

# REF-Manager

User Guide

Version 4.0.0

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## Contents

## 1 Getting Started

### 1.1 Logging In

1. Navigate to your REF-Manager URL
2. Enter your username and password
3. Click **Log In**

### 1.2 User Roles

Role	Description	Capabilities
Administrator	Full access	All features, user management
Observer	Read-only	View all data, export
Internal Panel	Reviewer	Rate assigned outputs
Colleague	Staff member	Manage own outputs

## 2 Managing Outputs

### 2.1 Adding an Output

1. Click **Add Output**
2. Complete the form fields
3. Click **Save**

### 2.2 Publication Types

Code	Type
A	Journal Article
B	Book
C	Book Chapter
D	Conference Paper
E	Patent
F	Software
G	Performance/Exhibition
H	Other

## 3 DOI Auto-Fetch (New in v4.0)

Automatically populate output metadata from a DOI.

### 3.1 Using DOI Auto-Fetch

1. Navigate to **Outputs** → **Add Output**
2. In the **Intelligent Output Entry** section:

- Paste the DOI (e.g., 10.1038/nature12373)
  - Click **Auto-Fill**
3. Review and adjust populated fields
  4. Select the Colleague and add ratings
  5. Click **Save**

### 3.2 Supported DOI Formats

All these formats work:

- 10.1038/nature12373
- doi:10.1038/nature12373
- https://doi.org/10.1038/nature12373

## 4 O/S/R Quality Ratings (New in v4.0)

Three-component quality assessment aligned with REF 2029.

### 4.1 Rating Components

Component	What to Assess
Originality	Innovation, new ideas, novel approaches
Significance	Importance, influence, reach, impact
Rigour	Quality of execution, methodology, evidence

### 4.2 Rating Scale

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

### 4.3 Rating Sources

Each output can receive ratings from three sources:

1. **Internal Panel** (blue card) – Departmental reviewers
2. **Critical Friend** (yellow card) – External reviewers
3. **Self-Assessment** (green card) – Author's evaluation

## 4.4 Entering Ratings

1. Edit an output
2. Scroll to **Quality Ratings (O/S/R)** section
3. Enter decimal values (0.00-4.00) for each component
4. Save

## 5 Open Access Compliance (New in v4.0)

Track REF 2029 Open Access requirements.

### 5.1 OA Status Types

Status	Description
Gold	Published in full OA journal
Green	Available via repository (YORA)
Hybrid	OA article in subscription journal
Bronze	Free to read, no formal license
Closed	Paywalled

### 5.2 Compliance Dates

- **Acceptance Date:** When accepted by journal
- **Deposit Date:** When uploaded to repository
- **Embargo End Date:** When full-text becomes public

### 5.3 3-Month Deposit Rule

REF 2029 requires outputs to be deposited within 3 months (92 days) of acceptance.

- **Compliant:**  $\text{deposit\_date} - \text{acceptance\_date} \leq 92 \text{ days}$
- **Non-compliant:**  $\text{deposit\_date} - \text{acceptance\_date} > 92 \text{ days}$

## 6 REF Narrative Statements (New in v4.0)

### 6.1 Double-Weighting Statement

Required if output is marked as double-weighted.

- **Word Limit:** 300 words
- **Purpose:** Justify why output merits double weighting

### 6.2 Interdisciplinary Statement

Optional for cross-panel outputs.

- **Word Limit:** 500 words
- **Purpose:** Explain cross-panel methodology and value

## 7 Bulk Import (New in v4.0)

Enhanced bulk import with DOI lookup.

### 7.1 Import Modes

Mode	Description
Hybrid	Fetches DOI metadata where available, uses CSV otherwise
Smart	Only imports rows with DOIs
Manual	Uses CSV data directly, no API calls

### 7.2 Running an Import

1. Navigate to **Outputs** → **Bulk Import**
2. Select import mode
3. Upload CSV file
4. Enable options (skip duplicates, auto-link)
5. Click **Start Import**

## 8 Risk Assessment

### 8.1 Risk Levels

Score	Level	Colour	Action
0.00-0.24	Low	Green	Proceed
0.25-0.49	Medium-Low	Yellow	Monitor
0.50-0.74	Medium-High	Orange	Mitigate
0.75-1.00	High	Red	Urgent

## 9 Getting Help

- Check the Troubleshooting guide
- Contact: [george.tsoulas@york.ac.uk](mailto:george.tsoulas@york.ac.uk)
- GitHub: <https://github.com/gtsoulas/ref-manager>