Tender
8/28/2020

Procuring organization
Högskolan i Kristianstad
Maria Gustavsson

Procurement
Current Research Information System
A2020-32-164
Tender closing date: 8/28/2020 11:59 PM

Legend

The text is included in the advert	The text is included in the qualification
The text will be part of the contract	The text will be published in the contract catalogue
The text/question contains requirements to be met	ESPD The text/question contains ESPD requirements
The question is weighted and included in the evaluation	The question is weighted and included in the evaluation
The question is asked for information only	The question is answered by the buyer
The question is marked for special follow-up	The answer does not meet the requirement in the question

Tenderers

Supplier	Tender	Corporate ID	Qual.
Elsevier BV	Current Research Information System	33158992	

1. General requirements

1.1 Introduction

Kristianstad University is issuing an invitation to tender for procurement of a Current Research Information System.

This procurement document includes all of the information, requirements, terms and conditions required to submit a tender.

A contract will be signed with one (1) supplier

1.1.1 Scope

The scope of the procurement is a fully developed and operational Current Research Information System (a so-called CRIS) for Kristianstad University, in order to collect, store and re-use information mainly about,

- researchers,
- research units,

- research projects,
- research funding,
- research outputs (publications and other results),
- research-related activities,
- research infrastructures,

in a a systematic and efficient way across the entire university.

Kristianstad University collects this information centrally to;

1) increase the visibility of research carried out at Kristianstad University by display of different subsets of information on the web,

2) provide insights, overview and documentation of the research taking place at Kristianstad University and provide material for evaluation, accreditation and other purposes,

3) reduce workloads for researchers and administrative staff related to reporting their research to a range of different stakeholders.

The four Facultys of Kristianstad University; Faculty of business, Faculty of Health science, Faculty of Education and Faculty of National Science, will be using the system in order to minimize manual workload related to research information such as reports and statistics.

The system will function together with other systems at Kristianstad University, with integrations to and from other systems.

In order to obtain satisfactory data quality, certain users of the system will have roles and rights to perform quality control and management of the data.

Given the rapid international development of standards and technology in the field of research information management, it is important that the system is up-to-date with this development and pursuant to it.

1.1.2 Contracting authority - Kristianstad University

The contracting authority and purchaser is Kristianstad University, in Swedish - Högskolan Kristianstad (abbreviation HKR)

Kristianstad University is a university in southern Sweden. The university is gathered in one campus situated just 10 minutes from the town centre of Kristianstad. Kristianstad University was founded in 1977, but we can trace our roots back to 1835 and the start of the teacher's training. We are proud of our 14,000 students and the diversity they represent. We have about 500 employees.

Our keywords are openness, curiosity and respect. Our research is challenge-driven and integrated with our degree programmes.

International collaboration is important to Kristianstad University. We are active proponents of international mobility. Students and faculty collaborate to cultivate understanding of other cultures and traditions. We participate in exchange programmes and network with many universities.

For more information, please visit www.hkr.se

1.2 Administrative regulations

1.2.1 Procurement procedure

The procurement is carried out as an Open procedure pursuant to the Swedish Public Procurement Act (2016:1145), LOU.

This form of procurement does not permit negotiations with tenderers, and it is consequently essential that the optimal conditions are set out in the tender.

1.2.2 Form, content and submission of the tender

The tender must show the information requested. Tenders that do not include the information requested may be rejected.

A tender must be submitted for the entire delivery because it constitutes a whole. If the contract is split among different suppliers, there is a serious risk of inadequacies in the whole.

Tenders must not be alternative or combination tenders.

The tender must be submitted no later than 8/28/2020 11:59 PM

1.2.3 Language

Tenders must be submitted in English or Swedish.

1.2.4 System for submitting tender - TendSign

Kristianstad University uses electronic tendering via the Visma TendSign procurement system in this procurement.
Tenderers who wish to participate must submit electronic tenders via Visma TendSign (www.tendsign.com, support: tendsignsupport@visma.com).

It is free for suppliers to use this system and submit tenders.

Responses to questions submitted during the tendering period and award decisions following completion of the evaluation of submitted tenders are sent via the email address specified in Visma TendSign. It is therefore important to provide an email address that will be monitored throughout the procurement procedure.

1.2.5 Presentation

Tenderer must be available, if so requested, to give a presentation of the tender in order to demonstrate that the system met all of the requirements. The presentation can be held digital, by remote meeting. The presentation will take place during week 36.

1.2.6 Questions and answers

It is important that you contact us to avoid misunderstandings if the procurement document is considered to be unclear or if any of the requirements laid down are unreasonable, abnormally costly or anti-competitive in any respect.

Questions during the tendering period should be asked through the question and answer function in Visma TendSign and will be answered through Visma TendSign. Questions and answers will be published in the Visma TendSign.

Questions must be submitted at the latest 8/24/2020 and are answered at the latest 8/25/2020. We have limited ability to publish answers to questions before 8/17/2020.

1.2.7 Compensation for tenderer’s expenses

Kristianstad University does not compensate expenses incurred in connection to tenders.

1.2.8 Public access and commercial secrecy

Kristianstad University is a public authority and subject to the Swedish principle of public access. This means among other things, that documents should be available for those who wish to review them. The tenderer in this procurement must understand that the tender, after the award decision, as a general rule is a public document.
The possibility for tenderers, with the support of the Public access to Information and Secrecy Act (2009:400), to obtain confidentiality in documents that are a part of the tender, is generally very limited. Some information may be subject to confidentiality under the Act, so-called commercial secrecy. For commercial secrecy it is required that the information relates to the tenderer's business or operating conditions, and that there are specific reasons to assume that the tenderer will be harmed if the information is disclosed.

If the tenderer considers that information provided during the procurement is subject to commercial secrecy, the tenderer should state, in the tender, a wish of commercial secrecy, including details of the information in question and the damage caused to the tenderer if the information is disclosed. We however, will make an independent assessment of whether or not commercial secrecy exists.

Do you wish to obtain confidentiality in any details that are a part of the tender? If yes; specify the details of the tender that the confidentiality concerns, motivate your wish for confidentiality and specify what damage you would suffer if the information would be disclosed

Text field

No

1.3 Tenderer requirements - exclusion and prequalification

Tenderers must confirm that the grounds for exclusion do not exist and that you meet the qualifying requirements by answering and confirming the questions under each requirement.

A tenderer may instead provisionally prequalify itself to participate in this procurement by attaching a completed standardised self-declaration, European Single Procurement Document (ESPD). A tenderer that has answered the questions under the ‘Tenderer requirements’ section does not need to submit an ESPD.

A tenderer shall, on request from Kristianstad University, supplement with one or more documents. Such request can be made at any time during a procurement procedure if we find it necessary in order for the procurement to be conducted correctly.

On request, the tenderer that we intend to award the contract shall submit supplementary documents, showing current conditions. Such request shall be made before we decide to award the contract.

The tenderer shall, on request, supplement or clarify the documents that we have requested.

Tenderer is not obliged to submit supplementary documents or other written evidence if the contracting authority already has access to the materials or can itself get access to certificates or relevant information free of cost and directly using electronic means.

1.3.1 Exclusion of tenderer

1.3.1.1 Grounds relating to criminal convictions

The tenderer must be excluded from participating in the procurement if the tenderer has been sentenced, according to a final judgment, for an offence under Chapter 13, Section 1 Public Procurement Act (2016:1145), LOU.

If the tenderer is a legal person, the tenderer must be excluded if a person, who is a member of the tenderer's administrative, management or supervisory body, has been sentenced for such offence. The same applies if the person sentenced for the offence has powers of representation, decision or control in respect of the tenderer.

Answer below if the tenderer has been found guilty, by final judgment that has entered into legal force, for one of the following crimes;

a. participation in a criminal organisation?

Yes/No. No is required

Answer

No

b. corruption?

Yes/No. No is required

Answer

No

c. fraud?

Yes/No. No is required

Answer

No

d. terrorist offences or offences linked to terrorist activities?

Yes/No. No is required

Answer

No

e. money laundering or terrorist financing?

Yes/No. No is required

Answer

No

f. child labour and other forms of trafficking in human beings?

Yes/No. No is required

Answer

No

1.3.1.2 Unpaid taxes and social security contributions

The tenderer must be excluded from participation in the procurement if the tenderer does not fulfill its obligations regarding payment of taxes and social security contributions in its home country or in the country where the procurement is taking place, and this has been established through a binding judicial or administrative decision that has entered into force (Chapter 13, Section 2 LOU).

We will obtain proof of payment of taxes and social security contributions for the tenderers who have these obligations in Sweden. Tenderers based in countries other than Sweden must be prepared to provide relevant documents in case we are not able to take part of these ourselves.

Has the tenderer fulfilled its obligations regarding payment of taxes and social security contributions?

Yes/No. Yes is required

Answer

Yes

1.3.1.3 Grounds relating to insolvency, conflicts of interests or professional misconduct

The tenderer may be excluded from participation in the procurement if the tenderer does not fulfill requirements under Chapter 13, Section 3 LOU relating to misconduct in a supplier's operations.

The tenderer must confirm, as far as you know, that the following situations do not exist.

a. Has the tenderer breached its obligations in the field of environmental, social or labour law?

Yes/No. No is required

Answer

No

b. Is the tenderer bankrupt or in any analogous situation like bankruptcy arising from a similar procedure under national laws and regulations?

Yes/No. No is required

Answer

No

c. Is the tenderer subject of insolvency or winding-up?

Yes/No. No is required

Answer

No

d. Is the tenderer in arrangement with creditors?

Yes/No. No is required

Answer

No

e. Is the tenderer's assets being administered by a liquidator or by the court?

Yes/No. No is required

Answer

No

f. Is the tenderer's business activities suspended?

Yes/No. No is required

Answer

No

g. Has the tenderer entered into agreements with other suppliers aimed at distorting competition?

Yes/No. No is required

Answer

No

h. Is the tenderer guilty of grave professional misconduct?

Yes/No. No is required

Answer

No

i. Is the tenderer aware of any conflict of interest, as indicated in national law, the relevant notice or the procurement documents due to its participation in the procurement procedure?

Yes/No. No is required

Answer

No

j. Has the tenderer, or an undertaking related to it, advised the contracting authority or contracting entity or otherwise been involved in the preparation of the procurement procedure?

Yes/No. No is required

Answer

No

k. Has the tenderer experienced that a prior public contract, a prior contract with a contracting entity or a prior concession contract was terminated early, or that damages or other comparable sanctions were imposed in connection with that prior contract?

Yes/No. No is required

Answer

No

l. Has the tenderer found yourself in any of the following situations where you:

a) have been guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria,
b) have withheld such information,
c) have not been able, without delay, to submit the supporting documents required by a contracting authority or contracting entity, and
d) have undertaken to unduly influence the decision making process of the contracting authority or contracting entity, to obtain confidential information that may confer upon it undue advantages in the procurement procedure or to negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award?

Yes/No. No is required

Answer

No

1.3.2 Suitability to pursue professional activity

The tenderer must be registered at the time of the tender and throughout the term of the contract in a register of limited companies, partnerships, associations or similar in the State where the supplier conducts its operations.

Is the tenderer registered in such register and where (if not in Sweden) can we find that information?

Text field

Elsevier BV is registered with the Dutch Chamber of Commerce, with reference 33158992 and date of registration 17 December 1979. See: www.kvk.nl

1.3.3 Economic and financial standing

The tenderer must have a stable economic and financial standing at the time of the tender and throughout the term of the contract that meets up to the scope and content of the assignment.

Does the tenderer have a stable economic and financial standing and how can you prove it ?

Text field

Yes, please refer to the company's Annual Financial Statement. The most recent version can be found at this location: https://www.relx.com/~/media/Files/R/RELX-Group/documents/reports/annual-reports/2019-annual-report.pdf

1.3.4 Technical and professional ability

The tenderer must possess the necessary human and technical resources and have the experience required. The organization working with the system must be sufficient and well organized to ensure the reliability of the offered system.

The tenderer demonstrate its ability by a description of the company and by referring to reference assignments.

1.3.4.1 Description of the tendering company

The tenderer must describe the organization of the company, resources and ability to deliver according to the object of the procurement. The group that is working with the system must be sufficiently organized to ensure the operational reliability of the quoted system.

Describe the tendering company or refer to an attached description

Text field

Elsevier is a global information analytics business, employing over 1,000 technologists to create analytics solutions that advance science, technology and healthcare. Our solutions are used at more than 25,000 academic and government institutions globally. We have a long history of collecting, structuring and delivering research information to a global audience and continue to invest $400m annually in the technology to help us achieve this. We also focus on hiring and training next-generation data scientists to help us evolve with our clients.
Elsevier's Research Intelligence (RI) portfolio provides solutions for each stage of the research lifecycle. Our portfolio spans research workflow tools, information management, repositories, research data management, and extends to powerful tools for open educational resources, open access publishing, and support for the full spectrum of scholarly and creative works. Our vision and work strongly support easy access to research data as a cornerstone of success in modern science.

