Contents

1 REF Manager v2.0 - User Guide

Complete Feature Guide and Best Practices

Version: 2.0.0
Last Updated: November 3, 2025
For: All REF Manager Users

1.1 Table of Contents

1.2 □ Introduction

Welcome to the REF Manager v2.0 User Guide. This comprehensive guide covers all features and provides best practices for effective REF submission management.

1.2.1 What's New in v2.0

REF Manager v2.0 introduces major enhancements:

- □ **Employment Status Tracking**: Current vs Former staff
- □ **Enhanced Categories**: 9 colleague types including non-independent researchers
- □ **Internal Panel System**: Complete internal review management
- □ **Task Management**: Track all REF activities
- □ **CSV Import**: Bulk data import
- □ **Excel Export**: Export assignments with clickable links
- □ **Enhanced Dashboard**: New widgets for tasks and internal panel

1.2.2 Who Should Use This Guide

- **REF Coordinators**: Managing overall submission
- **Department Administrators**: Supporting REF process
- **Academic Staff**: Contributing outputs and participating in reviews
- **Panel Members**: Internal and external reviewers

1.3 □ Dashboard Overview

The dashboard is your central hub for monitoring REF submission progress.

1.3.1 Dashboard Widgets

1.3.1.1 1. Submission Statistics **What it shows:** - Total number of outputs - Quality profile breakdown (4*, 3*, 2*, 1*, Unclassified) - Average quality score - Distribution by Unit of Assessment

How to use it: - Quick assessment of submission quality - Identify areas needing improvement - Track progress toward quality targets - Monitor UoA balance

Example interpretation:

```
Total Outputs: 125
4*: 45 (36%)  ← Excellent! Target: 30%+
3*: 50 (40%)  ← Good solid base
2*: 20 (16%)  ← Acceptable
1*: 5 (4%)    ← Review these
Unclassified: 5 (4%)  ← Need evaluation
Average: 3.04 ← Above target of 3.0
```

1.3.1.2 2. Staff Summary **What it shows:** - Total current colleagues - Former staff count - Category breakdown - Average outputs per colleague - Employment status distribution

How to use it: - Monitor staff contributions - Identify colleagues needing more outputs - Track employment changes - Plan submission strategy

1.3.1.3 3. Review Progress **What it shows:** - Critical Friends assignments - Internal Panel assignments □ NEW - Pending reviews - Completed reviews - Average review turnaround time

How to use it: - Monitor review deadlines - Identify bottlenecks - Follow up on overdue reviews - Track reviewer workload

1.3.1.4 4. Internal Panel Statistics □ NEW in v2.0 **What it shows:** - Total panel members - Active assignments - Completed internal reviews - Quality rating distribution from internal reviews - Pending assessments

How to use it: - Monitor internal evaluation progress - Balance panel member workload - Track internal quality consensus - Identify outputs needing attention

Example:

```
Panel Members: 8
Active Assignments: 45
Completed Reviews: 78
Pending: 12
Average Internal Rating: 3.2
```

1.3.1.5 5. Task Overview □ NEW in v2.0 **What it shows:** - Urgent tasks (due within 7 days) - Overdue tasks - Tasks by status (Pending, In Progress, Completed) - Tasks by priority - Upcoming deadlines

How to use it: - Prioritize daily work - Never miss deadlines - Track team progress - Identify blockers

Color coding: - □ Red: Overdue - immediate action required - □ Yellow: Due soon - urgent attention needed - □ Green: On track - monitor progress - ○ Gray: Completed - archive reference

1.3.1.6 6. Recent Activity **What it shows:** - Latest outputs added - Recent reviews completed - New requests - System updates - Recent status changes

How to use it: - Stay informed of changes - Quick access to recent items - Monitor team activity - Audit trail

1.3.2 Dashboard Best Practices

1. **Check Daily**: Review dashboard each morning
2. **Act on Red Flags**: Address urgent items immediately
3. **Monitor Trends**: Track quality and completion over time
4. **Share**: Use dashboard in team meetings
5. **Export**: Take screenshots for reports

1.4 □ Colleague Management

Manage all staff involved in REF submissions, including current and former employees.

1.4.1 Adding a Colleague

Step-by-step:

1. Click **“Colleagues”** in navigation
2. Click **“Add Colleague”** button
3. Fill in **Basic Information**:
    - First Name *
    - Last Name *
    - Email *
    - Title (e.g., Professor, Dr., etc.)
4. Set **Employment Details**: □ ENHANCED in v2.0
    - **Employment Status**: Current or Former *
    - **Employment End Date**: (if Former)
    - **FTE** (Full-Time Equivalent): 0.1 to 1.0 *
    - **Unit of Assessment**: Select primary UoA *
5. Choose **Colleague Category**: □ NEW in v2.0
    - Independent Researcher
    - Non-Independent Researcher (for post-docs)
    - Post-Doctoral Researcher
    - Research Assistant
    - Academic Staff
    - Support Staff
    - Current Employee
    - Former Employee
    - Co-author (External)
6. Add **Optional Information**:
    - Office location
    - Phone number

- Research interests
    - Biography
    - Profile photo
7. Click **“Save”**

1.4.2 Understanding Colleague Categories NEW

1.4.2.1 Independent Researcher

- **Who**: Established researchers with independent research programs
- **Characteristics**: Can be sole author, lead major projects, supervise PhDs
- **Example**: Professors, Senior Lecturers with established track record
- **REF significance**: Can submit as independent researchers

1.4.2.2 Non-Independent Researcher

- **Who**: Post-doctoral researchers and early career staff
- **Characteristics**: Working under supervision, not yet independent
- **Example**: Post-docs, Research Fellows in early career
- **REF significance**: Important to identify for submission rules

1.4.2.3 Post-Doctoral Researcher

- **Who**: Specific designation for post-doc positions
- **Characteristics**: Between PhD and permanent position
- **Example**: Fixed-term post-doctoral research staff
- **REF significance**: May have different submission rules

1.4.2.4 Research Assistant

- **Who**: Research support staff
- **Characteristics**: Assist with research but don’t lead projects
- **Example**: Lab technicians, research coordinators
- **REF significance**: Contributions need to be tracked

