

Sample Private Dossier

RESEARCH PROJECT CONTINUITY

FICTIONAL / COMPOSITE

This public sample does not describe a real client, institution, committee, dissertation, or research file. It is a composite demonstration of how a private monthly dossier can hold sources, decisions, open questions, and next steps together.

BUILT FOR

Composite Research Desk

A doctoral or research-heavy reader in the middle of a long project.

The central need is continuity: what has been read, what has been decided, what remains unsettled, and what should be prepared next.

NUMBERED SOURCES VERIFIED FOR PUBLIC SAMPLE USE

No real client data. No hidden committee feedback. No submitted writing reproduced.

ContinuityDesk.io

THE WORK IS NOT ONLY THE WRITING

CARRYING LOAD

What tends to scatter

- source notes without status
- committee comments without decision history
- promising articles with no assigned job
- theory options that sound compatible but compete
- next steps that are too large to start

Continuity ledger

For each live thread: last touched, current status, next use, decision needed, and overclaim risk.

Reader move

Convert a vague task like read more into a named task: read to define, read to compare, read to rule out, or read to prepare a question.

What this sample does not do

It does not write a dissertation chapter, replace an advisor, certify compliance, or claim that a composite reader has a real committee.

A long research project becomes difficult to carry when too many unstable objects live in the reader's head at once: source piles, half-decisions, committee comments, methods language, terms that keep changing, and questions that look settled until the next meeting.

The continuity problem is not a failure of discipline. It is a project-design problem. A reader can be thoughtful, serious, and organized and still lose the thread when every document asks to be treated as equally urgent.

The first job of a dossier like this is not to produce the researcher's argument. It is to keep the project legible enough that the next reading session, advisor conversation, and revision pass do not begin from scratch.

The Carrying Problem

The carrying problem has three parts. First, the reader must remember what was already decided. Second, the reader must recognize which new sources alter those decisions. Third, the reader must know which next action is small enough to begin but consequential enough to matter.

When those parts are not separated, a project creates false motion. The reader rereads old material, reopens decisions that were already resolved, or treats a committee comment as a command before deciding whether it is a question, a caution, or a revision requirement.

Summary Is Not Enough

A literature review becomes useful when it does more than summarize sources. Purdue OWL describes synthesis as drawing connections between sources so the reader can see the scholarly conversation over time.¹³ In continuity terms, that means each source needs a role: what it explains, what it complicates, what it cannot support, and where it should be revisited.

The dossier therefore treats a source note as unfinished unless it can answer at least one practical question: where does this source belong, what claim could it support, what claim would overread it, and when should it be returned to?

Organization Is Interpretation

Source organization is not clerical housekeeping. Zotero's documentation distinguishes collections from tags and notes that tags can mark topic, method, status, rating, or workflow role.¹⁴ That matters because the same article may be a methods example, a background source, a caution, and a future re-read.

A continuity system should not force one source into one folder and then forget the rest of its uses. It should preserve several relationships at once: topic, method, evidence type, status, and decision relevance.

The practical standard for a continuity dossier is simple: if the reader opens the file a month later, the project should still know what it was trying to do.

SOURCE CARTOGRAPHY

A source map is different from a bibliography. A bibliography says what has been gathered. A source map says what each source is allowed to carry.

That distinction protects the project from two familiar mistakes. The first is using a source because it is famous rather than because it answers the current question. The second is letting a source do more work than its evidence, method, or genre can support.

The Claim Ledger

A useful research dossier keeps claim strength visible. AERA's research conduct page frames reporting standards as educational guidance for high-quality empirical reporting across social science methods.¹ Reporting libraries and appraisal tools add a second layer: they help identify which checklist, standard, or appraisal route fits the source type before the source is allowed to carry a claim.^{4,10,11}

In a private desk context, that becomes a practical ledger: claim, source, evidence type, limitation, and decision status.

A ledger is not a bureaucratic add-on. It is how a serious project prevents drift. If the claim is conceptual, the ledger should show which source defines the construct. If the claim is empirical, it should show the kind of evidence. If the claim is interpretive, it should show the warrant and the limit.