One of the cornerstones of our RI portfolio is Pure, Elsevier’s market-leading Current Research Information System (CRIS). As a versatile and interoperable solution, you can configure Pure to meet the growing requirements of your organisation. Its industry-proven data model unearths multifaceted insights about the overall research lifecycle, supporting both fact-based decision making and industrial-strength expertise discovery. Pure is used by over 250 institutes of education and research globally, and is the market-leading CRIS. A list of Pure customers can be viewed here: https://www.elsevier.com/solutions/pure/clients

1.3.4.2 Reference assignments

The tenderer must have experience of similar assignments as requested in this procurement.

The offered Current Research Information System must have been previously delivered and implemented (in accordance with agreed funcionality), by the tenderer, to at least five (5) different customers.

The customers must be higher education institutions in Europe and the system must have been delivered over the past five (5) years.

The deliveries used as a reference must be specified with name of the customer, contact person with relevant e-mail address, period of delivery and a short description of the scope and the contents of the deliveries.

The deliveries used as a reference must have been conducted according to agreed terms in the contracts. If the assignment is performed as part of a longer contract, or there is a recurring task, there is no need for the agreement to be completed.

The purpose of the customer reference is to enable Kristianstad University, in the event of doubt, to have the tenderer's technical and professional capacity and professional knowledge strengthened.

Describe the five (5) reference assignments or refer to an attached document

Text field

We have attached details of the reference assignments with our response. Please refer to the attached document 1.3.4.2 Reference assignments".pdf'.

1.3.5 Reference to the standing or capacity of another company

The tenderer is entitled to refer to the economic and financial standing of another company to meet the requirements relating to economic and financial standing or refer to another company's technical and professional capacity to meet the requirements relating to technical and professional capacity.

The tenderer must, if it does so, provide the name and corporate/organisation ID number of the company referred to. The tenderer must attach a signed cooperation agreement or corresponding. Evidence of technical and professional capacity requested must also be provided for this company.

Do you refer to the standing or capacity of another company? If so, describe how and attach the requested documents

Text field

No, Elsevier BV does not refer to the standing or capacity of another company.

1.4 Specification of requirements

Under this section you find the general requirements for the delivery of the system.

The document *System requirements*, contains all of the mandatory requirements on functionality and proprieties in the Current Research Information System.

1.4.1 Implementation plan

The supplier shall take full responsibility for the set up and configuration of the system, and the integration of data from source systems at Kristianstad University. The supplier shall provide test scenarios, integration testing and acceptance tests (approved by Kristianstad University).

The tenderer must enclose an suggested implementation plan over the project, to include at least configuring, imports, integrations, test and verification. The plan must contain a timeline, activities and a description of roles and resources both of Kristianstad University and the supplier.

Kristianstad University wish the implementation to start on October 1st, 2020 and the system ready for operation on June 1st, 2021. It must be possible to go live with a full system including all modules/content at the same time, including any imports of legacy data.

A final implementation plan for the delivery will be established in collaboration with Kristianstad University before signing the agreement and shall contain the following information:

- detailed time and activity plan,
- specification of what should be delivered,
- project leaders from both the supplier and from Kristianstad University, including contact details
- responsible project group from the supplier
- list of required resources and information from Kristianstad University needed in order to enable the completion of the delivery
- documentation of what will be tested during the implementation
- routines regarding the management of errors during the implementation
- information regarding the training that the parties have agreed upon with a clarification of the structure and time of the execution

Attach an implementation plan
Attachment

1 attached document

HKR_ImplementationPlan.pdf

1.4.2 Training

During the implementation phase, certain administrators at Kristianstad University must be trained so that they, after training, are able to use and administrate the system effectively and appropriately and in turn be able to further educate the future users of the system internally.

The training must be adapted to the previous knowledge of the relevant personnel.

The training of the administrators during the implementation will take place in Kristianstad (or digital, if travelling is not possible) and shall be included in the total delivery cost.

During the agreement period, the supplier must hold up to four (4) trainings for up to twenty (20) persons at a time. The training will take place in Kristianstad (or digital, if travelling is not possible) and is included in the price, there should be no additional costs for travels, subsistence, accommodations or similar.

a. Is the requirement of training fulfilled?

Yes/No. Yes is required

Answer

Yes

b. Briefly describe the structure of your training

Text field

During your Pure implementation, your Implementation Manager will hold a two-day on-site workshop. This workshop provides in-depth training about the implementation and configuration of Pure. Usually, this meeting is held early in the implementation project, but only after data has begun flowing into Pure through the data integrations. Once data has begun flowing, we design training around concrete client data as this makes it relevant and more tangible for the audience. The on-site training is tailored to your needs, and is aimed at advanced users (e.g. librarians, research support office staff and system administrators). In agreement with our clients we take a “train-the-trainer” approach to end-user training.
Once implementation is nearing the launch phase, your dedicated Pure Customer Consultant will deliver additional training (a combination of onsite and online). Your Customer Consultant has an in-depth knowledge of Pure and best-practices for rolling it out. They will provide continuous training to help you explore the additional functionality in Pure, and will remain as your go-to person for training-related inquiries after launch.

1.4.3 Support

The supplier must, through technical support, manage and resolve errors, provide systematic maintencance and implement security updates to the current version of the system in order to maintain the functionality of the system.

User support must be provided to administrators on system usage, performance and function. User support must also be provided regarding the access to the information resources that the system contains.

Support for administrators must be accessible office hours (8:00-17:00 CET).

All support that require access to Kristianstad University data must be provided from within the EU.

a. Do you fulfill the requirements on support?

Yes/No. Yes is required

Answer

Yes

b. Describe your support organization

Text field

Our global Pure Help Desk is based in Singapore, Denmark and the USA, allowing us to provide the best possible service and response times. We offer near 24/5 support and assign priority to any issues or queries logged, based on client impact.

Our Pure Support team provides technical support to clients. The primary aim of the Pure Support team is to make sure you are using Pure efficiently and having the best possible experience with it. Our Support team handle any issues you encounter quickly and efficiently. This could be assistance with configuring a particular report, adding another data source or any other issue you encounter.
We provide support by telephone, email and online. We use Jira as our online ticketing system, which allows detailed tracking, reporting and analysis of all issues raised, and helps us to continuously improve service.
In case escalation is needed, our Head of Support and our Global Head of Client Services stand ready. They are supported by an experienced team of Pure experts who receive frequent training on any new Pure functionality that we release.
In addition to our Pure Support Team, you will have a dedicated Pure Customer Consultant to provide post-implementation support. The role of the Pure Customer Consultant is to ensure you use Pure optimally and to address any concerns you may have that are not bugs or issues for Jira. Your Pure Customer Consultant is also the starting point for assisting you with the escalation process.

1.4.4 Notification of errors

It must be possible to submit notification of errors twenty-four (24) hours a day, seven (7) days a week and three hundred and sixty-five (365) days a year.

The notification of errors must be made in an online system where the date and time of the notification is clearly stated. In connection with the signing of the agreement, there must be a functional online case management system where all errors are continuously reported and logged.

Kristianstad University must be able to access all reported errors and ongoing cases regarding Kristianstad University.

Is the requirements on notification of errors fulfilled?
Yes/No. Yes is required

Answer
Yes

1.4.5 Development of the system

The tenderer must have an approach to guarantee quality over the release- and development cycle for both existing and new functionality (development of new features, quality assurance before release) and an approach to the system's long term development including the influence the customer will have on the development.

Describe your approach to guarantee quality and long term development of the system
Text field

We have a number of defined processes and tools in place to guarantee quality over the release and development cycle of Pure. Please see our supporting document "Elsevier Pure: Development of the system" for further details.

1.4.6 Accessibility

The tenderer must work actively to be up-date with developments in the field of accessibility. Web interface in the system must comply with web accessibility standards according to European Accessibility Directive* at the latest time end of 2020.

**Directive (EU) 2016/2102 of the European Parliament and of the Council of 26 October 2016 on the accessibility of the websites and mobile applications of public sector bodies*

Describe how you work with developments in the field of accessibility
Text field

Pure features a simple, flexible, and consistent user interface design. Customers can benefit from full-text search, the ability to browse and filter by content type or speciality, and bookmark-friendly content. Accessibility is a high priority on our development team's roadmap. The Pure Portal is optimised for compatibility with screen readers, through the use of (for example) metatags and ARIA-labels to provide descriptions of visual content.

We carry out an annual Voluntary Product Accessibility Template (VPAT) assessment, which is conducted by the Elsevier Accessibility team. During this VPAT assessment, we test the Pure interface to ensure it is screen reader friendly and compatible with screen readers such as JAWS, NVDA and Apple's VoiceOver. Most controls and features are operable using the keyboard and do not require a mouse.

1.4.7 Documentation

Documentation and instructions that are necessary for the administration and use of the system must be delivered upon request during the agreement period. All documentation must be submitted in English and must be delivered digitally and be possible to print in a legible form.

The delivery is only considered as complete when all agreed documentation have been handed over to Kristianstad University.

If development/updating of documentation and/or the system takes place, information regarding this must be sent to Kristianstad University. Service messages and similar information, must also be sent to Kristianstad University.

Is the requirement on documentation fulfilled?

Yes/No. Yes is required

Answer

Yes

1.4.8 Updates and upgrades

Information about new releases must be given well in advance to a contact person appointed by Kristianstad University.

In the event that the supplier wishes to change the system and/or technological platform, the new system and/or technological platform must meet the agreed requirements. If the supplier cannot accomplish this, Kristianstad University owns the right to terminate the agreement or to continue using the existing system.

New releases of the system must be included in the annual license cost.

a. Is the requirement on updates and upgrades fulfilled?

Yes/No. Yes is required

Answer

Yes

b. Explain how you handle updates and upgrades in the system

Text field

Pure provides regular version upgrades and updates as part of its standard maintenance service. To keep up to date with the evolving needs of academic research management, we have 12 releases of Pure per year:
Major releases (3 per year): These include new and improved functionality and system improvements in Pure. The release cycle for major releases is usually February, June, and October of each year.
Minor releases (9 per year): These include minor improvements and bug-fixes. We schedule minor releases for the first week of every month (unless it is a month when there is a major release).
Dash release (only when needed): These include urgent fixes to Pure. After the subsequent minor release, this version is no longer maintained. Upgrades are completed automatically by our operations team as part of a managed release schedule. This takes place in pre-defined maintenance window. The exact dates will be outlined in the Pure release notes.
Critical security issues are handled on a case-by-case basis – we determine how critical an issue is and the actions needed to remedy it. In case you need to take immediate action on a critical security issue, we will notify you with further details of the issue being addressed and any expected downtime.
We perform maintenance upgrades of the underlying Unix Server (the Amazon Linux AMI), as well as ad hoc patching as needed when critical security updates are released for the specific Linux distribution we use. We monitor all servers and regularly back up all modifiable data (databases, files, configuration, etc.).

1.4.9 Data security

The data and information that Kristianstad University will store in the system must be protected from unauthorized access. The confidentiality, intergity, accuracy and availability of information must be secured.

Describe or refer to attached documention on how you handle data security

Text field

We have attached the Elsevier Security Statement with our response. This document describes how data security is handled at Elsevier.

1.5 Evaluation of tender and contract award

Tenderers who are qualified and meet all of the mandatory requirements will be evaluated.

Kristianstad University will award the contract to the tenderer with the tender that is most economically advantageous, which will be assessed based on ground price.

Kristianstad University will award the contract to the tender who fulfill all of the system requirements and offer the lowest price.

1.5.1 Tender pricing

Price should be stated in the form of:

- Total price in Swedish crowns (SEK) for delivery and implementation of the system including training, test/staging server and all other related costs.
- Price in Swedish crowns (SEK) for annual license for entire Kristianstad University, including up to a number of 250 academic staff. The annual licens fee must include service, support, maintenance, training and all other related costs.

Price will be evaluated based on the total price together with the annual licens fee during the maximum contract period (10 years), tender sum.

a. State the total price (SEK) for delivery and implementation

Price field

Price (SEK)

495,157.00

> Supplier: *Our license fees are based on number (headcount) of Current Academic Staff (CAS) using the OECD definition of this. As per your information we have placed you in the banding 1-249 CAS.*
>
> *Elsevier maintains a fixed exchange rate per year for all countries. This is set at the beginning of each calendar year. For 2020 the exchange rate for SEK has been set at 10.59, which has been used for this proposal. The Euro value is EUR 46757*
>
> *Please note that our accounting systems cannot invoice SEK, but Euro.*
>
> *For the implementation the scope includes: Set up (incl. authentication) + project management fees + HR integration + legacy import from DiVA.*

b. State the price (SEK) for annual licens fee

Price matrix. 1 rows

Price matrix grand total (SEK)

3,180,710.00

Specification	Quantity	Unit	Price per unit (SEK)	Total price (SEK)
Annual licens fee.	10	year	318,071.00	3,180,710.00

1.5.2 Options

Kristianstad University would like to know of any possibility of additional options, beyond the scope of this procurement, which can complement the system in the future.

