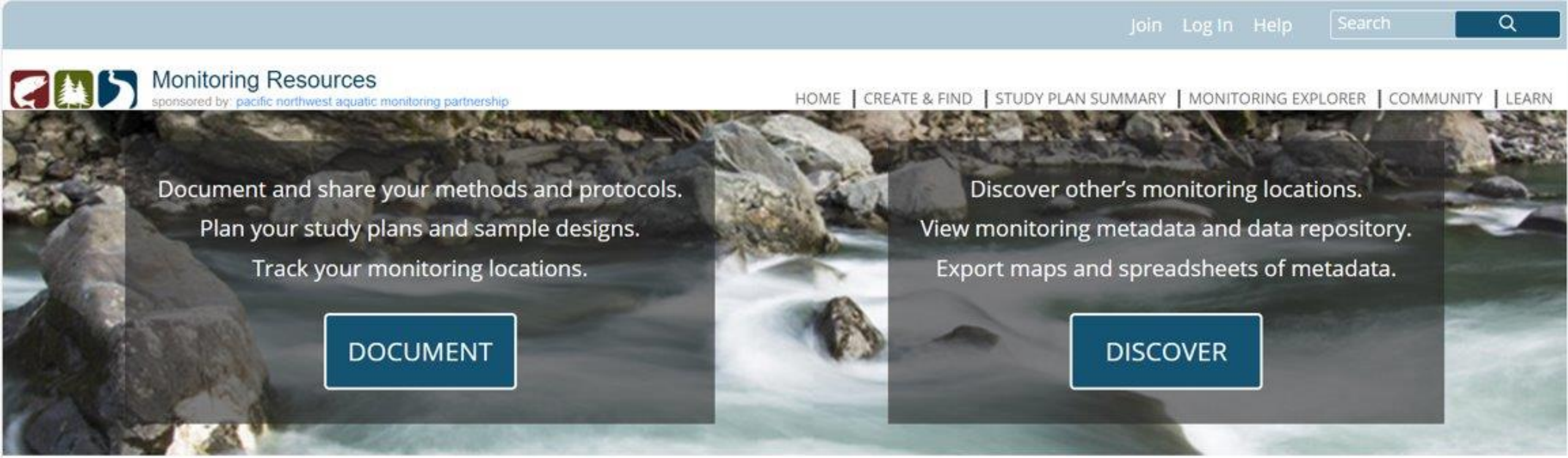


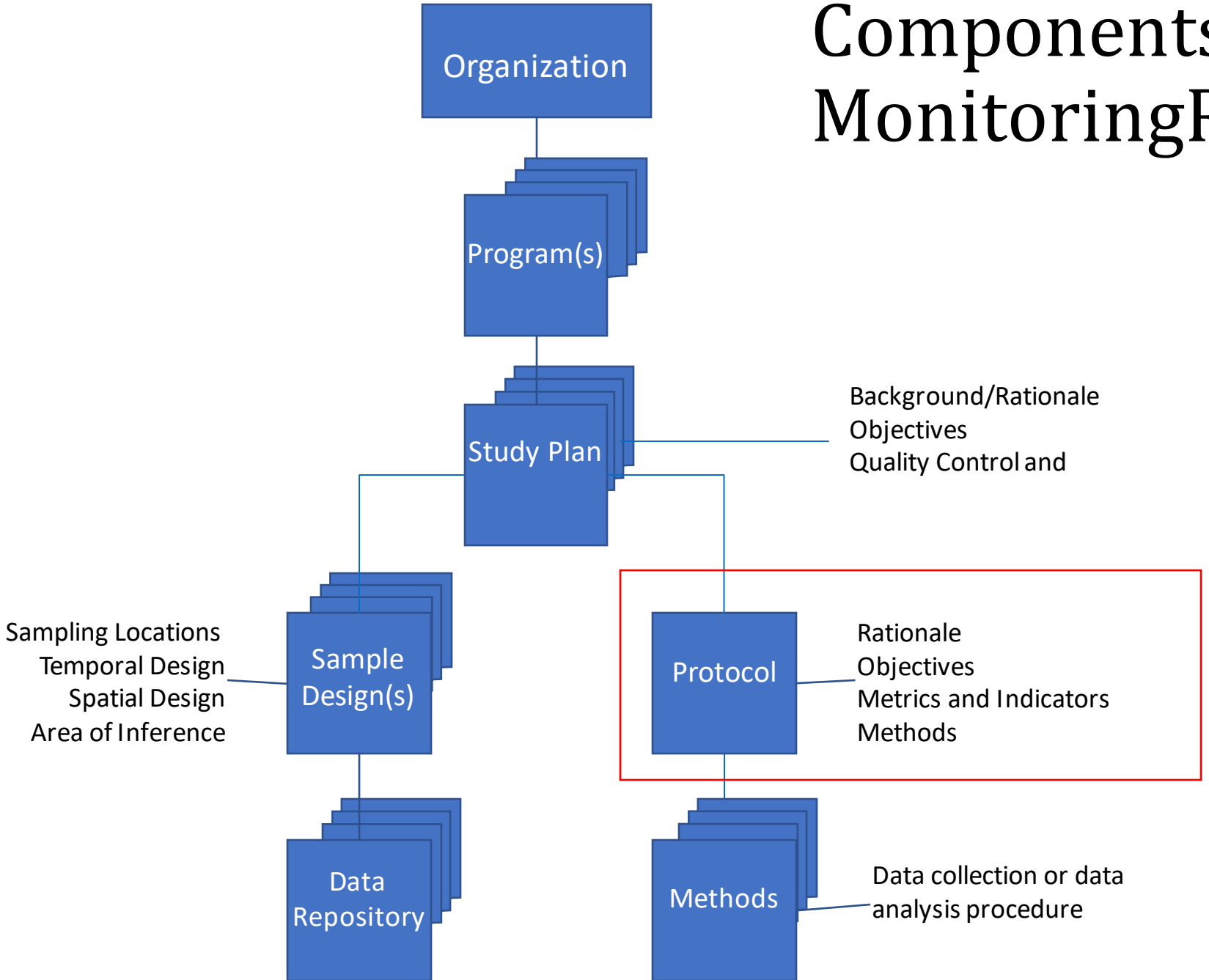
Protocols In MonitoringResources.org

Table Of Contents

General MonitoringResources.org Tips

- Login to Edit!
- If you have a question, check the **FAQ** or **glossary** in MonitoringResources.org.
- Only owners and colleagues can edit draft content or make new versions of finalized protocols.
- Components must be **Finalized** (formerly called “Published”).
- You can make new versions of your own content or clone other’s published content.
- Within components, red asterisk fields * are required.