Four Source Jobs

Anchor sources carry load-bearing claims. They should be few enough to inspect closely.

Context sources explain the field, history, terminology, or institutional setting. They should not be asked to prove the central finding.

Method and standard sources clarify how the project should report, compare, protect, or interpret evidence.

Open leads are not failures. They are parked questions with enough metadata to return to later.

The Overread Column

Every serious source map needs an overread column. It names the tempting claim a source cannot support. A policy report may describe infrastructure without proving experience. A theory article may define a construct without showing local fit. A methods guide may clarify design language without deciding the project for the reader.

The Return Column

The return column keeps promising material alive without letting it interrupt the current decision. It can mark a source for later use in background, theory, methods, discussion, or committee preparation.

The monthly value is not that everything is already known. It is that uncertainty stops being shapeless.

SOURCE MARKS

Anchor

Can support a central claim after close reading.

Support

Useful for a narrower point, example, definition, or contrast.

Caution

Important but method-limited, outdated, indirect, or easy to overread.

Open Lead

Not ready to cite. Worth returning to because it may answer a later version of the question.

Overread

The claim the source makes tempting but does not actually support.

Return

A note to revisit when the project reaches a different stage.

Reader Test

Could someone explain why this source is here without rereading the whole project?

DECISION LAB: FRAMES THAT COMPETE

FRAME TEST

Keep a frame if it changes

- the wording of the research question
- what counts as evidence
- how sources are grouped
- which limitations matter
- what must be protected or not overclaimed

Retire a frame if it only

- decorates the literature review
- repeats a more precise concept
- gives the project prestige but no analytic work
- makes the method harder to defend

Decision note

Keep one sentence for why the frame stays, one for what it cannot explain, and one for what would make the choice weaker.

Committee-ready version

The framework is not a label. It is the reason these questions, sources, and limits belong together.

At the middle of a research project, the theory problem is rarely absence. It is abundance. Several frames may be plausible. Several may sound sophisticated. The question is which one changes the work in a way the reader can defend.

A frame earns its place by doing a job. It might name the central construct, explain a mechanism, set a boundary, protect an equity or ethics dimension, or clarify what kind of evidence would count as support. Reporting standards are useful here because they expose method fit: quantitative, qualitative, mixed-methods, interview, observational, and protocol-driven projects do not ask the same things of evidence.^{2,3,7,8,9}

The decision should be made in public to the project file, even if it remains private to the reader. That means recording why a frame is being kept, what it will not be asked to do, and what evidence would make the decision weaker.

Frame A: Experience

An experience frame asks what participants, practitioners, or texts reveal about meaning. It can be strong when the project needs depth, language, and context. It becomes weak when it avoids institutional, historical, or structural explanation.

Frame B: Institution

An institutional frame asks how rules, routines, policies, or professional cultures shape what becomes possible. It can keep responsibility visible, but it can flatten lived experience if the project forgets how people navigate those conditions.

Frame C: Pathway

A pathway frame asks how someone moves from one stage to another and where continuity breaks. It is useful for projects about persistence, transfer, adoption, implementation, or identity development. Its risk is becoming a flowchart when the real work is relational or interpretive.

What Changes If It Wins

The winning frame should change the project materially. It should alter which sources become central, which terms need defining, how findings would be grouped, and what a committee question is really asking.

If two frames make the same paragraph sound slightly different but do not change evidence, method, or interpretation, one of them is decoration.

If a project involves people, ethics cannot sit at the end as paperwork. The Belmont Report is a public anchor for respect for persons, beneficence, and justice in human subjects research.¹⁹ The dossier does not provide protocol advice; it keeps the ethics question visible while the research design is still taking shape.

NEXT-STEP ARCHITECTURE

The next cycle should not mean simply reading more. More reading is sometimes necessary, but it can also become a way to postpone decisions. A continuity desk should convert reading into materials the project can act on.

Prepare The Next Meeting Packet

The packet should be small enough to use. One page can hold the current question, the strongest source clusters, the main decision still unresolved, and the next action. That is not the whole project. It is the part of the project that must not be lost.