We would also like to know if there are any need for extra consultant assistance for future development assignments and, if applicable, the estimated price.

The prices for options will not be evaluated.

Kristianstad University does not undertake to buy any hours for future assignments or use options.

a. Give an account for the possibility of additional options and state the price of each option

Text field

1. Mendeley Data

Pure offers Research Datasets as a content type, which means metadata can be included in the database. However, as most institutions are not clear on where there researchers store their datasets, we offer a service by which we find your datasets and allow the import of metadata to Pure. This facilitates a more complete picture of your research related activities. This service is called Mendeley Data Monitor and costs EUR 3000 per annum (SEK 31770). Note that this service can also be procured for a single year.

In addition, Mendeley Data offers a secure dedicated Datasets repository with collaborative working space (incl ability to add external persons to a team) and this costs EUR 8000 per annum (SEK 84720)

2. Funding Institutional

Pure offers integration with Funding Institutional, which is a database that stores funding opportunities from more than 5000 sources. Opportunities can be searched and saved, shared, alerts created, and more. All opportunities can be imported into Pure directly into the Award Management Module workstream that you have set up. The costs for access to the opportunity database and service is EUR 9000 per annum. (SEK 95310)

3. Dedicated Hosting

As part of this procurement proposal we have added "standard hosting", which means we auto-update your Pure instance once per month. First to your staging environment, and then to your production environment a while after. Some institutions prefer to 'control' the timing of the release updates and we offer a "dedicated hosting" service to facilitate that. This means you can contact us to schedule a release (please allow a little lead time). Some institutions prefer to update note every month, but every 3 months, in which case the updates are cumulative. The costs for this type of hosting is EUR 14792 per annum (SEK 156647) for a production and staging environment (the standard hosting costs is EUR 4510 per annum (SEK 47761) and has been added to your annually recurring license fee).

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b. Give an account of need for extra consultant assistance for future development assignments and state the price (or the hourly rates for consultants)

Text field

Under the comments for the implementation price we have included the scope for this proposal. Should any other services be warranted we can easily add them. We use fixed tariffs for that. Adding for example an integration with your finance system will cost Euro 6494 (SEK 68771)

Following implementation, it may come to pass that you request our assistance. Typically, a call is logged in our online issue ticketing service (JIRA) where our team triages your request. At times, this is simply supported at no costs as part of our support service. At other times, some additional out of scope work may be needed, which is then discussed with you. Our day rate is EUR 1040 (SEK 11013). Note that the lowest block of time we allocate is half a day, which means our lowest rate is EUR 520 (SEK 5507).

1.6 Contract terms

1.6.1 Parties

Kristianstad University, Org.nr: 202100-3195, 291 88 Kristianstad, Sweden

Supplier: [*name, organization number, postal address*]

1.6.2 Contact persons

For Kristianstad University: [*name, e-mail, telephone*]

For the Supplier: [*name, e-mail, telephone*]

Provide name and contact details to your contact person in contract matters

Text field

Mrs Helen Kardinaal de Mooij
Solutions Sales Manager
h.mooij@elsevier.com
+31 6 12774890

1.6.3 Priority of documents

These contract documents complement each other. If it should transpire that the contract documents conflict in any respect, they will apply inter se in the following order, unless the circumstances manifestly give cause to do otherwise:

1. Written amendments of and supplements to this contract
2. This contract, including appendices
3. Any clarifications of the procurement document
4. The procurement document, including appendices
5. Any clarifications of the tender
6. Tender including appendices

1.6.4 Term of contract

The contract period is four (4) years from the signing of the agreement with an option for Kristianstad University to extend the validity of the contract with six (6) one (1)-year periods up to ten (10) years total. After that time, the agreement will unconditionally expire with no further notice.

A request for extension of the agreement must be announced by Kristianstad University no later than three (3) months prior to the expiration of the contract term. The request for extension must be submitted in writing.

1.6.5 Scope

The Supplier undertakes to deliver a Current Research Information System, CRIS, to Kristianstad University in accordance with this agreement, the documents that were the basis of the procurement and the tender which forms the basis of the procurement.

The scope of the delivery is stated in the procurement document and in the tender that has been awarded.

This agreement regulate the continuous deliveries of updated versions of the system, operation of the system and support to the administrators. These conditions will enter into force when the commissioning has occurred.

The agreement also regulates the licensing of the system and the software, i.e. the right to use the system.

The delivery also includes:

- documentation for use and complete technical documentation
- training as specified
- a testing/stage server

The parties are aware of the fact that the contract cannot regulate all questions that may arise during the contract period as a result of constant development and changed conditions. The parties must endeavour to adapt to any new conditions that may arise during the contract period and the cooperation must be based on mutual understanding and trust.

1.6.6 Quality and performance

Services included in this contract must, in terms of performance and quality, correspond to the specifications that the Supplier submitted in the tender. A service may only be divert from agreed requirements following the written approval of Kristianstad University.

The Supplier must actively contribute to the service being used in the optimum way.

The service shall be performed in a professional manner and be provided with a high level of competence and availability as well as cost effective.

The Supplier shall produce materials that best meet the specific assignment and the need for Kristianstad University.

1.6.7 Price

Prices are expressed in SEK, excluding value added tax.

The price must include all costs associated with the service, such as travel, travelling time, accommodation, administrative expenses, invoicing charges, insurance, etc.

1.6.8 Price adjustment

The prices are fixed for the contract period, four (4) years). The price may subsequently be adjusted. Both parties are entitled to request a price adjustment upon extension of the validity of the contract. In the event that the Supplier requests a price adjustment, this shall be presented in writing to Kristianstad University.

A complete request for a price adjustment must be submitted no later than three (3) months before the day from which the adjusted price enters into force. A price adjustment enters into force at the end of the month.

Prices may not be adjusted in violation of the general price regulation provisions applicable at any given time.

The request for a price adjustment must include well-documented supporting information for cost changes and Kristianstad University makes an assessment of the reasonableness of price adjustment.

1.6.9 Terms of payment

Invoices may only be issued after delivery has been completed and in accordance with an agreed invoice plan for the contract period.

Payment will be made in against valid invoice as of thirty (30) days net. Corresponding provisions apply to agreed part-deliveries. Krisitanstad University uses electronic invoicing.

No invoicing or administrative charges will be accepted.

The payment of an invoice does not mean that Kristianstad University has approved the service delivered. Kristianstad University reserves the right to withhold the entire payment or part thereof and the right to recover payments already made if there is reason to make an adverse comment in relation to an invoice.

Invoicing of license may, after approved Site Acceptance Test (SAT), be made in advance. Invoicing of delivery, installation, implementation, may be made directly after approved SAT. Other invoicing will take place in accordance with specific agreement between the parties.

The total price for the CRIS is the tender price of the procurement in SEK. If individual invoices are issued in another currency and not corrected to the current exchange rate, the final invoice will be used to correct any deviations to the total amount in SEK so that the total amount does not exceed the tender price.

Penalty interest is payable in accordance with the provisions of the Swedish Interest Act if Kristianstad University does not pay the invoice by the due date.

1.6.10 Date of delivery

The system in question must be delivered, implemented, finally inspected with a completed and approved Site Acceptance Test and ready for operation on June 1st 2021, unless another date of delivery has been agreed with Kristanstad University.

1.6.11 Site Acceptance Test

During the implementation of the system, a delivery control must be made and it will be a Site Acceptance Test, SAT. When the SAT is conducted the functions of the system as well as the content and the availability should be verified in accordance with what is stipulated in this agreement and its attachments.

The Supplier is responsible for the practical execution of the SAT and each party should bear its own costs that are connected to the implementation and testing.

The execution of the implementation, the testing of the system and other various measures are stipulated in the final implementation plan. A written test protocol must be established.

1.6.12 Acceptance of delivery

A delivery approval shall be granted by Kristianstad University. The delivery approval must be in writing in order to be valid.

In order for Kristianstad University to approve the delivery, the system must demonstrate requested functionalities by the end of the implementation period and not contain any faults in relation to the requested functionalities that are relevant to users or the management of the system in accordance with this agreement.

Other faults in addition to the above mentioned shall be considered as reported as faults when the remarks were given during the implementation period. However, these faults must be corrected in the next upgraded version of the system, if the parties have not agreed otherwise.

A final approval of the complete delivery requires that all relevant documentation have been submitted to Kristianstad University and that the agreed training during the implementation phase has taken place.

1.6.13 Inadequacies in performance of the service

In the case of inadequacies in the performance of the service, Kristianstad University shall notify the Supplier in writing and request/take one of the following measures.

1. Demand that the Supplier promptly rectifies the inadequacy or redelivers the service at the expense of the Supplier
2. Demand and obtain such a reduction in price as corresponds to the inadequacy
3. Terminate the contract through written notice to the Supplier

1.6.14 Classification and error handling

Rectification of reported errors must be conducted so that any inconveniences for the users of the system are minimized. The following classifications of errors, error rectification times and terms for the technical support are valid during the agreement period.

The Supplier must initiate error rectifications and resolve reported errors in accordance with the classifications below.

Serious errors
A serious error is regarded as a deviation from the agreed functionalities, whereby at least one essential function regarding both technology and content is not working, and where the consequences cannot be avoided through a change in working methods at Kristianstad University.

As soon as the notification of error has been made, the Supplier must initiate actions to correct serious errors within 12 hours after the support organization has opened (local time). Fault rectification shall be ongoing and serious errors must be resolved within two (2) working days after the notification.

If the Supplier has failed to rectify a serious fault within two (2) working days after the notification, Kristianstad University can give the supplier, in writing, a reasonable final time for rectification within seven (7) working days.

For each additional day the rectification requires is Kristianstad University entitled a deduction of the annual license fee by 10 % a day . If a serious error has not been rectified within the time period, Kristianstad University owns the right to terminate this agreement.

Other errors

Other errors include all other deviations from the agreed functionality that do not constitute a serious error.

The Supplier shall resolve the error in connection to the next release of the system.
If the supplier has failed to rectify the error at the next release after notification of the error, Kristianstad University are entitled to a fine equivalent to 1% of the annual licens fee for each month until the error has been rectified, with a maximum of 10 % the annual licens fee.

When the amount of fines have reached maximum, Kristianstad University has the right to give the Supplier a final deadline to rectify the error. If
the error has not been rectified prior to the deadline, Kristianstad University owns the right to terminate this agreement.

Interpretation of errors

Regarding the classification of errors, the perception of Kristianstad University must prevail.

Reporting
The Supplier must upon request provide a written report of the notified errors and the rectifications that have been conducted.

After an error notification has been issued, the support function should be able to advice on how to avoid such errors in the system by a new approach, a so-called work-around.

1.6.15 Late deliveries

If Kristianstad University does not accept the delivery within the stipulated implementation time, the implementation will continue until the notes in the test protocol and agreed requirements in the requirements specification of the tender are met.

The total time of implementation must be agreed upon together with Kristianstad University.
In case the system after June 1st 2021, still fails to fulfill the requirements regarding the system and its content in accordance with the agreed time plan, Kristianstad University can give the Supplier a final deadline for remediation/fulfilment. This final deadline must be given in writing.

If the delivery notes given at the actual deadline for the implementation have not been remedied by the end of the final deadline, Kristianstad University owns the right to terminate the agreement.

If Kristianstad University terminates the contract in accordance with this item, Kristianstad University has the right to repayment of the part of the purchase sum paid, including interest corresponding to the current reference interest rate.

A penalty shall be paid, for every seven days' time period started after the day which delay of delivery takes place, at 1% of the value of the delivery which has not been possible to put into use, as a result of the delay. However, the entire penalty shall not exceed 10% of the said value.

1.6.16 Premature termination of the contract

Kristianstad University is entitled to terminate this contract or part thereof, immediatly, if:

- the Supplier is put into bankruptcy, enters into liquidation, cancels its payments or in some other way may be assumed to be insolvent,
- the Supplier does not have the necessary permits and licences to pursue the operation.

Kristianstad University is entitled to terminate this contract or part thereof, thirty (30) days after dispatch of the written notice of termination, if:

- the Supplier does not fulfil its payment obligations in respect of taxes, social security contributions and other payment commitments of an employer according to law or collective contract,
- the Supplier neglects its obligations under this contract in material respects and does not implement rectification within thirty (30) days after dispatch of a written notice to do so,
- The Supplier breaches an act, ordinance or provision issued by a public authority.

The Supplier is entitled to give notice terminating this contract or part thereof thirty (30) days after dispatch of the written notice of termination if:

- Kristianstad University neglects its obligations under this contract in a material respects and does not implement rectification within thirty (30) days following a written notice to do so.
- Kristianstad University delays payment under the 'Terms of payment' above and does not make payment to the Supplier no later than thirty (30) days after a written request to do so.

