münster was involved, please answer "no"
- **Assign authors at University of Münster:** Use the plus icon to add authors affiliated to the University of Münster. Only after a person of the University of Münster is added as an author, CRIS "knows" about this person's contribution. The order of the related authors affiliated to the University of Münster in this menu does not give any information if the related University of Münster persons were the first / second / etc. author:
 - You are related by default when adding a new publication
 - The system will automatically relate your first **card**. This should be your current position - please check your **personal profile** if this is correct
 - Of course you can also select an ended card if the publication was done during a former University of Münster position
 - If you want to relate another card than the one automatically related, just remove this one from the list and choose another one using the search function
 - **!** When you are working via **delegation** for another user, this person will be automatically connected to this entry. But if you are working in a **coordinating role for an organisation**, no person will be connected! You have to manually add a person to this entry via the white-plus-on-blue-button (see below)
 - Other authors affiliated to the University of Münster can also be found using the search function. Please relate all persons affiliated to the University of Münster involved (e.g. your colleague):
 - Click on the white-plus-on-blue icon
 - Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
 - If a person has multiple **cards**, please make sure to choose the correct one
 - If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

Image 9: Tab "Key information" of a publication

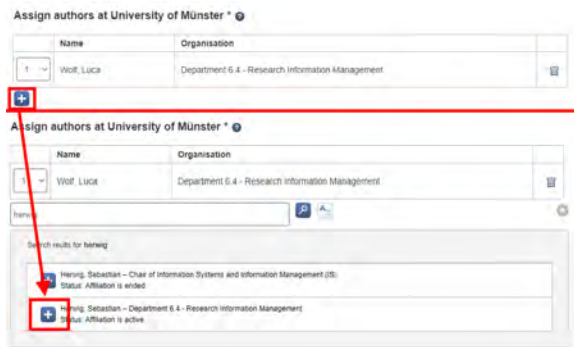


Image 10: Assign authors

- **Affiliations of co-authors outside the University of Münster:** Authors from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university)

Abstract & Keywords

- **Summary / Abstract:** Please enter the abstract in the original language of the publication. Please do not use html, markup, LaTeX, ... tags
- **Keywords:** Describe the topic of your publication with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

Language-related information

Here you can specify the original language of the publication and translation details if necessary.

Comments

Only visible to you (and other persons allowed to edit this publication). Please feel free to use this field for notes.

After editing all mandatory details you could save your work and leave the mask using the button "End of input in the lower right corner".

Thematic classification




From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

Unfortunately, the "standard classification" already stored in your [personal profile](#) (see "Thematic classification" for details) is not adopted during import.

You can nevertheless edit the classification directly under the 2nd tab "Thematic classification" in the publication mask.

For example, to select at least one area from the research profile of the University of Münster, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter publications published before 2024, you can also (additionally) relate the old core profile areas. For publications published 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

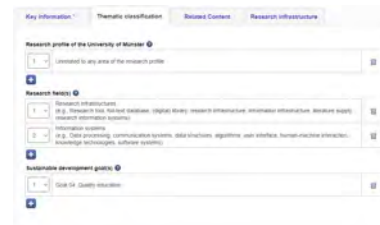


Image 11: Thematic classification

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

i If you link a second card to the imported publication, e.g. as an author (e.g. your own second card or that of a colleague), the "standard classification" stored in the [personal profile](#) is attached to the publication in this step.

If possible also check and complete information on the other tabs of the publication mask.

Related Content

On tab number 3 you can relate other CRIS content to your publication which is connected to this publication. Please use the plus icon to search for and related this content:

- **Projects from which the publication originates:** If your publication is based e.g. on the results from a project, please assign this project here
- **Talks the publication is presented with:** If you talked publicly about your findings e.g. on a conference, you can connect talk and publication
- **Doctoral examination procedures from which the publication originates:** If you published the findings of your doctoral examination procedure, you can relate your doctoral examination procedure here
- **Habilitation procedures from which the publication originates:** If you published the findings of your habilitation procedure, you can relate your habilitation procedure here
- **Distinctions received for this publication:** Did you receive an award for your publication or your work connected to this publication? Please assign here all received distinctions / nomination or scholarships

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.

Research infrastructure

Please relate the research infrastructure (e.g. laboratory equipment, high performance computer) of the University of Münster, which is used to obtain the research results presented in the publication. Currently, only the HPC cluster "PALMA" can be chosen.

Please check for duplicates

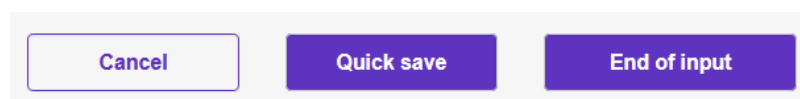
Please check if your data is already in CRIS and try to avoid duplicates. More information can be found in the [chapter on duplicates](#). CRIS will also check during the import process if a publication is already in the system, based on title, import sources and related University of Münster authors:

- Own publications from the same import source are marked as "Already your publication"
- Similar publications - e.g. same title, different import source - will be marked as duplicate. The system will suggest actions to be taken like "Create author relation to you". Please mark this publication in the import list separately and follow the instructions

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your publication. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of publications

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right - if necessary, scroll down in the new window, see dashed line). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [statuses](#) of publications may vary, depending on the [type of publication](#). In this example we inspect the statuses of a research article in a journal:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries - no matter if added manually or imported. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Input finished - Publication is submitted / under review:** When you submitted your article which is now under review and not published yet, you need to choose this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is accepted / in press (not published yet):** If you want to indicate that your publication was accepted but is not officially published yet, this is the status to choose. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is published (ready for validation by ULB):** Please choose this status if your publication has been published / is available to the public. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. A publication in this status is automatically visible. Also, this status is a signal to the ULB that this entry is ready for additional validation
- **Validation by the ULB:** ULB staff will control all formal criteria of a valid publication and check e.g. if there are duplicates of this entry in the system. The validation does not change the visibility of the record for e.g. the [research portal](#). Its main purpose is assuring a high quality of all entries. The following status values are controlled by the ULB:
 - **Under validation by ULB:** A ULB staff member is assessing the information for this publication. From now on you can no longer edit this publication's details
 - **Under validation - Inquiry from ULB:** The ULB staff member needs further information from you. You have temporary editing rights to add the inquired details, e.g. for correcting a spelling mistake in the title
 - **Publication is validated - Publication process is finished:** Validation by ULB is finished

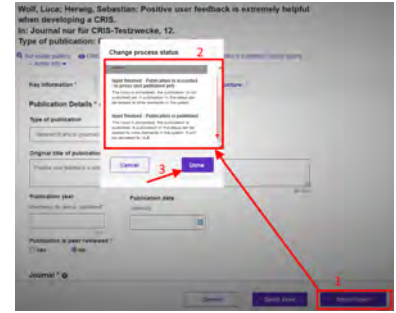


Image 12: Manage status of an entry

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the publication year is missing for the status "Input finished - Publication is published":



Image 13: Missing mandatory information

Visibility of your publication

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠️ To do this, all mandatory fields for the selected status have to be answered. To change an entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly

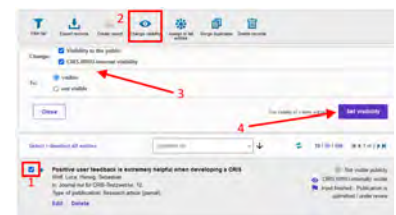



Image 14: Manage visibility of an entry

- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person
- From status "Input finished - Publication is published" on, a publication is by default always publicly and internally visible

 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Import from a file

CRIS supports the import of publications from files. File formats to be used are BibTeX (.bib) and Endnote. We recommend BibTeX (.bib). In these instructions, one BibTeX file was created with [Citavi 6 - for further information see the ULB](#). There you will find instructions on how to use Citavi. Another BibTeX file was created with the freeware tool Zotero. Both BibTeX files for importing into CRIS must follow the respective standard: Authors must be in the author field, titles in the title field and so on.

The import process is always done in steps:

Content

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Manage publications

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Publications".

Editing an existing publication

A publication already existing in CRIS can be accessed:

- by clicking "Edit" at a publication entry in the list view (Image 1a)
- or by clicking the publication entry's title and then choosing "Edit" in the upper right corner of the following publication summary (Image 1b)

In the editing mask you can now edit the content of the publication (for details see below).

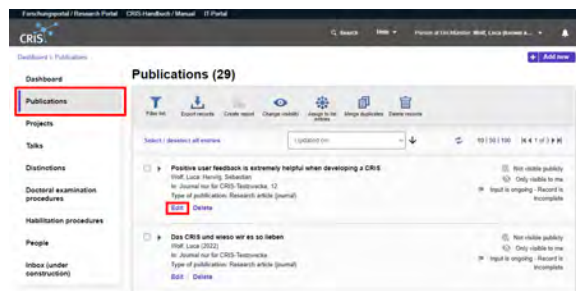


Image 1a: Edit via list view

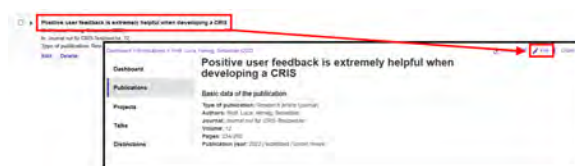


Image 1b: Edit via summary

Export publication data from Citavi

Citavi is a tool where you can manage e.g. your readings, references and your own publications. Your e.g. own publications can be exported from Citavi into a file format suitable for other reference management and knowledge organisation tools. And this export can also be used for importing your publication data to CRIS. In this example we will create a BibTeX (.bib) file for this purpose.

In Citavi open the "project" in which you manage your publication data and click on "file" on the upper left corner. Next, click on "Export" and (if you haven't defined any export templates yet) again on "Export..."

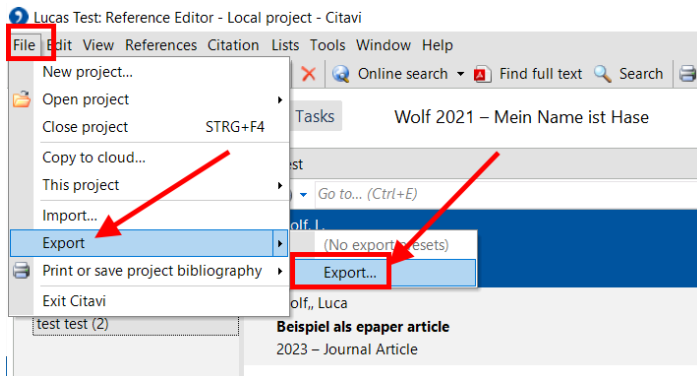


Image 2: Export menu in Citavi

You can follow the export wizard, jumping to the next step by "Next":

- Which references you you want to export? All or just the selected ones?
- Which format yo you want to export to? We decide for "BibTeX"

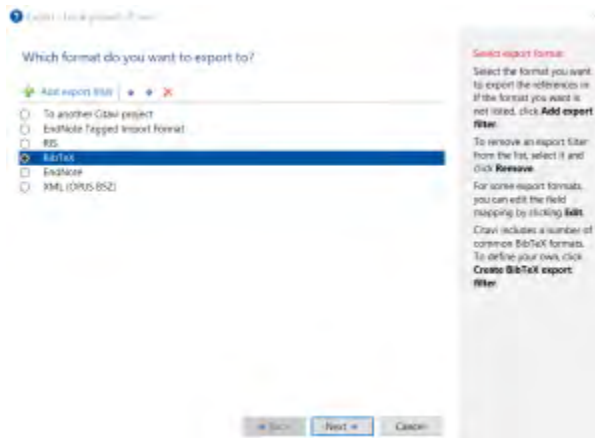


Image 3: Selecting BibTeX as file format in the export wizard

- Next set the saving path and name for your export file:
 - We want to save to text file. The path in the image below is just an example, you define your own path for saving
 - Under BibTeX export options, you UNCHECK „Place capital letters in braces" and "Use LaTeX notation", only checking the last option "Use URL package"

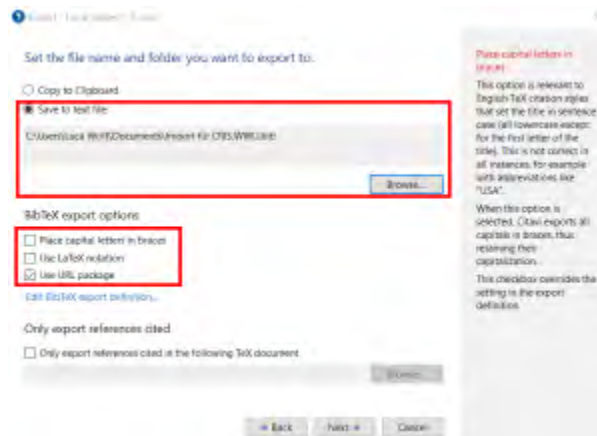


Image 4: Define export options in the wizard

- If you to save this export definition as a template, you can do this in the next wizard step
- With "Next" you start the export process and the file will be saved under the defined path
- You can now close the export wizard

Export publication data from Zotero

In its default setting for BibTeX, Zotero encloses words starting with capital letters in curly brackets, e.g. as `title = {{Mein} {Name} ist {Hase}}` instead of `title = {Mein Name ist Hase}` as needed for CRIS. The additional (red in the example) curly brackets are NOT deleted during the import to CRIS and will be displayed as "normal" part of the title. Different to Citavi (see image 4) you cannot "uncheck" a "curly bracket option" during export but have to define a background setting in Zotero. This new Zotero setting can of course be activated / deactivated any time.

The next screenshots are from a Windows system. Zotero menus, buttons and steps of the process may differ in Linux and macOS.

Preparing Zotero for exports without curly brackets

You have to do this step only one time - after that the new setting is saved and used for all following BibTeX exports.

- In Zotero, click on "Edit" "Preferences" right tab "Advanced" "Config Editor" in the bottom of this tab. Accept the following warning

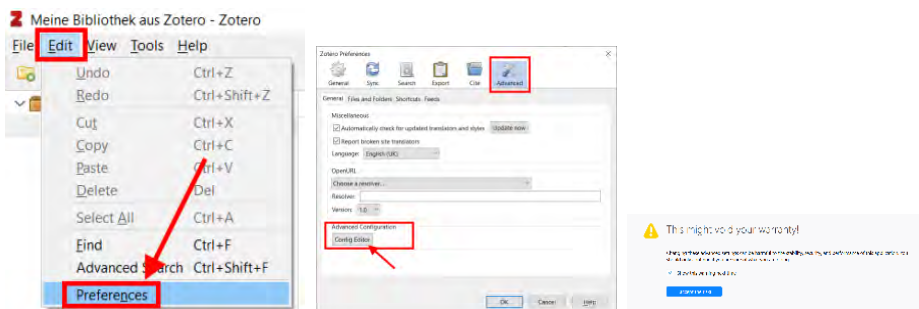


Image 5: Open hidden settings in the Config Editor

- With the Config Editor you can define settings not usable in the standard menus. You need to set up a new setting here. To do this, right click somewhere in the white area of the Config Editor. You will see a new menu
- In the new menu go to "New" and choose "Boolean"

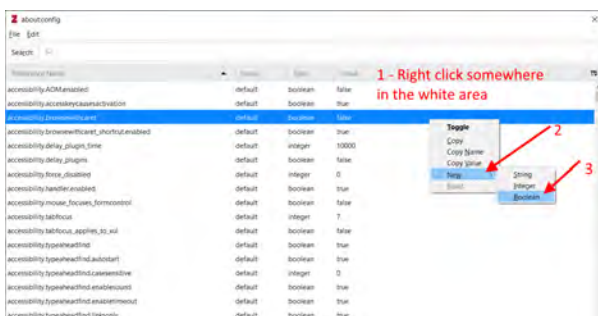


Image 6a: Define a new setting

- Copy `extensions.zotero.translators.BibTeX.export.dontProtectInitialCase` into the field and click OK
- Next choose `true` and again click OK

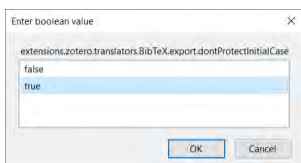


Image 6b: Define a new setting

- Now you can simply close the Config Editor, the new setting is saved and activated
- Finally close the Preference menu by clicking OK

(If you need the curly brackets back for other non-CRIS-exports, you can simply search for the new setting in the Config Editor, You can deactivate this setting by right clicking on it and then choosing "Toggle")

Export a BibTeX file

Zotero know several ways to start an export. You can either right click on a publication and choose "Export Item". Or right click a collection and choose "Export Collection". Or export your library via "File" "Export Library".

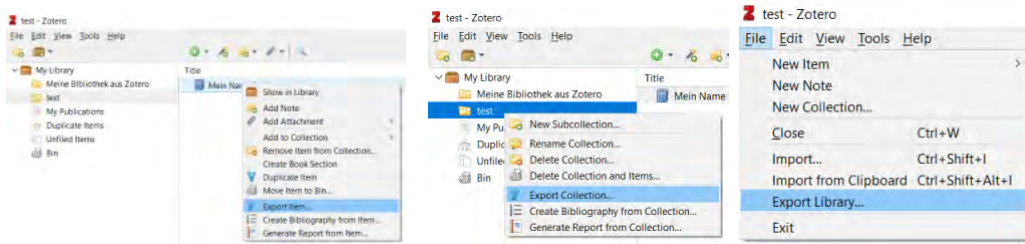


Image 7: Different ways to the export menu in Zotero

The following export menu is always the same. Choose "Format" BibTeX if necessary. You can ignore all other settings. Click "OK" and choose the path to save your file to. Depending on your operating system, you save this file by clicking "Save / Speichern".

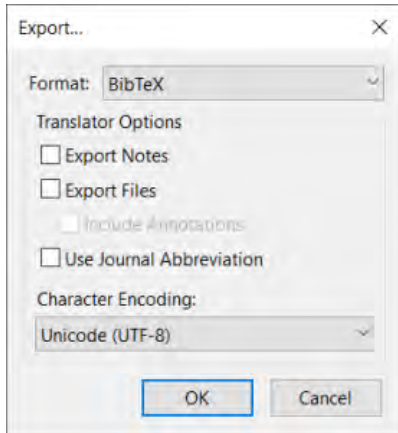


Image 8: Export menu

Import publications from a file

Please [log in to CRIS](#). On the dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Publications".

Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

A new publication can be added by clicking "Add new" in die upper right corner when you are on a list view page. Just click on the plus icon and choose "Publication". A new mask will open.



Image 9: Add a new publication

When the new mask for the next step opens, please check if "Import from" plus "a file" is selected. If not, please select these options. Please *doublecheck*, as a system bug might change the selection in the drop-down-menu from "online source" to "a file" or the other way around.



Image 10: Select Import from online source in the menu

When you are working on your own publications (or work as a [delegated user](#)), your name is preselected. If you have multiple [cards](#), you can select the one you want publications to be related to. If you are in a [coordinating role](#), you can select a name / card the imports should be related to. If you have chosen the wrong person / card, just remove your choice by using the dustbin icon next to the selected person in the next mask.

⚠ Please note that an import can only be done for one person / card at a time. If you want to relate more than one author affiliated to the University of Münster you have to do this in a later step.

To start the import process, click on the folder icon on the left. You can now select the file you created before in Citavi or Zotero.

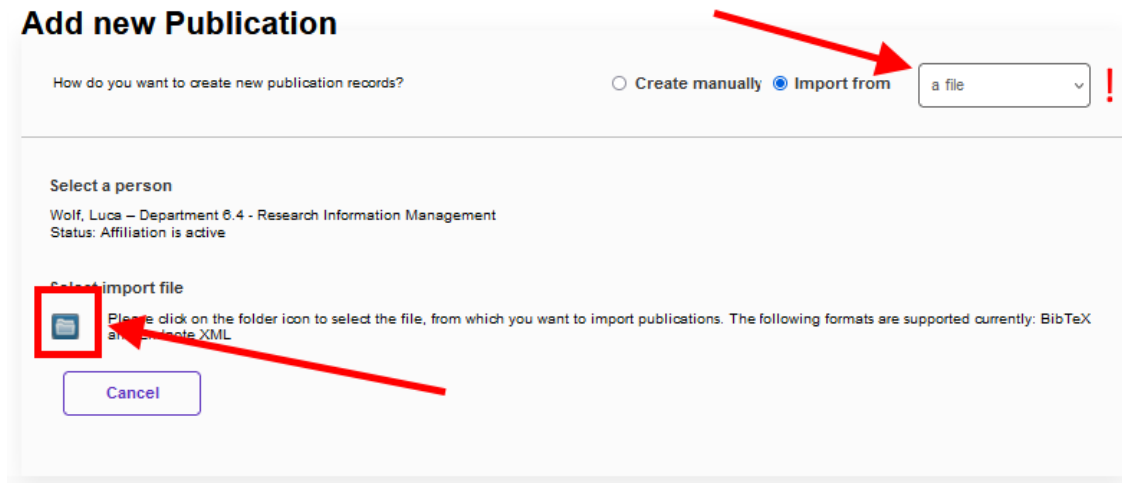


Image 11: Select import file

During this step CRIS checks whether an items from your file is already in the system (see "Please check for duplicates" below). This can take some time, so please wait and do not refresh the page.

If you want to use another file, select the new file using the folder icon next to the file name. The process will start over.

Publications found in the import file are presented in a list. The number of results is displayed above the list ("Number of entries"). If there are more than 10 results, they are presented in pages you can browse through using the arrow buttons.

If an import item is already in the system there are two possibilities:

- This publication was already imported and related to you. The right column of the result list states "Already your publication" and you can ignore this record
- A similar record was found (e.g. same title, different import source). This publication is marked as a possible duplicate. The column "Actions to be performed" will suggest possible actions, like "Possible duplicate - Needs validation" or "Create author relation to you". Mark this publication and follow the instructions. More details on duplicates can be found in [Side note: Managing duplicates](#).

If a publication is ready for import, the right column of the list ("Actions to be performed") will suggest the action "Import and relate to you". Mark this publication by checking the box in front of the row (or select all records by checking the box next to "Title"). Click on "Import Publication" on the bottom of the site. The selected publication are now imported and related to your profile.

After successfully importing your selection, you can jump to the publication list view to validate your new publication entries using the option "Validate your publications". Freshly imported publications are on top of the list view (when sorted by update).

"Done" will close the import mask and return you to your dashboard.



Image 12: Publikationen auswählen und importieren



Finalise imported publications

Freshly imported publications are on top of the list view (when sorted by update). They are by default on status "Input is ongoing - Record is incomplete" and only visible to you.

The reason for this is that CRIS can only import information that are available in the import source. But from CRIS's point of view, these information are always incomplete. Missing information have to be added by you using the editing mask for the imported publications. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics and may vary based on the [type of publication](#):

Key Information

Most important are missing mandatory information on the first tab of the mask "key information":

Publication details

- **Type of publication:** The import process tries to match the sources' publication types to [CRIS publication types](#). Please check if the selected type is correct or change the type accordingly in the drop-down-menu on the top of the tab
- **Original title of publication:** Please check and correct the imported original title
- **Publication year:** Please check and correct the publication year
 - **Imperia** sorts publications according to their publication date. If no publication date is set for a publication in CRIS, Imperia assumes the date "01.01.YYYY" for the publication year. If you want to influence the sorting in Imperia, please enter a publication date in addition to the publication year
- **Publication is peer reviewed:** State if this publication was peer reviewed before publication
- **Original title of publication:** The text field shows the title as it was received during the import. Please check, if the title is correct
- Depending on the type of publication, you need further information on e.g. a journal or publisher:
 - Journal contributions need to be linked to a (**scientific**) journal. To do this, please click on the white-plus-on-blue icon and select a journal from the system's journal list. If necessary add a new journal via blue-plus-on-white
 - Many journals have more than one ISSN (eISSN for online and pISSN for print issues). A linking ISSN is a "meta ISSN". Please note at least eISSN and / or pISSN for this journal in their fields
 - If you searched, but cannot find an ISSN for this journal, please note NNNN-NNNN as ISSN-L. In some cases, a journal does have any ISSN. Please note XXXX-XXXX for these cases
 - Official abbreviations and ISSNs can be found via e.g. NLM Catalog <https://www.ncbi.nlm.nih.gov/nlmcatalog/journals>, ZDB catalog <https://zdb-katalog.de/index.xhtml> or ISSN portal <https://portal.issn.org/>
 - Book contributions ask for details on the book the contribution was published in. Please write book title and editors into the text fields. Also books like monographs have to be linked to their **publisher**
 - The book's **publisher** has to be related using the white-plus-on-blue icon. Select a publisher from the system's publisher list. If necessary add a new publisher via blue-plus-on-white
 - **ⓘ** If this book was not published by a "regular" publisher but by e.g. an university or another organisation, please relate the book to "**Selbstverlag / Eigenverlag / Self-publishing**"
 - **Published by organisation:** Sometimes books etc. are not distributed by a publisher, but by an organisation - e.g. an association, a project team, a ministry or a research institute. Because these organisations are not included in publishing lists, there are often problems with evaluations. Therefore, enter the name of the publishing organisation in the text field and relate "**Selbstverlag / Eigenverlag / Self-publishing**" as the publisher
 - If you are importing publications or they still originate from the old CRIS, **Publisher from import source** provides additional information, which you can use to search for and relate the publisher
 - Other types of publication like conference contributions or pieces of art ask for an event in which context the publication was presented
 - If you do not know the country, please choose "Nicht spezifiziert / Unspecified"
 - For online / virtual events, please choose "Online" as a country
- Other important publication attributes:
 - **Volume:** Mandatory for status "published". Please enter only the number or code of the VOLUME, without additions like "Vol." or "no."

