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?		