

REF-Manager

Research Excellence Framework Submission Management System

Version 3.0.0

Department of Language and Linguistic Science
University of York

November 2024

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	2
2	Key Features	2
2.1	Research Output Management	2
2.2	Multi-Dimensional Quality Assessment	2
2.3	Risk Assessment Framework	2
2.4	Portfolio Optimisation	2
2.5	Role-Based Access Control	3
3	System Requirements	3
4	Quick Installation	3
5	Documentation	3
6	License	4
7	Contact	4

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

- **Email:** george.tsoulas@york.ac.uk
- **GitHub:** <https://github.com/gtsoulas/ref-manager>