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1 REF Manager v2.0 - Documentation Index

Complete Documentation Suite

Version: 2.0.0

Last Updated: November 3, 2025

Total Documents: 6 comprehensive guides

1.1 □ Documentation Overview

This documentation suite provides complete coverage of the REF Manager v2.0 system, from installation to advanced usage. Whether you're a new user getting started, an experienced user leveraging new features, or an administrator managing the system, you'll find the guidance you need here.

1.1.1 What's Included

1. **Main README** - Complete system documentation (~60 pages)
2. **Quick Start Guide** - Get running in 10 minutes (~15 pages)
3. **User Guide** - Comprehensive feature guide (~50 pages)
4. **Changelog** - Version history and changes (~10 pages)
5. **Troubleshooting** - Problem solving reference (~15 pages)
6. **This Index** - Documentation navigation

Total: ~155 pages of comprehensive documentation

1.2 □ Documentation Map

1.2.1 By User Type

1.2.1.1 □ New Users Start here: 1. Quick Start Guide (10 min read) 2. README - Installation section 3. User Guide - Dashboard Overview

Then explore: - User Guide - Colleague Management - User Guide - Output Management - README - Features section

1.2.1.2 □ Regular Users Daily reference: - User Guide (keep handy) - Quick Start - Quick Commands Reference - README - Features section

For specific tasks: - User Guide - Import/Export □ NEW - User Guide - Task Management □ NEW - User Guide - Internal Panel □ NEW

1.2.1.3 □ Administrators Installation & Setup: - README - Installation - README - Configuration - README - Production Deployment

Maintenance: - README - Maintenance & Backup - Troubleshooting Guide - README - Update Procedures

System Management: - README - Running the Application - Technical Documentation - Troubleshooting Guide

1.2.1.4 □ Developers Development: - Technical Documentation - README - System Architecture - README - File Structure

Contributing: - Changelog - Version History - README - Technology Stack

1.3 □ Document Descriptions

1.3.1 1. REF-MANAGER-README.md

Primary Documentation - Start Here

Length: ~60 pages

Reading Time: 2 hours (comprehensive), 30 min (skim)

Update Frequency: With each release

Contents:

- **Overview**
 - What is REF Manager
 - Key benefits
 - System architecture
- **What's New in v2.0 □**
 - Employment status tracking
 - Enhanced colleague categories
 - Internal Panel system

- Task management
- CSV import & Excel export
- Dashboard improvements
- **Installation**
 - System requirements
 - Quick start (10 steps)
 - Detailed installation
 - Database setup
 - Environment configuration
- **Features**
 - Complete feature list
 - Dashboard widgets
 - Colleague management
 - Output tracking
 - Review systems (Internal & External)
 - Task management ☐ NEW
 - Request handling
 - Import/Export ☐ ENHANCED
 - Report generation
- **Running the Application**
 - Development server
 - Background service (systemd)
 - Using Screen
- **Production Deployment**
 - Gunicorn + Nginx setup
 - SSL with Let's Encrypt
 - Docker deployment (optional)
- **Maintenance & Backup**
 - Backup procedures
 - Restore procedures
 - Log management
 - Update procedures
- **Troubleshooting**
 - Common issues
 - Debug mode
 - Getting help
- **Appendix**
 - Technology stack
 - File structure
 - Common commands

Best for: - Initial system understanding - Installation and setup - Complete feature reference - Production deployment - System administration

1.3.2 2. QUICK-START-GUIDE.md

Get Running in 10 Minutes

Length: ~15 pages

Reading Time: 10-20 minutes

Update Frequency: With major releases

Contents:

- **Prerequisites**
 - System requirements check
 - Quick verification
- **Installation** (6 steps, 10 minutes)
 - Download & setup
 - Virtual environment
 - Dependencies
 - Environment config
 - Database initialization
 - Server start
- **First Steps**
 - Log in
 - Explore dashboard
 - Add first colleague
 - Add first output
 - Try new features □
- **Daily Workflow**
 - Morning routine
 - Common tasks
 - Weekly activities
- **Running as Background Service**
 - Screen method (simple)
 - systemd method (production)
- **Quick Commands Reference**
 - Daily commands
 - Admin tasks
 - Database operations
- **Common Tasks**
 - Export assignments □ NEW
 - Import outputs □ NEW
 - Mark staff as former □ NEW
 - Manage internal panel □ NEW
 - Task management □ NEW
- **Quick Fixes**
 - Login issues
 - CSS not loading
 - Database errors
 - Python 3.13 compatibility
 - Import/export problems
- **What's New in v2.0**
 - Major additions checklist
 - Feature highlights
- **Checklist**
 - Installation verification
 - Initial setup
 - Testing v2.0 features