The screenshot shows the 'Key Information' tab of a CRIS publication mask. At the top, there is a header with the user's name and a message: 'Wolf, Luca; Herwig, Sebastian (2024). Positive user feedback is extremely helpful when developing a CRIS. In: Journal für CRIS-Testzwecke, 13. doi:10.1000/123456. Type of publication: Research article (journal)'. Below this, the 'Publication Details' section is visible, with the 'Type of publication' dropdown set to 'Research article (journal)'. The 'Original title of publication' field contains the text 'Positive user feedback is extremely helpful when developing a CRIS.'. The 'Publication year' is '2024' and the 'Publication date' is '01.01.2024'. The 'Publication is peer reviewed' checkbox is checked. The 'Original title of publication' field is identical to the one above. The 'Journal' field is empty, with a blue plus icon to its right. Below it, the 'Volume', 'Issue', and 'Page range' fields are also empty. The 'Abstract' field contains the text 'Positive user feedback is extremely helpful when developing a CRIS.'. The 'Keywords' field is empty. The 'Language-related information' section is at the bottom, with the 'Language in which the publication is written' dropdown set to 'English' and the 'Language of translated title' dropdown set to 'English'. At the bottom right, there are buttons for 'Cancel', 'Check data', and 'Save and publish'.

Image 14: Tab "Key information" of a publication

- **Issue:** May be empty as not every journal does issues. Please enter only the number or code of the ISSUE, without additions like "Issue "I." or "no."
- **Start page / End page:** Only for printed publications - like printed journals or books
- **Article number:** Often a number like "793115". It may be part of the DOI. Mainly used in online journals (as alternative to start / end pages), but also some printed journals

Author information

- **Authors:** In the text field all authors have to be listed, in exactly the same way as on the publication - no matter if they are affiliated to the University of Münster:
 - Names have to follow the order according to the publication: "lead / first author; second author; (...); last author"
 - Please enter the authors' names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2" (or "last name 1 comma space initial 1 semicolon space last name 2 comma space initial 2")
 - Check the box if author is an organisation / group
- **Publication created with contribution of University of Münster:** If this publication was published with at least one active University of Münster affiliation, please answer "yes". For example: If you published this publication before working at University of Münster and no other author affiliated to the University of Münster was involved, please answer "no"
- **Assign authors at University of Münster:** Use the plus icon to add authors affiliated to the University of Münster. Only after a person affiliated to the University of Münster is added as an author, CRIS "knows" about this person's contribution. The order of the related authors affiliated to the University of Münster in this menu does not give any information if the related University of Münster persons were the first / second / etc. author:
 - You are related by default when adding a new publication
 - The system will automatically relate your first [card](#). This should be your current position - please check your [personal profile](#) if this is correct
 - Of course you can also select an ended card if the publication was done during a former University of Münster position
 - If you want to relate another card than the one automatically related, just remove this one from the list and choose another one using the search function
 - ⚠ When you are working via [delegation](#) for another user, this person will be automatically connected to this entry. But if you are working in a [coordinating role for an organisation](#), no person will be connected! You have to manually add a person to this entry via the white-plus-on-blue-button (see below)
 - Other authors affiliated to the University of Münster can also be found using the search function. Please relate all persons affiliated to the University of Münster involved (e.g. your colleague):
 - Click on the white-plus-on-blue icon
 - Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
 - If a person has multiple [cards](#), please make sure to choose the correct one
 - If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

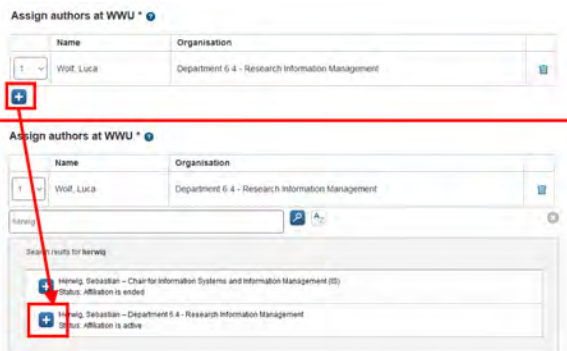


Image 15: Assign authors

- **Affiliations of co-authors outside the University of Münster:** Authors from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university)

Abstract & Keywords

- **Summary / Abstract:** Please enter the abstract in the original language of the publication. Please do not use html, markup, LaTeX, ... tags

- **Keywords:** Describe the topic of your publication with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

Language-related information

Here you can specify the original language of the publication and translation details if necessary.

Comments

Only visible to you (and other persons allowed to edit this publication). Please feel free to use this field for notes.

After editing all mandatory details you could save your work and leave the mask using the button "End of input in the lower right corner".

Thematic classification

From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

Unfortunately, the "standard classification" already stored in your [personal profile](#) (see "Thematic classification" for details) is not adopted during import.

You can nevertheless edit the classification directly under the 2nd tab "Thematic classification" in the publication mask.

For example, to select at least one area from the research profile of the University of Münster, proceed as follows:

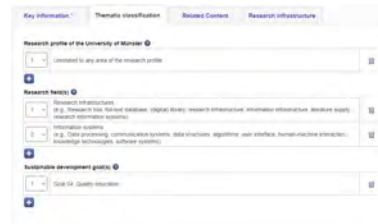


Image 16: Thematic classification

- Click on the white plus on blue background
- You can display the areas of the research profile either alphabetically or hierarchically (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter publications published before 2024, you can also (additionally) relate the old core profile areas. For publications published 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

If you link a second card to the imported publication, e.g. as an author (e.g. your own second card or that of a colleague), the "standard classification" stored in the [personal profile](#) is attached to the publication in this step.

If possible also check and complete information on the other tabs of the publication mask.

Related Content

On tab number 3 you can relate other CRIS content to your publication which is connected to this publication. Please use the plus icon to search for and related this content:

- **Projects from which the publication originates:** If your publication is based e.g. on the results from a project, please assign this project here
- **Talks the publication is presented with:** If you talked publicly about your findings e.g. on a conference, you can connect talk and publication
- **Doctoral examination procedures from which the publication originates:** If you published the findings of your doctoral examination procedure, you can relate your doctoral examination procedure here
- **Habilitation procedures from which the publication originates:** If you published the findings of your habilitation procedure, you can relate your habilitation procedure here
- **Distinctions received for this publication:** Did you receive an award for your publication or your work connected to this publication? Please assign here all received distinctions / nomination or scholarships

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.

Research infrastructure

Please relate the research infrastructure (e.g. laboratory equipment, high performance computer) of the University of Münster, which is used to obtain the research results presented in the publication. Currently, only the HPC cluster "PALMA" can be chosen.

Please check for duplicates

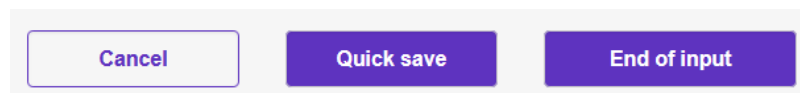
Please check if your data is already in CRIS and try to avoid duplicates. More information can be found in the [chapter on duplicates](#). CRIS will also check during the import process if a publication is already in the system, based on title, import sources and related University of Münster authors:

- Own publications from the same import source are marked as "Already your publication"
- Similar publications - e.g. same title, different import source - will be marked as duplicate. The system will suggest actions to be taken like "Create author relation to you". Please mark this publication in the import list separately and follow the instructions

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your publication. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information is missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of publications

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right- if necessary, scroll down in the new window, see dashed line). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status is missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [statuses](#) of publications may vary, depending on the [type of publication](#). In this example we inspect the statuses of a research article in a journal:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries - no matter if added manually or imported. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Input finished - Publication is submitted / under review:** When you submitted your article which is now under review and not published yet, you need to choose this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is accepted / in press (not published yet):** If you want to indicate that your publication was accepted but is not officially published yet, this is the status to choose. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Input finished - Publication is published (ready for validation by ULB):** Please choose this status if your publication has been published / is available to the public. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the data in this entry, but you can not change the status back to the step before. A publication in this status is automatically visible. Also, this status is a signal to the ULB that this entry is ready for additional validation

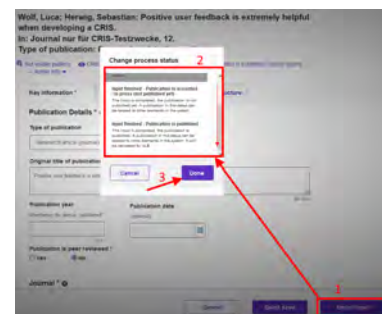


Image 17: Manage status of an entry

- **Validation by the ULB:** ULB staff will control all formal criteria of a valid publication and check e.g. if there are duplicates of this entry in the system. The validation does not change the visibility of the record for e.g. the [research portal](#). Its main purpose is assuring a high quality of all entries. The following status values are controlled by the ULB:
 - **Under validation by ULB:** A ULB staff member is assessing the information for this publication. From now on you can no longer edit this publication's details
 - **Under validation - Inquiry from ULB:** The ULB staff member needs further information from you. You have temporary editing rights to add the inquired details, e.g. for correcting a spelling mistake in the title
 - **Publication is validated - Publication process is finished:** Validation by ULB is finished

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the publication year is missing for the status "Input finished - Publication is published":



Image 18: Missing mandatory information

Visibility of your publication

The **visibility** of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

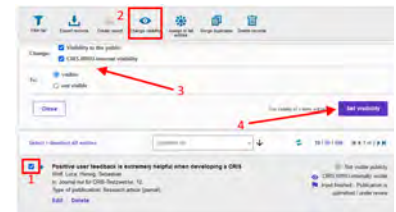


Image 19: Manage visibility of an entry

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the **list view** of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change an entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person
- From status "Input finished - Publication is published" on, a publication is by default always publicly and internally visible

i After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

FAQ for managing publications

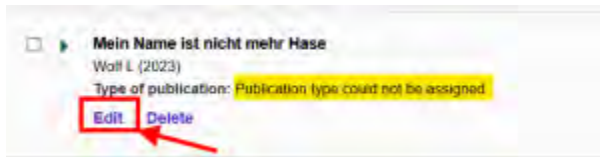
Content

- Why is there "Publication type could not be assigned" for my freshly imported publication?
- Why does CRIS tell me to check the journal / publisher of a publication? And what should I do about it?
- We published our work as a group. How can we indicate this?
- How can we show the position of the involved persons, e.g. first author or senior author?
- One of my publications is in CRIS but neither can I see it nor work on it. What do I have to do?
- My publication is not visible on my institute's profile page. What do I have to do?
- Why is it not possible to import all my publication data from e.g. Web of Science (WoS)?
- Why can't I use my ORCID iD to search for my publication in e.g. Scopus?

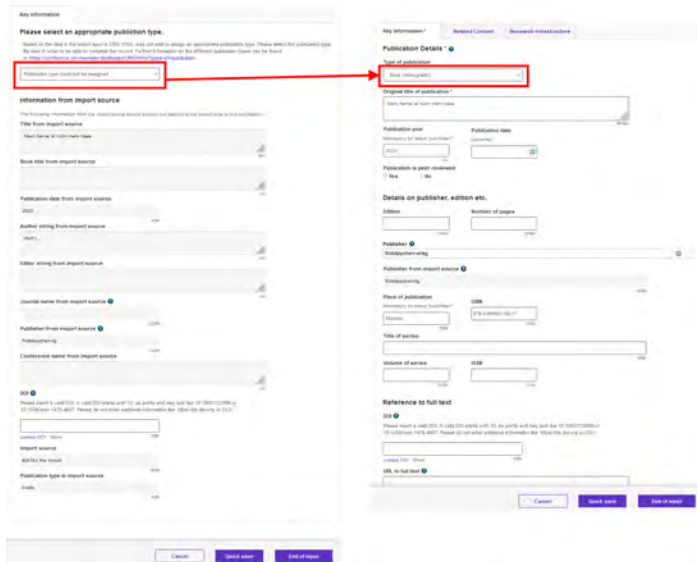
Why is there "Publication type could not be assigned" for my freshly imported publication?

Import online sources like Scopus or PubMed but also some file formats like BibTeX use their own publication categories. CRIS translates most of them to [CRIS publication types](#) during the import process. But sometimes this is not possible and CRIS is not able to assign a publication type. In this case, a freshly imported publication is marked as "Publication type could not be assigned" and you have to manage its publication type.

Just click on "Edit" in the [list view](#) row for this undefined entry.

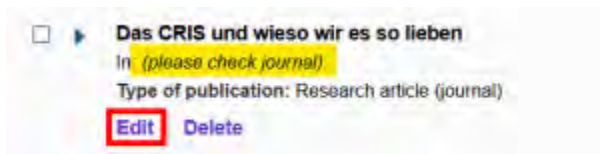


You will see a special mask, showing the key information for this imported publication entry as "read-only" information. This means you cannot change the details of the publication - except for the drop down menu at the start of the mask. Here you can select the correct [publication type](#) für this entry. The mask will change accordingly and you can now [work on the details of the publication](#).



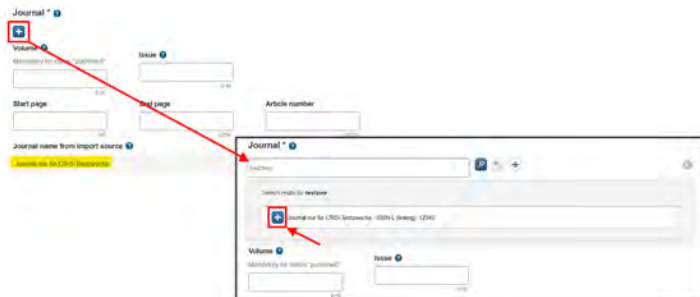
Why does CRIS tell me to check the journal / publisher of a publication? And what should I do about it?

Sometime you see the request to check the journal or publisher of a publication in the list view. This is often the case for older entries from the former CRIS system and imported entries. In such a case, please click on "Edit".




In the editing mask for this entry, you might see the journal / publisher name e.g. from the old CRIS version or from the import source as a read-only text information (see the yellow marking in the next image).

Now click on the white-plus-on-blue icon. A new mask will appear where you can search for the journal / publisher in the CRIS database. You relate the found journal / publisher to your publication by clicking the white-plus-on-blue icon in front of this journal / publisher entry,



If necessary add a new journal / publisher via the blue-plus-on-white icon on the right of this mask:

- Journal contributions need to be linked to a (**scientific**) journal.
 - To do this, please click on the white-plus-on-blue icon and select a journal from the system's journal list. If necessary add a new journal via blue-plus-on-white
 - Many journals have more than one ISSN (eISSN for online and pISSN for print issues). A linking ISSN is a "meta ISSN". Please note at least eISSN and / or pISSN for this journal
 - If you searched, but cannot find an ISSN for this journal, please note NNNN-NNNN as ISSN-L. In some cases, a journal does not have any ISSN. Please note XXXX-XXXX for these cases
 - Official abbreviations and ISSNs can be found via e.g. NLM Catalog <https://www.ncbi.nlm.nih.gov/nlmcatalog/journals> or ISSN portal <https://portal.issn.org/>
- Book contributions ask for details on the book the contribution was published in. Please write book title and editors into the text fields. The book's **publisher** has to be related using the white-plus-on-blue icon. Select a publisher from the system's publisher list. If necessary add a new publisher via blue-plus-on-white
 - Books like monographs have to be linked to their publisher using the white-plus-on-blue icon. Select a publisher from the system's publisher list. If necessary add a new publisher via blue-plus-on-white
 -  If this book was not published by a "regular" publisher but by e.g. an university or another organisation, please relate the book to "*Selbstverlag / Eigenverlag / Self-publishing*"

Best quick save (violet button on the bottom of the editing mask) your entry now to prevent data loss.

We published our work as a group. How can we indicate this?

When you published your work as a group, you can write the group's name to the Authors text field in the editing mask instead of listing all contributing persons. To indicate that a group was involved, check the option "Author is organisation / group" below the Authors text field.

persons. To indicate that a group was involved, check the option "Author is organisation / group" below the Authors text field.

Please keep in mind that you nevertheless have to relate all authors' [cards](#) from the University Münster to this publication.

How can we show the position of the involved persons, e.g. first author or senior author?

Currently it is not possible to add information in CRIS on the position of the authors (e.g. who is first author or senior author or corresponding author) or shared authorships.

Therefore please pay attention to how you note the authors involved in the Authors text field. Keep the order of the authors as it is on the publication itself

The sequence of the related authors from the University Münster on the other hand does not provide information on the author's position.

One of my publications is in CRIS but neither can I see it nor work on it. What do I have to do?

When using the [global search](#) and finding one of your publications is already in CRIS but you are not related as an author, you can claim the relation to this publication. For further details, see [Side note: Claiming to be an author](#)

My publication is not visible on my institute's profile page. What do I have to do?

Please check first if your publication is set to "publicly visible". Only data set to "publicly visible" is delivered to [the research portal](#) and CMS tool like [Imperia](#). Please note that it will take several hours until publicly visible content is available to the internet.

Next, please check how e.g. Imperia gathers your data for your website. In CRIS, publications, projects, awards, doctorates and habilitations are not directly linked to you as a person, but to your [card](#), i.e. a person's affiliation with an institution of the University. [Imperia](#) offers different ways to gather information connected to cards. Depending on the definitions for your Imperia page, a publication may be displayed or not. Therefore please check in Imperia the option "The information relates to". Here you can specify whether

- only the content associated with the card selected in Imperia is to be included
- all content of all cards of the person are to be displayed. If you select this option ("the person in general = all cards"), all content will be collected and appear in the profile of a person. We recommend this option

Why is it not possible to import all my publication data from e.g. Web of Science (WoS)?

Due to legal licensing reasons, the University Münster has only limited access to WoS data so that CRIS can only import journal articles with their basic information. The University Münster and the ULB are looking for solutions, but this will take time.

Why can't I use my ORCID iD to search for my publication in e.g. Scopus?

Searching via an ORCID iD is not yet possible for all online sources used by CRIS. Please search for your name when [importing](#) via PubMed or Scopus.

You can nevertheless use your ORCID profile for importing the publication you listed in ORCID yourself. Please keep in mind that the ORCID's interface is faulty so that the imported publication entries might require more revision than those imported from e.g. Scopus. A deeper integration of ORCID is also planned for the medium-term future.

Side note: Claiming to be an author

When using the [global search](#) and finding one of your publications is already in CRIS but you are not related as an author, you can claim the relation to this publication.

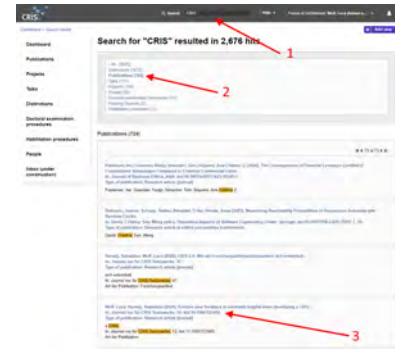
Finding a publication not related to you

Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries which are already related to you (or to your organisation if you are in a coordinating role) - e.g. all publications connected to you via your [cards](#).

But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title.

Click on the magnifying glass to open a text field. Here you enter the term you want to search for. Press "Enter". The Search will collect data from e.g. publication titles, project titles, names of persons or organisations. All hits are presented in a browsable list. You can also narrow down the hits using the displayed categories.

If there is an entry you contributed to, please ask for being related to this entry instead of adding a duplicate entry - either by using the claiming function for publications or simply asking your colleagues.



Claiming a relation

After identifying a publication that is not related to you as its author, you can click on the hit presented to you in the result list of the global search. Now you will see a summary of the publication's details. Now you want someone to add your [card](#) to this publication:

1. Personal contact

On the bottom of the publication's summary page you see which persons affiliated to the University of Münster are already connected to this publication as author or editor. You can also see their organisation at the University of Münster. You can now contact this person or someone from their organisation (with a [coordinating role](#)) asking for relating [your card](#) to the publication entry.

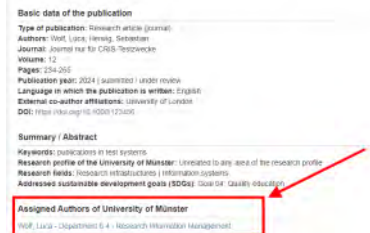
If the person already left the University of Münster, please contact cris@uni-muenster.de.

As soon as you are related to this existing entry, you can find it in your list views and manage its information,

2. Claiming a relation in the system

In the upper right corner of the publication's summary page you can find the claiming option next to an exclamation mark. Click on this and CRIS will generate a claiming request. Click on "Save" to send this request.

Positive user feedback is extremely helpful when developing a CRIS



This claiming message will be sent to e.g. the CRIS team and others with the system rights to add you as an author or editor. It may take some time until they could take care of your request - thus the personal contact may be faster.

As soon as you are related to this existing entry, you can find it in your list views and manage its information,



Side note: Publication cloning

When you want to enter a publication that is similar to a already existing one - e.g. your book is published in a new edition or a journal article is re-published with new data - you can "clone" the exiting entry. This way you can keep the key details of the entry and just add new information.

⚠ The existing publication entry has to be at least in the [status](#) "Input finished - Publication is published"

If it is possible to clone a publication you will find the "Clone" option in the [list view](#) for this entry - next to "Edit" and "Delete".



Click on "Clone" and the system will generate a new entry on status "Input is ongoing - Record is incomplete.. You will be directly forwarded to the editing mask of this new entry.

The clone has the key information from the original publication entry. You can now add new information:

- The title has the prefix "COPY OF:" (this prevents the system from assuming this may be a [duplicate](#)). You can delete this prefix and change the title of the clone if necessary
- Details like publication year, edition, volume, pages or ISBN are empty and need new information for the new publication

You can now work on the clone entry just like you would on every other entry you e.g. [added manually](#). Please remember to change the status and visibility of the new entry.

Projects

Projects are activities related to a specific topic and carried out in a limited time frame. Projects managed in CRIS differ in how they are funded - internally or externally - and if the main management activity is done at the University of Münster or outside. Externally funded projects are usually prepared by the CRIS team, so that you only manage content details and team members. Projects funded by own resources or project carried at other research institutions are managed by the researchers, who are affiliated to the University of Münster.

The following chapters will explain the differences between project types and how to manage project data in CRIS.

Content

- [Project basics](#)
- [FAQ for managing projects](#)
- [Manage Own resources project](#)
- [Manage projects carried out outside Uni Muenster](#)
- [Manage Externally funded projects](#)

By the way: Research focuses of persons are not managed as project data, but added to a [person's CV](#).

Project basics

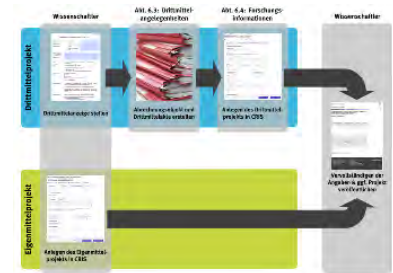
Projects are **scientific activities related to a specific topic** and carried out in a **limited time frame**. Also scientific events or visiting professorships are regarded as projects. Projects collected in CRIS differ in how they are funded - internally or externally - and if the main management activity is done at the University of Münster or outside. Externally funded projects are usually prepared by the CRIS team, so that you only manage details of the content. Projects funded by own resources are managed by the researchers involved.

The following chapters will explain the differences between project types and how to manage project data in CRIS.

Projects differ mainly based on their funding:

- **Own resources projects:** Projects carried out at the University of Münster and financed from the organisational unit's own budget - e.g. when you do not have to involve the department for external funds accounting. It is the only project type carried out at the University of Münster that you / [someone](#) [coordination](#) [organisational data](#) can actively add in CRIS
- **Externally funded projects:** These projects are prepared by the CRIS team based on data from the department for external funds accounting / "Drittmittelstelle" (normally information from the funding's notification). All other information e.g. related to the project's topic or involved persons can be managed by the project leader / team

Further details can be found below:



Projects the University of Münster and how they are organised in CRIS

Content

- [Different types of project in CRIS](#)
 - [Project carried out at University of Münster](#)
 - [Own resources project](#)
 - [Internally at the University of Münster funded projects](#)
 - [Externally funded project](#)
 - [Project carried out outside the University of Münster](#)

Different types of project in CRIS

Project types in CRIS are organised in different subcategories - for externally funded projects for example by funder or coordinating organisation. Please find the details below:

Project carried out at University of Münster

If a project is carried out at the University of Münster, it belongs to one of the following subcategories, depending on the funding. This includes:

Own resources project

[Own resources projects](#) are financed from the own budget of an organisational unit of the University of Münster. You can add and manage own resources projects on your own in CRIS.

Internally at the University of Münster funded projects

This is a special type for projects that are as well carried out at the University of Münster as funded by internal University of Münster funds - but these funds have to be won in competitive procedures. Examples are Topical Programs offered by the Rectorate.

Similar to externally funded projects, these entries are prepared by the CRIS team. Thus, if you are leading such a project, please send the corresponding funding notification and PSP element to cris@uni-muenster.de and we will prepare the data entry for you. Descriptions, keywords, involved persons (affiliated to the University of Münster) etc. can be edited by you.

Externally funded project

[Externally funded projects](#) are e.g. financed by thirdparty or state funds or contract research. They are subcategorised by project organisation and type of funding.

These projects are prepared by the CRIS team based on data from the department for external funds accounting / "Drittmittelstelle" (normally information from the funding's notification). Unfortunately we currently do not receive information on externally funded UKM projects. If you are missing your externally funded project, please send the corresponding funding notification and funds number to cris@uni-muenster.de and we will prepare the data entry for you.

All information e.g. related to the project's topic can be managed by the project leader / team. Thus descriptions, keywords, involved persons (affiliated to the University of Münster), visibility etc. can be edited by you.

Subcategories are:

- Individual project
- Scientific Event

- Subproject in DFG-joint project hosted at University of Münster
- Subproject in DFG-joint project hosted outside University of Münster
- Main DFG-project hosted at University of Münster
 - *Entries für "Main DFG-projects hosted outside University of Münster" are managed by the CRIS team as some kind of "master project" your sub-projects are organised in. If you miss something, please contact us at cris@uni-muenster.de*
- EU-project hosted at University of Münster
- EU-project hosted outside University of Münster
- Main BMBF-joint project
- Participation in BMBF-joint project
- Participation in other joint projects

Project carried out outside the University of Münster

If a project is / was [not carried out at the University of Münster](#) but has researchers affiliated to the University of Münster involved, it belongs to this category. This also includes projects a person carried out at another research institution prior to their time at University of Münster. For example:

- You led this project while working at another university. Of course you want to present your work after changing to University of Münster - so you can add your former project contributions here
- You as a University of Münster member contribute to an external project, that is completely hosted at another research institution. Your contribution is not managed by the external funds accounting

Similar to own resources projects, you can add and manage these projects on your own in CRIS.

