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REF2014 module

Calculation if in post throughout

Rules for Calculating in Post Throughout

The in post throughout property on the REF1 (Staff) is calculated, this page describes the rules for this calculation.

In order for a person to be in post for the entire REF period, the person must have an academic post or a number of academic posts at the HEI for the entire REF period. In Pure, this means that there must be organisation associations for a person where the start and end dates for the associations must span the REF period, and there must not be any gaps in time between two associations. That is, if the person get a new association, i.e. a higher grade, or a new title, then the gap between start date of the new association and the end date of the old association, must not be larger than seven (7) days.

For the most persons in Pure, they would have one organisation association, i.e. one academic position, with no end date, then the start date must be before the start date of the REF period, then they would be in post throughout.

Choosing Organisation Associations

To ensure that only the relevant organisation associations for a person is considered when calculating the in post throughout, the calculation employs the same rules as the Person to Staff synchronisation job, that is, the employment types configured in the synchronisation job, is the same ones used in the calculation. For instance, if the synchronisation job is configured to created REF1 staff for all persons with the employment types "academic" and "research" then the in post calculation only considers the organisation association with this employment types, when calculating the in post throughout.

Person update REF values synchronisation job

The name of the job in PURE is **PersonUpdateREFValuesSyncJob**

A run once job will be created which makes it possible to update persons with some fields related to the REF2014 module. These values will be set on the Person, and is therefore visible in the normal PURE backend.

It is currently possible to set the following values, hesa-id, retiralDate, RAE2008. All these fields are optional, and you can leave them blank if you do not have the data.

NOTE some customers will have their person synchronisation updated to include these fields, so this job is only another option to set these fields.

You must select which persons to update, and what values should be set in the specific fields. This has to be done in the following manor:

- Log into your Pure installation as an administrator
- Go to the complete list of persons
- You can limit the person list if you know certain criteria should be applied, e.g. Current affiliations and certain employment types
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: name.firstName, name.lastName, employeeld, id
- Add new columns called: hesald, retiralDate, rae2008, entryIntoAcademicProfession
- **NOTE: in 4.9.1 and later versions, it must also contain the column: *submittedToRAE2008* which is added after *entryIntoAcademicProfession***
- You **MUST** include all columns and in this order
- For each person in the Excel file you must specify which value should be added to the fields. If you do not have the data, just leave the field empty for that person.
 - The retiralDate and entryIntoAcademicProfession must be on the format dd-mm-yyyy e.g. 21-02-2012, or empty.
 - The rae2008 must be an integer between 1 and 67 corresponding to the different UoAs in RAE2008, or empty.
 - The submittedToRAE2008 must contain the string **true**, **false**, or be empty.
- Save the file
- An example of the format for the Excel file has been attached to this page. Note there are examples of both 4.9.0 and 4.9.1

This document must afterwards be saved as an csv file which is used by the job.

When editing the excel document you must save it as a .csv file, the following must be true for this .csv file:

- The encoding must be UTF-8
- The seperator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

Documentation of Person update REF values synchronisation job

The job will update Persons with specific fields.

To run this job, you must use an Person field mapping document as described above, see attached example.

If the mapping document is not valid, the mapping job will fail to run.

This document must be uploaded to the PURE server, and specified within PURE where it is located before the job is run.

To do this, select the Administrator tab in PURE, then under system settings there is a menu item called REF2014. Here you must set the following field to the path of the document, including the filename:

person.update.ref.values.document (The exact path to the mapping document, which must be a .csv file)

E.g. /pack/webapps/todd_ref2014_devel/ref_data/person_field_mapping.csv

When the job is run, it will do the following

1. read the mapping document and validate it, e.g. correct amount of columns. If the document is not valid the job will fail.
2. It will then update all the person specified, setting hesa-id, retiralDate, and RAE2008. If the field is empty in the .csv file, nothing will change, except if override is enabled, see below.

NOTE. the fields are also added to the Person editor, so you can also set the values here, and the editor fields are not set to read only, so you can update them in the editor.

If the field is already set on the Person, the synchronisation job will not update the field. Also note that if some customers want these fields to be read-only or removed from the Person editor, then this is possible.

If you want the job to override the existing values on the Person, you must change the following configuration parameter (located under REF2014, like the document location option):

person.update.ref.values.override (Whether the job must override existing values


If this value is set to true, it will always override the existing value on the Person, including setting an empty value if the field is empty in the mapping document.

Whether to use the employeeld in the mapping document instead of the PURE id.

If set to false (default) the 'id' column (the PURE id) is used to find the person. NOTE the PURE id changes if you switch database, e.g. going from test to production. If you set it to true the employeeld column is used, which is a synchronised value and should therefore not alter between test and production.

By default the id column is used

File	Modified
Microsoft Excel Sheet 4.9.0_persons_update_fields.xls	Apr 07, 2011 by Kragh-Hansen, Henrik (ELS-AAL)
File 4.9.0_persons_update_fields.csv	Apr 07, 2011 by Kragh-Hansen, Henrik (ELS-AAL)
File 4.9.1_persons_update_fields.csv	Apr 07, 2011 by Kragh-Hansen, Henrik (ELS-AAL)
Microsoft Excel Sheet 4.9.1_persons_update_fields.xls	Apr 07, 2011 by Kragh-Hansen, Henrik (ELS-AAL)

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REF2 Move Predicted Grade To Peer Comment Job (4.12.3)

Sets the predicted grade on REF2 to "Not graded" and copies the original value to a peer comment instead, with a comment. REF2 not included in this document will not be altered.

NOTE REF2 where the 'Workflow for selection to REF2014' is set to **'Selected for REF2014'** or status is **'REF2 Confirmed'** the REF2 will not be altered.

To create this mapping document you can get the initial excel document by doing the following:

- Log into your Pure installation
- Go to the list of REF2
- You can limit the REF2 list if you know certain criteria should be applied
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: staffREF2014.staffREF2014, researchOutput.researchOutput, and id
- Add a new column called comment
- For each REF2 in the Excel file set the comment describing why the predicted grade is moved to a peer comment instead. Note if the field is left empty the predicted grade is not moved
- Save the file
- An example of the format for the Excel file has been attached to this page

This document can either be used as an excel document or it can be saved as an csv file.

If using a .csv file, the following must be true for this .csv file:

- The encoding must be UTF-8
- The separator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

This document must then be uploaded to the server running pure and the configuration value:

The exact path to the mapping document


Must be updated with the exact path including the filename of the mapping document.

When a peer comment is created, the "Peer name" is set to the value specified in the configuration value:

Peer name

Alter this if you do not want the default value.

File	Modified
Microsoft Excel Sheet ref2MovePredictedGradeExample.xls	Feb 27, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF2 Predicted Grade Job (4.12.3)

Sets the predicted grade on REF2 based on the provided mapping document. REF2 not included in this document will not be altered.

NOTE REF2 where the 'Workflow for selection to REF2014' is set to **'Selected for REF2014'** or status is **'REF2 Confirmed'** the REF2 will not be altered.

To create this mapping document you can get the initial excel document by doing the following:

- Log into your Pure installation
- Go to the list of REF2
- You can limit the REF2 list if you know certain criteria should be applied
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: staffREF2014.staffREF2014, researchOutput.researchOutput, and id
- Add a new column called predictedGrade
- For each REF2 in the Excel file set the predicted grade you want for this specific REF2. Note if the field is left empty "Not Graded" will be selected. Supported values for this column is the following:
 - *Not graded:* ng, n/g, na, n/a, NotGraded
 - *Unclassified:* u, u/c, uc, Unclassified
 - *One star:* 1, 1*, One
 - *Two star:* 2, 2*, Two
 - *Three star:* 3, 3*, Three
 - *Four star:* 4, 4*, Four
- Save the file
- An example of the format for the Excel file has been attached to this page

This document can either be used as an excel document or it can be saved as an csv file.

If using a .csv file, the following must be true for this .csv file:

- The encoding must be UTF-8
- The separator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

This document must then be uploaded to the server running pure and the configuration value:

The exact path to the mapping document

Must be updated with the exact path including the filename of the mapping document.

File	Modified
Microsoft Excel Sheet ref2PredictedGradeExample.xls	Feb 27, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF2 Selection Status Job (4.12.4)

Sets the selection status on REF2 based on the provided mapping document. REF2 not included in this document will not be altered.

NOTE REF2 where the status is '**REF2 Confirmed**' the REF2 will not be altered.

To create this mapping document you can get the initial excel document by doing the following:

- Log into your Pure installation
- Go to the list of REF2
- You can limit the REF2 list if you know certain criteria should be applied
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: staffREF2014.staffREF2014, researchOutput.researchOutput, and id
- Add a new column called selectionStatus
- For each REF2 in the Excel file set the selectionStatus you want for this specific REF2. Note if the field is left empty nothing will be changed.
Supported values for this column is the following:
 - Proposed
 - Review
 - Selected
 - NotSelected
- Save the file
- An example of the format for the Excel file has been attached to this page

This document can either be used as an excel document or it can be saved as an csv file. If using a .csv file, the following must be true for this .csv file:

- The encoding must be UTF-8
- The seperator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

This document must then be uploaded to the server running pure and the configuration value:

The exact path to the mapping document

Must be updated with the exact path including the filename of the mapping document.

File	Modified
Microsoft Excel Sheet ref2SelectionStatusExample.xls	Mar 29, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF2 Workflow Status Job (4.16.3)

Sets the workflow status on REF2 based on the provided mapping document. REF2 not included in this document will not be altered.


To create this mapping document you can get the initial excel document by doing the following:

- Log into your Pure installation
- Go to the list of REF2
- You can limit the REF2 list if you know certain criteria should be applied
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: staffREF2014.staffREF2014, researchOutput.researchOutput, and id
- Add a new column called workflowStatus
- For each REF2 in the Excel file set the workflowStatus you want for this specific REF2. Note if the field is left empty nothing will be changed. Supported values for this column is the following, note the () information is only to show what workflow status it corresponds to in the editor:
 - entryInProgress (REF2 Entry in Progress)
 - forApproval (REF2 Checking Underway)
 - approved (REF2 Confirmed)
- Save the file
- An example of the format for the Excel file has been attached to this page

You must create a new "File Handle" under master data, and select REF2014 as the type, and then upload the excel document you have just created

This file handle will then be available in the dropdown under the configuration of the job.

File	Modified
Microsoft Excel Sheet ref2WorkflowStatusExample.xls	Aug 14, 2013 by Kragh-Hansen, Henrik (ELS-AAL)

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REF4a Synchronisation job (4.13.0)

Used to synchronise REF4a data into PURE

NOTE This is the only way to get REF4a data into PURE. It cannot be manually created.

The job can be configured to use three different source of data. Either it is based on PURE data, or it is based on Excel data, either in a detailed format or in a summary format. What should be done in each type is described below.

The different type is selected using the **REF4a sync type** configuration value.

This is a synchronisation, so if values are no longer present in the source data, then they are deleted from Pure.

NOTE when switching away from EXCEL_DETAILS or PURE sync type, ALL existing REF4a Details are deleted!!

PURE

The REF4a details are created based on all students in PURE which has an awarded date within the REF2014 period.

They will have a supervisor association created for each supervisor in PURE. The FTE is split using the percentage value on a supervisor association in PURE. If percentage is not set, the supervisor association is not used.

You can configure which student types you want to limit to. This is specified in the configuration:

Limit the awarded students to those with a specific student type

Specify a comma separated list of the entire URIs of those student types you want to limit to. NOTE if nothing is specified, nothing is limited.

NOTE the remaining configuration values for this job is not used when using the PURE sync type.

EXCEL_DETAILS

See the attached document "ref4adetails.xls" for a documentation of how the format must be.

StudentId and SupervisorId are required fields, and if the specified student or supervisor cannot be found in PURE, the name fields are required.

It is possible to specify what type of ID you want to use for both student and supervisor. The specified IDs in the excel document should correspond to persons in PURE with the specified values.

In 4.13.1 it will be possible to configure whether you want to log a warning (default behavior), info, or nothing when no student with the specified ID was found.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you **MUST** specify the submission code. If you do not use multiple submission, you **MUST** leave the field empty. If you do not specify a UoA, then no UoA will be assigned, however if the supervisor is in a UoA in REF1a/c then this is used. Note if the person do not have a REF1a/c, then it is also possible to specify the UoA on the person, which is then used. After import, you can override the UoA if the student should be submitted in another UoA than the supervisor.

You must specify a value in **ONE** of the year columns, you must specify a value between 0 and 1. **NOTE** no validation is performed to check whether your total FTE for a student is 1.0, or whether you have set the student to be awarded in two different years for different supervisors

The excel document must be specified in the configuration:

Excel document for EXCEL_DETAILS sync

Must be updated with the exact path including the filename of the mapping document.