1.4.2.5 Academic Staff

- **Who**: Teaching and research faculty
- **Characteristics**: Both teaching and research responsibilities
- **Example**: Lecturers, Senior Lecturers
- **REF significance**: Expected to contribute outputs

1.4.2.6 Support Staff

- **Who**: Administrative and technical support
- **Characteristics**: Support research but don’t produce outputs
- **Example**: Lab managers, research administrators
- **REF significance**: Usually not submitting outputs

1.4.2.7 Current Employee

- **Who**: Generic current staff category
- **Characteristics**: Currently employed
- **Example**: When specific category unclear
- **REF significance**: Active contributors

1.4.2.8 Former Employee

- **Who**: Past employees whose data we retain
- **Characteristics**: No longer employed
- **Example**: Staff who left during REF period
- **REF significance**: Their outputs still count

1.4.2.9 Co-author (External)

- **Who**: External collaborators
- **Characteristics**: Not department staff
- **Example**: Co-authors from other institutions
- **REF significance**: Track collaborations

1.4.3 Employment Status Management NEW

1.4.3.1 Current Staff Characteristics: - Actively employed - Appear in drop-down menus - Can be assigned outputs and reviews - Contribute to active statistics

Best practices: - Keep information up-to-date - Track FTE changes - Update categories as roles change - Monitor output contributions

1.4.3.2 Former Staff When to use: - Staff who left during REF period - Staff who retired - Staff who moved to other institutions

Why keep them: - Their outputs still count for REF - Historical record maintenance - Audit trail - Acknowledgment of contributions

How to mark as Former: 1. Edit colleague 2. Change Employment Status to "Former" 3. Set Employment End Date 4. Save

What happens: - Data preserved - Removed from active dropdowns - Still linked to outputs - Appears in former staff reports

1.4.4 Viewing Colleagues

1.4.4.1 List View Features: - Filter by employment status (Current/Former) - Filter by category - Sort by name, UoA, output count - Search by name or email - Quick view of key stats

Category Statistics NEW: Shows breakdown like:

```
Independent: 15
Non-Independent: 5
Post-Doctoral: 3
Academic Staff: 25
External Collaborators: 12
```

Employment Status Badges 🆕 NEW: - ✅ Current: Green badge - ⚪ Former: Gray badge

1.4.4.2 Detail View

What you see: - Complete profile information - Employment history - Research outputs list - Quality profile - Review assignments - Contact information - Required vs actual outputs

Actions available: - Edit information - Mark as former - Assign outputs - View reports - Export data

1.4.5 Required Outputs Calculation

Formula:

```
Required Outputs = FTE × 2.5
```

Examples: - FTE 1.0: 2.5 outputs required - FTE 0.8: 2.0 outputs required - FTE 0.5: 1.25 outputs required

Dashboard shows: - Actual outputs submitted - Required outputs - Surplus or deficit - Percentage completion

1.4.6 Best Practices

1. **Accurate FTE**: Essential for correct calculations
2. **Update Promptly**: Change status when staff leave
3. **Choose Right Category**: Important for reporting
4. **Don't Delete**: Mark as Former instead
5. **External Co-authors**: Tag them properly
6. **Regular Audits**: Check accuracy monthly

1.5 📄 Research Output Management

Track all research outputs eligible for REF submission.

1.5.1 Adding an Output

Step-by-step:

1. Click **"Outputs"** in navigation
2. Click **"Add Output"** button
3. Fill in **Publication Details**:

- **Title**: Complete publication title *
- **All Authors**: Full author list in correct order *
- **Publication Venue**: Journal, conference, or publisher *
- **Publication Type**: * Choose from:
  - Journal Article
  - Conference Paper
  - Book
  - Book Chapter
  - Monograph
  - Report
  - Other

4. Set **Publication Information**:
   - **Publication Date**: * (YYYY-MM-DD format)
   - **Volume, Issue, Pages**: If applicable
   - **DOI**: Digital Object Identifier
   - **URL**: Online location
5. Upload **PDF File**:
   - Click “Choose File”
   - Select PDF of publication
   - Maximum 20MB
   - Stored securely
6. Set **REF Details**: *
   - **Lead Author**: Select from colleagues dropdown
   - **Unit of Assessment**: Primary UoA
   - **Quality Rating**: 4, *3*, 2*, 1*, Unclassified
   - **REF Eligible**: Yes/No checkbox
   - **Status**: Draft, Under Review, Accepted, Published
7. Add **Additional Information**:
   - **Keywords**: Comma-separated
   - **Abstract**: Brief summary
   - **Notes**: Internal notes for team
8. Click **“Save”**

1.5.2 Quality Ratings

1.5.2.1 Understanding the Rating System

4* (World-Leading) - Quality: World-leading in originality, significance, rigour - Impact: International importance - Examples: Published in top journals, highly cited - Target: 30% or more

3* (Internationally Excellent) - Quality: Internationally excellent - Impact: Makes important contribution - Examples: Good international journals - Target: 50% or more

2* (Recognized Internationally) - Quality: Recognized internationally - Impact: Some contribution - Examples: Decent journals, conference papers - Target: Acceptable supporting base

1* (Recognized Nationally) - Quality: Recognized nationally - Impact: Limited contribution - Examples: Local publications - Target: Minimize

Unclassified - Not yet evaluated - Awaiting review - Insufficient information - Target: Evaluate all outputs

1.5.2.2 Rating Best Practices

1. **Multiple Reviews**: Get both internal and external opinions
2. **Evidence-Based**: Use citations, journal rankings
3. **Consistency**: Apply criteria uniformly
4. **Documentation**: Record reasoning
5. **Regular Review**: Ratings can change over time

1.5.3 Bulk Operations

1.5.3.1 CSV Import NEW in v2.0 **Perfect for:** - Importing many outputs at once - Migrating from other systems - Batch updates

Process:

