Protocol Documentation & Cloning for DELVE Subject Matter Experts

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General MonitoringResources.org Tips

Login to Edit!

If you have a question, check the FAQs, glossary, or training videos.

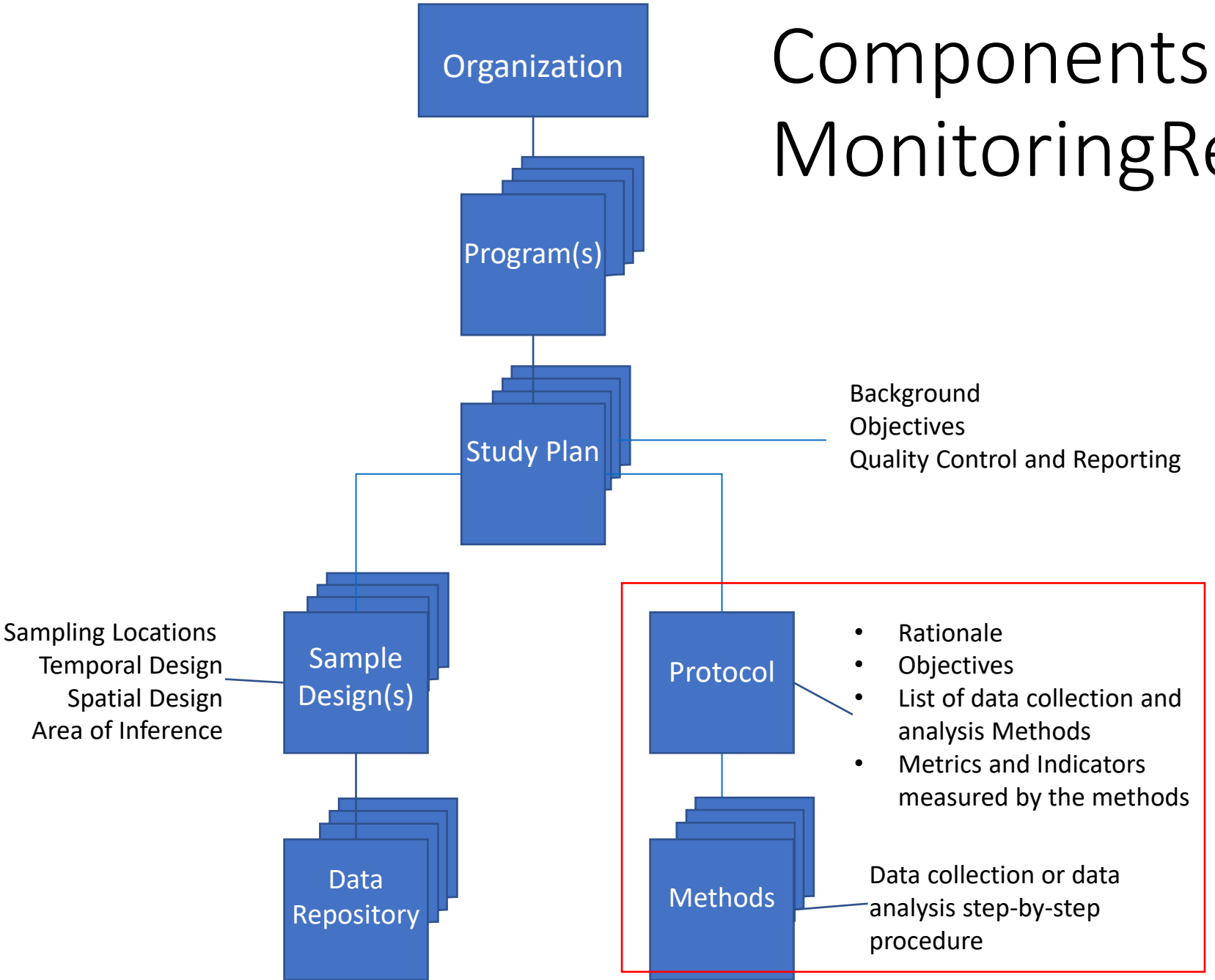
Only owners and colleagues can edit or make new versions.

Components must be Finalized (formerly called “Published”).

You can make new versions or clone finalized content.

Within components, red asterisk fields * are required.

Components of MonitoringResources.org

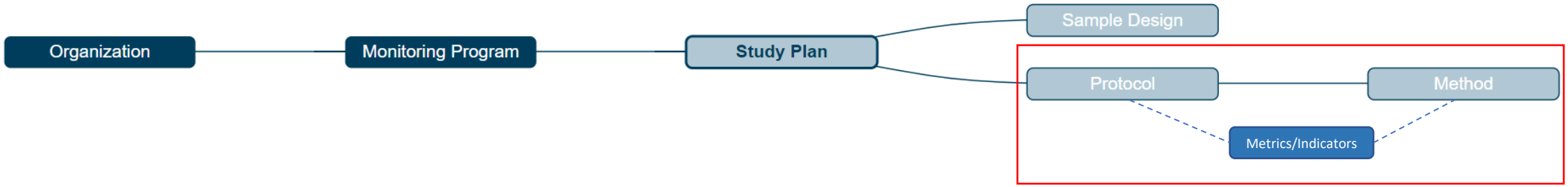


DELVE subject matter experts are responsible for documenting their protocol and method metadata in MonitoringResources.org.

DELVE and Monitoring Resources Vocabulary Crosswalk

DELVE		Monitoring Resources
Project	⟷	Monitoring Program
Data Set	⟷	Protocol
"Fields" of Data Collected	⟷	Metrics/Indicators
File within a Data Set	⟷	Method