NOTE the remaining configuration values for this job is not used when using the EXCEL_DETAILS sync type.

EXCEL_SUMMARY

See the attached document "ref4asummary.xls" for a documentation of how the format must be.

Note when using this type, no REF4a details will be available, only the summary page.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you **MUST** specify the submission code. If you do not use multiple submission, you **MUST** leave the field empty.

Excel document for EXCEL_SUMMARY sync

Must be updated with the exact path including the filename of the mapping document.


NOTE the remaining configuration values for this job is not used when using the EXCEL_SUMMARY sync type.

File

Modified

Microsoft Excel Sheet ref4asummary.xls Mar 28, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

Microsoft Excel Sheet ref4adetails.xls May 02, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF4b Synchronisation job (4.13.0)

Used to synchronise REF4b data into PURE

NOTE This is the only way to get REF4b data into PURE. It cannot be manually created.

The job can be configured to use three different source of data. Either it is based on PURE data, or it is based on Excel data, either in a detailed format or in a summary format. What should be done in each type is described below.

The different type is selected using the **REF4b sync type** configuration value.

This is a synchronisation, so if values are no longer present in the source data, then they are deleted from Pure.

NOTE when switching away from EXCEL_DETAILS or PURE sync type, ALL existing REF4b Details are deleted!!

PURE

There will be created one REF4b details for each person (grant holder), which is associated to a project projects in PURE which has a spend with a fiscal year between 2008 and 2012.

If the person is associated to more than one project these will be added to the same REF4b details as a list.

NOTE it is required that academic ownership is set in your data, otherwise the project will not be used

NOTE if a project has more than one funding, it is required that each spending has a "budget account ref" which corresponds to one of the fundings on the project.

NOTE the remaining configuration values for this job is not used when using the PURE sync type.

EXCEL_DETAILS

See the attached document "ref4bdetails.xls" for a documentation of how the format must be.

Grant Holder Id, Income code, and Income type are required fields, and if the specified grant holder cannot be found in PURE, the name fields are required.

It is possible to specify what type of ID you want to use for grant holder. The specified IDs in the excel document should correspond to persons in PURE with the specified values.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you **MUST** specify the submission code. If you do not use multiple submission, you **MUST** leave the field empty. If you do not specify a UoA, then no UoA will be assigned, however if the grant holder is in a UoA in REF1a/c then this is used. Note if the person do not have a REF1a/c, then it is also possible to specify the UoA on the person, which is then used. After import, you can override the UoA if the project should be submitted in another UoA than the grant holder.

The income code is not being matched to anything in PURE so just write what makes sense to you. The income code is displayed in the GUI in PURE.

The income type must be a number between 1 and 15.

The excel document must be specified in the configuration:

Excel document for EXCEL_DETAILS sync

Must be updated with the exact path including the filename of the mapping document.

NOTE only the the "Excel document for EXCEL_SUMMARY sync" is not used when using the EXCEL_DETAILS sync type.

EXCEL_SUMMARY

See the attached document "ref4bsummary.xls" for a documentation of how the format must be.

Note when using this type, no REF4b details will be available, only the summary page.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you **MUST** specify the submission code. If you do not use multiple submission, you **MUST** leave the field empty.

The income type must be a number between 1 and 15.

If you have different income sources in an UoA, just add the row more than once and alter the income type column accordingly.

If you do not specify income type, then any values in the different years will not be imported for that UoA

Excel document for EXCEL_SUMMARY sync

Must be updated with the exact path including the filename of the mapping document.

NOTE the remaining configuration values for this job is not used when using the EXCEL_SUMMARY sync type.

File


Modified

Microsoft Excel Sheet ref4bdetails.xls

May 01, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

Microsoft Excel Sheet ref4bsummary.xls

May 01, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF4c Synchronisation job (4.13.1)

Used to synchronise REF4c data into PURE

NOTE This is the only way to get REF4c data into PURE. It cannot be manually created.

The job can be configured to use two different source of data. Excel is the only source, but in two different formats, what should be done in each type is described below.

The different type is selected using the **REF4c sync type** configuration value.

This is a synchronisation, so if values are no longer present in the source data, then they are deleted from Pure.

NOTE when switching away from EXCEL_DETAILS sync type, ALL existing REF4c Details are deleted!!

EXCEL_DETAILS

See the attached document "ref4cdetails.xls" for a documentation of how the format must be.

Principal investigator Id is a required field, and if the specified principal investigator cannot be found in PURE, the name field is required.

It is possible to specify what type of ID you want to use for principal investigator. The specified IDs in the excel document should correspond to persons in PURE with the specified values.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you MUST specify the submission code. If you do not use multiple submission, you MUST leave the field empty. If you do not specify a UoA, then no UoA will be assigned, however if the principal investigator is in a UoA in REF1a/c then this is used. Note if the person do not have a REF1a/c, then it is also possible to specify the UoA on the person, which is then used. After import, you can override the UoA if the facility time should be submitted in another UoA than the principal investigator.

You must specify whether the income-in-kind is type 14 or 15. Note 14 can only be used when in UoA 1-6.

The facility, associated RC reference number, and RC Provider are used as the "title" for a facility time in PURE. You must specify at least one of the facility and associated RC reference number columns for each row.

If the same principal investigator is available more than once, then a "facility time" is added in pure for each combination of the "facility" and "associated RC reference number" column. If a principal investigator has several occurrences in the same year of the same combination of the "facility" and "associated RC reference number" column, then that year's values are summed together. If there are several occurrences of the same "facility" and "associated RC reference number" column, then the UoA and Income-in-kind columns must be the same

The excel document must be specified in the configuration:

Excel document for EXCEL_DETAILS sync

Must be updated with the exact path including the filename of the mapping document.

NOTE only the the "Excel document for EXCEL_SUMMARY sync" is not used when using the EXCEL_DETAILS sync type.

EXCEL_SUMMARY

See the attached document "ref4csummary.xls" for a documentation of how the format must be.

Note when using this type, no REF4c details will be available, only the summary page.

When specifying UoA, you must write a number between 1 and 36. If you are using multiple submission, you MUST specify the submission code. If you do not use multiple submission, you MUST leave the field empty.

You must specify whether the income-in-kind is type 14 or 15. Note 14 can only be used when in UoA 1-6.


You must specify a column for each income-in-kind type for UoA 1-6.

Excel document for EXCEL_SUMMARY sync

Must be updated with the exact path including the filename of the mapping document.

NOTE the remaining configuration values for this job is not used when using the EXCEL_SUMMARY sync type.

File	Modified
Microsoft Excel Sheet ref4csummary.xls	Jun 26, 2012 by Kragh-Hansen, Henrik (ELS-AAL)
Microsoft Excel Sheet ref4cdetails.xls	Jun 26, 2012 by Kragh-Hansen, Henrik (ELS-AAL)

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REF2014 Person to UoA run once job

The name of the job in PURE is **PersonToUoAMappingJob**

A run once job will be created that relates Persons to REF2014 UoA. If the person is not associated to an existing Staff REF2014, it will be created. The purpose of the job is to give you a good starting point for the work with relating REF2014 Staff to REF2014 UoA.

The relations will be made specific for each Person. If you want to use this job, you must provide a mapping between a Person in Pure and a REF2014 UoA. This has to be done in the following manor:

- Log into your Pure installation as an administrator
- Go to the complete list of persons
- You can limit the person list if you know certain criteria should be applied, e.g. Current affiliations and certain employment types
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: name.firstName, name.lastName, employeeid, id
- Add a new column called UoA
- For each person in the Excel file add the UoA you want to make this specific organisation, to the new column. The value to place in this column should be the UoA number, e.g. 1, 2, 3 and so on. If you do not want to map a specific person to an UoA leave the field empty for this person.
- Save the file
- An example of the format for the Excel file has been attached to this page

This document must afterwards be saved as an csv file which is used by the job.

When editing the excel document you must save it as a .csv file, the following must be true for this .csv file:

- The encoding must be UTF-8
- The separator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

Documentation of Person to UoA run once job

The job will associate an UoA to selected persons.

To run this job, you must use an UoA mapping document as described above, see attached example.

If the mapping document is not valid, the mapping job will fail to run.

This document must be uploaded to the PURE server, and specified within PURE where it is located before the job is run.

To do this, select the Administrator tab in PURE, then under system settings there is a menu item called REF2014. Here you must set the following field to the path of the document, including the filename:

person.to.uoa.mapping.document (The exact path to the mapping document, which must be a .csv file)

E.g. /pack/webapps/todd_ref2014_devel/ref_data/uoa_mapping_demo.csv


When the job is run, it will do the following

1. read the mapping document and validate it, e.g. correct amount of columns, and the UoA fields are empty or contains an integer between 1 and 36. If the document is not valid the job will fail.
2. It will check each row, if the UoA field is specified, it will do the following:
 - a. If the person does not have an existing Staff REF2014, it will be created, otherwise the existing will be used.
 - b. The UoA will be set according to the specified UoA field. NOTE if an existing Staff REF2014 already is associated to an UoA, it will not override this value, but instead just log that an UoA already was associated.

Whether to use the employeeid in the mapping document instead of the PURE id.

If set to false (default) the 'id' column (the PURE id) is used to find the person. NOTE the PURE id changes if you switch database, e.g. going from test to production. If you set it to true the employeeid column is used, which is a synchronized value and should therefore not alter between test and production.

File	Modified
Microsoft Excel Sheet person_to_uoa_mapping_example.xls	Feb 22, 2011 by Kragh-Hansen, Henrik (ELS-AAL)

Drag and drop to upload or [browse for files](#) 

REF2014 related release notes summary

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 - 16.3. Joint submissions
- 17. 4.13.0
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1. 4.16.4-1 (4.15.9-1)

1.1. Corrected bug in "is duplicate output" under data to be submitted

Affected Bases: [Base-UK]

Roles affected: REF2 related roles

Feature description:

The field "is duplicate output" under data to be submitted only returns true if there exist another REF2 for the same research output which is being submitted in the same UoA. Note REF2 is only being submitted if it is selected for REF2014, workflow confirmed, the REF1a/c is eligible and submitted, and workflow confirmed.

However there was a bug, so we could return true if there were duplicates in another UoA.

The bug can be reproduced by having three (A, B, C) REF2 for the same research output.

- (A) submitted in UoA 1
- (B) selected for review in UoA 1
- (C) submitted in UoA 2

When opening "the data to be submitted" tab for (A) then "is duplicate output" returns false, because (B) is currently not actually being submitted

When opening "the data to be submitted" tab for (B) then "is duplicate output" returns true, because (A) is being submitted. NOTE because (B) is not being submitted, then this data is never sent to the submission system, but if (B) is altered to actually being submitted, then BOTH (A) and (B) will return true for "is duplicate output".

When opening "the data to be submitted" tab for (C) then "is duplicate output" returns true, which **IS NOT CORRECT** and has been fixed. NOTE if (B) is updated to have status "Not selected for REF2014" then (C) correctly returns false for "is duplicate output".




It is advised for all REF2014 customers to update, to include this bugfix before the final submission to the submission system.

IF you are not upgrading to include this fix, it is highly advised to update all REF2 which you are not submitting to have the status "Not selected for REF2014", to avoid this bug. If you do not select "Not selected for REF2014" on (B) you must manually update the "is duplicate output" value for (C) in the submission system, after the final submission.

Furthermore if you have a scenario (A, B, C) where ALL are actually being submitted, you must also manually update the "is duplicate output" value for (C) in the submission system, after the final submission.

Further information:

 UKPURE-6784 - Data cannot be retrieved due to an unexpected error.

Contact/created by: HKH

2. 4.16.3-1 (4.15.8-1)

2.1. Non English language is now set to false when remit is selected for UoA 28

Affected Bases: [Base-UK]

Roles affected: Editors of REF2

Feature description:

When submitting non English research outputs in UoA 28 you can select yes to: 'Output produced in any of the languages within the remit of the UoA (Celtic, Slavonic, Germanic, and Romance)?' and you do not have to specify an English abstract, see screenshot below:

Is the output submitted in a language other than English?

Yes. Publication language is German

Output produced in any of the languages within the remit of the UoA (Celtic, Slavonic, Germanic, and Romance)?


Yes No

However, due to a bug in the validation rules in the submission system, they still require an English abstract for the non English outputs in UoA 28.

Therefore the submitted values has been updated in Pure to specify the output to be English instead, in order not to trigger the validation error in the submission system.

IMPORTANT if you do NOT install this update, then you will have to manually update all non English outputs submitted in UoA 28 to be English outputs, if you do not want the validation error (and the language is indeed within the remit of the UoA)

Further information:

 UKPURE-6688 - Data cannot be retrieved due to an unexpected error.

