

ELD-OSF Operational Documentation Guideline

PREFACE

This Guideline provides instructions, guidelines, and policies and procedures regarding the maintenance of the ELD operational documentation on the Open Science Framework (OSF) platform, henceforth referred to as ELD-OSF.

This Guideline was developed by a working group convened in 2022 led by the Division Chair. The working group included the ELD Division Chair, Archivists, and the Web Committee Chair.

Definition

These Guidelines are used for establishing an overarching ELD-OSF site and ensuring its maintenance. The ELD-OSF site includes the operational documents of the ELD leadership (officers and committee chairs), the ad-hoc ELD groups, and the ELD webinar recordings. This site is linked to the ELD-ASEE conference slides OSF website.

OSF is a free, open-source cloud-based platform created and maintained by the Center for Open Science. OSF facilitates the management of all types of documents and files organized in a customizable structure, and the sharing between collaborators. OSF integrates with local services like Box, Drive, Github, etc. for active collaborations, and preserves the final version of the documents on OSF storage. Documents can be shared privately or made publicly accessible.

Scope

- To create a curated space for the ELD Leadership operational documents to inform ELD's future activities.
- Maintain a logical, consistent, and predictable folder structure and file naming system to facilitate easy access to the ELD Leadership operational documents.

Benefits

- Ensure easy access to all documents needed for running the division
- Retain all operational documents for future reference
- Ensure a smooth transition between the leadership of different ELD committees
- Preserve the history of ELD decisions
- Facilitate committees' work by providing a collaborative working space

Expectations

All ELD officers and Committee Chairs are responsible for the maintenance and development of the operational documents in accordance with these Guidelines. The responsibilities include:

- Within 30 days after the Annual Conference, all the final versions of the documents as outlined by the Guideline should be transferred to OSF storage
- Within 30 days after the Annual Conference, collaborate with ELD Web Committee and ELD Archivists to give or transfer access rights to the incoming Officers/Chair(s)

- Within 30 days after the Annual Conference, the Web Committee will schedule an OSF training session for the incoming Officers and Chairs
- Maintain the Officer/Committee activity record
- Maintain folder hierarchy and naming convention
- Ensure privacy by not sharing documents that are out of the scope of these Guidelines
- Ensure compliance with the Guidelines

Content

Per these Guidelines, documents to be included on the OSF platform are:

- Leadership policies, procedures, guidelines
- Meeting minutes
- Information on ongoing projects
- ELD Webinars recordings

Public-facing documents shall be posted on the ELD website and collected for the Archives.

Documents with private information (e.g., peer reviewers' assignments and feedback, personal information, credit card or bank account information) shall be excluded from this site.

The Archivists will have administrative rights and are responsible for collecting the documents fitting the Archives' selection criteria.

ELD-OSF Site






OSF Vocabulary

Project: the largest category in OSF. For the ELD-OSF site, Projects represent the main building blocks of the organizational hierarchy. Each Project has custom privacy settings and contributors. Examples include: ELD Webinars, ELD Officers, ELD Committees, and ELD Conferences.

NOTE. The overall ELD OSF structure can be edited only by the ELD Web Committee members.

Component (also called sub-project or "child" project): used to create a hierarchy within the parent project. A Component's privacy settings, contributors, tags, wikis, add-ons, and files are separate from the parent project. Examples include: ELD X Committee Webinars, Secretary/Treasurer, Committee X, etc.

Components Add Component Link Projects

| | |
|---|-----|
|  ELD Accreditation and Standards Committee <small>Division</small> | ✕ 📄 |
|  ELD Professional Development Committee <small>Division, Drees & DeSart</small> | ✕ 📄 |
|  ELD Scholarly Communications Committee <small>Division, Bhatt, Painter & 13 more</small> | ✕ 📄 |
|  ELD Communications Committee <small>Division & Wetzel</small> | ✕ 📄 |
|  ELD Publications Committee <small>Division, Over & Zhang</small> | ⋮ |

Wiki: a page within a project or component that gives details on the scope and types of documents included.

Wiki 🔗

Add important information, links, or images here to describe your project.

Readme: a document that provides information about files that are logically grouped together for use; and is intended to help ensure that the file can be correctly interpreted, by yourself later or by others. Readme can be added to the Wiki.