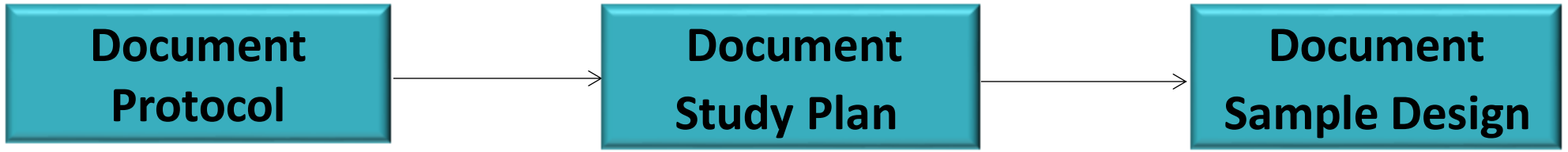
Components of MonitoringResources.org



Workflow for MonitoringResources.org

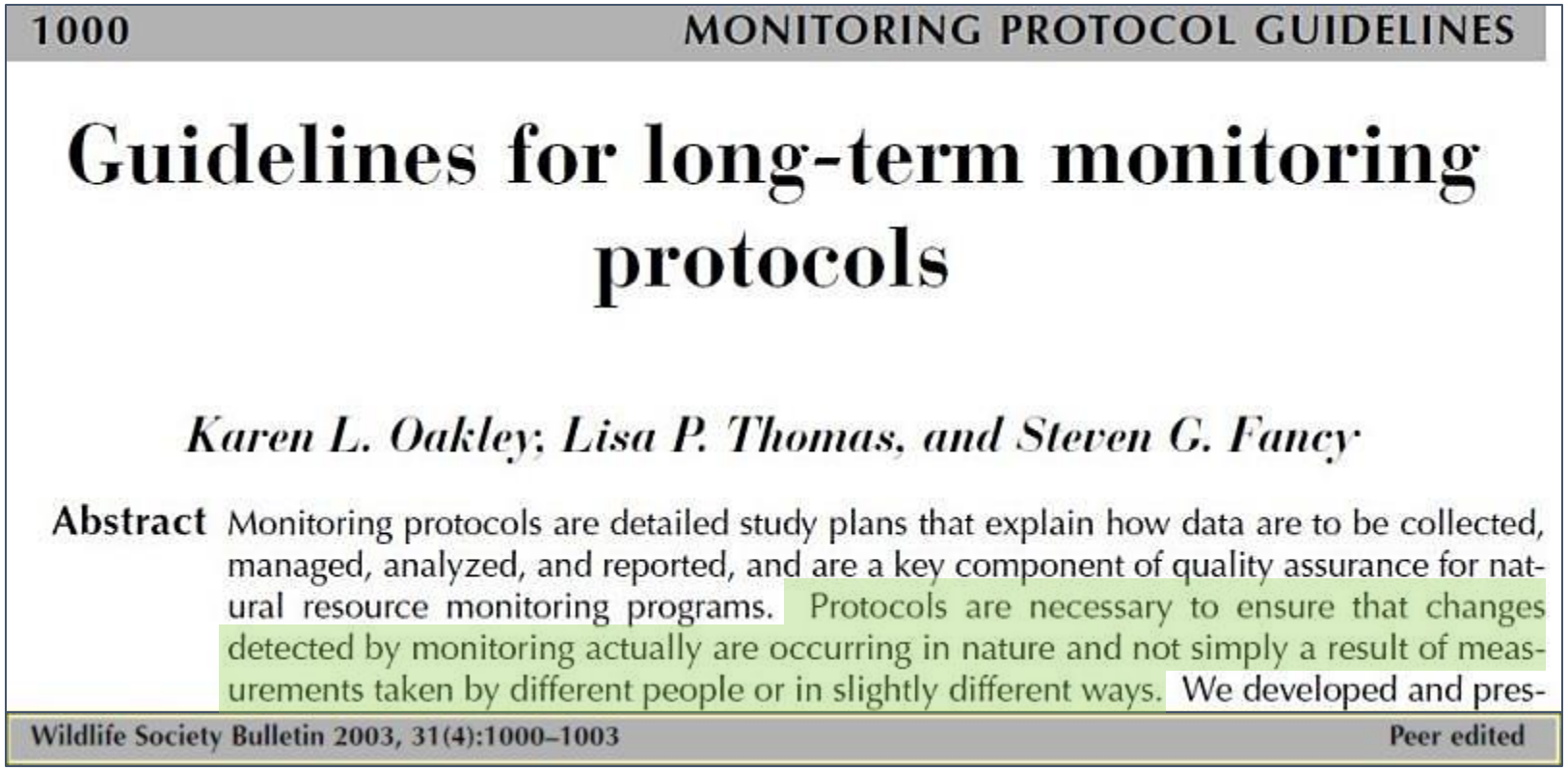
If you have a new project to document, login into MonitoringResources.org, then follow these steps:

1. Create and finalize a Protocol.
2. Create a Study Plan. In the Study Plan, link to your Protocol.
3. Create a Sample Design. In the Sample Design, link to your Study Plan.



After you complete the documentation, you can perform your field work. After performing field work for the season or the year, you can return to your Sample Design to revise planned locations to document the actual locations that you sampled, for the dates you sampled, and add post-implementation notes about each site sampled. You can use this same workflow to complete drafts of metadata that you or a colleague started some time ago.

What is a Protocol?



1000 MONITORING PROTOCOL GUIDELINES

Guidelines for long-term monitoring protocols

Karen L. Oakley; Lisa P. Thomas, and Steven G. Fancy

Abstract Monitoring protocols are detailed study plans that explain how data are to be collected, managed, analyzed, and reported, and are a key component of quality assurance for natural resource monitoring programs. Protocols are necessary to ensure that changes detected by monitoring actually are occurring in nature and not simply a result of measurements taken by different people or in slightly different ways. We developed and pres-

Wildlife Society Bulletin 2003, 31(4):1000–1003 Peer edited

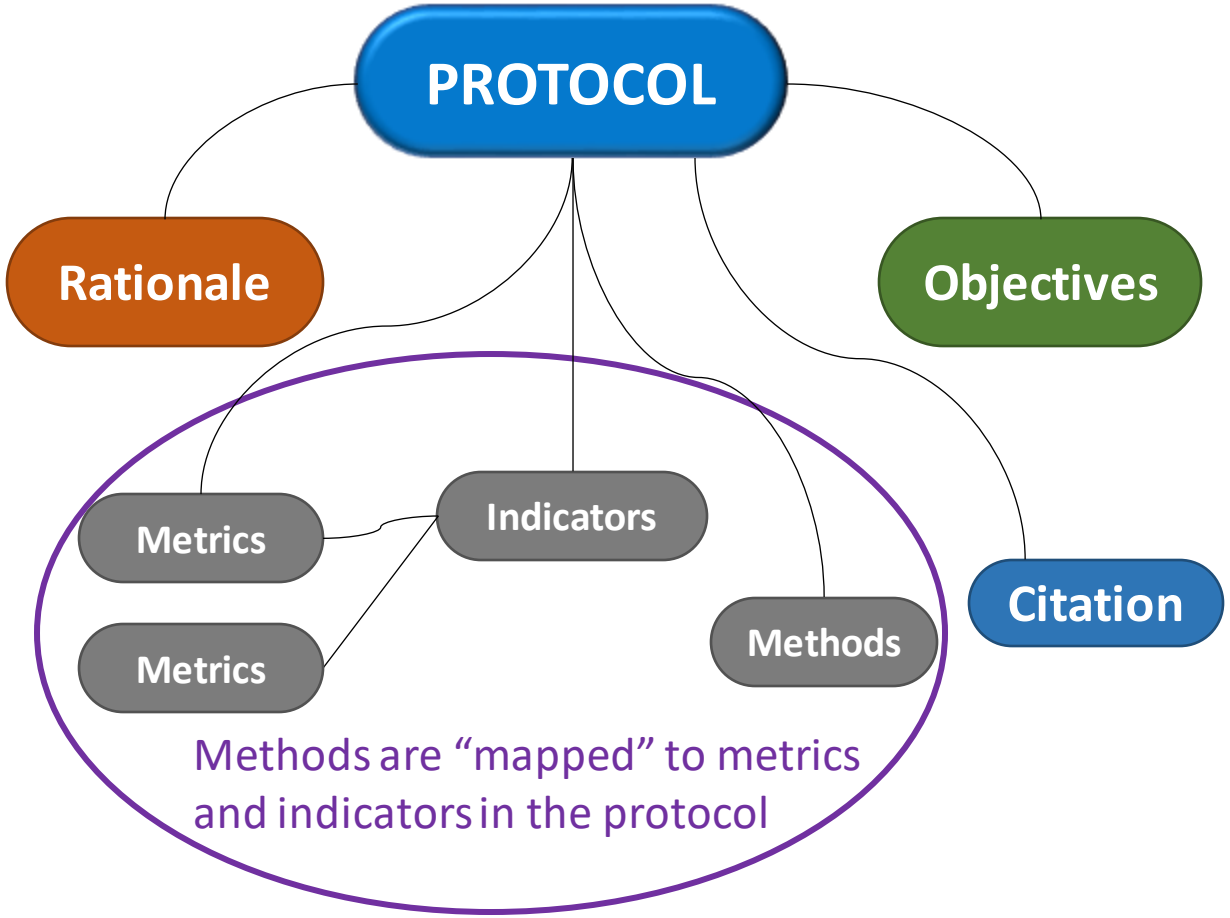
"Protocols are necessary to ensure that changes detected by monitoring actually are occurring in nature and not simply a result of measurements taken by different people or in slightly different ways."

What is a Protocol?

A Protocol is a research plan that explains how data are to be collected, managed, analyzed, and reported.

In MonitoringResources.org, the Protocol is the full documentation of the step-wise process used to collect and/or analyze the data.

