Contents

1 Changelog

All notable changes to REF Manager will be documented in this file.

The format is based on Keep a Changelog, and this project adheres to Semantic Versioning.

1.1 [2.0.0] - 2025-11-03

1.1.1 Added

1.1.1.1 Employment Status Tracking

- Added `employment_status` field to Colleague model (current/former)
- Added `employment_end_date` field to track when employment ended
- Filtering in forms to show only current employees in dropdowns
- Badge display for employment status in colleague lists
- "Mark as former" functionality with confirmation page
- Employment status statistics in dashboard
- Historical data preservation for former staff

1.1.1.2 Enhanced Colleague Categories

- Added `colleague_category` field with 9 distinct types:
  - Independent Researcher
  - **Non-Independent Researcher** (for post-docs) ⬅ KEY FEATURE
  - Post-Doctoral Researcher
  - Research Assistant
  - Academic Staff
  - Support Staff
  - Current Employee
  - Former Employee
  - Co-author (External)
- Category counts displayed on colleague list page
- Filtering by category in colleague views
- Category-specific badges and visual indicators
- Auto-categorization of external co-authors in CSV import

1.1.1.3 Internal Panel System ⬅ MAJOR FEATURE

- New `InternalPanelMember` model for internal reviewers
- New `InternalPanelAssignment` model for internal evaluations
- Four panel member roles: Chair, Member, Specialist, External Liaison
- Complete CRUD operations for panel members
- Assignment tracking with four status types (assigned, in_progress, completed, deferred)
- Rating recommendations aligned with REF quality ratings (4, *3*, 2, *1*)
- Dashboard widget showing internal panel statistics:
  - Total panel members
  - Active assignments
  - Completed reviews
  - Quality rating distribution
  - Workload distribution
- Separate from Critical Friends (external) system
- Internal panel views, forms, and templates
- Expertise area tracking for panel members
- Availability toggle for panel members

1.1.1.4 Task Management System □ MAJOR FEATURE

- New Task model for general task tracking
- Seven task categories:
  - Administrative
  - Submission
  - Review
  - Meeting
  - Documentation
  - Deadline
  - Other
- Four priority levels: Low, Medium, High, Urgent
- Four status types: Pending, In Progress, Completed, Cancelled
- User assignment and creation tracking
- Due date and start date management
- Task dashboard widget showing:
  - Urgent tasks (due within 7 days)
  - Overdue tasks
  - Tasks by status
  - Tasks by priority
- Complete task list and detail views
- Task creation, editing, and completion functionality
- Filter and search capabilities
- Quick task completion from list view

1.1.1.5 CSV Import Functionality □ MAJOR FEATURE

- Bulk import for research outputs
- Bulk import for colleague data
- Upload interface with file validation
- CSV template download
- Comprehensive data validation:
  - Required field checking
  - Date format validation
  - Quality rating validation
  - Email matching to colleagues
- Duplicate detection by title and DOI
- Automatic linking to existing colleagues
- Auto-categorization of external co-authors
- Import summary and error reporting
- Batch processing support

1.1.1.6 Excel Export with Clickable Links □ MAJOR FEATURE

- Export review assignments to Excel
- Clickable hyperlinks to paper PDF files
- Color-coded formatting:
  - Light blue background for Internal Panel assignments
  - Light yellow background for Critical Friends assignments
- Professional Excel formatting:
  - Frozen header row

– Bold headers
 – Adjusted column widths
 – Border styling
- Comprehensive filtering options:
 – By reviewer type (Internal Panel / Critical Friends)
 – By specific reviewer
 – By output author
 – By assignment status
- Complete assignment information:
 – Reviewer name and email
 – Output title and author
 – Quality rating
 – Review status
 – Due date and priority
 – Direct PDF links
 – Notes
- Automatic filename generation with timestamp
- CSV export alternative also available

1.1.1.7   Request Management Enhancements

- "Mark as completed" functionality with confirmation page
- Completion timestamp tracking
- "Delete request" functionality with warning confirmation
- Visual status indicators with badges
- Enhanced action buttons in list view:
 – View (blue)
 – Edit (yellow)
 – Complete (green) - hidden for already completed requests
 – Delete (red)
- Success messages after completion or deletion
- Conditional button display based on request status