FAQ for managing projects

Content

- [I am part of a project team and would like to change something in the project's entry. But I do not see the project in CRIS](#)
- [I am part of a project team and should add colleagues to the project entry. But I am not allowed to](#)
- [My externally funded project is missing in CRIS](#)
- [My externally funded project is in CRIS, but information and team members are missing](#)
- [My project is not on my institute's website](#)

I am part of a project team and would like to change something in the project's entry. But I do not see the project in CRIS

If you are logged in to CRIS as a scientist, you can only see and edit projects to which you are assigned at least as a project member (see the section "Project participants at University of Münster" in this [project chapter](#)) or which you have created yourself, i.e. your own resources projects. If in doubt, please search for the project using the [global search](#) to check whether the project is already listed in CRIS.

To be assigned to a project, you can either ask colleagues from the project team or someone with a [coordination role](#) to add you to the project.

Or you can contact the CRIS team at cris@uni-muenster.de. In addition to the name of the project, we will also need the project website or something else that identifies you as a team member (or at least the project leader in cc to your email). When adding externally funded projects, the CRIS team normally only receives the names of the applying or leading persons. Therefore we need to check the position of persons who ask to be added to the project team as being connected to the project entry will allow you to make changes.

I am part of a project team and should add colleagues to the project entry. But I am not allowed to

Different roles in a project come with different editing rights for the project entry. Thus, depending on your position in the team, you may not add colleagues in "higher" project roles. If the project leader asks you to manage all team members in CRIS, please ask the project leader for an [user delegation](#). When you switch now into the project leader's role, you can add other team member, based on the leader's rights.

For technical reasons, please assign each person to only one project role. Best choose the "highest" position as this will include all editing rights of the other roles. Please note, that based on your own project role, you may not be able to edit or see all data.

My externally funded project is missing in CRIS

Please check if the project is already in CRIS, but you can not see it in your projects as you are not related to the project (see above). Please search for the project using the [global search](#) to check whether the project is already listed in CRIS.

If the externally funded project is missing in CRIS:

- For University of Münster projects, the project entries are prepared by the CRIS team based on data from the department for external funds accounting / "Drittmittelstelle". This may take some time, as the information travel through different departments. If you need an entry as fast as possible (e.g. for your website) or if an older project is missing, please send the funding notification and PSP number to cris@uni-muenster.de
- Unfortunately we currently do not receive information on externally funded UKM projects. If you are missing your externally funded project, please send the corresponding funding notification and funds number to cris@uni-muenster.de and we will prepare this data entry for you
- In some cases, subprojects or new funding phases can only be entered after information on the main project are added in CRIS - for example University of Münster hosted joint projects, Collaborative Research Centres, Collaborative Research Centers or (Clinical) Research Units. Just contact us at cris@uni-muenster.de and we will check the individual case

My externally funded project is in CRIS, but information and team members are missing

The CRIS team receives only basic information on externally funded projects - normally only the information available in the funding notification. All further information like descriptions, keywords, involved persons (who are affiliated to the University of Münster), visibility etc. need to be managed by the project leader / team. Please see [Manage Externally funded projects](#) for further details.

My project is not on my institute's website

Please check first if the project entry has "Visibility to public = visible". Only content with this setting will be displayed on your website.

Next, please make sure that the project is not on a status that set this subject to confidentiality (which would prevent the project entry from being publicly visible).

Manage Own resources project

Project types, which you can add and manage on your own in CRIS, are either own resources projects or [carried out outside the University of Münster](#). Own resources projects are financed from the own budget of an organisational unit of the University of Münster.

Content

- [Manage Own resources project](#)
 - [Add a new own resources project](#)
 - [Editing an existing own resource project](#)
- [Edit the details of a project](#)
 - [Key information](#)
 - [Thematic classification](#)
 - [Project participants at University of Münster](#)
 - [Project results](#)
 - [Research infrastructure](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of own resource projects](#)
 - [Visibility of your project](#)

Manage Own resources project

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Projects" (see Image 1a).

⚠ There is another type of projects at the University of Münster (Internally at the University of Münster funded projects). These projects are as well carried out at the University of Münster as funded by internal University of Münster funds - but these funds have to be won in competitive procedures. Examples are Topical Programs offered by the Rectorate. Similar to externally funded projects, these entries are prepared by the CRIS team. Thus, if you are leading such a project, please send the corresponding funding notification and PSP element to cris@uni-muenster.de and we will prepare everything for you. Descriptions, keywords, involved persons (affiliated to the University of Münster) etc. can be edited by you.

Add a new own resources project

A new own resources project can be added by clicking "Add new" in die upper right corner when you are on a list view page. Just click in die plus icon and choose "Projects".

A new mask will open (see Image 1b). Here you select the [type of project](#) you want to add. The selected type will control the following editing mask and show necessary information. You see a short description of each project type next to the option. After selecting a type you are directed to the editing mask.



Image 1a: Project rubric and adding a new entry

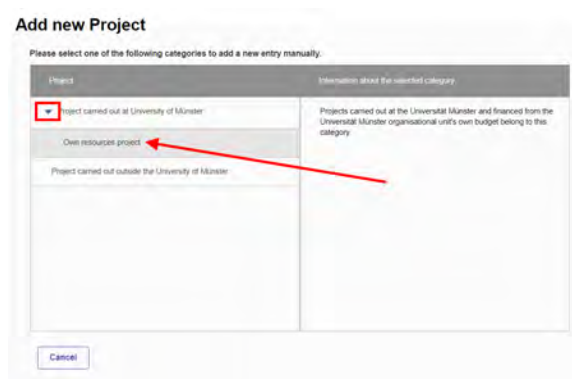


Image 1b: Select the type of project

Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing own resource project

A project already existing in CRIS can be accessed:

- by clicking "Edit" at a project entry in the list view (Image 2a)
- or by clicking the project's title in the list and then choosing "Edit" in the upper right corner of the following distinction summary (Image 2b)

In the editing mask you can now edit the content of the project (for details see below).

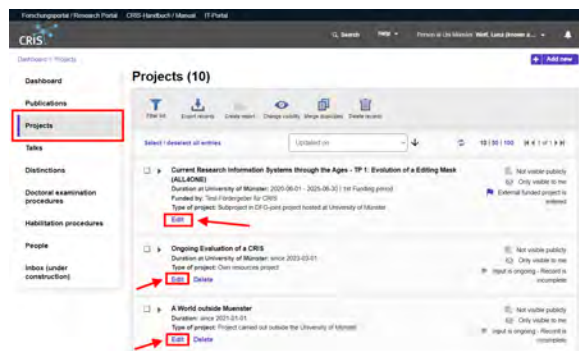


Image 2a: Edit via list view

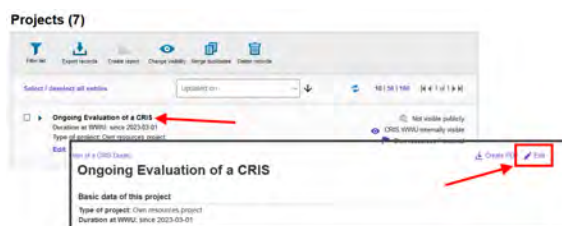


Image 2b: Edit via summary

Edit the details of a project

The editing mask for own resource projects has up to five sections / tabs (some hidden under "More" on the right tab). These information have to be edited for each own resource project. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics:

- **Type of project:** Please check if the selected type is correct
- **Project title:** If possible, note both the German and the English project title
 - When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that it may be a duplicate. For further information, see [Side note: Managing duplicates](#). **⚠ Please note:** For bilingual input fields like this one, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates
- **Acronym:** Official short description or acronym of the project (e.g., "PICTURE" or "SFB 656 MoBil"). A project does not need to have an acronym, the field may be empty
- **Start and End date at University of Münster:** The start date is mandatory. The end date is not mandatory until the project is finished, but you need to remember to enter this end date latest when the project is finished
- **Status of project:** The project status is used by e.g. [Imperia](#) for managing project lists on your website. Based on start and end date, the project status will be calculated each time you save the project entry
- **Website of the project:** If possible, enter the project's official URL here. This URL is published e.g. in the [research portal](#) and will allow interested people to find more information on your work
- **Abstract / Teaser:** Add a short description (max. 2048 characters)
- **Project description:** Describe your work best both in German and English. Please do not use html, markup, LaTeX, ... tags
- **Keywords :** Describe the topic of your project with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

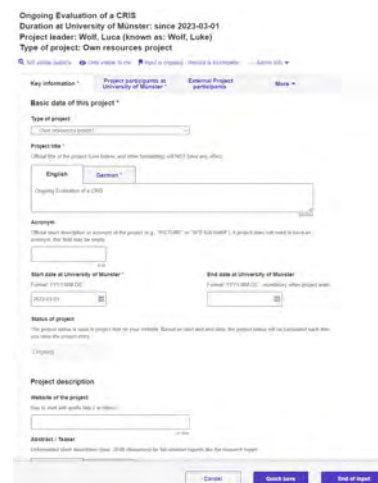


Image 3a: Key information



Thematic classification

From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):




- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

Image 3b: Thematic classification

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications for a project on the bottom of the tab "Key information".

For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter projects ending before 2024, you can also (additionally) relate the old core profile areas. For projects ending 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Project participants at University of Münster

Project participants affiliated to the University of Münster are connected to a project based on their role within a project. Possible project roles for own resource projects are:

- Project leader (at least 1 person has to be related as project leader)
- Research project staff
- Technical project staff
- Supporting project staff

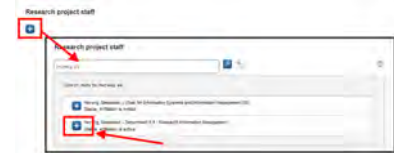



Image 4: Project participants at University of Münster

When assigning University of Münster participants (e.g. your colleague) to their project role, please remember to relate all involved persons, who are affiliated to the University of Münster, by their correct [card](#):

- Click on the white-plus-on-blue icon
- Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
- If a person has multiple [cards](#), please make sure to choose the correct one
- If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

After adding persons, you can remove a person's connection using the dustbin icon next to the entry.

Persons may have different roles in a project -  BUT: For technical reasons, please assign each person to only one role. Best choose the "highest" position as this will include all editing rights of the other roles. Please note, that based on your own project role, you may not be able to edit or see all data.

External Project participants

Project participants from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university).

You can relate the organisations of external project participants:

- To create this link, click on the white-plus-on-blue icon
- Look for the name of the external organisation (if you wait a moment, the system will make suggestions)
- If you found the correct organisation, click on the plus icon in front of the organisation. This creates the relation between project and organisation
- If you couldn't find the organisation, check again the by browsing the alphabetically ordered list (e.g. check F for Friedrich-Alexander-Universität Erlangen-Nürnberg (FAU))
- If you want to change / correct a relation, just click on the dustbin icon next to the entry and choose the correct entry instead
- If you couldn't find the organisation by searching nor by checking the list, you can create a new organisational entry by clicking the blue-plus-on-white icon:

- You see a new mask with two tabs:
 - "Key information" asks for basic data of the organisation like exact name, acronym, contact details or country
 - "Identifier" asks for additional identifiers
- Best work your way from the top of the "Key information" tab to its bottom
- After you entered all information for this new entry, click on "Done" in the lower right corner and you will return to the editing mask for the project

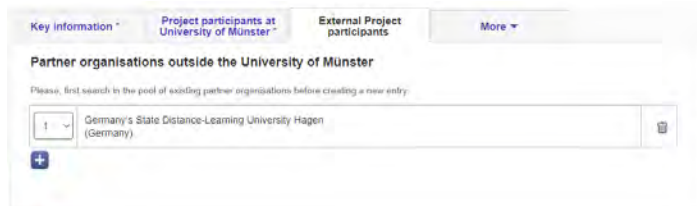


Image 5: Choose or add partner organisations outside the University of Münster

Project results

You find "Project results" by clicking on the last tab "More" and then select the respective option.

Projects are often connected to a lot of other objects. For example, did you talk about your project on a conference? Or did you receive a distinction for our work? Please use the plus icon to search for and related this content:

- **Publications resulting from this project:** Please relate here those publications that have been published as a result of this project
- **Talk about project activities & results:** Please relate here those talks that were given on results of this project
- **Distinctions resulting from project activities & results:** Please specify those distinctions that have been received for activities or results of this project
- **Doctoral examination procedures resulting from the project:** Please provide here those doctoral examination procedures that have arisen in conjunction with this project
- **Habilitation procedures resulting from the project:** Please provide here those habilitation procedures that have arisen in conjunction with this project

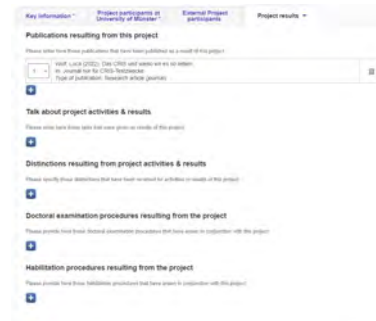


Image 6: Project results

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.



Note: Relations work both ways

If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

⚠ Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

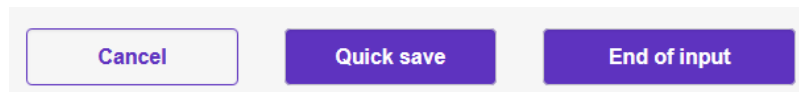
Research infrastructure

Please relate the research infrastructure (e.g. laboratory equipment, high performance computer) of the University of Münster, which is used to obtain the project's research results. Currently, only the HPC cluster "PALMA" can be chosen.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of own resource projects

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If it the status is successfully set, you will return to the list view of the rubric.

The [status](#) of your own resources projects or projects carried out outside the University of Münster pass through three status steps:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Own resources / external project is entered:** After gathering all necessary information and wanting to make the project visible (within CRIS and / or to the public) you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Project is finished:** When / after the project is finished, you have to change the status to the final step. In this "finished" status editing your project is no longer possible (but the CRIS team may edit the entry on your behalf). You can not change the status back to the step before. In our [research portal](#) or on your institute's website the project is flagged as "finished"

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the GERMAN project title is missing for the status "Input finished - Own resources / external project is entered":

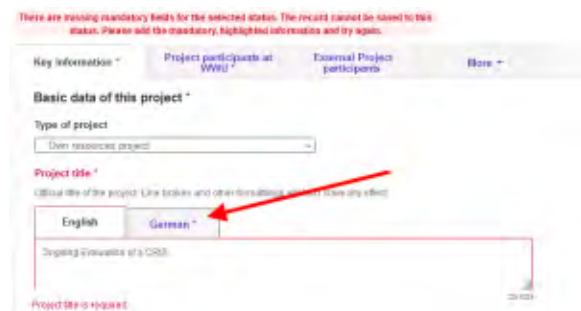


Image 8: Missing mandatory information

Visibility of your project

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly

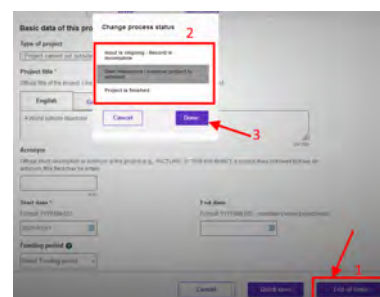


Image 7: Manage status of an entry

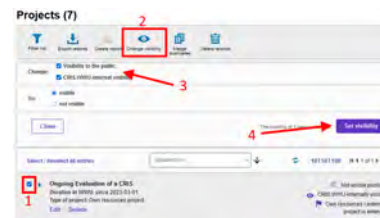


Image 9: Manage visibility of an entry

visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

i After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Manage projects carried out outside Uni Muenster

Project types, which you can add and manage on your own in CRIS, are either [own resources projects](#) or carried out outside the University of Münster.

If a project is / was [not carried out at the University of Münster](#) but has researchers involved, who are affiliated to the University of Münster, it belongs to this category. This also includes projects a University of Münster person carried out at another research institution prior to their time at University of Münster. For example:

- You led this project while working at another university. Of course you want to present your work after changing to University of Münster - so you can add your former project contributions here
- You as a University of Münster member contribute to an external project, that is completely hosted at another research institution. Your contribution is not managed by the external funds accounting

Similar to own resources projects, you can add and manage these projects on your own in CRIS.

Content

- [Manage projects carried out outside University of Münster](#)
 - [Add a new project carried out outside University of Münster](#)
 - [Editing an existing project carried out outside University of Münster](#)
- [Edit the details of a project](#)
 - [Key information](#)
 - [Thematic classification](#)
 - [Project participants at University of Münster](#)
 - [External Project participants](#)
 - [Funding information](#)
 - [Project results](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of projects carried out outside University of Münster](#)
 - [Visibility of your project](#)

Manage projects carried out outside University of Münster

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Projects" (see Image 1a).

Add a new project carried out outside University of Münster

A project carried out outside University of Münster can be added by clicking "Add new" in die upper right corner when you are on a list view page. Just click in die plus icon and choose "Projects".

A new mask will open (see Image 1b). Here you select the [type of project](#) you want to add. The selected type will control the following editing mask and show necessary information. You see a short description of each project type next to the option. After selecting a type you are directed to the editing mask.

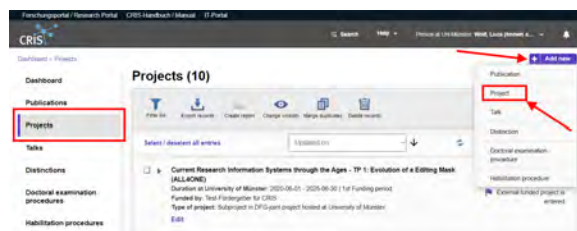


Image 1a: Project rubric and adding a new entry

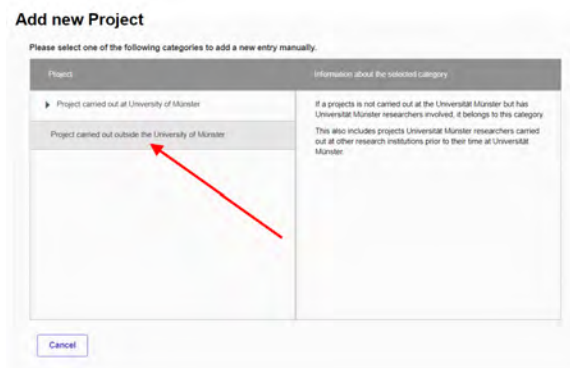


Image 1b: Select the type of project



Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing project carried out outside University of Münster

A project already existing in CRIS can be accessed:

- by clicking "Edit" at a project entry in the list view (Image 2a)
- or by clicking the project's title in the list and then choosing "Edit" in the upper right corner of the following distinction summary (Image 2b)

In the editing mask you can now edit the content of the project (for details see below).

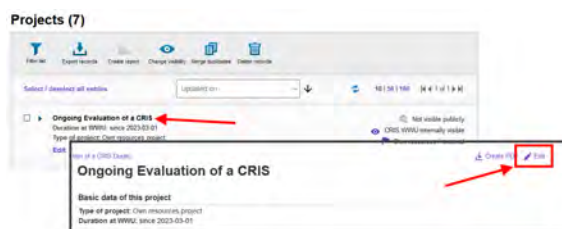
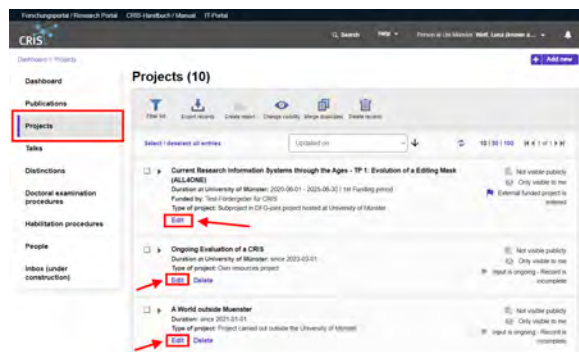


Image 2b: Edit via summary

Image 2a: Edit via list view

Edit the details of a project

The editing mask for projects carried out outside University of Münster has up to five sections / tabs (some hidden under "More" on the right tab). These information have to be edited for each project carried out outside University of Münster. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics:

- **Type of project:** Please check if the selected type is correct
- **Project title:** If possible, note both the German and the English project title
 - When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that it may be a duplicate. For further information, see [Side note: Managing duplicates](#). **⚠ Please note:** For bilingual input fields like this one, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates
- **Acronym:** Official short description or acronym of the project (e.g., "PICTURE" or "SFB 656 MoBil"). A project does not need to have an acronym, the field may be empty
- **Start and End date:** The start date is mandatory. The end date is not mandatory until the project is finished, but you need to remember to enter this end date latest when the project is finished
- **Funding period:** If a project has different funding periods, each period is represented by a separate project



Image 3a: Key information

- **Status of project:** The project status is used by e.g. [Imperia](#) for managing project lists on your website. Based on start and end date, the project status will be calculated each time you save the project entry
- **Website of the project:** If possible, enter the project's official URL here. This URL is published e.g. in the [research portal](#) and will allow interested people to find more information on your work
- **Abstract / Teaser:** Add a short description (max. 2048 characters)
- **Project description:** Describe your work best both in German and English. Please do not use html, markup, LaTeX, ... tags
- **Keywords :** Describe the topic of your project with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

Thematic classification




From spring 2024 on, CRIS will have [new systems for the thematic classification of research activities](#):

- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications for a project on the bottom of the tab "Key information".

For example, to select at least one field of research, proceed as follows:

- Click on the white plus on blue background 
- You can display the field of research, either alphabetically  or hierarchically  (here you can expand the areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the field of research, you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the field of research, apply, please select the category "Other research field"
- You can use the dustbin symbol to the right of the entry to remove this field and link another one to your entry

This logic is the same for the UN Sustainable Development Goals.

Project participants at University of Münster


Project participants affiliated to the University of Münster are connected to a project based on their role within a project. Possible project roles for external projects are:

- Project leader (at least 1 person has to be related as project leader)
- Applicants / Principal Investigators
- Co-Applicants / Co-Investigators
- Research project staff
- Technical project staff
- Supporting project staff

When assigning University of Münster participants (e.g. your colleague) to their project role, please remember to relate all involved persons, who are affiliated to the University of Münster, by their correct [card](#):

- Click on the white-plus-on-blue icon
- Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
- If a person has multiple [cards](#), please make sure to choose the correct one
- If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

After adding persons, you can remove a person's connection using the dustbin icon next to the entry.

Persons may have different roles in a project -  BUT: For technical reasons, please assign each person to only one role. Best choose the "highest" position as this will include all editing rights of the other roles. Please note, that based on your own project role, you may not be able to edit or see all data.

External Project participants

Project participants from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university).

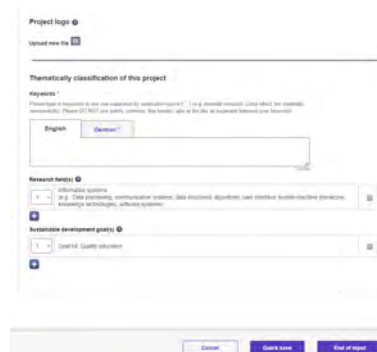


Image 3b: Thematic classification

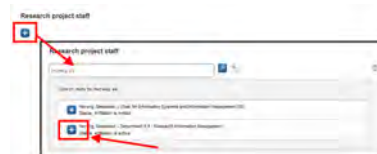


Image 4: Project participants at University of Münster

For projects not carried out at the University of Münster, you have to relate the external organisation in charge of this project - e.g. your former university or the institute hosting the project you contribute to.

In addition you can relate other organisations, who also contribute to this project, as partner organisations.

You can relate external organisations:

- To create this link, click on the white-plus-on-blue icon
- Look for the name of the external organisation (if you wait a moment, the system will make suggestions)
- If you found the correct organisation, click on the plus icon in front of the organisation. This creates the relation between project and organisation
- If you couldn't find the organisation, check again the by browsing the alphabetically ordered list (e.g. check F for Friedrich-Alexander-Universität Erlangen-Nürnberg (FAU))
- If you want to change / correct a relation, just click on the dustbin icon next to the entry and choose the correct entry instead
- If you couldn't find the organisation by searching nor by checking the list, you can create a new organisational entry by clicking the blue-plus-on-white icon:
 - You see a new mask with two tabs:
 - "Key information" asks for basic data of the organisation like exact name, acronym, contact details or country
 - "Identifier" asks for additional identifiers
 - Best work your way from the top of the "Key information" tab to its bottom
 - After you entered all information for this new entry, click on "Done" in the lower right corner and you will return to the editing mask for the project

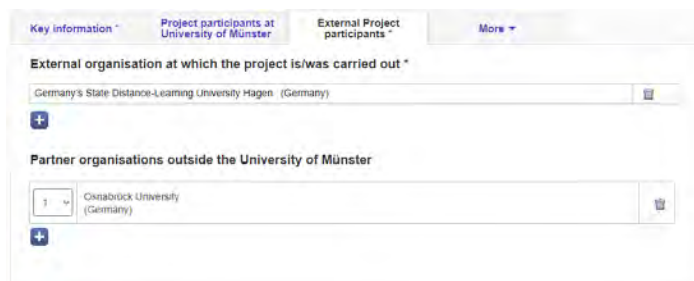


Image 5: Choose or add partner organisations outside the University of Münster

Funding information

You find "Funding information" by clicking on the last tab "More" and then select the respective option. If necessary, you can add here further details like:

- Funder / funding scheme (assigned by using the plus icon)
- Funding identifier
- Financial information

Funding information are only visible within CRIS and used for e.g. statistics.

Project results

You find "Project results" by clicking on the last tab "More" and then select the respective option.