1.6.17 Force Majeure

A party is released from any sanction for failure to perform a particular obligation under this contract if the failure emanates from a circumstance that lies outside a party's control and that prevents the performance thereof. The obligation must be performed as agreed as soon as the impediment has ceased.

Grounds for release are deemed to include, for example, fire, war, mobilisation or unforeseen military call-up of a corresponding extent, confiscation, exchange restrictions, civil commotion or riot, shortage of means of transport, general shortage of goods, fuel restrictions, legal industrial conflict, and also delay in delivery by a subcontractor if the delay is a result of such circumstance as referred to in this item.

The reservation concerning legal industrial conflict is not deemed to constitute grounds for release if a party itself is the subject of or takes such industrial action.

A party who wishes to have a release as referred to above must notify the other party thereof without delay. Written notice must also be given without delay upon cessation of the grounds for release.

A party must make reasonable efforts to mitigate the scope and effect of grounds for release and resume performance of the obligations that were impeded as soon as this can practically be achieved.

1.6.18 Liability and insurance

The Supplier is responsible for the damage that they cause Kristianstad University through lack of special skills, breach of customary care or other negligence in execution of the assignments or deliveries in accordance with this agreement.

If Kristianstad University can show that a damage has occurred and made it probable that the damage is caused by an inaccuracy in the Supplier's execution of the assignment or the maintenance, the Supplier must, in order to avoid responsibility for the damage, prove that the damaged caused was beyond their control.

The Supplier is responsible for arranging the necessary insurance cover for its responsibilities and undertakings with respect to property and persons until the end of the contract period.

On request, the Supplier must send copies of the insurance policy or other proof of valid insurance to Kristianstad University.

1.6.19 Agreement follow-up

The contracting parties must have a consistent understanding of the purpose, scope and quality level regarding the requested services. Throughout the agreement period, an active dialogue concerning the delivery should be carried out and the supplier must actively act in order for the delivery to be conducted in accordance with this agreement.

The purpose of an agreement follow-up is to increase understanding between the parties regarding the conditions that apply to both Kristianstad University and the Supplier and thus reduce the risk that the expectations of the delivery does not match with the perceived customer benefits.

These meetings must be executed at least once a year, or when needed, free of charge.

1.6.20 Entitlement to materials and resources

Kristanstad University has full right of disposal over the agreed information resources.

All data in the system is owned by Kristianstad University.

The Supplier may not analyze Kristianstad University data without Kristianstad University's written consent.

1.6.21 Infringement of intellectual property rights

The Supplier is liable and must hold Kristianstad University harmless for, all costs relating to any such infringements of intellectual property rights, patent rights, trademarks (registered or unregistered) or other intellectual property that may ensue from this contract and the obligations that the contract covers and that are not due to the Kristianstad University's negligence.

1.6.22 Personal Data Processing Agreement

The Supplier will be personal data processor on behalf of Kristianstad University (personal data controller) in regard to the personal data processed in the current reasearch information system. This will be regulated in a separate agreement, (Personal Data Processing Agreement), see appendix.

1.6.23 Laws and rules

The Supplier must comply with applicable Swedish laws and ordinances and also applicable regulations, rules and general advice.

Furthermore, the Supplier is responsible for possessing and complying with all requirements prescribed under any permits and licences required.

1.6.24 Subcontractors

The Supplier may not assign the performance of the entire or parts of its commitment under this contract without Kristianstad University's written consent. If the Supplier uses subcontractors, the Supplier is liable for the subcontractor's work as for its own.

1.6.25 Marketing and information

The Supplier is not entitled to use this contract in its marketing without the Kristianstad University's consent

1.6.26 New supplier

In the event that Kristianstad University changes system in the future, when the contract period has ended, the Supplier undertakes to be helpful in the transfer from the Supplier's system to a possible new system.

Upon termination of the agreement, the Supplier undertakes to actively assist and support Kristianstad University in handing over to a new supplier or to a system in-house .

The Supplier is entitled to compensation for reasonable and verified costs for his participation in the handover.

The Supplier is obliged to contribute to knowledge transfer regarding the services and the system.

Kristianstad University has the right to access all documentation concerning migration of data in the system from the Supplier.

1.6.27 Amendments and supplements

Amendments of or supplements to a current contract can only be made by a written document, signed by duly authorised representatives of Kristianstad University and Supplier.

1.6.28 Disputes

Disputes as a result of this contract that cannot be settled amicably are to be finally determined by a Swedish general court applying Swedish law. Any dispute negotiations and hearings are in the first instance to take place in Kristianstad.

1.6.29 Acceptance of terms of contract

The tenderer must accept all of the terms of contract as set out above. The tenderer attaches no other commercial conditions to the tender. Other commercial conditions attached to the tender will not be considered.

Do you accept all terms of contract?

Yes/No. Yes is required

Answer

Yes

2. System requirements

2.1 Overview functionality

The system must be an existing Current Research Information System ("CRIS"), that supports handling of large amounts of research information for Kristianstad University (HKR) over time, including legacy data for past years, following all the specifications in this document.

The CRIS must include;

- An internal database and user interfaces for researchers and administrators ("backend"), including functionalities for making reports.
- A platform for displaying selected parts of the information public in a Research Portal for Kristianstad University, hereinafter called the "Portal".
- Export functionalities, including an fully documented API, for all data.
- Possibilities to create relations between records of all content types.

All functionalities must be fully developed, tested and operational by the tenderer at the time of the tender. Answers to the below requirements must refer to existing service, unless otherwise stated in this document.

In order to verify that the requirements are met, a system documentation/manual on functionality and technical details must be enclosed with the tender.

a. Does the system met the requirements on overview functionality?

Yes/No. Yes is required

Answer

Yes

b. Is system documentation attached? Explain briefly the kind and structure of documentation

Text field

We have attached a PDF copy of the Elsevier Pure: Reference Document. This document provides information about the technical functionality offered by Elsevier Pure. It is intended for anyone who needs to use Pure. This includes those currently using Pure, as well as those interested in learning more about what Pure can do. Pure users typically include people who work in an institution's IT department, research office, or are librarians with a high level of technical proficiency.

2.2 Content types

The system must support handling of all of the following main types of information, hereinafter called “content types”:

- Persons
- Research units and organisational hierarchy for Kristianstad University
- Research outputs (including, but not limited to, publications and their full texts)
- Research projects
- Research funding (grants/awards)
- Research infrastructures
- Research-related activities

The system must also support handling of information on:

- Users and their user roles in the system
- External organizations related to research at Kristianstad University
- External persons related to research at Kristianstad University

Requirements on each content type are specified in the following sections.

2.2.1 Persons - metadata and files

In order to keep a registry of Kristianstad University’s researchers and other personnel, for public display of researcher profiles as well as for reports, the system must support handling of the following information on persons:

- First and last name
- Alternative names
- Date of birth
- Gender
- Titles (one or many, academic and professional)
- Organisational affiliations (one or many) within Kristianstad University, start and end date for each affiliation and organisational roles the person has/had on that specific internal affiliation (one or many from a HKR-defined list)
- Affiliations to external organisations
- Contact information, as a minimum email, telephone, visit- and postal addresses, web addresses (one or many and may differ between internal affiliations).
- IDs, one or many, including e.g. HKR-internal id(s), ORCID, Scopus ID, Researcher ID
- Links to other personal webpages
- Image
- Structured information on educational and professional background.
- An HKR-defined set of one or many descriptive text fields.

a. Does the system support handling of above listed information on persons?

Yes/No. Yes is required

Answer

Yes

Supplier: *This is supported by the Persons content type in Pure. Persons in Pure are academic staff members of different types; professors, PhDs, teaching personnel, research assistants, etc.*

The Persons content type supports handling of the following information:

- First and last name
- Alternative names
- Date of birth
- Gender
- Titles (one or many, academic and professional)
- Organisational affiliations (one or many) within Kristianstad University, start and end date for each affiliation and organisational roles the person has/had on that specific internal affiliation (one or many from a HKR-defined list)
- Affiliations to external organisations
- Contact information, as a minimum email, telephone, visit- and postal addresses, web addresses (one or many and may differ between internal affiliations).
- IDs, one or many, including e.g. HKR-internal id(s), ORCID, Scopus ID, Researcher ID
- Links to other personal webpages
- Image
- Structured information on educational and professional background.
- An HKR-defined set of one or many descriptive text fields.

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.1. Persons" in the Elsevier Pure Reference Document.

2.2.2 Person - specific functionality

The system must met the following requirements on specific functionality for the content type Person. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support that some key data on persons (for example names, titles, date of birth, IDs including HKR-internal ID and ORCID ID, organisational affiliations, organisational roles) is kept up-to-date via integration to HKR-internal systems, while other data is registered directly in the system

Text field

This is supported in Pure, provided the data in HKR's internal system can be extracted and transformed into XML that conforms to the Pure XML schema definitions. You can schedule a Job in Pure to automatically synchronize data between the two systems - when a change is made in the source data, it is reflected in Pure after the Job runs. For more details, see "2.1.1 Persons" and "4. Getting data in and of Pure" in the Elsevier Pure Reference Document.

b. The system must support that all personnel is included in the database, not just those with academic positions and including undergraduate students

Text field

This is supported in Pure by assigning the appropriate roles to different personnel. For example, Technical Administrator for Pure at Kristianstad can configure Pure at a technical level. You can add undergraduate students as Students or Non-academic staff in Pure and they will not count towards your licence allocation. For more details, see "3.3 Other user roles" in the Elsevier Pure Reference Document.

c. The system backend must have a profile page for persons, where the person can easily access all information on their profile, as well as related content of all content types

Text field

This is supported in Pure by the Personal overview workspace. The Personal overview workspace is different from other workspaces in Pure as it is personalized to each individual Person. They will see their own research portfolio, credentials, picture, and more. The Personal overview workspace is also where Persons determine the content that is shown on their Pure Portal profile. For more details, see "3.2.1 Personal Profiles" in the Elsevier Pure Reference Document.

d. It must be possible for persons to create personal CVs based on the information on their profile, and related content (research output, projects, activities etc)

Text field

This is possible in Pure using the CV module. Persons can create one or more private CVs, and one for public display at an institutional portal. CVs can be compiled from all content that is related to the user, including outputs, activities, projects, awards etc. For more details, see "13. CV management" in the Elsevier Pure Reference Document.

e. The system must also support that;

- a person can change name several times, and keep track of alternative names in the person record,

- contact details may differ between affiliations, for persons with several simultaneous internal affiliations.

- organisational roles (dean, head of department etc) may differ from the job title (professor, PhD student etc) of the person

Text field

These requirements are supported by Pure:

- Persons can change their name several times and track their alternative names in Pure using the name variants field on their profile. Persons can add multiple different names to their profile.
- Persons can be affiliated to multiple internal organisations simultaneously. They can add different contact details for each affiliation.
- When updating their organisational affiliation, Persons can add a different organisational role to their job title.

For more details, see "2.1.1 Persons" in the Elsevier Pure Reference Document.

f. It must be possible to keep a person's record (and related material) after a person has left HKR, in order to include such records (and material) in analyses and to be able to reactivate a person's profile again if he/she comes back

Text field

This is possible in Pure by setting an end date on an affiliation. If a Person decides to re-join after leaving, you can reactivate their profile by adding their latest affiliation at your institution. For more details, see "2.1.1 Persons" in the Elsevier Pure Reference Document.

2.2.3 Units and organisation - metadata

In order to keep a registry of information on Kristianstad University's internal units and its organisational hierarchy the system must support handling of the following information;

- Type of unit (HKR-defined list, e.g. faculty, department or research group)
- Name of the unit
- Contact details (visiting and postal address, email)
- Web links
- IDs (HKR-internal id's and other IDs)
- Place in the organizational hierarchy (parent unit)
- A HKR-defined set of one or many descriptive text fields

a. Does the system support handling of above listed information on units and organisations?

Yes/No. Yes is required

Answer

Yes

Supplier: *This is supported by the Organisational units content type in Pure. Organisational units are your institution's faculties, institutes, departments, cross-department research groups, etc. You can organise these units hierarchically in Pure to represent Kristianstad University's organisational structure.*

The Organisational units content type supports handling of the following information:

- Type of unit (HKR-defined list, e.g. faculty, department or research group). You can change the type of unit available for selection using the "Organisation types" classification scheme in Pure.
- Name of the unit. You can add multiple names, including short name, sort name and web name.
- Contact details, including physical address in structured or unstructured format, phone number and email address.
- Web links.
- IDs (HKR-internal id's and other IDs). You can update this list with KHR-specific IDs using the "Types of organisational unit sources" classification scheme in Pure.
- Place in the organizational hierarchy (parent unit).
- A HKR-defined set of one or many descriptive text fields. You can create new HKR-defined text fields from the "Name variants for organisational unit" classification scheme. Add your new classifications to this classification scheme and they will appear in the fields displayed on the Organisations content type.

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.2. Organisational units" and "2.3 Classifications" in the Elsevier Pure Reference Document.