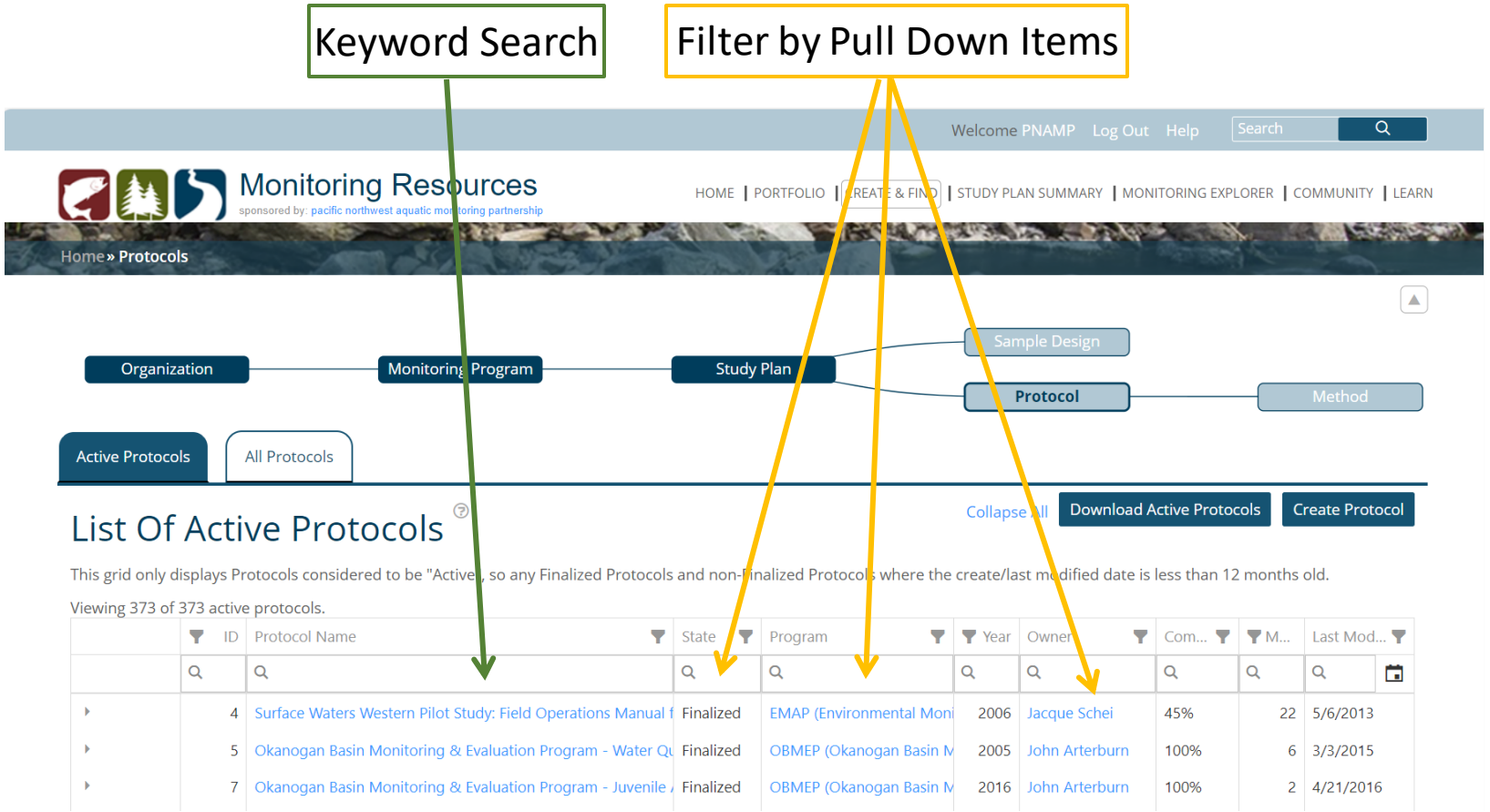
A fully defined Protocol includes Objectives, Methods, Metrics, Indicators and other elements.



Tips for Protocols in MonitoringResources.org

- A Protocol describes a planned or proposed approach for conducting work.
- A Protocol documents metrics, indicators, and methods used to obtain the variables. A Protocol can document both data collection and data analysis.
- Attach each Protocol to a Study Plan.
- A Protocol can have multiple data collection and data analysis methods.
- **Data analysis only** Protocols can be, for example, a population analysis that includes habitat covariates and genetic variables, all collected from different areas, possibly with different study plans and data summarizations.
- 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" or as a new version of the Protocol. 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.
- Update your Protocol when:
  - you modify methodologies or remove a study element (Metric or Indicator), you should develop a new Protocol **version**. If elements and methodology remain consistent from year to year, Protocols don't need to be updated.
  - a Protocol doesn't reflect the work described in the study element (or work element for BPA projects).

Search for Protocols



Search for content

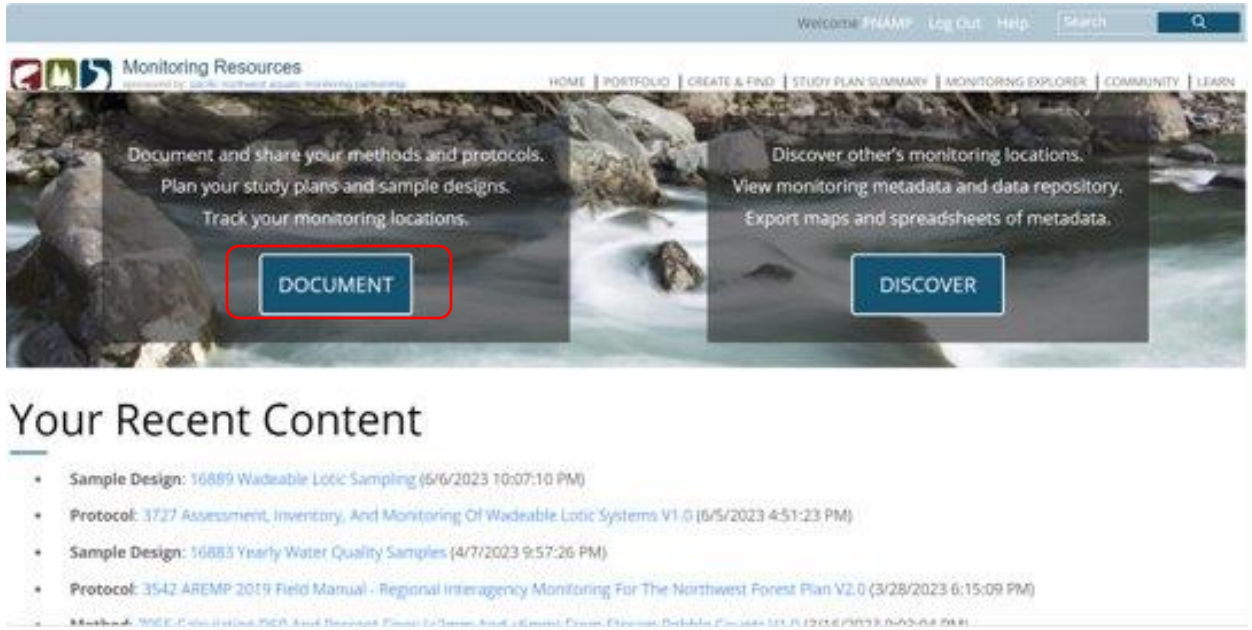
Search for Protocols in the protocol library by:

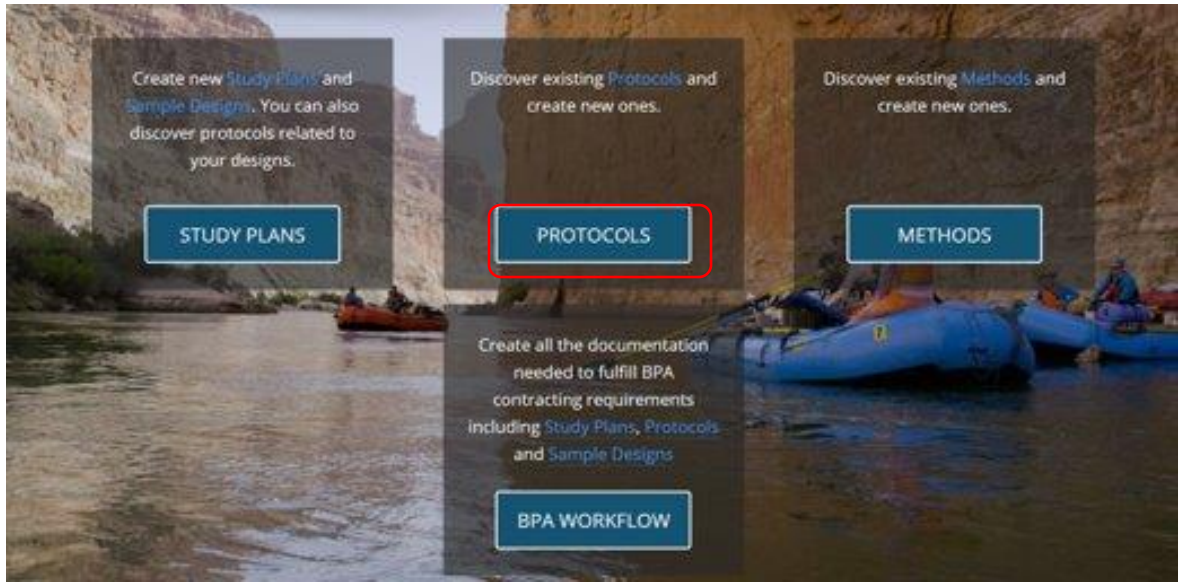
- Use **keywords** in the Protocol Name
- Use columns to filter to:
  - Only see Finalized content
  - Identify a specific Program
  - Identify a Specific Owner

Find Protocols

Create or search for new content
You can search for content without being logged in, but to create content, you must log in to MonitoringResources.org.