Projects are often connected to a lot of other objects. For example, did you talk about your project on a conference? Or did you receive a distinction for our work? Please use the plus icon to search for and related this content:

- **Publications resulting from this project:** Please relate here those publications that have been published as a result of this project
- **Talk about project activities & results:** Please relate here those talks that were given on results of this project
- **Distinctions resulting from project activities & results:** Please specify those distinctions that have been received for activities or results of this project
- **Doctoral examination procedures resulting from the project:** Please provide here those doctoral examination procedures that have arisen in conjunction with this project
- **Habilitation procedures resulting from the project:** Please provide here those habilitation procedures that have arisen in conjunction with this project

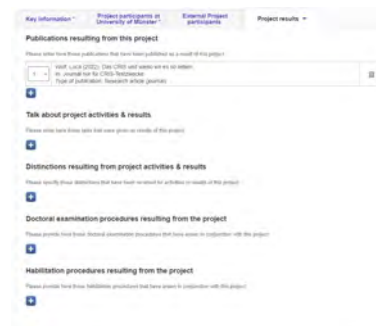


Image 6: Project results

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.



Note: Relations work both ways

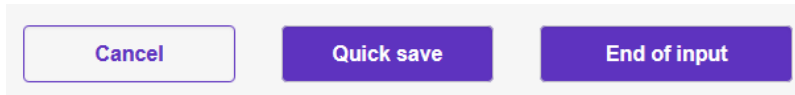
If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

⚠ Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information is missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of projects carried out outside University of Münster

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status is missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [status](#) of your own resources projects or projects carried out outside the University of Münster pass through three status steps:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Own resources / external project is entered:** After gathering all necessary information and wanting to make the project visible (within CRIS and / or to the public) you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit data in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Project is finished:** When / after the project is finished, you have to change the status to the final step. In this "finished" status editing your project is no longer possible (but the CRIS team may edit the entry on your behalf). You can not change the status back to the step before. In our [research portal](#) or on your institute's website the project is flagged as "finished"

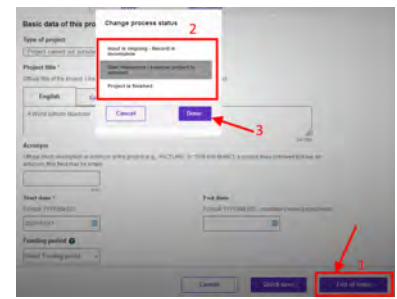


Image 7: Manage status of an entry

When saving into a new status, the system will check if all mandatory information for this specific status is / will be filled. If something is missing, this field will be marked in red. In the example the GERMAN project title is missing for the status "Input finished - Own resources / external project is entered":

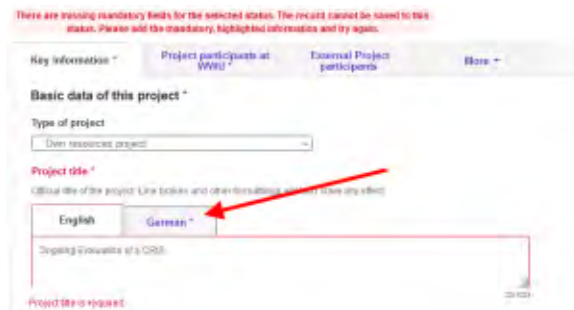


Image 8: Missing mandatory information

Visibility of your project

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the [data entry](#) for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

📌 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

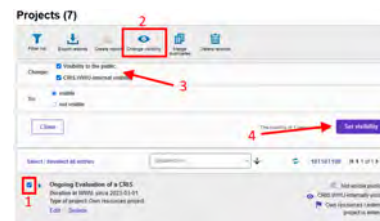


Image 9: Manage visibility of an entry

Manage Externally funded projects

Externally funded projects are e.g. financed by thirdparty or state funds or contract research. They are subcategorised by project organisation and type of funding.

These projects are prepared by the CRIS team based on data from the department for external funds accounting / "Drittmittelstelle" (normally information from the funding's notification). Unfortunately we currently do not receive information on externally funded UKM projects. If you are missing your externally funded project, please send the corresponding funding notification and funds number to cris@uni-muenster.de and we will prepare this data entry for you.

Subcategories are:

- Individual project
- Scientific Event
- Subproject in DFG-joint project hosted at University of Münster
- Subproject in DFG-joint project hosted outside University of Münster
- Main DFG-project hosted at University of Münster
 - *Entries für "Main DFG-projects hosted outside University of Münster" are managed by the CRIS team as some kind of "master project" your sub-projects are organised in. If you miss something, please contact us at cris@uni-muenster.de*
- EU-project hosted at University of Münster
- EU-project hosted outside University of Münster
- Main BMBF-joint project
- Participation in BMBF-joint project
- Participation in other joint projects

The CRIS team prepares new externally funded projects in a status that is only visible within CRIS to you and other University of Münster project participants. All other information e.g. related to the project's topic can be managed by the project leader / team. Thus descriptions, keywords, involved persons (affiliated to the University of Münster), visibility etc. can be edited by you.

⚠ Internally at the University of Münster funded projects: This is a special type of projects which is as well carried out at the University of Münster as funded by internal University of Münster funds - but these funds have to be won in competitive procedures. Examples are Topical Programs offered by the Rectorate. Similar to externally funded projects, these entries are prepared by the CRIS team. Thus, if you are leading such a project, please send the corresponding funding notification and PSP element to cris@uni-muenster.de and we will prepare everything for you. Descriptions, keywords, involved persons (affiliated to the University of Münster) etc. can be edited by you.

Content

- [Manage Externally funded projects](#)
 - [Editing an externally funded projects](#)
- [Edit the details of a project](#)
 - [Key information](#)
 - [Thematic classification](#)
 - [Project participants at University of Münster](#)
 - [External Project participants](#)
 - [Funding information](#)
 - [Project structure](#)
 - [Project results](#)
 - [Research infrastructure](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of externally funded projects](#)
 - [Visibility of your project](#)

Manage Externally funded projects

Please log in to CRIS. On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric "Projects".

Editing an externally funded projects

A project already existing in CRIS can be accessed:

- by clicking "Edit" at a project entry in the list view (Image 1a)
- or by clicking the project's title in the list and then choosing "Edit" in the upper right corner of the following distinction summary (Image 1b)

In the editing mask you can now edit the content of the project (for details see below).

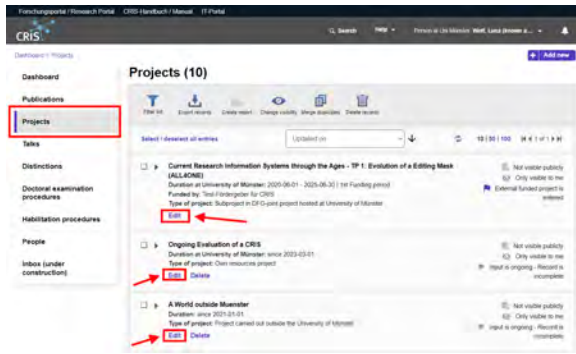


Image 1a: Edit via list view

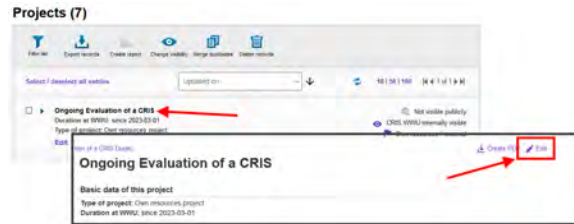


Image 1b: Edit via summary

Edit the details of a project

The editing mask for externally funded projects has up to seven sections / tabs (some hidden under "More" on the right tab). Depending on your own project role, you may not be able to edit or see all data. Information have to be edited for each externally funded projects , but most mandatory details were already prepared by the CRIS team. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *.

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. Depending on your own project role, you may not be able to edit or see all data. Information are structured based on topics:

- **Type of project:** Please check if the selected type is correct. Information is managed by the CRIS team, so if in doubt please write to cris@uni-muenster.de
- **Project title:** Please check if everything is correct, best check both the German and the English project title. Information is managed by the CRIS team, so if in doubt please write to cris@uni-muenster.de
- **Acronym:** Official short description or acronym of the project (e.g., "PICTURE" or "SFB 656 MoBil"). A project does not need to have an acronym, the field may be empty
- **Start and End date at University of Münster:** The CRIS team will enter start and end date based on the information from the funding notification. If there are official changes like a prolongation, please inform the CRIS team, forwarding official notifications on this to cris@uni-muenster.de. They will change the end date both in the key information and funding details
- **Funding period:** If a project has different funding periods, each period is represented by a separate project. Information is managed by the CRIS team, so if in doubt please write to cris@uni-muenster.de
- **Status of project:** The project status is used by e.g. **Imperia** for managing project lists on your website. Based on start and end date, the project status will be calculated each time you save the project entry
- **Website of the project:** If possible, enter the project's official URL here. This URL is published e.g. in the [research portal](#) and will allow interested people to find more information on your work
- **Abstract / Teaser:** Add a short description (max. 2048 characters)
- **Project description:** Describe your work best both in German and English. Please do not use html, markup, LaTeX, ... tags
- **Keywords :** Describe the topic of your project with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords



Image 2a: Key information

Thematic classification

From spring 2024 on, CRIS will have **three systems for the thematic classification of research activities**:

- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications for a project on the bottom of the tab "Key information".

For example, to select at least one area from the research profile, proceed as follows:

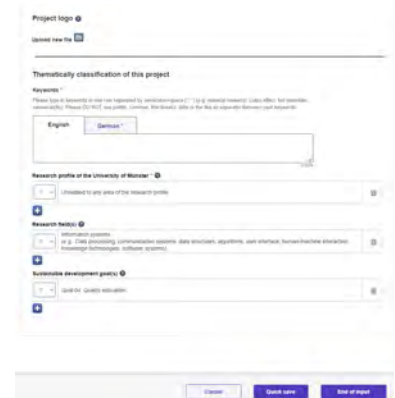





Image 2b: Thematic classification

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter projects ending before 2024, you can also (additionally) relate the old core profile areas. For projects ending 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Project participants at University of Münster

Project participants affiliated to the University of Münster are connected to a project based on their role within a project. When setting up a externally funded project's entry, the CRIS will assign responsible persons based on information from the funding notification. In most cases, this will be project leader and applicant. They have to take care of adding all other project members.


Possible project roles for external funded projects are:

- Project leader (at least 1 person has to be related as project leader)
- Applicants / Principal Investigators (*depending in the project type*)
- Co-Applicants / Co-Investigators (*depending in the project type*)
- Speakers (*depending in the project type*)
- Administrative project managers (*depending in the project type*)
- Research project staff
- Technical project staff
- Supporting project staff

When assigning University of Münster participants (e.g. your colleague) to their project role, please remember to relate all involved persons, who are affiliated to the University of Münster, by their correct card:

- Click on the white-plus-on-blue icon
- Look for your colleague using the search field (if you wait a moment, the system will make suggestions) or the "A to Z" list
- If a person has multiple cards, please make sure to choose the correct one
- If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

After adding persons, you can remove a person's connection using the dustbin icon next to the entry.

Persons may have different roles in a project -  BUT: For technical reasons, please assign each person to only one role. Best choose the "highest" position as this will include all editing rights of the other roles. Please note, that based on your own project role, you may not be able to edit or see all data.

External Project participants

Project participants from outside the University of Münster are not related with a personal profile, but with their affiliated organisation. Only the main organisation is linked (e.g. the university), not a sub organisation (e.g. a department of the university).

For externally funded projects, such project partners may be (*depending on project type*);

- External host organisation by which the project is coordinated (*in most cases already managed by the CRIS team*)
- Partner organisations outside the University of Münster
- Former host organisation from which the project was transferred to the University of Münster (*in most cases already managed by the CRIS team*)

You can relate the organisations of external project participants:

- To create this link, click on the white-plus-on-blue icon
- Look for the name of the external organisation (if you wait a moment, the system will make suggestions)
- If you found the correct organisation, click on the plus icon in front of the organisation. This creates the relation between project and organisation

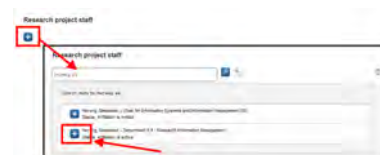


Image 3: Project participants at University of Münster



Image 4: Choose or add partner organisations outside the University of Münster

- If you couldn't find the organisation, check again the by browsing the alphabetically ordered list (e.g. check F for Friedrich-Alexander-Universität Erlangen-Nürnberg (FAU))
- If you want to change / correct a relation, just click on the dustbin icon next to the entry and choose the correct entry instead
- If you couldn't find the organisation by searching nor by checking the list, you can create a new organisational entry by clicking the blue-plus-on-white icon:
 - You see a new mask with two tabs:
 - "Key information" asks for basic data of the organisation like exact name, acronym, contact details or country
 - "Identifier" asks for additional identifiers
 - Best work your way from the top of the "Key information" tab to its bottom
 - After you entered all information for this new entry, click on "Done" in the lower right corner and you will return to the editing mask for the project

Funding information

You find "Funding information" by clicking on the last tab "More" and then select the respective option. If necessary, you can add here further details like:

- Funder / funding scheme (assigned by using the plus icon)
- Funding identifier
- Financial information
- Related financial project accounts like PSP-elements

Funding information are only visible within CRIS and used for e.g. statistics. Funding information are managed by the CRIS team based on funding's notification and information from external funds accounting.

Project structure

You find "Project structure" by clicking on the last tab "More" and then select the respective option.

Sub-projects are connected to their main project by the CRIS team when setting up the project's entry.

If a project has different funding periods, each period is represented by a separate project. Here the current period is related to the previous funding period's project (if available in CRIS).

Project results

You find "Project results" by clicking on the last tab "More" and then select the respective option.

Projects are often connected to a lot of other objects. For example, did you talk about your project on a conference? Or did you receive a distinction for our work? Please use the plus icon to search for and related this content:

- **Publications resulting from this project:** Please relate here those publications that have been published as a result of this project
- **Talk about project activities & results:** Please relate here those talks that were given on results of this project
- **Distinctions resulting from project activities & results:** Please specify those distinctions that have been received for activities or results of this project
- **Doctoral examination procedures resulting from the project:** Please provide here those doctoral examination procedures that have arisen in conjunction with this project
- **Habilitation procedures resulting from the project:** Please provide here those habilitation procedures that have arisen in conjunction with this project

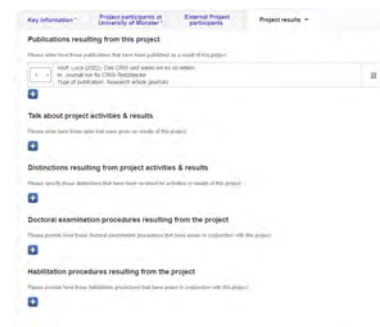


Image 5: Project results

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.



Note: Relations work both ways

If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

⚠ Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

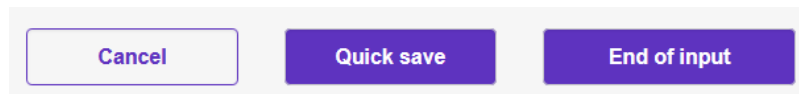
Research infrastructure

Please relate the research infrastructure (e.g. laboratory equipment, high performance computer) of the University of Münster, which is used to obtain the project's research results. Currently, only the HPC cluster "PALMA" can be chosen.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information is missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of externally funded projects

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [status](#) of your externally funded projects pass through three status steps:

- **Input is ongoing - Record is incomplete:** In most cases projects, which are funded by external parties, are prepared by the CRIS team based on the information they receive from the "Drittmittel-Abteilung". If possible they already answered all mandatory fields, so that your externally funded project awaits you on the second status step. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **External funded project is entered:** After the CRIS team prepared this project entry for you and moved it to this status, you can still work on the details and add information - e.g. project summary, keywords and relating University of Münster persons working in your project team. You can not change the status back to the step before. The visibility of the entry will be managed in a second process, explained later on this site
- **Project is finished:** When / after the project is finished, you have to change the status to the final step. In this "finished" status editing your project is no longer possible (but the CRIS team may edit the entry on your behalf). You can not change the status back to the step before. In our [research portal](#) or on your institute's website the project is flagged as "finished"

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. For externally funded projects most mandatory details were already prepared by the CRIS team

Visibility of your project

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change an entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"

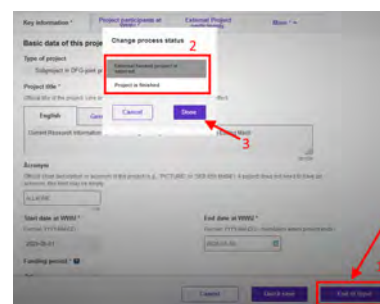


Image 6: Manage status of an entry

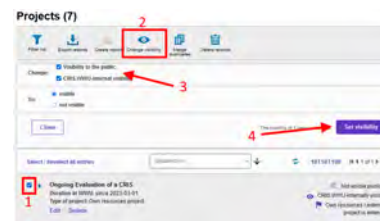



Image 7: Manage visibility of an entry

- "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Talks

Scientific and practice-oriented talks such as conference talks, speeches, keynotes or sermons are included in CRIS in the rubric "Talks". Teaching events and associated lectures are not managed in CRIS.

Content

- [Manage talks](#)
 - [Add a new talk](#)
 - [Editing an existing talk](#)
- [Edit the details of a talk](#)
 - [Key information](#)
 - [Event Information](#)
 - [Thematic classification](#)
 - [Abstract & slides](#)
 - [Related Contents](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of talks](#)
 - [Visibility of your talk](#)

Manage talks

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Talks".

Add a new talk

A new talk can be added by clicking "Add new" in the upper right corner when you are on a list view page. Just click in the plus icon and choose "Talk". The editing mask will open.

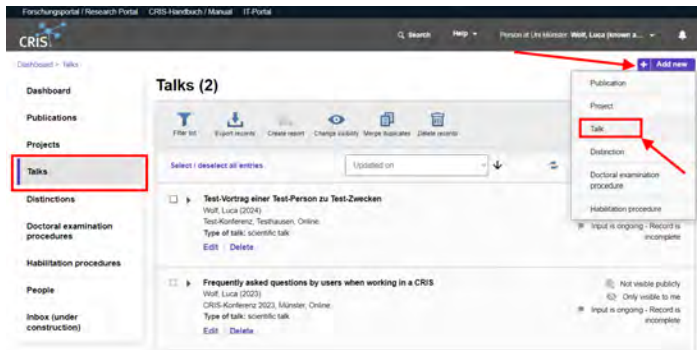


Image 1: Talk rubric and adding a new entry



Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing talk

A talk already existing in CRIS can be accessed:

- by clicking "Edit" at a talk entry in the list view (Image 2a)
- or by clicking the talk's title in the list and then choosing "Edit" in the upper right corner of the following talk summary (Image 2b)

In the editing mask you can now edit the content of the talk (for details see below).

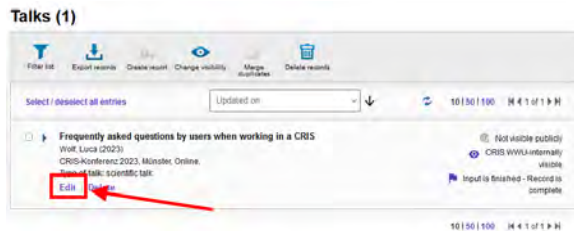


Image 2a: Edit via list view

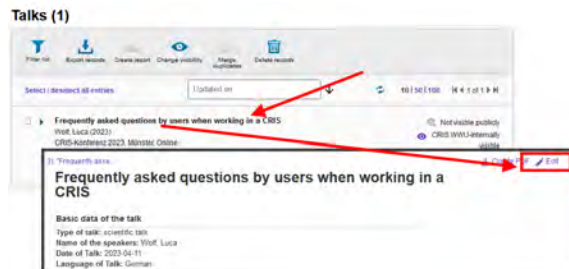


Image 2b: Edit via summary

Edit the details of a talk

The editing mask for talks has four sections / tabs. These information have to be edited for each talk. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

Your profile's details are organised in five different tabs. The first three tabs are always visible, while two are hidden under "More" on the right tab (see Image 3).

1. Key information: This tab contains basic information about the lecture
2. Event Information: On the second tab please enter mandatory information on the event where the talk was given
3. Thematic classification: Here you add areas of the university's research profile or KDSF research fields in which the entry fits thematically
4. Abstract & slides: On the fourth tab you can add further content information
5. Related Contents: On tab number 5 you can relate other CRIS content to your talk which is connected to this talk. Please use the plus icon to search for and relate this content



Image 3: Different tabs in the talk mask

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics:

- **Title or Topic of Talk:** Please note title or topic of the talk in at least German, best English and German
 - When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that it may be a duplicate. For further information, see [Side note: Managing duplicates](#). **⚠ Please note:** For bilingual input fields like this one, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates
- **Date of Talk:** When was this lecture given?
- **Name of the speakers:** In the text field all speakers have to be listed - no matter if they are affiliated to the University of Münster. Please enter the speakers' names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2".

- **Speakers of University of Münster:** Use the plus icon to add University of Münster affiliated speakers:
 - You are related by default when adding a new talk
 - The system will automatically relate your first [card](#). This should be your current position - please check your [personal profile](#) if this is correct
 - Of course you can also select an ended card if the talk was held during a former University of Münster position
 - If you want to relate another card than the one automatically related, just remove this one from the list and choose another one using the search function
 - ⚠ When you are working via [delegation](#) for another user, this person will be automatically connected to this entry. But if you are working in a [coordinating role for an organisation](#), no person will be connected! You have to manually add a person to this entry via the white-plus-on-blue-button (see below)
 - Other University of Münster speakers can also be found using the search function. Please relate all persons affiliated to the University of Münster involved (e.g. your colleague):
 - Click on the white-plus-on-blue icon
 - Look for your colleague using the search field or the "A to Z" list
 - If a person has multiple [cards](#), please make sure to choose the correct one
 - If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead
- **Type of talk:** Please select if this talk was scientific or practical such as conference talks, a sermon or another type of speech. *Teaching events and associated lectures are not included*
- **At time of the talk at least one speaker was a member of the University of Münster:** If this talk was given with at least one active University of Münster affiliation, please answer "yes". If this is e.g. a talk from before working at University of Münster and no other speaker affiliated to the University of Münster was involved, please answer "no"
- **Talk is invited:** Please check the box if you were invited to give a talk
- **Talk is a keynote:** Please check the box if the talk was a keynote lecture or the main talk on a conference
- **Language of Talk:** Select the language of the talk
- **Core profile area(s) & emerging field(s) of the University of Münster:** Core profile areas describe current research focuses of the University of Münster. Please assign at least one entry from the focus list by using the blue plus icon
- **Keywords:** Describe the topic of your talk with keywords someone would use when looking for information in this scientific field. Please enter keywords with semicolon+space as separator (keyword1; keyword2; ...). Please DO NOT use points, commas, line-breaks, tabs or the like as separator between your keywords

Image 4: Key information

Event Information

On the second tab please enter mandatory information on the event where the talk was given:

- **Name of Event:** Please enter the official name of e.g. the conference, if possible include the year of the event
- **Event venue / Country of the event:** In which city and in which country took the event place?
 - If you do not know the country, please choose "Nicht spezifiziert / Unspecified"
 - For online / virtual events, please choose "Online" as a country
- **Start and End date of the event**
- **Organiser of event:** Please note the persons, group or organisation responsible for this event
- **Website of the event:** If possible, add the URL where further information can be found, e.g. the official website from the organisers or the event

Image 5: Event information

Thematic classification

From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):




- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications of this talk on the 3rd tab "Thematic classification".

Image 6: Thematic classification

For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter talks held before 2024, you can also (additionally) relate the old core profile areas. For talks held 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Abstract & slides

On the fourth tab (hidden behind the title "More") you can add further content information:

- **Abstract:** Please enter the abstract or a short summary. Please do not use html, markup, LaTeX, ... tags
 - By the way: If this abstract was published e.g. in the conference proceedings, you can add the abstract also as a publication and link publication and talk
- **DOI of presentation documents:** If a DOI exists for your presentation documents, enter this DOI here
 - Please enter a valid DOI. A valid DOI starts with 10. - e.g. *10.1000/123456* or *10.1038/issn.1476-4687*. Do not enter additional information like *https://dx.doi.org/* or *DOI:*
- **Link to slides:** Here you can add the URL where your slides can be found / downloaded

Related Contents

On tab number 5 (hidden behind the title "More") you can relate other CRIS content to your talk which is connected to this talk. Please use the plus icon to search for and relate this content:


- **Publications referred to in the talk:** If you talked publicly about your findings e.g. on a conference, you can connect talk and publication. Also, if the accompanying paper of your talk is published, e.g. if it appeared in the respective conference proceedings issue
- **Projects the talk is about:** If your talk is about the results of a project, please assign this project here
- **Distinctions received for this talk:** Did you receive an award for your talk or your work connected to this talk? Please assign here all received distinctions / nomination or scholarships

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.



Note: Relations work both ways

If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

 Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:

Cancel

Quick save

End of input

- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry

- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of talks

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If it the status is successfully set, you will return to the list view of the rubric.

The [statuses](#) of talks are:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Input finished - Record is complete:** After gathering all necessary information and wanting to make the talk visible (within CRIS and / or to the public) you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After r revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the GERMAN title is missing for the status "*Input finished - Record is complete*":

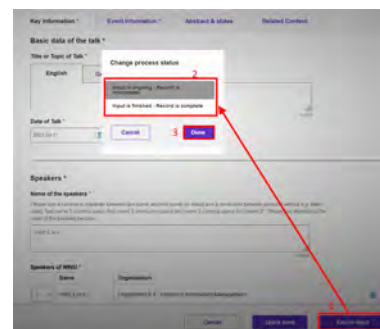


Image 7: Manage status of an entry



Image 8: Missing mandatory information

Visibility of your talk

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

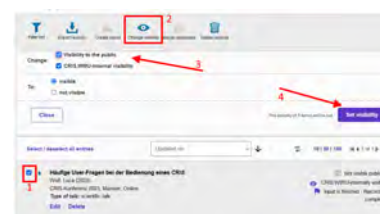


Image 9: Manage visibility of an entry

ⓘ After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Distinctions

Distinctions, honours or awards received by e.g. scientists of the University of Münster are collected in the rubric "Distinctions". This includes

- internal university prizes and awards such as research, teaching, dissertation and transfer awards
- as well as prizes and honours awarded by external bodies, such as the Gottfried Wilhelm Leibniz Prize, honorary doctorates, doctoral studentships, admission to Academy of Sciences and best paper awards.

