REF-Manager

Research Excellence Framework
Submission Management System

Version 4.0.0 "REF 2029 Ready"

George Tsoulas
Department of Language and Linguistic Science
University of York

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> **REF-Manager** is a comprehensive web-based application designed to help UK university departments manage their Research Excellence Framework (REF) submissions for REF 2029.

Contents

1   Overview

REF-Manager provides tools for:

- Tracking research outputs with comprehensive metadata

- Three-component O/S/R quality assessments (Originality, Significance, Rigour)

- DOI auto-fetch for automatic metadata population

- Managing internal and external reviews

- Open Access compliance tracking

- REF narrative statements support

- Optimising submission portfolios

2   What's New in Version 4.0

2.1 O/S/R Rating System

- Three-component quality ratings on 0.00-4.00 scale

- Ratings from Internal Panel, Critical Friend, and Self-Assessment

- Automatic average calculations

2.2 DOI Auto-Fetch

- Paste DOI to auto-populate metadata

- Integration with OpenAlex database

- Fetches title, authors, venue, OA status, citations

2.3 Enhanced Bulk Import

- Three modes: Hybrid, Smart, Manual

- Duplicate detection

- Auto-link to colleagues

2.4 Open Access Compliance

- Track acceptance, deposit, embargo dates

- Automatic 3-month rule verification

- Exception recording

Component	Requirement
Python	3.10 or higher
Django	4.2.x
Database	SQLite (dev) or PostgreSQL 15 (prod)
Memory	2 GB RAM minimum

Table 1: Minimum system requirements

3 System Requirements

4 Quick Installation

1. Clone repository: `git clone https://github.com/gtsoulas/ref-manager.git`

2. Create virtual environment: `python -m venv venv`

3. Activate: `source venv/bin/activate`

4. Install dependencies: `pip install -r requirements.txt`

5. Install requests: `pip install requests`

6. Configure: `cp env.example .env`

7. Migrate: `python manage.py migrate`

8. Create admin: `python manage.py createsuperuser`

9. Setup roles: `python manage.py setup_roles -create-profiles -superusers-admin`

10. Run: `python manage.py runserver`

5 O/S/R Rating Scale

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

Table 2: O/S/R rating scale

6 Documentation

7 License

REF-Manager is released under the GNU General Public License v3.0.

Document	Description
Quick Start Guide	Get running in 15 minutes
User Guide	Complete user documentation
Technical Documentation	Server deployment reference
Troubleshooting	Common issues and solutions
Changelog	Version history

Table 3: Available documentation

8 Contact

- **Author**: George Tsoulas

- **Email**: george.tsoulas@york.ac.uk

- **GitHub**: https://github.com/gtsoulas/ref-manager