



# EPrints REF Support

## User Guide

April 2018

Version 1.0

This guide covers the web-interface of an EPrints repository. This guide does not refer to the configuration of EPrints using the command line on the server. This user guide is based upon a 'vanilla' installation of the EPrints software using version 3.3.15. Depending on the particular version of EPrints you are running some screens may appear slightly differently.

Whilst every effort has been made to ensure the accuracy of the information supplied herein, EPrints Services & University of Southampton cannot be held responsible for any errors or omissions.

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### 1. Overview

The REF Support plugin has been designed to introduce a number of features to your EPrints repository to support your REF2021 submission. It has been adapted from the previous REF2014 plugin to both suit the requirements for the new REF exercise, and to integrate with the REF Compliance Checker plugin. With this plugin installed (subject to pre-requisites), you will be able to use your EPrints repository to collate your REF1 and REF2 data to contribute to your REF2021 submission. The plugin's features, summarised below, enable you to run trials of your submission as well as delegate access to champions to manage and oversee submissions.

#### Summary of core features

##### Benchmarks

Benchmarks allow you to conduct one or more trial runs as well as the final run of your REF2021 submission exercise. New benchmarks can be started from scratch or created containing submissions made in a previous benchmark. As new benchmarks are added, previous benchmarks are saved and provide a frozen view of your submission exercise that you can refer back to a compare results.

##### Assign Unit of Assessment Champions

The Repository Administrator can assign individual staff as a champion of one or more unit of assessment panels defined by HEFCE for REF2021. This allows the Champion to oversee their allocated units, enabling them to check and verify the outputs selected by staff, or submit outputs on their behalf if they so wish.

Champions may run REF1 or REF2 reports at any time for their Unit/s of Assessment for the current or previous benchmark.

**To select Unit of Assessment Champions, a user must first be assigned the 'ref/select\_champions' role (see section 2.1 for more information).**

##### REF1 Profile Information

Staff identified as taking part in your REF2021 submission will have an enhanced profile, where REF1 data can be provided. This information will be used to generate the REF1 report.

Staff may be allocated to one Unit of Assessment, enabling them to make submissions to that panel specifically.

##### Identify REF2 Outputs

Staff identified as taking part in your REF2021 submission will be able to select their research outputs to be submitted to their assigned assessment panel. Additional REF2 data can be provided against each selection, including a self-rating and additional information for the panel to consider.

**In order to make a selection, a user must first be assigned the 'ref/select' role (see section 2.1 for more information).**

## 2. Getting Started

Once the REF Support plugin is installed on your EPrints Repository, you must complete the following set-up tasks in order to utilise the REF Support features.

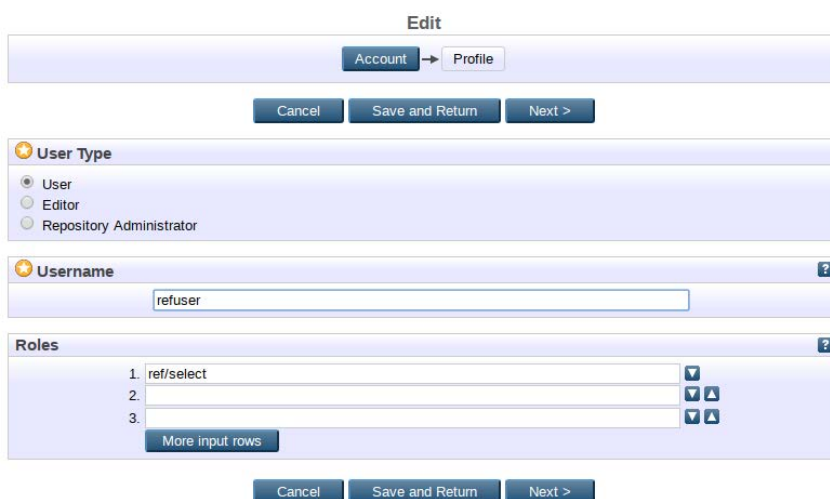
### 2.1 Additional Roles

Relevant repository user accounts will need additional roles assigned to be able to access the screens within the REF Support plugin. Assign the two roles below as described:

Role	for Administrators	for Staff
<b>ref/select_champions</b>	✓ Required against an Administrator account to be able to identify members of staff as champions.	✗
<b>ref/select</b>	✗	✓ Required against those staff accounts (including champions) needing to be able to access REF screens and to make REF submissions

These additional roles can be added by Repository Administrators to appropriate user accounts, using the 'Administer Account' feature.

*Additional role of 'ref/select' being added for a staff user taking part in REF via the 'Account' stage of the edit user screen.*



The screenshot shows the 'Edit' user account interface. At the top, there are tabs for 'Account' and 'Profile', with 'Account' selected. Below the tabs are buttons for 'Cancel', 'Save and Return', and 'Next >'. The main content area is divided into sections: 'User Type' with radio buttons for 'User' (selected), 'Editor', and 'Repository Administrator'; 'Username' with a text field containing 'refuser'; and 'Roles' with a list containing '1. ref/select', '2.', and '3.', each with up/down arrow controls. A 'More input rows' button is at the bottom of the roles list. At the very bottom of the form are buttons for 'Cancel', 'Save and Return', and 'Next >'.

### 2.2 Identify unit of assessment champions

You must identify your unit of assessment (UoA) champions who will then be able to oversee and verify submissions to their assigned assessment panels.

Follow instructions in Section 5.3 to complete this task.