Both individual and multiple awardees from the University of Münster can be connected with the honour they received.

Content

- [Basics of distinctions and prizes](#)
- [Managing distinctions](#)

Basics of distinctions and prizes

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Types of distinctions

You add and manage in CRIS distinctions you received or were nominated for - thus the specific honour for a specific topic / activity at a specific time. There are different types of distinctions in CRIS:

Types of distinctions	
Nomination for an award or distinction	Nominations for awards or distinctions which eventually you were not awarded are covered by this category.
Scholarship	All forms of scholarships (e.g. research scholarships, doctoral scholarship or travel scholarships) you were granted belong to this category.
Publication or conference prize - Best presentation award	Awards or distinctions you received for a specific publication or talk / presentation or a specific activity as a reviewer belong to one of the following subcategories: <ul style="list-style-type: none"> • Awards or distinctions awarded for a talk / presentation you gave e.g. during a scientific conference • Awards or distinctions you receive for a publication (e.g. book, journal article, conference paper or poster) • Awards or distinctions you receive for your activity as a reviewer at scientific conferences or for scientific journals
Publication or conference prize - Best publication award	
Publication or conference prize - Best reviewer award (conference or journal)	
Research award or other distinction	Any other award, distinction or honor for academic achievements, early-stage researchers or personal merits. This might be e.g. a research award, teaching award, dissertation award or honorary doctoral degree.

Type of awards

The prizes / awards you received (or were nominated for) is related to the distinction entry. This prize is "independent" from year or honoured person - like the nobel prize, which is "a thing on its own" and is connected to a person and a year by the distinction.

Awards are also categorised in different types. The following overview should help you to assess the received honour and correctly assign the award. A list of awards is already included in CRIS - in these cases you only need to link the distinction to the award (see details in [Managing distinctions](#)). If you have difficulties to categorise an award, please feel free to contact us.

Parent category	Type of award	Description	Examples
Prizes for academic achievements	Prize for excellent research	Prize for outstanding scientific achievements in a specific research field	Nobel Prize; Gottfried Wilhelm Leibniz Prize; Research prize of the University of Münster
	Teaching award	Award for outstanding achievements in university teaching, academic supervision or school education	Archimedes-Preis; Ehrenmedaille of the Gesellschaft für Didaktik der Chemie und Physik (GDCP Ehrenmedaille); Goldener Brendel
	Prize for innovation or transfer achievements	Prize for research which advances innovation in economics or promotes societal participation in research	Deutscher Zukunftspreis; Sibylle-Hahne-Founders-Prize; Citizen Science Wettbewerb of the Universität Münster
	Science communication award	Award for contributions that bring research or research results closer to the public	KlarText – Preis für Wissenschaftskommunikation; Communicator Award – Science Award of the Donors' Association; Award for Science Communication - communicating.knowledge
	Other prize for academic achievements	Prize for other forms of academic or research activities. Prize is awarded to an individual or to groups of scientists; e.g. combined with earmarked money for specific research projects or as recognition of outstanding research group achievements	Aortenpreis of the Deutsche Gesellschaft für Gefäßchirurgie und Gefäßmedizin (DGG); vdek-Zukunftspreis; ESA Group Achievement Award
Prizes for young researchers	Award for the promotion of early career researchers	Award for scholars in their early career after graduating, frequently with age restrictions	Appointment as member of the Young Academy of the North Rhine-Westphalian Academy of Sciences; ERC Starting Grant; Förderpreis der Universitätsgesellschaft Münster

	Dissertation award	Award for an outstanding PhD thesis	Deutscher Studienpreis of the Körber Stiftung; Harry-Westermann Prize; Dissertation Prizes of the University of Münster
	Habilitation award	Award for an outstanding habilitation thesis	Wilhelm-Conrad-Röntgen-Preis; Preis der Westfälisch-Lippischen Universitätsgesellschaft
	Other prize for young scientists and scholars	Other prizes, also for students	Invitation to the annual Lindau Nobel Laureate Meetings; DAAD Prize for outstanding achievements of international students; Student Award of the University of Münster
Scholarships, fellowships and grants	Research fellowship	Granting of a scholarship for research work in a specific time period.	Marie Skodowska-Curie Postdoctoral Fellowship; Heisenberg Fellowship; Erstklassig! WWU Mentoring-Programm für Wissenschaftlerinnen
	Doctoral studentship	Granting of a scholarship to support PhD candidates for a specific time period	Kekulé Fellowship; Doctoral scholarships of the DAAD of the Studienstiftung des deutschen Volkes
	Travel grant	Granting of a scholarship to support travelling, e.g. for conference attendance or research activities abroad	Erasmus+ Gastdozentur; DAAD Kongressreisestipendium; Travel grant of the International Office of the University of Münster
	Other scholarship	Other types of academic scholarships which are granted for specific time periods, e.g. for studying purposes	Student scholarships of e.g. DAAD or Friedrich-Ebert-Stiftung; Language course scholarships
Publication prizes	Book prize	Prize for a scientific book publication	Tractatus – der Essaypreis des Philosophicum Lech; VHB Textbook Award; Textbook of the Year
	Prize for a journal article	Prize for a scientific article published in an academic journal	Karl-Thomas-Preis of the Deutsche Gesellschaft für Anästhesiologie und Intensivmedizin; AEJ Best Article Award of the Atlantic Economic Journal; Paper of the Month of the Medical Faculty of the University of Münster
	Prize for a conference paper	Prize for a scientific article which was presented at a conference and published	Best paper award of e.g. the European Academy of Management (EURAM) or the ACM SIGSPATIAL; Best Research Paper of the Gesellschaft für Arthroskopie und Gelenkchirurgie (AGA)
	Prize for a conference presentation	Prize for a scientific lecture which was held at a conference	Keynote Speaker Recognition Award of the IEEE Computer Society; Best Talk Award for Young Scientists of the European Dry Grassland Group (EDGG); Paul-Mellin-Gedächtnispreis of the Nordrhein-Westfälischen Gesellschaft für Urologie
	Poster prize	Prize for a poster which was presented at a conference and published	Best Poster Award of the Dachverband Reproduktionsbiologie und –medizin (DVR); Poster award of the Gesellschaft für Didaktik des Sachunterrichts (GDSU); Poster award of the Interdisciplinary Centre for Clinical Research (IZKF) Münster
	Prize for acting as reviewer or referee	Award for acting as a reviewer or referee for an academic journal or at a scientific conference	Reviewer of Excellence of the International Journal of Science Education (Taylor & Francis); BMVC Outstanding Reviewer Award of e.g. the British Machine Vision Association or the Internationale Tagung Wirtschaftsinformatik
	Other publication prize	Other distinction for a publication without predefined format or which is not covered by the categories listed above	Horst-Sendler-Preis of the Bundesverwaltungsgericht; IMRC Most Promising Research Presentation Award of the Interactive Marketing Research Conference
Personal honours and appointments	Honorary professor's degree	Appointment as honorary professor by a university	Professor Honoris Causa of the Ilia State University; Appointment as honorary professor at the National Taiwan Tech University of Science and Technology (NTUST)
	Honorary doctor's degree	Appointment as honorary doctor	Honorary doctorate of e.g. the Faculty of Theology of the University Zurich or the Faculty of History and Philosophy of th University of Münster
	Honorary membership	Appointment as honoray member in an academic society or scientific association	International Honorary Membership in the American Academy of Dermatology Association (AAD); Honorary Membership in e.g. the Deutsche Vereinigung für Sportwissenschaft (dvs) or in the Medical Women's International Association
	Membership of academy of sciences	Appointment as member of an academy of sciences, e.g. as full or corresponding member	Election as a member in the European Academy of Sciences (EURASC); Election as a Member of the German National Academy of Sciences Leopoldina; Election as a full member of the North Rhine-Westphalian Academy of Sciences, Humanities and the Arts
	Other personal honour or appointment	Other honour or appointment of an individuuum to award their merits in science or in public life	Verdienstmedaille of the German Society of Phoniatics and Pediatric Audiology (DGPP); Officer's Cross of Merit of the Federal Republic of Germany; Daidalos-Münze of the Studienstiftung des deutschen Volkes
Miscellaneous awards or honours	Other distinction	Other distinctions which are not covered by the categories above	Nannen-Preis; Best-Prac-tice-Wettbewerb Informations-kom-pe-tenz; Gleichstellungspreis of the University Münster

Managing distinctions

Distinctions, honours or awards received by e.g. scientists of the University of Münster are collected in the rubric "Distinctions". This includes

- internal university prizes and awards such as research, teaching, dissertation and transfer awards
- as well as prizes and honours awarded by external bodies, such as the Gottfried Wilhelm Leibniz Prize, honorary doctorates, doctoral studentships, admission to Academy of Sciences and best paper awards.

Both individual and multiple awardees from the University of Münster can be connected with the honour they received.

Content

- [Manage distinctions](#)
 - [Add a new distinction](#)
 - [Editing an existing distinction](#)
- [Edit the details of a distinction](#)
 - [Key information](#)
 - [Description](#)
 - [Thematic classification](#)
 - [Awarded activities](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of distinctions](#)
 - [Visibility of your distinction](#)

Manage distinctions

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Distinctions" (see Image 1a).

Add a new distinction

A new distinction can be added by clicking "Add new" in die upper right corner when you are on a list view page. Just click in die plus icon and choose "Distinction".

A new mask will open (see Image 1b). Here you select the [type of distinction](#) you want to add. The selected type will control the following editing mask and show necessary information. You see a short description of each distinction type next to the option. After selecting a distinction type you are directed to the editing mask.

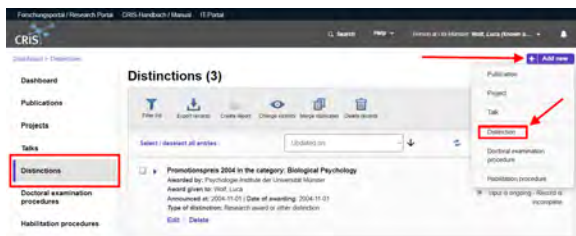


Image 1a: Distinction rubric and adding a new entry

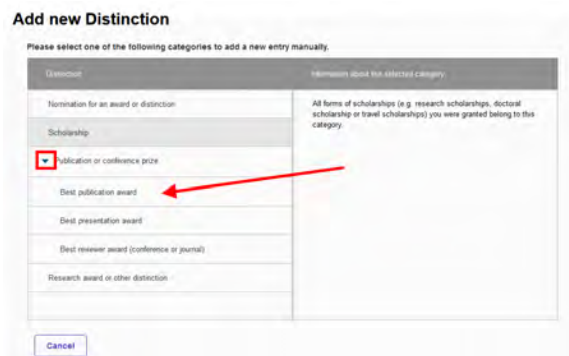


Image 1b: Select the type of distinction

Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing distinction

A distinction already existing in CRIS can be accessed:

- by clicking "Edit" at a distinction entry in the list view (Image 2a)
- or by clicking the distinction's title in the list and then choosing "Edit" in the upper right corner of the following distinction summary (Image 2b)

In the editing mask you can now edit the content of the distinction (for details see below).

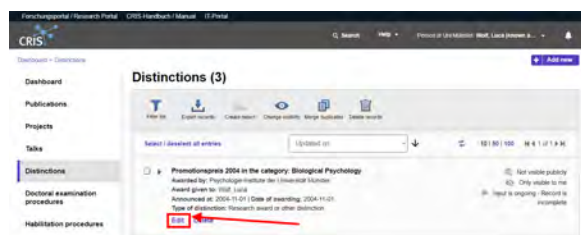


Image 2a: Edit via list view

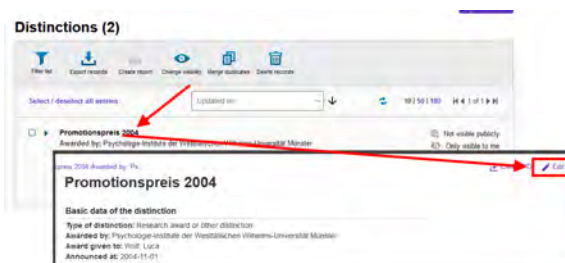


Image 2b: Edit via summary

Edit the details of a distinction

The editing mask for distinctions has up to three sections / tabs. These information have to be edited for each distinction. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics and may vary based on the [type of the distinction](#):

- **Type of distinction:** Please check if the selected type is correct or change the type accordingly. Depending on the [type](#), the next editing options may vary
- **Details about the received award / nomination:** The prize / award you received (or were nominated for) is related to the distinction entry. This prize is "independent" from year or honoured person - like the nobel prize, which is "a thing on its own" and is connected to a person and a year by the distinction:
 - To create this link, click on the white-plus-on-blue icon
 - Look for the name of the prize
 - If you found the correct prize, click on the plus icon in front of the prize. This creates the relation between prize and distinction
 - If you couldn't find the prize, check again the by browsing the alphabetically ordered list (e.g. check N for "Nobel prize")
 - If you want to change / correct a relation, just click on the dustbin icon next to the entry and choose the correct prize instead
 - If you couldn't find the prize by searching nor by checking the list, you can create a new prize entry by clicking the blue-plus-on-white icon:
 - You see a new mask with two tabs:
 - "Key information" asks for basic data of the prize like exact name or who the prize is awarded by and in which country they are located. Also [the type of award](#) and if the prizes is awarded by the University of Münster or an external organisation
 - "About the award" asks for additional information like sponsors of the award, description or websites
 - Best work your way from the top of a tab to its bottom
 - After you entered all information for this new prize entry, click on "Done" in the lower right corner and you will return to the editing mask for the distinction

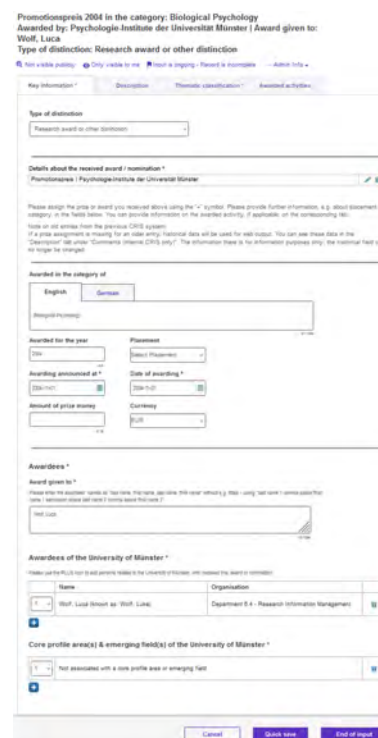


Image 3: Key information

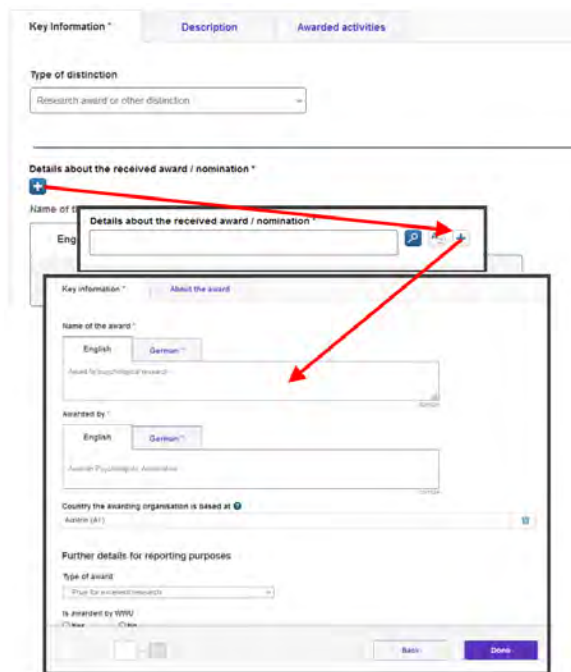


Image 4: Adding a new prize / award



Note on old entries from the previous CRIS system:

If a prize assignment is missing for an older entry, historical data will be used for web output. You can see these data in the "Description" tab under "Comments (internal CRIS only)". The information there is for information purposes only; the historical field can no longer be changed. If you want to update an old entry, please use this information to maintain the entry with the current data - e.g. to find the prize to be related or to add information on the placement.

- **Awarded / Nominated in the category:** Please describe category or topic for this distinction
- **Awarded / Nominated for the year:** This is an important piece of information, as the date of the award ceremony may be different to the year for the distinction. Please answer this field
- **Placement:** Please enter a distinction's placement here
- **Awarding / Nomination announced at and Date of awarding:** Please pay attention to possibly different dates for announcement and awarding (if asked for) of the distinction. These two dates are treated differently in reports. Of course, if announcement and awarding were e.g. during the same event, you can enter the same date in both fields
- **Amount of prize money:** Please enter the prize money and its currency. The prize money will not be published anywhere, it's only used for internal reports or statistics
- **Award given to / Nominees were:** In the text field all awardees / nominees have to be listed - no matter if they are affiliated to the University of Münster. Please enter the names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2"
- **Awardees / Nominees of the University of Münster:** Use the plus icon to add University of Münster affiliated awardees / nominees:
 - You are related by default when adding a new distinction
 - The system will automatically relate your first [card](#). This should be your current position - please check your [personal profile](#) if this is correct
 - Of course you can also select an ended card if the distinction was received during a former University of Münster position
 - If you want to relate another card than the one automatically related, just remove this one from the list and choose another one using the search function
 - ⚠ When you are working via [delegation](#) for another user, this person will be automatically connected to this entry. But if you are working in a [coordinating role for an organisation](#), no person will be connected! You have to manually add a person to this entry via the white-plus-on-blue-button (see below)
 - Other University of Münster awardees / nominees can also be found using the search function. Please relate all University of Münster persons involved (e.g. your colleague):
 - Click on the white-plus-on-blue icon
 - Look for your colleague using the search field or the "A to Z" list
 - If a person has multiple [cards](#), please make sure to choose the correct one
 - If you want to change a relation, just click on the dustbin icon next to the entry and choose the correct person / card instead

Description

Here you can enter additional information - like occasion or venue of the award ceremony. Or links to press releases covering the event or the distinction.

In "Comments & annotations" you can describe what was special about this distinction, like prize money was shared or this prize was awarded twice in this specific year. The data in this field will be published if the distinction is publicly visible.



Note on old entries from the previous CRIS system:

If a prize assignment is missing for an older entry, historical data will be used for web output. You can see these data in the "Description" tab under "Comments (internal CRIS only)". The information there is for information purposes only; the historical field can no longer be changed. If you want to update an old entry, please use this information to maintain the entry with the current data - e.g. to find the price to be related or to add information on the placement.

Thematic classification

From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications for this distinction on the 3rd tab "Thematic classification".

For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background
- You can display the areas of the research profile either alphabetically or hierarchically (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter distinctions awarded before 2024, you can also (additionally) relate the old core profile areas. For distinctions awarded 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Awarded activities

On the last tab, you determine the activities for which you were awarded for / nominated. In most cases these activities are already CRIS (e.g. publications). In addition, you can enter information in the "Other awarded activities" text field that is not maintained in CRIS - e.g. the title of a Master's thesis or a social commitment.

In the case of an "Best publication" or "Best presentation" award, the relation of the awarded work / talk is mandatory. For this purpose, the awarded work / talk must already be entered in CRIS and at least be visible within CRIS.

Please use the plus icon to search for and relate this content:

- Awarded publications
- Awarded talks or speeches
- Awarded projects
- Awarded doctoral examination procedures
- Awarded habilitation procedures

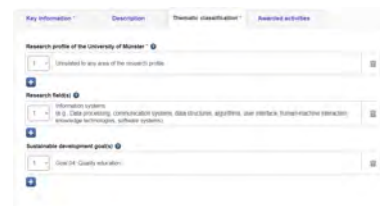


Image 5: Thematic classification

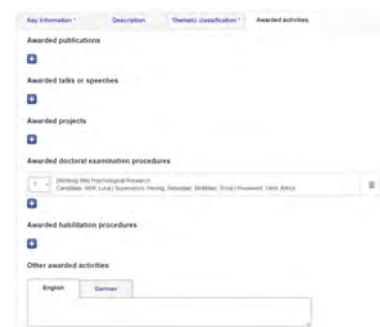


Image 6 Awarded activities

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.

Note: Relations work both ways

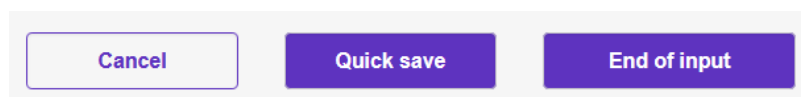
If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

Warning: Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the **status** for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information is missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of distinctions

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status is missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The **statuses** of distinctions are:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was **delegated editing rights for your data** or someone in a **coordinating role** can view this entry and edit it
- **Input finished - Record is complete:** After gathering all necessary information and wanting to make the distinction visible (within CRIS and / or to the public) you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process

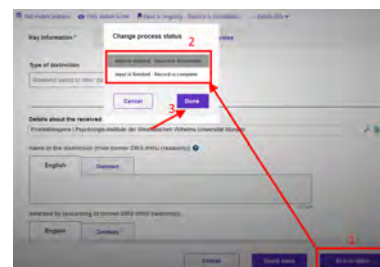


Image 7: Manage status of an entry

When saving into a new status, the system will check if all mandatory information for this specific status is / will be filled. If something is missing, this field will be marked in red. In the example the award is missing for the status "Input finished - Record is complete":



Image 8: Missing mandatory information

Visibility of your distinction

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. ⚠ To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

🕒 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)



Image 9: Manage visibility of an entry

Doctoral examination procedure

Pursuing a doctoral degree is listed in CRIS as "doctoral examination procedure" ("Promotionsverfahren" in German). At the end of this process is a finalised dissertation / doctoral thesis, which needs to be listed separately as "thesis" in your [publications](#).

CRIS differentiates three types of Doctoral examination procedures. The decisive factor for the type of the procedure is which university awards the title (or: which university logo appears on the certificate). Often the main supervision also takes place at this university and is supported in a cooperative doctorate by persons from other universities or organisations. The affiliation of the candidate is not necessarily with the title-awarding university (or other school):

- **Doctoral examination procedure at University of Münster:** The doctoral procedure is formally carried out at the University of Münster. The title or doctoral degree is awarded solely by the University of Münster
- **Doctoral examination procedure at another university** (NOT University of Münster): The doctoral procedure is formally carried out at another university (not the University of Münster). The title or doctoral degree is awarded solely by this other university
- **Joint doctoral procedure at University of Münster and another institution:** The doctoral examination procedure is formally carried out at the University of Münster as well as at least at one other university. The title or doctoral degree is awarded by both, the University of Münster and the other university. Cotutelle procedures are an example for this

CRIS does not collect data on doctorates which were completely supervised and earned at another university - like your own doctorate before coming to the University of Münster. Please note such a doctoral degree in your [personal profile's CV](#).

As both supervisors and candidate could edit an entry for doctoral examination procedure, this manual is meant for all University of Münster parties involved.

Content

- [Manage Doctoral examination procedures](#)
 - [Add a new doctoral examination procedure](#)
 - [Editing an existing doctoral examination procedure](#)
- [Edit the details of a doctoral examination procedure](#)
 - [Key information](#)
 - [Persons involved in this Doctoral examination procedure](#)
 - [PhD-Studies](#)
 - [Description](#)
 - [Topic and other details](#)
 - [Thematic classification](#)
 - [Related Content](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of doctoral examination procedures](#)
 - [Visibility of your doctoral examination procedure](#)

Manage Doctoral examination procedures

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Doctoral examination procedures" (see Image 1a).

Add a new doctoral examination procedure

A new doctoral examination procedure can be added by clicking "Add new" in the upper right corner when you are on a list view page. Just click in the plus icon and choose "Doctoral examination procedure".

A new mask will open (see Image 1b). Here you select the type of procedure you want to add:

- **Doctoral examination procedure at University of Münster:** The doctoral procedure is formally carried out at the University of Münster. The title or doctoral degree is awarded solely by the University of Münster
- **Doctoral examination procedure at another university** (NOT University of Münster): The doctoral procedure is formally carried out at another university (not the University of Münster). The title or doctoral degree is awarded solely by this other university
- **Joint doctoral procedure at University of Münster and another institution:** The doctoral examination procedure is formally carried out at the University of Münster as well as at least at one other university. The title or doctoral degree is awarded by both, the University of Münster and the other university. Cotutelle procedures are an example for this

The selected type will control the following editing mask and show necessary information. You see a short description of each type next to the option. After selecting a type you are directed to the editing mask.

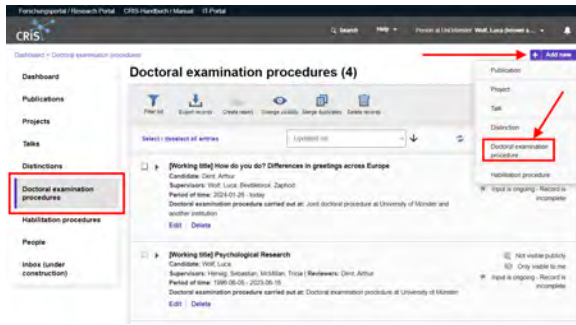


Image 1a: Doctoral examination procedure rubric and adding a new entry

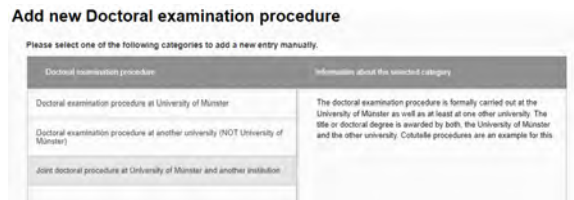


Image 1b: Select the type of procedure

Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing doctoral examination procedure

A procedure already existing in CRIS can be accessed:

- by clicking "Edit" at a procedure's entry in the list view (Image 2a)
- or by clicking the procedure's title in the list and then choosing "Edit" in the upper right corner of the following summary (Image 2b)

In the editing mask you can now edit the content of the doctoral examination procedure (for details see below).

