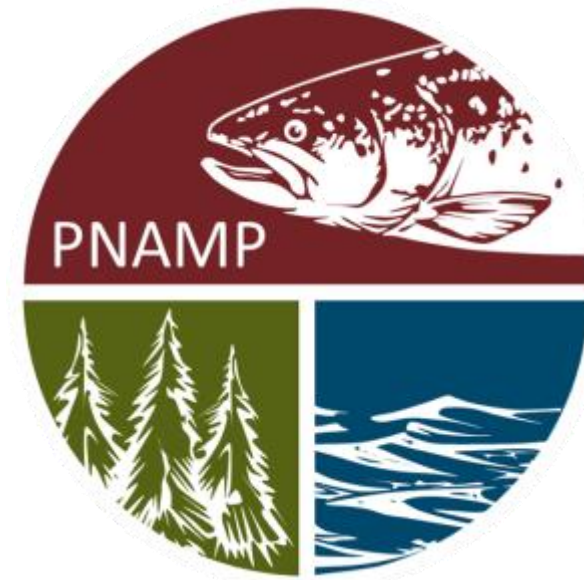


# Protocol Documentation & Cloning for DELVE Subject Matter Experts



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# General MonitoringResources.org Tips

Login to Edit!

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

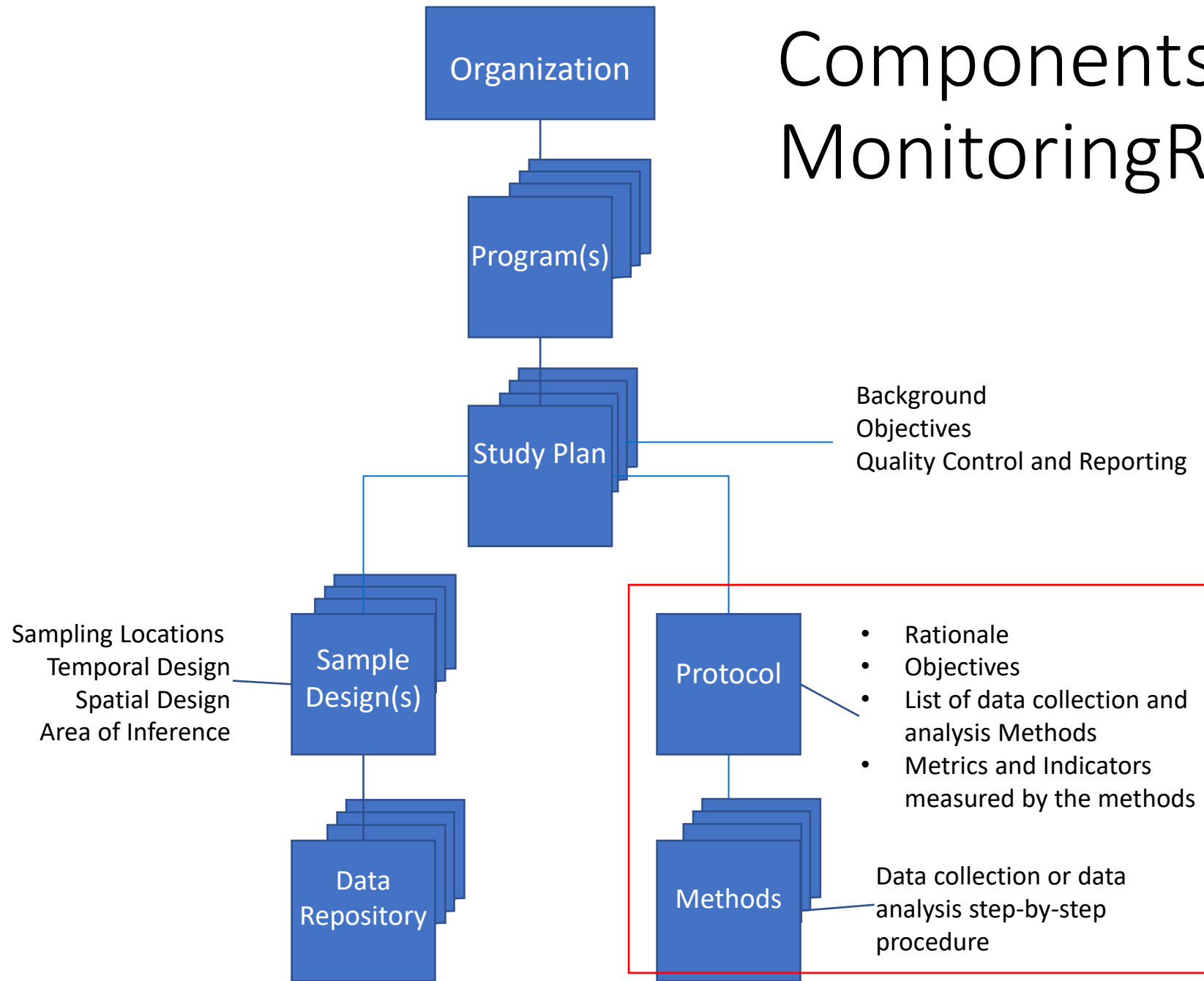
Only owners and colleagues can edit or make new versions.

