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| **Type of data management activity** | **Relevant to your research** | **Estimated costs** |
| **Acquiring External datasets**   * Do you plan to use existing data, and is the data available at a commercial partner? |  |  |
| **Formatting and organising**   * Are your data files, spreadsheets, measurements, interview transcripts, records etc. all in a uniform format or style? * Are files, records and items in the collection clearly named with unique file names and well organised? |  |  |
| **Transcription**   * Will you transcribe qualitative data (e.g. recorded interviews or focus group sessions) as part of your research; or will you need to do this specifically so data can be more easily shared and reused? * Is full or partial transcription needed? * Is translation needed? * Will you need to develop a standard transcription template or transcription guidelines, to ensure consistent formatting? |  |  |
| **Consent for data sharing**   * Do you need to ask participants for their consent for data to be shared? * Consent is essential for research in the domain of health/life sciences also for qualitative interviews |  |  |
| **Data transfer**   * Are special measures needed to transfer data from mobile devices, from fieldwork sites or from home equipment to a central work server? |  |  |
| **Data description and Metadata**   * Are data in a spreadsheet, database or data warehouse clearly marked with variable, variable labels and value labels, code descriptions, missing value descriptions, etc.? * Are validated questionnaires and standard coding used? * Are labels consistent? * Are files, records and items in the collection clearly described with well-defined metadata or a metadata standard to interpret the relations between them and to quickly select and understand the content. * Do textual data like interview transcripts need description of context, e.g. included as a heading page? |  |  |
| **Documentation**   * Do you have documentation for the data that describes the context and methodology of how data were gathered, created, processed and quality controlled? |  |  |
| **Data backup**   * Does the institution provide regular backup or not? * Consider how frequently backups should be done, how many backups should be stored. |  |  |
| **Data storage**   * How much data storage space is needed for the entire duration of the project? * Do you need to set up a data model and accompanying database for the data? |  |  |
| **Data Access**   * Do external people require access to research data? |  |  |
| **Data security**   * Is there an institutional server available where you can store your data safely? * Protect data from unauthorised access or use or from disclosure |  |  |
| **File format**   * Do data need to be converted to a standard or open format with long-term validity for long-term preservation? |  |  |
| **Anonymisation**   * Do you need to remove identifying information or conceal the identity of participants (e.g. using pseudonyms) before data can be shared? * Anonymisation needs to be consistent throughout a data collection. |  |  |
| **Copyright**   * Do other parties hold copyright in the data? * Do you need to seek copyright clearance before sharing data? |  |  |
| **Data sharing**   * Will your data be deposited with a data centre or institutional repository? * Which requirements exist to prepare data to particular standards e.g. regarding documentation or format? * Do structured metadata need to be created when data are shared via a data centre or archive, e.g. completing a deposit form for the UK Data Archive? * What data will be retained and what not? |  |  |
| **Data cleaning**   * Do quantitative data need to be cleaned, checked or verified before sharing, e.g. check validity of codes used, check for anomalous values? * Will data match documentation, e.g. same number of variables, cases, records, files? * Does textual information in data need to be spell-checked? * Do you need to combine your data with other datasets for your research |  |  |
| **Digitisation**   * Do analogue or paper-based research data (maps. newspaper clippings, photographs, images, text) need to be digitised to increase their potential for sharing? |  |  |
| **Roles and responsibilities**   * Do you need to allocate roles and responsibilities for various data management activities? |  |  |
| **Operationalising data management**   * What measures are needed to implement and operationalise data management throughout the research lifecycle? |  |  |