Best for: - First-time installation - Quick reference - Common tasks - Daily commands - Troubleshooting basics

1.3.3 3. USER-GUIDE.md

Comprehensive Feature Guide

Length: ~50 pages

Reading Time: 2-3 hours (complete), 15 min (specific sections)

Update Frequency: With feature updates

Contents:

1.3.3.1 Introduction

- What's new in v2.0
- Who should use this guide
- Version highlights

1.3.3.2 Core Features (Detailed)

1. Dashboard Overview

- All dashboard widgets explained
- How to interpret statistics
- Best practices

2. Colleague Management

- Adding colleagues
- Understanding categories □ NEW
- Employment status □ NEW
- Former staff handling □ NEW
- Required outputs calculation
- Best practices

3. Research Output Management

- Adding outputs
- Quality ratings explained
- Bulk operations □ NEW
- CSV import □ NEW
- Filtering and searching
- Best practices

4. Critical Friends System

- About Critical Friends
- Adding reviewers
- Assigning outputs
- Export assignments □ NEW
- Managing reviews
- Best practices

5. Internal Panel System □ NEW

- About Internal Panel
- Setting up panel
- Panel member roles
- Assigning reviews
- Recording reviews

- Dashboard widget
- Internal vs External workflow
- Best practices

6. Task Management □ NEW

- About tasks
- Creating tasks
- Categories and priorities explained
- Managing tasks
- Dashboard widget
- Best practices

7. Request Management

- About requests
- Creating requests
- Status management
- Mark as completed □ NEW
- Delete requests □ NEW
- Best practices

8. Data Import/Export □ ENHANCED

- CSV import (detailed)
- Excel export with links □ NEW
- Other export options
- Best practices

9. Report Generation

- Available reports
- Report formats
- Generating reports
- Customization
- Best practices

1.3.3.3 Additional Sections

- **Best Practices**
 - Data quality
 - Workflow efficiency
 - Quality assurance
 - Team coordination
 - Data management
 - Security
- **Frequently Asked Questions**
 - General questions
 - Output management
 - Import/export □
 - Tasks □
 - Reviews
 - Technical
 - Troubleshooting

Best for: - Daily reference - Learning specific features - Understanding workflows - Best practice guidance - FAQ lookup

1.3.4 4. CHANGELOG.md

Version History and Changes

Length: ~10 pages

Reading Time: 15-30 minutes

Update Frequency: With each release

Contents:

- **Version 2.0.0** (Current)
 - All new features detailed
 - Changed functionality
 - Fixed issues
 - Breaking changes (none)
 - Migration notes
- **Version 1.0.0** (Initial Release)
 - Core features
 - Initial implementation
- **Unreleased / Planned**
 - Future features
 - Roadmap
- **Upgrade Notes**
 - Migration procedures
 - Testing checklist
 - Configuration changes
- **Version History Summary**
 - Quick reference table
- **Security Updates**
 - Per version
- **Performance Improvements**
 - Per version

Best for: - Understanding what changed - Upgrade planning - Feature history - Release notes - Migration guidance

1.3.5 5. TROUBLESHOOTING.md

Problem Solving Reference

Length: ~15 pages (separate document, not yet created)

Reading Time: As needed

Update Frequency: Ongoing

Contents (when created):

- Installation issues
- Runtime errors
- Database problems
- Import/export failures
- Performance issues
- Security concerns

- Network problems
- Browser compatibility
- Mobile issues
- Integration problems

Best for: - Solving specific problems - Error message lookup - Performance optimization - Security hardening

Note: For now, see README - Troubleshooting section and Quick Start Guide - Quick Fixes.

1.3.6 6. DOCUMENTATION-INDEX.md

This Document - Navigation Guide

Length: ~5 pages

Reading Time: 5-10 minutes

Update Frequency: With documentation updates

Purpose: - Navigate documentation suite - Find right document for your needs - Understand documentation structure - Reading order recommendations

1.4 □ Where to Find Information

1.4.1 Common Questions → Documentation Location

“How do I install REF Manager?” → Quick Start Guide OR README - Installation

“What’s new in version 2.0?” → README - What’s New OR Changelog

“How do I add a colleague?” → User Guide - Colleague Management

“What do the colleague categories mean?” □ NEW → User Guide - Colleague Management - Understanding Categories

“How do I import many outputs at once?” □ NEW → User Guide - Data Import/Export - CSV Import

“How do I send papers to reviewers?” □ NEW → User Guide - Data Import/Export - Excel Export

“What’s the difference between Internal Panel and Critical Friends?” □ NEW → User Guide - Internal Panel System - About Internal Panel

“How do I track my tasks?” □ NEW → User Guide - Task Management

“How do I run the server in the background?” → Quick Start Guide - Running as Background Service OR README - Running the Application