1.1.1.8   Dashboard Improvements

- New Internal Panel Statistics widget showing:
 – Panel member count by role
 – Active assignments count
 – Completed reviews count
 – Average quality rating from internal reviews
 – Workload distribution
- New Task Overview widget showing:
 – Urgent tasks count
 – Overdue tasks count
 – Tasks by status breakdown
 – Tasks by priority breakdown
- Employment status distribution in Staff Summary
- Category breakdown in colleague statistics
- Enhanced Recent Activity section

1.1.2 Changed

- Enhanced colleague model with new status and category fields
- Updated colleague list view with category filters and statistics
- Improved colleague detail view with employment status display
- Updated dashboard to show Internal Panel and Task statistics
- Enhanced colleague forms with category and status dropdowns
- Modified dropdown filtering to respect employment status (current only)
- Updated colleague queryset filtering in assignment forms
- Improved admin interface with new filters for status and category
- Updated URL patterns for new views and features
- Enhanced navigation menu with new sections

1.1.3 Fixed

- **Category field naming issue**: Resolved inconsistency between hyphenated ("non-independent") and underscore ("non_independent") versions in database
- **Python 3.13 compatibility**: Fixed Decimal * float multiplication error in required_outputs calculation by converting Decimal to float
- **Template syntax errors**: Fixed unbalanced if/endif blocks in request templates
- **URL routing errors**: Fixed missing URL patterns for request_detail, request_complete, request_delete
- **Form field references**: Fixed incorrect field path references in assignment forms (e.g., colleague__user__last_name)
- **Static file issues**: Resolved Django admin panel styling problems with collectstatic
- **Dropdown filtering**: Fixed filtering to show only current employees in assignment forms

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1.2 [1.0.0] - 2025-10-21

1.2.1 Added

1.2.1.1 Initial Release

- Complete REF submission management system
- Django 4.2+ based web application
- SQLite database (development) with PostgreSQL support (production)
- User authentication and authorization
- Multi-user access with permissions

1.2.1.2 Core Features

- **Output Management**:
  – Add, edit, view, delete research outputs

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- Multiple publication types (Article, Book, Chapter, etc.)
  - Quality rating system (4, *3*, 2, *1*, Unclassified)
  - PDF file upload for publications
  - DOI and URL linking
  - REF eligibility tracking
  - Unit of Assessment assignment
  - Keywords and abstracts
  - Submission notes
- **Colleague Management**:
  - Staff information tracking
  - FTE (Full-Time Equivalent) management
  - Unit of Assessment assignment
  - Required output calculation
  - Output count tracking
  - Contact information
  - Research interests
- **Critical Friends System**:
  - External reviewer management
  - Institution and expertise tracking
  - Assignment to outputs
  - Review status tracking
  - Due dates and priorities
  - Rating and feedback recording
  - Availability management
  - Completion tracking
- **Request Management**:
  - REF-related request tracking
  - Multiple request types
  - Priority levels
  - Status tracking (Pending, In Progress)
  - Due dates
  - Output linking
  - Assignment to colleagues
  - Request history
- **Dashboard**:
  - Submission statistics
  - Quality profile visualization
  - Staff summary
  - Review progress tracking
  - Recent activity feed
  - Quick access to common tasks
- **Report Generation**:
  - LaTeX template-based reports
  - Multiple report types:
    * Submission Overview
    * Quality Profile Analysis
    * Staff Progress Report
    * Review Status Report
    * Comprehensive Report (all combined)
  - Three output formats:
    * LaTeX source (.tex)

* ∗ Article format
* ∗ Report format
* ∗ Beamer presentation
  - – Professional formatting with charts
  - – Executive summaries
  - – Detailed analysis sections

1.2.1.3 Administrative Features

- Django admin panel integration
- User management
- Bulk operations
- Data filtering and search
- Advanced querying
- System configuration

1.2.1.4 Technical Features

- Responsive Bootstrap 4 interface
- AJAX-based interactions
- Form validation
- File upload handling
- PDF viewing
- DOI linking
- Search and filter functionality
- Pagination
- Crispy forms integration

1.3 [Unreleased]

1.3.1 Planned Features

1.3.1.1 High Priority

- Email notification system for:
  - Task reminders
  - Review due dates
  - Request updates
  - System announcements
- Advanced search across all entities
- Export to Word/DOCX format
- API endpoints for external integrations
- Mobile app or responsive mobile views
- Batch operations for outputs and assignments

1.3.1.2 Medium Priority

- Advanced analytics and visualizations

- Customizable dashboard widgets
- Team collaboration features
- Version control for outputs
- Comment system for discussions
- File attachment support for requests
- Integration with institutional repositories
- Impact case study tracking
- Environment statement management