1. **Download Template**:
    - Go to Outputs → Import
    - Click "Download CSV Template"
    - Open in Excel or text editor
2. **Fill in Data**: Required columns:
    - title
    - all_authors
    - publication_venue
    - publication_type
    - publication_date
    - quality_rating
    - author_email (to link to colleague)
    - uoa
    - ref_eligible (true/false)

    Optional columns:
    - doi
    - url
    - volume, issue, pages
    - keywords
    - abstract
    - notes
3. **Prepare CSV**:
    - Save as UTF-8 CSV
    - Check for special characters
    - Verify email addresses match colleagues
    - Ensure dates in YYYY-MM-DD format
4. **Upload**:
    - Click "Choose File"
    - Select your CSV
    - Click "Upload and Validate"
5. **Review**:
    - System checks for errors
    - Shows validation results
    - Detects duplicates
    - Auto-links to colleagues
6. **Confirm**:
    - Review summary

- Check matched colleagues
- Click “Confirm Import”
- Outputs created

CSV Import Tips: - Start with template - don’t create from scratch - Test with 2-3 rows first - External co-authors auto-categorized - Duplicates detected by title and DOI - Partial matches require manual review

1.5.4 Filtering and Searching

Filter Options: - Quality rating (4, 3, 2, 1, Unclassified) - Author (by colleague) - Unit of Assessment - Publication type - REF eligibility - Status - Date range

Search: - By title keywords - By author name - By venue - By DOI

Sorting: - By quality (highest first) - By date (newest first) - By title (alphabetical) - By author

1.5.5 Output Detail View

Information Shown: - Full publication details - PDF viewer (if uploaded) - Quality rating with visual indicator - Link to DOI (if available) - All authors with colleague links - Review history - Assignment status

Actions Available: - Edit output - Update quality rating - Upload/replace PDF - Assign to reviewers - Generate report - Export data - Delete (with confirmation)

1.5.6 Best Practices

1. **Complete Information**: Fill all fields possible
2. **Upload PDFs**: Makes review easier
3. **Accurate Authors**: Critical for credit assignment
4. **DOI Links**: Verify accessibility
5. **Regular Updates**: Add outputs as published
6. **Quality Evidence**: Document rating rationale
7. **CSV for Bulk**: Use import for many outputs

1.6 □ Critical Friends System

Manage external peer reviewers from other institutions.

1.6.1 About Critical Friends

What are Critical Friends? - External reviewers from other UK institutions - Provide independent quality assessment - Help calibrate ratings - Offer feedback on submission strategy

Why use them? - External validation - Cross-institution benchmarking - Fresh perspective - REF preparation

1.6.2 Adding a Critical Friend

Step-by-step:

1. Click **"Critical Friends"** in navigation
2. Click **"Add Critical Friend"** button
3. Fill in **Contact Information**: *
   - First Name
   - Last Name
   - Email
   - Institution
4. Add **Professional Details**:
   - Position/Title
   - Department
   - Expertise Areas (comma-separated)
   - Unit of Assessment
   - Biography
5. Set **Availability**:
   - Available/Unavailable toggle
   - Maximum assignments
   - Preferred review timeline
6. Click **"Save"**

1.6.3 Assigning Outputs to Critical Friends

Method 1: From Output Detail

1. View output
2. Click **"Assign to Critical Friend"**
3. Select critical friend
4. Set due date and priority
5. Add notes
6. Click **"Assign"**

Method 2: From Critical Friend Profile

1. View critical friend
2. Click **"Assign Output"**
3. Select output
4. Set details
5. Click **"Assign"**

1.6.4 Assignment Tracking

Assignment Status: - **Assigned**: Sent to reviewer, waiting - **In Progress**: Reviewer working on it - **Completed**: Review received - **Deferred**: Postponed - **Cancelled**: No longer needed

Priority Levels: - **High**: Urgent, key outputs - **Medium**: Normal priority - **Low**: When convenient

1.6.5 Export Assignments NEW in v2.0

Perfect for: - Sending assignments to reviewers - Progress tracking - Meeting preparation - Email distribution

Process:

1. Go to **"Export"** → **"Assignments"**
2. Set filters:
    - Reviewer Type: Critical Friends
    - Specific Reviewer: (optional)
    - Author: (optional)
    - Status: (optional)
3. Click **"Export to Excel"**

Excel Output: - **Color-coded**: Yellow background for Critical Friends - **Clickable Links**: Direct links to PDF files - **Complete Info**: - Reviewer name and email - Output title and author - Quality rating - Review status - Due date - Priority - Notes

Use Cases:

```
Scenario 1: Send to Reviewer
- Export assignments for specific reviewer
- Email Excel file with links to papers
- Reviewer can click directly to PDFs

Scenario 2: Progress Meeting
- Export all assignments
- Show workload distribution
- Track completion rates
- Identify delays

Scenario 3: Reporting
- Export by status
- Show completed reviews
- Calculate turnaround times
- Quality analysis
```

1.6.6 Managing Reviews

Recording Feedback:

1. Go to assignment
2. Click **"Update Status"** → **"In Progress"**
3. When complete:
    - Set status to **"Completed"**
    - Record rating received
    - Add review notes
    - Set completion date

4. Save

Review Content to Track: - Quality rating suggested - Strengths identified - Weaknesses noted - Recommendations - Additional comments

1.6.7 Critical Friends Dashboard

What it Shows: - Total critical friends - Active vs. inactive - Current assignments - Completed reviews - Average turnaround time - Workload distribution

1.6.8 Best Practices

1. **Reciprocity**: Offer to review for them too
2. **Clear Instructions**: Provide review guidelines
3. **Reasonable Deadlines**: Allow 2-4 weeks
4. **Avoid Overload**: Max 5-10 papers per reviewer
5. **Follow Up**: Send reminders politely
6. **Thank Reviewers**: Acknowledge their time
7. **Use Excel Export**: Makes communication easy □ NEW

1.7 □⚖ Internal Panel System □ NEW in v2.0

Manage your university's internal evaluation committee, separate from external Critical Friends.