Separate Three Kinds Of Work

Reading work: what must be understood before a claim can be made.

Decision work: what must be chosen, narrowed, deferred, or retired.

Draft work: what can be written without pretending unresolved decisions are settled.

Use A Narrow Sequence

Start with retrieval: what notes, sources, or comments must be visible before anything changes. Move to decision: what can now be chosen, deferred, or named as unresolved. End with production: what artifact can be created without inventing certainty.

For review-heavy projects, PRISMA, PRISMA-ScR, and the Cochrane Handbook show how search, scope, inclusion, and reporting decisions can be made traceable without pretending that every review has the same purpose.^{5,6,12}

Open science discussions often emphasize traceability across the research life cycle.¹⁷ A private dossier can borrow that discipline without making every document public: keep the path from source to claim to decision visible. Registration tools, living documentation, FAIR principles, and metadata standards point toward the same practical habit: record enough of the project's decisions that later readers can understand what changed and why.^{15,16,18,20}

Avoid The Productive Fog

The attractive trap is adding sources to feel motion. The better move is to assign each source a job, test whether that job still matters, and remove or park the ones that no longer serve the current question.

The most useful next step is often not the largest one. It is the step that reduces ambiguity: a table, a narrowed question, a decision memo, a source-status pass, or a short list of claims that cannot yet be made.

By the end of the next cycle, the reader should have fewer open loops, not merely more notes.

NEXT CYCLE

Bring forward

- one clean question map
- one source-status table
- one decision note naming what changed
- one caution list for claims that are not ready

Do not bring forward

- every interesting quotation
- every committee comment as equal priority
- a framework that has not earned a job
- a reading list with no decisions attached

Archive without losing

Move interesting but inactive material to a return list with a reason, not to the center of the next work session.

Strong finish

The next action should be narrow enough to begin in one sitting and meaningful enough to change the project state.

SOURCE APPARATUS I: STANDARDS AND APPRAISAL

SOURCE APPARATUS

These are not decorative citations. They are working instruments: standards, guidelines, and appraisal routes that help a reader decide what kind of claim a source can safely carry.

Access tags describe the linked route. They do not rank quality, authority, or usefulness by themselves.

1. American Educational Research Association. "Standards for Research Conduct." [open page] back to text

<https://www.aera.net/Publications/Standards-for-Research-Conduct>

Role: claim discipline. Use: separates evidence, method, reporting, and warrant. Limit: broad standards, not a design choice.

2. Appelbaum, Mark, et al. "Journal Article Reporting Standards for Quantitative Research in Psychology." *American Psychologist*, 2018. [public record] back to text

<https://pubmed.ncbi.nlm.nih.gov/29345484/>

Role: quantitative reporting. Use: keeps hypotheses, analyses, and conclusions sorted. Limit: psychology-oriented reporting standard.

3. Levitt, Heidi M., et al. "Journal Article Reporting Standards for Qualitative Primary, Qualitative Meta-Analytic, and Mixed Methods Research in Psychology." *American Psychologist*, 2018. [open record] back to text

<https://www.equator-network.org/reporting-guidelines/journal-article-reporting-standards-for-qualitative-primary-qualitative-meta-analytic-and-mixed-methods-research-in-psychology-the-apa-publications-and-communications-board-task-force-report/>

Role: qualitative and mixed-methods reporting. Use: names integrity demands by design. Limit: reporting guidance, not analysis.

Claim Before Checklist

Sources 1-3 help decide what kind of claim the project is making before it reaches for a specialized standard. Use them to prevent a method section from becoming label-driven.

Claim state markers: conceptual definition, empirical finding, reporting standard, design convention, ethical boundary, or project-management support.

If the source is a standard, its job is to discipline how the claim is reported. If the source is an empirical article, its job is to support a narrower evidence claim.

Misuse To Avoid

Do not cite a reporting standard as evidence that a phenomenon exists. It governs how a study speaks; it does not supply the finding.

Return Condition

Return to these sources when a draft sentence starts sounding stronger than the evidence underneath it.

Ledger Rows

Claim: the sentence or section this source may support.

Evidence type: standard, empirical source, method guide, ethics anchor, or infrastructure.

