# Research Data Management Onboarding Checklist

**Purpose**: To provide a general, research data management-focused guide for researcher onboarding as they join a new lab or begin a new project. This section provides two checklists that can be used to assist in navigating critical steps for the research:

* + Join a new project
  + Join a new lab

**Scope:** All student, faculty, and staff that support or directly work on a new research project or lab

**Join a New Project**

Stage: Planning

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Transfer prior data and related records to the university (if relevant) | Contact the Office of Research and Sponsored Programs | [Office of Research and Sponsored Programs](https://www.marquette.edu/research-sponsored-programs/) |
| Review project and granting institution requirements | Most government funding agencies have published guidelines. If the researcher has non-federal funding, check with the granting agency/award agreement. | * [NSF Data sharing Policy](https://www.nsf.gov/bfa/dias/policy/dmp.jsp) * [NIH Data Sharing Policy](https://sharing.nih.gov/data-management-and-sharing-policy/about-data-management-and-sharing-policies) * [NIH Public Access Policy](https://publicaccess.nih.gov/policy.htm) |
|  | For projects involving human subjects research, review any project-specific requirements stipulated by Marquette’s Institutional Review Board (IRB). | [Marquette IRB](https://www.marquette.edu/research-compliance/irb/) |
|  | For projects involving animal research, review any project-specific requirements stipulated by Marquette’s Institutional Animal Care and Use Committee (IACUC). | [Marquette IACUC](https://www.marquette.edu/research-compliance/iacuc-about.php) |
| Write a DMP or review existing DMP | Construct a data management Plan (DMP) | [Raynor Memorial Libraries DMP Tool](https://www.marquette.edu/library/dataplan/) |
| Create a data workflow or review existing data workflow | If applicable, review existing project workflows and directory structures |  |
|  | Develop project specific workflows and directory structures | “The guide” Phase 2: collect and create |
|  | Assess using an electronic lab notebook | 3.6.2 Lab Notebooks |
|  | Establish controlled vocabulary / metadata or adapt existing controlled vocabulary |  |
| Create preliminary ReadMe file(s) for each project dataset | Document the data workflow(s) in a ReadMe file. The metadata will help ensure the data is understandable, usable, discoverable, and reproducible. | “The guide” 3.4.4 ReadMe files | |

Stage: Storage

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Review storage options | Review storage resources in place for the existing project or choose relevant storage options for a new project. | Phase 4: store and manage |

Stage: Sharing

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Review intellectual property policy | Review Marquette intellectual property policy | [Intellectual Property Policy](https://www.marquette.edu/orsp/documents/IntellectualPropertyPolicy.pdf) |
| Review publisher and funder requirements | Understand funder and/or publisher data sharing requirements, if applicable | [NIH Public Access Policy](https://publicaccess.nih.gov/policy.htm)  [NSF Public Access Policy](https://www.nsf.gov/pubs/2016/nsf16009/nsf16009.jsp) |
| Review available collaborative tools | Review collaborative tools already in use for an existing project or choose relevant tools for a new project | “The Guide” Phase 3: analyze and collaborate |
| Review potential data repositories | Review public data repositories already established for an existing project or choose a relevant data repository for a new project |  |
|  | Develop a new data repository for the project, if applicable | “The Guide” Phase 6: share and disseminate |

**Join a New Lab**

Stage: Planning

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Review data management plan (DMP) policies | Review DMP guidance | [Raynor Library DMP Tool](https://www.marquette.edu/library/dataplan/) |
|  | Understand data retention and destruction of records guidance | “The Guide” 3.10.1 Data retention types |
|  | Review information security guidelines | [MU IT Services page](https://www.marquette.edu/its/help/) |
| Create a preliminary data workflow | Review existing lab workflows and directory structures |  |
|  | Develop a preliminary organizational workflow for the research, including a file (or directory) structure | “The Guide” Phase 2: collect and create |
| Create preliminary ReadMe file(s) for each dataset | Document the data workflow(s) in a ReadMe file. The metadata will help ensure the data are understandable, usable, discoverable, and reproducible. | “The Guide” 3.4.4 ReadMe files |

Stage: Storage

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Review storage options | Review storage resources in place for the existing project or choose relevant storage options for a new project | “The Guide” Phase 4: store and manage |

Stage: Sharing

|  |  |  |
| --- | --- | --- |
| **Focus areas** | **Key steps** | **Reference points** |
| Review intellectual property policy | Review Marquette intellectual property policy | [Intellectual Property Policy](https://www.marquette.edu/orsp/documents/IntellectualPropertyPolicy.pdf) |
| Review available collaborative tools | Review collaborative tools already in use for an existing project or choose relevant tools for a new project | “The Guide” Phase 3: analyze and collaborate |
| Review potential data repositories | Review public data repositories already established for an existing project or choose a relevant data repository for a new project. | “The Guide” Phase 6: share and disseminate |