1.7.1 About Internal Panel

What is the Internal Panel? - University's own evaluation committee - Internal quality assurance - First line of review before external - Different from Critical Friends (external reviewers)

Why Separate System? - Different workflow and process - Internal vs external perspective - Different reporting requirements - Separate dashboard tracking

Key Differences:

Aspect	Internal Panel	Critical Friends
Location	Same institution	External institutions
Purpose	Internal QA	External validation
Timing	First review	Second review
Access	More frequent	Limited engagement
Dashboard	Separate widget	Separate widget

1.7.2 Setting Up Internal Panel

1.7.2.1 Adding Panel Members Step-by-step:

1. Click **“Internal Panel”** in navigation
2. Click **“Add Panel Member”** button
3. **Select Colleague**: *
   - Choose from current staff
   - Must be in colleague list first
4. **Assign Role**: * Choose from:
   - **Chair**: Leads the panel, makes final calls
   - **Member**: Regular panel member
   - **Specialist**: Subject matter expert for specific areas
   - **External Liaison**: Coordinates with external reviewers
5. **Set Details**:
   - Expertise Area: Research specialization
   - Available: Yes/No toggle
   - Maximum concurrent assignments
   - Notes: Special skills or preferences
6. Click **“Save”**

1.7.2.2 Panel Member Roles Explained **Chair** - Leads panel meetings - Makes tie-breaking decisions - Coordinates panel activities - Reports to department head - Typically senior professor

Member - Regular review duties - Attends panel meetings - Provides quality assessments - Discusses borderline cases - Typically experienced academics

Specialist - Expert in specific research area - Consulted for specialist outputs - Provides detailed technical review - May not attend all meetings - Typically leading researcher in field

External Liaison - Coordinates with Critical Friends - Manages external communications - Tracks external reviews - Collates feedback - Typically diplomatic senior staff

1.7.3 Assigning Outputs for Internal Review

Method 1: From Output

1. View output details
2. Click **“Assign Internal Panel”**
3. Select panel member (filtered by expertise)
4. Set assignment details:
   - **Status**: Assigned (default)
   - **Priority**: High/Medium/Low
   - **Due Date**: Target completion
   - **Expected Rating**: Optional pre-assessment
5. Add **Review Notes**:
   - Specific aspects to focus on
   - Known concerns
   - Context information

6. Click **“Assign”**

Method 2: From Panel Member

1. View panel member profile
2. Click **“Assign Output”**
3. Select output from list
4. Set assignment details
5. Save

Method 3: Bulk Assignment

1. Go to **“Internal Panel”** → **“Bulk Assign”**
2. Select multiple outputs
3. Choose panel members
4. Distribute evenly or by expertise
5. Set common due date
6. Confirm

1.7.4 Assignment Status Tracking

Status Options:

Assigned - Initial state - Reviewer notified - Awaiting their review - Shows in “Pending” on dashboard

In Progress - Reviewer actively working - May have questions - Partial feedback possible - Shows in “Active” on dashboard

Completed - Review finished - Rating and feedback provided - Ready for panel discussion - Shows in “Completed” on dashboard

Deferred - Temporarily postponed - Needs more information - Awaiting author revision - Shows in “Deferred” on dashboard

1.7.5 Recording Internal Reviews

When review is complete:

1. Open assignment
2. Click **“Record Review”**
3. Fill in **Review Details**:
    - **Rating Recommendation**: 4*, 3*, 2*, 1*
    - **Confidence Level**: High/Medium/Low
    - **Strengths**: What works well
    - **Weaknesses**: Areas of concern
    - **Recommendations**: Improvements needed
    - **Internal Notes**: For panel only
4. Set **Status** to **“Completed”**
5. Set **Completion Date**
6. Click **“Save”**

1.7.6 Internal Panel Dashboard Widget

Displays:

```
Internal Panel Summary
─────────────────────
Panel Members: 8
 ├─ Chair: 1
 ├─ Members: 5
 ├─ Specialists: 2
 └─ Available: 7

Active Assignments: 45
 ├─ Assigned: 12
 ├─ In Progress: 18
 ├─ Completed: 78
 └─ Pending: 15

Average Rating: 3.2
 ├─ 4*: 28 (36%)
 ├─ 3*: 35 (45%)
 ├─ 2*: 12 (15%)
 └─ 1*: 3 (4%)

Workload Distribution:
 ├─ Prof. Smith: 8 active
 ├─ Dr. Jones: 6 active
 └─ Others: Balanced
```

1.7.7 Panel Meetings

Use the system for: - Generate meeting agenda (exports) - Review disagreements (filter by rating variance) - Track decisions made - Record consensus ratings - Assign follow-up actions

Meeting Workflow:

1. **Before Meeting**:
    - Export assignments by status
    - Identify contentious outputs
    - Prepare discussion list
    - Send to panel
2. **During Meeting**:
    - Review ratings
    - Discuss disagreements
    - Reach consensus
    - Assign actions
3. **After Meeting**:
    - Update ratings in system
    - Record decisions
    - Assign re-reviews if needed
    - Send outputs to Critical Friends

1.7.8 Internal vs External Review Workflow

Typical Process:

```
1. Output Added
   ↓
2. Internal Panel Assignment
   ↓
3. Internal Review Completed
   ↓
4. Panel Discussion
   ↓
5. Provisional Rating Set
   ↓
6. Critical Friend Assignment
   ↓
7. External Review Received
   ↓
8. Compare Internal vs External
   ↓
9. Final Rating Decision
   ↓
10. REF Submission
```

1.7.9 Best Practices

1. **Chair Leadership**: Strong chair essential for consistency
2. **Balanced Workload**: Distribute assignments fairly
3. **Expertise Matching**: Assign by subject area
4. **Timely Reviews**: Set realistic deadlines
5. **Regular Meetings**: Monthly panel meetings
6. **Document Decisions**: Record all rating changes
7. **Internal First**: Always review internally before external
8. **Use Dashboard**: Monitor progress daily
9. **Consistent Criteria**: Use same standards throughout
10. **Feedback Loop**: Share learning across panel

1.8 □ Task Management □ NEW in v2.0

Track all REF-related activities beyond just papers and reviews.