From the home page select **DOCUMENT.**

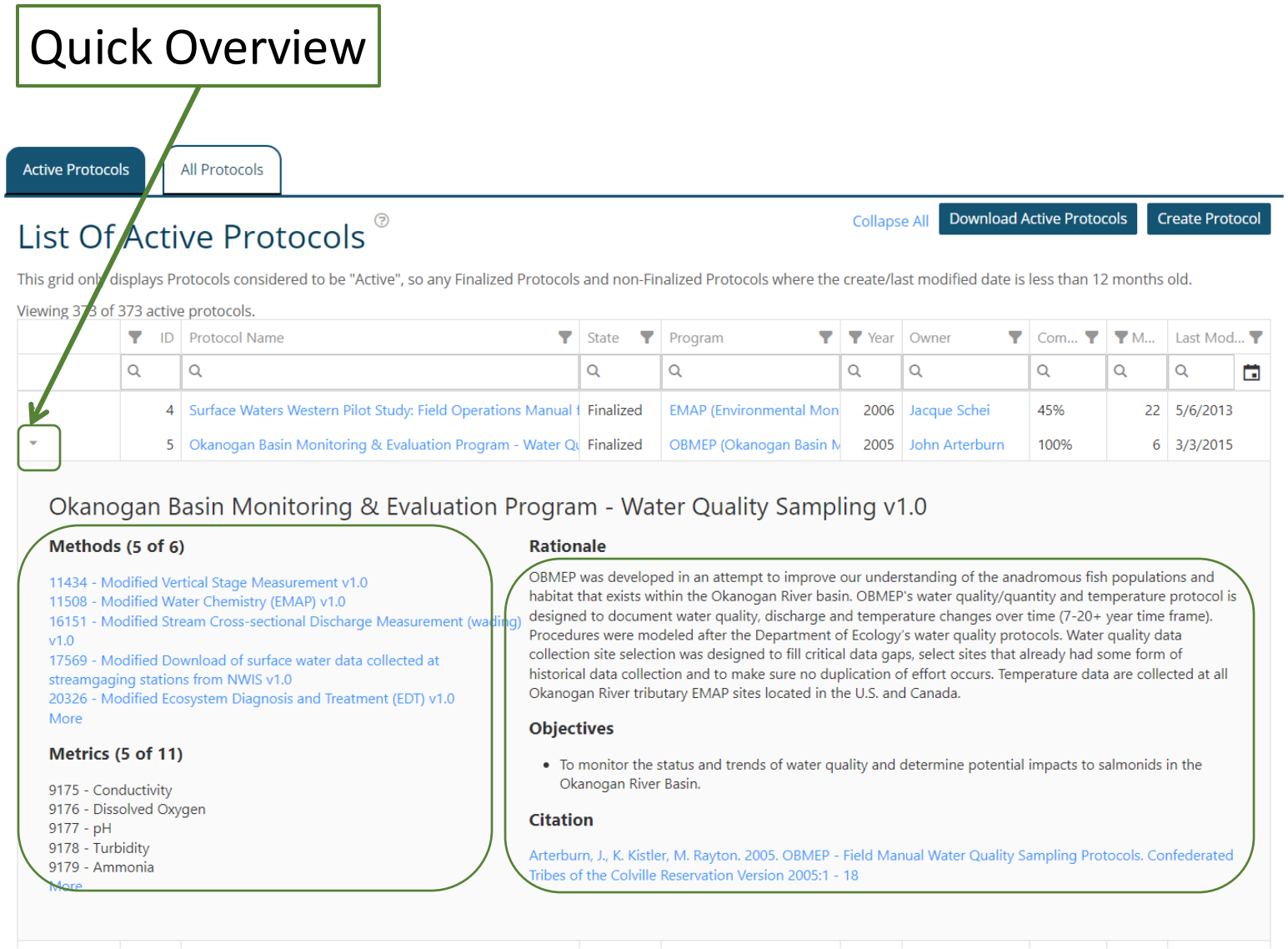




Then, from the Document homescreen, select the documentation type you would like to create or search for (METHODS, **PROTOCOLS**, or STUDY PLANS).

You can also create all documentation needed to fulfill BPA metadata contracting requirements by selecting BPA WORKFLOW

Search for Protocols



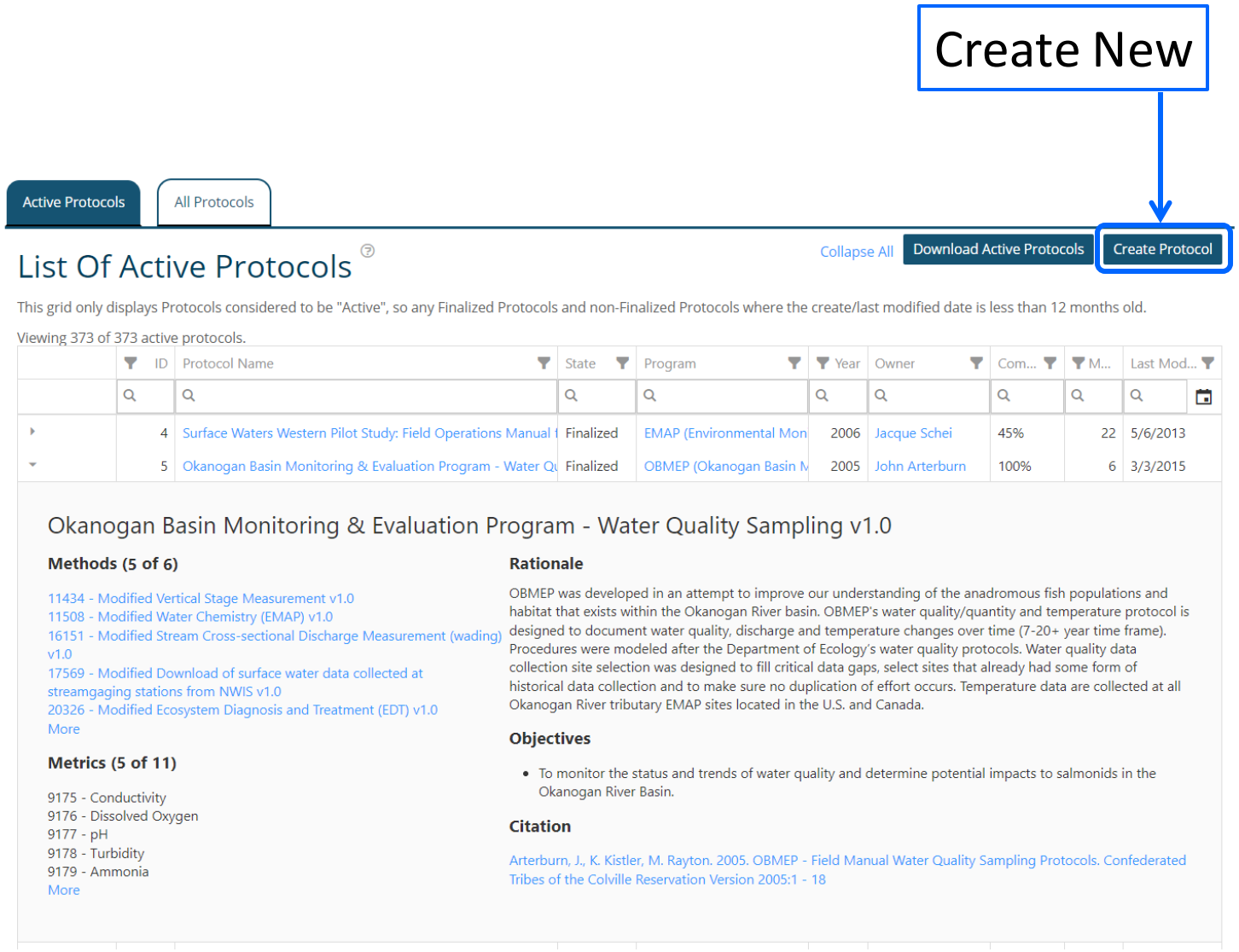
Search for content

After you've narrowed down your search, you can get a quick overview of a Protocol before committing and opening it up as a new web page.