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

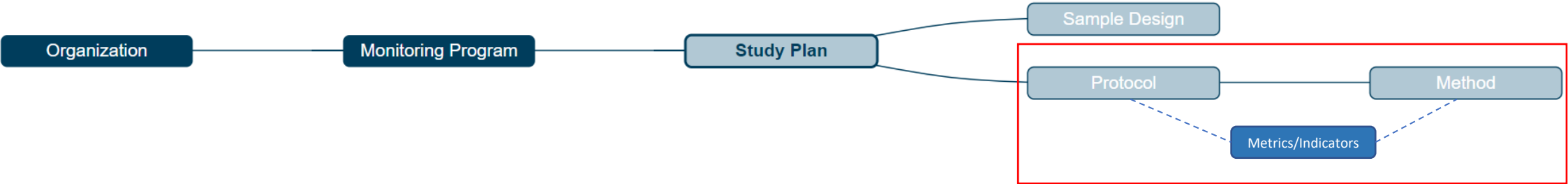


DELVE subject matter experts are responsible for documenting their protocol and method metadata in MonitoringResources.org.

# DELVE and Monitoring Resources Vocabulary Crosswalk

<u>DELVE</u>		<u>Monitoring Resources</u>
Project	↔	Monitoring Program
Data Set	↔	Protocol
"Fields" of Data Collected	↔	Metrics/Indicators
File within a Data Set	↔	Method

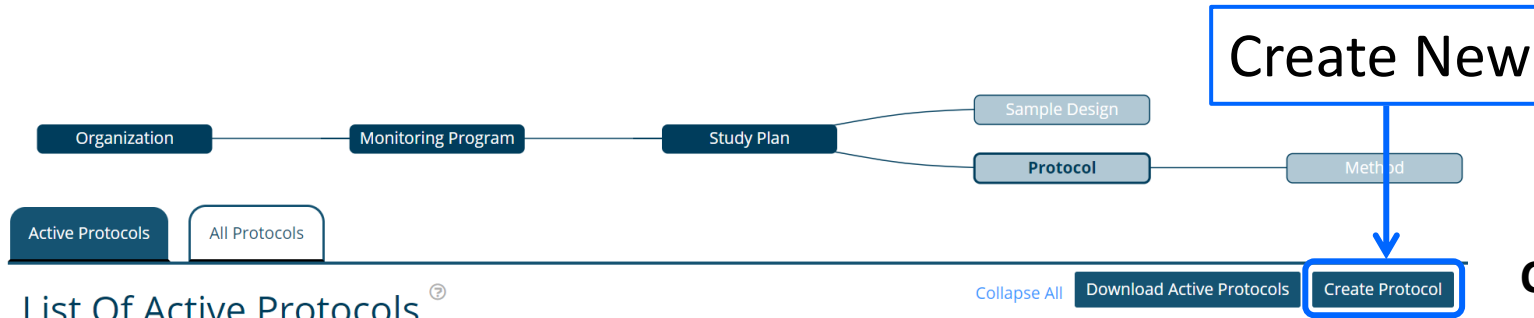
Road map of MonitoringResources.org components:



# 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.

## List Of Active Protocols <sup>Ⓜ</sup>

This grid only displays Protocols considered to be "Active", so any Finalized Protocols and non-Finalized Protocols where the create/last modified date is less than 12 months old.

Viewing 378 of 378 active protocols.