Contact/created by: HKH

3. 4.16.3 (4.15.8)

3.1. Whether REF2 is non english language is now submitted to the submission system


Affected Bases: [Base-UK]

Roles affected: Administrator

Feature description:

If a REF2 is not english, e.g. the language of the related research output is not set to english, this is now submitted to the submission system. Before it was only shown in the "data to be submitted" tab.

Further information:

 UKPURE-6612 - Data cannot be retrieved due to an unexpected error.

Contact/created by: HKH

4. 4.16.2-3 (4.15.7-2)

4.1. The job "REF2 output document submission to REF2014 submission system" should no longer timeout when a lot of PDF is submitted


Roles affected: Administrator

Feature purpose: The current job can timeout when a lot of PDFs are submitted, this should no longer occur

Feature description:

The job now saves the REF2 each time a PDF is submitted to the submission system, so the editor and data to be submitted screen now correctly reflects whether a PDF has been submitted to the submission system.

Further information:

 UKPURE-6559 - Data cannot be retrieved due to an unexpected error.

4.2. REF2 Workflow Status Job

Roles affected: Administrator

Feature purpose: Used to set the workflow status on REF2 based on a spreadsheet

Feature description:

Sets the workflow status on REF2 based on the provided mapping document. See the wiki for further information about the mapping document

Further information: [REF2 Workflow Status Job \(4.16.3\)](#)

5. 4.16.2-1 (4.15.7-1)

5.1. 1. Correction to 'Copy total FTE from person to REF1a/c' job

Roles affected: Administrator

Feature purpose: The FTE calculation is sometimes not correct on the person, the updated job calculates the total FTE based on the REF2014 census date for REF1a/c

Feature description:


Previously when the job ran it copied the value from the calculated total FTE on person, but as Sophie Collet correctly points out in [UKPURE-6351](#) this is not calculated correctly because it is regarded as former when the check is performed later that day, because we calculate the FTE based on active organisation associations.

I have updated this job so instead of just copying the total fte from the person, it checks all the persons organisation associations and all those which is active at census date we use the FTE. This also ensures that if you run the job on e.g. 10th november we calculate what FTE the person had on 31/10-13.

E.g. if the person has an association which is active from before the census date and ends on the census date (regardless of what hour/minute/second /millisecond it is ended) that FTE is used and copied to the new field on the REF1a/c
If the person has another association which starts on the census date (or later) that FTE will not be included in the value copied to the REF1a/c.

NOTE: It is **VERY** important that all customers using Pure to submit to REF2014 to upgrade to this version

Further information:

 UKPURE-6100 - Data cannot be retrieved due to an unexpected error.

6. 4.16.2 (4.15.7)

6.1. Added 'Copy total FTE from person to REF1a/c' job

Roles affected: Administrator

Feature purpose: The FTE submitted to REF2014 must be from 31/10/2013.

Feature description: A new job has been created called 'Copy total FTE from person to REF1a/c' this has been scheduled to run on 31/10/2013 at 10 pm. Note it is possible to manually change this if you want it to run on a different time

The job copies the "Total FTE" value from the person to the corresponding REF1a/c, and this value is used instead when submitting to the submission system. Note it is still possible to override this value in the REF1a/c editor.

The job should only be run once, and if it is run again, all REF1a/c which already has a copied value, will not be updated.

Filters and reports has been updated to use this new value in the following priority:


1. REF1a/c override value. If empty, use...
2. REF1a/c new field copied from person. If empty, use...
3. Person total FTE

The old logic was the same, just without step 2.

New projections/columns and functions has also been added to show this new field in reports.

The REF1a/c editor has not been altered, but the copied value will be used if it is available.

Further information:

 UKPURE-6100 - Data cannot be retrieved due to an unexpected error.

7. 4.16.1 (4.15.6)

7.1. Research groups are not deleted in joint submissions, when submitting to the REF2014 submission system

Roles affected: Administrator

Feature purpose: The REF2014 submission system does not allow deletion of research groups where there is content in from other HEIs

Feature description:

When you are performing a joint submission with another HEI, you need to coordinate with them what Research Groups you are using in that UoA, these MUST be the same, and have the same order.

When submitting to the REF2014 submission system from Pure, we no longer delete research groups in joint submissions, only add new ones. Therefore you must manually delete them in the submission system if you no longer need a research group.

This is because the submission system does not allow you to delete a research group when the other HEI is submitting content in that research group.

So in order to delete it from the submission system, you must delete all references to that research group, and then delete the research group

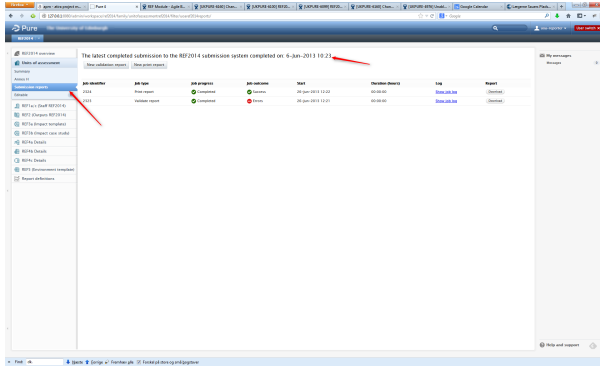
7.2. Validation and print reports can now be retrieved from the REF2014 submission system, using Pure

Roles affected: Administrator, REF2014 administrator, (Super)Editor of UoA, and REF2014 reporter

Feature purpose: To be able to retrieve reports from the submission system

Feature description:

A new submenu item is now available under Unit of Assessment where you can generate reports from the submission system



You are able to generate two types of reports, a print report and a validation report. These reports are personal, e.g. you cannot see another persons report, only the ones you have requested yourself.

For each of the reports you are able to select which UoA you want the report for. When selecting print report you have further options to specify what kind of report you want.

In the top of the screen you can see when the last successful submission has been performed. If it is a long time ago, you will probably see big differences between the report and what you see in Pure.

Note, it is still only administrators who can perform a submission to the submission system

8. 4.16.0 (4.15.5)

8.1. Performance improvements for the REF2014 Overview, REF1a/c summary, REF2 summary, and REF2 summary statistics pages

Roles affected: REF1a/c and REF2 related roles

Feature description:

Several improvements has been made for the REF2014 Overview, REF1a/c summary, REF2 summary, and REF2 summary statistics pages. All of these pages should now load at an acceptable speed, when being run on appropriate hardware.

If you still encounter REF related performance issues, please create a issue describing it with the following details:

- What user are you using (or is it for all users)?
- What page are you accessing?
- Have you specified any filters / limitations on the page? E.g. what UoA have you limited to, what staff eligible and submitted status have you chosen etc.
- How many seconds does a full page load take?
- What is the URL to the Pure installation where the performance issue is seen?

8.2. Submission to the REF2014 submission system no longer delete research groups in joint submissions

Roles affected: Administrator

Feature purpose: To prevent submission errors when in a joint submission.

Feature description:

The normal procedure when submitting to the submission system is to clear all submissions and all forms (REF1a/c, REF2, RG etc.) but when in a joint submission and your partner has submitted REF1a/c or REF2 to a research group, then you can no longer delete it.

To prevent these errors, we do no longer delete research groups before submitting to a joint submission.

IMPORTANT if you alter any of your research groups, you **MUST** update the submission system accordingly. This includes any form of modification, including moving up and down in the list, renaming, deletion, adding etc.

After you have submitted, it is highly advised to check that the correct research groups is available, and the correct REF1a/c and REF2 is associated to the appropriate research groups

9. 4.15.4

9.1. Scopus journal enhancement job

Roles affected: Administrator

Feature purpose: Makes it possible to add ASJC codes to publications based on their related journal

Feature description: A new cron job called "Scopus Journal Enhancement Job" has been added, this job makes it possible to load in ASJC codes for your publications, based on which journal the publication is related to. You need to have ASJC codes on your publications if you want to load in the percentile in subject area data provided by HEFCE via the REF submission system.

In order to run the job you need a spreadsheet which maps journals to ASJC codes. This spreadsheet is available from Elsevier at <http://www.info.sciverse.com/scopus/scopus-in-detail/facts>. Download the spreadsheet via the link called "List of titles (xlsx)" in the "Key Links" box.

The first thing you must do is to upload this spreadsheet into Pure. This is done by adding a File Handle which is located in the "Master data" tab -> File handles. First you need to specifying the usage by selecting "Synchronisation" in the dropdown menu. Next you need to give a description as well, e.g., "Journal enhancement excel document" and finally upload the file and press save.

Now you need to configure the job itself. To do so go to "Administrator" tab -> "Jobs" -> "Cron job scheduling". Here click the "Create new job" button in the top right and select the job called "Scopus journal enhancement job", it is located under "Synchronisation with external systems".

Before you run the job you need to carefully consider the configuration options. Please notice that the job will behave differently based on which option you make. To change the configuration click the "edit configuration" button on the job. The following configuration options are available:

Scopus journal mapping document

Upload a File Handle under Master data with the mapping document. You must specify the type of the File Handle to be "Synchronisation". Note the mapping document can be downloaded from: <http://www.info.sciverse.com/scopus/scopus-in-detail/facts> it is called "List of titles (xlsx)" in the "Key Links" box

Journal enhancement excel document

File: **asjc.xlsx**

File handle: File handles > Synchronisation

Default:

Enable ASJC classification enhancement

Whether publications should be updated with ASJC classifications based on the associated journal. If set to false, no ASJC classifications are altered on the publications

true

ASJC classification sync type

Determine how publications with existing ASJC classifications should be handled. If set to REPLACE all existing ASJC which are not available on the associated journal will be removed, and any missing will be added. If set to ADD never deletes any ASJC but adds missing ASJC based on the associated journal. If set to ADD_IF_NONE_EXISTS only adds ASJC if none is already available on the publication

ADD

Allow update of publications without a Scopus ID

If set to False, only publications which has a Scopus ID are updated, if set to True, all publications with a matched related journal is updated

false

More than one journal matched strategy

When more than one journal was matched, i.e. if there are more than one journal in Pure with the same print issn and/or electronic issn or title (if enabled) corresponding to the specific row information in the spreadsheet. Specify how this should be handled. If set to ALL_MATCHED, all journals which are matched is used. If set to NONE, does not select any journal when more than one was matched, and logs a warning about this.

ALL_MATCHED

Same journal found more than once strategy

When the same journal was found more than once, i.e. different rows in the spreadsheet due to a journal having several print issn and/or electronic issn. Specify how this should be handled. If set to USE_ALL_ASJC, then all the ASJC for all the rows in the spreadsheet which resulted in the same journal being found will be added to publications related to the journal. If set to USE_NO_ASJC then publications related to the journal will not be updated with any ASJC.

USE_NO_ASJC

Allow match on journal title

The journals are matched based on the electronic and print ISSN. If no journal was matched, and this value is set to true, we will check whether there is a journal with an exact title match (ignoring casing)

false

Each of the configuration options are described in the user interface. Except for the specification of which spreadsheet to load, all the configuration options have default values that should suit most customers, but it is important that you check, that you are happy with these.

To select the spreadsheet to load, use the dropdown under "Scopus journal mapping document" and from there select the spreadsheet that you previously uploaded.

The rest of the configuration options are as follows:

- Always set "Enable ASJC classification enhancement" to true. This is a placeholder configuration for usage if we in the future decides to add more functionality to this job.
- "ASJC classification sync type" determines what to do if some of your publications already have ASJC classifications.
- "Allow update of publications without Scopus ID" determines if you only want to update publications that have a ScopusID
- The two configuration options "More than one journal matched strategy" and "Same journal found more than once strategy" highly depends on the quality of your data.
-

- If you have duplicate journals, it is advised to use ALL_MATCHED for the "More than one journal matched strategy" configuration
- If you have journals with multiple ISSN's (not only print and electronic, but e.g. multiple print ISSN's) it will probably be matched by more than one row in the spreadsheet, you can then choose to select to use the "USE_ALL_ASJC" and it will add the ASJC from both rows to publications related to the journal
- If you want to cleanup your data, you can set the two options to NONE and USE_NO_ASJC. The job will then log a warning about this these cases. You can use this information to correct your journal data and then run the job again.
- The "Allow match on journal title" will try to match on title as well as ISSN and is thus only interesting if you do not have ISSN's on your journals. In order to be a match on title, the journal title in Pure and in the spreadsheet need to be exactly the same. i.e., no fuzzy matching is performed. The matching disregards upper and lower case letters.

NOTE:

When the job is started, it uses a lot of time parsing the spreadsheet, and depending on the performance of the hardware you run Pure on, it will run for a long time before it starts to output anything to the job log. The progress bar will start to increase after the spreadsheet has been loaded and parsed and update to reflect data going into Pure.