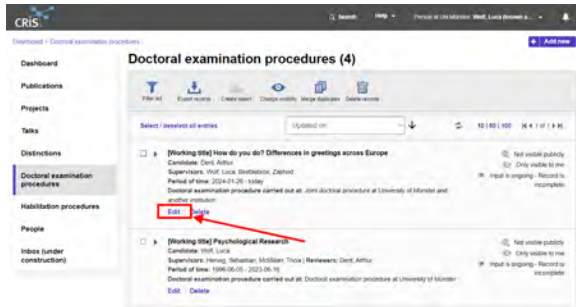


Image 2a: Edit via list view

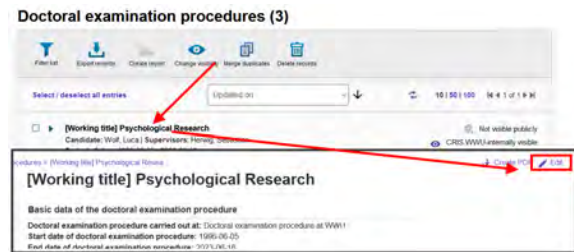


Image 2b: Edit via summary

Edit the details of a doctoral examination procedure

The editing mask for doctoral examination procedures has up to four sections / tabs. These information have to be edited for each procedure. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics:

- **Doctoral examination procedure carried out at:** Please check if the selected type is correct or change the type accordingly. Depending on the type, the next editing options may vary
- **University of graduation:** For candidates from another university or joint procedures, please note the university of graduation / the degree-awarding university

- For joint doctoral procedures:
 - Joint or doubled degree: In the case of a joint degree, there is only one doctoral degree, which is awarded jointly by both universities (possibly also only one certificate). In the case of a double degree, each of the participating universities awards a doctoral degree
 - For a Joint Degree: What kind of joint programme? One example of a joint degree is the Cotutelle procedure. Please note: Normally only one doctorate is awarded in Cotutelle procedures. It may be that the title has different terms and each university issues its own certificate. In this case, please select "Joint Degree" in the question before this one
- **Title / topic of the doctoral examination procedure:** Please note title or topic of the procedure in at least German, best English and German. You can of course edit the title if it is changed during the procedure - check "Title / topic is working title" if necessary
 - When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that it may be a duplicate. For further information, see [Side note: Managing duplicates](#).
 - **!** Please note: *For bilingual input fields like this one, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates*
 - If your doctoral procedure took place in a language other than English or German, enter the e.g. French title in the "German" field (this is a mandatory field). If the procedure was multilingual, enter the German title in "German" and the French title in "English", for example
- **Start date of doctoral examination procedure:** The start date is mandatory as soon as the procedure started. The procedure officially begins on the date of the letter confirming the acceptance as a doctoral candidate
 - If you do not know the start date, please do an "educated guess". If you e.g. know that the start date was "somewhen in 2020", please enter a date in 2020. If you do not have any information on the start date, please keep in mind for your guess that the average duration of a doctoral examination procedure is 4 - 5 years
- **End date of doctoral examination procedure:** The end date is not mandatory until the procedure is completed. This way you can enter and publish ongoing procedures. **Important:** Please remember to actively enter the end date to mark a doctorate as completed

Image 3a: Key information: Procedure at University of Münster

Persons involved in this Doctoral examination procedure

! At least one person affiliated to the University of Münster has to be related to this procedure with their **card**. If you save without relating any card as candidate / supervisor / reviewer, you will lose all editing rights to this entry and see an error message. Please contact cris@uni-muenster.de if this happens to get yourself related to this entry.

Remember: CRIS does not collect data on doctorates which were completely supervised and earned at another university - like your own doctorate before coming to the University of Münster. Please note such a doctoral degree in your [personal profile's CV](#).

- **Doctoral candidate:**
 - **Name of the doctoral candidate:** Please enter the candidate's name as "last name, first name". This is especially important for someone not located at the University of Münster
 - Please note that a relation either to the University of Münster or an external organisation is mandatory:
 - **Doctoral candidate at University of Münster:** Most candidates already have a CRIS profile because they e.g. work at the University of Münster. Please link such a profile to this procedure using the plus icon
 - If your doctoral candidate does not have a CRIS profile / card (e.g. scholarship holders), please contact us via mail cris@uni-muenster.de with their Uni / University ID as well as their position and when this position started. We will set up an account plus the according card
 - **External university / organisation of the candidate (NOT University of Münster):** If this person is not affiliated to the University of Münster but to another university, university of applied sciences or other organisation, please relate the respective organisation. Please select the overall organisation - e.g. the university, not the department or institute. If this is not possible, please choose "(external organisation unknown)"
- **Supervisors / Mentors:**
 - **List of all supervisors:** In the text field all supervisors have to be listed - no matter if they are affiliated to the University of Münster. Please enter the names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2"

Image 3b: Key information: Procedure at another university

- **Supervisors at University of Münster:** If someone affiliated to the University of Münster is supervising the procedure (no matter if as main supervisor or in a cooperative procedure), please link this person's CRIS profile to the procedure, using the plus icon. After relating this profile, please remember to select the role of the supervisor within the procedure. If in doubt, please check the doctoral regulations for this procedure



- **Supervision at another university / organisation:** For persons at other universities, universities of applied sciences or other organisations, please relate the respective organisation. Please select the overall organisation (e.g. the university, not the department) at which the supervision took place. If this is not possible, please choose "(external organisation unknown)"
 - After relating another organisation, please remember to select the role of this organisation's supervisor within the procedure

- **Reviewers (for procedures at University of Münster):**

- **List of all reviewers:** In the text field all reviewers have to be listed. Please enter the names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2"
- **Reviewers at University of Münster:** If someone affiliated to the University of Münster is reviewing the procedure or thesis, please link this person's CRIS profile to the procedure, using the plus icon
- **Reviewing at another university / organisation:** For persons at other universities, universities of applied sciences or other organisations, please relate the respective organisation. Please select the overall organisation (e.g. the university, not the department) at which the reviewing took place. If this is not possible, please choose "(external organisation unknown)"



Image 3c: Key information: Joint procedure

PhD-Studies

For procedures at the University of Münster, please add a doctoral subject, awarding faculty and the kind of doctoral degree pursued.



Image 4a: PhD-Studies for Procedure at University of Münster

For procedures at another university, you can note doctoral degree and course of doctoral studies in the text field on this tab.



Image 4b: PhD-Studies for Procedure at another university

For joint procedures, please enter at least the information relating to the University of Münster - e.g. the awarding faculty. You can add information on the second university involved in the relevant fields. If there is a joint certificate from the participating universities, enter the joint date of the certificate award in the first date field. If there are two certificates and therefore also two award ceremonies, enter the date of the award ceremony in Münster in the first field and that for the second university in the second field.

Image 4c: PhD-Studies for a joint procedure

Description

Topic and other details

Please describe the topic of the doctoral examination procedure in a short summary. You can do this in English and / or German.

Please remember to check the form of the doctoral thesis (further information see [here](#)):

- *cumulative*: Also known as publication-based. Consists of a series of papers published or submitted for publication plus an overarching argument on the topic. The number and weighting of papers is determined by the doctoral regulations of each faculty
- *monographic*: The "classical" thesis as a book on one specific topic. Size and further criteria are determined by the doctoral regulations of each faculty

You can also relate the (main) language of the thesis.

Thematic classification

From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory for Uni Münster and joint procedures - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications also on the tab "Description".

For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background
- You can display the areas of the research profile either alphabetically or hierarchically (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol

Image 5: Topic as well as thematic classification (example is a joint procedure)

- If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
- If you enter procedures ending before 2024, you can also (additionally) relate the old core profile areas. For procedures ending 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Related Content

On the last tab for procedures at the University of Münster you can related other CRIS content which is connected to your doctoral examination procedure. For example, if you did your research in the context of a larger project. Or if you received a distinction for your work. Please use the plus icon to search for and relate this content:

- Publications resulting from doctoral examination procedure - **i** Please remember to add the thesis as a publication and relate both publication and procedure
- Talks held during the doctoral examination procedure
- Projects in which the doctoral examination procedure takes/took place
- Distinctions received for doctoral examination

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.

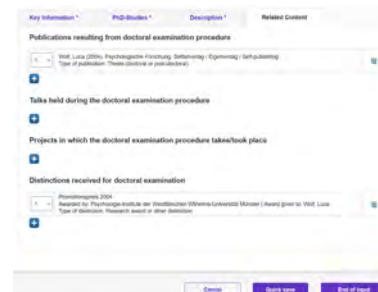


Image 6: Related Contents



Note: Relations work both ways

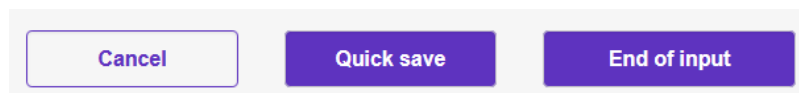
If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

! Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes
- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the **status** for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of doctoral examination procedures

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The **statuses** of doctoral examination procedures are:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was **delegated editing rights for your data** or someone in a **coordinating role** can view this entry and edit it

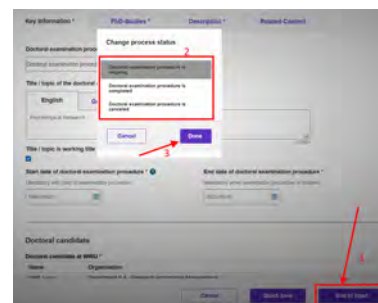



Image 7: Manage status of an entry

- **Doctoral examination procedure is ongoing:** After this procedure started and should be visible e.g. in candidate's and supervisor's profile (within CRIS and / or to the public), you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process
- **Doctoral examination procedure is completed:** After a procedure is successfully completed, you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process.  Please remember to add the thesis as a publication and relate both publication and procedure
- **Doctoral examination procedure is canceled:** It may happen that a procedure was cancelled. To show this, you can select this status. The visibility of the entry can still be managed in a second process

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the GERMAN title is missing for the status "Doctoral examination procedure is ongoing":




Image 8: Missing mandatory information

Visibility of your doctoral examination procedure

The [visibility](#) of an entry affects two different levels:


- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric.  To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)
- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

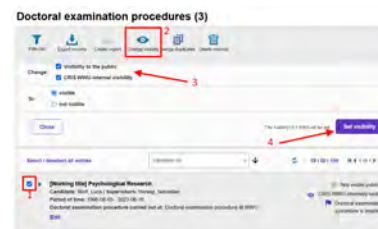


Image 9: Manage visibility of an entry

Habilitation procedure

Pursuing a postdoctoral degree / habilitation and therefore the "Venia legendi" for a subject is listed in CRIS as "habilitation procedure" ("Habitationsverfahren" in German). At the end of this process is a finalised thesis (in Germany this special form of thesis is called "Habilitationsschrift"), which needs to be listed separately as "thesis" in your [publications](#).

CRIS differentiates two types of habilitation procedures. The decisive factor for the type of the procedure is which university awards the venia legendi (or: which university logo appears on the certificate). Often the main supervision also takes place at this university and is supported by persons from other universities. The affiliation of the candidate is not necessarily with the awarding university:

- Habilitation procedure at University of Münster: The habilitation procedure is formally carried out at the University of Münster. The venia legendi is awarded solely by the University of Münster
- Habilitation procedure at another university (NOT University of Münster): The habilitation procedure is formally carried out at another university (not the University of Münster). The venia legendi is awarded solely by this other university

CRIS does not collect data on habilitations which were completely reviewed and earned at another university - like your own habilitation before coming to the University of Münster. Please note such a degree in your [personal profile's CV](#).

As both mentors / reviewers and candidate could edit an entry for habilitation procedure, this manual is meant for all University of Münster parties involved.

Content

- [Manage Habilitation procedures](#)
 - [Add a new habilitation procedure](#)
 - [Editing an existing habilitation procedure](#)
- [Edit the details of a habilitation procedure](#)
 - [Key information](#)
 - [Description](#)
 - [Topic](#)
 - [Thematic classification](#)
 - [Related Content](#)
- [Save and publish your data entry](#)
 - [Saving your data](#)
 - [Status of habilitation procedures](#)
 - [Visibility of your habilitation procedure](#)

Manage Habilitation procedures

Please [log in to CRIS](#). On the start page / dashboard you get an overview of all data available to you. In the left navigation bar you can jump to the CRIS rubric you want to edit data in - here "Habilitation procedures" (see Image 1a).

Add a new habilitation procedure

A new habilitation procedure can be added by clicking "Add new" in die upper right corner when you are on a list view page. Just click in die plus icon and choose "Habilitation procedure".

A new mask will open (see Image 1b). Here you select the type of procedure you want to add. The selected type will control the following editing mask and show necessary information. You see a short description of each type next to the option. After selecting a type you are directed to the editing mask.

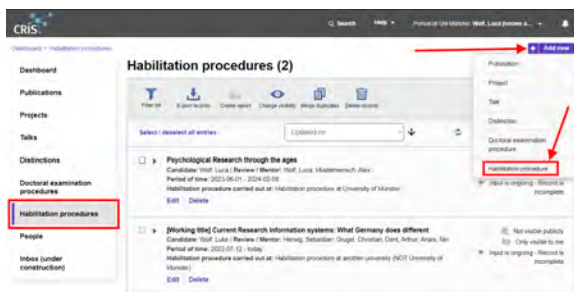


Image 1a: Habilitation procedure rubric and adding a new entry

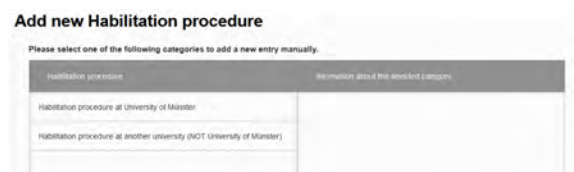


Image 1b: Select the type of procedure



Note: Search first, add later

Note: Before creating an entry (e.g. a publication), please check whether this data was already entered to the system by a colleague, e.g. when several researchers affiliated to the University of Münster authored one publication. In your personal CRIS account you will only see the data entries listed which are already related to you (or to your organisation if you are in a [coordinating role](#)) - e.g. all publications related to you. But you can use the [global search](#) to check all entries visible within CRIS and look for e.g. a certain publication title. If there is a publication you contributed to, please ask for being related to this publication instead of adding a duplicate entry.

Editing an existing habilitation procedure

A procedure already existing in CRIS can be accessed:

- by clicking "Edit" at a procedure's entry in the list view (Image 2a)
- or by clicking the procedure's title in the list and then choosing "Edit" in the upper right corner of the following summary (Image 2b)

In the editing mask you can now edit the content of the habilitation procedure (for details see below).

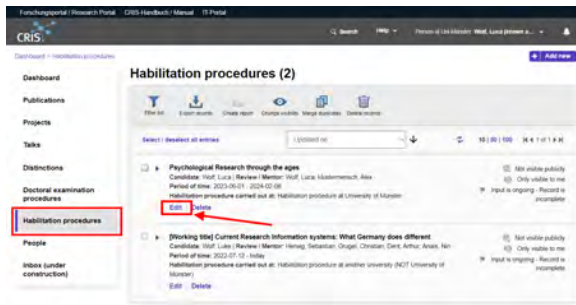


Image 2a: Edit via list view

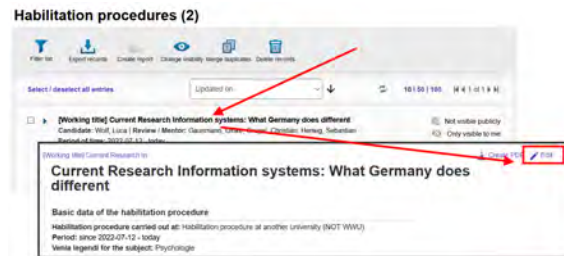


Image 2b: Edit via summary

Edit the details of a habilitation procedure

The editing mask for habilitation procedures has up to three sections / tabs. These information have to be edited for each procedure. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Key information

All key details need to be entered on the first tab. Best work your way from the top of a tab to its bottom. Mandatory fields are marked either by a hint or by an asterisk *. If mandatory information are missing for a certain status, the missing information will be marked in red after defining the status and saving (see below for more information).

⚠ Please note: Even if the mask's language is English, German is still the leading system language. Multi-language input fields like title therefore need to be answered both in English and German as only the German text is accepted as mandatory input.

Information are structured based on topics:

- **Habilitation procedure carried out at:** Please check if the selected type is correct or change the type accordingly. Depending on the type, the next editing options may vary
- **Title / Topic of the Habilitation procedure:** Please note title or topic of the procedure / thesis in at least German, best English and German. You can of course edit the title if it is changed during the procedure - check "Title / topic is working title" if necessary
 - When adding a new entry, the system will check if there is another entry with exactly this title. It will warn you that is may be a duplicate. For further information, see [Side note: Managing duplicates](#). **ⓘ Please note:** For bilingual input fields like this one, only the content of the German field is checked for duplicates. German is the leading language of the system, therefore only the German field is checked for mandatory data and duplicates
- **Start date of procedure:** The start date is mandatory as soon as the procedure started. If you do not know the start date, please do an "educated guess". If you e.g. know that the start date was "somewhen in 2020", please enter a date in 2020. If you do not have any information on the start date, please keep in mind for your guess that the average duration of a habilitation procedure is 4 - 5 years

Image 3a: Key information: Procedure at University of Münster

End date of procedure: The end date is not mandatory until the procedure is completed. This way you can enter and publish ongoing procedures. **Important:** Please remember to actively enter the end date to mark your habilitation as completed

Awarded by faculty / Venia legendi for the subject: For procedures at the University of Münster, you can select the awarding faculty. For procedures at another university, you can add the university of graduation. For both types of procedures you need to note the subject in the text field

⚠ **At least one person affiliated to the University of Münster has to be related to this procedure with their card - either as candidate and / or reviewer. It is not possible to save this procedure without a connection to the University of Münster. If case of doubt, please contact cris@uni-muenster.de.**

Candidate for habilitation:

- **Name of the candidate for habilitation:** Please enter the candidates name as "last name, first name". This is especially important for someone not located at the University of Münster
- Please note that a relation either to the University of Münster or an external organisation is mandatory:
 - **Candidate for habilitation at University of Münster:** Most candidates already have a CRIS profile because they e.g. work at the University of Münster (if not, please contact us at cris@uni-muenster.de). Please link such a profile to this procedure using the plus icon
 - If your candidate does not have a CRIS profile / card (e.g. scholarship holders), please contact us via mail cris@uni-muenster.de with their Uni / University ID as well as their position and when this position started. We will set up an account plus the according card
 - **External university / organisation of the candidate (NOT University of Münster):** If this person is not affiliated to the University of Münster but to another university, university of applied sciences or other organisation, please relate the respective organisation. Please select the overall organisation - e.g. the university, not the department or institute. If this is not possible, please choose "(external organisation unknown)"

Mentoring / reviewing:

- **List of all mentors / reviewers:** In the text field all mentors / reviewers have to be listed. Please enter the names as "last name, first name; last name, first name" without e.g. titles - using "last name 1 comma space first name 1 semicolon space last name 2 comma space first name 2"
- **Reviewers / committee are confidential:** Please check this box if the names of mentors / reviewers / committee members etc. are confidential, according to the habilitation regulations
- **Mentoring / reviewing at University of Münster:** If someone affiliated to the University of Münster is mentoring / reviewing the thesis (no matter if as mentor, reviewer or supporting someone from another university), please link this person's CRIS profile to the procedure, using the plus icon
 - Please note that relating at least one University of Münster mentor / reviewer is mandatory for procedures at another university
 - After relating a University of Münster profile, please remember to select the role of the mentor / reviewer within the procedure. If in doubt, please check the habilitation regulations for this procedure
- **Mentoring / reviewing at another university / organisation:** For persons at other universities, universities of applied sciences or other organisations, please relate the respective organisation. Please select the overall organisation (e.g. the university, not the department) at which the reviewing or mentoring took place
 - After relating another organisation, please remember to select the role of this organisation's mentor / reviewer within the procedure

Image 3b: Key information: Procedure at another university

Description

Topic

Please describe the topic of your habilitation procedure in a short summary. You can do this in English and / or German.

Thematic classification




From spring 2024 on, CRIS will have [three systems for the thematic classification of research activities](#):

- Research profile of the University of Münster (mandatory for Uni Münster procedures - replaces the core profile areas and emerging fields)
- Fields of Research according to KDSF standard (mandatory from end of May 2024 on)
- Sustainable Development Goals of the UN (SDGs)

To simplify the process for you, you can define one category for each classification system in your [personal profile](#) (see "Thematic classification" for details) that is automatically added to (new) entries as soon as your card is linked to the entry.

Otherwise, you can edit the classifications also on the tab "Description".


For example, to select at least one area from the research profile, proceed as follows:

- Click on the white plus on blue background 
- You can display the areas of the research profile either alphabetically  or hierarchically  (here you can expand the impact areas using the arrow symbol). Alternatively, you can also enter a term in the search field and wait a moment for the system to make suggestions
- Once you have found the area you are looking for, add it to your entry by clicking on the plus symbol
 - If none of the profile areas apply, please select the category "Unrelated to any area of the research profile"
 - If you enter procedures ending before 2024, you can also (additionally) relate the old core profile areas. For procedures ending 2024 or later, please only use the current Impact Areas
- You can use the dustbin symbol to the right of the entry to remove this area and link another one to your entry

This logic is the same for the research fields according to the KDSF standard and the UN Sustainable Development Goals.

Related Content


On the last tab for University of Münster procedures you can relate other CRIS content which is connected to your habilitation procedure. For example, if you did your research in the context of a larger project. Or if you received a distinction for your work. Please use the plus icon to search for and relate this content:

- Publications resulting from habilitation procedure -  Please remember to add the thesis as a publication and relate both publication and procedure
- Projects in which the habilitation procedure takes/took place
- Distinctions received for habilitation

After adding content, you can remove this entry's connection using the dustbin icon next to it. Of course only the connection is removed, not the data entry itself.

Note: Relations work both ways

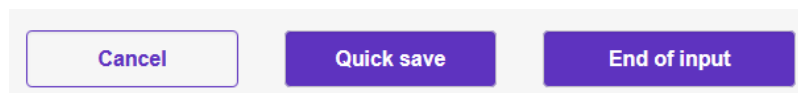
If you relate content, this relation works both ways. For example, when connecting a project to your publication, you see a similar connection to this publication in the project's mask. If you remove the connection on one side, it is also removed for the other side of the connection.

 Content to be related has to be on a status like "Input finished - (...)" and at least visible within CRIS.

Save and publish your data entry

Saving your data

When working on your data, you can jump between the different tabs of the data entry mask without losing information. But there is no automatic saving - so as soon as you leave a data entry mask, you will lose your information. To prevent data loss you need to actively save your data. Saving is done via three buttons on the lower right part of a data entry mask:



- The button "Cancel" allows you to leave the mask without saving any information or changes



Image 4: Description as well as core profiles areas

- The button "Quick save" allows you to save your data and changes at any time without leaving the mask and without triggering a data validation. We recommend quick saving every few minutes to prevent data loss. You can continue working on (quick) saved data at any time when returning to this specific data entry
- Clicking the button "End of input" opens a selection menu where you can choose the [status](#) for your entry. Selecting a status triggers a data validation which checks if all mandatory fields are filled. The system will inform you which information are missing for a specific status
- Confirm your status selection by clicking "Done". You will return to the list view

Status of habilitation procedures

The status is to be set actively each time you click on the violet "End of input" button at the bottom right of the mask while editing an entry (step 1 in the example on the right). A new window opens in which you can select a status (step 2 in the example on the right). Use the violet button "Done" to confirm the selection of the status (step 3 in the example on the right). If mandatory information for this status are missing, the system will indicate this - see below. If the status is successfully set, you will return to the list view of the rubric.

The [statuses](#) of habilitation procedures are:

- **Input is ongoing - Record is incomplete:** This status is meant for new data entries. Mandatory answers are not required yet. You can use this status to work on your entry gradually and enter all information in different sessions. An entry in this status cannot be made visible (neither within CRIS nor to the public) - only you or someone who was [delegated editing rights for your data](#) or someone in a [coordinating role](#) can view this entry and edit it
- **Habilitation procedure is ongoing:** After this procedure started and should be visible e.g. in candidate's and reviewer's profile (within CRIS and / or to the public), you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process
- **Habilitation procedure is completed:** After a procedure is successfully completed, you select this status. The status will check if all mandatory fields are answered and points out which information may be missing. After revising the missing data, this status will be accepted. Of course you can still edit the answers in this entry, but you can not change the status back to the step before. The visibility of the entry will be managed in a second process. **i** Please remember to add the thesis as a publication and relate both publication and procedure

When saving into a new status, the system will check if all mandatory information for this specific status are / will be filled. If something is missing, this field will be marked in red. In the example the GERMAN title is missing for the status "Habilitation procedure is ongoing":



Image 6: Missing mandatory information

Visibility of your habilitation procedure

The [visibility](#) of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore in the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

The visibility of an entry is not controlled via the editing mask of the individual entry, but in the [list view](#) of the entry's rubric. **!** To do this, all mandatory fields for the selected status have to be answered. To change a entry's visibility:

- Select the data entry for which you want to change the visibility by checking the box in front of the record. If you want to select multiple records, you can do this accordingly
- Now click on the "eye" icon in the tool bar. A new menu for configuring the visibility opens
- Change: By checking the boxes in front of the two visibility level you confirm that the following action will affect the selected visibility level(s)

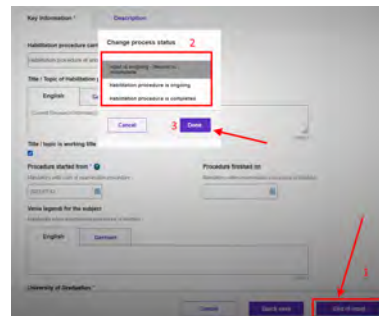


Image 5: Manage status of an entry

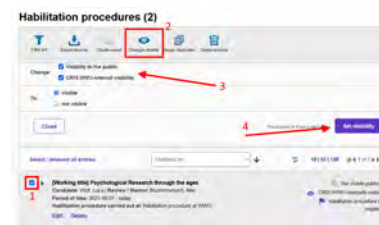



Image 7: Manage visibility of an entry

- To: Here you select if the talk should be visible / not visible on the selected visibility level
- You confirm this setting by clicking "Set visibility"
 - "Close" will close this menu without setting / changing the record's visibility. You can cancel the process this way

Please note:

- Please note: If your personal profile is not publicly visible, this may affect the visibility of publications, talks, projects etc. you are connected to via your [card](#). If a person is not publicly visible, so is the card and relations from this card to other content. The content itself like a publication may still be visible, but it is no longer linked to the person

 After allowing the public visibility of an entry, it will take several hours until this entry is visible in the internet (e.g. on your automatic profile in the [research portal](#)) or usable to CMS like [Imperia](#) or the [CMS of the FB04](#)

Imperia, websites and CRIS

"Maintained once, used many times": CRIS aims to use information on persons, projects, publications etc. in multiple contexts. To do this, you manage your data in CRIS and CRIS offers this data via interfaces to other digital tools. One of these tool is Imperia, the University of Münster's main Content-Management-System (CMS), with which almost all Uni websites are created, structured and edited. Some institutes like Geoinformatics or departments like Business and Economics use their own CMS tools. The following instruction are for Imperia usage only.