Warrant: why this source belongs beside this claim.

Limit: the claim this source cannot carry.

Return: the project moment when this source becomes useful again.

Sample Note

Use JARS when the draft needs reporting clarity; do not use JARS to justify the underlying research question.

4. EQUATOR Network. "Reporting Guidelines." [open page] back to text

<https://www.equator-network.org/reporting-guidelines/>

Role: guideline finder. Use: routes projects toward method-specific reporting standards. Limit: health-research tilt; adapt carefully.

5. PRISMA. "PRISMA 2020 Statement." [open page] back to text

<https://www.prisma-statement.org/prisma-2020>

Role: review transparency. Use: checklist and flow diagram logic for systematic review reporting. Limit: not every review is PRISMA.

6. PRISMA. "PRISMA Extension for Scoping Reviews." [open page] back to text

<https://www.prisma-statement.org/scoping>

Role: scoping-review reporting. Use: maps concepts, sources, and gaps. Limit: useful only if the project is actually scoping.

7. Tong, Allison, Peter Sainsbury, and Jonathan Craig. "Consolidated Criteria for Reporting Qualitative Research (COREQ)." EQUATOR Network record. [open record] back to text

<https://www.equator-network.org/reporting-guidelines/coreq/>

Role: interview/focus-group reporting. Use: tracks setting, sample, coding, and researcher role. Limit: not universal qualitative guidance.

Finding The Right Standard

Source 4 is the routing table. Sources 5-7 narrow the route when the project is review-heavy, scoping, qualitative, mixed-methods, or interview-based.

Routing sequence: identify study family, select reporting standard, check required items, mark the items that do not apply, then explain why.

The dossier should record the non-fit as carefully as the fit. A checklist item skipped with a reason is better than a checklist silently ignored.

Decision Yield

The useful output is a defensible sentence: this project will report this kind of evidence under this family of expectations.

Source Upgrade

After the reporting route is chosen, the next source pass should replace generic methods language with design-specific terms.

Routing Notes

PRISMA 2020: systematic review reporting.

PRISMA-ScR: mapping concepts, evidence, and gaps.

COREQ: interviews and focus groups.

EQUATOR: when the correct reporting family is unclear.

If none fit cleanly, record the closest fit and the reason for restraint.

Good Apparatus Sentence

This source shapes how the project reports evidence; it does not supply evidence for the phenomenon itself.

8. STROBE Initiative. "Strengthening the Reporting of Observational Studies in Epidemiology." [open page] back to text

<https://www.strobe-statement.org/>

Role: observational reporting. Use: separates planned, done, found, and meant. Limit: not a quality appraisal instrument.

9. SPIRIT-CONSORT. "SPIRIT-CONSORT Website." [open page] back to text

<https://www.consort-spirit.org/>

Role: protocol/trial contrast. Use: shows how design and reporting can be standardized. Limit: usually irrelevant outside trial logic.

10. Critical Appraisal Skills Programme. "CASP Checklists." [open page] back to text

<https://casp-uk.net/casp-tools-checklists/>

Role: appraisal route. Use: quick study-type questions for critical reading. Limit: checklists support judgment; they do not replace it.

Appraisal Is Not Authority

Sources 8-10 help inspect study type, completeness, and critical-reading questions. They do not convert a weak paper into a strong one.

Appraisal language should stay conditional: useful for background, usable with caveat, method-limited, indirect, outdated, or not claim-bearing.

The strongest move is often downgrading a source's job before it distorts the argument.

Desk Move

Put the appraisal result beside the claim it affects: usable, usable with caveat, background only, or parked for later.

Citation Boundary

A source can be excellent and still irrelevant to the sentence where it has been placed.

Appraisal Terms

Anchor: strong enough to carry a central claim.

Support: useful for a narrower point.

Context: helpful background but not claim-bearing.

Method-limited: usable only with caveat.

Indirect: relevant by analogy, not proof.

Rejected: not for this claim.

Quiet Value

Downgrading a source before it distorts the argument is useful work.