Please also note that the job requires a lot of memory of the server running Pure. You should expect it to consume at least 1 GB of memory when it runs, so please check that this resource is available on your server before running the job.

Further information: The spreadsheet can be downloaded from: <http://www.info.sciverse.com/scopus/scopus-in-detail/facts> it is called "List of titles (xlsx)" in the "Key Links" box

9.2. Percentile supports HEFCE format

Feature name: Scopus Citation Percentile ranking of Publications

Roles affected: Administrators

Feature purpose: Allow percentile information from HEFCE for use in REF2014

Feature description:

Please note: In order to use this feature, you need to have a Scopus subscription and update your publications with citation by year.

In 4.15.0 we made it possible to load Scopus Percentile in subject area data into Pure by buying a data set from Elsevier with this data. In 4.15.4 we have extended this job to also support the format for percentile in subject area data provided by HEFCE via the REF submission system. Please see the [release notes for 4.15.0](#) for a more detailed description of the percentile in subject area functionality.

The percentile data provided by HEFCE is a spreadsheet format (the XLSX format). It can be acquired by requesting it from info@ref.ac.uk

Updating Pure with percentile in subject area data requires four steps:

- First you need to ensure that you have ASJC subject area codes on your publications. Use the job described above to do so.
- Next you need to make sure that you have Scopus citation by year information on your publications in Pure. You need a Scopus subscription in order to do this. Use the job called "Scopus Citations Synchronisation" (located under "Synchronisation with external systems").
- Next you need to upload the XLSX spreadsheet containing the percentile in subject area data into Pure. You do this via the Administrator tab under "Citations and Impact Factors" -> Citation percentile table. [Please see the release notes for 4.15.0 for details on this](#) - in 4.15.4 Pure have been extended to support the XLSX format provided by HEFCE for this job as well.
- When the percentile data has been uploaded to Pure you need to link it to the publications. You do this using the job called "Update Scopus Citation Rank (percentiles)". To set this up go to the Administrator tab, select Jobs and then press the "Create new job" button. You can find the "Update Scopus Citation Rank (percentiles)" under "Bulk changes".

When all four steps have been followed, you should see a new section on the metric tabs for those publications that have both Scopus citation by year information as well as ASJC codes attached.

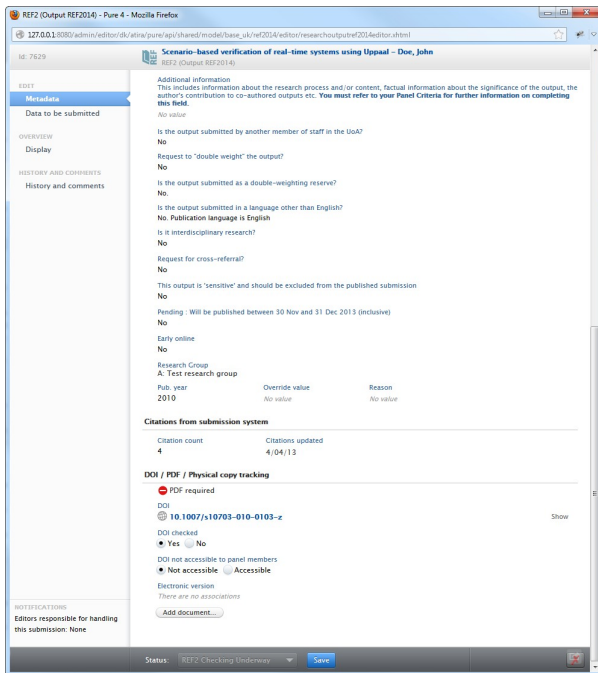
9.3. New REF2014 role "REF2 DOI / PDF / Physical copy tracker"

Roles affected: Administrators

Feature purpose: The purpose of the role is to allow users to modify the DOI / PDF / Physical copy tracker section of REF2 without allowing modification to the remaining part of the REF2

Feature description: When the user has this role on an UoA, all REF2 in that UoA are editable, but only the DOI / PDF / Physical copy tracker section the remaining part is read only.

See screenshot below:



However, if the user also has another role which grants modify permission for that UoA, the user is allowed to modify all fields.

The role allows modification in all workflow steps

9.4. Added DOI checked Y/N in "DOI / PDF / Physical copy" section in REF2 editor for output type D and E

Feature name: Added DOI checked Y/N in "DOI / PDF / Physical copy" section in REF2 editor for output type D and E

Roles affected: REF2 editors

Feature purpose: The purpose of the field is to be able to indicate whether or not the DOI has been checked as valid.

Feature description: Even though the related research output has a DOI, it is not certain that this DOI is correct or even valid, so this extra radiobutton makes it possible to indicate whether someone has checked if the DOI is correct.

The radiobutton only appears if the REF2 has output type D or E.

DOI / PDF / Physical copy tracking

PDF required

DOI
 10.1007/s10703-010-0103-z Show

DOI checked
 Yes No

DOI not accessible to panel members
 Not accessible Accessible

Electronic version
There are no associations

The new field can be reported and filtered upon

9.5. Show 'Proposed research output for REF2014' tab in person editor is configurable based on Eligible and Submitted status

Roles affected: Administrator

Feature purpose: Previously Eligible and Submitted was in one configuration, now it is more configurable

Feature description: Two new configuration options has been added in the administrator tab under System settings -> REF2014

The two configuration options are: **Show 'Proposed research output for REF2014' tab in person editor when the related REF1a/c is marked as not eligible** and **Show 'Proposed research output for REF2014' tab in person editor when the related REF1a/c is marked as not submitted** the defaults are false and true respectively. This means that when a REF1a/c has been selected to be not eligible, the tab where you can propose REF2 is no longer shown in the person editor for that related person. However, if the REF1a/c is set to not submitted, even though she is eligible, the tab is still shown. However if the last configuration option is also set to false then the tab will disappear. If both values are set to true, then the tab will always be shown if the person has a related REF1a/c.

9.6. Disable proposing of new REF2

Roles affected: Administrator

Feature purpose: Making it possible to prevent users from proposing more REF2, depending on the configuration.

Feature description: It is now possible to disable proposing REF2. This is done through configuration, where you can setup who should no longer be able to propose REF2 and for what UoA, i.e. it is possible to disable proposing of REF2 for persons related to UoA 1, but allow persons associated to UoA 2 to still propose REF2.

Proposing is split into 3 statuses:

- **OpenAllUsers:** (default) all users are allowed to propose REF2 (which still has appropriate roles regarding the person).
- **ClosedPersonalUsers:** the person can no longer propose REF2, however person editor/administrator for that person, REF2014 administrator, and administrators are still allowed to propose REF2 for that person.
- **ClosedAllUsers:** no users are allowed to propose REF2.

NOTE when proposing of REF2 is disabled, it is also not possible to modify existing selections or comment through the person editor. However the standard REF2 editor still works as usual.

The new configurations are available in the administrator tab under System settings -> REF2014. The default value is **OpenAllUsers**

See configuration example:

The screenshot shows the REF2014 configuration interface with four sections, each with a dropdown menu:

- REF2 propose status for persons not associated to an UoA**: Dropdown set to **ClosedPersonalUsers**.
- REF2 propose status for persons associated to UoA 1**: Dropdown set to **ClosedAllUsers**.
- REF2 propose status for persons associated to UoA 2**: Dropdown set to **OpenAllUsers**.
- REF2 propose status for persons associated to UoA 3**: Dropdown set to **OpenAllUsers**.
- REF2 propose status for persons associated to UoA 4**: Dropdown set to **OpenAllUsers**.

9.7. Disable Research Group on REF2 for an UoA

Feature name: Disable Research Group on REF2 for an UoA

Roles affected: UoA editors

Feature purpose: To be able to disable Research Group selection on REF2 for certain UoAs

Feature description: In the **Research Group(s)** section in the UoA editor it is now possible to say yes to

"Disable Research Group on REF2" when this is disabled research groups are no longer shown or submitted for REF2 in that UoA

10. 4.15.2

10.1. REF2014 : Data to be submitted validation rules updated

Feature name: Data to be submitted validation rules updated

Roles affected: All REF2014 related roles

Feature purpose: The validation rules in Pure should correspond to the validation rules in the submission system

Feature description: HEFCE has provided a documentation of the validation rules for all content submitted to REF2014 <http://www.ref.ac.uk/pubs/subsysuserguide/>

Each of the "Data to be submitted" tabs in the editors has been updated to follow this validation, i.e. if something contains validation errors in Pure it also contains validation errors in the submission system, and the other way around.

Further information: [UKPURE-5347](#) - REF2014 : Submission : Validation rules - RELEASED

Contact/created by: HKH

10.2. Submission to REF2014 available as a cron job

Feature name: Submission to REF2014 available as a cron job

Roles affected: Administrator

Feature purpose: It is now possible to set up a cron job to automatically submit to the submission system

Feature description: A new cron job called: "**REF2014 Submission Job**" has been added, it performs the same action as the "**Submission to REF2014**" sub menu item under "**Units of assessment**". It clears the current submission in the submission system, and uploads what is currently set to be submitted. It is advised to turn this job off when you are near the submission date, to know exactly when and what you are submitting.

NOTE if you want to know what is being submitted to REF2014, you can under the "**Annex H**" sub menu item select "**Only use actually submitted values**" (default) and then select all UoAs and click on the "**Export to XML**" link to the right. Note this file gets very large when you are submitting a lot, i.e. when getting closer to the submission date, and more of your content has been validated and selected

Further information: [UKPURE-5337](#) - REF2014 : Units of Assessment : Submission to REF2014 - RELEASED

Contact/created by: HKH

10.3. Filter users based on where their roles apply to

Feature name: Filter users based on where their roles apply to

Affected Bases: All

Roles affected: Administrator, User administrator

Feature purpose: To make it possible to find all the users which have a given role (another existing filter) on a specific Organisation

Feature description: New filters has been added to the user list. A filter for each possible type of content where a role can be applied to, e.g. Organisation or Unit of Assessment (only UK), has been added.

If this filter is selected you can search for that type of content, and only users which have a role which is applied to this content is shown, see screenshot:

If this filter is used combined with the existing role filter, it is possible to find all users who are e.g. Person editor for Organisation X

Further information: [UKPURE-5269](#) - Users : Filter in content list so that you can find users within an organisation or an UoA - RELEASED

Contact/created by: HKH

11. 4.15.1

11.1. Retrieving citations from REF2014 submission system

Feature name: Retrieving citations from REF2014 submission system

Roles affected: Administrator and REF2014 administrator

Feature purpose: To retrieve citations to help decide what REF2 to submit

Feature description: The "Submission to REF2014 (BETA)" tab under Unit of Assessment has been update to also support retrieving citations.

The page now includes three buttons see screenshot:

1. Use this button to perform your actual submission to the REF2014 submission system, i.e. only content which actually being included in your submission is submitted here, i.e. workflow status must be "REFx Confirmed", and it clears your current submission in the submission system. NOTE this button has not changed from 4.15.0
2. This button only submits REF1a/c and REF2, and only from UoA where citations are used. It submits regardless of the workflow status of the REF1a/c and REF2, a detailed description is shown when you click the button. All REF2 which would not have been a part of (1) is submitted as "excluded from submission". This action does not clear the submission system, but only adds, so should be run after (1).
3. Retrieve citation information from the REF2014 submission system. Should be run after (1), and (2) if you want citations for those outputs you are considering. NOTE the submission system have a delay up to 30 min before it starts to match outputs for citations.
4. Click this to check whether a job is done (Should be done for all jobs, and a new job should not be started before the old one has been completed)
5. Click to download the citation report to Pure
6. Click to update REF2 with the citation information.

NOTE step 4-6 should be for the same job, and not 3 different job, just used to illustrate the different situations.

Two configuration options has been added, which are both disabled by default, see screenshot:

1. Stores the Scopus ID, on the related research output, which was matched in the submission system. It only adds it if no Scopus ID was already added. Note if the existing Scopus ID and the matched Scopus ID are not the same, then a warning is shown, this is done for all, regardless of what this setting is set to.
2. Stores the total citations, on the related research output. This functionality is not advised for customers who already have a Scopus subscription, because that service provides better citations where they are split by year, instead of just a total citation count.

Further information: [UKPURE-4674](#) - REF2014 : Submission of items not yet 'confirmed' - RELEASED [UKPURE-4904](#) - Add total citation (NO year) on research output - RELEASED [UKPURE-4923](#) - Make it configurable whether to add Scopus id on outputs without scopus id when importing citations - RELEASED

11.2. PDF on REF2 is maintained in Pure

Feature name: PDF on REF2 is maintained in Pure

Roles affected: Administrator

Feature purpose: To be able to maintain the PDF attached to REF2 in Pure, instead of in the submission system

Feature description: A new cron-job has been added "REF2 output document submission to REF2014 submission system".