The overview will provide:

- A list of Methods
- A list of Metrics
- Protocol Rationale
- Protocol Objective(s)
- Citation

Create New Protocols



Create new content

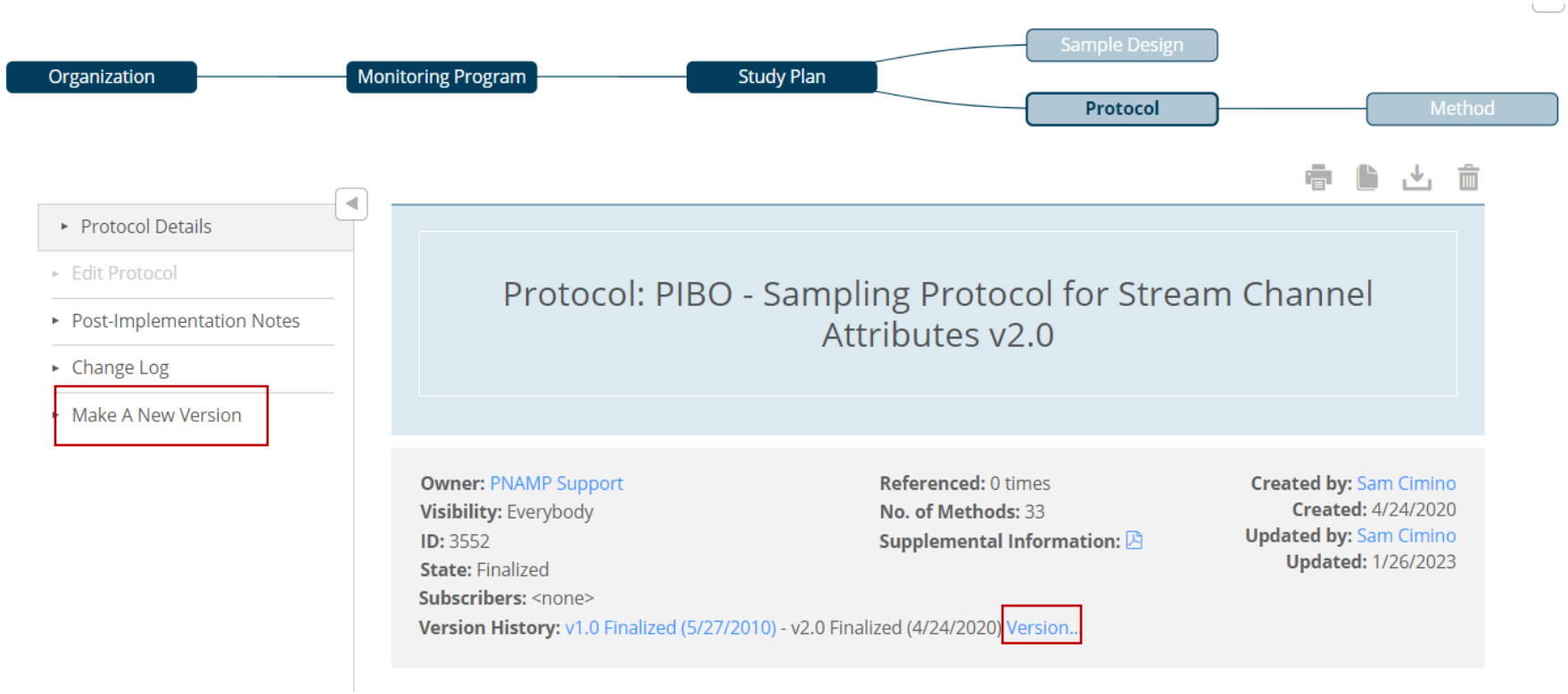
If you can't find a Protocol to use "as is" or a Protocol similar enough to clone and then adjust, you can create a new Protocol by clicking the **Create Protocol** button in the upper right-hand corner of the List of Protocols.

Versioning Protocols

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

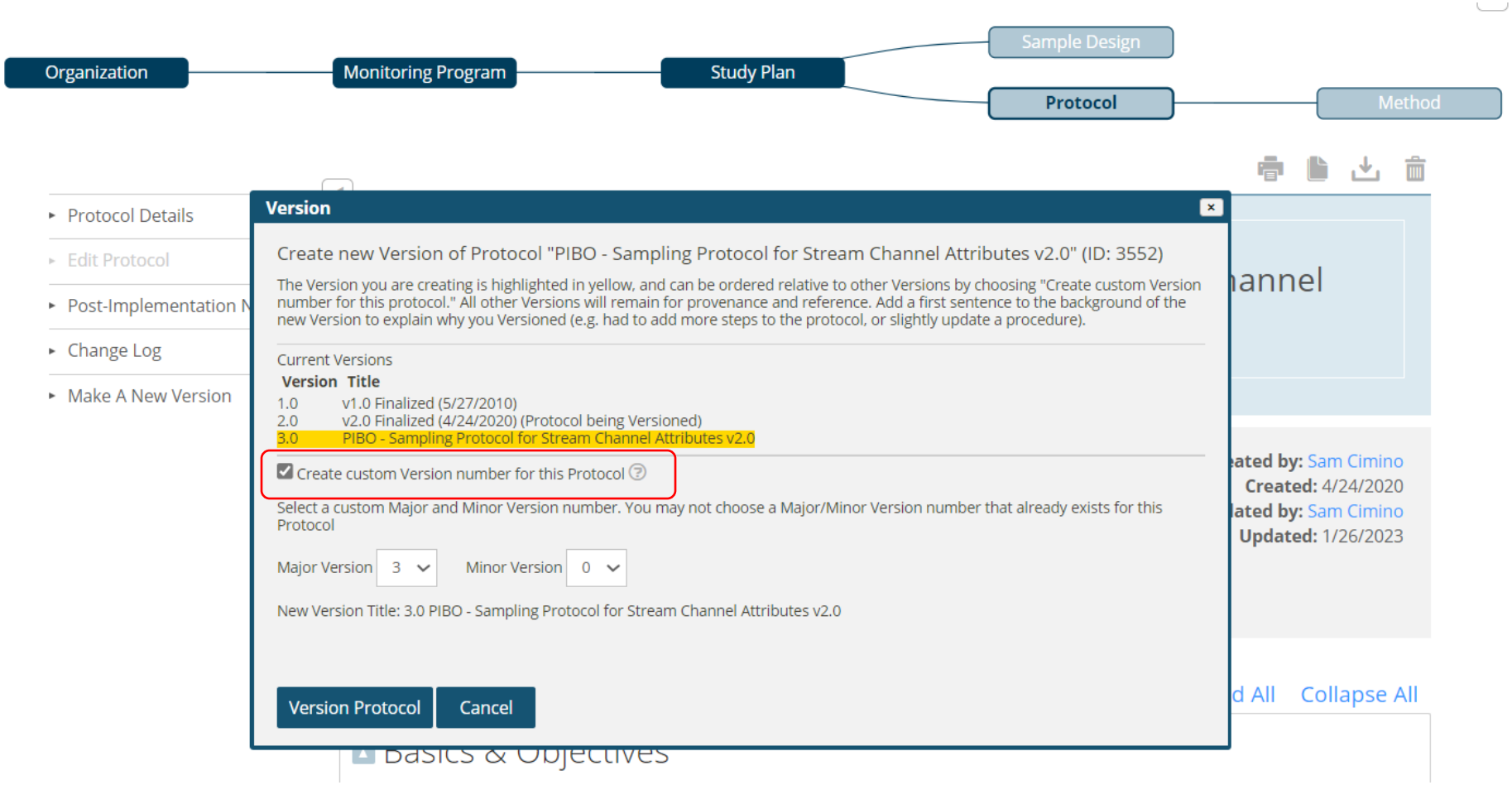
There are two ways to version a Protocol. You may: 1) Use the **Make a New Version** tab; or 2) Use the "**Version**..." hyperlink.