ID	Protocol Name	State	Program	Year	Owner	Com...	M...	Last Mod...
3704	Evaluate gears for sampling juvenile Burbot v1.0	Draft	Colville Confederated Tribe		Jason McLellan	72%	7	12/2/2022
3705	DWR Real time water quality data collection v1.0	Finalized		2023	John Franco Sarace	60%	3	4/19/2023

### DWR Real time water quality data collection v1.0

#### Methods (3 of 3)

- [32512 - Modified DWR Real-time water quality sonde calibration v1.0](#)
- [32513 - Modified DWR Real-time water quality sonde deployment v1.0](#)
- [32514 - Modified DWR Real-time water quality sonde swap and retrieval v1.0](#)

#### Metrics (5 of 68)

- 25749 - Instrument ID
  - 25750 - NIST Thermometer S/N
  - 25751 - NIST Thermometer Calibration Due Date
  - 25752 - Turbidimeter S/N
  - 25753 - Turbidimeter Calibration Due Date
- [More](#)

#### Rationale

The Department of Water Resources is mandated to collect real-time (e.g. 15-min interval) water quality data at key sites in the the San Francisco Bay Delta in compliance with Water Resources Decision D-1641. This procedure explains how to collect real time water quality monitoring data using an Xylem EXO sonde.

#### Objectives

- Calibrate, deploy, retrieve, quality assure, and report real time water quality data.

#### Citation

[John Franco Saraceno. 2023. DWR Real time water quality data collection v1.0. MonitoringResources.org](#)

3706	Upper Spokane River Redband Trout Assessment (1997-004-0	Finalized	Washington Department of	2022	Nicholas Albrecht	100%	17	12/28/2022
3709	Monitoring the relative abundance and distribution of larval a	Finalized	NPT RME	2023	Tod Sween	100%	4	1/31/2023
3710	Monitor and Evaluate the Genetic Diversity of Supplemented C	Draft	CRITFC RM&E Program	2023	Hayley Nuetzel	81%	8	1/21/2023
3711	Westslope Cutthroat Trout Assessment - Resident Tributary Po	Finalized	Kalispel Tribe fisheries Prog	2023	Nick Bean	70%	8	2/14/2023
3712	Visual Stock Identification for Harvested Salmon v1.0	Draft	ODFW SAFE (Select Area Fi		Cyndi Baker	72%	1	1/25/2023
3713	Evaluation of IGF1 as a Tool for Assessing Growth in Juvenile S	Draft	CRITFC Habitat Status and		Anna Ringelman	54%	4	3/14/2023

# 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

Protocol: DWR Real time water quality data collection v1.0

Owner: [John Franco Saraceno](#) Referenced: 0 times Created by: [John Franco Saraceno](#)  
Visibility: Everybody No. of Methods: 3 Created: 11/21/2022  
ID: 3705 State: Finalized Updated by: [Sam Cimino](#)  
Tags: [Edit Tags](#) Updated: 4/19/2023  
Subscribers: <none>  
Version History: v1.0 Finalized (11/21/2022) [Version...](#)

EDIT: Basics & Objectives

State: Finalized

Visibility: Everybody

\* Protocol Title: DWR Real time water quality data collection  
Protocol Title should be concise, but informative, like the title of a paper. This describes how you conduct your work. Leave out location and program details; document those in the [Study Plan](#)

Supplemental Information:  Upload File  Use URL  
Web address of an annual report, peer reviewed article, etc., that provides more detail about how you conduct your protocol.

Monitoring Program: California Department of Water Resources -DELVE  
Sponsoring Org: Not Listed?

\* Rationale: 

The Department of Water Resources is mandated to collect real-time (e.g. 15-min interval) water quality data at key sites in the the San Francisco Bay Delta in compliance with Water Resources Decision D-1641. This procedure explains how to collect real time water quality monitoring data using an Xylem EXO sonde.