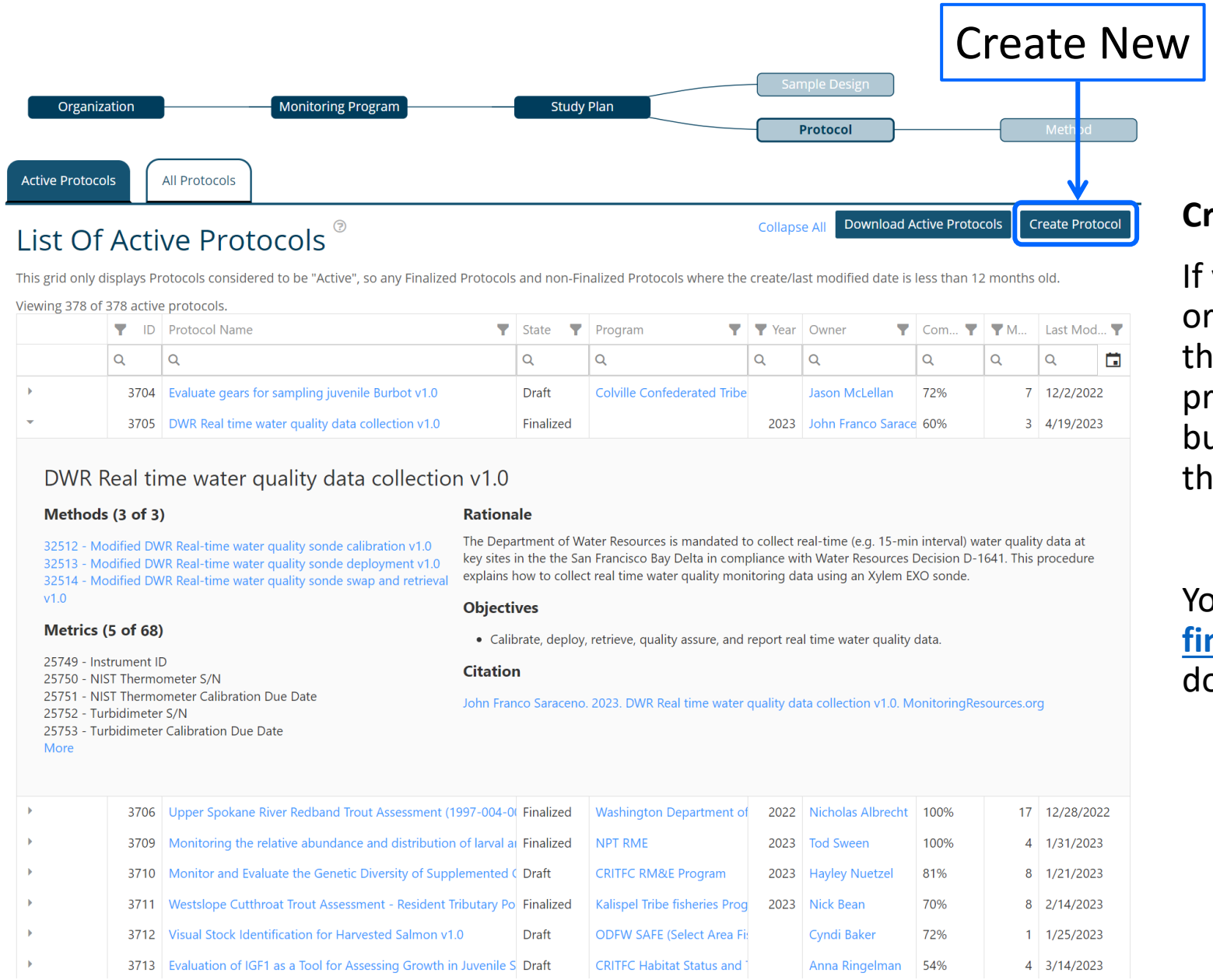
Road map of MonitoringResources.org components:



Tips for Protocols in MonitoringResources.org

- A Protocol describes a planned or proposed approach for conducting work.
- A Protocol contains stepwise procedural methods used to identify/measure variables or parameters. A Protocol can document both data collection and analysis methods.
- A Protocol documents metrics and indicators (the variables and parameters determined from methods) and maps those metrics and indicators to their associated method(s).
- Implementation of your finalized Protocol may vary during the year due to unforeseen circumstances; the protocol does not need to be updated for minor inter-annual variations. Those variations can be documented in annual "Post-implementation Notes".
    - Post-implementation notes should be attached to a finalized Protocol as a **comment** and documented in a finalized annual report. See the Monitoring Resources glossary for full definitions of terms.
- **Version** your Protocol when you modify methods, add or delete methods, or remove a study element (Metric or Indicator).
    - If elements and methodology remain consistent from year to year, Protocols don't need to be updated “versioned”.
    - Only owners of a Protocol can version the protocol.

Create New Protocols



Create new content

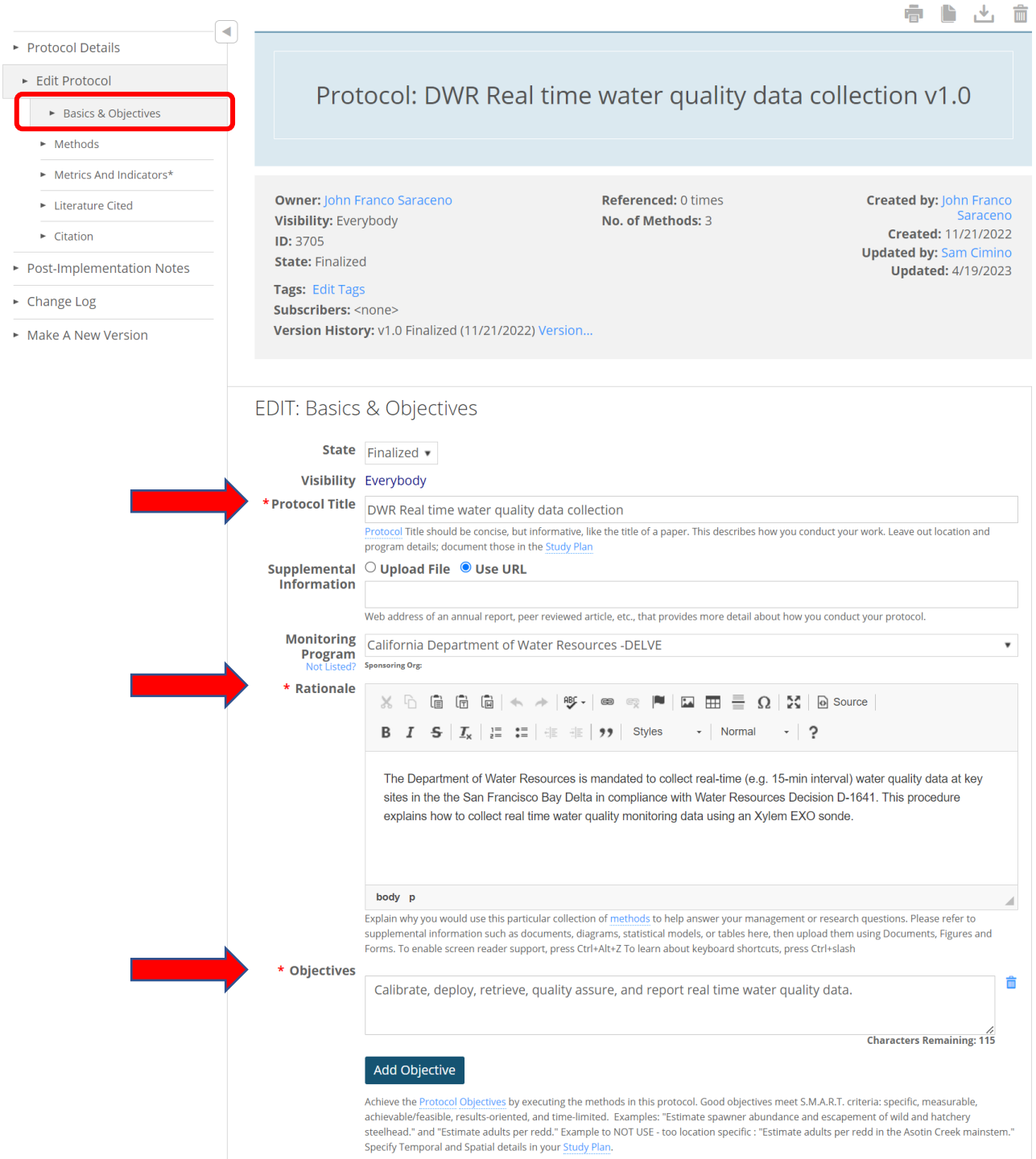
If you can't find a protocol to use "as is" or a protocol similar enough to clone and then adjust, you can create a new protocol by clicking the Create Protocol button in the upper right-hand corner of the List of Protocols.