2.2.4 Unit and organisation- specific functionality

The system must met the following requirements on specific functionality for the content type Units and organisation. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support that some key data on units (type, names, hierarchy, contact information, descriptive fields, links, IDs) is kept up-to-date via other HKR-internal systems through an integration, while other data is registered directly in the system

Text field

This is supported in Pure, provided the data in HKR's internal system can be extracted and transformed into XML that conforms to the Pure XML schema definitions. You can schedule a Job in Pure to automatically synchronize data between the two systems - when a change is made in the source data, it is reflected in Pure after the Job runs. For more details, see "2.1.2 Organisational units" and "4. Getting data in and of Pure" in the Elsevier Pure Reference Document.

b. The system must allow more than one parent unit to each unit

Text field

This is supported in Pure, which allows organizational units to have multiple parents. For more details, see "2.1.2 Organisational units" in the Elsevier Pure Reference Document.

c. For units with subunits, the system must support to display content that is related just to that unit, as well as displaying aggregated information for sub-units (e.g. all research outputs for all departments etc related to a faculty)

Text field

This is supported in Pure. You can display all content related to a particular unit or else aggregated content for a unit and its sub-units. For more details, see "2.1.2 Organisational units" in the Elsevier Pure Reference Document.

d. In the selection of units, e.g. for reporting or in the Portal, the system must support that if a unit is selected, all its subunits are selected at the same time (select all). It must also be possible, in the back-end or the Portal, to browse the organisational hierarchy by stepwise unfolding/folding of subunits, without the need to display the entire tree

Text field

This is supported in Pure. When you select a unit, Pure also selects its subunits at the same time. It is also possible to browse the organisational hierarchy by stepwise unfolding/folding of subunits, without the need to display the entire tree using Pure's hierarchical view of an institution's organisational units. For more details, see "2.1.2 Organisational units".

e. The system must have basic functionality to support common changes of the organisational structure, including as a minimum the scenarios that a unit is moved from one parent unit to another, is taken over by another unit or is discontinued

Text field

This is supported in Pure, which provides you with the flexibility to move organisational units to different parent units or to delete organisational units. For more details, see "2.1.2 Organisational units" in the Elsevier Pure Reference Document.

2.2.5 Research outputs - metadata and files

In order to keep a registry of information on Kristianstad University's research outputs, including full texts in line with our Open access policy, for dissemination as well as bibliometric analyses, the system must support handling of the following information:

- Type of output, HKR-defined list of output types that may change over time
- Title
- Language
- Title in original language
- Subtitles
- Publication date
- Status, as a minimum: submitted, accepted, e-pub ahead of print, published, unpublished
- Whether peer-review or not
- Abstract
- Pages
- Article number
- Journal name, volume and issue number
- Full-text, as an electronically uploaded version, DOI or link
- Information on licence type
- Additional files and links
- Authors, including their internal or external affiliations and role on the output
- Possibility for a free-text note
- For event-related outputs: information about the event (e.g. a conference)
- For chapters and similar: information about the host publication/book
- Where applicable: information about ISSN, ISBN, Series
- For patents: Information about patent number, country, filing date
- For non-textual outputs: form of media
- For theses: Award date, awarding institution, supervisor(s).

a. Does the system support handling of above listed information on research outputs?

Yes/No. Yes is required

Answer

Yes

> Supplier: *This is supported by the Research outputs content type in Pure. Research outputs in Pure reflect a broad range of scientific productions a researcher can be responsible for, or in other ways be related to. All types needed are available; e.g. journal contributions, books and chapters, working papers, conference contribution, many non-textual forms, patents, etc. More can be added. Full-text files can also be stored and managed.*
>
> *The Research outputs content type supports handling of the following information:*
>
> *- Type of output, HKR-defined list of output types that may change over time. You can edit templates and types of Research Output from the Research outputs menu item in the Administrator page in Pure.*
> *- Title.*
> *- Language*
> *- Title in original language.*
> *- Subtitles.*
> *- Publication date*
> *- Status, as a minimum: submitted, accepted, e-pub ahead of print, published, unpublished.*
> *- Whether peer-review or not*
> *- Abstract*
> *- Pages*
> *- Article number*
> *- Journal name, volume and issue number*
> *- Full-text, as an electronically uploaded version, DOI or link*
> *- Information on licence type*
> *- Additional files and links*
> *- Authors, including their internal or external affiliations and role on the output*
> *- Possibility for a free-text note*
> *- For event-related outputs: information about the event (e.g. a conference)*
> *- For chapters and similar: information about the host publication/book*
> *- Where applicable: information about ISSN, ISBN, Series*
> *- For patents: Information about patent number, country, filing date*
> *- For non-textual outputs: form of media*
> *- For theses: Award date, awarding institution, supervisor(s).*

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b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.5. Research outputs" in the Elsevier Pure Reference Document.

2.2.6 Research-output specific functionality

The system must met the following requirements on specific functionality for the content type Research-output. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. Information registration forms must adapt to the type of output so that relevant fields display

Text field

This is supported by Pure. Each type of research output comes with its own unique set of fields that are relevant. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

b. The system must support that a person can publish under another name than the person's present name: the output record must display the person's name as given on the author list of the publication, while at the same time relating the record to the correct individual's record in the system under his/her current name so that the person's full publication list can be collected and displayed by the system irrespective of the name changes

Text field

This is supported by Pure. When adding an affiliated Person, Pure gives you the option of adding a different name for the author on the research output. This does not affect the name on a Person's record. Although the research output displays the different name you added, it will still be related to the Person's record. This enables you to view the Person's full publication list, regardless of the name change. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

c. The system must support different versions of documents to be uploaded (as a minimum: submitted version, accepted author manuscript, final published version, other)

Text field

This is supported by Research Outputs in Pure. For example, in the Article Research Output, you can upload multiple versions of the document and select a value (submitted manuscript, proof, etc.) from the Document version field to describe the version. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

d. The system must support access restrictions on files (open, embargo, restricted by IP domain, closed)

Text field

This is supported by Pure. For example, in the Article Research Output, you can select access restrictions when uploading an electronic version of an article or adding another file. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

e. The system must support cover page generation to downloadable documents
Text field

This is supported by Pure, which allows you to configure a cover sheet that is automatically generated and applied to PDF files that are attached to Research outputs. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

f. The system must support registration of outputs with very large numbers (~thousands) of authors
Text field

This is supported by Pure, which allows you to register outputs with very large numbers of authors. The Author collaborations content type helps manage large numbers of authors in Pure. In our understanding, we support very large numbers and have never run into issues with clients. If numbers become even larger, we will work to support it. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

g. The system must support that number of authors on each publication can be analysed
Text field

This is supported by the Pure Reporting Module. You can make an analysis report, where one of the functions that can be used is "Number of authors (ignoring author filters/groupings)". For more details, see "2.1.5 Research outputs" and "11. Reporting" in the Elsevier Pure Reference Document.

h. The system must manage journal information by a centrally controlled list
Text field

This is supported by Pure. You can use the "Configurable Journal Synchronisation" or "Scopus journal synchronisation" cron job to sync journal information with your XML import file. You can also configure what kind of data should be editable by choosing one time or continuous sync. For more details, see "9. Jobs" in the Elsevier Pure Reference Document.

i. If a user wants to add a journal that is not in the controlled list, it must be possible to add new journals to the list without interrupting the registration of the record
Text field

This is supported by Pure. If a journal is not already recorded in Pure, you can create a new journal when adding an Article research output. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

j. The system must support identification and management of duplicate entries of journals (for administrator users)

Text field

This is supported by Pure, which has preventative and corrective ways of managing duplicate entries. For more details, see "2.1.5 Research outputs" and "5.4 Duplication handling" in the Elsevier Pure Reference Document.

k. The system must support that a researcher can upload output not related to their Kristianstad University affiliation, in order that the researcher can use the system to keep a full personal publication record

Text field

This is supported by Pure. When adding a research output to Pure, researchers can select an affiliation to an external organisation. This is possible, even if the researcher is currently affiliated internally with your institution. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

l. It must be possible to distinguish and filter out these externally published research output from HKR-internal output in both internal and external display as well as in exports and API

Text field

This is supported in Pure. In internal displays, you can add filters to your list of content types to distinguish between internal and externally published content. You can also filter in the Reporting Module.

In the Pure Web Service API, you can filter for whether the API should include or exclude external published research.

In the Pure Portal, you can also filter if the portal includes or excludes externally published research. Externally published research will only be shown on the researcher's personal page, but not in other organisation overviews and lists. For more details, see "2.4 Workflows" and "6. Navigate and search" in the Elsevier Pure Reference Document.

m. It must be possible to select among the most common citation formats in CVs and other exports (APA, Harvard, Vancouver, RIS, BibTex etc)

Text field

This is supported by Pure. When using the CV Module, you can select different citation formats to display your research outputs. You can also export a list of research outputs to different formats, such as PDF, Excel, Word, and select the rendering style. For more details, see ""6.1 Search in Pure" and "13. CV management" in the Elsevier Pure Reference Document.

n. The system must support workflows for content validation for research output metadata and uploaded files. Content validation is where expert users, e.g. librarians or other administrators, check and validate submitted metadata and files in the system before making the record public

Text field

This is supported by workflows in Pure. Workflows allow your institution to keep track of the status of information entered in Pure. Depending on the configuration of Pure at your institution, research output records may undergo either one or two rounds of validation/approval before they are considered complete and correct. In addition to confidentiality settings, items are only available on the Pure Portal depending on their workflow step. For more details, see "2.4 Workflows" in the Elsevier Pure Reference Document.

o. It must be possible to separate validated records from un-validated records

Text field

This is supported in Pure by applying the Workflow filter to your list of content. The Workflow filter enables you to separate validated from unvalidated records. For more details, see "2.4 Workflows" and "6.1 Search in Pure" in the Elsevier Pure Reference Document.

p. It must be possible for researchers and administrators to see which validation stage a specific record is in

Text field

This is supported in Pure. The workflow step showing the validation stage is displayed as a tag on each record. For more details, see "2.4 Workflows" in the Elsevier Pure Reference Document.

q. It must be possible to exclude un-validated data from public availability (display in Portal and API)

Text field

This is supported in both the Pure Portal and Pure Web Service API using a filter that ensures only content in the last workflow step (validated) should be included. For more details, see "4.4.1 Pure Web Service API" and "10.1 Managing Portal content" in the Elsevier Pure Reference Document.

r. The system must have functionality for communication with involved HKR researchers and administrators related to the validation of the records. This communication must take place within the system and be recorded in the system

Text field

This is supported by Pure, which allows you to send other Pure users a message about a record. For more details, see "7.2.1 Message about a record" in the Elsevier Pure Reference Document.

s. The system must support import of research output metadata from established international sources. Please indicate which one(s)

Text field

This is supported by Pure, which can automatically retrieve publication lists from relevant internal and external databases. For more details, see "4.1.2 External databases" in the Elsevier Pure Reference Document.

t. The system must support file import of research output metadata in, at least, the following formats: BibTex, Ris

Text field

This is supported by Pure. Once you have created a list of research outputs, you can export this list to various formats including BibTex and RIS. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

u. It must be possible to carry out bulk imports of research output based on individual researchers or based on organisational affiliations

Text field

This is possible in Pure. You can bulk import research outputs by connecting look-up IDs for persons and organisations. This enables you to import information related to a person and /or an organisation as they all must be linked. For more details, see "4.2 Bulk Import Wizard" in the Elsevier Pure Reference Document.

v. The system must support import of citation data from established international sources. Please indicate which one(s).

Text field

This is supported by Pure, which automatically populates a record with metadata from Scopus and Web of Science when you import from these sources. For more details, see "2.1.5.1. Metrics about your research output" in the Elsevier Pure Reference Document.

2.2.7 Projects - Metadata and files

In order to keep a registry of Kristianstad University's research projects, for public display, links to other research information and for reports on e.g. collaborations, the system must support handling of the following information about Kristianstad University's research projects, as a minimum

- Type of project (HKR-defined list of project types)
- Title
- Acronym
- Start and end date
- Participants, including their internal or external affiliations and roles in the project
- Participating organisations
- Links to external webpages
- IDs (one or many)
- Documents
- A HKR-defined set of one or many descriptive text fields

a. Does the system support handling of above listed information on projects?

Yes/No. Yes is required

Answer

Yes

Supplier: *This is supported by the Projects content type in Pure. Projects in Pure hold rich information about Kristianstad University's research projects. Projects may be externally funded, non-funded, or internally funded (or a mix). The Projects content type supports handling of the following information:*

- Type of project (HKR-defined list of project types). You can edit project templates and types from the Projects menu item in the Administrator page in Pure.
- Title
- Acronym. You can create an Acronym field from the “Unified Project Model: Project Descriptions” classification scheme. Add a new classification called “Acronym” to this classification scheme and it will appear in the fields displayed on the Projects content type. For more details, see “2.3 Classifications” in the Elsevier Pure Reference Document.
- Start and end date
- Participants, including their internal or external affiliations and roles in the project
- Participating organisations
- Links to external webpages
- IDs (one or many)
- Documents
- A HKR-defined set of one or many descriptive text fields. You can create new HKR-defined text fields from the “Unified Project Model: Project Descriptions” classification scheme. Add your new classifications to this classification scheme and they will appear in the fields displayed on the Projects content type. For more details, see “2.3 Classifications” in the Elsevier Pure Reference Document.

