REF-Manager

Changelog

Version History

University of York

November 2024

Contents

1   Version 3.0.0 — November 2024

Major Release — Complete Feature Overhaul
     This release introduces comprehensive role-based access control, risk assessment framework, portfolio optimisation, and multi-dimensional quality ratings.

1.1   Added

1.1.1   Role-Based Access Control

- Four user roles: Administrator, Observer, Internal Panel, Colleague

- Multi-role support with combined permissions

- 13+ granular permissions per role

- Rating finalisation system

- Django admin integration

- Template tags for permission-based rendering

- Management commands: `setup_roles`, `assign_roles`

1.1.2   Risk Assessment Framework

- Content risk scoring (0-1 scale)

- Timeline risk based on publication status

- Open Access compliance tracking

- Panel alignment assessment

- Venue prestige scoring

- Configurable risk weights

- Risk dashboard with visualisations

1.1.3   Portfolio Optimisation

- REFSubmission model for scenario planning

- Portfolio quality score (GPA-style)

- Portfolio risk score

- Representativeness metrics

- Equality and gender balance scores

- ECR representation tracking

1.1.4 Multi-Dimensional Quality Ratings

- Separate Internal Panel rating field

- Separate Critical Friend rating field

- Self-Assessment rating for authors

- Automatic average calculation

- Specialist/Non-Specialist classification

1.1.5 Task Management System

- Task creation with workflow

- Categories and priorities

- Due date management

- Overdue alerts

1.2 Changed

- Dashboard updated for decimal average ratings

- Colleague model: added employment status tracking

- Output model: comprehensive risk fields added

- Expanded output status options

- Improved filtering throughout

2 Version 2.1.0 — November 2024

2.1 Added

- Self-evaluation ratings for outputs

- Specialist/Non-Specialist reviewer classification

- Enhanced dashboard statistics

2.2 Fixed

- Colleague category filter issues

- Template rendering bugs

3 Version 2.0.0 — November 2024

3.1 Added

- Internal Panel management

- Critical Friend assignment system

- Employment status tracking

- Colleague category system

- BibTeX import

- CSV import with duplicate detection

4   Version 1.0.0 — October 2024

4.1   Initial Release

- Colleague management

- Research output tracking

- Critical Friend management

- Dashboard with statistics

- Excel export

- LaTeX report generation

- User authentication

5   Upgrade Guide

5.1   Upgrading to 3.0.0

1. Backup your database

2. Update code from repository

3. Install new dependencies: `pip install -r requirements.txt`

4. Run migrations: `python manage.py migrate`

5. Set up roles: `python manage.py setup_roles -create-profiles -superusers-admin`

6. Verify user roles and permissions

5.2   Breaking Changes in 3.0

- UserProfile model required for all users

- Role system replaces simple is_staff checks

- New quality rating fields (internal, external, self)

- Risk fields on Output model