You can find more details about **cloning a finalized protocol** later in the guidance document.

Edit Basics & Objectives

All fields marked with a red asterisk * are required.

- Protocol Title – should be concise but informative
- Rationale - background information explaining why you would use this particular collection of methods in your protocol to help answer management or research questions
- Objective(s) – achieved by executing the methods in this protocol

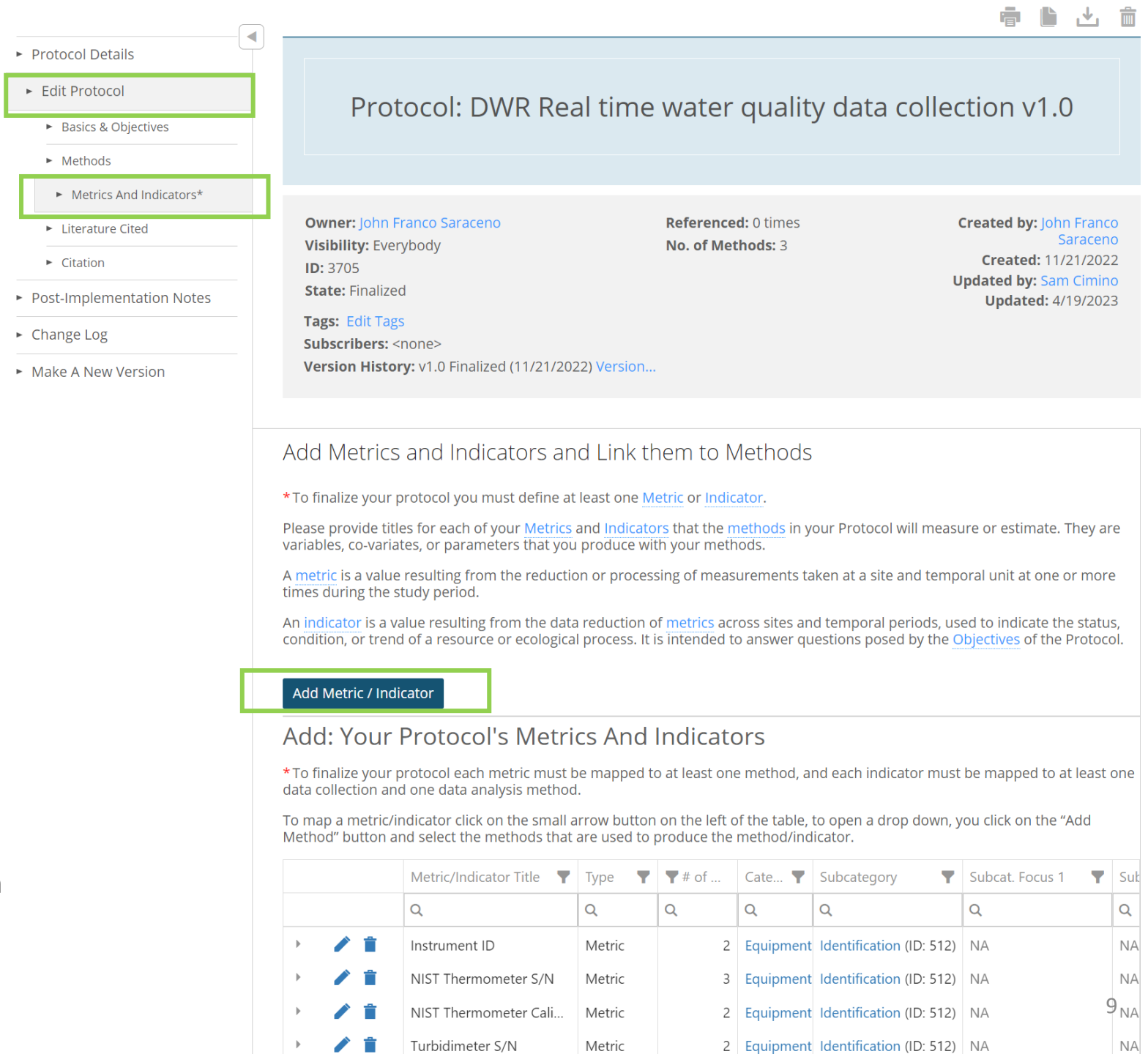


Add Metrics and Indicators to a Protocol

If you know what variables / parameters you'll be measuring in your protocol, it's helpful to document as many as you can think of prior to adding methods to your protocol.

By adding metrics and indicators first, when you're ready to add methods to your protocol, Monitoring Resources will suggest methods to you based on your metrics and indicators.

You must be the owner of the protocol to add metrics and indicators. After you open the protocol, click on the Edit Protocol tab in the left-hand menu and select Metrics And Indicators, then click on the Add Metrics / Indicators button.