This job uploads PDF to the submission system to all submitted REF2 where the document has not already been uploaded. If the document already has been uploaded and is later deleted in Pure, it will also be deleted in the submission system when the job is run.

NOTE this job must be run AFTER you have submitted your REF2, otherwise it will generate errors in the job log, because the REF2 is not available in the submission system.

The job only uploads PDF for REF2 which in Pure are set to be submitted, i.e. submitted to the submission system when clicking on button (1) described in "**Retrieving citations from REF2014 submission system**"

Further information: [UKPURE-5433](#) - PDF on REF2 should be maintained in Pure, and the web-service should be used to upload and delete the pdf documents in the REF2014 submission system - RELEASED

11.3. DOI / PDF / Physical copy tracking changed for REF2 to reflect new requirements from HEFCE

Feature name: DOI / PDF / Physical copy tracking changed for REF2 to reflect new requirements from HEFCE

Roles affected: Users allowed to modify REF2

Feature purpose: Improved how this is tracked, to be more elaborate and correspond to the updated requirements from HEFCE

Feature description: Whether a physical copy or a PDF should be attached to the REF2 instead of a DOI now follow the new rules. Additional filters in listings and in reporting has been created to track these changes. Furthermore the REF2 summary statistics page has been updated to reflect the new model

See the related issues for additional screenshots showing the different scenarios.

Further information: [UKPURE-5459](#) - DOI / PDF / Physical copy tracking refactored for REF2 to reflect new requirements from HEFCE - RELEASED [UKPURE-5357](#) - REF2014 : REF2 : Summary Statistics - ACCEPTED BY CUSTOMER

12. 4.15.0

12.1. AnnexH can now be configured regarding what is included

Feature name: AnnexH can now be configured regarding what is included

Roles affected: UoA editors

Feature purpose: Making it possible to get an AnnexH overview if you have selected content which is not currently being submitted to the REF2014 submission system

Feature description: You can specify whether you want the AnnexH to only use what is actually being submitted (the default behavior and how it is done now)

You can instead select to limit to REF1a/c with a given eligible and/or submitted status (similar to the other summary pages)

You must specify what selection status the REF2 should be in and you must specify what workflows are allowed (this is both for REF1a/c and REF2) see screenshot below for example of the configuration

12.2. REF2: Early online

Feature name: Early online option has been added to REF2

Roles affected: REF2 editors

Feature purpose: Ability to pass REF submission validation when a REF2 is early online

Feature description: When a REF2 has output type D selected, a new Early online field appears.

Default is No, and everything will work as usual.

If Yes is selected then n/a is returned for the following fields under data to be submitted, if no value is available:

- Article number (note only if first page is also empty)
- Volume
- Issue

A filter on the REF2 editable list has been added, and it is possible to filter and group on it in the report module

NOTE if the related research output is a Contribution to Journal, then the year value from the Early online date is used if specified.

12.3. ECR override on REF1b introduced

Feature name: ECR override on REF1b introduced

Roles affected: REF1b editors

Feature purpose: Making it possible to override the ECR value on REF1a/c on the REF1b

Feature description: When a REF1a/c has been marked as ECR, and a REF1b is created it is now possible to specify that the REF1b should not have an ECR circumstance.

This allows the REF1b to have option 5 or 6 selected, because they are mutually exclusive with ECR.

This makes it possible to return ECR information on the REF1a/c but also return a REF1b where ECR is not selected. See screenshot below for GUI example

12.4. ECR explanatory text is no longer a WYSIWYG editor

Feature name: ECR explanatory text is no longer a WYSIWYG editor

Roles affected: REF1b editors

Feature purpose: The REF2014 submission system does not support markup, so this has been removed

Feature description: The explanatory text on REF1b is no longer a WYSIWYG editor (where you can format the text with bullet etc) but just a simple text field

It is advised that you after the upgrade to 4.15.0 check each of your REF1b explanatory text, because the formatting might not look like desired.

12.5. REF4b supports capital expenditure split over 3 years

Feature name: REF4b supports capital expenditure split over 3 years

Roles affected: REF4b editors

Feature purpose: To ensure correct values are used when using Pure data for REF4b, i.e. using your project data

Feature description: A new configuration option has been added to REF4b sync, you you can specify what budget letter/line you consider to be capital expenditure. See screenshot of the configuration option below:

Depending on what project model you use it is either the 'Funding financial letter' or 'Unified Project Model: Types of Budget Lines' classification scheme to specify what classification(s) are used as capital expenditure.

When the job is run, all spend money with the specified capital expenditure as the budget letter/line will then be split over 3 years

e.g.

If a project only have one spend for 2006 which is 15000 then there will be selected 5000 for 2008 if it is a capital expenditure

If 15000 is selected for 2008 and it is a capital expenditure, then 5000 will be selected for 2008, 2009, and 2010

If 15000 is selected for 2012 and it is a capital expenditure, then 5000 will be selected for 2012

If another classification is selected for capital expenditure, then it will not be split.

Note that there is no capital expenditure selected by default so you must manually update your REF4b sync job to use the appropriate classification(s)

13. 4.14.2

13.1. REF2014 Mapping document

Feature name:

Affected Bases: UK

Roles affected: REF specific roles

Feature purpose: Documentation of the mapping between Research Output and REF2

Feature description: The almost final mapping document from Pure research output types to REF2 types included as a excel file.

Further information: [Pure_to_REF2_Output_mapping_updated_by_Atira_26-11-2012_REVISIED 03-12-2012_JAWmf3.xls](#)

13.2. REF2014 Reports

Feature name:

Affected Bases: UK

Roles affected: REF specific roles

Feature purpose: REF2014 report definitions has been created and can be reused locally

Feature description: Based on the REF2014 report suggestions send to Aтира from various customers, we have created a set of report definitions that can be imported into your own Pure and used as a starting point for creating you own REF2014 reports. The reports can be found in Jira [UKPURE-4833](#)

13.3. REF1b : Calculation when ECR is combined with part-time

Feature name:

Affected Bases: UK

Roles affected: REF specific roles

Feature purpose: The rules to calculate output reduction has been updated to reflect the correct rules when ECR is combined with either 2 or 4 (or both)

Feature description: The rules for calculating reduction in output required, has been updated to correctly reflect paragraphs 82 and 83 of the Panel Criteria (page 12):

82. Where individuals have had a combination of circumstances with clearly defined reductions in outputs, these may be accumulated up to a maximum reduction of three outputs. For each circumstance, the relevant reduction should be applied and added together to calculate the total maximum reduction.

83. Where Table 1 is combined with Table 2, the period of time since 1 January 2008 up until the individual met the definition of an early career researcher should be calculated in months, and Table 2 should be applied.

This change will effect those REF1b which are ECR, and also have the circumstance nr. 2 or 4 (or both). The new calculation results in that sometimes the output reduction is greater than before and sometimes less than before.

HEIs should extract a report from REF1b. Then post-upgrade, compare the calculations and follow up on those that may have changed.

13.4. Integration to REF2014 submission system (BETA)

Feature name:

Affected Bases: UK

Roles affected: Administrator

Feature purpose: To allow submission to the REF2014 submission system, NOTE it is only available to administrators, and NOTE this is only in BETA. Due to errors in the REF2014 submission web-service we are not able to update citations.

Feature description: A new summary page has been added under Unit of Assesment REF2014 when you are an administrator, where you can submit your REF2014 content to the submission system.

First you must configure how the submission should work, this is done under Administrator -> System settings -> REF2014

See screenshot for configuration options

You MUST enter a username and password, which is the user in the REF2014 submission system you are going to use to submit with. Note this should be an administrator in the submission system to have appropriate rights to use the web-service.

You must then select whether to use the live or test submission system. You can then select staffIdentifier type and prefix (existing configurations)

You must then specify your insitution code in the REF2014 submission system.

You must then select whether you want to submit, REF3, REF4a, REF4b, REF4c, or REF5 to the submission system. Default is true. NOTE REF4b does not currently work, and is therefore not submitted regardless of what is selected.

When you have configured your submission you are able to create a submission to the REF2014 submission system. However, note that it is only content which fulfill the submission requirements which is being returned, e.g. no error box in the top of the "data to be submitted tab" see screenshot below:

E.g. a REF1a/c must be marked as eligible and submitted, and the workflow must be confirmed. Furthermore it is only Unit of Assessments which are marked as "Active" which are being returned (default value for each UoA).

For each UoA you have Active, you must ensure that you have created a submission for that UoA in the REF2014 submission system using the following url: <https://test.ref.ac.uk/import/Submission>

To make an actual submission you must do the following steps, as shown on the screenshot:

1. Click on the new submission summary page

2. Click on the button to perform an actual submission, a popup will be shown with further details and you must confirm it. NOTE might be very time consuming based on the amount of data you are actually going to submit. A job will be added in the list below when complete
3. The job is now submitted to the REF2014 submission system and you must click the update button to see whether it is completed
4. When the job is complete a download button will appear and you can download the report from the submission system
5. When the download is complete you can view the report of the submission

Note that as soon as the submission is send to the REF2014 submission system, the same information is available there, i.e. <https://test.ref.ac.uk>

14. 4.14.1

14.1. Duplicated REF2 information on REF2014 overview removed

Feature name: Duplicated REF2 information on REF2014 overview removed

Roles affected: REF2014 related roles

Feature purpose: Improving the performance of users without Administrator or REF2014 administrator role

On the REF2014 overview page, it was previously possible to see how many REF2 that has been proposed more than once in the same UoA.

However, this has been removed, due to performance overhead of the check. Furthermore the information is already available on the "REF2 summary statistics" tab.

The information is still available for REF2014 administrator and Administrator

Further information: [UKPURE-4559](#) - Remove REF2 duplicates in REF2014 overview page - RELEASED

Contact/created by: HKH

15. 4.14.0

15.1. Annex H standard data analyses

Feature name: Annex H standard data analyses

Roles affected: Administrator, REF2014 administrator, (Super)Editor of Unit of Assessment, REF2014 reporter

Feature purpose: To make an idea about how your Annex H standard data analyses using submitted data to REF2014

Feature description:

Annex H standard data analyses has been added as a new summary page under Unit of Assessment REF2014.

All the values are based on data actually being submitted, i.e. we only use data which, on the "data to be submitted" tab, does not have any warning about why it is not returned.

If you do not have any data in your REF2014 module which is actually being submitted, then 0 will be shown in all tables.

15.2. Reasons for non-inclusion for REF1a/c (REF2014)

Feature name: Reasons for non-inclusion for REF1a/c (REF2014)

Roles affected: Administrator, REF2014 administrator, (Super)Editor of Unit of Assessment, (Super)Editor of Staff

Feature purpose: To make it possible to write better reasons for non-inclusion of REF1a/c

Feature description:

When a REF1a/c (Staff REF2014) has been excluded from the submission. (Inclusion in REF submission) has been set to not submitted, it is possible specify reasons for this.

It is possible to switch between simple and detailed description of the non-inclusion, this is configured in the administration tab -> system settings -> REF2014.

Include detailed description of why REF1a/c is not included in the submission

If set to true it is possible to specify detailed reasons for non-inclusion, and report on these values

true ▼

The default value is false, which will only enable you to write a reason, if true is selected the following options will be available:

1. The "**Reasons for non-inclusion**" only becomes available if this is set to "**Not submitted**"
2. You can specify the type of reason, and when "Other" is selected an input field is added which where you can specify the reason
3. You can specify whether individual circumstances has been declared, and provide a brief description (note nothing confidential must be written here)
4. Whether the individual has been informed

All these options are available as filters and groupings in the report module.

15.3. Search added to REF1b and REF2

Feature name: Search added to REF1b and REF2

Roles affected: All REF roles able to read REF1b or REF2

Feature purpose: It should be a lot easier to find REF1b and REF2

Feature description:

It is possible to search for REF1b by searching for the name of the staff which has the circumstances.

It is possible to search for REF2 by searching for the title of the research output, or the name of the submitting staff.

NOTE requires reindex to be run for REF1b and REF2.

15.4. REF2 summary page split into two pages

Feature name: REF2 summary page split into two pages

Roles affected: Administrator, REF2014 administrator, (Super)Editor of Unit of Assessment, (Super)Editor of REF2, REF2014 reporter

Feature purpose: To improve performance of the summary page and improve the overview

Feature description:

The bottom part where summary statistics are shown has been moved to its own summary page called "Summary statistics" below the normal "Summary" page

The first page will now only include the list of the submitted REF1a/c and their related REF2

15.5. Added tracking of Underpinning research on REF3b

Feature name: Added tracking of Underpinning research on REF3b

Roles affected: Administrator, REF2014 administrator, (Super)Editor of Unit of Assessment, Editor of REF3

Feature purpose: To add better tracking of hard copies for underpinning research

Feature description:

It is now possible to specify for each related underpinning research how it can be tracked, if requested by HEFCE.

