

## REF2 workflows

This guide is for Editors of REF2.

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- As part of [your updates to REF2 in Pure](#), **you** need to update the *Workflow for selection to REF2021* (UOA workflow)
- The Research Office will update *Status* (RO Workflow)
- See also: [REF2 workflow flowchart](#).

Always click Save or Create or Update where you see them before you close a window or section, or your changes will not be saved.

### UOA workflow statuses

Status	What does it mean?
Proposed	<ul style="list-style-type: none"> <li>• The output has been proposed &amp; a REF2 created.</li> <li>• <b>The UOA review has not yet begun.</b></li> </ul>
Selected for review	<ul style="list-style-type: none"> <li>• <b>The UOA has started its review</b> of the REF2 and is updating the REF2 fields.</li> </ul>
Selected for UOA pool	<ul style="list-style-type: none"> <li>• <b>The UOA has completed its review</b> and update of the REF2, <b>inc. author attribution.</b></li> <li>• The UOA <b>is recommending the REF2</b> to the REF Decisions Panel for the submission.</li> <li>• The RO will check the DOI/PDF status and lock the record.</li> </ul>
Not selected for UOA pool	<ul style="list-style-type: none"> <li>• <b>UOA has completed its review</b> and update of the REF2.</li> <li>• The UOA <b>is not recommending the REF2</b> to the REF Decisions Panel for the submission.</li> <li>• The RO will lock the record.</li> </ul>

- Every REF2 should end up either *Selected for UOA pool* or *Not selected for UOA pool*.

You **must** attribute an author before saving a REF2 as *Selected for UOA pool*.

- The REF Decisions Panel needs to review every proposed output to make its decision and it can only do this when the UOA has reviewed and ruled the REF2 in or out of the UOA pool.

### RO workflow statuses

Status	What does it mean?
REF2 Entry in Progress	<ul style="list-style-type: none"> <li>• The RO has not started its checks yet.</li> </ul>
REF2 Checking Underway	<ul style="list-style-type: none"> <li>• The RO has <a href="#">started its checks</a>.</li> <li>• The UOA should not make changes to the REF2 without</li> </ul>

Status	What does it mean?
	checking with the RO first.
REF2 Confirmed	<ul style="list-style-type: none"> <li>• The RO has completed its checks.</li> <li>• Only the RO can update the REF2.</li> <li>• The REF2 will be exported to the REF submission system if UOA workflow = <i>Selected for UOA pool</i>.</li> </ul>

## Tracking the workflows

- To help track the workflow, a [report](#) has been shared with all Pure users with REF2 access: Reporting > Shared by institution > **REF2 workflows**.
- Open the report and go to the *Data story*, along the bottom of the window if it does not open on it.
- You will see a table showing how many REF2s sit at each workflow step and if authors have been attributed.
- You can view all outputs in a step by clicking on the number of REF2 for that row in the table. Either choose a single record or select Show in content list to be taken to a filtered summary screen for those records.