SOURCE APPARATUS II: CONTINUITY INFRASTRUCTURE

SOURCE APPARATUS

The second half of the apparatus moves from appraisal into project memory: review architecture, source management, registration, living documentation, ethics, openness, and metadata.

A strong desk does not simply gather sources. It records what each source is for, when to use it, and when to leave it alone.

11. JBI. "Critical Appraisal Tools." [open page] [back to text](https://jbi.global/critical-appraisal-tools)
<https://jbi.global/critical-appraisal-tools>
 Role: appraisal framework. Use: assesses trustworthiness, relevance, and results across designs. Limit: evidence-synthesis orientation.

12. Cochrane. "Cochrane Handbook for Systematic Reviews of Interventions, Current Version." [open handbook] [back to text](https://www.cochrane.org/authors/handbooks-and-manuals/handbook/current)
<https://www.cochrane.org/authors/handbooks-and-manuals/handbook/current>
 Role: review-method anchor. Use: scope, inclusion criteria, search, synthesis, and certainty. Limit: intervention-review center of gravity.

13. Purdue Online Writing Lab. "Writing a Literature Review." [open page] [back to text](https://owl.purdue.edu/owl/research_and_citation/conducting_research/writing_a_literature_review.html)
https://owl.purdue.edu/owl/research_and_citation/conducting_research/writing_a_literature_review.html
 Role: synthesis writing. Use: distinguishes summary, synthesis, analysis, and evaluation. Limit: writing guide, not field-specific theory.

Review Architecture

Sources 11-13 supply appraisal and synthesis boundaries. They help convert read more into a more precise action: scope, include, exclude, synthesize, evaluate, or defer.

Review-type choices should be named early: narrative review, scoping review, systematic review, integrative review, annotated source map, or methods memo.

Each choice changes how much search transparency, inclusion logic, appraisal language, and synthesis structure the reader should expect.

Boundary

A narrative literature review can borrow discipline from systematic review guidance without pretending to be a systematic review.

Output

The source apparatus should leave behind a short decision record: what review logic was borrowed, what was rejected, and why.

Review Question Check

Am I mapping territory, evaluating evidence, narrating history, synthesizing findings, or building a theory bridge?

Does the method need a transparent search trail, or does it need a defensible conceptual boundary?

Would a committee expect inclusion criteria, or would inclusion criteria overstate what this project is doing?

Borrow Carefully

Search transparency, appraisal language, and synthesis tables can be useful even when the final product is not a formal systematic review.

14. Zotero Documentation. "Collections and Tags." [open page] [back to text](https://www.zotero.org/support/collections_and_tags)
https://www.zotero.org/support/collections_and_tags

Role: source infrastructure. Use: collections plus tags for topic, method, status, and role. Limit: tool documentation, not methodology.

15. OSF Support. "Welcome to Registrations and Preregistrations." [open guide] [back to text](https://help.osf.io/article/330-welcome-to-registrations)
<https://help.osf.io/article/330-welcome-to-registrations>

Role: time-stamped planning. Use: shows when a study plan can become a stable record. Limit: not necessary for every design.

16. OSF Support. "Wiki (OSF Projects)." [open guide] [back to text](https://help.osf.io/article/389-wiki)
<https://help.osf.io/article/389-wiki>

Role: living documentation. Use: versioned project notes, decisions, and workflow memory. Limit: workflow support, not evidence.

17. National Academies of Sciences, Engineering, and Medicine. "Open Science by Design: Realizing a Vision for 21st Century Research." 2018. [open page/report] [back to text](https://www.nationalacademies.org/projects/PGA-OFS-16-02/publication/25116)
<https://www.nationalacademies.org/projects/PGA-OFS-16-02/publication/25116>

Role: research lifecycle. Use: frames openness, traceability, and handoffs across a project. Limit: policy/report framing, not a requirement.

Project Memory

Sources 14-17 are infrastructure: tags, registrations, living documentation, and lifecycle traceability. None of them are field evidence; all of them protect the project from amnesia.

Minimum memory fields: source number, status, role, claim supported, limitation, return condition, and last decision affected.

Infrastructure sources become valuable when they reduce re-reading, duplicated searches, and the familiar panic of not knowing why a source was saved.