### **2.3 Assign staff to their unit of assessment and populate REF1 profile information**

You must identify the staff involved in REF2021 who will be submitting research outputs by assigning them to a single Unit of Assessment panel. Should you choose to use your EPrints repository to produce your REF1 report you will also need to update staff profiles with the relevant REF1 information.

Follow instructions in Section 5.1 to complete this task.

### **2.4 Create the first current benchmark**

You must have one current benchmark set up for staff and champions to be able to make submissions against and run associated reports.

Follow instructions in Section 5.4.1 and 5.4.2 to complete this task.

### 3. REF Screens & Features for Staff

The following sections describe the key screens and features available in the REF2021 plugin for staff users of the repository taking part in the REF2021 submission. In order to access these features, staff must have the correct role assigned as described in Section 2, Getting Started – namely they must have a ‘ref/select’ role and have a Unit of Assessment assigned to them.

#### 3.1 REF Screen Summary

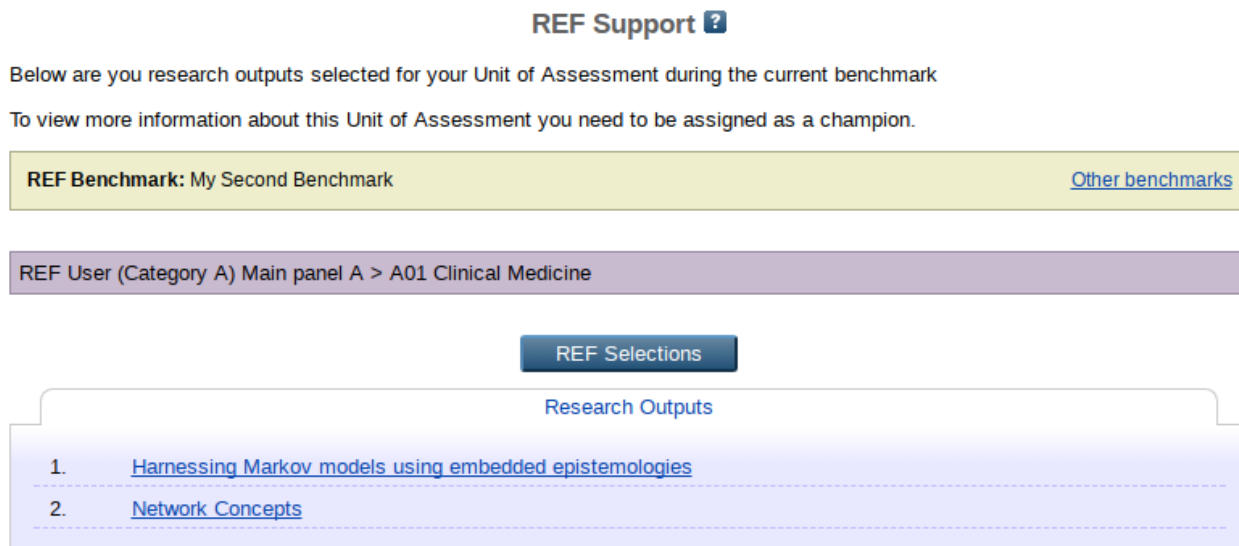
Login to the system and you will find an additional link ‘REF Support’ is available on the toolbar, click on this link to access REF Features as a staff user.



The screen displays an overview of the REF submission for the user. The first box displays the benchmark, and a link ‘Other benchmarks’ that allows the user to view their REF submissions for previous benchmarks.

This is followed by another box, displaying the user’s unit of assessment

Finally, there is a button labelled ‘REF Selections’ and a tab displaying ‘Research Outputs’ displaying records that have already been selected for this user.

A screenshot of the REF Support screen. At the top, there is a header 'REF Support ?'. Below it, there is a paragraph: 'Below are you research outputs selected for your Unit of Assessment during the current benchmark' and 'To view more information about this Unit of Assessment you need to be assigned as a champion.' The main content area is divided into three sections: 1. A yellow box containing 'REF Benchmark: My Second Benchmark' and a link 'Other benchmarks'. 2. A purple box containing 'REF User (Category A) Main panel A > A01 Clinical Medicine'. 3. A blue box containing a 'REF Selections' button and a 'Research Outputs' tab. Below the tab, there is a list of two items: 1. 'Harnessing Markov models using embedded epistemologies' and 2. 'Network Concepts'.

Clicking the ‘REF Selections’ button takes the user to a new screen from which they can search for records and add them to their REF submission for this benchmark.

## REF Selections

REF Benchmark: My Second Benchmark

[Other benchmarks](#)

REF User (Category A) Main panel A &gt; A01 Clinical Medicine

## Selections

- |  |  |  |
|--|--|--|
| 1.   | <a href="#">Harnessing Markov models using embedded epistemologies</a> | <a href="#">Deselect</a><br><a href="#">Add Info</a> |
| <hr style="border-top: 1px dashed #ccc;"/> |  |  |
| 2.   | <a href="#">Network Concepts</a>                                       | <a href="#">Deselect</a><br><a href="#">Add Info</a> |

## Add Selections

Please find below the list of \*all\* the items you have deposited. [\[view other options\]](#)

Displaying results 1 to 7 of 7.