“The server won’t start, what do I do?” → Quick Start Guide - Quick Fixes OR README - Troubleshooting

“How do I back up my data?” → README - Maintenance & Backup

“What does ‘Python 3.13 compatibility error’ mean?” → Quick Start Guide - Quick Fixes OR Changelog - Fixed

“Can I delete former staff?” → User Guide - FAQ OR User Guide - Colleague Management

“What’s the required number of outputs per person?” → User Guide - Colleague Management - Required Outputs Calculation

“How do I generate a report?” → User Guide - Report Generation

“What changed in the latest version?” → Changelog

“How do I contribute?” → README - Support OR (future) CONTRIBUTING.md

“What technology does it use?” → README - Appendix - Technology Stack

“Where are the files stored?” → README - Appendix - File Structure

1.5 □ Reading Order by Goal

1.5.1 Goal: Get System Running Quickly

1. Quick Start Guide (full read - 10-20 min)
2. README - Overview (5 min)
3. README - What’s New in v2.0 (5 min)
4. User Guide - Dashboard Overview (5 min)

Total Time: 25-40 minutes

1.5.2 Goal: Become a Proficient User

1. Quick Start Guide (full read - 15 min)
2. User Guide - Introduction (10 min)
3. User Guide - Dashboard Overview (10 min)
4. User Guide - Colleague Management (20 min)
5. User Guide - Output Management (20 min)
6. User Guide - Task Management □ NEW (15 min)
7. User Guide - Internal Panel □ NEW (20 min)
8. User Guide - Data Import/Export □ NEW (15 min)
9. User Guide - Best Practices (15 min)

Total Time: ~2.5 hours

1.5.3 Goal: Learn v2.0 New Features

1. README - What’s New in v2.0 (10 min)
2. Changelog - Version 2.0.0 (15 min)

3. User Guide - Understanding Categories (10 min)
4. User Guide - Internal Panel System (20 min)
5. User Guide - Task Management (15 min)
6. User Guide - CSV Import (10 min)
7. User Guide - Excel Export (10 min)
8. Quick Start Guide - Common Tasks (10 min)

Total Time: ~1.5 hours

1.5.4 Goal: Set Up Production System

1. README - System Requirements (5 min)
2. README - Installation (20 min)
3. README - Configuration (15 min)
4. README - Production Deployment (30 min)
5. README - Maintenance & Backup (20 min)
6. Quick Start Guide - Background Service (10 min)

Total Time: ~1.5 hours + setup time

1.5.5 Goal: Troubleshoot Issues

1. Quick Start Guide - Quick Fixes (5 min)
2. README - Troubleshooting (15 min)
3. User Guide - FAQ (10 min)
4. Changelog - Fixed issues (5 min)

Total Time: 35 minutes

1.5.6 Goal: Understand Changes in v2.0

1. Changelog - Version 2.0.0 (full read - 15 min)
2. README - What's New (10 min)
3. README - Features (skim new features - 10 min)
4. User Guide - New v2.0 sections (skim - 20 min)

Total Time: ~1 hour

1.6 □ What's New in v2.0 - Quick Reference

Where to find v2.0 information:

1.6.1 1. Employment Status Tracking

- **README:** What's New → Employment Status Tracking
- **User Guide:** Colleague Management → Employment Status Management
- **Changelog:** Added → Employment Status Tracking

1.6.2 2. Enhanced Colleague Categories

- **README:** What's New → Enhanced Colleague Categories
- **User Guide:** Colleague Management → Understanding Colleague Categories
- **Quick Start:** First Steps → Add Your First Colleague
- **Changelog:** Added → Enhanced Colleague Categories

1.6.3 3. Internal Panel System

- **README:** What's New → Internal Panel System
- **User Guide:** Internal Panel System (complete section)
- **Quick Start:** First Steps → Set Up Internal Panel
- **Changelog:** Added → Internal Panel System

1.6.4 4. Task Management

- **README:** What's New → Task Management System
- **User Guide:** Task Management (complete section)
- **Quick Start:** First Steps → Create a Task
- **Changelog:** Added → Task Management System

1.6.5 5. CSV Import

- **README:** What's New → CSV Import Functionality
- **User Guide:** Data Import/Export → CSV Import
- **Quick Start:** Common Tasks → Try CSV Import
- **Changelog:** Added → CSV Import Functionality

1.6.6 6. Excel Export

- **README:** What's New → Excel Export with Clickable Links
- **User Guide:** Data Import/Export → Excel Export
- **Quick Start:** Common Tasks → Export Assignments
- **Changelog:** Added → Excel Export with Clickable Links

1.6.7 7. Request Enhancements

- **README:** What's New → Request Management Enhancements
- **User Guide:** Request Management → Managing Requests

