

CRIS Tender 2026

Appendix 2. User Stories

Definition of concepts and roles used in this document

Concept	Definition
Outputs	Publications, activities, prizes, press/media coverage, datasets, software, artefacts and other resulting works that have been created by TU Delft staff.
Contributor	Contributors to outputs, i.e. authors, editors, supervisors, creators, inventors, etc.
System	The research output administration software system offered by the vendor (CRIS) when implemented, including additional showcasing functionality and intended integrations with other systems.
System Owner	Staff member responsible for policy and decision making about (future) use of the system.
System Admin	User with fullest access to the system's content, functionality and technical setting as designed by the developer. Responsible for effective and efficient configuration and user management.
Library Specialist	User based at the university library with tasks and responsibilities to register TU Delft's research outputs as complete and accurate as possible. Library Specialists typically do the work for one or more faculties.
Faculty Information Coordinator (FIC)	User based at a TU Delft faculty responsible for reporting at a faculty, faculty department or research group level.
Researcher	Scientific staff in one of TU Delft's faculties; including Postdocs and PhD students.
Portal	The web-based public facing interface belonging to the system allowing the public to see, browse, search and download the part of the stored content that has been labelled as 'public'.

Functionality: User Stories

No.	User Story
U.1	As a <i>System Owner</i> , I want to be able to use additional (sub)content types such as software, prizes and grants, facilities/equipment, collaborations or case studies, including custom (sub)content types, so that the system can support both current and future organisational needs. For these (sub)content types, I want to be able to define which fields are mandatory.
U.2	As a <i>System Owner</i> , I want to decide which (proprietary) identifiers are used in the system, such as ORCID, Scopus and/or Dimensions ID, so that I can rely on consistent and correct data regarding authors/contributors.
U.3	As a <i>System Owner</i> , I want the system to provide a flexible and comprehensive API, so I can effectively and efficiently implement the necessary integrations with the HR-system (AFAS), the institutional repository and other systems as specified in paragraph 2.3.
U.4	As a <i>System Admin</i> , I want to be able to add custom labels, keywords or classifications to records, so that I can use these labels to select sets for reports or dashboards. As an example: we use the label "Taverne" to mark publications that are made openly available in our Repository under this provision of the Dutch copyright law. We would like to be able to report on all publications marked "Taverne". I want to be able to use these additional labels, keywords or classifications also through selections when using the API.
U.5	As a <i>System Admin</i> , I want the system to validate fields during input whenever specific formatting or logic is required, so that incorrectly formatted input is rejected. As an example: date fields should have the correct formatting based on EU date format, not allowing variations or mixed use of markers such as dashes, slashes or spaces and an end date cannot appear before the corresponding start date.
U.6	As a <i>System Admin</i> , I want to be able to access and analyse log files in case unexpected or severe (human) errors occur, so that I can understand what has gone wrong and what might be done to reverse the error.
U.7	As a <i>System Admin</i> , I want to define roles to determine which information users can access, create, edit and delete, and limit their scope by organisational unit, content type and workflow status, so that each user can only work with the content that fits their responsibilities. As an example, not all users with a reporting role have the rights to access all the information in the CRIS, as it might be necessary to limit this by their organisation unit.
U.8	As a <i>System Admin</i> , I want to be able to configure the system so that researchers can have multiple and simultaneous employments, so that the information from the HR system is interpreted correctly into the CRIS.
U.9	As a <i>System Admin</i> , I want the reporting role to be configurable, so that not all reporters have the same access rights.
U.10	As a <i>System Admin</i> , I want to be able to configure the system so that information which is not yet "verified" as well as information marked as confidential can be excluded from the public portal, so that I can keep confidentiality when needed.
U.11	As a <i>System Admin</i> , I want to be able to test new portal functionality in a sandbox environment, so that I can implement change management in a way that is required by my organisation's IT department.
U.12	As a <i>System Admin</i> I want to restore previously rejected content so that content that was rejected in error or is now considered valid can be reinstated without requiring it to be submitted again.