If a DOI is available on the related research output, then nothing more is required. Otherwise it is possible to upload a document or specify a hard copy has been received.

This is all similar to how hard copy tracking is performed on REF2. Filters has also been added to track those who are missing hard copies.

15.6. Prefix for REF1a/c staff identifier has been reintroduced

Feature name: Prefix for REF1a/b staff identifier has been reintroduced

Roles affected: Administrator

Feature purpose: To be able to distinguish REF1a/c submitted using joint submission, so each university can use their own prefix to identify their submitted REF1a/c

Feature description:

The prefix can be specified under the administrator tab -> system settings -> REF2014

The input field is called: **Select an optional prefix for the returned staff identifier**

Whatever is put in here, will be inserted before the actual identifier as a label. NOTE that the total length must not be greater than 24 to be a valid staff identifier for the submission.

The combined staff identifier is shown under the "data to be submitted" tab in the REF1a/c editor.

15.7. Configurable when the submitter is allowed to Edit Choices for REF

Feature name: Configurable when the submitter is allowed to Edit Choices for REF

Roles affected: Administrator

Feature purpose: To be able to loosen up when submitters are able to modify their choices for REF. Previously you could not edit the choices after the REF2 was in "Selected for review" or further in the selection status

Feature description:

A configuration option has been added, for when the submitter is able to edit choices for REF. So as long as the selection status is the one selected in the dropdown, or before, it is editable by the submitter.

E.g. if you select "Review" it is editable when it is in "Proposed" and in the REF2 has selection status "Proposed for REF" or "Selected for Review" it is still editable by the submitter.

Furthermore if "NotSelected" is the selected value, the submitter is always able to edit the choices for REF2

15.8. Added Editor of REF3b

Feature name: Added Editor of REF3b

Roles affected: Administrator, Editor of REF3b, Editor of REF3a/b

Feature purpose: To be able to give permissions to REF3a and REF3b on separately

Feature description:

The old Editor of REF3a/b has now been renamed to Editor of REF3a and now only has the rights to modify REF3a and not REF3b

A new role has then been added called Editor of REF3b

If both roles are added to the same user, then the user will have the same permissions as Editor of REF3a/b in 4.13.x

15.9. Added 'WoS citation synchronisation job'

Feature name: WoS citation synchronisation job

Roles affected: Administrator

Feature purpose: To be able to update citations from research outputs imported from WoS

Feature description:

This is a new synchronisation job, which will update citation information from WoS, however, it is only some research outputs which will have their citations updated.

The requirements are the following:

1. There must exist a REF2 for the research output
2. The REF2 must be associated to one of the following UoAs: 1, 2, 3, 4, 5, 6, 7, 8, 9, 11, or 18
3. The research output must be imported from WoS, or have an UT associated

NOTE this job requires that WoS import is enabled to be able to run correctly.

16. 4.13.1

16.1. REF4c (Research income-in-kind)

Feature name: REF4c

Roles affected: REF2014 administrator, Administrator, and Administrator of REF4c (new global role)

Feature purpose: Added REF4c according to HEFEC requirements

Feature description:

Used to handle income-in-kind for the REF2014 submission. There is a summary page which shows how your income-in-kind is distributed among the different Unit of Assessments on the different fiscal years. Furthermore each of the spend is broken down by income-in-kind type for UoA 1-6 where it can be both 14 and 15.

It is only the summary information which is actually submitted to REF2014, but PURE supports a "REF4c Detail" model which is used to represent the underlying data for these values. The REF4c Details cannot be manually created, but must be synchronised. A synchronisation job has been created for this purpose which is described in further details here: [REF4c Synchronisation job \(4.13.1\)](#)

The REF4c information can be gathered from 2 different sources, but not in combination. Note it is not possible to synchronise from Pure data like REF4a and REF4b, because Pure cannot be used to track income-in-kind.

- **EXCEL details** - REF4c Details entities are created based on principal investigator and facility as you specify them, the persons being linked together is not required to be in PURE.
- **EXCEL summary** - Only populates the summary data (the data being submitted)

Notes: This is only BETA and is subject to change. If the model is changed, data is not being migrated, because all data is being synchronised.

Further information: Documentation of the synchronisation job [REF4c Synchronisation job \(4.13.1\)](#)

Contact/created by: HKH

16.2. Excel documents for REF4a/b/c must now be uploaded within Pure

Feature name: File handles for REF4a/b/c

Roles affected: Administrator

Feature purpose: Documents used by the synchronisation must now be uploaded using Pure

Feature description:

When configuring the REF4a/b/c jobs, you will now no longer be able to specify a path to where the excel documents are stored on the server, but instead you must create a new File Handle (new content type in Pure under master data)

When creating this File Handle, you must specify the type to be REF2014, and once it is saved, it is available in the the dropdown under REF4a/b/c configuration.

NOTE!! The jobs will not work before you have updated to these file handles (except if you use Pure as source)

Further information:

Contact/created by: HKH

16.3. Joint submissions

Feature name: Joint submission

Roles affected: Administrator, UoA-(Super)Editor, REF2014 Administrator

Feature purpose: Possible to indicate whether a UoA is part of a joint submission

Feature description:

It is now possible on each UoA to specify whether the UoA is part of a joint submission.

If the UoA is part of a joint submission, you must specify whether your institution is lead or not.

If your institution is NOT the lead, then REF3a, REF3b, and REF5 are no longer part of your submission, and are therefore not available for the given UoA

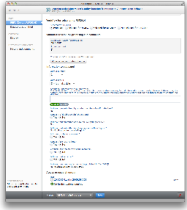
If your institution IS the lead, you must specify how many CAT A FTE your partner has. This is used when calculating the submission rules for REF3a, REF3b, and REF5

Further information:

Contact/created by: HKH

17. 4.13.0

17.1. REF2 Template



Roles Affected

All users with REF2 candidates.

Feature purpose

Update REF2 to align with HEFEC requirements

Feature Description:

The REF2 template has been updated to conform with the HEFCE requirement, and to improve readability. A new field called "Additional Information" have been introduced. This field replaces four (4) old fields, namely 'Panel A description', 'Panel B description', 'Co-authored description', and 'Material contribution of the author'. These fields will be migration into the new "Additional Information" field, so that all previous information will be appended to the new field.

An output number has also been added to the REF2 template. This field is a drop down field where it is possible to select one of the values 1, 2, 3, 4, and 'rest'. This field will be used when making submissions to the HEFCE submission system, and it is only possible to use the numbers 1 to 4 one time, therefore when selecting one of these numbers that is already used, the other REF2 with output numbers will be bumped, e.g. selecting a new 1 the old 1, will become 2 etc. When a REF2 is selected for REF in the 'Workflow for selection for REF' that output number will no longer be a possible selection for other REF2s. Furthermore it is not possible to select a REF2 for REF, if the output number is REST, since this indicates that the output should not be submitted.

An output type classification have also been added, it is possible to select one of the types from 'A' to 'U'. When proposing new REF2 outputs, if possible the type of the research output will be mapped to one of these classifications, otherwise a 'Not set' classification will be used. When proposing new output the author ranking will be used for the output number, so that if the author ranking is 1st, then the output number will become 1, if the values haven't previously been used. If the value is used by another REF2, then the nearest highest number will be used, e.g. new proposed output have author ranking of 2nd, but the output number 2 is used, then 3 will be used, if available and so forth.

The layout of the editor has also been changed to provide a better overview of the content. Most of the information that is to be submitted, is now grouped under the name 'Information to sub panel'.

17.2. REF1b Model/Editor



Roles affected

All

Feature Purpose

Update the REF1b model, to reflect new requirements from HEFCE.

Feature Description

The editor / model for REF1b has been changed to reflect the new requirements from HEFCE. The creation flow of the REF1b has also been changed, so that the REF1b now should be created by clicking on the + beside the REF1b (ISC REF2014) menu item.

The editor layout has changed to provide a better overview of the REF1b. When creating a REF1b it must be decided whether it is a simple circumstance or a complex circumstance. The possible input fields varies accordingly. When choosing a simple circumstance six (6) fields will be visible, see screenshot, and when selecting a complex circumstance only one field will be visible. The explanatory text will be visible for both types.

17.3. REF1b workflow + roles

Roles Affected

All

Feature Purpose

Update the REF1b model workflow and roles

Feature Description

There is now three steps in the workflow for the REF1b, so that the workflow is now similar to the other REF content with workflow. The workflow steps are REF1b Entry in progress, REF1b Checking underway, and REF1b confirmed.

One new role has also been added, the REF1b SuperEditor, who has the same rights as the editor, and can also move REF1b to the REF1b confirmed workflow step.

17.4. Model migration run-once jobs



Important

This **MUST** be run by all UK customers. The jobs are called 'Migrate REF2 to new model (must be run)', 'Migrate REF1b from the 4.12.x model to the 4.13.0 model', 'Migrate REF1a/c from 4.12.x model to 4.13.0 model', and 'Migrates the HESA classifications on Funding to the REF classification'.

Overview	Run once jobs
Jobs	Remove empty scan source configurations on persons
Cron Job Scheduling	Migrate REF2 to new model (must be run) (Scheduled at 18. Apr 2012 at 12:05) (Com
Single Run Jobs	REF2014 Staff bulk change job (Scheduled at 18. Apr 2012 at 12:06) (Completed at)
Job management	Migrate REF1b from the 4.12.x model to the 4.13.0 model (Scheduled at 18. Apr 2012
Job log	Migrate REF1a/c from 4.12.x model to 4.13.0 model (Completed at)
System status	Legacy import from Eprint (Scheduled at 30. Mar 2012 at 11:01) (Completed at)
System settings	
Messages and text resources	
Documentation	
Terms of agreement	

Roles Affected:

All

Feature Purpose

Update the aforementioned REF models

Feature Description

These jobs must be run as soon as PURE has been started. The jobs should be run one at a time.

The job **Migrate REF2 to new model** combines all the text fields from the old model into the field Additional information. It also makes sure that there are only one cross referred UoA, if there where more than one in the old model the first one will be used. A note will be added under "History and comments" describing what UoAs where not migrated. Output type and output number have been added to the model. An initial value is set based on the existing data. The model now forces you to write descriptions when double weighted has been requested and if there are conflicted panel members. If no text has been set in the old model, and the value was true, then the text "No description provided" will be added. If the output number is set to "Other" and the REF2 has been set to *Selected for REF2014*, then the selection is changed to *Selected for review* instead, because the output number must be between 1 and 4, when the output is selected for REF2014.

The job **Migrate REF1a/c from 4.12.x model to 4.13.0 model** makes sure all booleans on REF1 a/c are set, and UoA on the person is set to the same as the staff (see **Added Unit of Assessment to Person**)

The job **Migrate REF1b from the 4.12.x model to the 4.13.0 model** moves the ECR values from REF1b to REF1a/c. Converts part time working FTE to a month value "0.801-1.0 FTE to 0 months", "0.601-0.8 FTE to 20 months", "0.301-0.6 FTE to 35 months", and "0.3 or less FTE to 50 months". The old clearly defined circumstances has been split into "Additional paternity or adoption leave under four months", "Maternity, paternity, or adoption leave", and "Part-time working, leave, or secondment" here the amount of months is calculated based in the period you have provided. If an enddate has not been set, the REF deadline is used as end date. The value for the total amount absence as clearly defined has not been migrated, as this value is not submitted, but the sub results are. The old value has been added in the text field "internal notes". If the old model contained both complex and clearly defined circumstances, then complex is selected. But a note is added to the "Internal note" field describing this. In general all information provided in the old model is added to "Circumstance explanation" if there was some sort of description in the old model. The "Internal notes field" contains information about how the data has been migrated from the old to the new model

The job **Migrates the HESA classifications on Funding to the REF classification** maps the HESA classification on each funding to the corresponding REF Income type classification. The REF Income type classification is a new classification scheme added on the Funding, because they are not exactly the same as the ones from HESA. If you do not have valid HESA classification values on your fundings, then this job will not migrate anything.

17.5. REF3a and REF3b



Important

This replaces the old content type Impact statement which will be **DELETED and not migrated to the new model!!**

Roles Affected

UoA (super)editor, REF2014 administrator and Administrator

Feature Purpose

Update REF3 to align with HEFEC requirements

Feature description

REF3a will automatically be created for each available UoA, and cannot be created or deleted by users.

An impact template must be uploaded to each REF3a, this MUST be a pdf file.

REF3b must be manually created.

17.6. REF4a (Research doctoral degrees awarded)

**Notes**

This is only BETA and is subject to change. If the model is changed, data is not being migrated, because all data is being synchronised.