[New search](#)Order the results: by year (most recent first) ▼ Reorder

- |    |  |                        |                     |
|----|--|------------------------|---------------------|
| 1. | ● <a href="#">Fyson, RW (2018) <i>Network Concepts</i>. Journal.</a>   |                        | Already Selected    |
| 2. | ● <a href="#">Fyson, Richard William, Bradley, J and Carr, L (2018) <i>Observations on the Black Wood Turtle</i>. Journal.</a> | Selected by: Test User | <a href="#">Add</a> |
| 3. | ● <a href="#">Fyson, RW (2017) <i>Harnessing Markov models using embedded epistemologies</i>. journal.</a>                     |                        | Already Selected    |
| 4. | ● <a href="#">Fyson, RW and Carr, L (2017) <i>Migration routes of the Plains Zebra</i>. Journal, 12 (45). pp. 78-89.</a>       |                        | <a href="#">Add</a> |
| 5. | ● <a href="#">Fyson, RW (2017) <i>Green Basilisks in Captivity</i>. In: UNSPECIFIED.</a>                                       |                        | <a href="#">Add</a> |
| 6. | ● <a href="#">Fyson, RW (2017) <i>Red-rumped Caciques in Myth and Legend</i>. [Artefact]</a>                                   |                        | <a href="#">Add</a> |
| 7. | ● <a href="#">Fyson, RW (2016) <i>Mating rituals of the Spotted Turtle</i>. Journal.</a>                                       |                        | <a href="#">Add</a> |

Displaying results 1 to 7 of 7.

[New search](#)Order the results: by year (most recent first) ▼ Reorder

### 3.2 Search & identify a research output as your REF submission

Publications can be searched for by using one of the pre-defined searches for your own/co-authored publications, or using the open advanced search option:

#### Add Selections

Please find below the list of \*all\* the items you have deposited. [\[view other options\]](#)

Select an option below:

- [items you have co-authored from 2014 onwards \(unless REF CC excluded\)](#)
- [\\*all\\* the items you have co-authored](#)
- [items you have deposited from 2014 onwards \(unless REF CC excluded\)](#)
- [Blank search form](#)



Once a search has been carried out, the results will display as follows:

**Add Selections**

Please find below the list of \*all\* the items you have deposited. [\[view other options\]](#)

Displaying results 1 to 7 of 7.  
[New search](#)

Order the results: by year (most recent first) ▼ Reorder

1.	●	Fyson, RW (2018) <a href="#">Network Concepts</a> . Journal.	Already Selected
2.	●	Fyson, Richard William, Bradley, J and Carr, L (2018) <a href="#">Observations on the Black Wood Turtle</a> . Journal.	Selected by: Test User <a href="#">Add</a>
3.	●	Fyson, RW (2017) <a href="#">Harnessing Markov models using embedded epistemologies</a> . journal.	Already Selected
4.	●	Fyson, RW and Carr, L (2017) <a href="#">Migration routes of the Plains Zebra</a> . Journal, 12 (45). pp. 78-89.	<a href="#">Add</a>
5.	●	Fyson, RW (2017) <a href="#">Green Basilisks in Captivity</a> . In: UNSPECIFIED.	<a href="#">Add</a>
6.	●	Fyson, RW (2017) <a href="#">Red-rumped Caciques in Myth and Legend</a> . [Artefact]	<a href="#">Add</a>
7.	●	Fyson, RW (2016) <a href="#">Mating rituals of the Spotted Turtle</a> . Journal.	<a href="#">Add</a>

Displaying results 1 to 7 of 7.  
[New search](#)

Order the results: by year (most recent first) ▼ Reorder

Next to each citation is an indicator showing the item’s REF compliance status as per the REF Compliance Checker. A green icon indicates the record is compliant, a red one indicates not compliant, and blue indicates the record pre-dates the compliance requirements.

Research outputs can be added to your submission list by clicking the associated ‘Add’ link. Where an item has already been selected, the name of the selectors will also display (there may be more than one person who has selected it).

The selections list at the top of the screen will be immediately updated to reflect the new selection.

**3.3 Rate and qualify selections**

Once an item has been selected for submission, additional REF2 information can be provided. Click on ‘Add Info’ link next to the chosen output and you will be presented with the additional REF2 information screen.

**REF Selections**

REF Benchmark: My Second Benchmark [Other benchmarks](#)

REF User (Category A) Main panel A > A01 Clinical Medicine

**Selections**

1.	<a href="#">Harnessing Markov models using embedded epistemologies</a>	<a href="#">Deselect</a> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;"><a href="#">Add Info</a></span>
2.	<a href="#">Network Concepts</a>	<a href="#">Deselect</a> <a href="#">Add Info</a>

This page will enable you to provide the following additional information, in order to rate and qualify the submission and support your submission to HEFCE:

- Self-rating of the research output
- Addition details to be presented and considered by the panel members
- The type of output this is (If a selection is not made here, the REF2 report will use the value stored against the EPrint record)
- Weighting
- Whether the output is interdisciplinary research
- Request for cross-referral to another panel
- English abstract for items where the abstract is not currently provided in English.

Information provided here will be presented in the REF2 report.

### 3.4 Remove a selection from your submission list

Against all existing selections you will find a 'Deselect link as shown below:

**REF Selections**

REF Benchmark: My Second Benchmark [Other benchmarks](#)