When To Use

Use this cluster before a committee meeting, after a scope change, before a draft handoff, or whenever the project has too many undocumented decisions.

Private/Public Split

A private continuity desk can use open-science habits without making private notes public. The point is traceability, not exposure.

Suggested Tag Set

topic: what the source is about.

method: how it knows what it claims.

status: unread, skimmed, read, cited, parked, rejected.

role: anchor, support, context, caution, infrastructure.

return: when to reopen it.

committee: useful for advisor question, defense prep, or limitation language.

Private Note

A source-management system becomes valuable when it records why a source moved, not only where it lives.

18. GO FAIR. "FAIR Principles." [open page] [back to text](https://www.go-fair.org/fair-principles/)
<https://www.go-fair.org/fair-principles/>

Role: reuse standard. Use: metadata, provenance, license, and community standards. Limit: most relevant when outputs need reuse.

19. HHS Office for Human Research Protections. "The Belmont Report." [open page] [back to text](https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/index.html)
<https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/index.html>

Role: ethics anchor. Use: keeps respect, beneficence, and justice visible. Limit: not a substitute for IRB or protocol guidance.

20. DataCite Metadata Working Group. "DataCite Metadata Schema Documentation for the Publication and Citation of Research Data and Other Research Outputs." Version 4.4. [open schema] [back to text](https://schema.datacite.org/meta/kernel-4.4/)
<https://schema.datacite.org/meta/kernel-4.4/>

Role: citation infrastructure. Use: persistent identification and retrieval of research outputs. Limit: technical metadata, not source appraisal.

Reuse, Ethics, Retrieval

Sources 18-20 keep reuse, participant protection, and future retrieval visible. They are not window dressing; they are the guardrails around responsible continuity.

Use this cluster when a project starts producing artifacts other people may inspect: datasets, tables, codebooks, appendices, interview protocols, or shared notes.

The question is not only can this be found later. It is whether it can be understood later without stripping context away from people, claims, or decisions.

Continuity Test

A reader opening the project later should be able to tell what was cited, what was protected, what was deferred, and what would change the next version.

Access Marker

Public does not mean easy. Open page, open report, public record, and technical schema are different retrieval experiences and should be marked separately.

Access Categories

Open page: readable in a browser.

Open report: public but sometimes long or PDF-based.

Public record: metadata is public even if full text is not.

Open guide: usable instructions from a stewarding institution.

Technical schema: public but requires interpretation.

Retrieval Note

A future reader should know whether the link gives evidence, a standard, metadata, or a route to the full source.

CLOSING NOTES / SOURCE USE INDEX

A project is easiest to protect when its uncertainty has names.

This sample dossier has not solved a fictional research project. It has done something smaller and more useful for a monthly continuity artifact: it has separated sources from claims, reporting standards from appraisal tools, decisions from questions, and next steps from general anxiety.

Carry forward the distinction between motion and progress. Motion adds documents. Progress changes what the project can now see, decide, explain, or safely set aside.

Carry Forward

- the current question, not every possible question
- the sources that can carry claims now
- the sources that should be revisited later
- the decision that would make the next work session easier

Source Use Index

Claim discipline: 1

Reporting standards: 2-9

Critical appraisal: 10-11

Review architecture: 5-6, 12-13

Source management: 14, 16

Traceability and reuse: 15, 17-18, 20

Human-subjects ethics anchor: 19

Boundary

The sample is fictional and composite. It contains no real client materials, no private committee feedback, and no submitted writing.

Its purpose is to show the *shape* of continuity: careful memory, traceable sources, clean decisions, and useful next steps.

NEXT CYCLE MEMORY

The apparatus is not the bibliography

The bibliography records what exists. The apparatus records what each source can safely do for the project.

Best next object

A one-page source-status table: source number, role, current use, limitation, and return condition.

What to avoid

Do not let a reporting checklist become a design rationale. Do not let a public guide become evidence for a field claim. Do not let a helpful tool become a citation.

What to preserve

Keep the route from source to claim to decision visible enough that the project can be reopened without losing its place.