To use CRIS data in Imperia a so called "Flexmodul" (flex module) was developed. This module fetches your CRIS.WW data and integrates it in Imperia managed websites. If you e.g. add a new publication to CRIS, the module will take care of transferring the publication details to your institute's website.


Please note: This instruction assumes that you know the basic steps in Imperia and are logged in. A comprehensive [Imperia manual](#) and trainings can be found [on the CIT's web pages](#). Please be aware that you also need editing rights in Imperia, which you can request from CIT or apply for in your university's IT Portal.

Content

- [Add the "Flexmodul" to a website in Imperia](#)
- [Entry point](#)
- [Information from CRIS on a Person](#)
 - [Selecting the information to be included](#)
 - [Include contact data](#)
 - [Integrate curriculum vitae \(CV\)](#)
 - [Integrate publications](#)
 - [Integrate projects](#)
 - [Include awards, dissertations and habilitations](#)
 - [Side note: Integrating courses \(HIS-LSF\)](#)
- [Information from CRIS on a Project](#)
- [Information from CRIS on an organisation of the University of Münster](#)
- [Side note: Editing and publishing an Imperia page](#)
- [Note on automatic updating of web pages](#)

Add the "Flexmodul" to a website in Imperia

After logging in to Imperia, you can open your website in edit mode.

Using the function "Add module"  (light grey bar of an existing section, hover with your mouse over the right side of this bar) or using the option "Add flex" below an existing section will open a selection of available modules. Choose "Forschungsdatenbank einbinden" / "Integrate research database".

You can change the position or details of your new module at any time in the Imperia settings of this page.

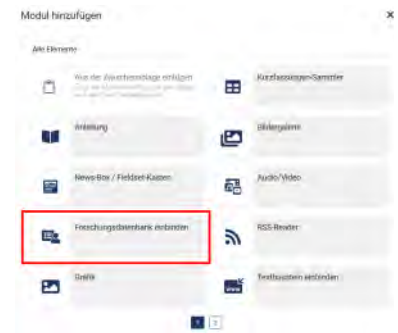


Image 1: Choose flex module "Forschungsdatenbank einbinden"

Entry point


Imperia needs an entry point for fetching data from CRIS. This entry point may be

- a single person
- a single project
- a institute / Einrichtung of the University of Münster

All CRIS data available to this person like CV or publications can now be integrated to the website. We will use a single person to walk you through the steps.

Important: Visibility in CRIS

Persons and projects, just like the associated data, must have a "completed" [status](#) AND must be [publicly visible](#) in CRIS.

 Persons, who are new at the University of Münster, are always not publicly visible for data protection reasons. This has to be changed actively - for more information see "Visibility of your profile" [here](#).

Information from CRIS on a Person

Select "Person" as the type of the entry point (Image 2).

Please take care that "CRIS" is selected as data source. If you want to integrate data on your seminars, courses or lectures, please select "HIS-LSF" - which we will not cover here.

Then write the name of the person in the text field for whom you want to include content. The system will automatically suggest people or projects (this may take some seconds, please be patient).

Please note that the suggestions do not refer directly to a person, but to the affiliation of a person with an institution (the [CRIS card](#)). If a person belongs to several institutions, please select the affiliation or card for which information is to be included.



Image 2: Selecting the type of the entry point

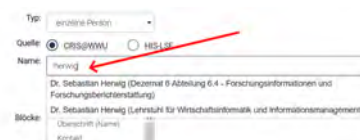


Image 3: Choosing a person as entry point

Selecting the information to be included

After you have selected and specified the person / their [card](#) from the suggestion list, you can select which information are to be included (Image 4).

By selecting the topic blocks from the list you decide which CRIS content will be integrated. If you want to select more than one topic, just hold the STRG/CTRL key on your keyboard while clicking on the topics with your mouse (see 1. in Image 4). For some of these topics another option menu will appear, e.g. for "Academic education".

In CRIS, publications, projects, awards, doctorates and habilitations are not directly linked to a person, but to a [card](#), i.e. a person's affiliation with an institution. Using the option "The information relates to" (see 2. in Image 4), you can specify whether

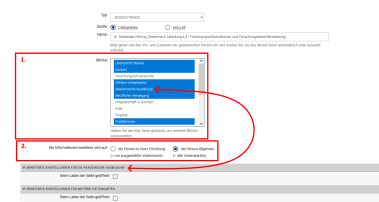



Image 4: Selecting the information to be included for the person

- "die Person in einer Einrichtung = nur ausgewählte Visitenkarte": Only the content associated with the card selected at the beginning is to be included. Here, for example, only publications are included that are linked to exactly this card - in the example for Mr. Herwig, only the publications that he published during his affiliation to Department 6.4. This can be important if you only want to display the publications from exactly this institute on the institute website
- "die Person allgemein = alle Visitenkarten": All content of all cards of the person are to be displayed. If you select this option ("the person in general = all cards"), all content of this person will be collected and appear in the profile of a person - in the example for Mr Herwig, all publications from his time at the University of Münster, both at the Institute of Information Systems and in Department 6.4. We recommend these settings because they ensure that your data is always complete across all cards. And only this way all CRIS data for a certain person will be displayed on the person's website

Include contact data

When the "Contact data" block is selected, the address and contact data stored for a person as well as the profile picture are displayed. Please note that only the address for your institution (to which you are connected by your card) is available here. All other contact data like your email address, phone number or consultation hours are managed in your card within your [personal profile](#).

If you belong to several Uni Münster organisations, you can display links to the other profile pages via the "weitere Visitenkarten" block. Please note that only cards that are "active" and in which an Internet address has been entered under "URL" are taken into account here. If no internet address is in "URL", the website of the organisation linked to this card is used.

 If you added information on external profiles to your [CRIS profile](#), they will be linked via the platforms' icons - e.g. as "Academic profiles"



Integrate curriculum vitae (CV)

By selecting the blocks "Research focus", "Academic training", "Professional career", "Membership in committees" or "Appointments", the CV data stored in CRIS's [personal profile](#) can be integrated. Each of these blocks comes with its own options where you can decide if this block is "open" when someone reads your website or has to be opened by a click.

Future additions or changes need to be done directly in your data in CRIS. The information is automatically transferred to Imperia and in most cases also updated on the website (see below for details).

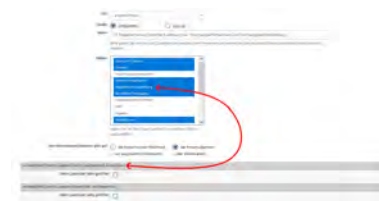


Image 5: Integrating CV details

Integrate publications

You can use the "Publications" block to show a list of publications. Once you have selected the information block, you can decide whether the information should refer to your person in an institution (= the card you selected) or to all information about your person (= all your cards). This way, you can specifically assign publications to an organisational unit and, by selecting "the person in general", combine all information about your person on one web page.

Via **Advanced settings** for publications you can now select different grouping and filtering options for displaying your publications.

- With **Links** you can specify whether the title of the publication should be displayed as a link to the [research portal](#) or to the full text URL specified in the publication's details. Regardless of this, the specified DOI is also displayed and linked for all publications
- Under **Scope** you can choose to present all publications or only a selection, that you defined as "*Featured content*" in your [CRIS profile](#). If all data is displayed, this "*Featured content*" selection will be automatically presented in addition to the full list
- The **Grouping** option can be used to specify that the publication list should be displayed grouped by e.g. 1. publication year, 2. [publication type](#)
 - For publications, you can also specify that only certain [types of publications](#) are to be displayed, and in which order. To do this, you can move the individual publication types with the mouse (drag & drop) or (de)activate them by clicking
 - You can also specify if you want to group or filter by publication type (see the red rectangle in the bottom of image 6)
- If you want only a selection of current publications to appear on the web page, you can specify the desired number using the **Limit** option. Based on the year or date of publication, the desired number of recent publications is automatically selected and continuously updated
- Via the option **Mark authors** you can specify whether and in which form authors from the University of Münster are highlighted. In addition to the boldfacing of the author's name, they can also be linked. When linking, the web address is used that is stored in the respective [card](#) of the person linked to the publication. Furthermore, you can specify whether only the name of the initially selected person or the names of all authors linked to the publication should be highlighted. In exceptional cases, the highlighting may not be displayed correctly - e.g. a part of the name is not highlighted. To enable marking, the authors field from the [publication's editing mask](#) is matched with the names (first name, last name, maiden name) of the persons linked to the publication. For the mechanism to work, it is therefore necessary that the [specified structuring method](#) is followed when specifying the authors for a publication. Furthermore, the spelling of the name in the corresponding person profile should match the spelling of the name in the authors field



Image 6: Integrate publications and decide on their display options

Future additions or changes need to be done directly in your data in CRIS. The information is automatically transferred to Imperia and in most cases also updated on the website (see below for details).

i Sorting of publications: Imperia sorts publications according to their publication date (optional in CRIS). If no publication date is set for a publication in CRIS, Imperia assumes the date "01.01.YYYY" for the publication year (mandatory in CRIS). If you want to influence the sorting in Imperia, please maintain the publication date in CRIS in addition to the publication year.

Integrate projects

Similar to publications, information on projects can also be grouped. Currently, you can only group projects by project status (e.g. ongoing, completed). You can also specify whether the project title should be displayed as a link and what this link should point to - the entry in the research portal or a URL specified for the project (e.g. the project website). Under Scope you can choose to present all projects or only a selection, that you defined as "*Featured content*" in your [CRIS profile](#). If all data is displayed, this "*Featured content*" selection will be automatically presented in addition to the full list.

To make the display of projects clearer, the selection can be limited to current projects.

If you want to display only projects in which you have a specific role (e.g. project manager, spokesperson), you can define a filter for this. Simply select the relevant role in the list. If you do not select a role, all projects in which you are or were involved according to CRIS will be displayed. To delete the selection completely, click on the selected checkboxes and remove the selection.

Future additions or changes need to be done directly in your data in CRIS. The information is automatically transferred to Imperia and in most cases also updated on the website (see below for details).

Include awards, dissertations and habilitations

Similar to publications and projects, you can also show lists of distinctions / received awards (the block "Awards" does not get its own section, but will be part of the CV section), of supervised doctoral theses (block "Supervised doctoral theses") and supervised habilitations (block "Supervised habilitations") as well as information about the qualifications you have completed (blocks "Own doctoral thesis" and "Own habilitation").

The list of supervised dissertations and habilitations contains only those procedures in which the specified person is linked as a supervisor and / or reviewer. The doctoral procedure in which the person is linked as a candidate is displayed as the own dissertation resp. habilitation. Therefore, pay attention to the way a person is linked to a dissertation or habilitation!

Future additions or changes need to be done directly in your data in CRIS. The information is automatically transferred to Imperia and in most cases also updated on the website (see below for details).



Image 7: Integrate projects and decide on their display options

Side note: Integrating courses (HIS-LSF)

In addition to content from CRIS, information on courses from the central course catalog (HIS-LSF) can also be integrated for individuals. To do this, select the "Courses" block. There is no connection between CRIS and HIS-LSF, so it is possible that the person selected at the beginning was not found directly in HIS-LSF. In this case the field "Name" remains empty and you have to search and select the person again separately with the help of the name. Once you have selected the person, you can group or restrict the course list in the same way as the content from CRIS using various characteristics.

Using the **Grouping** option, you can group the list of courses by semester as well as by course type. You can also combine both options. Furthermore, you can use the **Links option** to specify whether the title of the course should be displayed as a link and, if so, where the link should point to. You can also limit the list of events to a certain number of semesters to be displayed.

Please note that you need to manage / edit the details of your courses in HIS-LSF. You can find the HIS-LSF support [here](#).

Information from CRIS on a Project

Integrating project data from CRIS via the flex module is quite similar to the process for persons. Again, you look for the project title and select your project from the suggestion list. Please mind the exact spelling of the project title in order to find it here.

Choose the topic blocks you want to integrate. Again, some of these blocks come with their own option menus for defining how the information are displayed. Please make sure: When you want to show e.g. persons or publications for this project, these data entries have to be related to this project in CRIS.

Future additions or changes need to be done directly in your data in CRIS. The information is automatically transferred to Imperia and in most cases also updated on the website (see below for details).

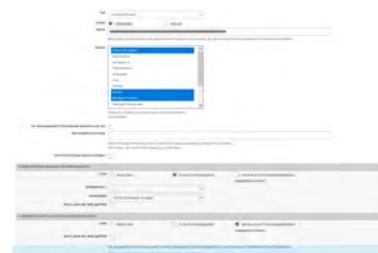


Image 8: Select the information for a project to be integrated

Information from CRIS on an organisation of the University of Münster

Information on organisation of the University of Münster from CRIS follows a different logic than information on persons or projects: While persons and projects exist directly in CRIS as separate entries and can also be edited directly here, data on institutions is "collected" via the **cards** connected to said organisation and then displayed en block via Imperia. When changes are made, it is not "the organisation" that is changed in CRIS, but e.g. the publication linked via a corresponding card. Often, these changes in CRIS - for example correcting a spelling mistake in a publication title - you either have to ask the publication's authors (related to the publication by their cards) or someone with **coordinating rights for this organisation** to correct the title.

Apart from the different logic in the data, the Imperia menus are again very similar to the ones for persons and projects: You look for the organisation's name (mind the spelling), select it from the suggestion list and choose which topic blocks are to be displayed. For each topic block you specify further details.

The difference is in the way how the data is collected:

- Under "Die Informationen beziehen sich auf" / "The information relates to", the affiliations through which content is "collected" are determined similar to a person:
 - "Personen in der/den ausgewählten Einrichtung(en)" / "Persons in the selected institution(s)": Only publications that are linked to exactly this institution are included here - in the example, only the publications that were published in Department 6.4. This can be important if you only want to display the publications from exactly this institute on the institute website
 - "Personen allgemein (= alle Visitenkarten)": All publications for all persons of this organisation are collected for all **cards** of these persons - no matter for which other organisations. In the example, Mr Herwig's complete publications from his time at the University of Münster -no matter if at the Institute of Information Systems or in Department 6.4 - are collected and displayed on the website for Department 6.4. This means that an organisation shows all publications of its members, regardless of the "place of origin"
- Select "Unter-Einrichtungen berücksichtigen" to include the data of hierarchically subordinate organisations to the one chosen above on the website
- You also define how Imperia should deal with the links to / data of persons affiliated with this organisation. The "Links" option asks which status of a person / card should be considered when linking data for display:
 - Consider all persons affiliated to this organisation, regardless of their status (e.g. active, left University of Münster). This way you can link all publications, projects etc. connected to your institute
 - Consider only active persons, currently working for this University of Münster organisation (which means that links to data of a person, who leaves the organisation, disappears from your website as soon as their card "ended")
 - Consider only inactive persons, whose card "ended" - for example for a website about a professor emeritus



Image 9: Select the information for an organisation to be integrated



Image 10: Filter on different project roles to be displayed

For projects of the organisation, you can also determine whether all projects of the institution or only projects with a specific project role (e.g. project manager, spokesperson) in the institution should be displayed - see image 10. Simply select the relevant role in the list. If you do not select a role, all projects of the organisation will be displayed. To delete the selection completely, click on the selected checkboxes and remove the selection. We recommend:

- For the filtered project list, e.g. for the speaker role, select the item "Personen in der/den ausgewählten Einrichtung(en)" / "Persons in the selected institution(s)" under "Die Informationen beziehen sich auf" / "The information relates to" and limit the display accordingly
- Integrate the flexmodule multiple times, e.g. if you want more than one filtered project list for different project roles or want as well a filtered as a complete project list

Please note that not all project roles in CRIS can be maintained by all persons. If there are any gaps or discrepancies, please contact cris@uni-muenster.de

Side note: Editing and publishing an Imperia page

If you edit existing Imperia pages, e.g. via the One Click Edit Toolbar, you may start in the Meta Edit step (see Figure 11). Here you can change the type of page (see the extension under "file name" / "Dateiname" - *.html indicates a static, *.shtml a dynamic Imperia page). If you want to overwrite the existing page, remember to tick the box "Overwrite an existing file" / "Eine evtl. bereits existierende Datei überschreiben". Now click on "Continue to Edit" / "Weiter zu Bearbeiten".

You can now integrate and define the flexmodule as described in this manual chapter.

When you define the CRIS flexmodule, the following Imperia functions are available at the top right of the screen (see Figure 12):

1. Speichern / Save: This saves the current settings as a draft. You can open this draft again and again via the Imperia desktop and edit it until it is published
2. Vorschau / Preview: This opens a new window that displays the current draft of your Imperia page. It allows you to check whether all CRIS settings meet your expectations
 - Please note that not all content appears in the preview - images are often not displayed, as are very complex filters, e.g. for the content of an institution
3. Weiter zu Fertigstellen / Continue to Finish: This starts the final process for publishing your Imperia page. Clicking on this button takes you to the next step, where you can check all the details again before you start the final step via "Publish now" / "Jetzt veröffentlichen"

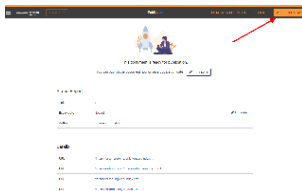


Image 11: Meta Edit for an existing page

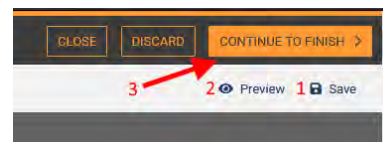


Image 12: Save and publish a page

i By republishing an Imperia page, you can of course publish new settings - but also transfer the latest CRIS data to your static Imperia page (ending in *.html).

i By republishing, you can also trigger the transfer of the latest CRIS data for dynamic pages (ending in *.shtml), which normally refresh CRIS data automatically. If, for example, a new, publicly visible publication is already visible in the [research portal](#) after two days but not on your Imperia page, republishing may help.

Note on automatic updating of web pages

Please note that the central web server allows two types of web pages - dynamic and static web pages. You specify the type of web page when you create it (see the Meta Edit step described in the side note "Editing and publishing an Imperia page" in this chapter).

- **Dynamic web pages** always end in *.shtml

Once the module is embedded in a dynamic web page, new entries from CRIS are automatically transferred to Imperia and updated on the web page. However, there may be delays of up to one hour until e.g. a new publication entry is also displayed on the corresponding web page. This is because in order to shorten the loading time of the web page, information are temporarily stored / cached for one hour. If the CRIS content is not available yet in this cache, there may be delays in displaying these new information. In addition, the content of your web page may not be available during e.g. server failures

- **Static web pages** always end in *.html

If the module is integrated into a static website, changes in CRIS are not automatically updated on the web page. For transferring the new information, the web page must be refreshed in its Imperia settings. This is especially necessary for websites that are not operated on the central web server (www.uni-muenster.de/). The advantage of static web pages is a very quick page loading and the permanent presentation of data during e.g. server failures. Moreover, institution-related data is also available in static mode

New or updates data in CRIS is published every 2 hours via an interface, where Imperia can fetch this data and transfer it to your websites. This process may take up to one day.

 When you can see changes or new data from CRIS in your [research portal](#) profile (which is automatically generated from your CRIS data), Imperia can also "see" and use this data.

Websites of FB04 and CRIS

Showing CRIS data on a website using the CMS of the FB04 /the School of Business and Economics

"Maintained once, used many times": CRIS aims to use information on persons, projects, publications etc. in multiple contexts. To do this, you manage your data in CRIS and CRIS offers this data via interfaces to other digital tools. One of these tool is [Imperia](#), the university's main Content-Management-System (CMS), with which almost all University of Münster websites are created, structured and edited. Some institutes like Geoinformatics or faculties like Business and Economics use their own CMS tools. The following instruction are for the CMS of the School of business and economics (also called FB04) usage only.

This FB04 CMS is based on a tool named Drupal and manages most of the faculty's websites and their content. It receives content from CRIS and other tools like the course / lecture platform LSF and the Learnweb. If you e.g. enter a new publication to CRIS, the CMS will gather it from CRIS and display it on your institute's website using its WWU Orga module (or "Orga" or "Orga Module" in the rest of the text).

For these instructions we assume that you know the basic steps in the FB04 CMS and are logged in to the role of a "**Site-Admin**" in the CMS. If you do not know what a "**Site-Admin**" is, who might be responsible for your institute's sites or need further information on the FB04 CMS, please contact the IVV2 Support support@wiwi.uni-muenster.de for FB04.

i Often persons with a [coordinating role](#) in CRIS to a business and economics institute often also have a "**Site-Admin**" role in the CMS for the websites of this institute. If you are not sure please contact either cris@uni-muenster.de or support@wiwi.uni-muenster.de depending on the system you need information on.

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Preparations in CRIS

The CMS of FB04 receives the data from CRIS at least once a day (usually at night) and enriches it with department-specific information from a separate database. Accordingly, some steps must be prepared in CRIS so that your content can be displayed correctly on your institution's websites. All CRIS users can do these steps either by themselves or e.g. ask a person with a [coordination role](#) to do it.

Visibility of persons and content

Your [personal profile](#) as a whole has a [status and a separate visibility](#) - same as other CRIS content as e.g. publications. When you log in to CRIS for the first time, your (by default active) personal profile will not be publicly visible because of data protection reasons. If you want to change this, you set the public visibility via the options available in the list view for People (normally, you can only see yourself [here](#)). If you allow public visibility, your profile is published in the [research portal](#) and your data is available to tools like the FB04 CMS, which manages data for your institute's website.

Therefore, please make sure in step 1 that your [CRIS profile is publicly visible](#) - either by changing the visibility yourself or asking someone with a [coordinating role](#) for your organisation.

FB04 staff categories

Your affiliation to internal organisational units of the School of business and economics (and the University in general) is also called your "card" in CRIS as it contains your contact details. You find your [cards](#) in the editing mask of your [profile](#) on the first tab "Key Information" at the bottom under "Affiliation to internal organizational units & Contact details". For the FB04 CMS you now need to prepare a FB04 specific field in your FB04 card:

For FB04 / School of business and economics please enter your organisational group into the text field "Organisation-related staff category (for FB04)" in your card. This field **MUST** contain correct information from the list below - otherwise you will simply not appear on your FB04 institute's website. Cards with an empty "Organisation-related staff category (for FB04)" field will be completely ignored, even when the person's profile is publicly visible.

Therefore please make sure in step 2 that the card to your FB04 affiliation contains your correct staff category.

The list of terms below are the "FB04 reference groups", which must be written in the text field exactly as in the table below (e.g. plural and in German). For the website, the FB04 CMS will add (gendered) singular and translations. If a different term is entered (e.g. "student assistant" instead of the required "Studentische Mitarbeiter"), it will be displayed as a separate group, but it will lack translations and some other options.



Organisation-related staff category (for FB04)

Click + to open the table

Professoren
Emeriti
Außerplanmäßige Professoren
Vertretungsprofessoren
Honorarprofessoren
Gastprofessoren
Juniorprofessoren
Seniorprofessoren
Privatdozenten
Sekretariat
PostDoc
Akademische Direktoren
Akademische Oberräte
Akademische Räte
Wissenschaftliche Mitarbeiter
Mitarbeiter
Externe Doktoranden
Assoziierte Doktoranden
Lehrbeauftragte
Wissenschaftliche Hilfskräfte
Studentische Hilfskräfte mit Bachelorabschluss
Studentische Hilfskräfte
Studentische Mitarbeiter
Ehemalige Mitarbeiter
Ehemalige Studentische Hilfskräfte
Ehemalige Angestellte
Gastwissenschaftler
Systemadministration
Bibliothek
Alumni

You can manage this text field (and other contact details) in your [card](#) in your [personal CRIS profile](#). You find your [cards](#) in the editing mask of your profile on the first tab "Key Information" at the bottom under "Affiliation to internal organizational units & Contact details".

After clicking the pencil icon next to a card, a new layer with the card's editing mask will open. The text field "Organisation-related staff category (for FB04)" is at the bottom of the card's editing mask. Enter your staff category. Next manage your other contact details and click on "Done" when finished. A status windows will appear where you confirm the card status and then return to the profile's mask. (Quick) Save your personal profile (violet buttons at the bottom of the profile's editing mask)

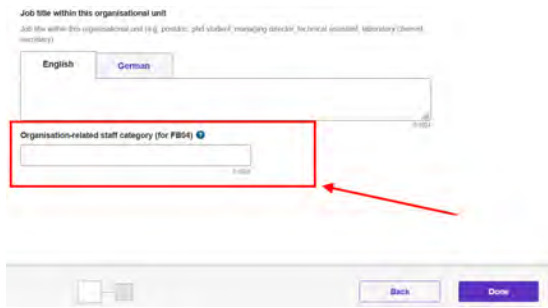


Image 1: Text field Organisation-related staff category (for FB04)"

It normally takes until the next day for your personal data to be visible on your FB04's website - given that the "**Site-Admin**" for the CMS of the FB04 prepared your website accordingly.