REF User (Category A) Main panel A > A01 Clinical Medicine

**Selections**

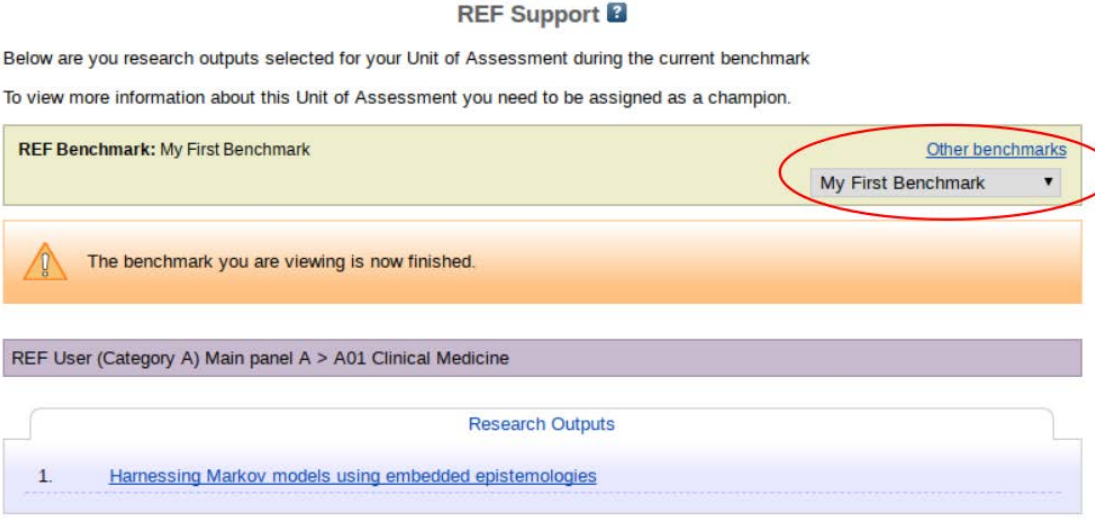
1.	<a href="#">Harnessing Markov models using embedded epistemologies</a>	<a href="#">Deselect</a> <a href="#">Add Info</a>
2.	<a href="#">Network Concepts</a>	<a href="#">Deselect</a> <a href="#">Add Info</a>

To remove a selection, simply click on the 'Deselect' link next to the chosen research output.

**Note:** there is no confirmation step, the selection is immediately removed.

### 3.5 View submissions from a previous benchmark

By default, the main REF screen will show information associated with the current benchmark (set by repository administrators) being run in the repository (this could be your final REF submission or perhaps a trial run). If a “trial run” or benchmark exercise has previously been run, selections from that benchmark can be viewed by selecting the appropriate benchmark from the drop-down list.



The screenshot shows the 'REF Support' interface. At the top, it says 'REF Support' with a help icon. Below that, it states: 'Below are your research outputs selected for your Unit of Assessment during the current benchmark. To view more information about this Unit of Assessment you need to be assigned as a champion.' There is a green box containing 'REF Benchmark: My First Benchmark' and a dropdown menu currently set to 'My First Benchmark'. A red circle highlights the dropdown menu. To the right of the dropdown is a link for 'Other benchmarks'. Below this is an orange warning box with a triangle icon and the text: 'The benchmark you are viewing is now finished.' Underneath is a purple breadcrumb trail: 'REF User (Category A) Main panel A > A01 Clinical Medicine'. At the bottom, there is a section titled 'Research Outputs' with a list item: '1. [Harnessing Markov models using embedded epistemologies](#)'.

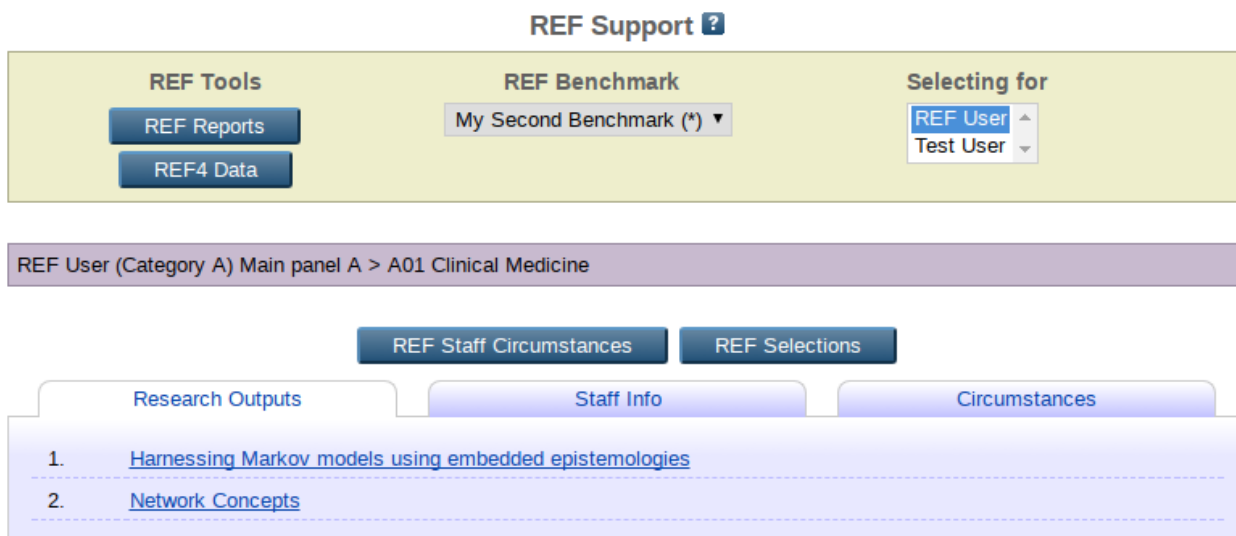
The page will refresh automatically to show the outputs submitted for that benchmark. No changes may be made to submissions against previous benchmarks.

## 4. REF Screens & Features for Unit of Assessment Champions

The following sections describe the key screens and features available in the REF Support plugin for staff users assigned as Unit of Assessment Champions (see Section 1). In order to access these features, staff must have the correct role assigned as described in Section 2, Getting Started and have been allocated to one or more Units of Assessment (see Section 5) by the Repository Administrator.