\* Objectives: Calibrate, deploy, retrieve, quality assure, and report real time water quality data.  
Characters Remaining: 115

[Add Objective](#)

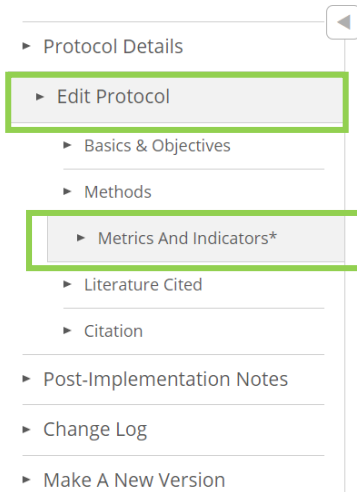
Achieve the [Protocol Objectives](#) by executing the methods in this protocol. Good objectives meet S.M.A.R.T. criteria: specific, measurable, achievable/feasible, results-oriented, and time-limited. Examples: "Estimate spawner abundance and escapement of wild and hatchery steelhead." and "Estimate adults per redd." Example to NOT USE - too location specific : "Estimate adults per redd in the Asotin Creek mainstem." Specify Temporal and Spatial details in your [Study Plan](#).

# 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.



## Protocol: DWR Real time water quality data collection v1.0

**Owner:** [John Franco Saraceno](#)      **Referenced:** 0 times      **Created by:** [John Franco Saraceno](#)  
**Visibility:** Everybody      **No. of Methods:** 3      **Created:** 11/21/2022  
**ID:** 3705      **State:** Finalized      **Updated by:** [Sam Cimino](#)  
**Tags:** [Edit Tags](#)      **Updated:** 4/19/2023  
**Subscribers:** <none>  
**Version History:** v1.0 Finalized (11/21/2022) [Version...](#)

## Add Metrics and Indicators and Link them to Methods

\* To finalize your protocol you must define at least one [Metric](#) or [Indicator](#).

Please provide titles for each of your [Metrics](#) and [Indicators](#) that the [methods](#) in your Protocol will measure or estimate. They are variables, co-variates, or parameters that you produce with your methods.

A [metric](#) is a value resulting from the reduction or processing of measurements taken at a site and temporal unit at one or more times during the study period.









An [indicator](#) is a value resulting from the data reduction of [metrics](#) across sites and temporal periods, used to indicate the status, condition, or trend of a resource or ecological process. It is intended to answer questions posed by the [Objectives](#) of the Protocol.

[Add Metric / Indicator](#)

## Add: Your Protocol's Metrics And Indicators

\* To finalize your protocol each metric must be mapped to at least one method, and each indicator must be mapped to at least one data collection and one data analysis method.

To map a metric/indicator click on the small arrow button on the left of the table, to open a drop down, you click on the "Add Method" button and select the methods that are used to produce the method/indicator.

	Metric/Indicator Title	Type	# of ...	Cate...	Subcategory	Subcat. Focus 1	Subt
	Q	Q	Q	Q	Q	Q	Q
▶  	Instrument ID	Metric	2	<a href="#">Equipment</a>	<a href="#">Identification</a> (ID: 512)	NA	NA
▶  	NIST Thermometer S/N	Metric	3	<a href="#">Equipment</a>	<a href="#">Identification</a> (ID: 512)	NA	NA
▶  	NIST Thermometer Cali...	Metric	2	<a href="#">Equipment</a>	<a href="#">Identification</a> (ID: 512)	NA	9 NA
▶  	Turbidimeter S/N	Metric	2	<a href="#">Equipment</a>	<a href="#">Identification</a> (ID: 512)	NA	NA



# 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](https://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.

Protocol: DWR Real time water quality data collection v1.0

**Owner:** [John Franco Saraceno](#) **Referenced:** 0 times **Created by:** [John Franco Saraceno](#)  
**Visibility:** Everybody **No. of Methods:** 3 **Created:** 11/21/2022  
**ID:** 3705 **State:** Finalized **Updated by:** [Sam Cimino](#)  
**Tags:** [Edit Tags](#) **Updated:** 4/19/2023  
**Subscribers:** <none>  
**Version History:** v1.0 Finalized (11/21/2022) [Version...](#)

EDIT: Methods

Add Finalized Methods to your Protocol. If you are revising a draft protocol or working on a new version, please replace any expired methods with finalized methods.

NOTE that every metric will need one or more associated data collection methods to explain how you obtained that metric. Every indicator will need one or more associated data analysis and possibly data collection methods to explain how you obtained that indicator.

MonitoringResources.org may already have an existing method that you can add and use "as is", or one that is similar enough to your procedure that you can customize it in this protocol (after adding a method, click the paper/pencil icon to customize). You can also create a new Method.