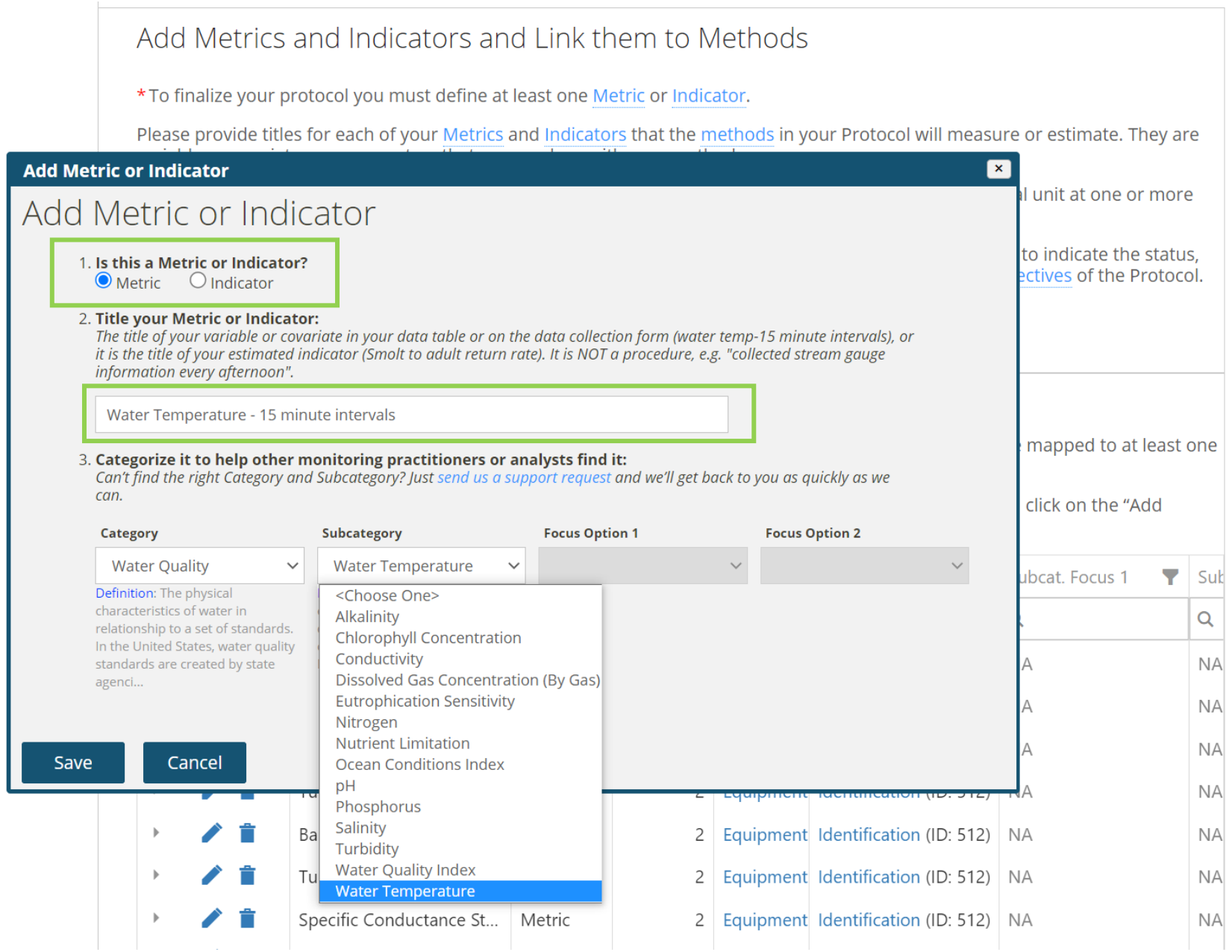


Add Metrics and Indicators to a Protocol

When adding a metric or indicator to your protocol, you'll need to provide a title. It helps to be consistent with the titles on your data collection forms.

Most importantly, you'll want to categorize your metric/indicator. Providing categories, subcategories, and foci will help Monitoring Resources suggest methods for you to add to your protocol.

Metric and indicator categories also help other monitoring practitioners or analysts find your metadata.

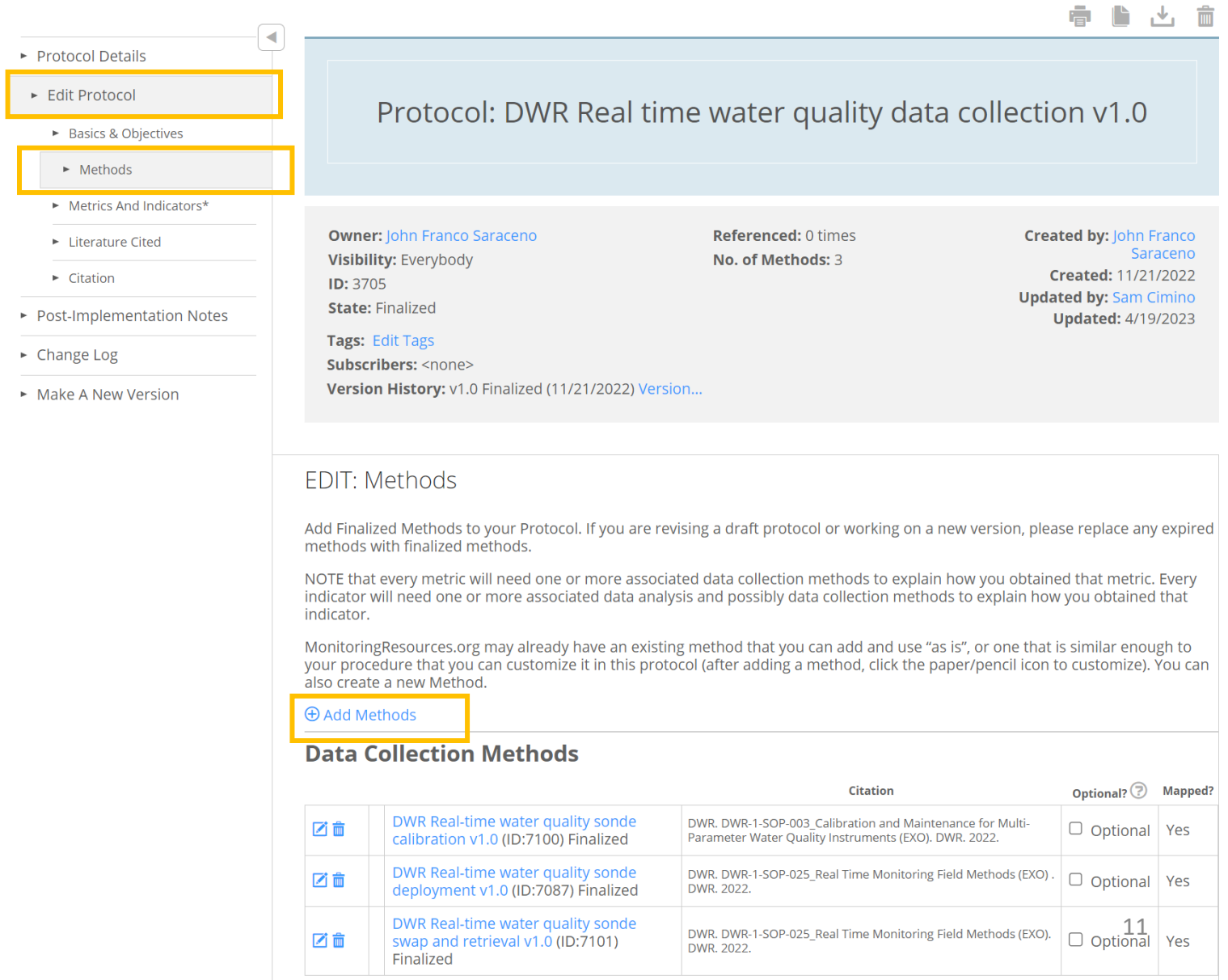


Add Methods to a Protocol

Before creating a new method to add to your protocol, search for previously created and finalized methods in MonitoringResources.org to use "as is" or to customize to fit your protocol.

You must be the owner of the protocol to add previously finalized methods to it.

After you open the protocol, click on the Edit Protocol tab in the left-hand menu and select Methods, then click on the Add Methods button.