### 4.1 REF Screen Summary

The following REF screen has a number of different options available, the majority of which are shared with the screen available to a member of staff. Champions however are able to select and see any member of staff assigned to their area of responsibility to see and update their submissions.



The screenshot shows the REF Support interface. At the top, there is a header "REF Support ?". Below this, there are three main sections: "REF Tools" with buttons for "REF Reports" and "REF4 Data"; "REF Benchmark" with a dropdown menu showing "My Second Benchmark (\*)"; and "Selecting for" with a dropdown menu showing "REF User" and "Test User". Below these sections, there is a breadcrumb trail: "REF User (Category A) Main panel A > A01 Clinical Medicine". Underneath the breadcrumb, there are two buttons: "REF Staff Circumstances" and "REF Selections". Below these buttons, there are three tabs: "Research Outputs", "Staff Info", and "Circumstances". The "Research Outputs" tab is active, showing a list of two items: "1. [Harnessing Markov models using embedded epistemologies](#)" and "2. [Network Concepts](#)".

### 4.2 Oversee unit of assessment panel submissions

Using the 'Selecting for' option at the top of the overview screen, Unit of Assessment Champions may select any member of staff within their assigned areas of responsibility, and may view, select and update selections on their behalf. The REF Support features a Champion shares with a standard staff user are:

- Search & add a research output to the submission list - see Section 3.2 for details
- Rate and qualify selections - see Section 3.3 for details
- Remove a selection from the submission list - see Section 3.4 for details
- View selections from a previous benchmark - see Section 3.5 for details

### 4.3 View REF reports

Unit of Assessment Champions may run REF1, REF2 or REF4 reports from the main screen based on the currently selected benchmark at any time. These reports will highlight anomalies based on HEFCE criteria for these reports.

Click on the REF Reports button from the main REF screen. You will be presented with options to select a benchmark and report type, along with a list of the units of assessment to which you have been given responsibility, along with how many staff members are assigned to be able to submit to this assessment panel, the number of outputs and the average rating.

### REF Reports

Benchmark: My Second Benchmark (\*) ▼

Report: REF 1a Report ▼

<a href="#">Select all</a> <a href="#">Unselect all</a>	Units of Assessment	Staff	Outputs	Avg. Rating
<input type="checkbox"/>	A01 Clinical Medicine	2	3	0
<input type="checkbox"/>	A02 Public Health, Health Services and Primary Care	0	0	0
<input type="checkbox"/>	A03 Allied Health Professions, Dentistry, Nursing and Pharmacy	0	0	0
<input type="checkbox"/>	A04 Psychology, Psychiatry and Neuroscience	0	0	0
<input type="checkbox"/>	A05 Biological Sciences	0	0	0
<input type="checkbox"/>	A06 Agriculture, Veterinary and Food Science	0	0	0

View Report

You can then select a number of units of a Click on your chosen unit of assessment to view the chosen report.

4.3.1 REF 1a report

REF 1a Report

Benchmark: My Second Benchmark REF Support - CSV

A01 Clinical Medicine

REF User (Category A) Main panel A > A01 Clinical Medicine

**Staff Category:** A  
**HESA Identifier:** HESA ID  
**Staff Identifier:** 2047322  
**Date of Birth:** 24 February 1989  
**Full-time Equivalent:** 1  
**Staff Commencement Date:** 1 August 2017  
**Sensitive:** UNSPECIFIED  
**Early Career Researcher:** No  
**Fixed-term contract:** No  
**Secondment:** No  
**Unpaid leave:** No  
**Non-UK based:** No  
**Circumstance explanation:** UNSPECIFIED ! Missing required field Circumstance explanation

Test User (Category C) Main panel A > A01 Clinical Medicine

**Staff Category:** C  
**HESA Identifier:** UNSPECIFIED  
**Staff Identifier:** UNSPECIFIED ! Missing required field Staff Identifier  
**Date of Birth:** 17 May 1990  
**Full-time Equivalent:** UNSPECIFIED  
**Staff Commencement Date:** 1 April 2018  
**Sensitive:** UNSPECIFIED  
**Early Career Researcher:** No  
**Fixed-term contract:** No  
**Secondment:** No  
**Unpaid leave:** No  
**Non-UK based:** No  
**Circumstance explanation:** UNSPECIFIED

The REF1a report details the REF Staff Information for all users who have been assigned to the given unit of assessment. Where required information is missing, a warning message is displayed.

### 4.3.2 REF 1b report

**REF 1b Report**

Benchmark: **My Second Benchmark**
REF Support - CSV ▾ Export

**A01 Clinical Medicine**

REF User (Category A) Main panel A > A01 Clinical Medicine

**Circumstance:** 1- Early career researcher  
**ECR starts:** 1 March 2018  
**Total period of absence:** 5  
**Number of qualifying periods:** 0  
**Complex output reduction:** 1

Test User (Category C) Main panel A > A01 Clinical Medicine

**Circumstance:** UNSPECIFIED  
**ECR starts:** UNSPECIFIED  
**Total period of absence:** UNSPECIFIED  
**Number of qualifying periods:** UNSPECIFIED  
**Complex output reduction:** UNSPECIFIED

The REF1b report shows the Circumstances information for all users who have been assigned to the unit of assessment.

### 4.3.3 REF 1c report

**REF 1c Report**

Benchmark: **My Second Benchmark**
REF Support - CSV ▾ Export

**A01 Clinical Medicine**

Test User (Category C) Main panel A > A01 Clinical Medicine

**(Cat. C) Employing organisation:** University of Southampton  
**(Cat. C) Job title:** Cat C Job  
**(Cat. C) Explanation:** UNSPECIFIED ! Missing required field (Cat. C) Explanation

The REF1c report displays Cat. C circumstances for any users in the unit of assessment who have fall into Staff Category C. Where require information is missing, a warning is displayed.