[+ Add Methods](#)

### Data Collection Methods

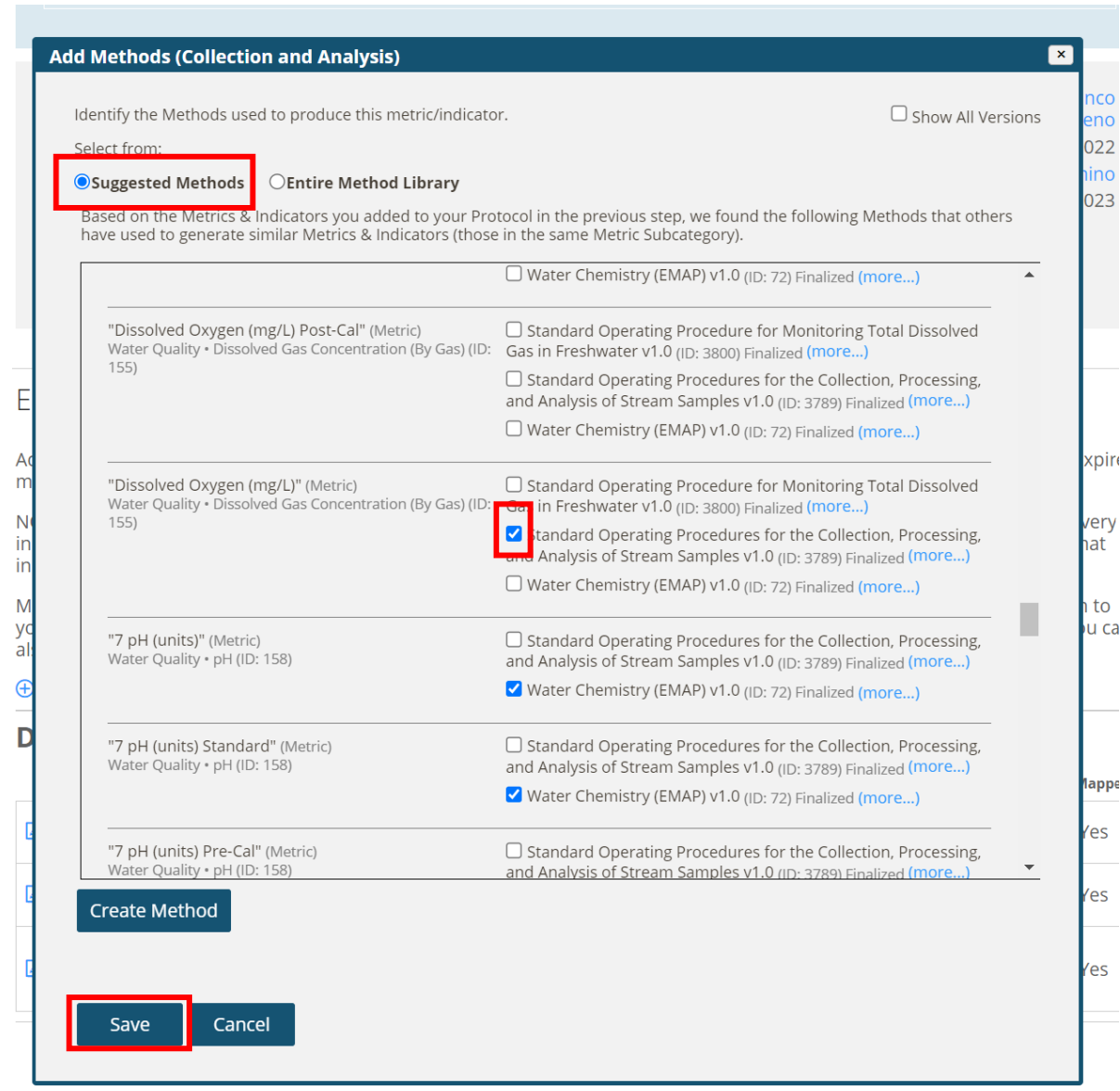
		Citation	Optional? <sup>?</sup>	Mapped?
	<a href="#">DWR Real-time water quality sonde calibration v1.0 (ID:7100) Finalized</a>	DWR. DWR-1-SOP-003. Calibration and Maintenance for Multi-Parameter Water Quality Instruments (EXO). DWR. 2022.	<input type="checkbox"/> Optional	Yes
	<a href="#">DWR Real-time water quality sonde deployment v1.0 (ID:7087) Finalized</a>	DWR. DWR-1-SOP-025_Real Time Monitoring Field Methods (EXO). DWR. 2022.	<input type="checkbox"/> Optional	Yes
	<a href="#">DWR Real-time water quality sonde swap and retrieval v1.0 (ID:7101) Finalized</a>	DWR. DWR-1-SOP-025_Real Time Monitoring Field Methods (EXO). DWR. 2022.	<input type="checkbox"/> Optional <b>11</b>	Yes

