

REF Manager v2.0

Quick Start Guide

Get up and running in 10 minutes!

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Abstract

This Quick Start Guide will help you install and configure REF Manager v2.0 in approximately 10 minutes. Whether you're setting up for the first time or upgrading from version 1.0, this guide provides step-by-step instructions to get your system running quickly.

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1 Prerequisites

Before you start, ensure you have:

- Python 3.10 or higher installed
- Terminal/Command Prompt access
- Internet connection
- 500MB free disk space

1.1 Quick Check

Verify your Python version:

```
1 python3 --version
```

You should see version 3.10 or higher.

2 Installation (10 Minutes)

2.1 Step 1: Download and Setup (2 minutes)

```
1 # Create project directory
2 mkdir -p ~/ref-project-app
3 cd ~/ref-project-app
4
5 # If using Git
6 git clone https://github.com/yourusername/ref-manager.git
7 cd ref-manager
```

Or extract ZIP file if downloaded manually.

2.2 Step 2: Create Virtual Environment (1 minute)

```
1 # Create virtual environment
2 python3 -m venv venv
3
4 # Activate it
5 # Linux/macOS:
6 source venv/bin/activate
7
8 # Windows:
9 venv\Scripts\activate
10
11 # You should see (venv) in your prompt
```

2.3 Step 3: Install Dependencies (3 minutes)

```
1 # Upgrade pip
2 pip install --upgrade pip
3
4 # Install all required packages
5 pip install -r requirements.txt
6
7 # If on Python 3.13 and getting errors:
8 pip install --break-system-packages -r requirements.txt
```

What gets installed:

- Django 4.2+ (web framework)
- django-crispy-forms (beautiful forms)
- openpyxl (Excel export) **NEW in v2.0**
- gunicorn (production server)
- psycopg2-binary (PostgreSQL support)

2.4 Step 4: Configure Environment (1 minute)

```
1 # Copy environment template
2 cp .env.example .env
3
4 # Generate a secret key
5 python -c "from django.core.management.utils import get_random_secret_key;
6     print(get_random_secret_key())"
7
8 # Edit .env file
9 nano .env # or use any text editor
```

Minimum .env configuration:

```
1 SECRET_KEY=paste-the-secret-key-here
2 DEBUG=True
3 ALLOWED_HOSTS=localhost,127.0.0.1
```

2.5 Step 5: Initialize Database (2 minutes)

```
1 # Create database tables
2 python manage.py migrate
3
4 # Create admin user
5 python manage.py createsuperuser
6 # Enter username, email, and password when prompted
```

2.6 Step 6: Start the Server (1 minute)

```
1 # Run development server
2 python manage.py runserver
3
4 # Server should start at http://127.0.0.1:8000
```

Congratulations!

Your REF Manager is now running! Open your browser and go to:
<http://localhost:8000>

3 First Steps After Installation

3.1 Log In (1 minute)

1. Open <http://localhost:8000>
2. Click “Login” in the top right
3. Enter your superuser credentials
4. You’ll see the dashboard

3.2 Explore the Dashboard (2 minutes)

The dashboard shows:

- **Submission Statistics:** Output counts and quality profile
- **Staff Summary:** Current and former colleagues
- **Review Progress:** Critical Friends and Internal Panel
- **Task Overview:** NEW - Urgent and overdue tasks
- **Recent Activity:** Latest changes

3.3 Add Your First Colleague (3 minutes)

1. Click “Colleagues” in navigation
2. Click “Add Colleague” button
3. Fill in:
 - First name, Last name
 - Email
 - Unit of Assessment
 - FTE (Full-Time Equivalent, e.g., 1.0)
 - **Employment Status:** Current (NEW in v2.0)
 - **Category:** Choose appropriate type (NEW in v2.0)
4. Click “Save”

NEW Categories in v2.0

- Independent Researcher
- Non-Independent Researcher (for post-docs!)
- Post-Doctoral Researcher
- Research Assistant
- Academic Staff
- Support Staff
- Co-author (External)

4 Try v2.0 Features (5 minutes)

4.1 Create a Task

1. Click “**Tasks**” in navigation
2. Click “**Create Task**”
3. Fill in:
 - Title
 - Category (e.g., “Submission”, “Administrative”)
 - Priority (Low, Medium, High, Urgent)
 - Due Date
 - Description
4. Click “**Save**”

4.2 Set Up Internal Panel

1. Click “**Internal Panel**” in navigation
2. Click “**Add Panel Member**”
3. Select a colleague
4. Choose role (Chair, Member, Specialist)
5. Click “**Save**”

4.3 Try CSV Import

1. Click “**Outputs**” → “**Import**”
2. Download the CSV template
3. Fill in output data
4. Upload CSV file
5. Review and confirm import

5 Daily Workflow

5.1 Typical REF Manager Day

5.1.1 Morning (5 minutes)

- Check dashboard for urgent tasks
- Review overdue reviews
- Check recent activity

5.1.2 During the Day

- Add new outputs as they're published
- Update colleague information
- Assign papers for review
- Track review progress
- Complete tasks

5.1.3 Weekly (15 minutes)

- Review quality profile
- Check submission progress
- Update request status
- Generate reports

5.1.4 Monthly (30 minutes)

- Full review progress audit
- Update staff status (current/former)
- Export data for meetings
- Generate comprehensive reports

6 Running as Background Service

6.1 Option 1: Using Screen (Simplest)

```
1 # Install screen
2 sudo apt-get install screen
3
4 # Start screen session
5 screen -S ref-manager
6
7 # Run server
8 cd ~/ref-project-app/ref-manager
9 source venv/bin/activate
10 python manage.py runserver 0.0.0.0:8000
11
12 # Detach: Press Ctrl+A, then D
13
14 # Reattach later
15 screen -r ref-manager
```