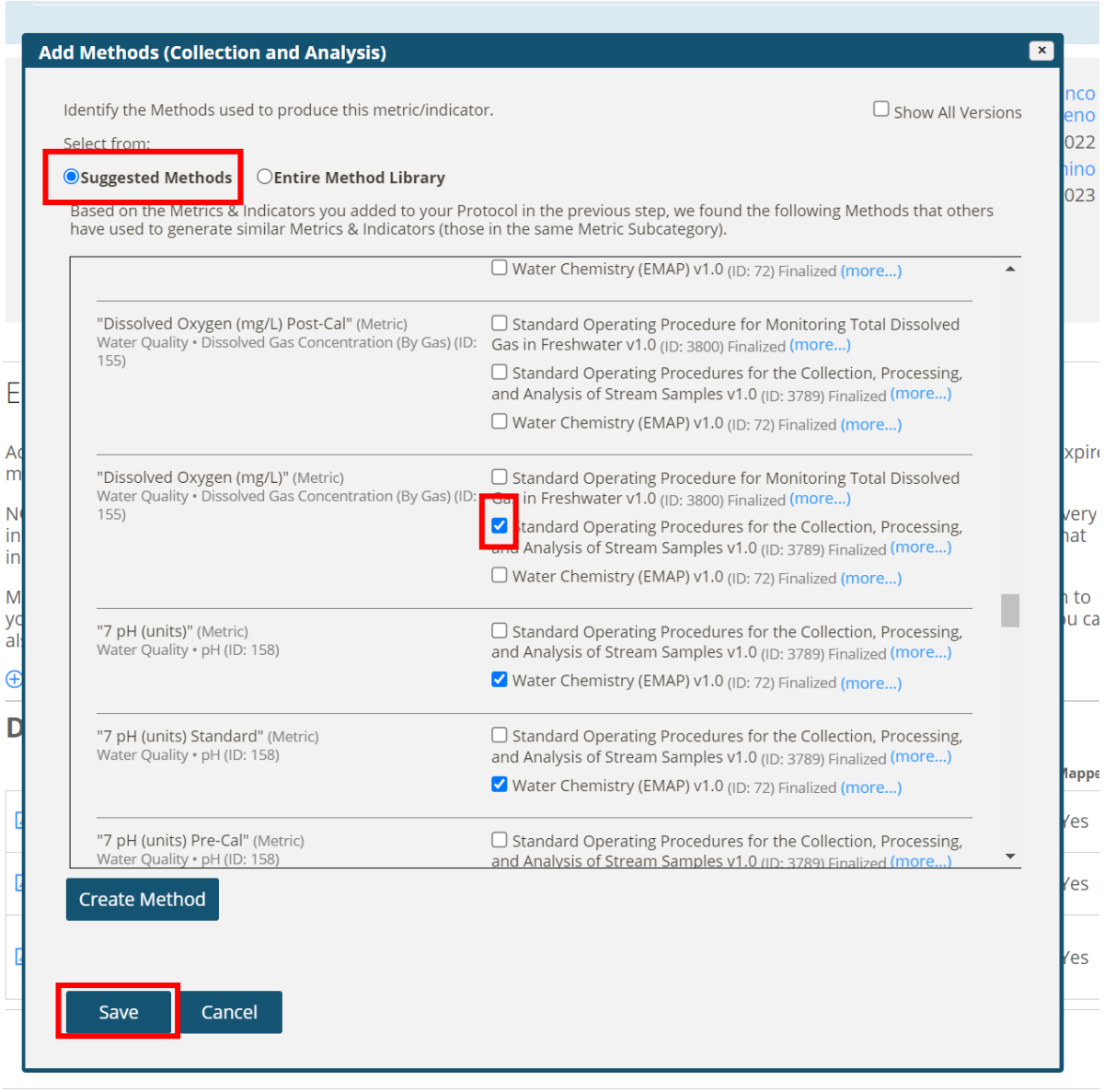


Add Suggested Methods to a Protocol

Once you've clicked on the Add Methods button, a pop-up window will display.

If you've previously added metrics and indicators to your protocol, the "Add Methods" pop-up will display a list of suggested methods to add to your protocol populated from other protocols with the same metrics and/or indicators. You can simply check the boxes of each method you want to add and click save.

An additional benefit of selecting methods based on the suggested method list is that you won't have to "map" those methods to your metrics later in the protocol documentation process.



Search Entire Method Library to Add Methods to a Protocol

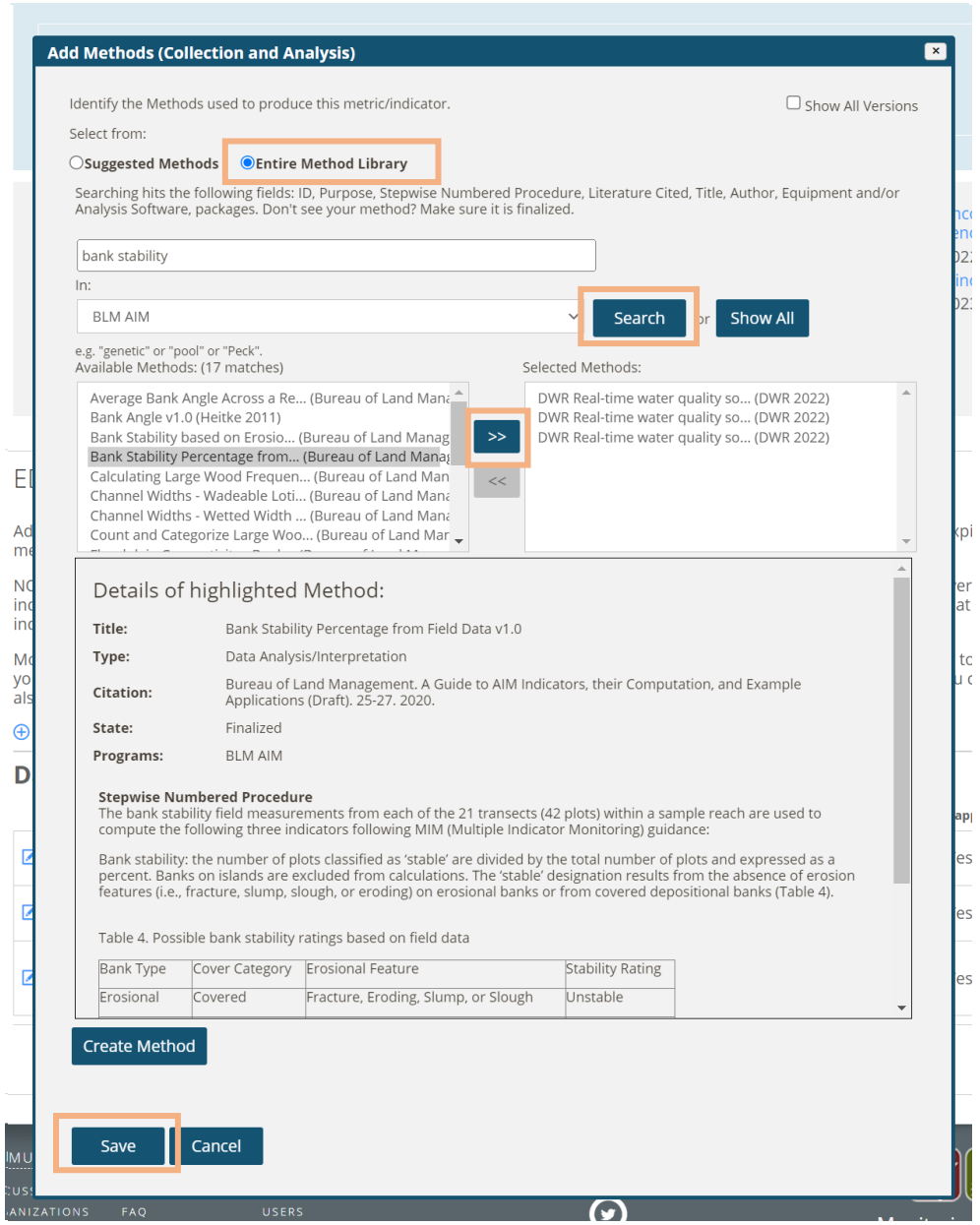
Once you've clicked on the Add Methods button, a pop-up window will display.

