

REF-Manager

User Guide

Version 4.0.0

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Contents

1 Getting Started

1.1 Logging In

1. Navigate to your REF-Manager URL
2. Enter your username and password
3. Click **Log In**

1.2 User Roles

Role	Description	Capabilities
Administrator	Full access	All features, user management
Observer	Read-only	View all data, export
Internal Panel	Reviewer	Rate assigned outputs
Colleague	Staff member	Manage own outputs

2 Managing Outputs

2.1 Adding an Output

1. Click **Add Output**
2. Complete the form fields
3. Click **Save**

2.2 Publication Types

Code	Type
A	Journal Article
B	Book
C	Book Chapter
D	Conference Paper
E	Patent
F	Software
G	Performance/Exhibition
H	Other

3 DOI Auto-Fetch (New in v4.0)

Automatically populate output metadata from a DOI.

3.1 Using DOI Auto-Fetch

1. Navigate to **Outputs → Add Output**
2. In the **Intelligent Output Entry** section:

- Paste the DOI (e.g., 10.1038/nature12373)
 - Click **Auto-Fill**
3. Review and adjust populated fields
 4. Select the Colleague and add ratings
 5. Click **Save**

3.2 Supported DOI Formats

All these formats work:

- 10.1038/nature12373
- doi:10.1038/nature12373
- https://doi.org/10.1038/nature12373

4 O/S/R Quality Ratings (New in v4.0)

Three-component quality assessment aligned with REF 2029.

4.1 Rating Components

Component	What to Assess
Originality	Innovation, new ideas, novel approaches
Significance	Importance, influence, reach, impact
Rigour	Quality of execution, methodology, evidence

4.2 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

4.3 Rating Sources

Each output can receive ratings from three sources:

1. **Internal Panel** (blue card) – Departmental reviewers
2. **Critical Friend** (yellow card) – External reviewers
3. **Self-Assessment** (green card) – Author's evaluation

4.4 Entering Ratings

1. Edit an output
2. Scroll to **Quality Ratings (O/S/R)** section
3. Enter decimal values (0.00-4.00) for each component
4. Save

5 Open Access Compliance (New in v4.0)

Track REF 2029 Open Access requirements.

5.1 OA Status Types

Status	Description
Gold	Published in full OA journal
Green	Available via repository (YORA)
Hybrid	OA article in subscription journal
Bronze	Free to read, no formal license
Closed	Paywalled

5.2 Compliance Dates

- **Acceptance Date:** When accepted by journal
- **Deposit Date:** When uploaded to repository
- **Embargo End Date:** When full-text becomes public

5.3 3-Month Deposit Rule

REF 2029 requires outputs to be deposited within 3 months (92 days) of acceptance.

- **Compliant:** deposit_date – acceptance_date \leq 92 days
- **Non-compliant:** deposit_date – acceptance_date > 92 days

6 REF Narrative Statements (New in v4.0)

6.1 Double-Weighting Statement

Required if output is marked as double-weighted.

- Word Limit: 300 words
- Purpose: Justify why output merits double weighting

6.2 Interdisciplinary Statement

Optional for cross-panel outputs.

- Word Limit: 500 words
- Purpose: Explain cross-panel methodology and value

7 Bulk Import (New in v4.0)

Enhanced bulk import with DOI lookup.

7.1 Import Modes

Mode	Description
Hybrid	Fetches DOI metadata where available, uses CSV otherwise
Smart	Only imports rows with DOIs
Manual	Uses CSV data directly, no API calls

7.2 Running an Import

1. Navigate to **Outputs → Bulk Import**
2. Select import mode
3. Upload CSV file
4. Enable options (skip duplicates, auto-link)
5. Click **Start Import**

8 Risk Assessment

8.1 Risk Levels

Score	Level	Colour	Action
0.00-0.24	Low	Green	Proceed
0.25-0.49	Medium-Low	Yellow	Monitor
0.50-0.74	Medium-High	Orange	Mitigate
0.75-1.00	High	Red	Urgent

9 Getting Help

- Check the Troubleshooting guide
- Contact: george.tsoulas@york.ac.uk
- GitHub: <https://github.com/gtsoulas/ref-manager>