

# REF-Manager

## Research Excellence Framework Submission Management System

Version 3.0.0

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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.

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## 1 Overview

REF-Manager provides tools for:

- Tracking research outputs with comprehensive metadata
- Coordinating quality assessments from multiple sources
- Managing internal and external reviews
- Assessing and mitigating submission risks
- Optimising submission portfolios
- Generating reports and exports

## 2 Key Features

### 2.1 Research Output Management

- Multiple publication types (articles, books, chapters, etc.)
- Complete bibliographic metadata
- BibTeX and CSV import
- Status workflow tracking

### 2.2 Multi-Dimensional Quality Assessment

- Internal Panel ratings
- External Critical Friend ratings
- Self-Assessment ratings
- Automatic average calculation

### 2.3 Risk Assessment Framework

- Content risk scoring
- Timeline risk based on publication status
- Open Access compliance tracking
- Configurable risk weights

### 2.4 Portfolio Optimisation

- Submission scenario modelling
- Quality and risk metrics
- Representativeness scoring
- Equality and diversity metrics

## 2.5 Role-Based Access Control

- Four user roles: Administrator, Observer, Internal Panel, Colleague
- Multi-role support
- Granular permissions

## 3 System Requirements

| Component | Requirement                           |
|-----------|---------------------------------------|
| Python    | 3.10 or higher                        |
| Django    | 4.2.x                                 |
| Database  | SQLite (dev) or PostgreSQL 14+ (prod) |
| Memory    | 2 GB RAM minimum                      |

Table 1: Minimum 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. Configure: `cp env.example .env`
6. Migrate: `python manage.py migrate`
7. Create admin: `python manage.py createsuperuser`
8. Setup roles: `python manage.py setup_roles -create-profiles -superusers-admin`
9. Run: `python manage.py runserver`

## 5 Documentation

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

Table 2: Available documentation

## 6 License

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

## 7 Contact

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