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.7 Projects" in the Elsevier Pure Reference Document.

2.2.8 Project-specific functionality

The system must met the following requirements on specific functionality for the content type Project. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. It must be possible for all active persons in the system to register projects.

Text field

This is supported by Pure. All active persons can register projects in Pure. For more details, see "2.1.7 Projects" in the Elsevier Pure Reference Document.

b. It must be possible to differentiate projects from their funding so that projects and funding are accordingly kept as separate registries. The funding of a project must be indicated by the link to its grants/awards

Text field

This is possible in Pure. Projects are recorded in the Projects content type, while funding is recorded in the Awards content type. You can link an Awards content type to a Projects content type, in order to indicate where a Project's funding comes from. For more details, see "2.1.8. Awards" and "12. Award management" in the Elsevier Pure Reference Document.

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c. It must be possible to link more than one funding source (grant/award) to a project

Text field

This is possible in Pure by adding related funding sources to the "Related applications and awards" section of a Project. For more details, see "2.1.7 Projects" in the Elsevier Pure Reference Document.

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d. It must be possible to create projects without related funding

Text field

This is possible in Pure. "Related applications and awards" is an optional section when creating a Project, therefore you do not require related funding. For more details, see "2.1.7 Projects" in the Elsevier Pure Reference Document.

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e. It must be possible to set up the most common relations between projects indicating their relative role in a logical way: sub-projects, predecessor projects etc

Text field

This is possible in Pure, from the "Related projects" section of a Project. You can categorise the related project as being a predecessor, successor, originator, derived from, part of, contains, associated to, or associated with, the project that you are creating. For more details, see "2.1.7 Projects" in the Elsevier Pure Reference Document.

2.2.9 Research funding (grants/award) - Metadata

In order to record detailed information on external research funding, to report on it and to link it to other research information, the system must support handling of the following information about Kristianstad University's research funding (grants/awards);

- Type of funding (HKR-defined list of funding types)

- Title
- Acronym
- IDs (one or many, internal and external)
- Grant holders, including their internal or external affiliations and roles on the award/grant
- Involved institutions
- Award date
- Start and end date
- Funder
- Awarded amount, both in currency and in SEK.
- Links

a. Does the system support handling of above listed information on research funding?

Yes/No. Yes is required

Answer

Yes

Supplier: *This is supported by the Awards content type in Pure. Awards hold financial details about grants and funding, the project's budget, and any non- financial contributions such as borrowed equipment.*

The Awards content type supports handling of the following information:

- Type of funding (HKR-defined list of funding types). You can edit award templates and types from the Awards menu item in the Administrator page in Pure.
- Title
- Acronym
- IDs (one or many, internal and external)
- Grant holders, including their internal or external affiliations and roles on the award/grant
- Involved institutions
- Award date
- Start and end date
- Funder
- Awarded amount, both in currency and in SEK.
- Links

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.8. Awards" in the Elsevier Pure Reference Document.

2.2.10 Research funding -specific functionality

The system must met the following requirements on specific functionality for the content type Research funding. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. It must be possible to create funding without a related project

Text field

This is possible in Pure. You can create an Award without relating it to a Project. For more details, see "2.1.8 Awards" in the Elsevier Pure Reference Document.

b. It must be possible to create a project based on the grant information (title, start and end date, abstract)

Text field

This is possible in Pure. If a person has not been assigned a role as Submitter/Editor or Administrator of Awards, then they cannot register or modify funding data. For more details, see "2.1.8 Awards" and "3.1 User roles and rights" in the Elsevier Pure Reference Document.

c. It must be possible to limit the registration (and editing) of funding data to a small number of administrators (i.e. not possible for researchers)

Text field

This is possible in Pure, which allows you to create a project based on an award. For more details, see "2.1.8 Awards" in the Elsevier Pure Reference Document.

2.2.11 Research infrastructures - metadata and files

In order to keep a registry of Kristianstad University's research infrastructures, for public display, links to other research information (publications etc) and for reports, the system must support handling of the following information about Kristianstad University's research infrastructures;

- Type of infrastructure (HKR-defined list of infrastructure types)
- Name of the infrastructure
- Acronym
- A HKR-defined set of one or many descriptive text fields
- Contact details (contact person, email)
- Access information (whether internally and externally available for use and what conditions apply)
- Photo
- Links to external web pages
- IDs (one or many)
- Keywords
- Documents

a. Does the system support handling of all of the listed types of information?

Yes/No. Yes is required

Answer

Yes

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

This is supported by the Facilities / Equipment content type in Pure. The Equipment/facilities record is used to keep an overview of the research infrastructures which Kristianstad University is in possession of. For more details, see "2.1.6. Facilities / Equipment" in the Elsevier Pure Reference Document.

2.2.12 Infrastructure-specific functionality

The system must met the following requirements on specific functionality for the content type Infrastructure. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. It must be possible to limit the registration of infrastructures to a small number of administrators (not open for researchers)

Text field

This is supported by Pure. You can select which roles are allowed to create equipment in Pure from the Facilities/Equipment menu item in the Administrator page of Pure. For more details, see "2.1.6 Facilities / Equipment" in the Elsevier Pure Reference Document.

b. The system must support the possibility to organise infrastructures in hierarchal structures (relate sub-infrastructures to a parent infrastructure)

Text field

This is supported by the Facilities/Equipment content type in Pure. If the parent is related to another item, for example a research output, all child facility/equipment will also be associated. For more details, see "2.1.6 Facilities / Equipment" in the Elsevier Pure Reference Document.

2.2.13 Research -related activities

In order to keep a registry of meriting activities like conference participation/organisation, prizes and distinctions, consultancy, expert assignments, examination and supervision etc, for public display, the system must support handling the following information:

- Type of activity (HKR-defined list of activity types)
- Title/Description
- Period and location (as applicable)
- Participants, including their internal or external affiliations and roles in the activity
- Documents
- Links
- For event-related activities: information about the event (e.g. a conference)

It must be possible for all active persons in the system to register their research-related activities.

a. Does the system support handling of the listed information on research related activities?

Yes/No. Yes is required

Answer

Yes

Supplier: *This is supported by the Activities content type in Pure. Activities in Pure cover a range of personal prizes, esteem, participations, engagements, editorial work, and media appearances, etc. that a researcher can organize, participate in or in other ways be related to.*

The Activities content type supports handling of the following information:

- Type of activity (HKR-defined list of activity types). You can edit the templates and types of Activity to suit your institution from the Activities menu item in the Administrator workspace of Pure.
- Title/Description
- Period and location (as applicable)
- Participants, including their internal or external affiliations and roles in the activity
- Documents
- Links
- For event-related activities: information about the event (e.g. a conference)

b. Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

For more details, see "2.1.9. Activities" in the Elsevier Pure Reference Document.

c. Is it possible for all active persons in the system to register their research-related activities?

Text field

This is possible in Pure. All active persons can register research-related activities in Pure. For more details, see "2.1.9 Activities" in the Elsevier Pure Reference Document.

2.2.14 Users

The system must met the following requirements on Users. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must handle user first and last name, user contact info and HKR-internal IDs

Text field

Username, user first and last name, and email address are supported by a User record in Pure. Username and email address are required fields. For more details, see "3. Users in Pure" in the Elsevier Pure Reference Document.

b. The system must support that information about users according to the above is imported from HKR-internal systems?

Text field

This is supported by Pure. You can import User details from external systems into Pure. For more details, see "3. Users in Pure" in the Elsevier Pure Reference Document.

2.2.15 External organizations - metadata

In order to keep a registry of external organizations that Kristianstad University collaborates with within research, the system must support handling of following information about external organizations:

- Type of Organisation
- Name of the organisation
- Alternative names (in Swedish and English etc)
- IDs (one or many, internal and external)
- Location, including address, geolocation and country.

Does the system support handling of above listed information on external organisations? Refer to where in the enclosed documentation it appears, or provide an explanation

Text field

This is supported by the External organisations content type in Pure. External organisations generally represent a workplace linked to an External person record. They may also represent funding councils or other stakeholders - in short, any organisation that is not a part of your institution. For more details, see "2.1.4. External organisations" in the Elsevier Pure Reference Document.

2.2.16 External organizations - specific functionality

The system must met the following requirements on specific functionality for the content type External organizations. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support analysis of which other records (research output, projects, activities etc) that are related to a specific external organisation

Text field

This is supported from the Relations tab on an External organisation in Pure, which lets you view the connection of the external organisation to other content types in Pure. For more details, see "2.1.4 External organisations" in the Elsevier Pure Reference Document.

b. When a user wants to add an external organisation to other content (e.g. a project), the system must support efficient use of the main list of external organisations, so that the researcher primarily picks from this list

Text field

This is supported by Pure, which allows you to search for external organisations from a saved list when adding an organisational unit for a research output. If the name does not appear in the saved list, you can create an external organisation directly from there. For more details, see "2.1.4 External organisations" in the Elsevier Pure Reference Document.

c. If a researcher wants to add external organisations that are not in the list, to a record of any content type, researchers must be able to add new external organisations directly to the list without this interrupting the registration of the record

Text field

This is supported by Pure, which allows you to search for external organisations from a saved list when adding an organisational unit for a research output. If the name does not appear in the saved list, you can create an external organisation directly from there. For more details, see "2.1.4 External organisations" in the Elsevier Pure Reference Document.

d. The system must support identification and management of duplicate entries of external organisations and it must be possible to merge duplicate external organisations and their related content (for administrator users)

Text field

Pure also comes with preventive and corrective measures to avoid duplication and ensure quality of your data. This includes duplicate organisational units. For more details, see "2.1.4 External organisations" and "5.4 Duplication handling" in the Elsevier Pure Reference Document.

2.2.17 External persons

The system must met the following requirements on external persons. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must handle first and last namn on external persons

Text field

First and last name are supported fields on an External persons content type in Pure. Last name is a required field. For more details, see "2.1.3 External persons" in the Elsevier Pure Reference Document.

b. The system must handle affiliation (connection to external organisations)

Text field

This is supported by the External organization section on an External persons content type in Pure. For more details, see "2.1.3 External persons" in the Elsevier Pure Reference Document.

2.3 Relations between content

The system must met the following requirements on relations between content. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must allow users to create relations between content, e.g. which publications are related to a specific project

Text field

This is supported by Pure, which has a powerful relational data model at its core. Users can create relations between different content types. For example, you can add a relation between an article and the journal it is published in. When the article is viewed in Pure, the journal title and basic information is visible, but it is also possible to double-click the journal and open that record directly from the publication to see all the details. For more details, see "1. About Pure" and "2.2 Content relations" in the Elsevier Pure Reference Document.

b. It must be possible to display relations both in the backend and the Portal

Text field

This is supported by Pure and the Pure Portal. Relations between different content types can be viewed from the Relations tab of a content type in the Pure backend, and from collaboration and visualization maps in the Pure Portal. For more details, see "2.2 Content relations" in the Elsevier Pure Reference Document.

c. In situations where an internal person is related to a record of any content type, and the person has several different affiliations within Kristianstad University or to external organisations, it must be possible to indicate the correct affiliation

Text field

This is supported by Pure. If Persons have multiple affiliations, they can select the correct one that is related to the content type. For more details, see "2.1.1. Persons" in the Elsevier Pure Reference Document.

2.4 Classification (controlled vocabularies)

The system must met the following requirements on classification (controlled vocabularies). Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. It must be possible to classify records of all content types according to one or many pre-defined classification lists of relevance to each content type

Text field

This is possible in Pure using classifications, which are fixed values that you can add to content instead of free text in order to control input according to your institution’s policies. For more details on classifications, see "2.3 Classifications" in the Elsevier Pure Reference Document.

b. It must be possible to set up custom classifications

Text field

This is possible in Pure. Pure comes with a number of classifications configured, but HKR can add their own custom classifications if required. For more details on classifications, see "2.3 Classifications" in the Elsevier Pure Reference Document.

c. Hierarchal classifications must be supported

Text field

This is supported in Pure and there is no limit to the number of hierarchical levels that HKR can have. For more details on classifications, see "2.3 Classifications" in the Elsevier Pure Reference Document.

d. The system must support publicly visible classifications, as well as classifications only visible internally in the system backend

Text field

This is supported in Pure using keywords. Keywords are similar to classifications, but they can only be accessed from the Administration tab of Pure. For more details on classifications, see "2.3 Classifications" in the Elsevier Pure Reference Document.

e. It must be possible to modify classification lists over time

Text field

This is possible in Pure. If HKR want to modify classification lists over time, they can update existing classifications, reorder classifications, delete old classifications, and add new classifications. For more details on classifications, see "2.3 Classifications" in the Elsevier Pure Reference Document.