# 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.

The screenshot shows a software window titled "Add Methods (Collection and Analysis)". It contains a search interface with the following elements:

- Header: "Add Methods (Collection and Analysis)" with a close button.
- Text: "Identify the Methods used to produce this metric/indicator." and a "Show All Versions" checkbox.
- Radio buttons: "Suggested Methods" and "Entire Method Library" (selected).
- Text: "Searching hits the following fields: ID, Purpose, Stepwise Numbered Procedure, Literature Cited, Title, Author, Equipment and/or Analysis Software, packages. Don't see your method? Make sure it is finalized."
- Search input: "bank stability".
- Dropdown: "In: BLM AIM".
- Buttons: "Search" and "Show All".
- Text: "e.g. 'genetic' or 'pool' or 'Peck'".
- Text: "Available Methods: (17 matches)".
- Method list: A scrollable list of methods. One method, "Bank Stability Percentage from Field Data v1.0", is highlighted. A blue button with ">>" is next to it.
- Text: "Selected Methods:". Below it, three instances of "DWR Real-time water quality so... (DWR 2022)" are listed.
- Section: "Details of highlighted Method:".
  - Title:** Bank Stability Percentage from Field Data v1.0
  - Type:** Data Analysis/Interpretation
  - Citation:** Bureau of Land Management. A Guide to AIM Indicators, their Computation, and Example Applications (Draft). 25-27. 2020.
  - State:** Finalized
  - Programs:** BLM AIM
- Stepwise Numbered Procedure:**

The bank stability field measurements from each of the 21 transects (42 plots) within a sample reach are used to compute the following three indicators following MIM (Multiple Indicator Monitoring) guidance:

Bank stability: the number of plots classified as 'stable' are divided by the total number of plots and expressed as a percent. Banks on islands are excluded from calculations. The 'stable' designation results from the absence of erosion features (i.e., fracture, slump, slough, or eroding) on erosional banks or from covered depositional banks (Table 4).
- Text: "Table 4. Possible bank stability ratings based on field data".
- Table:

Bank Type	Cover Category	Erosional Feature	Stability Rating
Erosional	Covered	Fracture, Eroding, Slump, or Slough	Unstable
- Buttons: "Create Method", "Save", and "Cancel".

# 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](#).

[+ Add Methods](#)

## Data Collection Methods

		Citation	Optional?	Mapped?
	<a href="#">DWR Real-time water quality sonde calibration v1.0 (ID:7100)</a> Finalized	DWR. DWR-1-SOP-003_Calibration and Maintenance for Multi-Parameter Water Quality Instruments (EXO). DWR. 2022.	<input type="checkbox"/> Optional	Yes
	<a href="#">DWR Real-time water quality sonde deployment v1.0 (ID:7087)</a> Finalized	DWR. DWR-1-SOP-025_Real Time Monitoring Field Methods (EXO). DWR. 2022.	<input type="checkbox"/> Optional	Yes
	<a href="#">DWR Real-time water quality sonde swap and retrieval v1.0 (ID:7101)</a> Finalized	DWR. DWR-1-SOP-025_Real Time Monitoring Field Methods (EXO). DWR. 2022.	<input type="checkbox"/> Optional	Yes

## Data Analysis Methods

		Citation	Optional?	Mapped?
	<a href="#">Bank Stability Percentage from Field Data v1.0 (ID:7010)</a> Finalized	Bureau of Land Management. A Guide to AIM Indicators, their Computation, and Example Applications (Draft). 25-27. 2020.	<input type="checkbox"/> Optional	No



# 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 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.

Add Metric / Indicator

### Add: Your Protocol's Metrics And Indicators

\*To finalize your protocol each metric must be mapped to at least one method, and each indicator must be mapped to at least one data collection and one data analysis method.