If you can't find a suggested method that fits your procedure or you haven't documented your metrics and indicators prior to this step and therefore your suggested methods list is blank, you can still add methods to your protocol by searching the entire method library.

When searching the entire method library, try to be specific with your keywords. If you know the ID number of the method you're searching for, use that.

You can also narrow your search by identifying the monitoring program of the method you're looking for.

When you find a method, highlight it and click on the arrows to move it into your protocol. Then click Save.



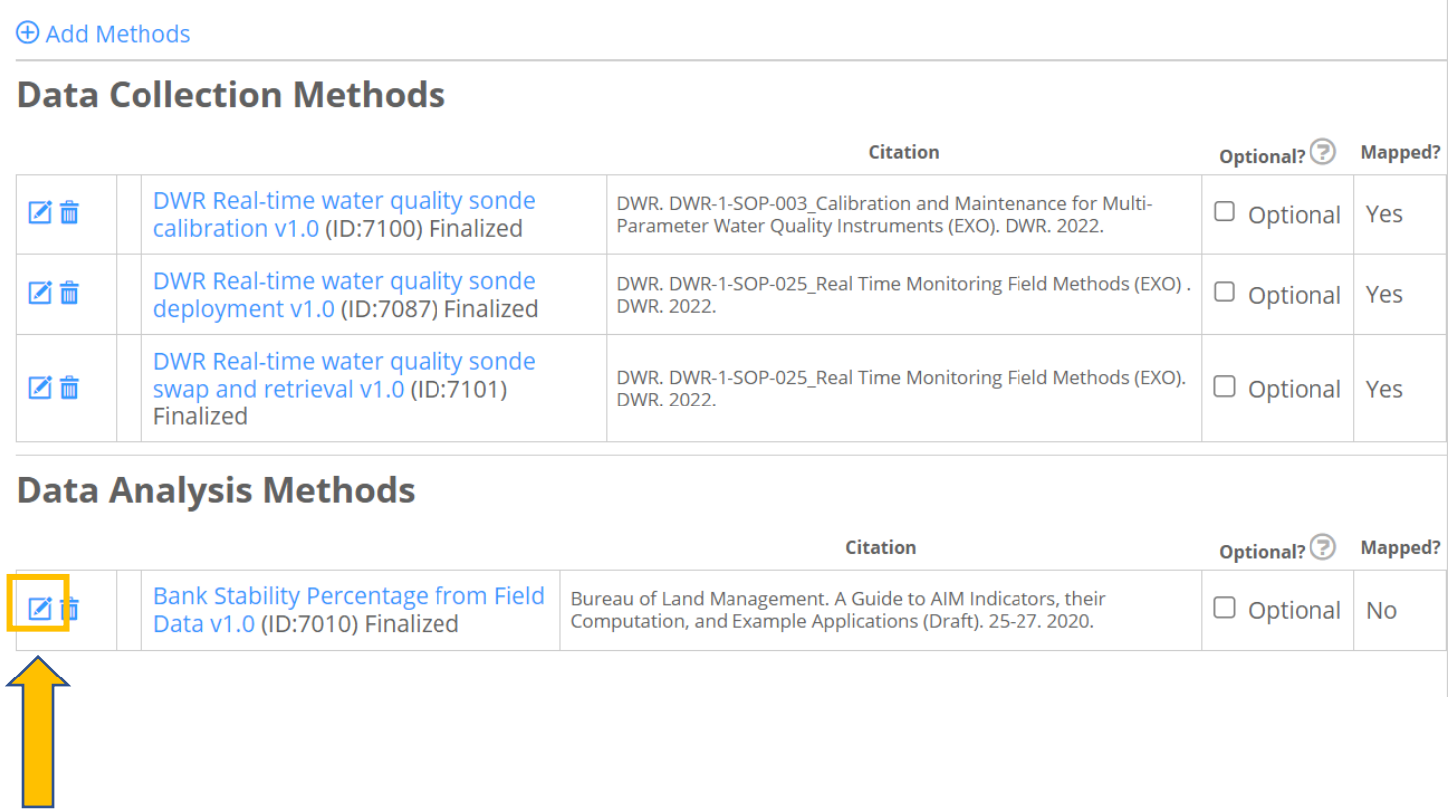
Customizing Methods In a Protocol

If you find a finalized method that is similar to your procedure but differs slightly in the numbered stepwise procedure, equipment, or analysis software, you can customize the finalized method to explain where it differs from your monitoring procedure.

To **customize** the added method, first add it to your protocol (previous slides), and then click on the pencil and paper icon to the left of the method (Figure).

A customizable version of the method will pop up allowing you to explain your customizations.

For more detail, see the short video explaining the customization procedure.