2.5 General functionality

2.5.1 Language

The system must met the following requirements on language. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system's internal (backend) and external (Portal) user interface must be available in both Swedish and English

Text field

This is supported by Pure and the Pure Portal, which are both available in Swedish and English. For more details, see "15.1 Supported languages" in the Elsevier Pure Reference Document.

b. Individual users must be able to select language on their own user interface (backend and Portal)

Text field

This is supported by Pure and the Pure Portal. Users can select the language of their own user interface, provided their institution has it installed. For more details, see "15.1 Supported languages" in the Elsevier Pure Reference Document.

c. The tenderer must have a structured plan for how new text resources are introduced and translated during system upgrades and where new functionality is added. Please describe how this is done

Text field

This is supported by Elsevier. We have a structured plan for introducing new translations during each release. For more details, see "15.3 Managing translations" in the Elsevier Pure Reference Document.

d. It must be possible to correct faulty Swedish or English translations

Text field

This is supported by Pure, but differs depending on the type of text requiring translation. For more details, see "15.2 Text resources" and "15.3 Managing translations" in the Elsevier Pure Reference Document.

e. It must be possible to make adjustments to system texts to fit the vocabularies used in Sweden or at Kristianstad University

Text field

This is supported by Pure. You can edit all text resources for English and your selected local language (Swedish in this case) from the Messages & text resources settings. For more details, see "15.2 Text resources" in the Elsevier Pure Reference Document.

f. The system must have support for registration of information in both Swedish and English where relevant, in order to allow display of content in both English and Swedish public interfaces (Portal and other web sites), reports etc.

Text field

In the Pure backend, your institution can install Swedish as a supported UI locale. This allows your Pure users to change the language from their user settings. It also allows them to register content in both Swedish and English. In the Pure Portal, visitors can choose their preferred language from the language dropdown that appears on each page. The languages available for selection in this dropdown are configured in the Pure backend. A fallback language is also available for selection. For more details, see "15.1 Supported languages" in the Elsevier Pure Reference Document.

g. The system must support processing of international characters (UTF-8)

Text field

This is supported by Pure, which processes UTF-8 characters. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

h. The system must support common Swedish standard formats for dates, numbers, time, currency and addresses.

Text field

This is supported by Pure. Swedish Krona is available to select from the System currency & country settings, while dates and time can be configured from Localisation settings. For more details, see "15.4 Other localisation" in the Elsevier Pure Reference Document.

2.5.2 Users and roles

The system must met the following requirements on users and roles. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support ADFS authentication for access to the system backend

Text field

Pure supports ADFS authentication for access to the system backend. For more details, see "16.1 External authentication" in the Elsevier Pure Reference Document.

b. The system must support direct login access to the system for administrator users without ADFS authentication

Text field

Pure supports direct login access to the system for administrator users without ADFS authentication. This is done by Normal Pure login. For more details, see "16. Authentication" in the Elsevier Pure Reference Document.

---

c. The system must allow different user roles to be set up, giving higher editing (create, edit, delete) access for each of the specific content types

Text field

This is supported by Pure, which comes with a number of built-in roles configured. By selecting multiple roles for users, you can give them granular permissions in Pure. For more details, see "3.1 User roles and rights" in the Elsevier Pure Reference Document.

---

d. System-wide, as well as organisationally limited roles must be supported

Text field

This is supported by Pure using global, i.e. system-wide, roles or local, i.e. organisationally limited, roles. For more details, see "3.1.2. Roles in Pure" in the Elsevier Pure Reference Document.

---

e. For organisationally limited roles, it must be possible to assign those roles according to the organisational hierarchy, so that a role applying on e.g. a faculty level has effect on all underlying units. This must be done without the need to individually select all underlying units (all the faculty's departments and their subunits shall be selected when the faculty level is selected) (select all)

Text field

This is supported by organizational roles in Pure, which allow you to select the levels in your organisational hierarchy that the roles to. For more details, see "3.1.2. Roles in Pure" in the Elsevier Pure Reference Document.

---

f. It must also be possible to de-select a subset of subunits

Text field

This is supported by organizational roles in Pure, which allow you to deselect a subset of subunits when assigning roles. For more details, see "3.1.2. Roles in Pure" in the Elsevier Pure Reference

Document.

g. It must be possible to limit the higher editing roles to selected content types, e.g. to just projects

Text field

This is supported by Pure, which allows you to limit editing roles to select content types. For example, Editor of Research output or Editor of awards. For more details, see "3.1 User roles and rights" in the Elsevier Pure Reference Document.

h. It must be possible for individual users to provide another user access to manage their account for them (i.e. to act as a proxy user)

Text field

This is supported by Pure by assigning a trusted user to manage your account. For more details, see "3.4 Trusted users" in the Elsevier Pure Reference Document.

i. The system must support an efficient overview of which users have which roles in the system, and to which organisational units these roles apply

Text field

This is supported by Pure, which gives an overview of the roles that are assigned to your users in Pure, and also an overview of which organisational units these roles apply to. For more details, see "3.1 User roles and rights" in the Elsevier Pure Reference Document.

j. The system must support that administrators can switch to any user’s profile, in order to see what that user sees in a support situation

Text field

This is supported by Pure, which allows administrators to switch to another user's profile, in order to see what that user sees. For more details, see "3.1 User roles and rights" in the Elsevier Pure Reference Document.

2.5.3 Backend user interface

The system must met the following requirements on backend user interface. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must provide user-friendly interaction interfaces for users who are to register information in the system (researchers and administrators).

Please provide a description of how the user experience is an integrated part of the system development.

Text field

This is provided by Pure, which has a user-friendly interface for registering information in the system. For more details, see "14. Usability and display" in the Elsevier Pure Reference Document.

b. The backend interface must have a user-centric approach so that researchers see primarily information related to their profile and relevant to them

Text field

This is supported by Pure. Users only see records and other information that are only relevant to them and their roles. For more details, see "14. Usability and display" in the Elsevier Pure Reference Document.

c. The system must provide individual users an overview of tasks expected of them in the system (related to their specific roles in the system)

Text field

This is supported by Pure. Users can see an overview of tasks assigned to them in the task pane. For more details, see "7.3 Tasks in Pure" in the Elsevier Pure Reference Document.

d. Special backend interfaces must be provided for users who have special roles in the system, e.g. for validation of publications, showing which records need to be handled in a structured form

Text field

This is supported by Pure. Users with certain roles have additional interfaces available to assist them with their tasks. For more details, see "14. Usability and display" in the Elsevier Pure Reference Document.

e. It must be possible for users to select and download records in relevant formats

Text field

This is supported by Pure. You can create lists of content, add filters and then download your lists to formats including BibTex, RIS, MS Word, and Excel. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

---

f. If the system contains other content types than the ones listed in 2.2.1, it must be possible to run the system without activating these additional content types to the end users (researchers)

Text field

It is possible to run Pure without activating additional content types than the ones listed in 2.2.1. For certain content types, you can configure which roles can access them. You also have an option to disable or enable most content types. For more details, see "2.1 Content types in Pure" in the Elsevier Pure Reference Document.

2.5.4 Integrations

The system must met the following requirements on integrations. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support integrations for automated import/export of data

Text field

Pure supports integrations for automated import/export of data. For more details, see "4. Getting data in and of Pure" in the Elsevier Pure Reference Document.

---

b. Integrations to automatically fetch data from internal systems at Kristianstad University must be supported, as a minimum:
- Organisation and organisational hierarchy,
- Internal persons, contact info, organizational affiliations, ORCID
- Users

Text field

This is supported by Pure, which allows you to automatically fetch the following data (as a minimum) from internal systems:

- Organisation and organisational hierarchy. For more details, see "2.1.2 Organisational units" in the Elsevier Pure Reference Document.
- Persons data. For more details, see "2.1.1 Persons" in the Elsevier Pure Reference Document.
- User data from other internal systems. For more details, see "3. Users in Pure" in the Elsevier Pure Reference Document.

---

c. For other content not listed above, the system must support general or bespoke import options to cater for import possibilities that may arise in the future

Text field

This is supported by Pure, provided the data can be extracted from your external source and transformed into XML that conforms to the Pure XML schema definitions. For more details, see "4.1 Integration with other systems" in the Elsevier Pure Reference Document.

d. For records where part of the data is imported via an integration (persons, organisations and users), it must be possible to select which of the imported data that shall be editable in the system

Text field

This is possible in Pure using the "Configurable Person Synchronisation" cron job. This allows you to configure what kind of information you want synced once, instead of continuously. For more details, see "9. Jobs" in the Elsevier Pure Reference Document.

2.5.5 Integrations - Data out

The system must met the following requirements on integrations - data out. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must, at least, have a fully developed and fully documented REST API covering all content types

Text field

This is supported in Pure by the Pure Web Service API. For more details, see "4.4.1 Pure Web Service API" in the Elsevier Pure Reference Document.

b. It must be possible for several different users to simultaneously use the API without adversely affecting the performance of other parts of the system (backend or portal)

Text field

This is supported in Pure by the Pure Web Service API. For more details, see "4.4.1 Pure Web Service API" in the Elsevier Pure Reference Document.

c. Exported records must, at least, follow a fully documented xml-scheme

Text field

This is supported in Pure by the Pure Web Service API, which allows you to extract data to XML or JSON format. For more details, see "4.4.1 Pure Web Service API" in the Elsevier Pure Reference Document.

d. All data fields for all content types must be available for export - by default, or by being made available for export, by the supplier

Text field

This is supported in Pure by the Pure Web Service API. For more details, see "4.4.1 Pure Web Service API" in the Elsevier Pure Reference Document.

e. OAI-PMH must be supported. It must be possible to export data to SwePub

Text field

This is supported by Pure, which has an OAI service for harvesting data based on the OAI-PMH protocol. We have Swepub support via OAI. For more details, see "4.4 Web Services" in the Elsevier Pure Reference Document.

2.5.6 Content management over time

The system must met the following requirements on content management over time. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support that researchers who have quit Kristianstad University are kept in the system, as well as their related content (publications, projects, funding etc)

Text field

This is supported by Pure, which allows you to keep records for former staff members. For more details, see "2.1.1 Persons" in the Elsevier Pure Reference Document.

b. The system must support identification and merging of duplicate records

Text field

This is supported in Pure, which comes with preventive and corrective measures for identifying and avoiding duplication and ensure your data is of high quality. For more details, see "5.4 Duplication handling" in the Elsevier Pure Reference Document.

2.5.7 Search, filter, sort and export

The system must met the following requirements on search, filter, sort and export. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. Searching, filtering and sorting must be supported in the backend interface as well as the public portal, including:
- Global search (across all content types)
- Searches within the content type (e.g. within just projects or publications)

Text field

Searching, filtering and sorting is supported by both Pure and the Pure Portal. Pure and the Pure Portal also support:

- Global search, across all content types.
-Searches within a content type.

For more details, see "6. Navigate and search" in the Elsevier Pure Reference Document.

b. The system must, at least in the backend, support advanced search queries, i.e. to be able to search according to multiple variables and support the use of logical operators (AND, OR, NOT)

Text field

This is supported by Pure, which allows the use of Boolean operators, such as AND, OR, NOT, in your search query. You can also use the Lucene Query Syntax by typing ^ at the start of your search. Visitors to the Pure Portal can use an advanced search form to include or exclude words or phrases in their search. For more details, see "6.1 Search in Pure" and "6.2 Search in the Pure Portal" in the Elsevier Pure Reference Document.

c. There must be functionality, at least in the backend, for users to store their searches for use at another time

Text field

This is supported by Pure. Users can save their searches for future use. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

d. Predefined classifications (controlled vocabularies) must be available for selection in filters

Text field

This is supported by Pure, which makes predefined classifications available for selection in filters. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

---

e. Results from search and filtering must be displayed in a comprehensive and organized manner allowing further search and filtering to be carried out on key fields within the subset

Text field

This is supported by Pure, which displays results in an organized manner and allows you to sort and filter the results. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

---

f. It must be possible to create reports from the search results from the internal user interface

Text field

This is supported by Pure, which allows you to export your list of search results in a variety of formats, including PDF, Excel, HTML, RIS, Word and BibTeX. You can export your results in Excel format to CSV. If applicable, rending formats, such as Harvard, MLA or Vancouver, can be selected for your list. For more details, see "6.1 Search in Pure" in the Elsevier Pure Reference Document.

2.5.8 Reports

The system must met the following requirements on reports. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must contain flexible reporting functionalities, allowing custom reports to be made for all content

Text field

This is supported by the Pure Reporting Module, which allows you to create custom reports on all data you have access to in Pure. For more details, see "11. Reporting" in the Elsevier Pure Reference Document.