Folder: space created on OSF storage to hold documents

Files 🔗

Click on a storage provider or drag and drop to upload

🔍 📘

| Name ^ v | Modified ^ v |
|--|---------------------|
| 📁 ELD Webinars | |
| - 🌐 OSF Storage (United States) | |
| - 📁 ELD Professional Development Committee Webinars | |
| 📄 Cool Tools Webinar (Sept 2022).mp4 | 2023-03-03 12:18 PM |
| 📄 ELD Committees Intro Webinar (March 2022).mp4 | 2023-03-03 12:24 PM |
| + 📁 Getting Started with LaTeX and Overleaf (March 2023) | |
| + 📁 Technical Standards (Nov 2022) | |

ELD-OSF Site Structure

- ELD Webinars (Public Project)

This Project will bring together all committees' recordings intended for public access. The Chair(s) of the organizing committee will be added as a contributor to the ELD Webinars. The Chair will deposit the recording in a designated folder for the Committee. Each recording should include complete metadata: title, description, date, and presenters.

- ELD X Committee Webinars (Folder)
 - YYYY-MM_Webinar Title (Public)

- ELD Officers (Public Project)

Serves as a space dedicated to the ELD officers. This space will be used to post updated guidelines, ELD documents (e.g, ledgers), and any officers' specific activities documents as needed.

- Secretary/Treasurer (Private Project)
 - Guidelines Treasurer (Folder)
 - GuidelinesTreasurer_Revised YYYY
 - Ledger (Folder)
 - Ledger_FY YY-YY
- Program Chair (Private Project)
 - Guidelines Program Chair (Folder)
 - Guidelines_Revised Yyyy
 - Annual Program Chair (Folder)
 - Yyyy-yyyy_LastNameFirstName (Folder)
 - Planning Committee members
 - PC meeting minutes
 - Other planning documents
- Division Chair (Private Project)
 - Guidelines Division Chair (Folder)
 - Guidelines_RevYyyy
 - Annual Division Chair (Folder)
 - Yyyy-yyyy_LastNameFirstName (Folder)
 - Project X folder (if necessary)

- Director (Private Project)
 - Reception_Revised YYYY
 - Banquet Planning_Revised YYYY

- ELD Committees (Public Project)

Space devoted to individual ELD committees. Each committee's space should include information on annual activities (members, meeting minutes, projects). Public documents created will be posted on the ELD website.

- Committee X (Private Project)
 - Yyyy-yyyy (Private Folder - Only current committee members)
 - Committee members
 - Committee meeting minutes
 - Project folder(s)

- ELD Task Force Groups (Public Project)

Space dedicated to special ELD projects that do not belong to a specific committee. Examples include the bylaws task force, the ELD unconference committee, etc. The final public documents resulting from these groups should be posted on the ELD website, as needed.

- Yyyy-yyyy Task Force (Private Component)
 - Charter
 - Membership
 - Project documentation

- ELD Annual Conference Slides (Public Project)

- ELD Conference Slides, 2020- present
 - 2020: <https://osf.io/meetings/ELD2020/>
 - 2021: <https://osf.io/meetings/ELD2021/>
 - 2022: <https://osf.io/meetings/ELD2022/>
- ELD Conference Slides, pre-2020: <https://osf.io/xkjh8/>

Best Practices

When creating folders and files, we prioritize usability. We consider first and foremost how others will use and learn from our documentation in the future.

- The overall maintenance will be ensured by the website committee
- The Web Committee maintains administrative rights for all site

- The Web Committee creates all the site components and assigns the initial administrative/editing rights as needed
- Archives Co-Chairs will have admin rights for the whole site, monitor it, and collect any digital documents of interest to the Archive
- Individual access to site components is transferred between exiting and incoming officers/committee chair(s) at the time of transition, including the website committee, during the onboarding process
- Exiting officers/committee chair(s) will transfer all the committee's final documents to the corresponding OSF storage at the end of their term except for the documents that are not intended to be public (personal emails, list of peer reviewers, peer reviewers' feedback, etc.)
- The committee chair(s) creates the structure of the Committee folders based on agreement from the committee members.
- All new projects/components/folders should include a ReadMe document to go along with it. The ReadMe document should describe the content to make it easy to understand. The name of the ReadMe document should be in CamelCase like all other file names, with the name of the folder appended. For example, ReadMe_Program Chair is the name of the ReadMe file in the top-level Program Chair folder.
- Except for ReadMe documents, all other documents should be part of the existing folder hierarchy
- Committees may choose the preferred platform for active collaboration (i.e., Google Drive, Box, private OSF space), and members should have edit access as needed. Qualifying final documents that are not to be further edited should be in OSF storage.
- Do not include special characters (\ / < > | " ? [] ; = + & £ \$) in folder names or document names. Although your operating system may allow you to use these characters, not all operating systems do. Therefore, others may encounter difficulties searching for or opening folders or files with names containing these characters.

Last Revised June 22, 2023