1.8.1 About Tasks

What are Tasks? - Action items related to REF submission - Deadlines and milestones - Administrative activities - Meeting actions - Documentation requirements

Why use Tasks? - Never miss deadlines - Coordinate team activities - Track progress - Assign responsibilities - Audit trail

1.8.2 Creating a Task

Step-by-step:

1. Click **“Tasks”** in navigation
2. Click **“Create Task”** button
3. Fill in **Task Details**: *
   - **Title**: Brief, clear description
   - **Description**: Full details and context
4. Set **Classification**:
   - **Category**: * Choose from:
     - Administrative
     - Submission
     - Review
     - Meeting
     - Documentation
     - Deadline
     - Other
   - **Priority**: * Choose from:
     - Low: Nice to have
     - Medium: Important
     - High: Very important
     - Urgent: Critical/immediate
5. Set **Timing**:
   - **Start Date**: When work begins
   - **Due Date**: * Completion deadline
6. **Assignment**:
   - **Assigned To**: Select user (optional)
   - **Created By**: Auto-filled
7. Set **Status**: * Initial status:
   - Pending (default)
   - In Progress
   - Completed
   - Cancelled
8. Click **“Create Task”**

1.8.3 Task Categories Explained

Administrative - Paperwork and forms - Budget requests - Staff approvals - Policy compliance - Examples: “Complete REF declaration form”, “Submit budget request”

Submission - Direct submission activities - Data preparation - Format compliance - Upload activities - Examples: “Prepare final output list”, “Upload PDFs to REF portal”

Review - Review coordination - Follow-up with reviewers - Collate feedback - Rating decisions - Examples: “Chase external reviews”, “Schedule panel meeting”

Meeting - Meeting organization - Agenda preparation - Attendance coordination - Minute taking - Examples: “Book room for panel meeting”, “Send meeting invites”

Documentation - Document creation - Report writing - Record keeping - Archive management - Examples: “Write quality profile report”, “Document rating decisions”

Deadline - Critical dates - Submission cutoffs - External deadlines - Milestone markers - Examples: "REF portal opens", "Final submission deadline"

Other - Miscellaneous tasks - One-off activities - Uncategorized items - Examples: "Research REF guidelines", "Contact other departments"

1.8.4 Priority Levels

Low Priority □ - Can wait - No immediate deadline - Nice to have - Examples: "Update team photos", "Improve documentation"

Medium Priority □ - Normal importance - Standard deadlines - Regular workflow - Examples: "Add new outputs", "Schedule reviews"

High Priority □ - Very important - Near-term deadline - Significant impact - Examples: "Complete quality ratings", "Submit internal review"

Urgent Priority □ - Critical/immediate - Overdue or due today - Blocks other work - Examples: "Final submission TODAY", "Emergency panel meeting"

1.8.5 Managing Tasks

1.8.5.1 Updating Status As work progresses:

1. Open task
2. Click **"Edit"**
3. Change **Status**:
   - Pending → In Progress (when starting)
   - In Progress → Completed (when done)
   - Any → Cancelled (if no longer needed)
4. Add **Notes**: What was done
5. Save

1.8.5.2 Completing Tasks Quick completion:

1. View task
2. Click **"Mark Complete"** button
3. Confirm
4. Task marked complete with timestamp

1.8.5.3 Filtering Tasks Filter options: - By category - By priority - By status - By assigned user - By date range - Overdue only - My tasks only

1.8.5.4 Sorting Tasks Sort by: - Due date (soonest first) - Default - Priority (urgent first) - Created date - Status - Category

1.8.6 Task Dashboard Widget

Displays:

```
Task Overview
─────────────────────
Urgent Tasks: 3 
 ├─ Final submission (Due: Today)
 ├─ Emergency review (Due: Tomorrow)
 └─ Budget approval (Due: This week)

Overdue Tasks: 2 ⚠
 ├─ Panel meeting minutes
 └─ External reviewer follow-up

By Status:
 ├─ Pending: 8
 ├─ In Progress: 12
 ├─ Completed: 156
 └─ Cancelled: 4

By Priority:
 ├─ Urgent: 3
 ├─ High: 7
 ├─ Medium: 10
 └─ Low: 4
```

1.8.7 Task List Views

Main Task List: - All tasks visible - Filter and sort controls - Quick status indicators - Priority badges - Due date with countdown - Assignment info

My Tasks: - Tasks assigned to you - Personalized view - Focus on your work - Quick access

Team Tasks: - All team tasks - See workload distribution - Coordinate efforts - Track progress

1.8.8 Task Best Practices

1. **Be Specific**: Clear, actionable titles
2. **Set Realistic Deadlines**: Don't over-commit
3. **Use Categories**: Helps with filtering and reporting
4. **Assign Properly**: Right person for the job
5. **Update Promptly**: Keep status current
6. **Add Context**: Use description field fully
7. **Check Daily**: Review your tasks each morning
8. **Close Completed**: Mark done promptly
9. **Review Weekly**: Team task review
10. **Archive Old**: Keep list manageable

1.8.9 Task Examples

Good Task Examples:

```
□ "Complete quality ratings for 15 outputs in UoA 27"
   Category: Review, Priority: High, Due: 2 weeks

□ "Send review assignments to Prof. Smith (5 papers)"
   Category: Review, Priority: Medium, Due: 1 week

□ "Finalize submission document for REF portal"
   Category: Submission, Priority: Urgent, Due: 3 days

□ "Schedule panel meeting for borderline cases"
   Category: Meeting, Priority: High, Due: 1 week
```

Poor Task Examples:

```
□ "Do stuff" - Too vague
□ "Things" - No context
□ "Review" - What needs reviewing?
□ "REF" - Too broad
```

1.9 □ Request Management

Track queries and issues from staff, administration, and external parties.