---

b. The system must support creation and automated distribution (via e.g. email) of scheduled recurrent reports

Text field

This is supported by the Pure Reporting Module, which allows you to schedule reports for automated creation and distribution. For more details, see "11.1 Creating a report" in the Elsevier Pure Reference Document.

c. It must be possible to restrict access to the reporting functionalities to certain users

Text field

This is possible in the Pure Reporting Module which allows you to restrict access to reporting based on user role. For more details, see "3. Users in Pure" and "11. Reporting" in the Elsevier Pure Reference Document.

d. A user should only be able to make reports on information he/she has access to, given his/her specific role rights in the system

Text field

This is possible in the Pure Reporting Pure Module allows you to only create or view reports relating to content you have access to. This is controlled by user roles. For more details, see "3. Users in Pure" and "11. Reporting" in the Elsevier Pure Reference Document.

e. For all content, it must be possible to select which information details are to be included and shown in the reports

Text field

This is possible in the Pure Reporting Module, which allows you to add columns for each piece of information you want to include in your report. For more details, see "11.1 Creating a report" in the Elsevier Pure Reference Document.

f. It must be possible to exclude certain sensitive data (like personal data) from the reporting functionality

Text field

This is possible in the Pure Reporting Module which allows you to restrict access to reporting based on user role. For more details, see "3. Users in Pure" and "11. Reporting" in the Elsevier Pure Reference Document.

g. The reporting functionalities must support basic analyses and visualisations

Text field

This is supported by the Pure Reporting Module, which supports basic analyses and visualisations. For more details, see "11. Reporting" in the Elsevier Pure Reference Document.

h. The following formats for reports must be supported: Excel, Word, Pdf, CSV

Text field

This is supported by the Pure Reporting Module, which allows you to download reports to PDF, Word, HTML and Excel format. For more details, see "11.2 Sharing reports" in the Elsevier Pure Reference Document.

2.5.9 Access to data

The system must met the following requirements on access to data. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. Users must only have access to modify (create, update, delete) content related to them, and content to which they have special role rights in their system

Text field

This is supported by Pure, which only allows users to modify content related to them, or content which they have special role to modify. For more details, see "3. Users in Pure" in the Elsevier Pure Reference Document.

b. For all content types in the system, it must be possible to indicate which specific records should display publicly or only internally by setting the record's visibility (at least; public/back-end/IP-restricted to within HKR range/restricted to the researcher and administrators)

Text field

This is supported by a record's visibility settings in Pure. For more details, see "10.1 Managing Portal content" in the Elsevier Pure Reference Document.

c. A record’s visibility setting must affect both the display in the public research portal and accessibility for the record in the API endpoints and reports

Text field

This is supported by a record's visibility settings in Pure. For more details, see "4.4.1 Pure Web Service API" and "10.1 Managing Portal content" in the Elsevier Pure Reference Document.

d. The system must support that the files uploaded to a record may have other visibility settings than the metadata record

Text field

This is supported by Pure. If you upload files to a content type record, you can set public access details for the files. For example, open, embargoed, restricted, closed, unknown. The restriction on the file will be overruled by a content type's visibility setting if that is more restricted. For example, if you have a file that is marked as Open, and the visibility is marked as "Backend only", the file will only be visible with backend access, even if you have a direct link to the file. For more details, see "2.1.5 Research outputs" in the Elsevier Pure Reference Document.

e. The system must have reliable functionalities for distributing access to the API to selected users

Text field

This is supported by Pure, which controls access to the Pure Web Service API using API keys. For more details, see "4.4 Web Services" in the Elsevier Pure Reference Document.

f. It must be possible, for certain users, to access all data – including data not indicated as public – via the API

Text field

This is supported by Pure for users who have been assigned an API key with the Administrator account setting enabled. For more details, see "4.4 Web Services" in the Elsevier Pure Reference Document.

2.5.10 Work notes, notification, system communication and email

The system must met the following requirements on work notes, notification, system communication and email. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must support a Terms of use, and Updated terms of use, message

Text field

This is supported by Pure. You can set up a "Terms of agreement" which will be shown on login, either always or until the user accepts this. For more details, see "7.2.2 Terms of agreement" in the Elsevier Pure Reference Document.

b. The system must enable system messages to display at login, e.g. information on an upcoming upgrade

Text field

This is supported by Pure. You can create system messages to display when users login. For more details, see "7.2 System messages" in the Elsevier Pure Reference Document.

c. The system must support system messages to be sent out via email or displayed at login.

- It must be possible to limit such system messages to certain subsets of users, e.g. those with a specific user role, or a specific record.

- It must be possible for individual users to opt out of system-generated email messages.

Text field

This is supported by Pure, which supports system messages to be sent out via email or displayed at login.

- Pure allows you to send system messages to users with specific roles, thereby making it possible to limit messages to certain subsets of users.
- Pure allows individual users to opt-out of system generated messages.

For more details, see "7.2 System messages" in the Elsevier Pure Reference Document.

d. The system must support that email messages are sent to users when they are added to content of any type, e.g. to a project or output. The message must include information on the content added and on who added the content

Text field

This is supported by Pure, which allows users to select whether they are notified when added to content of any type. For more details, see "7.2 System messages" in the Elsevier Pure Reference Document.

e. The system must support internal work notes on all content types

Text field

This is supported by the History and Comments section on a content type in Pure. For more details, see "2.4.1 Changing a record's workflow state" in the Elsevier Pure Reference Document.

2.5.11 Log and statistics

The system must met the following requirements on log and statistics. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system must log all changes being made to data in the system, including how data was changed, by which user and the time of the change

Text field

This is supported by Pure. The audit log captures all changes being made to data in the system, including how data was changed, by which user and the time of the change. For more details, see "8. Audit and log" in the Elsevier Pure Reference Document.

b. The system must have an interface where logs are searchable on e.g. time and/or which specific user made the change

Text field

This is supported by Pure, which has an interface for searching logs. For more details, see "8. Audit and log" in the Elsevier Pure Reference Document.

c. Usage statistics must be available for administrators at Kristianstad University

Text field

This is supported by Pure from the Usage Analytics page. For more details, see "8. Audit and log" in the Elsevier Pure Reference Document.

2.5.12 Public display (the Portal)

The system must met the following requirements on public display (the Portal). Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. It must be possible to adapt the Portal to display Kristianstad University colours and branding features like the University logo.

Text field

This is supported by the Pure Portal. Kristianstad University can display their colours and branding features, including their logo. For more details, see "10.5 Configuration and branding" in the Elsevier Pure Reference Document.

b. All content types listed under 2.2.1 must be available for display in the Portal

Text field

This is supported by the Pure Portal. You can display all content types in your instance of Pure in the Pure Portal. For more details, see "10. Pure Portal" in the Elsevier Pure Reference Document.

c. It must be possible to hide certain content types from display in the Portal

Text field

This is supported by the Pure Portal using visibility settings. For more details, see "10.1 Managing Portal content" in the Elsevier Pure Reference Document.

d. List view, as well as detailed views of a specific record, must be supported

Text field

This is supported by the Pure Portal, which allows visitors to view lists of content before clicking into more detail. For more details, see "10.2 Viewing Portal content" in the Elsevier Pure Reference Document.

e. For each record selected metadata must display

Text field

This is supported by the Pure Portal. Once a record is selected, the portal displays metadata for it. For example, abstract, original language, publication status, etc. For more details, see "10.2 Viewing Portal content" in the Elsevier Pure Reference Document.

f. For each record, the relations to other visible records (of the same and other content types) must show and related records be clickable

Text field

This is supported in the Pure Portal. If a content type is linked to other content, for example if a project has been linked to an award, then you can view and/or click the relation on the right side of the page in the form of Related content . For more details, see "10.2 Viewing Portal content" in the Elsevier Pure Reference Document.

g. The Portal must be available in both Swedish and English, and it must be possible for the visitor to easily switch between a page in one language to the same page in the other language

Text field

This is supported in the Pure Portal. Visitors can choose their preferred language from the language dropdown that appears on each page. For more details, see "15. Multi-lingual support" in the Elsevier Pure Reference Document.

h. For records where information has only been submitted in one language, the Portal must have a fallback strategy so that the record still shows with basic information when the portal is viewed in the other language

Text field

This is supported in the Pure Portal. You can define the fallback language of your institution's portal from the Pure backend. For more details, see "15.1 Supported languages" in the Elsevier Pure Reference Document.

i. The system must support the option for researchers to select certain publications as shortlisted/highlighted on their profiles in the Portal

Text field

This is supported in the Pure Portal. Researchers can select content they want to highlight in their Portal profile from their Personal Profile in the Pure backend. For more details, see "3.2.1 Personal Profiles" and "10.1.1 Researchers" in the Elsevier Pure Reference Document.

j. The Portal must display download statistics for files and documents over time

Text field

This is supported by Pure, which records download statistics for full-text materials and displays them on the Portal. Additional metrics for content types are available via an embedded Plum Print from Elsevier's PlumX Metrics, or via embedded Altmetric Attention Score and donut. For more details, see "10.4 Usage and metrics" in the Elsevier Pure Reference Document.

---

k. The Portal must support pictures uploaded in the system to display, as a minimum to the following content:
- Persons
- Organisation
- Infrastructures

Text field

This is supported in the Pure Portal.

- Persons: Researchers can upload a photo of themselves to their Portal profile from their Personal Profile in the Pure backend. For more details, see "3.2.1 Personal Profiles" and "10.1.1 Researchers in the Pure Portal" in the Elsevier Pure Reference Document.
- Organisation: This is currently planned for later this year in our 5.18 release of Pure. For more details, see "10.5 Configuration and branding" in the Elsevier Pure Reference Document.
- Infrastructures: This is currently planned for later this year in our 5.18 release of Pure. For more details, see "10.5 Configuration and branding" in the Elsevier Pure Reference Document.

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l. The Portal must support individual CVs on researcher profile pages

Text field

This is supported by the Pure Portal. Using the additional CV Module, information from a researcher's Personal Profile page can be compiled into a public CV for display on the Pure Portal. For more details, see "10.1.1 Researchers in the Pure Portal" in the Elsevier Pure Reference Document.

---

m. The Portal must support information on how cookies are handled

Text field

This is supported by the Pure Portal. A link in the footer of the Portal directs visitors to further information on cookies. For more details, see "10.4 Usage and metrics" in the Elsevier Pure Reference Document.

---

n. It must be possible to track the use of the portal, e.g. with Google Analytics

Text field

This is supported by the Pure Portal via its ability to connect with Google Analytics. For more details, see "10.4 Usage and metrics" in the Elsevier Pure Reference Document.

o. Search engine optimization of the Portal according to latest technical requirements must be actively pursued by the supplier

Text field

This is supported by the Pure Portal, which is optimized for search engines, including Google Scholar, and provides a high level of discoverability. For more details, see "10.3 Discovering content" in the Elsevier Pure Reference Document.

p. The portal must comply with web accessibility standards according to European Accessibility Directive at the latest time end of 2020

Text field

The Pure Portal is aligned with the European Accessibility Directive. We are currently undertaking a full review and refresh of our accessibility compliance, which will take us to achieving WCAG 2.1 AA - the generally accepted “gold standard” of web accessibility. This work is scheduled to be completed in February 2021. Our accessibility statement is modelled directly so as to be compliant with the Commission Implementing Decision (EU) 2018/1523 template.

Furthermore, we conduct annual accessibility reviews on our portals and publish the resulting report openly, available directly from our Portals.

2.6 Usability

The system must met the following requirements on usability. Confirm, under each question, that the requirement is met and refer to where in the enclosed documentation it appears or provide an explanation.

a. The system’s web interfaces (backend and Portal) must run well on modern web browsers e.g. Microsoft Edge, Safari, Chrome and Firefox

Text field

Both the interfaces of the Pure backend and Pure Portal are supported on modern web browsers. For more details on the browsers we support, see "14. Usability and display" in the Elsevier Pure Reference Document.

b. The system's web interfaces (backend and portal) must be responsive, i.e. its content and interaction adapt to different screen sizes (phone, tablet, desktop)

Text field

The Pure Portal is developed using responsive design methodologies and adapts to tablet and smartphone screen sizes, which is what most users see. The Pure backend is not responsive, but we are expecting that this will be part of our future roadmap. For more details, see "14. Usability and display" in the Elsevier Pure Reference Document.

---

c. Basic formatting functionalities (bold, italic etc) must be possible in major descriptive fields and symbols (e.g. mathematical symbols) supported

Text field

Basic formatting functionalities (bold and italic), and symbols (e.g. mathematical symbols) are supported by the title, sub-title and abstract fields on a Research Output in Pure. For more details, see "14. Usability and display" in the Elsevier Pure Reference Document.

2.7 Copy of data

It must be possible to create a copy of all HKR-proprietary data recorded (imported or registered) in the system in a standardized and fully documented format.

a. Is the requirement met?

Yes/No. Yes is required

Answer

Yes

---

b. Describe in what format and how this is done

Text field

This is possible in Pure using the Web Service API, which allows extraction of both metadata and file data to both XML and JSON format. For more details, see "4.4 Web Services" in the Elsevier Pure Reference Document.