Roles Affected

REF2014 administrator, Administrator, and Administrator of REF4a (new global role)

Feature Purpose

Added REF4a according to HEFEC requirements

Feature Description

Used to handle students for the REF2014 submission. There is a summary page which shows how your awarded students are distributed among the different Unit of Assessments divided by the different award years.

It is only the summary information which is actually submitted to REF2014, but PURE supports a "REF4a Detail" model which is used to represent the underlying data for these values. The REF4a Details cannot be manually created, but must be synchronised. A synchronisation job has been created for this purpose which is described in further details here: [REF4a Synchronisation job \(4.13.0\)](#)

The REF4a information can be gathered from 3 different sources, but not in combination.

- **PURE** - The student / supervisor associations are used to create the REF4a Details. NOTE to use this option, your PURE data must be very good.
- **EXCEL details** - REF4a Details entities are created based on students and supervisors as you specify them, the persons being linked together is not required to be in PURE.
- **EXCEL summary** - Only populates the summary data (the data being submitted)

Further Information

Documentation of the synchronisation job [REF4a Synchronisation job \(4.13.0\)](#)

17.7. REF4b (Research income)

**Notes**

This is only BETA and is subject to change. If the model is changed, data is not being migrated, because all data is being synchronised.

Roles Affected

REF2014 administrator, Administrator, and Administrator of REF4b (new global role)

Feature Purpose

Added REF4b according to HEFEC requirements

Feature Description

Used to handle income spend for the REF2014 submission. There is a summary page which shows how your spend is distributed among the different Unit of Assessments on the different fiscal years. Furthermore each of the spend is broken down by income source.

It is only the summary information which is actually submitted to REF2014, but PURE supports a "REF4b Detail" model which is used to represent the underlying data for these values. The REF4b Details cannot be manually created, but must be synchronised. A synchronisation job has been created for this purpose which is described in further details here: [REF4b Synchronisation job \(4.13.0\)](#)

The REF4b information can be gathered from 3 different sources, but not in combination.

- **PURE** - Projects which has spend in the 2008 to 2012 fiscal years are used to create the REF4b Details. NOTE to use this option, your PURE data must be very good.
- **EXCEL details** - REF4a Details entities are created based on grant holders and projects as you specify them, the persons being linked together is not required to be in PURE.
- **EXCEL summary** - Only populates the summary data (the data being submitted)

Further Information

Documentation of the synchronisation job [REF4b Synchronisation job \(4.13.0\)](#)

17.8. REF5 (Environment template)

Roles Affected

UoA (super)editor, REF2014 administrator and Administrator

Feature Purpose

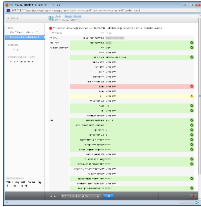
Added REF5 according to HEFEC requirements

Feature description

REF5 will automatically be created for each available UoA, and cannot be created or deleted by users.

An environment template must be uploaded to each REF3a, this MUST be a pdf file.

17.9. Data to be submitted tabs



Roles Affected

REF2014 related roles

Feature Purpose

To provide an overview in the templates whether the specific content is valid, and what values are actually being submitted.

Feature Description

In the REF1a/c, REF1b, and REF2 template a new tab called "Data to be submitted" has been added. The purpose of this tab is to give a fast overview of whether the content fulfills the requirements for the submission. Furthermore it displays all values being submitted. If the value is being submitted and is not valid, an error is shown, which can be seen by hovering over the error icon.

17.10. Added Unit of Assessment to Person

Roles Affected

Administrator, REF2014 administrator, Administrator of REF4a and Administrator of REF4b

Feature Purpose

Enables to specify which UoA a person would have been in if the person was submitted to REF2014. This is used by REF4a and REF4b

Feature description

The UoA is not shown in renderers, but is visible in the Person template to the following roles: Administrator, REF2014 administrator, Administrator of REF4a and Administrator of REF4b.

If the Person has a REF1a/c the field is read only and the UoA is determined based on the UoA associated to the REF1a/c.

Notes

It is advised to use this for all persons which are used for REF4a and REF4b, but without REF1a/c.

17.11. Updated summary pages for UoA, REF1a/c, and REF2

Roles affected

REF2014 roles

Feature Purpose

To make summary pages present the data in a better way.

Feature Description

The UoA and REF1a/c now supports that you are able to specify what REF1a/c you want to include in the tables, by filtering on the eligible and the submitted status.

The REF2 summary is now always eligible and submitted staffs only.

It is now more clear which UoA you have selected when more than one UoA has been selected.

17.12. Updated rules for when research output is locked based on REF2

Roles affected

REF2 related roles

Feature Purpose

We are no longer as restrictive when locking research output. Relations can still be added to REF2 (except events).

17.13. Several new REF2014 roles has been added

Roles Affected

Administrator

Feature Purpose

Each family now have their own roles.

17.14. Reporting update

Roles affected

Administrator, REF Reporters

Feature Purpose

Adding new reporting options for the following REF related content-types: REF1a/c, REF1b, REF2, REF3a, REF3b, REF5, UoA

Feature Description

Due to extensive restructuring and changes in the REF model: All previous reporting on REF types has been replaced and will no longer work. The new REF reporting setup contains almost all the previous options and a big chunk of new options

18. 4.12.4

18.1. REF2 selection status job

Feature name: REF2 selection status job

Roles affected: Administrator

Feature purpose: Used to set the selection status on REF2 based on a spreadsheet

Feature description: Sets the selection status on REF2 based on the provided mapping document. REF2 not included in this document will not be altered. NOTE REF2 where status is '**REF2 Confirmed**' the REF2 will not be altered.

Further information: <https://wiki.atira.dk/display/PUREUK/REF2+Selection+Status+Job+%284.12.4%29>

Contact/created by: HKH

19. 4.12.3

19.1. REF2 predicted grade job

Roles affected: Administrator

Feature purpose: Used to set the predicted grade on REF2 based on a spreadsheet

Feature description: Sets the predicted grade on REF2 based on the provided mapping document. REF2 not included in this document will not be altered. NOTE REF2 where the 'Workflow for selection to REF2014' is set to '**Selected for REF2014**' or status is '**REF2 Confirmed**' the REF2 will not be altered.

Further information: <https://wiki.atira.dk/display/PUREUK/REF2+Predicted+Grade+Job+%284.12.3%29>

19.2. REF2 move predicted grade to peer comment job

Roles affected: Administrator

Feature purpose: Used to move the predicted grade on REF2 to a peer comment, and set the predicted grade to 'Not graded' based on a spreadsheet

Feature description: Sets the predicted grade on REF2 to "Not graded" and copies the original value to a peer comment instead, with a comment. REF2 not included in this document will not be altered. NOTE REF2 where the 'Workflow for selection to REF2014' is set to '**Selected for REF2014**' or status is '**REF2 Confirmed**' the REF2 will not be altered.

Further information: <https://wiki.atira.dk/display/PUREUK/REF2+Move+Predicted+Grade+To+Peer+Comment+Job+%284.12.3%29>

19.3. Default values for creating REF1a/c is now configurable

Roles affected: Administrator

Feature purpose: The default values for new REF1a/c is not suitable for all UK customers, so it is now configurable

Feature description: Under the administrator tab - system settings - REF2014 is there three configuration values. See screenshot:

When a new REF1a/c is created either in the GUI or using a job, these values will apply. If the fields are left empty, the default values are used instead.

Further information: <https://issues.atira.dk/browse/UKPURE-2934>

20. 4.12.0

20.1. Multiple submissions in REF2014

Roles affected: Administrator

Feature purpose: Enables creating more than 36 UoAs. NOTE this must be accepted by HEFCE

Feature description: The feature is only available to administrators, and must be enabled under "system settings" for REF2014, and is disabled by default. Open the editor for the UoA you want to make multiple submissions in and click the icon to the bottom right. You will now have an A and B version of the UoA. The A version has the same REF1a/c etc. as before, and the new B does not have anything associated. NOTE you must assign new roles to the new UoA. After you have created a duplicate UoA, you can afterwards delete it, and all associated REF1a/c is moved to the remaining UoA. NOTE roles are never copied/moved.

Screenshots:

Notes: Should only be used if you get permission by HEFCE to perform multiple submissions.

Further information: UKPURE-2577

20.2. New REF2014 roles

Roles affected: SuperEditor of Staff REF2014, Editor of REF2 REF2014, SuperEditor of REF2 REF2014 (the new roles)

Feature purpose: SuperEditors have been added, which can also validate/confirm content.

Feature description: The SuperEditor of Staff REF2014 has the same rights as Editor of Staff REF2014 but can also confirm content. The REF2 roles are very similar to the staff roles, where the editor can edit REF2, and check the summary page for their UoAs. The SuperEditor is an extended version of this which can also confirm content.

Further information: UKPURE-2572 and UKPURE-2598

20.3. Research Groups in REF2014

Roles affected: REF administrator, Administrator

Feature purpose: Possibility to add research groups on an unit of assessment

Feature description: The research groups is created on the UoA editor by an administrator or an REF administrator. Pure creates a letter code that is assigned to the research group, in that way that the first in the list is always called A, the second called B and so on, even when moving the research groups in the list. It is possible to configure whether Staff REF2014 can be assigned to more than one research group, on the UoA, by selecting the appropriate value in the Research Group field set.

To assign Research Group to a Staff REF2014, an administrator, an REF administrator, or and Staff REF2014 editor can do this on the Staff REF2014 editor. If multiple research groups is allowed on the specific UoA the staff is assigned to, then checkboxes will be presented and if multiple research group is not allowed, then radio buttons will be shown.

It is possible to select which research group, that a REF2 output should be submitted in, if the Staff REF is assigned to multiple research groups, by default the first research group is assigned to the REF2. When changing the research groups, or UoA on the Staff REF, the research group on the REF2 will also be changed.

When deleting a research group on the Unit of Assessment editor, the research group will be removed from any Staffs that is assigned to the research group, as well as any REF2

Screenshots:

20.4. Propose outputs for REF2014

Roles affected: Personal users

Feature purpose: Redesigned the propose output screen

Feature description: The way the academic should propose outputs for REF2014, have been redesigned. It is now possible to give more information when selecting outputs for REF2014. To see which information that is possible to submit, see the first screenshot. The academic can rank the output that is proposed. It is possible to choose between 1-4 and 'reserve' as ranking. It is only possible to have one output with rank 1-4 and multiple outputs can be ranked 'reserve'. If choosing a new output as 1st, then the other output with ranking 1st, will be changed to 2nd, and if there were one chosen as 2nd, then this will become 3rd and so forth. When an output that is proposed for REF is selected for review or selected for REF, then the rank of that output cannot be selected again, unless it is ranked as reserve. That is, if the output ranked as 1st, is selected for review or REF, then it is only possible to choose 2nd, 3rd, 4th, and reserve as ranking.

The 'propose outputs' tab on the personal overview page for an academic have also been redesigned, to give a better overview of what have been proposed for REF and what candidates there is. The overview is divided into two columns the left hand side, is all the candidate outputs that the academic have within the REF period. The right hand side, is all the outputs that have been proposed for REF. It is possible to propose new outputs by clicking on either the 'Propose research output' button, or any of the items listed in the columns.

Screenshots:

21. 4.11.0

21.1. REF2014

The REF 2014 module have received a lot of changes for this release. Of the noteworthy changes are:

- Summary pages for REF1, REF2, and OUA
- Editors have been reworked for REF2, and REF1
- REF1b have been introduced with own editor and workflow
- Selection of candidates for REF2 have been changed
- Research Output can now be locked when selected for REF
- Bulk change script for REF1

21.2. Summary pages

Summary pages have been introduced for REF2 and for UOA, and the summary page for REF1 have been reworked. It is now possible to sort on the various columns in the summary page for REF1 and REF2.

21.3. Editors

The editors for REF1a/c and REF2 have been changed. The REF2 editor is now capable of showing and hiding fields depending of various states, e.g. SelectionStatus and related UoA panel. The renders for REF2 also reflect this. The REF1a/c editor now shows the number of outputs to be returned without a penalty, and it is possible to attach a REF1b.

The field "In post throughout" is no longer available, instead it is calculated based on the associated persons organisation associations, combined with possible override values. Existing data is therefore not migrated for this field.

The field "Entry into academic profession" is no longer available on the REF1a/c editor, instead it is calculated on the REF1b editor, combined with possible override values. REF1b must explicitly be created for those REF1a/c which needs it. Existing data is therefore not migrated for this field.

21.4. REF1b Editor

The REF1b individual staff circumstances have been introduced with its own editor and workflow. This can only be edited by administrators and by Editor of REF1b REF2014 users. The editor shows how many outputs that should be returned with out a penalty, this value is also shown on the REF1a editor.