6.2 Option 2: Using systemd (Production)

Create service file:

```
1 sudo nano /etc/systemd/system/ref-manager.service
```

Add this content (replace YOUR_USERNAME):

```
1 [Unit]
2 Description=REF Manager Django Application
3 After=network.target
4
5 [Service]
6 Type=simple
7 User=YOUR_USERNAME
8 WorkingDirectory=/home/YOUR_USERNAME/ref-project-app/ref-manager
9 Environment="PATH=/home/YOUR_USERNAME/ref-project-app/ref-manager/venv/bin"
10 ExecStart=/home/YOUR_USERNAME/ref-project-app/ref-manager/venv/bin/gunicorn
11   \
12   --workers 3 \
13   --bind 0.0.0.0:8000 \
14   ref_manager.wsgi:application
15 Restart=always
16
17 [Install]
18 WantedBy=multi-user.target
```

Enable and start:

```
1 sudo systemctl enable ref-manager
2 sudo systemctl start ref-manager
3 sudo systemctl status ref-manager
```

6.3 Manage the Service

```
1 # Start
2 sudo systemctl start ref-manager
3
4 # Stop
```

```
5 sudo systemctl stop ref-manager
6
7 # Restart (after code changes)
8 sudo systemctl restart ref-manager
9
10 # Check status
11 sudo systemctl status ref-manager
12
13 # View logs
14 sudo journalctl -u ref-manager -f
```

7 Quick Commands Reference

7.1 Daily Commands

```
1 # Start server (development)
2 python manage.py runserver
3
4 # Start server (accessible from other computers)
5 python manage.py runserver 0.0.0.0:8000
6
7 # Access Django shell
8 python manage.py shell
9
10 # Create backup
11 cp db.sqlite3 backups/db.sqlite3.$(date +%Y%m%d)
```

7.2 Admin Tasks

```
1 # Create new user
2 python manage.py createsuperuser
3
4 # Change password
5 python manage.py changepassword username
6
7 # Collect static files (production)
8 python manage.py collectstatic --noinput
```

7.3 Database Tasks

```
1 # Create migrations (after model changes)
2 python manage.py makemigrations
3
4 # Apply migrations
5 python manage.py migrate
6
7 # Show migration status
8 python manage.py showmigrations
9
10 # Access database directly
11 python manage.py dbshell
```

8 Quick Fixes for Common Issues

8.1 Can't Log In

```
1 # Reset password
2 python manage.py changepassword yourusername
```

8.2 Page Not Loading / CSS Not Working

```
1 # Collect static files
2 python manage.py collectstatic --noinput
3
4 # Restart server
5 # Press Ctrl+C, then run again
6 python manage.py runserver
```

8.3 “No Such Table” Errors

```
1 # Run migrations
2 python manage.py migrate
```

8.4 Python 3.13 Compatibility

If you see: `TypeError: unsupported operand type(s) for *: 'decimal.Decimal' and 'float'`
This is already fixed in v2.0 code. Update to latest version.

9 What's New in v2.0

9.1 Major Additions

- ✓ **Employment Status Tracking** - Current vs Former staff
- ✓ **Enhanced Categories** - 9 colleague types
- ✓ **Internal Panel System** - Internal reviewer management
- ✓ **Task Management** - Track all activities
- ✓ **CSV Import** - Bulk operations
- ✓ **Excel Export** - Export with clickable links
- ✓ **Enhanced Requests** - Mark complete, delete
- ✓ **Dashboard Updates** - New widgets

10 Next Steps

After Quick Start:

1. **Read the User Guide (USER-GUIDE.md)**
 - Detailed feature documentation
 - Best practices
 - Advanced workflows
2. **Check Technical Documentation (TECHNICAL-DOCUMENTATION.md)**
 - System architecture
 - Development guide
 - API reference
3. **Review Troubleshooting Guide (TROUBLESHOOTING.md)**
 - Detailed problem solving
 - Performance optimization
 - Security considerations
4. **Read the Changelog (CHANGELOG.md)**
 - Version history
 - All changes and improvements
 - Migration notes

11 Pro Tips

1. **Regular Backups:** Back up database daily

```
1 cp db.sqlite3 backups/db.sqlite3.$(date +%Y%m%d)  
2
```

2. **Use Categories:** Properly categorize colleagues for better reporting
3. **Track Everything:** Use tasks to track all REF activities
4. **Export Often:** Export data regularly for meetings and reports
5. **Former Staff:** Don't delete former staff - mark as "Former" instead
6. **CSV Import:** Use CSV import for bulk data entry - much faster!
7. **Excel Export:** Export assignments with links to send to reviewers
8. **Dashboard:** Check dashboard daily for urgent items
9. **Internal vs External:** Use Internal Panel for university reviewers, Critical Friends for external
10. **Quality Ratings:** Update ratings as papers are evaluated

12 Checklist

Use this checklist to ensure proper setup:

12.1 Installation

- Python 3.10+ installed
- Virtual environment created
- Dependencies installed
- Environment variables configured
- Database initialized
- Superuser created
- Server runs without errors

12.2 Initial Setup

- First login successful
- Dashboard displays correctly
- Added at least one colleague
- Added at least one output
- Created a task (v2.0)
- Set up Internal Panel member (v2.0)

12.3 Testing v2.0 Features

- Tried colleague categories
- Marked someone as former staff
- Created an internal panel member
- Created and completed a task
- Tested CSV import
- Tested Excel export with links

12.4 Production (Optional)

- Background service configured
- Automatic startup enabled
- Backup script created
- Staff trained

Need More Help?

See the complete documentation suite or contact your system administrator.

Ready to become a REF Manager pro? Read the User Guide next!