Changes are tracked in the Change Log, though it is helpful for future reference to add a sentence to the background in both the original and 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.***



Create a new version of a Protocol by clicking on the "**Make A New Version**" button or the "**Version...**" hyperlink next to Version History.

Customized Versioning

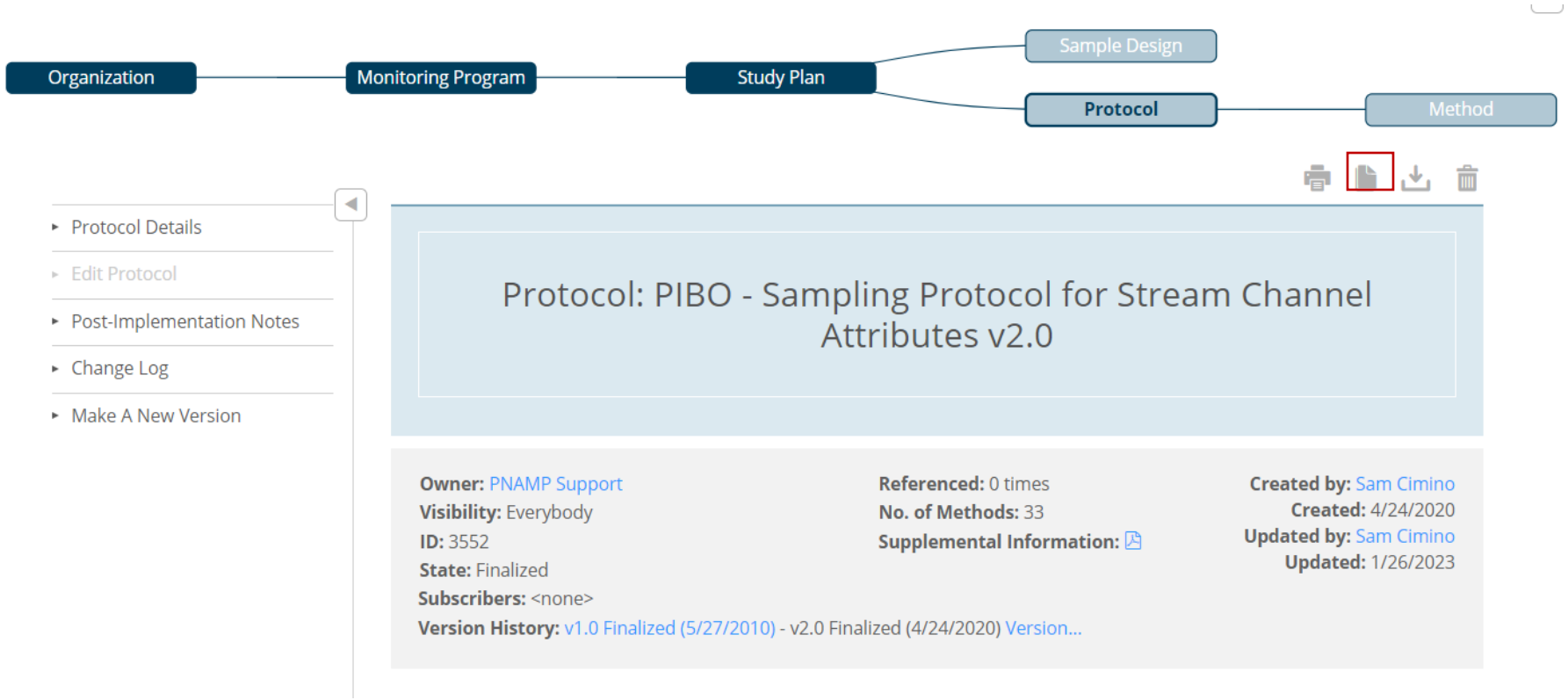


When versioning your protocol, you can select this **checkbox** to modify the Major and Minor Version numbers, so that you can place the Version in the appropriate location relative to other existing Versions (e.g., back in time from the current one, or in between two other Versions, etc.). **You may not choose a Major/Minor Version number combination that already exists.**

Clone a Protocol

If you find a Protocol that depicts a similar monitoring investigation to yours consider that it may be easier to Clone an existing protocol than creating a new protocol. **Only *finalized* protocols may be cloned.** Search for protocols in the List of Protocols using keywords, author name, or a combination of search options. If you find a protocol that is similar to your monitoring investigation, select that protocol, then choose the Clone button on protocol details page you wish to clone.

After you clone a protocol, check every section to ensure the protocol meets your needs. Once you have edited the protocol to accurately describe your monitoring, request finalizing. [This short video explains how to clone a protocol](#).

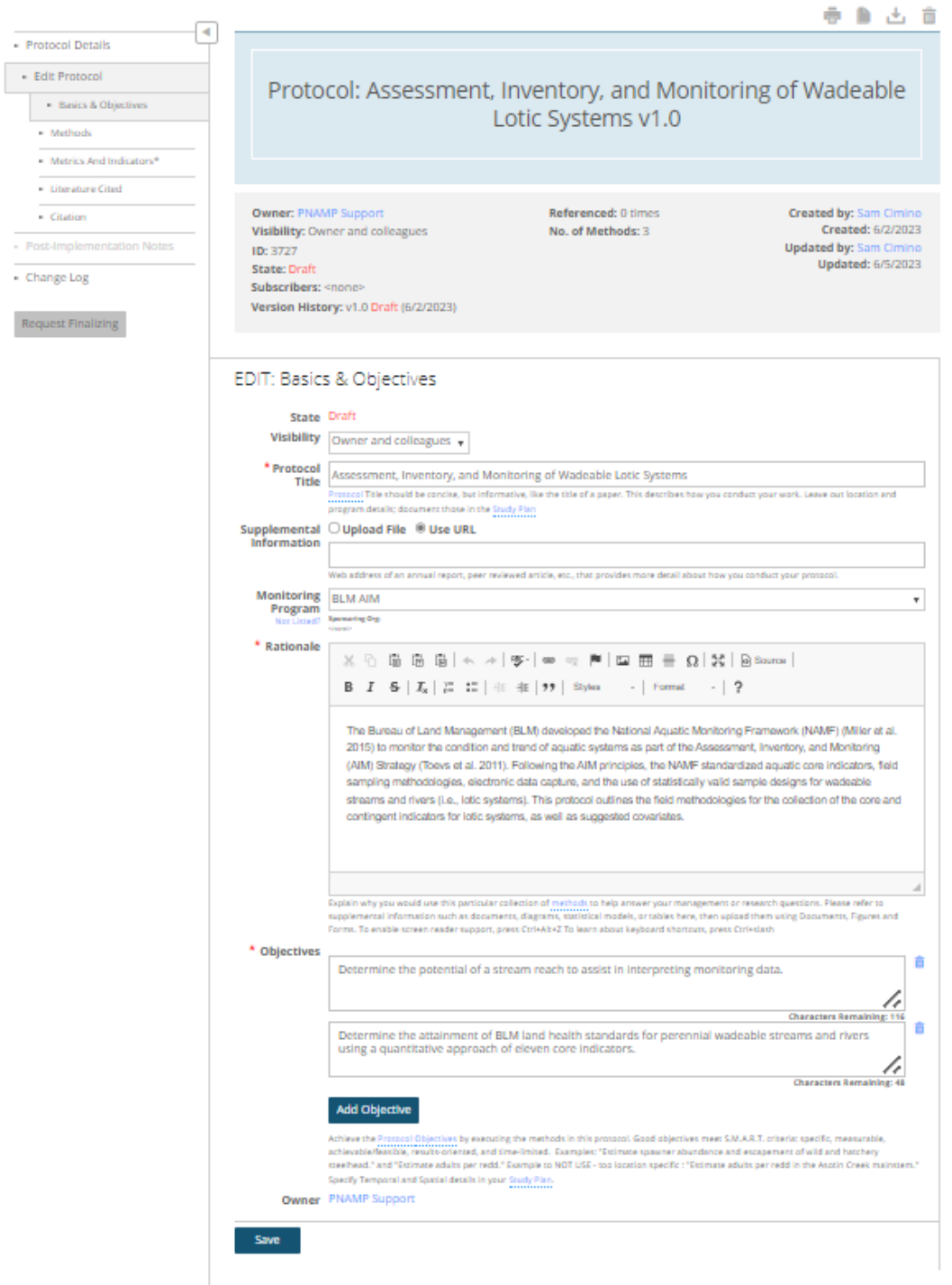


Click the **clone** button on a **finalized** protocol to make a copy of the selected protocol which you can modify.