To map a metric/indicator click on the small arrow button on the left of the table, to open a drop down, you click on the "Add Method" button and select the methods that are used to produce the method/indicator.

	Metric/Indicator Title	Type	# of ...	Cate...	Subcategory	Subcat. Focus 1	Sub
	Q	Q	Q	Q	Q	Q	Q
▶	4 pH Std. Lot #	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	7 pH Std. Lot #	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	Barometer S/N	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	Instrument ID	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	NIST Thermometer Cali...	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	NIST Thermometer S/N	Metric	3	Equipment	Identification (ID: 512)	NA	NA
▶	Specific Conductance St...	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	Turbidimeter S/N	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	Turbidity Standard Lot #	Metric	2	Equipment	Identification (ID: 512)	NA	NA
▶	Depth Post-Cal	Metric	2	Hydrology,	Gauge (ID: 336)	NA	NA
▶	Depth Pre-Cal	Metric	1	Hydrology,	Gauge (ID: 336)	NA	NA
▼	Depth Standard	Metric	2	Hydrology,	Gauge (ID: 336)	NA	NA

Add Method

Data Collection Methods (2 of 2)

- 7100 - DWR Real-time water quality sonde calibration v1.0
- 7101 - DWR Real-time water quality sonde swap and retrieval v1.0

Data Analysis Methods (0 of 0)

None

Create Method

▶	Site Removed From / Ru...	Metric	2	Other	Location (ID: 218)	NA	15	NA
▶	Site/Run to be used on	Metric	1	Other	Location (ID: 218)	NA		NA

# 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.

The screenshot displays the user interface for editing a protocol. On the left, a navigation menu is visible with the following items: Protocol Details, Edit Protocol (highlighted with a purple box), Basics & Objectives, Methods, Metrics And Indicators, Literature Cited, Citation, Post-Implementation Notes, and Change Log. At the bottom of the menu, a 'Request Finalizing' button is highlighted with a purple box. The main content area features a light blue header with the title 'Protocol: Lower Columbia Region Habitat Status and Trends Monitoring: Landscape v1.0'. Below the header, a grey box contains protocol details: Owner: Sheryn Olson, Visibility: Owner and colleagues, ID: 2210, State: Draft, Tags: Edit Tags, and Subscribers: <none>. Additional information includes Version History: v1.0 Draft (3/11/2016), Referenced: 0 times, No. of Methods: 1, Supplemental Information: [document icon], Created by: Sheryn Olson, Created: 3/11/2016, and Updated by: Rebecca Scully, Updated: 8/11/2020. In the top right corner, there are icons for printing, saving, downloading, and deleting.

# 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.

The screenshot displays a web interface for managing a protocol. On the left, a sidebar menu includes 'Protocol Details', 'Edit Protocol', 'Basics & Objectives', 'Methods', 'Metrics And Indicator', 'Literature Cited', and 'Citation'. The main content area features a large light blue header with the text 'Protocol: WDFW- Wadeable Streams Assessment Field Operations Manual v1.0'. Below this, a gray box contains the text 'Created by: Rebecca Scully', 'Created: 5/10/2016', 'Updated by: Rebecca Scully', and 'Updated: 8/22/2017'. At the bottom, a 'Version History: v1.0 Draft (5/10/2016)' is shown. A 'Request Finalizing' button is highlighted with a purple border. A tooltip titled 'Why can't I finalize?' is open over the button, containing the following text: 'We encourage you to have your documentation as rich as possible. These are the fields that are required but are currently blank. Basics & Objectives: Objectives Indicators: All Metrics/Methods need to be mapped Fields that, while not technically required, are currently blank. Figures & Forms: Photo, Figure or Form'. A smaller tooltip on the left side of the sidebar explains: 'You may not finalize this Protocol until all required (red asterisked) fields are filled out across all the Protocol pages listed above, and this Protocol only references Finalized Methods.'