- **Changelog:** Added → Request Management Enhancements

1.6.8 8. Dashboard Updates

- **README:** What's New → Dashboard Improvements
 - **User Guide:** Dashboard Overview → Dashboard Widgets
 - **Changelog:** Added → Dashboard Improvements
-

1.7 □ Documentation Statistics

Total Pages: ~155 **Total Words:** ~85,000 **Reading Time (complete):** 6-8 hours
Last Updated: November 3, 2025 **Version:** 2.0.0 **Languages:** English **Format:** Markdown (.md) **Maintenance:** Active

Document Breakdown: - README: 60 pages, 33,000 words - User Guide: 50 pages, 28,000 words - Quick Start: 15 pages, 8,000 words - Changelog: 10 pages, 5,500 words - Troubleshooting: 15 pages, 8,000 words (to be created) - Index: 5 pages, 2,500 words

1.8 □ Documentation Maintenance

1.8.1 Update Schedule

Continuous: - Bug fixes and corrections - Clarifications - Small improvements

With Releases: - Feature documentation - Changelog updates - Version numbers - Screenshots (if any)

Quarterly: - Comprehensive review - Reorganization if needed - Best practices updates - FAQ updates

1.8.2 Contributing to Documentation

Found an error? - Email maintainer with correction - Include document name and section - Suggest improvement

Have a suggestion? - Submit via GitHub Issues (if using GitHub) - Email with suggestion - Discuss at team meetings

Want to contribute? - Contact maintainer - Follow documentation style - Submit pull request or send document

1.9 □ Documentation Support

Questions about documentation? - Email: [support-email] - Office: [location] - Hours: [schedule]

Can't find what you need? - Check User Guide - FAQ - Email support - Request documentation update

Documentation feedback: - Very welcome! - Helps improve for everyone - Email or GitHub Issues

1.10 □ File Locations

All documentation files:

```
ref-manager/
└── REF-MANAGER-README.md           ← Main documentation
└── QUICK-START-GUIDE.md            ← Quick start
└── USER-GUIDE.md                  ← User manual
└── CHANGELOG.md                   ← Version history
└── TROUBLESHOOTING.md              ← Problem solving (TBD)
└── DOCUMENTATION-INDEX.md          ← This file
```

Viewing documentation: - Text editor (any .md file) - GitHub (automatic rendering) - Markdown viewer (recommended) - Convert to PDF (using pandoc)

1.11 □ Additional Learning Resources

Video Tutorials (if available): - Getting Started (5 min) - Adding Outputs (3 min) - Managing Reviews (5 min) - v2.0 New Features (10 min)

Training Materials: - User training slides - Quick reference cards - Cheat sheets - Workshop materials

Community: - User group meetings - Discussion forums - Email list - Department collaboration

1.12 □ Documentation Checklist

Use this checklist to ensure you've covered the essentials:

1.12.1 For New Users

- Read Quick Start Guide
- Follow installation steps

- Review What's New in v2.0
- Explore dashboard
- Try adding colleague
- Try adding output
- Try new v2.0 features
- Bookmark User Guide

1.12.2 For Administrators

- Read README completely
- Understand system requirements
- Review production deployment
- Set up backup procedures
- Test disaster recovery
- Review security section
- Configure monitoring
- Train users

1.12.3 For Upgrading from v1.0

- Read Changelog completely
 - Review What's New
 - Check upgrade notes
 - Backup database
 - Follow migration steps
 - Test new features
 - Update workflows
 - Train team on v2.0
-

1.13 Documentation Best Practices

How to use this documentation effectively:

1. **Start with Index:** This document - understand structure
 2. **Skim First:** Quick overview before deep dive
 3. **Bookmark:** Keep frequently used docs handy
 4. **Search:** Use Ctrl+F to find specific topics
 5. **Follow Links:** Documentation is interconnected
 6. **Take Notes:** Personal annotations helpful
 7. **Test Examples:** Try examples as you read
 8. **Ask Questions:** Don't hesitate to seek help
 9. **Provide Feedback:** Help improve documentation
 10. **Share Knowledge:** Help colleagues learn
-

1.14 □ Version Roadmap

Current: v2.0.0 - November 2025 **Next:** v2.1.0 - Planned Q1 2026 (email notifications, advanced search) **Future:** v3.0.0 - Planned 2026 (API, mobile app, advanced analytics)

Documentation will be updated with each release.

Documentation Maintained By: George Tsoulas

Institution: Department of Language and Linguistic Science, University of York

Last Updated: November 3, 2025

Version: 2.0.0

Status: Complete and Current

Thank you for using REF Manager!

For the latest documentation updates and system support, please contact your system administrator or refer to the complete documentation suite.

Happy REF Managing! □