Edit Basics & Objectives

To edit Basics & Objectives on a drafted Protocol, click on **Basics & Objectives** under the **Edit** tab.

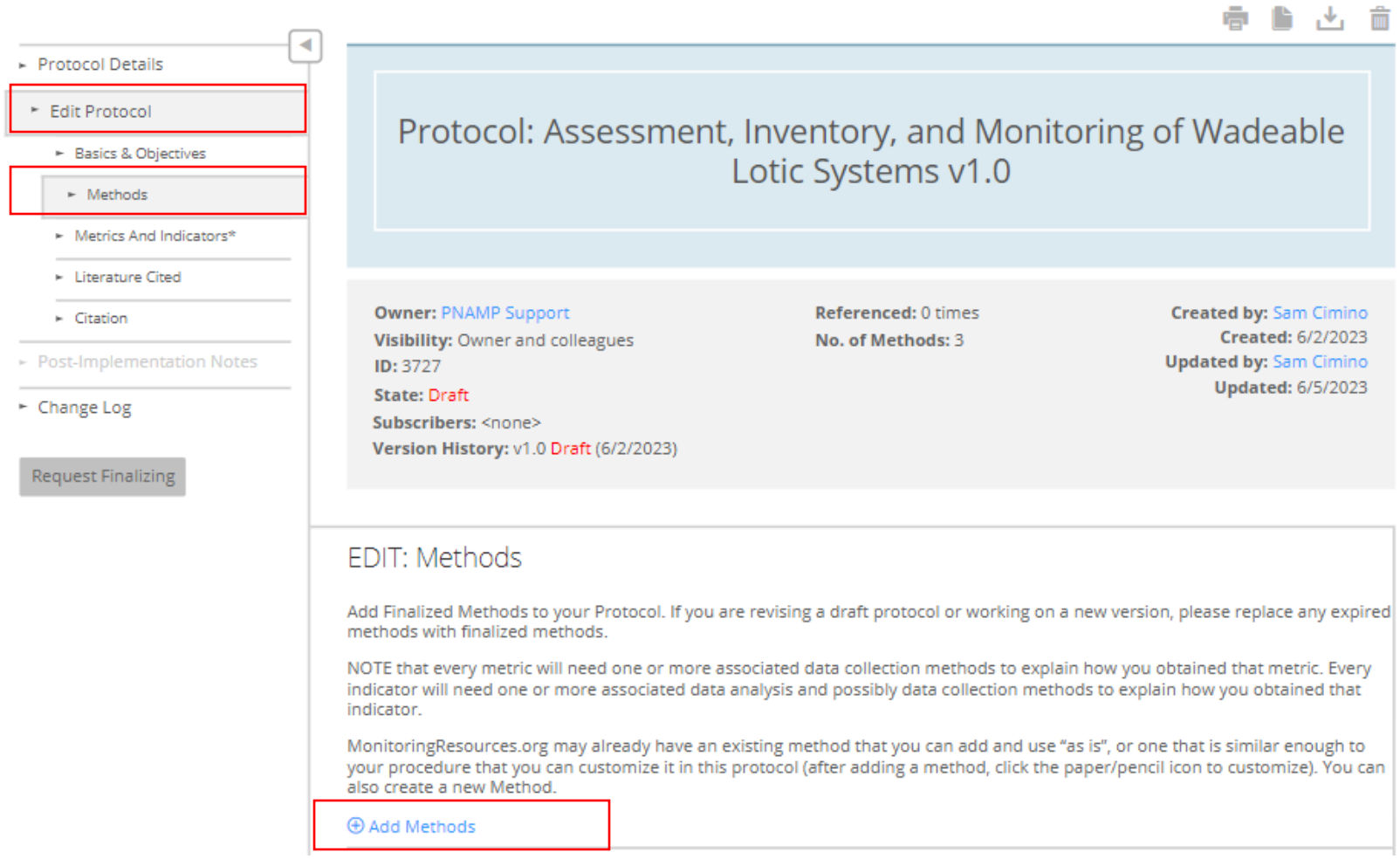
All fields marked with a red asterisk * are required.



Add Methods to a Protocol

To add a **previously finalized** method to your protocol, open the protocol in which you would like to add the method. You must be the owner of the protocol to add methods. After you open the protocol, click on the **Edit Protocol** tab in the left hand column and select **Methods**, then click on the **Add Methods** button to search for methods or have a list of methods suggested to you based on your list of metrics and indicators.

Before creating a new method to add to your protocol, search for a previously created and finalized method in MonitoringResources.org to use "as is" or to customize to fit your protocol. See the [short video explaining the customization procedure].



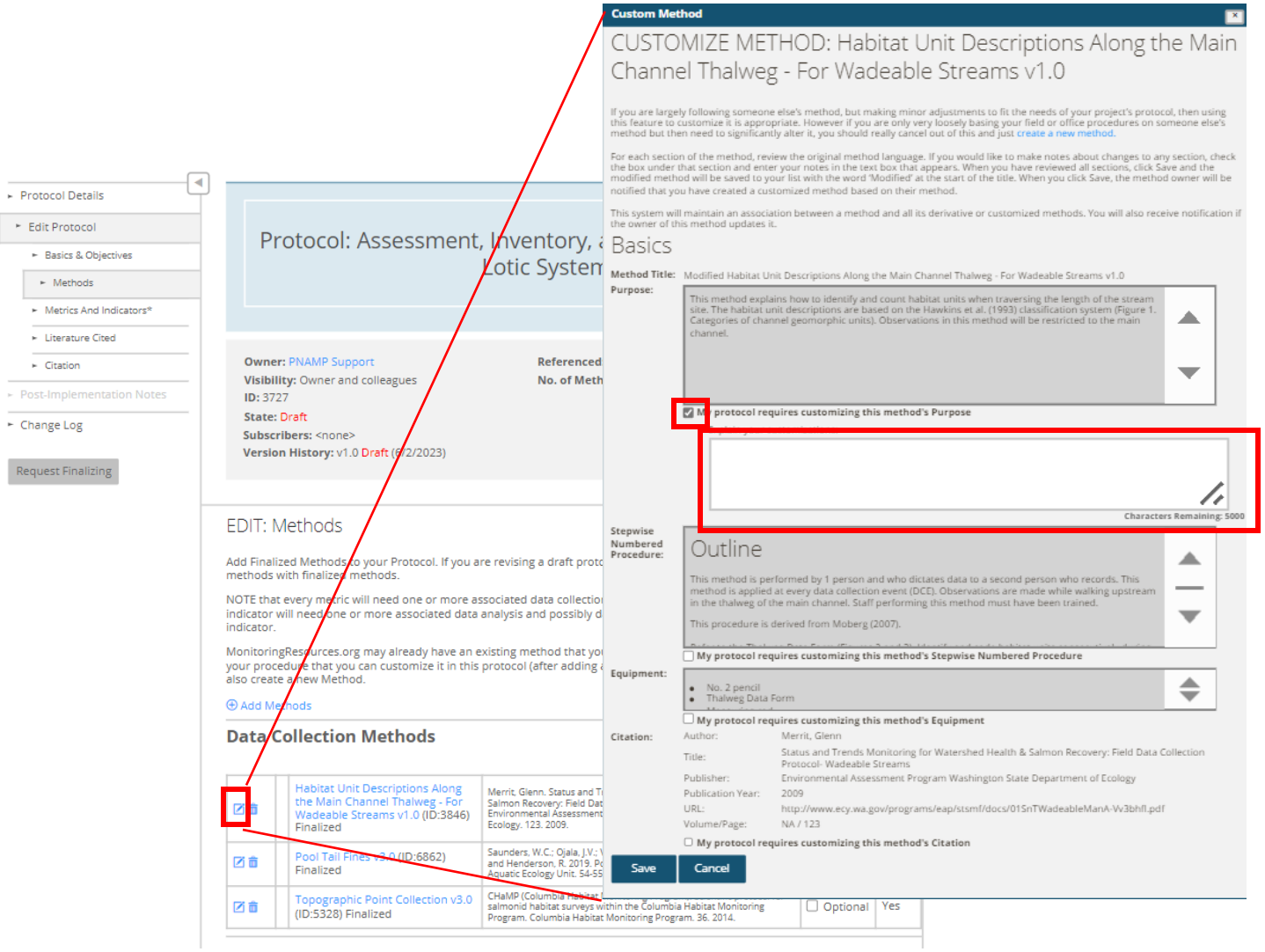
Customizing Methods In a Protocol

If you find a finalized method that is similar to your procedure but differs slightly in the purpose, 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 slide), 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.