1.9.1 About Requests

What are Requests? - Queries about REF process - Requests for information - Support tickets - Issue tracking - Communication log

Request Types: - Submission queries - Quality disputes - Administrative requests - External submissions - Documentation requests - Technical support

1.9.2 Creating a Request

Step-by-step:

1. Click **“Requests”** in navigation
2. Click **“Create Request”** button
3. Fill in **Request Details**: *
   - **Subject**: Brief description
   - **Description**: Full details
   - **Request Type**: * Select category
4. **Associate with Output** (if relevant):
   - Link to specific output
   - Context for the request
5. Set **Details**:

- **Priority**: High/Medium/Low
- **Status**: Pending (default)
- **Due Date**: Target response date
- **Requester**: Contact info

6. **Assignment**:
   - Assign to colleague (optional)
   - Auto-assigned to creator
7. Click **“Submit Request”**

1.9.3 Request Status Flow

Status Progression:

```
Pending
   ↓
In Progress (working on it)
   ↓
Completed  NEW
```

OR

```
Any Status
   ↓
Deleted (with confirmation)  NEW
```

1.9.4 Managing Requests

1.9.4.1 Updating Requests

1. View request
2. Click **“Edit”**
3. Update status/details
4. Add notes
5. Save

1.9.4.2 Mark as Completed NEW in v2.0 Quick completion:

1. View request
2. Click **“Mark as Complete”** button (green)
3. Confirm on completion page
4. Request marked completed with timestamp
5. Success message displayed

What happens: - Status set to “Completed” - Completion timestamp recorded - Visible in completed requests list - “Mark Complete” button hidden (for completed requests)

1.9.4.3 Delete Request NEW in v2.0 When to delete:
- Duplicate requests - Spam or invalid requests - Accidentally created - No longer relevant

How to delete:

1. View request
2. Click **“Delete”** button (red)
3. Warning confirmation page appears
4. Read warning about permanent deletion
5. Click **“Confirm Delete”** to proceed
6. Request permanently removed
7. Success message shown

Warning: - Deletion is permanent - Cannot be undone - All associated data lost - Consider marking as “Completed” instead

1.9.5 Request List Features

List Display: - Status badges - Priority indicators - Associated output links - Requester information - Due dates - Quick actions

Action Buttons: □ ENHANCED in v2.0 - □ **View**: See full details - □ **Edit**: Update request - □ **Complete**: Mark as done (if not completed) - □ **Delete**: Remove permanently

Conditional Display: - Complete button hidden for completed requests - Delete always available - Edit available for all statuses

1.9.6 Request Detail View

Information Shown: - Full request details - Status history - Related output (if linked) - Requester contact - Priority and dates - Internal notes

Actions Card: - Update status - Mark complete - Edit details - Delete request - Email requester

1.9.7 Request Dashboard

Displays: - Total open requests - By status (Pending, In Progress, Completed) - By priority - Overdue requests - Recent activity - Assignment distribution

1.9.8 Best Practices

1. **Prompt Response**: Acknowledge within 24 hours
2. **Clear Communication**: Keep requester informed
3. **Link Outputs**: Associate with relevant papers
4. **Track Progress**: Update status regularly
5. **Complete When Done**: Mark as complete promptly □ NEW
6. **Don’t Delete Unless Sure**: Use completion instead □ NEW
7. **Use Priorities**: Helps with workload management
8. **Documentation**: Record decisions and actions
9. **Follow Up**: Check on overdue requests
10. **Archive Strategy**: Regular review of old requests

1.10 □ Data Import/Export □ ENHANCED in v2.0

Efficiently move data in and out of the system.

1.10.1 CSV Import □ NEW

1.10.1.1 Output Import **When to use:** - Importing many outputs at once - Migrating from other systems - Updating multiple outputs - Annual import of publications

Process:

1. **Prepare Data**:
   - Go to Outputs → Import
   - Download CSV template
   - Fill in required columns
   - Save as UTF-8 CSV
2. **Required Columns**:
   - title
   - all_authors
   - publication_venue
   - publication_type
   - publication_date (YYYY-MM-DD)
   - quality_rating (4, 3, 2, 1, or 0 for unclassified)
   - author_email (links to colleague)
   - uoa
   - ref_eligible (true/false)
3. **Optional Columns**:
   - doi
   - url
   - volume, issue, pages
   - keywords
   - abstract
   - notes
4. **Upload**:
   - Choose your CSV file
   - Click "Upload and Validate"
   - System checks data
5. **Validation**:
   - Checks required fields
   - Validates dates and ratings
   - Matches email to colleagues
   - Detects duplicate titles/DOIs
   - Shows error report if issues
6. **Review**:
   - See what will be imported
   - Check colleague matches
   - Review any warnings
   - Check duplicate detection
7. **Import**:
   - Click "Confirm Import"

- Outputs created
- Success summary shown
- Error log if any issues

CSV Tips: - Use template - exact column names required - UTF-8 encoding essential - Test with 2-3 rows first - External co-authors auto-categorized as "Co-author (External)" - Empty cells okay for optional fields - Dates must be YYYY-MM-DD format - Quality ratings: 4, 3, 2, 1, or 0 - Boolean fields: true/false (lowercase)

1.10.1.2 Colleague Import

Process similar to outputs: - Download colleague template - Fill in colleague data - Include employment status and category NEW - Upload and validate - Review matches - Confirm import

Special handling: - Duplicate detection by email - Auto-links to User accounts if exist - Creates new users if needed - Can update existing colleagues

1.10.2 Excel Export NEW

1.10.2.1 Assignment Export with Links

Perfect for: - Distributing papers to reviewers - Progress tracking - Meeting preparation - Email communication

Export Options:

1. Critical Friends Assignments: - Yellow highlighted - External reviewer information - Paper links - Due dates and priorities

2. Internal Panel Assignments: - Blue highlighted - Internal reviewer information - Paper links - Status and ratings

3. Combined Export: - Both types color-coded - Complete overview - Workload comparison

Export Process:

1. Go to **Export** → **"Assignments"**
2. Set filters:
    - **Reviewer Type**: Internal/Critical Friends/Both
    - **Specific Reviewer**: (optional)
    - **Author**: (optional)
    - **Status**: (optional)
3. Click **"Export to Excel"**
4. File downloads automatically

Excel Features: - **Clickable PDF Links**: Direct access to papers - **Color Coding**: - Light Blue: Internal Panel - Light Yellow: Critical Friends - **Frozen Header**: Easy scrolling - **Formatted Columns**: Professional appearance - **Complete Information**: - Reviewer name and email - Output title - Author - Quality rating - Review status - Due date - Priority - PDF link - Notes

