Documentation in the Middle: Active Phase
Project Documentation for Inclusive and Effective Team-Based Research

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Problem Statement

Documentation is an essential component of good data management yet data service providers often struggle to provide effective support to researchers. Team-based and multi-disciplinary research create increased opportunity for misunderstandings impacting quality, efficiency of research, and researcher experience.

Materials exist for creating or assisting researchers with documentation at the beginning and end of a project; from data management plans to documenting data for archival purposes. However, there is a lack of materials to assist researchers during the active phase of a research project.

Researchers need assistance with improving their documentation practices to improve shared understanding about:

- Research team roles
- Research protocols
- Workflows
- Processes and procedures

Interactive Tool: Worksheet
Use for researcher self-assessment or data service provider-led interview

The Tool

U-M Librarians collaborated to create a new tool for documenting the active phase of a research project. We will continue to refine the tool based on further investigation and analysis of real and ideal documentation practices within research teams.

Our goal is to identify the basic considerations that any researcher from any discipline should consider for their local documentation in support of team-based research projects.

Project Manual Documentation Template

1. Project Overview
- Summary of Research
- Roles and Responsibilities
- Individual Team Member Documentation

2. Project Management and Organization Plan
- Folders and Files
- Storage and Backup

3. Data Collection & Processing Documentation
- Data Collection Methods
- Data Processing Methods
- Metadata
- Sensitive Data Considerations

4. Data Analysis Documentation
- Data Analysis Methods
- Dataset Versioning
- Master Dataset Rules

Interactive Tool: Inventory
Use for researcher self-assessment

Applications & Benefits

The Project Manual Documentation Template can be used as an interactive tool to promote:

- Inclusion
- Communication between team members
- Consistency and efficiency in collaborative research
- Improved onboarding of new team members
- Structures something that everyone can understand
- More clarity than oral instructions
- Creates shared reference points to answer questions arising

Additionally, data service providers can use the Project Manual Documentation Template as a teaching tool in data management instruction.

A “lab manual” or “project organization protocol” will enhance the effectiveness and efficiency of research teams, while creating an inclusive environment by making local practices and expectations clear to all team members regardless of previous research experience and disciplinary background.