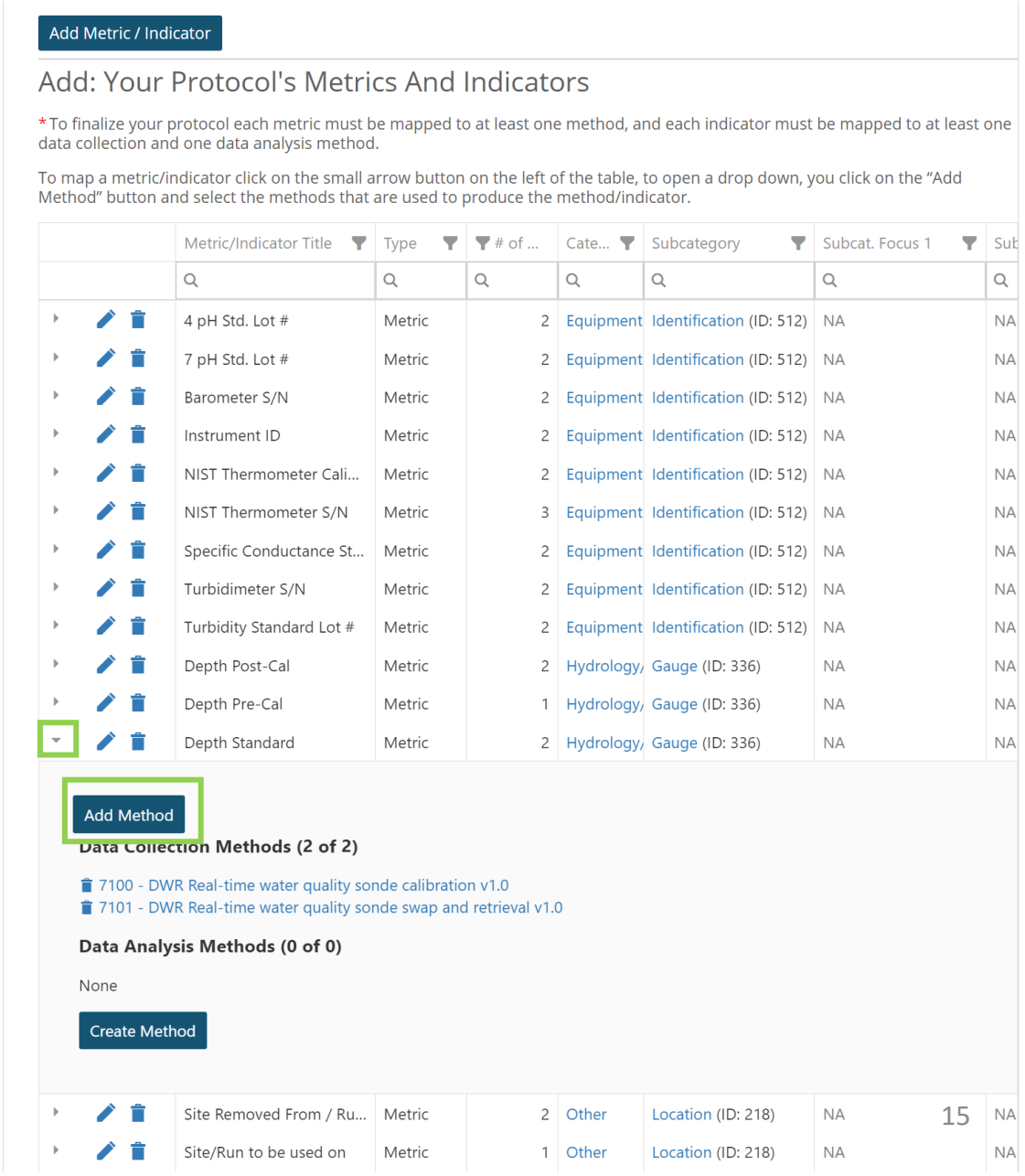
Mapping Methods to Metrics and Indicators in a Protocol

All methods must have an associated **metric** or **indicator** and all defined metrics and indicators must be linked to at least one method in your protocol for you to finalize. The requirement to map all metrics and indicators to methods is part of quality control to ensure that all metrics and indicators you defined have corresponding procedures to arrive at those metrics and indicators.

To map your methods to your metrics and indicators, click on the Edit Protocol tab in the left-hand menu and select Metrics And Indicators just like you would when adding metrics and indicators to your protocol. So if you haven't already, add your Metrics/Indicators to the table by clicking the "Add Metric/Indicator" button and fill in all the fields (see Page 9 for more details).

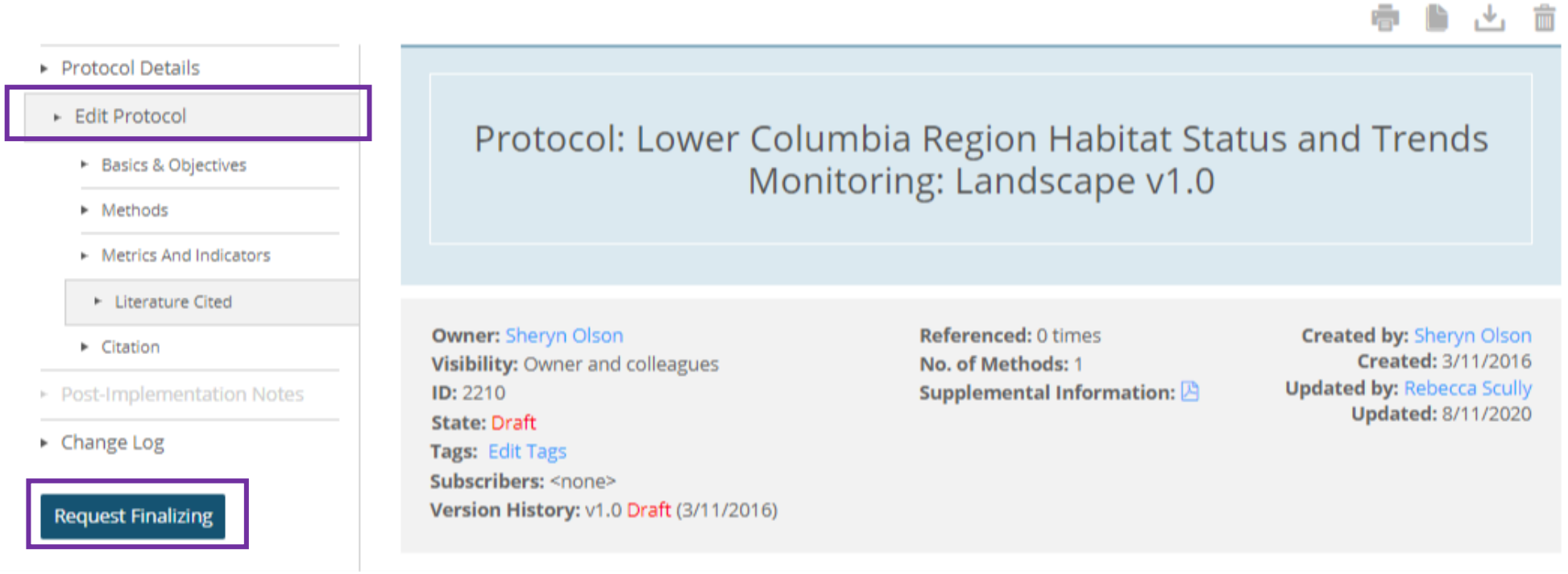
After adding metrics and indicators to your protocol, **map each one to appropriate methods**. If you added methods that were suggested to you in in the Add Methods portion of protocol documentation (see Page 11), those methods will already be mapped to at least one metric/indicator. To map new or additional methods to metrics/indicators, click on the small arrow button on the left of the table, to open a drop down, click on the "Add Method" button, and select the methods that are used to produce the method/indicator (figure).

All methods and metrics must be mapped for you to finalize your protocol. You may map more than one method to an indicator or metric. Commonly, an indicator will have both a data collection and a data analysis method mapped.