Potential pitfalls

- When you do not appear on your institute's website, please check if the staff category text field in the card for this institute contains a correct staff category - normally it is in the card you use for your contact details
- If you worked for different FB04 institutes during your time at the University Münster, please make sure that only the most recent card contains your staff category. Otherwise your profile will appear on multiple FB04 websites
- When showing a person's profile on a FB04 website, the organisation's name sometimes does not fit the one you see on your card in CRIS - but e.g. to the institute above your organisation. This is a speciality of the FB04 which makes sure that all profiles for an institute show the same organisational name. This is done by a background process of the FB04 CMS, not by CRIS
- ⚠ If you are / were not only active in FB04 or are linked via non-FB04-card, e.g. as an author to a publications, and would like these works to also appear on your FB04 page, then you need to relate your (active) FB04 card to e.g. the publication. Otherwise, the FB04 CMS will not be able to display these works

If you need more information or have a question, please contact either cris@uni-muenster.de or support@wiwi.uni-muenster.de depending on the system you need information on.

Displaying CRIS data on a website using the Orga module

In the CMS of FB04, information is not integrated on the basis of individual persons, but on the level of an organisation (or the institutions below it). For this purpose, data is "collected" on e.g. persons, projects and publications, who are related to this organisation via their [CRIS card](#). Correspondingly, editing a profile is in the CMS of FB04 done via the WWU Orga module (or "Orga" or "Orga Module" in the rest of the text). Here, various options can be activated and adjusted.

After logging in to the FB04 CMS as a "**Site-Admin**" you see a black bar in to top of the page offering different options. Here you click on "WWU Orga" ("Orga" in the rest of the text) and further options appear. For basic administration check the following points:

- **Organization:** Here you choose the (Main) Orga Unit you want to manage websites for. If this Orga Unit includes further Orga Units then all Orga Units in this hierarchy are listed below in a table (see Image 2). If you want to include information from some of these listed Orga Units, please check the option "Use multiple orga units for this site". Also check "Include" in the table below for all Orga Units which data should be on the websites. Please do not forget to save your settings
- **Menu:** By clicking on "Menu" you see a possible website structure with possible sites and site menu options. You can define names for the site menu options (e.g. "Personen" as Menu link title in the Main menu in image 3) and where they should be located in the website structure, see Image 3. You can manage the following settings either for an existing (click on "Edit") or new link in the website structure. Please do not forget to save your settings
 - Menu link title
 - Language
 - Parent item
 - Content type for this specific site (see below for more details)
 - URL Alias (e.g. the "**team**" <https://www.wiwi.uni-muenster.de/fcm/de/das-fcm/team> at the end of this link)

After defining the organisation and the structure of their website(s), the CMS automatically gathers all information available to this organisation in CRIS. The website is generated at once and ready to use. You can nevertheless work on some details.

If you need more information or have a question, please contact support@wiwi.uni-muenster.de.

Displaying different types of content

For data from CRIS the FB04 CMS manages three types of content:



Image 2: Selecting the (Main) Orga Unit

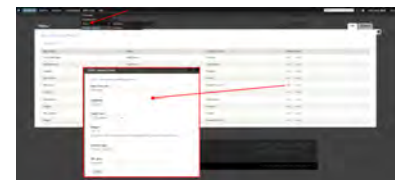


Image 3: Integrating different Information on an institute's website

- People (Cards)
- Projects
- Publications

"Courses" as fourth content type of the FB04 CMS receive their information from the platforms LSF and Learnweb and will be not included in this manual.

The content is compiled for the organisation (and its sub-organisations) which you selected in the Orga module under "Organization". People, publications and projects from CRIS are then "collected" and prepared following the [cards connecting the data to the organisation](#). The type of content to be displayed on a page is set in the Orga module under the option "Menu", see Image 3.

All changes here in the FB04 CMS are done by the responsible "**Site-Admin**" for this organisation.

How each of these content types is displayed on a site is predefined by the system. You can adjust details in the "Display settings" options, see Image 4.

All changes you make here then apply to all pages of the organisation for which you are currently managing settings. For example, you do not change the settings for a single person profile, but for all person profiles of the institute.



Image 4: Options for different types of information under "Display settings"

People (Cards)

For persons the FB04 CMS offers two forms or presentation:

Profile cards

Profile cards show the photo and contact details of the persons belonging to the institution one card below the other - see a card as an example in Image 5. Both photo and contact details come from the [CRI S person profile](#) and the [corresponding card](#). Clicking on the person's name takes you to the person's profile page.



Image 5: Profile cards for persons

The settings for this are in the Orga module under "Display settings" and then "People (Cards)".

Here you define whether the persons are to be displayed in groups. The grouping follows the Organisation-related staff category entered in the corresponding text field in the CRIS card of a person's profile (see above). You can also see if persons did not follow the reference groups listed above - the deviating groups are nevertheless listed here (e.g. "Student assistant" instead of "Studentische Mitarbeiter").



Image 6: Options for Cards

If no grouping is necessary, just choose "Select" in the "Group by" drop down menu. If you want to define a grouping, choose "Organisation-related staff category". Now you will see further options, see Image 6:

- Sorting of the groups:
 - The system offers a (recommended) default group sort order. Just check this option below the "Group by" drop down. Now the system will apply a "best practice" sorting used by most FB04 pages
 - Without this option, you as the "**Site-Admin**" can actively sort the groups in the table. Just click on the cross symbol in front of a row and drag this group to the position you want to see it in
- Further display settings for each group are (de-)activated by (un-)checking the option in the respective column:
 - **Collapsed**: Checking this option will "collapse" this group when the page is visited. The profile card list is visually shortened by this. "Uncollapsing" a group will show the cards of all members of this group
 - **Hidden**: Checking this option will hide this group and members of the group. In Image 6 this would e.g. hide all "Guest Researcher"
 - **Without contact details**: Checking this option will show the cards with names and photos of this group's members but without their contact details from CRIS. In Image 6 this option is set for all former colleagues

Please remember to "save" your settings.

Profile page of a person

When you click on the name of a person in their profile card, you will be forwarded to the profile page of this person. Here you see most information CRIS has for this person (plus information on "Courses" from other data sources).

The information in the upper part of the profile page as well as the photo are from the person's [CRI S profile and the related card to the organisation](#).

The information on the others tabs are found in different CRIS rubrics:

- **About**: Contains CV information from the [CRI S profile](#)
- **Publications**: Contains [publications](#) from the person, which are listed as publicly visible in CRIS
 - Further options for publications in a person profile can be found unter Orga » Display settings » Publications under "Profile"
 - You can choose to group publication based on [publication type](#) and / or publication year

- You can choose to offer a link redirecting to the publication's details page in the [research h portal](#). If the redirect option is not checked, the system will generate a detail page for the publication on the organisation's website
- **Projects:** Contains (publicly visible) [projects](#) for which the person is listed as a project team member in CRIS
 - Further options for projects in a person profile can be found under Orga » Display settings » Projects under "Profile"
 - You can choose to group projects based on project status
 - You can choose to offer a link redirecting to the project's details page in the [research portal](#). If the redirect option is not checked, the system will generate a detail page for the project on the organisation's website
- **Awards:** Contains all (publicly visible) [distinctions, honours or awards](#) received by this person, which are listed in CRIS
- **Courses:** Information from LSF and Learnweb on courses and lectures this person is offering. Options for this can be found in Orga » Display settings » Courses

All changes you make here then apply to all profile pages of the organisation. You do not change the settings for a single person profile, but for all person profiles of the institute.

Of course you can use the link to a person's profile page for different purposes, e.g. in their email signature or on other websites.

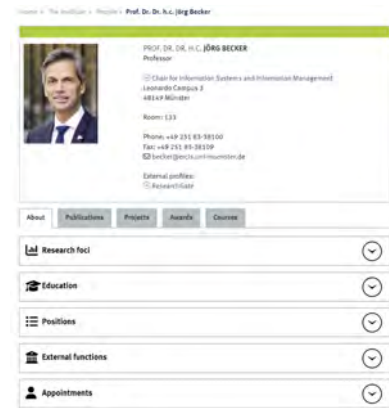


Image 7: Profile page of a person



Image 8: Person profile options for publications and projects

Projects

On the organisation's project site, all [projects](#) are presented with their main information - based on persons from this organisation related in CRIS to this project as team members.

In the example on image 9, this organisation's project page is located under "Research" (see the "Menu" settings you defined for this website and its structure).

Settings for the organisation's project page can be managed under Orga » Display settings » Projects under "Overview" (see Image 10):

- Here you can define whether projects should be grouped based on their project status or not grouped at all. Main project status are "Definitely finished" and "In progress"



- The option "Display" determines whether all status groups should be expanded when the page is opened or just e.g one status group
- You can also set if a click on the project title should redirect you to the project's details page in the [research portal](#) or just show further details (based on CRIS data) on the website

Please remember to "save" the settings.

Image 9: Projects of an organisation

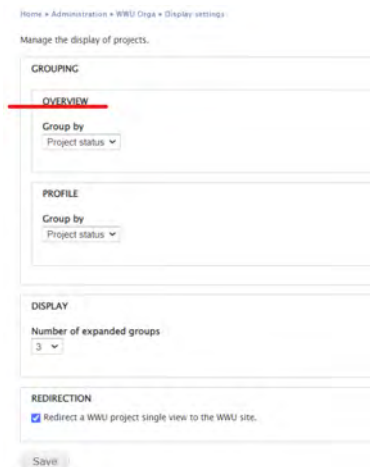
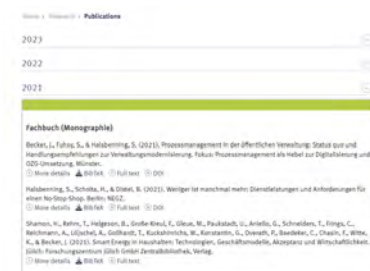


Image 10: Options for the projects of an organisation



Publications

On the organisation's publication site, all [publications](#) are listed with their main information - based on the members of this organisation related to publications in CRIS as an author / editor.

In the example on image 11, this organisation's publication page is located under "Research" (see the "Menu" settings you defined for this website and its structure).

The individual publications automatically follow the APA citation style.

If publication links are available for "full text" and / or "DOI" in the CRIS data for a publication, these links are also presented here. If no full text / DOI links are entered to CRIS for a publication, then there will be no additional links for this publication in the organisation's publication list.

For each publication, the website offers the option of downloading the information in BibTeX format (for e. g. importing it into Citavi).

Settings for the organisation's publication page can be managed under Orga » Display settings » Publications" under "Overview" (see image 12):

- Here you can define whether publications should be grouped based on their publication type and / or publication year
 - One of these groups is the main group (in the example in image 11 publication year)
 - The other is the subgroup (here the publication type), only visible if the main group is expanded
- The option "Display" determines whether all main groups should be expanded when the page is opened or e.g. just one like the latest publication year
- You can also decide if a link is offered redirecting to the publication's details page in the research portal. If the redirect option is not checked, the system will generate a detail page for the publication on the organisation's website, based on information from CRIS

Please remember to "save" the settings.

Image 11: Publications of an organisation

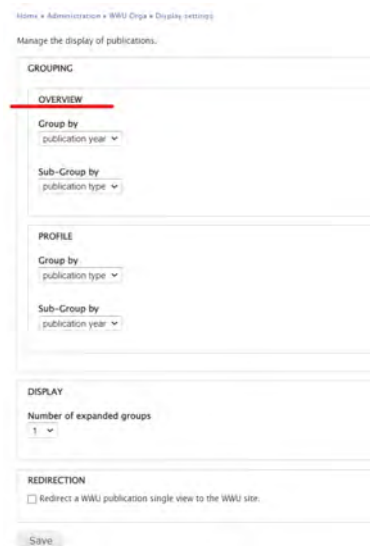


Image 12: Options for the publications of an organisation

Note on automatic updates of websites

The CMS of FB04 receives the data from CRIS at least once a day (usually at night) and enriches it with department-specific information from a separate database. Please note that updating new or changed content of a website can usually take a day.

CRIS FAQ

Most problems with CRIS can be solved quickly by using the information on this page or the rest of this manual. If you have a question or a specific problem that is not in here, please contact us at cris@uni-muenster.de.

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CRIS Basics

What is CRIS?

CRIS is the current research information system of the University of Münster. It gathers information on research activities and results of the University of Münster in a single information base. Following the principle "maintained once, used many times", CRIS serves both as a tool for communicating research activities to the outside world as for handling all reporting requirements internally and externally. Time-consuming multiple data collections should be avoided as far as possible. The scientists themselves should check, complete and continuously update the contents of CRIS. This way, they are enabled to fulfil [internal reporting](#) obligations.

Which data is stored in CRIS?

Scientists' personal data is imported automatically to CRIS. Details on externally funded projects are added by the CRIS team. Other data like scientists' publications and their CVs are added by the scientists themselves.

Who has access to the information stored in the system?

Almost every person working at the University of Münster (and most FB05 persons working at the UKM) has an automatically generated CRIS account. Different user roles and different types of visibility define who has access to the data:

- Every scientist can view and edit the data belonging to them (e.g. via relation to their [cards](#)), at least for most [status](#). They can view their basic personal data - for which changes are automatically done by the personnel systems
- Information visible within CRIS can be searched and viewed by person with a CRIS account. The scientists can control internal [visibility](#) for most of their data
- Information visible to the public are accessible for everyone in the research portal or on other websites of the university. The scientists can control public [visibility](#) for most of their data

How does my data get into the system?

Depends on the type of data:

- Publication data can be entered [manually](#) or imported from an [online source](#) or [file](#) by the scientist
- CV data and scientific output like talks can be entered manually by the scientist
- Details on externally funded projects are added by the CRIS team
- Scientists' personal data is imported automatically to CRIS

Where is the data stored and is it safe?

All data is stored on a University of Münster's own servers. Data can only be edited by automatic procedures (like importing personal data from personnel system), the CRIS team, each scientist (only their own data) and persons with broader CRIS roles like [organisational coordination](#) (based on role-specific rights and rules). All changes are documented in log files.

Log in and edit content

How can I view and edit my content?

You can log in to the system with your Uni / University ID and Uni / University password. You can find further details [here](#).

What do I do if my employees or I are not listed in CRIS?

Send an e-mail to cris@uni-muenster.de. We will investigate the reason for this and inform you on the next steps.

What data can I upload myself from existing files?

You can import publication data using formats like BibTeX. For further details, see [here](#).

How can content from CRIS be integrated into our own websites?

CRIS offers its data via interfaces to other digital tools. One of these tools is Imperia, the University of Münster's main Content-Management-System (CMS), with which almost all University of Münster websites are created, structured and edited. Some institutes like Geoinformatics or departments like Business and Economics use their own CMS tools. You can find details on working with [Imperia](#) and the [FB04 CMS](#) tool in this manual.

Further details on the CRIS interface can be found in the [technical documentation](#) (in German).

My entry was accidentally deleted. Can the data be restored?

Please contact cris@uni-muenster.de. The CRIS team can restore archived data up to 4 weeks.

My data is incorrect. What can I do?

You can correct mistakes in your CV or most entries like publications yourself. Depending on the status, other entries can be corrected by the CRIS team - as well as e.g. the title of externally funded projects, which are prepared by the CRIS team. Other data like your name or the name of your institute can only be corrected by university's administration and will then be automatically corrected in CRIS. If you are unsure, just send an email to cris@uni-muenster.de.

Is it possible to delegate editing my data to someone else?

Yes, you can delegate the editing rights to another person with an active CRIS account. This function is called "[User delegation](#)" and available in your [CRIS settings](#).

Is it possible to have one person manage all our institute's CRIS data?

Yes, there is a special user role for coordinating an organisation's CRIS data. Coordination rights are managed by the CRIS team. Granting someone coordination rights has to be authorised by one of the leaders of said organisation.

To request granting coordination rights for your University of Münster / UKM organisation, please write an email to cris@uni-muenster.de including the following information:

- the name of the University of Münster / UKM organisation you are leading,
- the full name of the person you want to grant coordination rights to,
- this person's Uni / University ID (of course not the password).

You can find further details [here](#) - and information on a coordinating role for joint projects [here](#).

Is it possible to export CRIS data?

You can "export" your data to websites via CMS tools like [Imperia](#) or the [FB04 tool](#). In addition you can export your data to Excel - further details on this can be found [here](#). Other export options are being developed.

Troubleshooting

I am assigned to the "wrong" university organisation, how can I change this?

Your [internal affiliation to the University of Münster is represented by your card](#) and created automatically based on information CRIS receives from other systems. It may happen that the card does not represent your current position / internal affiliation. In some of these cases the CRIS team can be of help, in other cases you need to contact your HR person.

Cases in which the CRIS team can assist you:

- You see all your cards in the editing mask of your personal profile, but your most current one is not visible in the research portal
- The chronological order of the cards is not correct (the CRIS team might check the system sorting)

Cases in which you may need to contact HR management:

- You changed positions within University of Münster. It takes some time until all system are updated concerning your new position - latest when you start your new duties
- You are affiliated to the "wrong" University of Münster organisation. Here we will ask you what your contract says (if necessary together with HR) - e.g. you are working in team Mustermensch, but your contract is issued to the Institute of Applied Physics. In this case CRIS will receive a card for the institute
- Your student assistant is not affiliated to your group, but to a colleague's. Again, here you need to check (if necessary together with HR) what is written in the assistant's contract

Best write us an email to cris@uni-muenster.de describing your case. We will check your request and advise you which administration office might have to be contacted. Please include the following information:

- Name and Uni / University ID of the person concerned
- Name of the University / UKM organisation concerned
- Start / end of the position

It is not possible for me to log in to CRIS. What can I do?

Please send an email to cris@uni-muenster.de and describe the situation (incl. your Uni / University ID and the position you are working in). We will check where the problem is and either find a solution or discuss further steps with you.

All publications and projects have been entered, but still do not appear on my website

Please check first if all your entries have "[Visibility to public = visible](#)". Only content with this setting will be displayed on your website.

In addition, you can check in e.g. [Imperia](#) how the setting for collecting data from different cards of a person is: Publications, projects, awards, doctorates and habilitations are not directly linked to a person in CRIS, but to their [cards \(a person's affiliation to an institution\)](#). Imperia uses these cards to collect data to display. The option "Die anzuzeigenden Informationen beziehen sich auf" (= The information to be displayed relates to...) is used to collect whether only the content associated with the selected card or all information associated with all cards of the person.

If you are unsure, just send an email to cris@uni-muenster.de

Some CRIS terms

Card: Your internal affiliation is represented by your card and of central importance in CRIS. It is used to relate your personal profile to the University of Münster (UM) / Münster University Hospital (UKM) organisations you work at. Each card shows your affiliation to one certain UM / UKM organisational unit or institute (and is generated based on contract data received from personnel systems). If you work in different UM / UKM organisations, you will have multiple cards, each representing one specific affiliation. This card is then used to relate all your content such as publications, projects or received awards to your personal profile and to the institution you are affiliated with. This way all your content is not only connected to you, but also to the organisation in which context it was created.

CONVERIS: Technical platform / software with which the research information system of the University Münster is realised

CRIS: Acronym for "Current Research Information System", the international name for Forschungsinformationssystem (FIS)

CRIS.NRW is a cooperation project recommended by the Digital University NRW and is funded by the digitisation offensive of the Ministry of Culture and Science of North Rhine-Westphalia. The state initiative is based at the University of Münster and draws on the experience already gained there in the introduction of research information systems and as a pilot university in the specification of the KDSF (short for [Kerndatensatz Forschung](#)) .

CRIS (formerly known as CRIS.WWU): Abbreviation for the research information system of the University Münster. The abbreviation is based on the internationally used acronym "CRIS"

DOI (Digital Object Identifier): A DOI name is a digital identifier of an object - physical, digital, or abstract. DOIs solve a common problem: keeping track of things. Things can be matter, material, content, or activities. Designed to be used by humans as well as machines, DOIs identify objects persistently. They allow things to be uniquely identified and accessed reliably. You know what you have, where it is, and others can track it, too. You can find more details on <https://www.doi.org/>

Duplicate: It may happen that an entry exists more than once in CRIS - e.g. because two authors have each created an entry for a joint publication or because an already existing publication is imported again. Or you create a project as an own resource project because you were not aware that an entry already exists for an externally funded project. Such a double entry is referred to by the system as a duplicate. Information on how to manage duplicates can be found [here](#)

euroCRIS: European Organisation for International Research Information (euroCRIS), which, among other things, maintain and develop an international standard for research information on behalf of the EU. Find more details under <http://www.eurocris.org/>

Forschungsportal / Research Portal: The University Münster's research portal <https://cris.uni-muenster.de/portal/en> shows the overall university research profile with the corresponding research activities. All publicly visible publications, projects and other research activities recorded in CRIS are automatically published here

ISSN (International Standard Serial Number): An ISSN is an 8-digit code used to identify newspapers, journals, magazines and periodicals of all kinds and on all media—print and electronic. Depending on the type of publication, there are three ISSN types: pISSN / print ISSN for printed works, eISSN / electronic ISSN for digitally published works and ISSN-L / linking ISSN as a higher-level ISSN for series that are published both in print and digitally. Further information as well as a search for journals' ISSNs can be found here <https://www.issn.org/>

KDSF (Standard for research information in Germany): The KDSF (short for [Kerndatensatz Forschung](#)) is a standard for research information in Germany. It is a voluntary set of rules for the harmonisation and standardisation of research reporting at universities and scientific institutions and was recommended for introduction in the German science system by the German Council of Science and Humanities in January 2016

ORCID (Open Researcher and Contributor ID): ORCID is a global, not-for-profit organisation, see <https://orcid.org/>. ORCID's vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions across disciplines, borders, and time by the ORCID iD: a unique, persistent identifier for researchers

Person: The term "person" can be found in CRIS with different meanings

- as a person: Any person with an account in CRIS - i.e. yourself. This account / [personal profile](#) links your organisational information (your [internal affiliation / card](#)) and content (e.g. publications).
- as a role: the editing rights to your content, which you can [delegate to another person](#) in CRIS

Role: A role contains a collection of rights, e.g. what someone is allowed to see and edit. These roles are assigned to persons who can use them to perform various tasks in CRIS. A person can have several roles (e.g. for their own content, for the content of a second person and the CRIS coordination for an institute). It is possible to switch back and forth between these roles. Examples of CRIS roles are:

- Person role: The editing rights to one's own content. This role can be transferred to another person in CRIS via the "[user delegation](#)"
- Coordinating role: This allows editing of content on a higher organisational level - especially for [organisations of the University](#) or [joint projects](#). This role cannot be delegated to other persons

Status: Each entry passes through different statuses during editing, which fulfil different tasks. In list views, for example, you can [filter on the status](#) and thus manage your entries. The status is to be set actively each time when editing an entry. Which statuses are available depends on the rubric, user rights and previous status of the entry

Validation by the ULB: Starting in the near future, ULB staff will control all formal criteria of a valid publication and check e.g. if there are duplicates of this entry in the system. The validation does not change the visibility of the record for e.g. the [research portal](#). Its main purpose is assuring a high quality of all entries

Visibility: The visibility of an entry affects two different levels:

- **Visibility to the public:** The entry is visible in the [research portal](#) and therefore on the internet to the public. Also other tools like the CMS tool Imperia can fetch the data from the CRIS interface and display the data on other University of Münster websites like an institute's homepage
- **CRIS-internal visibility:** The record is "findable" within CRIS - for the [global search](#) as well as in menus for relating one item to another. This way you can e.g. relate a colleague's publication to a project you both work on

Keyboard shortcuts in CRIS

CRIS supports the usage of access keys for an easy access to special parts of the page. To use these access keys a special key combination is used, which is depending on the browser used:

- **Chrome:** Use the ALT key followed by the access key to focus on the target element. If the target element can be activated or clicked this will be done automatically.
- **Firefox:** Use the ALT + SHIFT key followed by the access key to focus on the target element. If the target element can be activated or clicked this will be done automatically.
- For other browsers please refer to the manual of this browser to find how access keys can be used.

The following access keys can be used on all pages (for simplification only the format for Chrome is shown, modified the key sequence as needed):

- ALT + 0: Opens the dashboard.
- ALT + 1: Jumps to the navigation.
- ALT + 2: Jumps to the content section.
- ALT + 3: Jumps to the header.
- ALT + 4: Jumps to the breadcrumb section (control pane).
- ALT + 5: Jumps to the search.

On the edit pages an additional access key can be used:

- ALT + 6: Jumps to the floating footer for a fast access to the footer buttons.

Special keyboard commands

For some pages or page elements special keyboard commands can be used for an easy usage of these elements.

List Page

On the list page the following keyboard commands can be used.

- SHIFT + ARROW UP: Moves to the previous entry in the result list. Moves to the last entry if pressed on the first entry.
- SHIFT + ARROW DOWN: Moves to the next entry in the result list. Moves to the first entry if pressed on the last entry.
- SHIFT + PAGE UP: Moves a whole page back in the result list. Does nothing, when on first page.
- SHIFT + PAGE DOWN: Moves a whole page forward in the result list. Does nothing, when on last page.
- SHIFT + HOME: Moves to the first result page. Does nothing on the first page.
- SHIFT + END: Moves to the last result page. Does nothing on the last page.

Date picker

To open the date picker press ENTER when the date input field has the focus. While the date picker is open, the following keyboard commands are available:

- PAGE UP: Move to the previous month.
- PAGE DOWN: Move to the next month.
- CTRL + SHIFT + PAGE UP: Move to the previous year.
- CTRL + SHIFT + PAGE DOWN: Move to the next year.
- CTRL + HOME: Move to the current month. Open the date picker if closed.
- CTRL + LEFT: Move to the previous day.
- CTRL + RIGHT: Move to the next day.
- CTR + LUP: Move to the previous week.
- CTRL + DOWN: Move the next week.
- ENTER: Select the focused date.
- CTRL + END: Close the date picker and erase the date.
- ESCAPE: Close the date picker without selection.