U.13	As a <i>Library Specialist</i> , when manually adding a record for a publication, I want to be able to (also) select from a list of known authors/contributors from which I can choose, so that I may not unintentionally or unnecessarily create new authors/contributors.
U.14	As a <i>Library Specialist</i> , after logging into the system, I want to see or to fast-click to a list of all newly imported, duplicate or updated records that have an affiliation to my assigned faculty, so that I can quickly and efficiently start my daily task of evaluating, editing and verifying these records in the CRIS. I want to be able to easily manage and generate insight into existing work queues without using reporting tools.
U.15	As a <i>Library Specialist</i> , I want the system to present me an overview of only the new (or updated) records from the faculty or research group assigned to me from a saved, predetermined selection of filters, so I do not have to create this selection manually at every session.
U.16	As a <i>Library Specialist</i> , I want the system to present me with a list of possible matches for contributors, where I can also see the affiliation for known contributors, so I can add the correct contributors to a record, even if different people with the same initials and last name exist in my organisation.
U.17	As a <i>Library Specialist</i> , when manually adding a record for a publication, I want to be able to (also) select from a list of known journals and publishers, so that I may not unintentionally or unnecessarily create new entries in the system.
U.18	As a <i>Library Specialist</i> , I want the system to provide me with enough metadata to decide whether to merge similar records, so that duplicate records can be merged without the risk of data loss.
U.19	As a <i>Library Specialist</i> , I want to be able to search for records with missing data, such as publications without a journal title, so I can make records as complete as possible.
U.20	As <i>Library Specialist</i> , I want to get notified of possible record updates by the automatic harvester, so I can decide whether or not to accept the updates
U.21	As a <i>Library Specialist</i> , I want to be able to set a preferred source when opting for more than one external source for metadata import/harvest, so that I do not have to evaluate more duplicate records than necessary.
U.22	As a <i>Library Specialist</i> , I want to be able to approve or reject updates to already “verified” records from external sources, so I can effectively manage these updates without unnecessary duplicating records or unnecessary (re-)validation steps.
U.23	As a <i>Library Specialist</i> , I want the system to remember which suggested changes I have previously rejected, so I don’t have to do the same evaluation twice.
U.24	At TU Delft, we need to be specific about three (3) levels in the organisational hierarchy: faculty, (faculty) department, and research group. As a <i>Library Specialist</i>, I need to select the right level of organisational unit as an affiliation to the record for the (sub) content type, so that faculties, faculty departments and research groups are correctly identified in reports. As an example: the record of a publication published by a TU Delft author affiliated with the faculty of Mechanical Engineering should be entered as affiliated with the research group to which the author was affiliated at the time of publication, where the research group is logically connected to the right department in the faculty of Mechanical Engineering.
U.25	As a <i>Library specialist</i> , I want to review and correct the effects of changes delivered by the HR system on the organisational hierarchy and on person affiliations, such as merged or split units and researchers moving between units, so that affiliation data stays accurate and free of duplicates. I also want changes in a person’s employment to leave the attribution of already registered content unchanged, so that historical records and reports remain reliable.

U.26	As a <i>Library Specialist</i> , I need to be able to see not only the current affiliation of a TU Delft author, but also any previous affiliations that were recorded in the CRIS, so that I can correctly set the affiliation for a (sub) content type.
U.27	As a <i>Library Specialist</i> , I need the system to allow me to relate a contributor to a TU Delft employee, so that I can confirm their identity and correct and current affiliation.
U.28	As a <i>Library Specialist</i> , I want the system to support adding publications with a large number of authors by making provision to add <i>all</i> TU Delft affiliation without any limit, so that all authors see this publication in their output list.
U.29	As a <i>Researcher</i> , I want to be able to manually add a record for my output - such as a conference paper - with a clear and simple workflow and also upload the PDF(s) for (automatic) addition to the institutional repository without entering the metadata twice (once in CRIS and once in the repository).
U.30	As a <i>Researcher</i> , when I manually add a record and want to add TU Delft affiliated co-authors, I only want to see their name and the organisation unit they are affiliated with. For example, I don't want to see the end date of their employment.
U.31	As a <i>Researcher</i> , I want to be able to include a short biography text in my research profile, so I can give context to my area of expertise.
U.32	As <i>Researcher</i> , I want to see a visualisation showing my collaborators worldwide, both as co-authors or as partners in a project, so I can showcase my network and impact.
U.33	As a <i>Faculty Information Coordinator</i> , I want to make a report for department X on how many articles have been published by specific publishers, so that I can evaluate which publishers are most important or influential in a certain discipline. The report on department X should also include publications affiliated with all organisational units under department X
U.34	As a <i>Faculty Information Coordinator</i> , I want to create reports on one content type (e.g. research outputs) that include, filter and group by information from related content types (e.g. publishers, organisational units, persons, projects, funders), so that I can answer analytical questions within the system, without exporting data and joining it manually in external tools.
U.35	As a <i>Faculty Information Coordinator</i> , I want publications to be counted consistently across reporting years and organisational levels, taking into account authorship and organisational affiliations, so that I can generate accurate and reliable publication reports without unintended double counting.
U.36	As a <i>Faculty Information Coordinator</i> , I want to be able to create a report based on publications by a specific department based on affiliation, rather than current employment of the department's staff, so I can produce reliable data for an evaluation.
U.37	As a <i>Faculty Information Coordinator</i> , I want to be able to generate a report of all outputs associated with my faculty, authored by a particular user, within a specified timeframe.
U.38	As a <i>Faculty Information Coordinator</i> , I want to be able to create reports based on as many as 10.000 records, without the system becoming temporarily unresponsive, so I can keep doing other tasks.