Using the Export:

Scenario 1: Email to Single Reviewer

```
1. Export filtered by specific reviewer
2. Reviewer sees only their assignments
```

```
3. Click links to access papers
4. Send via email with instructions
```

Scenario 2: Team Meeting

```
1. Export all assignments
2. Show on projector/screen
3. Discuss progress
4. Identify bottlenecks
5. Assign new reviews
```

Scenario 3: Progress Report

```
1. Export by status (completed)
2. Show completion rates
3. Calculate review times
4. Identify trends
5. Report to management
```

1.10.3 Other Export Options

1.10.3.1 Output Export

CSV Export: - All output data - Custom field selection - Filtered export - Date range export

Process: 1. Go to Outputs 2. Apply filters 3. Click "Export CSV" 4. Opens in Excel

1.10.3.2 Colleague Export

Export Types: - Current staff list - Former staff list - Category breakdown - Output statistics

Format: CSV

1.10.3.3 Report Export

LaTeX/PDF Reports: - Submission overview - Quality profile - Staff progress - Review status - Comprehensive report

Process: 1. Go to Reports 2. Select report type 3. Choose format (LaTeX/Article/Report/Beamer) 4. Generate 5. Download

1.10.4 Import/Export Best Practices

1. **Regular Exports**: Weekly backups
2. **Test Imports**: Small batches first
3. **Clean Data**: Remove special characters
4. **UTF-8 Encoding**: Always
5. **Template Use**: Don't create from scratch
6. **Validation**: Check import results
7. **Backup First**: Before bulk import
8. **Documentation**: Keep import logs
9. **Excel for Distribution**: Use export feature NEW
10. **CSV for Migration**: Bulk data movement

1.11 □ Report Generation

Create professional reports for stakeholders.

1.11.1 Available Reports

1.11.1.1 1. Submission Overview

Contents: - Total outputs by UoA - Quality profile breakdown - Staff contribution summary - Timeline and milestones - Key statistics

Best for: - Department meetings - Progress updates - Management reporting

1.11.1.2 2. Quality Profile Analysis

Contents: - Detailed quality breakdown - Comparison to targets - Trend analysis - Recommendations - Critical concerns

Best for: - Strategy meetings - Quality improvement - REF preparation

1.11.1.3 3. Staff Progress Report

Contents: - Individual staff contributions - Required vs. actual outputs - Quality by staff member - Productivity analysis - Staff categories breakdown □ NEW

Best for: - Performance reviews - Resource allocation - Staff development

1.11.1.4 4. Review Status Report

Contents: - Internal panel progress - Critical friends status - Pending reviews - Completed reviews - Turnaround times

Best for: - Review coordination - Deadline management - Workload balancing

1.11.1.5 5. Comprehensive Report

Contents: - ALL of the above combined - Executive summary - Detailed analysis - Appendices - Complete data

Best for: - Final submission - External audits - Complete overview

1.11.2 Report Formats

LaTeX Source (.tex) - Editable source file - Compile with xelatex/pdflatex - Customize styling - Add institution branding

PDF (via LaTeX) - Professional appearance - Ready to distribute - Print-ready - Includes graphics

Document Styles: 1. **Article**: Standard academic article format 2. **Report**: Multi-chapter report format 3. **Beamer**: Presentation slides

1.11.3 Generating Reports

Process:

1. Go to **Reports**
2. Click **"Generate Report"**
3. Select **Report Type**
4. Choose **Format**:
   - LaTeX Source
   - PDF (requires LaTeX)
   - Beamer Presentation
5. Set **Options**:
   - Date range
   - Include/exclude sections
   - Filtering options
6. Click **"Generate"**
7. Download when ready

1.11.4 Report Customization

LaTeX reports can be customized: - Institution logo - Color scheme - Header/footer - Section ordering - Chart styles - Data included

Edit the .tex file: - Change title and author - Add/remove sections - Adjust formatting - Include additional analysis

Compile:

```
xelatex report.tex
xelatex report.tex  # Second run for TOC
```

1.11.5 Report Best Practices

1. **Regular Generation**: Monthly reports
2. **Archive Reports**: Keep version history
3. **Customize**: Add institution branding
4. **Review Before Sharing**: Check for errors
5. **PDF for Distribution**: Most compatible
6. **LaTeX for Editing**: More flexibility
7. **Beamer for Presentations**: Quick slides
8. **Data Quality**: Ensure data current first

1.12 □ Best Practices

1.12.1 Data Quality

1. **Complete Information**: Fill all fields
2. **Accurate Dates**: Check publication dates

3. **Verified Links**: Test DOI and URLs
4. **Current Status**: Update employment promptly
5. **Consistent Categories**: Use categories correctly
6. **Quality Evidence**: Document rating decisions

1.12.2 Workflow Efficiency

1. **Use CSV Import**: For bulk operations
2. **Excel Export**: For reviewer distribution □ NEW
3. **Dashboard Daily**: Check each morning
4. **Task Management**: Track all activities □ NEW
5. **Regular Updates**: Keep data current
6. **Batch Operations**: Group similar tasks

1.12.3 Quality Assurance

1. **Internal First**: Always review internally before external
2. **Multiple Opinions**: Get several reviews per output
3. **Panel Meetings**: Regular discussion of ratings
4. **Documentation**: Record all decisions
5. **Consistency**: Apply criteria uniformly
6. **Evidence-Based**: Use citations, rankings

1.12.4 Team Coordination

1. **Clear Roles**: Define responsibilities
2. **Regular Meetings**: Weekly or bi-weekly
3. **Communication**: Keep team informed
4. **Task Assignment**: Use task system □ NEW
5. **Progress Tracking**: Monitor dashboards
6. **Feedback Loop**: Learn and improve

1.12.5 Data Management

1. **Regular Backups**: Daily database backups
2. **Version Control**: Track changes
3. **Access Control**: Appropriate permissions
4. **Data Validation**: Check imports carefully
5. **Archive Old Data**: Keep system fast
6. **Export Regularly**: Multiple backup formats

1.12.6 Security

1. **Strong Passwords**: Enforce policy
2. **Regular Updates**: Keep Django current
3. **Access Logs**: Monitor usage

4. **HTTPS**: Use SSL in production
5. **Backup Security**: Encrypt backups
6. **User Training**: Security awareness

1.13 ❓ Frequently Asked Questions

1.13.1 General Questions

Q: What's the difference between Internal Panel and Critical Friends? A: Internal Panel are university staff reviewing internally. Critical Friends are external reviewers from other institutions. Use Internal Panel for first review and quality assurance, Critical Friends for external validation.

