

REF-Manager

Quick Start Guide

Get Running in 15 Minutes

Version 4.0.0

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1 Prerequisites

Before starting, ensure you have:

- Python 3.10 or higher installed
- Git installed
- Terminal/command line access

2 Step 1: Download and Setup (5 minutes)

```
# Clone the repository
git clone https://github.com/gtsoulas/ref-manager.git
cd ref-manager

# Create virtual environment
python -m venv venv

# Activate it
source venv/bin/activate    # Linux/Mac

# Install dependencies
pip install -r requirements.txt
pip install requests
```

3 Step 2: Configure (2 minutes)

```
# Copy example configuration
cp env.example .env
```

For development, the defaults work fine.

4 Step 3: Initialise Database (3 minutes)

```
# Create database tables
python manage.py migrate

# Create admin account
python manage.py createsuperuser

# Setup user roles
python manage.py setup_roles --create-profiles --superusers-admin
```

5 Step 4: Start the Server (1 minute)

```
python manage.py runserver
```

Visit: <http://localhost:8000>

6 Step 5: First Steps (4 minutes)

6.1 Add an Output with DOI Auto-Fetch

1. Navigate to **Outputs** → **Add Output**
2. Paste a DOI (e.g., 10.1038/nature12373)
3. Click **Auto-Fill**
4. Review populated fields
5. Select the Colleague
6. Add O/S/R ratings (0.00-4.00)
7. Click **Save**

7 O/S/R Rating Scale

Score	Star	Description
3.50 - 4.00	4★	World-leading
2.50 - 3.49	3★	Internationally excellent
1.50 - 2.49	2★	Internationally recognised
0.50 - 1.49	1★	Nationally recognised
0.00 - 0.49	U	Unclassified

8 What's Next?

- **User Guide:** Complete feature documentation
- **Technical Documentation:** Server deployment
- **Troubleshooting:** Common issues

9 Quick Commands

Task	Command
Start server	<code>python manage.py runserver</code>
Create migration	<code>python manage.py makemigrations</code>
Apply migrations	<code>python manage.py migrate</code>
Collect static	<code>python manage.py collectstatic</code>

10 Need Help?

- Email: george.tsoulas@york.ac.uk
- GitHub: <https://github.com/gtsoulas/ref-manager>