21.5. Selection of candidates for REF2

The selection of candidates for REF2 have been changed. It is now also present on the personal overview page, that personal users sees when they login to Pure, if they have a REF1 staff. The submitter can give the candidate a rating between 0 and 5. It is possible to push notes to the submitter, by adding a note in the REF2 template, this will be shown for the submitter on the selection tab, see screen shot. The submitter can then reply to the comments by adding another comment. Emails will be sent to the submitter, when new notes are posted on the candidate.

21.6. Research Output can be locked

The Research Output that are selected for REF can be locked, when the corresponding REF2 is the workflow states 'REF2 Checking underway' and 'REF2 Confirmed'. When the Research Output is locked, no users can change the output not event administrators, if the output should be edited then the REF2 should be changed to another workflow state. It is possible to configure whether the research output should be locked, as described, this can be changed in the administrator tab under the 'REF2014' group by changing the 'is.researchoutout.locked.when.chosen.for.ref2014' value to false.

21.7. Bulk change script for REF1

A job have been introduced where it is possible to change eligible, submitted, and category values for all staff that have the defaults values. See link for more documentation of the job <https://wiki.atira.dk/display/PUREUK/REF2014+Staff+bulk+change+run+once+job>

22. 4.10.0

22.1. Scenarios

With scenarios it is possible to assign different Unit of Assessments to REF Staff, one new UoA per scenario. The scenarios are created based upon another scenario, if no scenarios exists, the primary UoA is used to create the scenario. It is possible to promote a scenario, this changes the REF Staff's primary UoA to the one from the promoted scenario. When a scenario is promoted, it will be deleted, since it is now the primary one. All of the managing of scenarios are done on the UoA overview page, changing of a REF Staff's UoA is done on the REF Staff editor. It is possible to see the influence of the different scenarios on the UoA overview page, by selecting the different scenarios in the drop down menu.

22.2. UoA overview page

the overview page have some added features. It is now possible to see how many students a given REF Staff person have. The student have been divided into three subcategories. Active, Awarded, and Expected Awarded. Active student are student that have a end date that lies after the REF period which is 01.08.07 - 31.07.13, or no end date at all. Awarded student are students that have a award date that lies within the REF period, and Expected Awarded students are student that have a end date that lies within the REF period, these students are the expected the be awarded within the REF period.

It is possible to click on the different number to see the data that the number are based upon. For instance if a REF Staff have three active student, by clicking on the number by the REF Staff, it is possible to see the three students.

It is also possible to see the amount a REF Staff person have been awarded within the REF period (01.08.07 - 31.07.13). The awarded amount is divided by the academic ownership the person have on the corresponding Funding. If there is no academic ownership given, and there are more that one person, the amount is equally divided between the associated persons.

22.3. REF Staff

The number of students and the awarded amount is also available on the REF Staff editor, as two new separate tabs.

23. 4.9.0

23.1. REF2014 module [Base UK]

This is a new module introduced to the UK base. Used to manage the data which should be submitted to REF in 2014.

The module currently includes the new content types: UoA REF2014, Staff REF2014, and Research OutputREF2014. Two new roles are also introduced, a global role called 'REF2014 Administrator', and a local role called 'Editor of Staff REF2014'.

The module currently also includes overview, filters, and reporting on these new content types.

- **Notes:** The module is only visible to administrators, REF2014 Administrators, and Editor of Staff REF2014

REF2014 Staff bulk change job

The name of the job in PURE is **REF2014 Staff bulk change job** and is found under **Single Run Jobs**

NOTE, this job is optional to run, it should only be used by those customers who are not satisfied with the default values

It is used to bulk change all Staffs, NOTE it does only change staffs which has the default value, e.g. Eligible status: pending, Submitted status: pending, Staff category: Category A.

So if a Staff has been altered, it will not be affected by this bulk job, this is to ensure we do not override Staff values which has already been corrected by someone.

Before the job is run, it must be configured, this is done using the **REF2014** settings under **System settings**. The following properties is used by this job:

- **StaffREF2014.bulkchange.eligible** has the following valid values:
 - **Pending** (corresponds to *Pending* in the eligible dropdown)
 - **Yes** (corresponds to *Eligible* in the eligible dropdown)
 - **No** (corresponds to *Not eligible* in the eligible dropdown)

- **StaffREF2014.bulkchange.submitted** has the following valid values:
 - **Pending** (corresponds to *Pending* in the submitted dropdown)
 - **Yes** (corresponds to *Submitted* in the submitted dropdown)
 - **No** (corresponds to *Not submitted* in the submitted dropdown)

- **StaffREF2014.bulkchange.staffCategory** has the following valid values:
 - **pending** (corresponds to *Pending* in the staff category dropdown)
 - **cata** (corresponds to *Category A* in the staff category dropdown)
 - **catc** (corresponds to *Category C* in the staff category dropdown)

NOTE if the fields are empty, the fields will not be altered. If invalid values are selected, the job will not run.

REF2014 Staff synchronisation job

You can run the synchronisation job as many times as you like. The first time it is run it will create the initial REF2014 Staff content, and on sequential runs do the following:

- If a staff is already created as a REF2014 Staff the REF2014 Staff will not be changed in any way
- If a REF2014 Staff is deleted and the sync job is configured in a way that will create this REF2014 Staff then the staff will be created again. This means that if you delete REF2014 Staff then you need to change the configurations of the synchronisation job in order to avoid that REF2014 Staff is just created again.

Documentation of REF2014 Staff synchronisation job

As described above, the job only creates REF2014 Staff if the person does not already have a REF2014 Staff entity. A new Staff REF2014 entity have the following default values:

- Eligible - Pending
- Submitted - Pending
- Staff category - Pending
- Mitigating circumstances - false

The criteria for creating a REF2014 Staff entity for a Person is the following:

- The person must have an staff association which is active (i.e. not former nor future)

Furthermore it will be possible to configure the synchronisation job within PURE. In the system settings under the Administrator tab is a menu item called REF2014, which contains configuration options.

StaffREF2014.staff.employmentTypeUri= (Limit to persons with certain employment types)

This option allows you to limit, so it is only persons with the specified employment types, which are created as REF2014 Staff.

This field must be specified by the suffix of each employment type classification uri, these can be separated by , if you want more than one employment type. You can specify as many as you like. If the specified type does not exist, the job will fail before it starts creating REF2014 Staff. If you do not specify anything in this value, it will create a REF2014 for all persons regardless of their employment type.

In the Classification editor for "Employment type" you can see the available employment types, and their URIs, e.g. Academic have the uri '/dk/atira/pure/person/employmenttypes/academic' and Honorary have '/dk/atira/pure/person/employmenttypes/honorary' so if you want these two types, you must put the following in StaffREF2014.staff.employmentTypeUri:

academic, honorary

Note that it must be the last part of the URI after the last '/'

StaffREF2014.staff.jobTitleUri= (only available in 4.10.0) (Limit to persons with certain job titles)

This option allows you to limit, so it is only persons with the specified job titles, which are created as REF2014 Staff.

This field must be specified by the suffix of each job title classification uri, these can be separated by , if you want more than one job title. You can specify as many as you like. If the specified type does not exist, the job will fail before it starts creating REF2014 Staff. If you do not specify anything in this value, it will create a REF2014 for all persons regardless of their job title.

In the Classification editor for "Job title" you can see the available job titles, and their URIs similar to employment types. They all start with the uri '/dk/atira/pure/person/jobtitles/', and for those job titles you want, you must select the part after the last /. See StaffREF2014.staff.employmentTypeUri for examples, because there are no common job titles between UK customers.

Note that it must be the last part of the URI after the last '/'

REF2014 Staff to UoA run once job

The name of the job in PURE is **UoAMappingJob**

A run once job will be created that relates REF2014 staff to REF2014 UoA. The purpose of the job is to give you a good starting point for the work with relating REF2014 Staff to REF2014 UoA.

The relations will be made based on the organisation that the Staff is related to in Pure. This means that each customer must provide a mapping between organisation in Pure and a REF2014 UoA. This has to be done in the following manor:

- Log into your Pure installation as an administrator
- Go to the complete list of organisation
- Download the list as an Excel file using the "Download list" functionality in the bottom of the list
- Save the Excel file to your computer and open it in Excel
- Remove all columns except: name.text organisationId and id
- Add a new column called UoA
- For each organisation in the Excel file add the UoA you want to make this specific organisation, to the new column. The value to place in this column should be the UoA number, e.g. 1, 2, 3 and so on. If you do not want to map a specific organisation to a UoA leave the field empty for this organisation.
- Save the file
- An example of the format for the Excel file has been attached to this page

Before the job can run the Excel file must be placed in a folder on the server that runs your Pure installation, and the job must be configured to know where the file is places. If the file cannot be found or does not follow the structure described above the job will fail and no changes will be made to the data in Pure.

When the job runs it will loop through each of the REF2014 Staff that have already been created. For each REF2014 Staff it will find this staffs organisation relation in Pure, find the organisation in the Excel file and make a relation to the UoA that is specified in the Excel file.

If the staff is related to more than one current organisation then one of two things can happen:

- No relation between REF2014 Staff and UoA is made
- A relation between the REF2014 Staff and a UoA is made based on the mapping for the first organisation in the list of related organisation

Which strategy to use will be a configuration parameter for the job.

Documentation of REF2014 Staff to UoA run once job

The job will associate an UoA to the REF2014 Staff based on the associated person's organisation(s).

To run this job, you must use an UoA mapping document, see attached example.

Important notes about this document. It must follow the specification:

- It must contain 4 columns
- The first row must contain the headlines, e.g. "name.text[en_GB]", "organisationId", "id", and "UoA" and in this specific order
- All organisations in PURE must be in this mapping document, if they should not map to any UoA, just leave the UoA column empty

When you are done with the mapping, you must save the document as a .csv file here you must set the options:

- The encoding must be UTF-8
- The separator must be ;
- The text delimiter must be "
- It must not contain an empty line in the end of the file, i.e. the last line in the csv must contain text

If any of these requirements are not met, the mapping job will fail to run.

This document must be uploaded to the PURE server, and specified within PURE where it is located before the job is run.

To do this, select the Administrator tab in PURE, then under system settings there is a menu item called REF2014. Here you must set the following field to the path of the document, including the filename:

StaffREF2014.uoa.mapping.document (The exact path to the mapping document, which must be a .csv file)

E.g. /pack/webapps/todd_ref2014_devel/ref_data/uoa_mapping_demo.csv

It will check all REF2014 Staff.

It will use the specified UoA mapping document (described above, and an example is attached) to determine which UoA to associate to the REF2014 Staff. It will use similar criteria as the REF2014 Staff synchronisation job, i.e. it will only look at the organisations for the active staff association.

If the **StaffREF2014.staff.employmentTypeUris (Limit to persons with certain employment types)** is specified, the mapping job will only look at the organisation associations where the person have one of the employment types specified in the list.

If the **StaffREF2014.staff.jobTitleUris (Limit to persons with certain job titles)** is specified, the mapping job will only look at the organisation associations where the person have one of the job titles in the list.

As described above, if more than one organisation was found, you can determine whether no relation should be created, or the first should be used as mapping organisation.

This is specified by the option:


StaffREF2014.uoa.mapping.defaultToFirstActiveOrganisation (If more than one active organisation is found, specify whether the first one should be used.)

If this is set to true, it defaults to the first organisation, otherwise no relation is created. The default value is **false**

Whether to use the organisationId in the mapping document instead of the PURE id.

If set to false (default) the 'id' column (the PURE id) is used to find the organisation. NOTE the PURE id changes if you switch database, e.g. going from test to production. If you set it to true the organisationId column is used, which is a synchronized value and should therefore not alter between test and production.

File	Modified
Microsoft Excel Sheet Organisation to UoA mapping.xls	Feb 15, 2011 by Kragh-Hansen, Henrik (ELS-AAL)

Drag and drop to upload or [browse for files](#) 

REF values configuration

This page presents which option for adding the extra REF values each customer has selected. These fields can only be seen and edited by either an administrator or REF administrator (roles).

Generally we can import this information in four ways:

1. Using your existing person sync job (field is always locked in the editor)
2. Using a spreadsheet ([see description of format here](#))
3. Manually (i.e. no import).
4. Do not show this field at all

For option 2 (spreadsheet), you have to select a combination of the two options below:

- Should the sync job overwrite existing values or not touch them on subsequent runs
- Should the field be locked in the editor

Based on this, the following selections has been made:

University	RAE 2008 UoA	HESA ID	Retiral date	Date of entry into the academic profession
St. Andrews		Person sync job		
Aberdeen		Person sync job		
Royal Holloway				
Strathclyde				
York				
Hertfordshire		Person sync job		
Lancaster	Person sync job			
Edinburgh				