#### 4.3.4 REF 2 report

### REF 2 Report

Benchmark: My Second Benchmark

REF Support - CSV ▾

Export

#### A01 Clinical Medicine

REF User (Category A) Main panel A &gt; A01 Clinical Medicine

1. [Harnessing Markov models using embedded epistemologies](#) (10 August 2017)

- ❗ Missing required REF field **doi**
- ❗ Missing required REF field **ISSN**

2. [Network Concepts](#) (1 April 2018)

- ❗ Missing required REF field **doi**
- ❗ Missing required REF field **first\_page**
- ❗ Missing required REF field **ISSN**
- ❗ Missing required REF field **issue**
- ❗ Missing required REF field **Volume**
- ❗ User has 2 selection(s).

Test User (Category C) Main panel A &gt; A01 Clinical Medicine

1. [Observations on the Black Wood Turtle](#) (1 March 2018)

- ❗ Missing required REF field **doi**
- ❗ Missing required REF field **first\_page**
- ❗ Missing required REF field **ISSN**
- ❗ Missing required REF field **issue**
- ❗ Missing required REF field **Volume**
- ❗ User has 1 selection(s).

The REF2 report shows the publications that have been submitted for the unit of assessment, grouped by the users who have made the submissions. The report highlights where required information about the publications is missing.



## 4.3.5 REF 4 report

## REF 4 Report

Benchmark: My Second Benchmark

REF Support - XML ▾

Export

## A01 Clinical Medicine

## Research Doctoral Degrees Awarded

Year	Degrees Awarded
2014-15	10
2015-16	15
2016-17	12
2017-18	15
2018-19	0
2019-20	0

## Research Income

Source: 4. UK central government bodies, local authorities, health and hospital authorities

Year	Research Income
2014-15	500000
2017-18	

Source: 6. EU government bodies

Year	Research Income
2014-15	500000
2017-18	

## Research Income-In-Kind

Source: 15. BIS Research Councils

Year	Research Income-in-kind
2014-15	250000
2017-18	

The REF4 report displays the degrees awarded alongside the income and income-in-kind recorded for the current benchmark, displaying values for each unit of assessment the user is a champion of.

4.4 Edit REF 4 Data

**REF4 Data**

Benchmark: My Second Benchmark (\*) ▼

**A01 Clinical Medicine**

Year	Degrees	Income	Income-In-Kind	Actions
2014-15	10	1000000	250000	<a href="#">Edit</a>
2015-16	15	0	0	<a href="#">Edit</a>
2016-17	12	0	0	<a href="#">Edit</a>
2017-18	15	0	0	<a href="#">Edit</a>
2018-19	0	0	0	<a href="#">Edit</a>
2019-20	0	0	0	<a href="#">Edit</a>

Clicking the 'REF4 Data' button on the REF Support Overview page as a unit of assessment champion will provide an overview of the REF4 data available for that unit of assessment for each academic year. Clicking the 'Edit' link allows the unit of assessment champion to update the REF4 data for a given academic year, and for the currently selected benchmark.

**Edit**

Cancel
Save and Return

**Research Doctoral Degrees Awarded**

**Research Income**

	Source	Value	
1.	6. EU government bodies ▼	<input style="width: 80%;" type="text" value="500000"/>	▼
2.	4. UK central government bodies, local authorities, health and hospital authorities ▼	<input style="width: 80%;" type="text" value="500000"/>	▼ ▲
3.	UNSPECIFIED ▼	<input style="width: 80%;" type="text"/>	▼ ▲

More input rows

**Research Income-in-kind**

	Source	Value	
1.	15. BIS Research Councils ▼	<input style="width: 80%;" type="text" value="250000"/>	▼
2.	UNSPECIFIED ▼	<input style="width: 80%;" type="text"/>	▼ ▲
3.	UNSPECIFIED ▼	<input style="width: 80%;" type="text"/>	▼ ▲

More input rows

Cancel
Save and Return

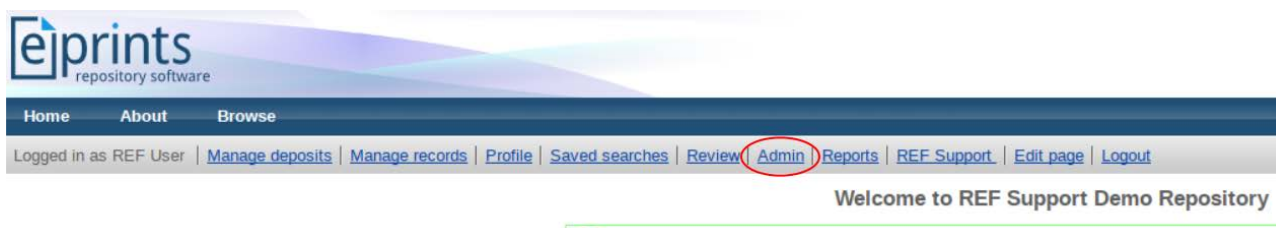
The REF4 Edit screen allows the user to record the number of doctoral degrees awarded. It also allows for both the source and value of research income and research income-in-kind to be recorded.

## 5. REF Screens & Features for Administrators

The following sections describe the key screens and features available in the REF Support plugin for Repository Administrators. In order to access these features, Administrators must have additional roles assigned as described in Section 2.