NOTE: You can only customize a method owned by someone else. You cannot customize a method in which you are the owner. If you need to make changes to a method you own, you can "Version" the method (see the Method Training Module).



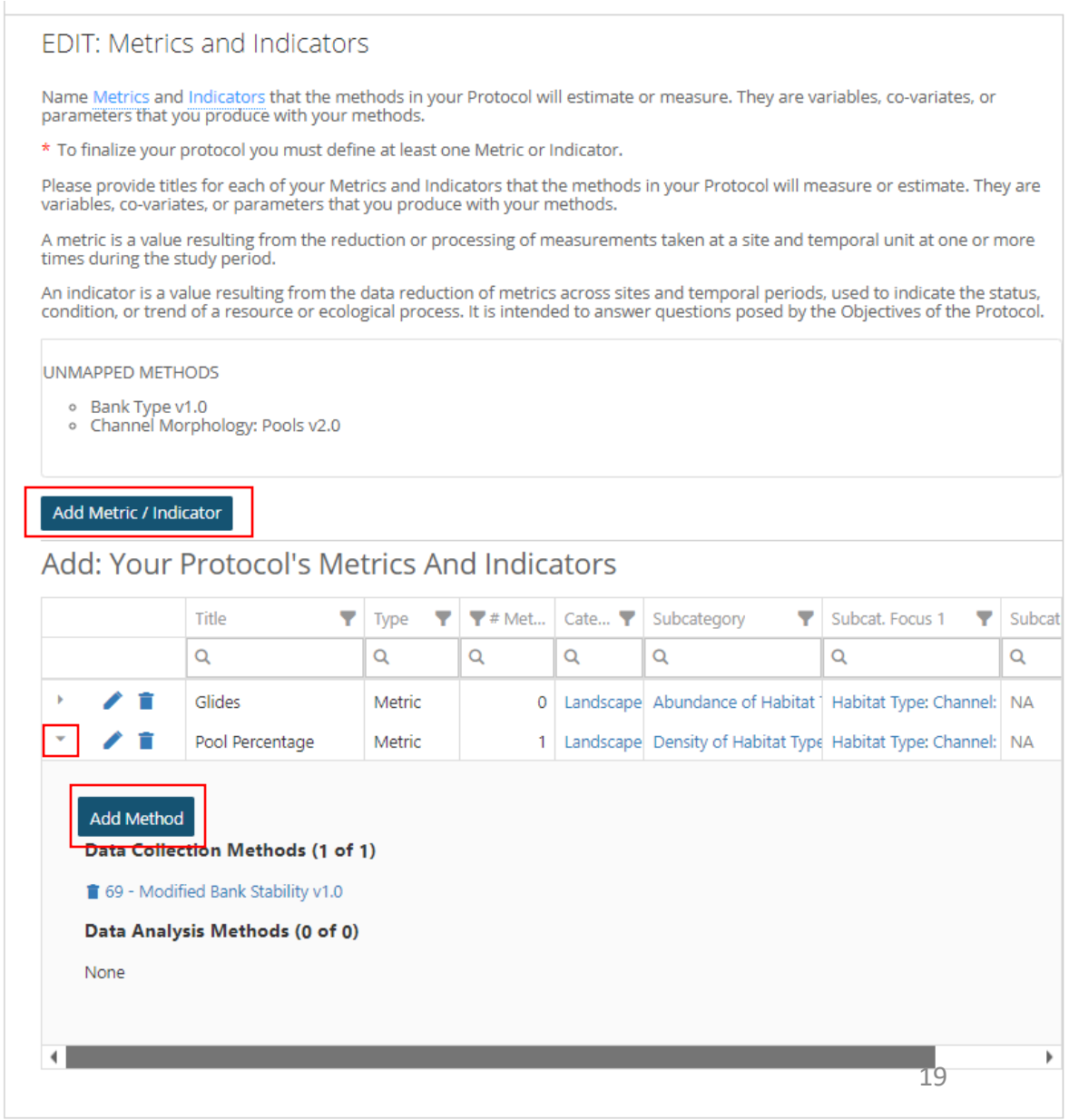
Mapping Methods to Metrics and Indicators in a Protocol

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.

After adding metrics and indicators to your protocol, **map each one to appropriate methods**. Mapping to methods enables you to check that every metric or indicator can be calculated, determined, or estimated by a specific method or set of methods. Mapping also suggests preferred methods to other users that correspond to your variables and parameters. 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.

To map your methods and metrics, click on Edit Protocol and select Metrics and Indicators. First add your Metric/Indicator to the table by clicking the "Add Metric/Indicator" button and fill in all the fields. Then to map methods to metric/indicator 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.

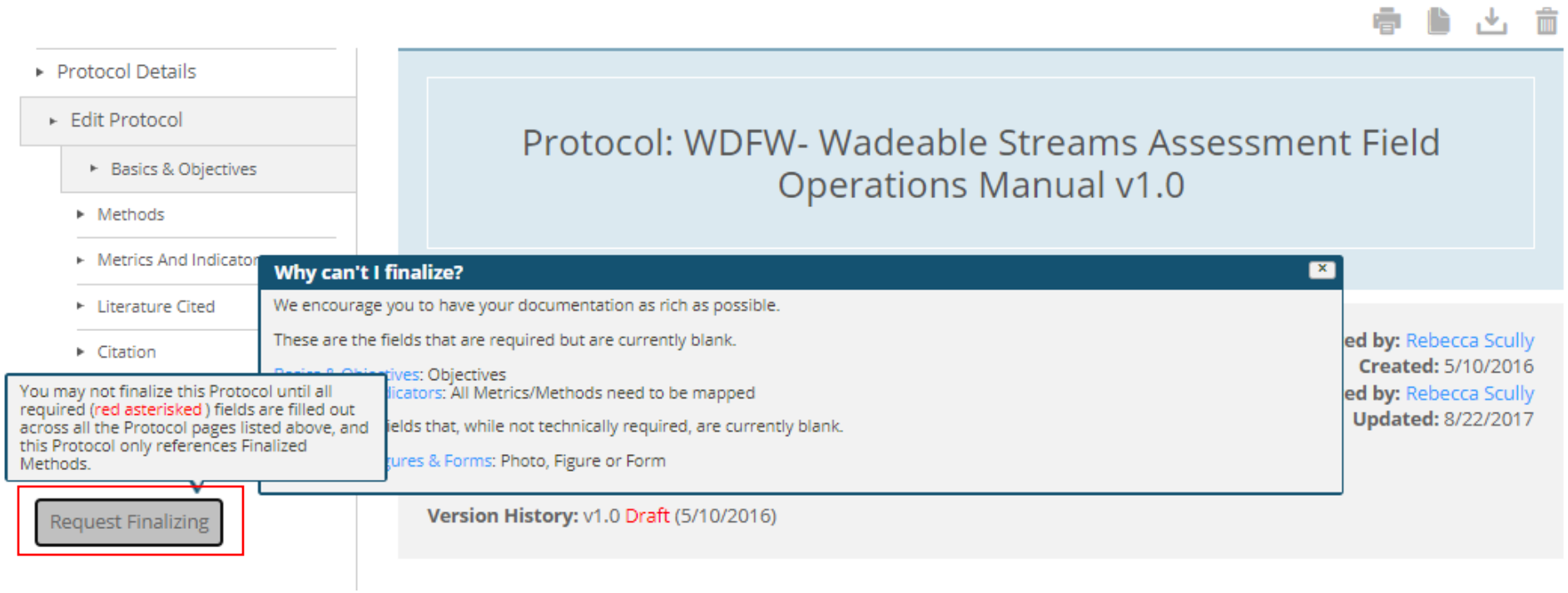


Request Finalizing of a Protocol

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



Protocol Review Process (Finalizing)

PNAMP staff review for consistency with related attachments and system requirements (not for scientific validity). After review, staff will either **Finalize** or **post comments** in MonitoringResources.org and alert you via email if issues need to be addressed.

If edits are needed, we request that the Protocol owner edit as needed or respond to comments to describe how the changes aren't warranted.

After you edit your Protocol or address the comments, you will need to **resubmit** the Protocol for finalizing by clicking the "**Request Finalizing**" button.