THE BATON PASS: PREPARING YOUR DATA FOR THE HAND-OFF

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Harvard FAS Informatics Group

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ONBOARDING

Will you house sit for me for the next 2 months?

- Feed my cats
- Feed my dogs
- Walk my dogs
- Make sure they get to their vet appointments!
- Keep my plants alive
- Keep everything in good repair

Will you house sit for me for the next 2 months?

- Feed my pets
  - *Fluffy: Purina cat chow 200g/day*
  - *Baxter: ScienceDiet dog food 300g/day*
  - *Boo: Purina puupy chow 300g twice a day*
  - *Food is in kitchen shelf left of fridge*
- Walk my dog
  - *map.jpg of routes & dog parks*
- Plant care
  - *watering schedule attached to each pot*
- Contact info:
  - *vet: vet_name@vet.com*
  - *repair person: bob@builder.com*
  - *lawncare company: lawns@lawnsome.com*
- Cash to buy goods & services in desk drawer top
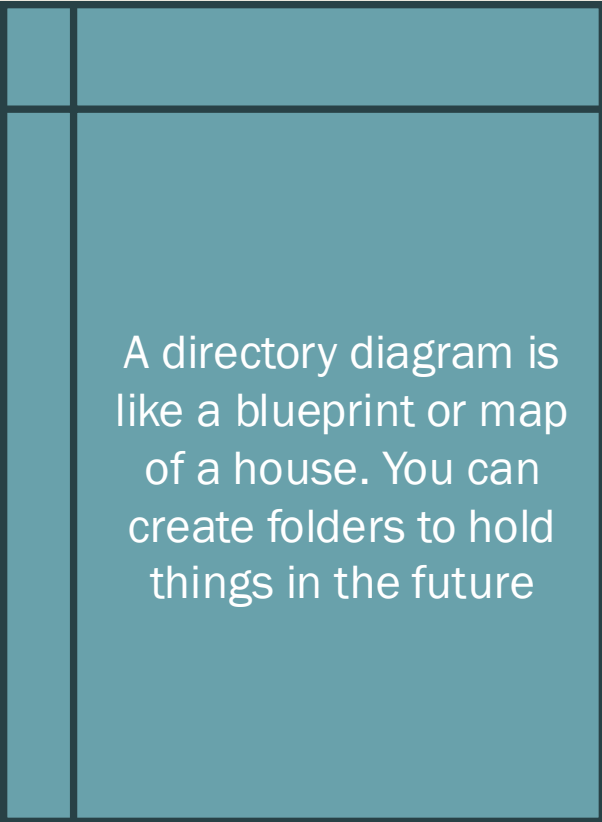
Research Data Onboarding

- Where is the data and how to access it?

- What is the data management plan for the project?

- What are the requirements for data sharing?

- How do you collaborate with your coauthors?

- Where is the metadata and what do the fields mean?

What did you have to learn when you started your project? (don't include domain knowledge)

What is your directory structure?

- Hint: You can use the unix tree command to list your directories

- You can use pen and paper, or a drawing tool like draw.io (https://app.diagrams.net/)

A directory diagram is like a blueprint or map of a house. You can create folders to hold things in the future

Onboarding documents answer questions about your project

- Go over the onboarding document template

- Template

- Example

OFFBOARDING

Leaving for vacation checklist

- Put key in lockbox

- Clean & put away laundry

- Take out the trash

- Organize plants, pet food, leashes, etc

- Inform contacts

- Print out house-sitting document and leave it out

Your offboarding is someone else's onboarding

Offboarding checklist

- See example

- Make your own additions →
  - Transfer data to your new organization

Best practices for folder organization

- Helps you during your work & helps you pass on your work

- Raw Inputs/Path from Input to output (scripts)/Output

- Change your raw data so it's read only !!

- Use git to snapshot your code and backup to GitHub

- At minimum:
    - *README to keep track of input/code/output. Keep only files in README*

Closing shop: how to create a knowledge transfer document

- If you have an onboarding document, it's already mostly there!

- Add info about laboratory materials, protocols, lab notebooks, presentations/posters

- Additional focus on "next steps" and methods

- See HMS RDM Knowledge Transfer File

- See KU Leuven checklist for research data handover

- See FASRC Offboarding policies and procedures

Your next steps

- Fill out your own onboarding document and add specifics to your offboarding checklist

- Come to an office hours or set up a meeting with us with questions and comments (and your draft documents) to receive one-on-one help/advice