### 5.1 Assign staff to a unit of assessment & update their REF1 data

Firstly search for the member of staff you wish to allocate a unit of assessment to and/or update their REF1 data for, by opening the main repository administration page:



Use the existing 'Search Users' feature and run a search for the staff member you are looking for. Open their profile page:



Two additional buttons will appear on the staff members profile screen providing access to:

**REF Staff Information (REF1)** – where you can provide REF1 data and allocate a Unit of Assessment (UoA)

**REF Staff Circumstances** – where you can provide REF1b data concerning individual staff circumstances

**Assign as REF UoA Champion** – to assign this user as a UoA Champion of one or more areas

Click on the 'REF Staff Information (REF1)' button.

**Users - Test User**  
<http://git.dev.ac.uk/id/user/2>

Edit Destroy REF Staff Information (REF1) REF Staff Circumstances Assign as REF UoA Champion

Details User History

Account Edit

**Username:** epservices

**User Type:** User

**Unspecified fields:** [Roles](#)

---

Profile Edit

This page can be used to provide all/some of the REF1 data on this user as well as to assign this user to a Unit of Assessment (only one UoA selection may be made).

**REF Staff Information (REF1) - Test User**

Cancel Save and Return

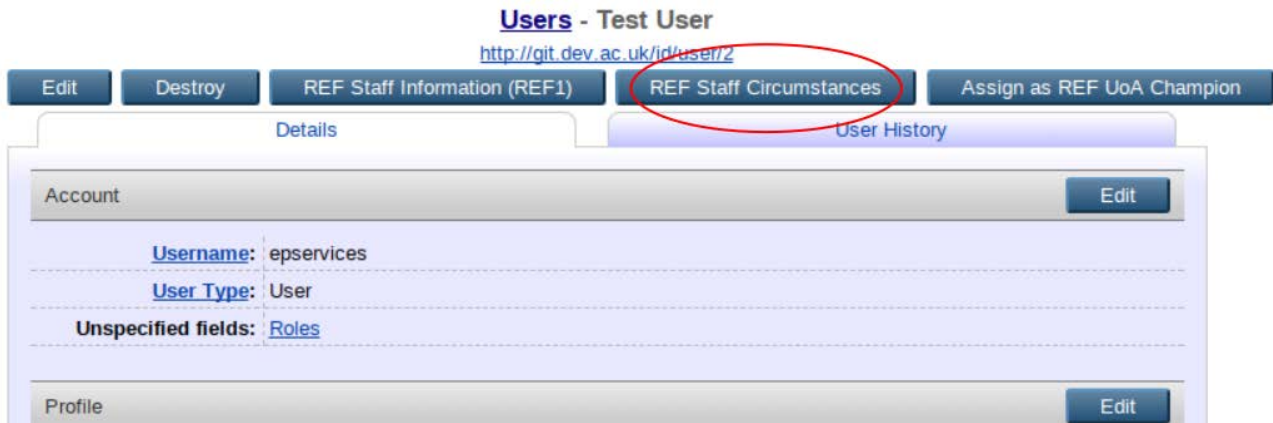
**Research Excellence Framework**

<b>Date of Birth:</b>	The person's date of birth. Year: <input type="text" value="1990"/> Month: <input type="text" value="May"/> Day: <input type="text" value="17"/>
<b>HESA Identifier:</b>	The researcher's unique Higher-Education Statistics Agency (HESA) identifier. <input type="text" value="12345678"/>
<b>Staff Identifier:</b>	<input type="text" value="test1"/>
<b>Staff Category:</b>	The staff category of the staff member <input type="text" value="UNSPECIFIED"/> A C
<b>Staff Commencement Date:</b>	Staff Commencement Date Year: <input type="text" value="2018"/> Month: <input type="text" value="April"/> Day: <input type="text" value="01"/>
<b>Full-time Equivalent:</b>	The FTE of the staff member as a fraction between 0 and 1. <input type="text" value="1"/>
<b>Unit of Assessment (REF2021):</b>	Please select your Unit of Assessment. <input type="text" value="Main panel A: A01 Clinical Medicine"/> ----- UNSPECIFIED Main panel A: A02 Public Health, Health Services and Primary Care Main panel A: A03 Allied Health Professions, Dentistry, Nursing and Pharmacy Main panel A: A04 Psychology, Psychiatry and Neuroscience Main panel A: A05 Biological Sciences Main panel A: A06 Agriculture, Veterinary and Food Science Main panel B: B07 Earth Systems and Environmental Sciences Main panel B: B08 Chemistry

## 5.2 Update staff circumstances data (REF1b)

Repeat Steps 1 – 2 from Section 5.1 to find the user whose REF1b staff circumstances you wish to update and open their profile page.

An additional button 'REF Staff Circumstances' button is now available to update this user's individual staff circumstances.



**Users - Test User**  
<http://git.dev.ac.uk/id/user/2>

Edit Destroy REF Staff Information (REF1) **REF Staff Circumstances** Assign as REF UoA Champion

Details User History

Account Edit

**Username:** epservices

**User Type:** User

**Unspecified fields:** [Roles](#)

Profile Edit

Once selected, details concerning the staff members REF1b circumstances data may be updated.

