

Exploring the boundaries of CRIS systems

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In a joint euroCRIS/EARMA session held in Feb 2021, the Research Information Management (RIM) community explored to what extent there was a dichotomy between the RIM and the RMA domains (Research Management and Administration). The conclusion of the session was that there was no such dichotomy but that these were complementary areas that could benefit from shared research information management workflows. In fact, CRIS systems are increasingly serving the whole project lifecycle from the process for putting together a project proposal to the collection of the references for the latest projects outputs and the assessment of its research impact. These systems usually have a modular architecture where some modules – usually those dealing with Open Science – are openly available while others remain closed and for internal use-only at institutions.

The gradual adoption of various persistent identifiers (PIDs) provides a case in point for the sort of metadata-sharing workflows across modules, regardless of whether these are open or closed ones. ORCIDs for researchers involved in a project proposal (and RORs or Ringgold IDs for their institutions) will be available very early in the project lifecycle, but will be reused along the whole project, including on its various outputs. The rationale for the emerging Research Activity IDs (RAiDs) is actually this PID reusability: if a project proposal is awarded funding, the project will eventually be given a DOI-based grantID by the research funder, which will in turn be included in the RAiD and reused from then on.

This is all very well from a RIM perspective, but the question these workflows covering the whole project lifecycle raise is whether or not CRIS systems can be considered to have boundaries. For instance: if an institution is operating just one of such "RMA modules", say a post-award module, and this is run in a closed mode, i.e. not visible from the outside or even referenced on the institutional website on research, can this be considered to be a CRIS if there is no openly available research portal associated with it or any trace of it on any institutional webpage?

We should clearly try to avoid confusing what a CRIS is with what sort of systems can easily be recorded in the euroCRIS DRIS directory. However, if euroCRIS is expected to provide an overview of the CRIS landscape as part of its mission, it's important to find a way for these 'internal' systems to be tracked given that questions are occasionally arriving from euroCRIS members on possible software solutions for their needs. Moreover, the examples for such 'internal' systems keep growing - we currently have the likes of *Worktribe* in the UK, *Fundanet* in Spain, (Switzerland-based) *MatchingNeeds* in the German-speaking world and *Vidatum* in Ireland.

Case studies could provide a good way to deal with the 'visibilisation' of these 'hidden' systems from a euroCRIS perspective, but this would need to be agreed with both the RIM community and the vendors. Some vendors -- the most dynamic and successful ones -- are already providing some of these case studies, but this is more the exception than the rule at the moment.

The crux of the discussion is however to try and define what a CRIS is and what it's not. If these project management systems pose a challenge to the definition of CRIS, at the other end of the spectrum we have sheer research portals like VIVO, Dialnet CRIS and others who mainly deal with the 'visibilisation' of the institutional research and include little research information management (meaning for instance clear links between projects and research outputs) and very rarely CERIF-based interoperability. Are these research platforms CRIS systems?

The discussion on whether VIVO is or is not a CRIS is a long-standing argument regularly revisited by the euroCRIS Board via lengthy email exchanges. Quite a few years ago an attempt was made to clarify what a CRIS is by the CERIF Task Group (led back then by Keith Jeffery and Brigitte Joerg) by stating that a CRIS is "an information system that -- when mapped to CERIF -- populates at least three of the following five entities: Person, OrgUnit, Project, Publication, Funding". The time is surely ripe to try and update this definition in the light of all the previous reflections?