1.3.1.3 Low Priority

- Machine learning for quality prediction
- Automated reviewer matching
- Citation tracking integration
- Grant linkage
- Conference presentation tracking
- Teaching exemption calculation
- Workload modeling

1.4 Version History Summary

Version	Date	Description
2.0.0	2025-11-03	Major update with Internal Panel, Tasks, CSV Import, Excel Export, Enhanced Categories
1.0.0	2025-10-21	Initial release with core REF management features

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1.5 Upgrade Notes

1.5.1 Upgrading from 1.0.0 to 2.0.0

Database Migrations Required: Yes

Steps:

1. **Backup database**:

   ```
   cp db.sqlite3 db.sqlite3.backup.$(date +%Y%m%d)
   ```

2. **Pull/download new code**:

   ```
   git pull origin main
   # or download and extract new version
   ```

3. **Update dependencies**:

```
pip install -r requirements.txt
```

4. **Run migrations**:

```
python manage.py makemigrations
python manage.py migrate
```

5. **Collect static files**:

```
python manage.py collectstatic --noinput
```

6. **Restart server**:

```
# If using systemd:
sudo systemctl restart ref-manager


# If using development server:
# Press Ctrl+C and restart
python manage.py runserver
```

Data Migration Notes:

- **Colleague Categories**: Existing colleagues will have `colleague_category` set to None. Update manually or via admin panel.
- **Employment Status**: Existing colleagues will default to "current". Update as needed.
- **No data loss**: All existing data preserved.
- **New tables created**: Task, InternalPanelMember, InternalPanelAssignment.
- **Backward compatible**: Old data works with new system.

Configuration Changes:

No changes to `.env` required, but you may want to add:

```
# Task Settings (optional)
DEFAULT_TASK_PRIORITY=medium
TASK_OVERDUE_THRESHOLD_DAYS=7


# Excel Export Settings (optional)
MAX_EXPORT_ROWS=10000
```

Testing After Upgrade:

1. ☐ Log in successfully
2. ☐ View dashboard (new widgets should appear)
3. ☐ Create a colleague with category
4. ☐ Create a task
5. ☐ Create an internal panel member
6. ☐ Try CSV import
7. ☐ Try Excel export
8. ☐ Test existing features still work

1.6 Breaking Changes

1.6.1 Version 2.0.0

None - v2.0.0 is fully backward compatible with v1.0.0.

All existing functionality preserved. New features are additions only.

1.7 Security Updates

1.7.1 Version 2.0.0

- Updated Django to 4.2+ (latest security patches)
- Enhanced form validation
- Improved file upload security
- CSV upload validation and sanitization

1.7.2 Version 1.0.0

- Initial security implementation
- Django built-in authentication
- CSRF protection
- SQL injection prevention
- XSS protection

1.8 Performance Improvements

1.8.1 Version 2.0.0

- Optimized database queries with select_related() and prefetch_related()
- Improved dashboard loading with query optimization
- Better pagination for large datasets
- Efficient Excel export with streaming
- CSV import batch processing

1.8.2 Version 1.0.0

- Initial performance optimization
- Database indexing
- Query optimization
- Static file caching

1.9 Documentation Updates

1.9.1 Version 2.0.0

- Complete documentation rewrite for v2.0
- Updated README with new features
- Enhanced Quick Start Guide
- Comprehensive User Guide covering all v2.0 features
- Updated Technical Documentation
- Enhanced Troubleshooting Guide
- This Changelog

1.9.2 Version 1.0.0

- Initial documentation suite
- Installation guide
- User manual
- Technical reference

1.10 Acknowledgments

Version 2.0.0 Contributors: - George Tsoulas - Feature design and testing - Department of Language and Linguistic Science staff - User feedback - Claude (Anthropic) - Development assistance

Version 1.0.0 Contributors: - George Tsoulas - Initial concept and requirements - Department staff - Testing and feedback

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1.11 Support

For questions about changes in specific versions: - Email: [support-email] - Documentation: Complete docs in project folder - GitHub Issues: [if using GitHub]

Note: This changelog follows Keep a Changelog principles and Semantic Versioning.

Version Format: MAJOR.MINOR.PATCH - MAJOR: Incompatible API changes - MINOR: New functionality (backward compatible) - PATCH: Bug fixes (backward compatible)

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