REF Staff Circumstances - Test User

Cancel Save and Return

REF - Staff Circumstances	
<b>Circumstance:</b>	<div style="border: 1px solid gray; padding: 5px;">                     UNSPECIFIED                      1- Early career researcher                      2- Part-time, career break or secondment                      3- Qualifying period of maternity, paternity or adaption leave                      4- Period of additional paternity or adoption leave under four months                      5- Category A junior clinical academic                      6- Category C clinical, health or veterinary professional                      7- Complex circumstances                 </div>
<b>Circumstance explanation:</b>	<div style="border: 1px solid gray; height: 100px;"></div>
<b>Early Career Researcher:</b>	<input checked="" type="checkbox"/>
<b>ECR starts:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Fixed-term contract:</b>	<input type="checkbox"/>
<b>Contract starts:</b>	Year: <input type="text" value="2018"/> Month: <input type="text" value="April"/> Day: <input type="text" value="01"/>
<b>Contract ends:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Secondment:</b>	<input type="checkbox"/>
<b>Secondment starts:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Secondment ends:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Unpaid leave:</b>	<input type="checkbox"/>
<b>Unpaid leave starts:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Unpaid leave ends:</b>	Year: <input type="text"/> Month: <input type="text" value="Unspecified"/> Day: <input type="text" value="?"/>
<b>Research fellow:</b>	<input type="checkbox"/>
<b>Non-UK based:</b>	<input type="checkbox"/>

### 5.3 Assign Unit of Assessment (UoA) Champion

Repeat Steps 1 – 2 from Section 5.1 to find the user you wish to allocate UoA Champion rights to and open their profile page.

An additional button ‘Assign as REF UoA Champion’ is now available to identify this user as a Champion for one or more Units of Assessment. Click on this button.

**Users - Test User**  
<http://git.dev.ac.uk/id/user/2>

[Edit](#)
[Destroy](#)
[REF Staff Information \(REF1\)](#)
[REF Staff Circumstances](#)
[Assign as REF UoA Champion](#)

[Details](#)
[User History](#)

Account [Edit](#)

**Username:** epservices

**User Type:** User

**Unspecified fields:** [Roles](#)

---

Profile [Edit](#)

Select one or more panels of the Unit of Assessment that this person is to be a Champion for. In this example, we are allocating REF User to all *Main panel B* areas:

**Assign as REF UoA Champion**

[Cancel](#)
[Save and Return](#)

**Research Excellence Framework**

Select the Unit(s) of Assessment that this user will be responsible for.

Unit of Assessment scope:	Unit of Assessment
	Main panel A: A06 Agriculture, Veterinary and Food Science
	Main panel B: B07 Earth Systems and Environmental Sciences
	Main panel B: B08 Chemistry
	Main panel B: B09 Physics
	Main panel B: B10 Mathematical Sciences
	Main panel B: B11 Computer Science and Informatics
	Main panel B: B12 Engineering
	Main panel C: C13 Architecture, Built Environment and Planning
	Main panel C: C14 Geography and Environmental Studies
	Main panel C: C15 Archaeology

To confirm the selections, click on 'Save and Return'.

This user will now be able to oversee the REF submissions made by staff to these areas.

## 5.4 Manage Benchmarks

Benchmarks enable you to conduct one or many trial runs of your REF2021 submission before conducting the final submission exercise.

### 5.4.1 Create a benchmark

To add a new benchmark, log in to your repository and click on the 'Manage Records' link in the main toolbar, followed by the 'REF Benchmarks' link. Alternatively, if you are also a Unit of Assessment champion, click the 'Manage Benchmarks' button on the REF Support overview screen.

**Manage records**

- Eprints:** Used to store eprints records
- Tasks:** Scheduled tasks for the indexer process.
- Files:** Technical data on files stored.
- Imports:** Stores the details of an import.
- REF Benchmarks:** Manages Benchmarks for REF.
- REF Part 4 Environment Data:** Manages the REF Part 4 Environment data
- Saved Searches:** Used to store what searches users have and the frequency of alert emails
- Subjects:** Used to store the hierarchical subject tree(s)
- Users:** Used to store info on eprints users

The 'Manage REF Benchmarks' screen will display the available benchmarks.

**Manage REF Benchmarks**

Select Current Benchmark    Create Benchmark

**Filter**

Name of benchmark	Date of creation	Valid until	Current benchmark	Description
My First Benchmark	6 April 2018	UNSPECIFIED	No	UNSPECIFIED
My Second Benchmark	23 February 2018	UNSPECIFIED	Yes	UNSPECIFIED

Benchmark ID    Add Column

To create a new benchmark, click on the 'Create Benchmark' button at the top of the page.

You will now be able to select from one of the following options to create your new benchmark:

- Create an empty benchmark – provide a unique name, description and date of when the benchmark is valid until (this is for information purposes only)
- Create a copy of an existing benchmark – this will make a copy of the 'current' benchmark, copying across the REF2 selections from the existing benchmark, you may then provide a unique name, description and date of when the new benchmark is valid until (this is for information purposes only)

**Important:** After creating your first benchmark, it will not be assumed that this is 'current'. You must explicitly select this if required (see Section 5.3.2).



#### 5.4.2 Set the current benchmark

Click on the 'Select Current Benchmark' button at the top of the screen.


Select which of the available benchmarks is the 'current' benchmark that staff will submit against, and click on the 'Select' button to save your selection.

#### Select Current Benchmark


- My Second Benchmark
- My First Benchmark

The 'current' benchmark will now be displayed by default to all staff identified as taking part in your REF submission.

#### 5.4.3 Edit a benchmark

Click on the  next to the benchmark you wish to edit you will be able to update the unique benchmark name, description and date the benchmark is valid until (this is for information purposes only)

#### 5.4.4 Remove a benchmark

Click on the  next to the benchmark you wish to delete

You will be asked to confirm you want to delete the bookmark.

**CAUTION** This will delete all selections made against this benchmark by staff and champions.