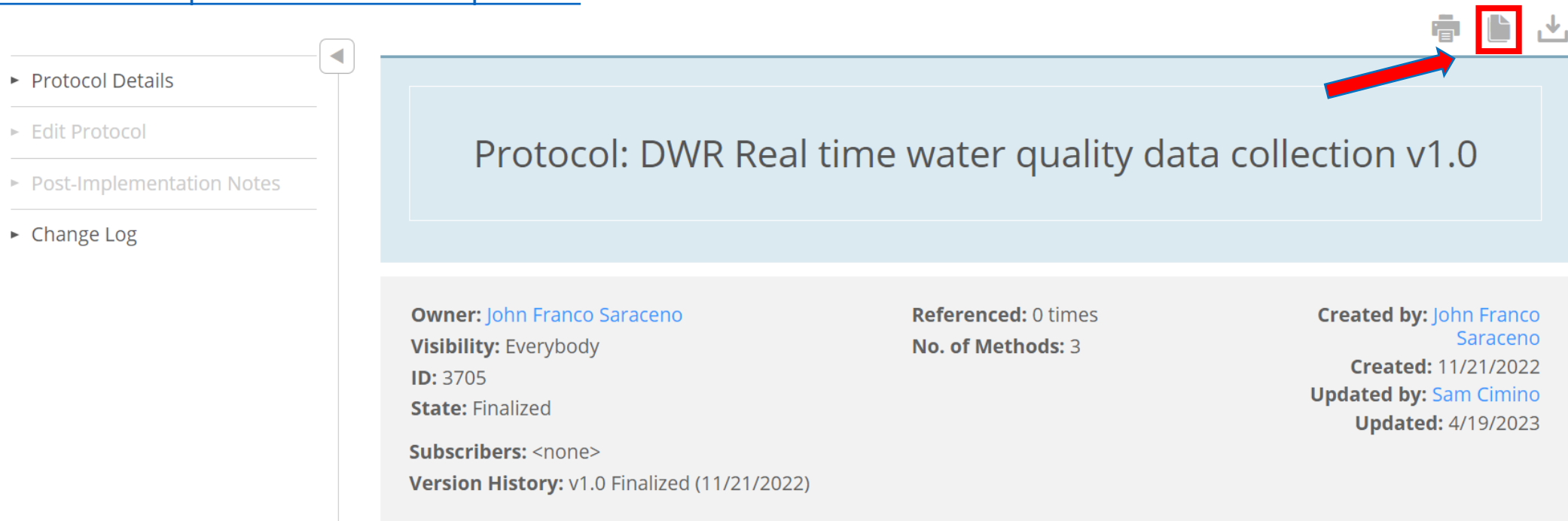
# Clone a Template Protocol

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 finalization.

[This short video explains how to clone a protocol.](#)



The screenshot displays a protocol details page for "Protocol: DWR Real time water quality data collection v1.0". On the left, a navigation menu includes "Protocol Details", "Edit Protocol", "Post-Implementation Notes", and "Change Log". At the top right, there are icons for printing, cloning (highlighted with a red box and arrow), and downloading. The main content area shows the protocol title. Below this, a metadata section provides the following information:

<b>Owner:</b> John Franco Saraceno	<b>Referenced:</b> 0 times	<b>Created by:</b> John Franco Saraceno
<b>Visibility:</b> Everybody	<b>No. of Methods:</b> 3	<b>Created:</b> 11/21/2022
<b>ID:</b> 3705		<b>Updated by:</b> Sam Cimino
<b>State:</b> Finalized		<b>Updated:</b> 4/19/2023
<b>Subscribers:</b> <none>		
<b>Version History:</b> v1.0 Finalized (11/21/2022)		

# 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.***

The screenshot displays a web interface for managing a protocol. On the left, a vertical menu contains several options: 'Protocol Details', 'Edit Protocol', 'Post-Implementation Notes', 'Change Log', and 'Make A New Version'. The 'Make A New Version' option is highlighted with a green rectangular box. The main content area shows the protocol title 'Protocol: DWR Real time water quality data collection v1.0' in a light blue header. Below this, a grey box contains protocol details: Owner: John Franco Saraceno, Visibility: Everybody, ID: 3705, State: Finalized, Tags: Edit Tags, and Subscribers: <none>. On the right side of this box, it shows 'Referenced: 0 times', 'No. of Methods: 3', 'Created by: John Franco Saraceno', 'Created: 11/21/2022', 'Updated by: Sam Cimino', and 'Updated: 5/19/2023'. At the bottom of the details box, the 'Version History' section shows 'v1.0 Finalized (11/21/2022)' with a 'Version...' link highlighted by a green box. At the top right of the main content area, there are icons for print, document, download, and delete.