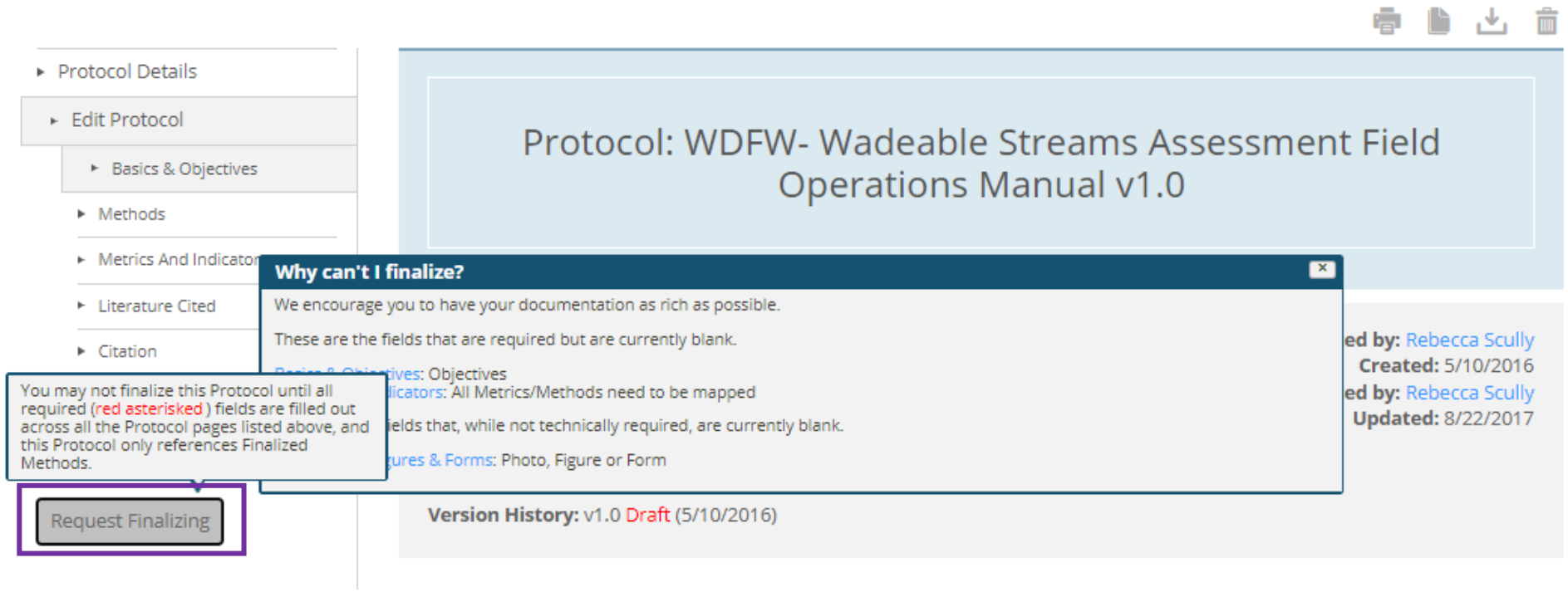
Request Finalizing of a Protocol

Sign into MonitoringResources.org, go to your protocol, click the Edit Protocol tab, and after you have completed all required fields, click the Request Finalizing button on the bottom left of the screen.



Request Finalizing of a Protocol

If the Request Finalizing button is grayed out, you can hover-over the button to see a general explanation as to why your protocol cannot be finalized and, for more detail, you can click on the grayed out "Request Finalizing" button for a list of required fields you are missing.



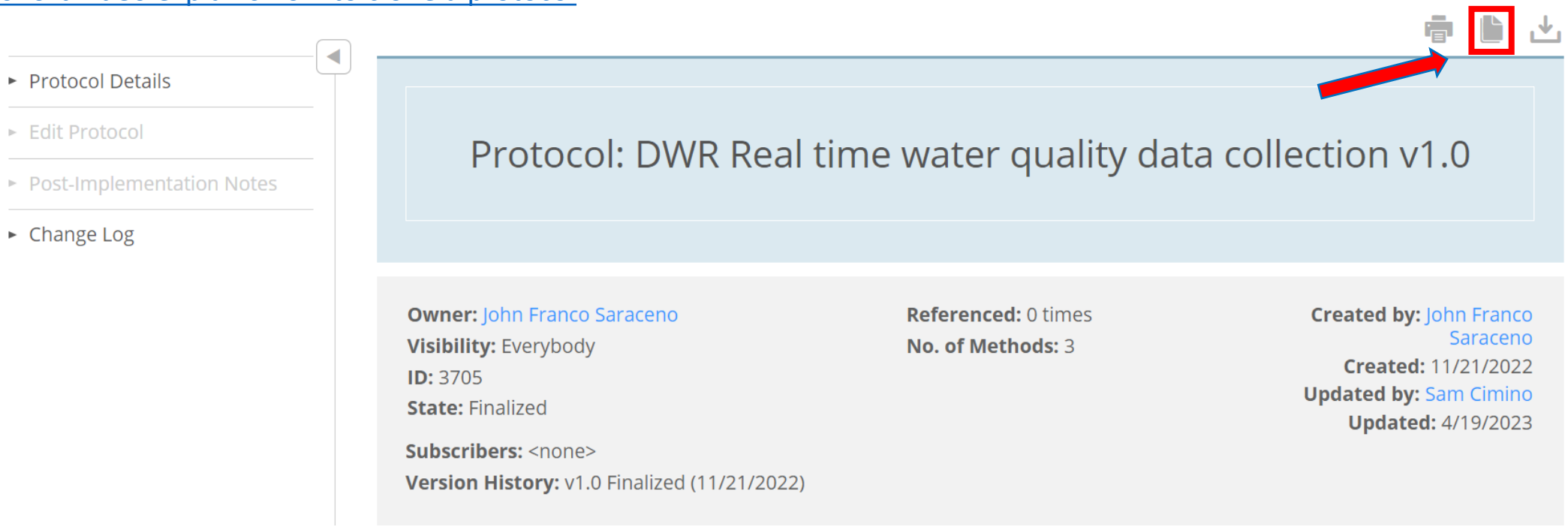
Clone a Template Protocol

If you find a Protocol that depicts a similar monitoring investigation to what your agency conducts, consider **cloning this existing protocol** rather than creating a new protocol from scratch.

Only *finalized* protocols may be cloned. Several template protocols have been created and finalized by subject matter experts for cloning purposes. Search for protocols in the List of Protocols using keywords or a combination of search options. If you need help searching for protocols, check out this video. When you find a protocol that is similar to your monitoring investigation, open that protocol, then choose the clone button (the sheet of paper with a folded corner icon) at the top of the Protocol Details page (Figure).

After you clone a protocol, check and edit every section (**see pages 7-14**) within the cloned protocol to ensure it meets your documentation needs. Once you have edited the protocol to accurately describe your monitoring, request finaliziation.

This short video explains how to clone a protocol.



Update Your Protocol by Versioning It

Create a new **version** of a **Protocol** when you want to add or delete Methods, Metrics, or Indicators.

There are two ways to version a Protocol. You may: 1) use the Make A New Version tab in the left menu 2) use the "Version..." hyperlink next to Version History in the Protocol Details.

Changes are tracked in the Change Log, though it is helpful for future reference to add a sentence to the background in the new version to explain the purpose for amending. Protocols are automatically assigned a new version number.

Only owners or colleagues can create new versions and ***a new version can only be created from a finalized protocol.***