Q: Should I delete former staff? A: NO! Mark them as "Former" instead. This preserves their outputs and contribution history while removing them from active dropdowns.

Q: What's the difference between colleague categories? A: Categories identify research roles: Independent researchers can submit independently, Non-independent (like post-docs) may have different rules, External co-authors are from other institutions. Choose the category that best describes their status for REF purposes.

Q: How often should I back up? A: Daily for production systems. Weekly minimum for development. Use automated backup scripts.

1.13.2 Output Management

Q: What if an output has multiple authors from our department? A: Select the lead author in the "Author" field. All authors are listed in "All Authors" field. The lead author gets credit for required output calculation.

Q: Can I change quality ratings later? A: Yes! Ratings can be updated as you get more reviews and information. Track the reasons for changes.

Q: What if I don't know the quality rating yet? A: Use "Unclassified" initially. Update after internal and external reviews.

Q: How do I handle a book with multiple chapters? A: Each chapter can be a separate output if eligible. Or treat the whole book as one output. Follow REF guidelines for your discipline.

1.13.3 Import/Export 🆕 NEW

Q: Why did my CSV import fail? A: Common issues: - File not UTF-8 encoded - Missing required columns - Invalid dates (use YYYY-MM-DD) - Email doesn't match colleague in system - Special characters in data

Q: Can I update existing outputs via CSV? A: Yes! If title or DOI matches, you can choose to update existing outputs. Be careful not to overwrite good data.

Q: Why can't I click the links in my exported Excel? A: Links work when PDFs are uploaded and accessible. Check: - PDF was uploaded for that output - You have network access to server - File path is correct

Q: Can I email the Excel export directly to reviewers? A: Yes! That's exactly what it's designed for. Reviewers can click links to access papers directly.

1.13.4 Tasks □ NEW

Q: Should I create a task for every output? A: No. Tasks are for administrative activities, deadlines, meetings, and coordination. Use assignments for output reviews.

Q: Can I assign one task to multiple people? A: Not directly. Create separate tasks or use the description to mention multiple people involved.

Q: What happens to completed tasks? A: They remain in the system for audit trail. Filter by status to hide completed tasks from daily view.

Q: When should I use "Urgent" priority? A: For critical items due today or tomorrow, or things blocking other work. Don't overuse - saves meaning for true urgencies.

1.13.5 Reviews

Q: How many reviews should each output get? A: Recommended: 1-2 internal panel reviews plus 1 external critical friend review. More for borderline cases.

Q: What if internal and external reviews disagree? A: Common! This is why you need both. Panel should discuss, consider evidence, and make final decision. Document reasoning.

Q: How long should reviews take? A: Internal: 1-2 weeks. External: 2-4 weeks. Build in buffer time for delays.

Q: Can Critical Friends see internal reviews? A: No, they're separate systems. Internal reviews inform your decisions, external reviews provide validation. Don't share internal reviews unless you want to.

1.13.6 Technical

Q: What if the server stops? A: If using systemd:

```
sudo systemctl status ref-manager
sudo systemctl restart ref-manager
```

Check logs for errors:

```
sudo journalctl -u ref-manager -n 100
```

Q: How do I add another user? A: Via Django admin:

```
python manage.py createsuperuser
```

Or through admin panel (http://localhost:8000/admin/).

Q: Can I access from multiple computers? A: Yes! If running on a server: 1. Set ALLOWED_HOSTS in .env 2. Run server on 0.0.0.0:8000 3. Access via http://server-ip:8000 For production, use Nginx/Gunicorn setup.

Q: How do I upgrade to a new version? A: 1. Backup database 2. Pull/download new code 3. Run: pip install -r requirements.txt 4. Run: python manage.py migrate 5. Run: python manage.py collectstatic 6. Restart server

1.13.7 Troubleshooting

Q: I can't log in! A: Reset password:

```
python manage.py changepassword yourusername
```

Q: Images/CSS not loading? A: Run:

```
python manage.py collectstatic --noinput
```

Then restart server.

Q: "No such table" error? A: Run migrations:

```
python manage.py migrate
```

Q: Python 3.13 errors? A: v2.0 is compatible with Python 3.13. Update to latest version. If issues persist, convert Decimal to float in calculations (already done in v2.0).

1.14 □ Getting Help

Documentation: - README.md - System overview and installation - QUICK-START-GUIDE.md - 10-minute setup - TECHNICAL-DOCUMENTATION.md - Developer guide - TROUBLESHOOTING.md - Problem solving - CHANGELOG.md - Version history

Support: - System Administrator: [email] - Department IT: [email] - User Community: [forum/chat]

Reporting Issues: Include: - Django version - Python version - Operating system - Error message (full) - Steps to reproduce

Feature Requests: Submit via: - GitHub Issues - Email to admin - Department meetings

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Version: 2.0.0
Last Updated: November 3, 2025
Prepared by: George Tsoulas
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This guide covers all features of REF Manager v2.0. For additional support, refer to other documentation files or contact your system administrator.

1.15 □ Additional Resources

REF Guidelines: - REF 2029 Official Guidance: https://www.ref.ac.uk/ - Panel Criteria and Working Methods - Submission Guidelines - Assessment Framework

Training Materials: - Video tutorials (if available) - Training sessions schedule - Quick reference cards - Workshop materials

Community: - User group meetings - Best practice sharing - Cross-department collaboration - External REF manager network

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Happy REF Managing! □

For the latest updates and detailed technical information, please refer to the complete documentation suite.