Monday.com NARWC Data Access Review and Processing
Updated 2023-05-11

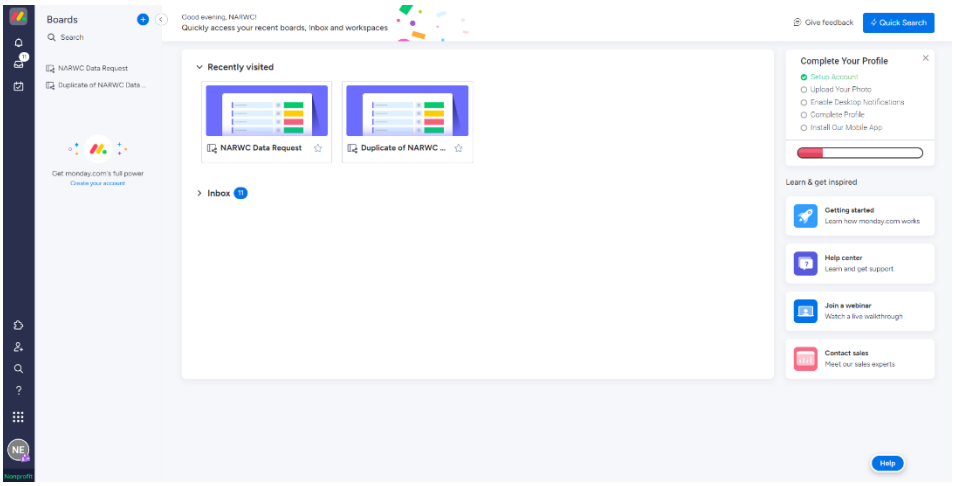
LOGIN

1.You will all receive an invite to join Monday.com as Guest (if you are NEAq staff you will be added as an onsite member)

2. Create your Monday.com login

3. Login to Monday.com. If you are a "guest" you will see a screen that looks similar to this.

Note If you are an NEAq employee, your screen will look a bit different and you will need to get into the NARWC workspace before you can see the Data Request Board.



4. On this main page, you can perform a few account actions:

a. Complete your profile (if you would like)

b. Check out your notifications

The bell icon is where you receive all of the information that's specifically relevant to you

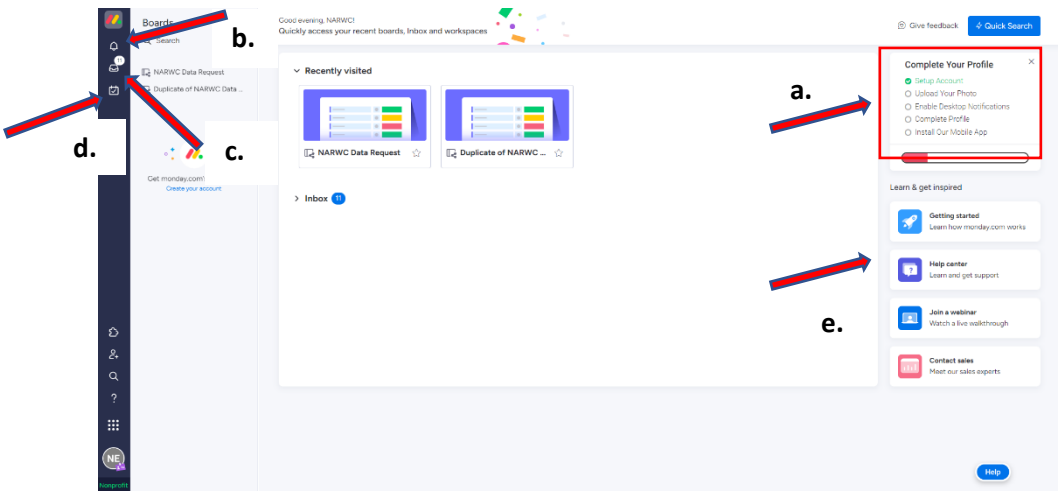
c. Check out your inbox

This is where you can see all of the new updates from various board/projects you are subscribed. For now – most of you will only be subscribed to the data access board. But once we migrate other actions to Monday.com (abstract review for meetings, etc.) you may be on multiple projects. You can learn more about the inbox here

d. My work

This is a great way to see everything you are assigned. For now, this will be limited to action items associated with data access. But down the road may include other items such as meeting prep, abstract review, etc. Learn more about My Work.

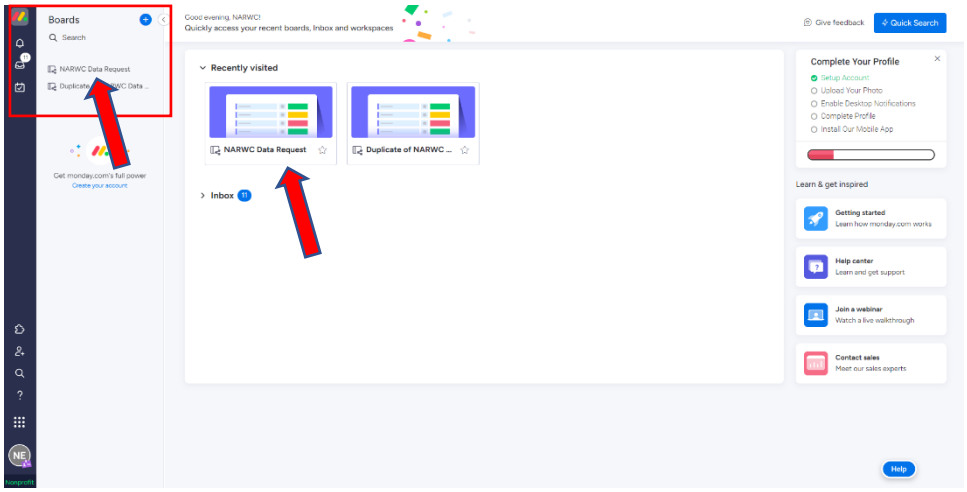
e. Feel free to poke around here and utilize some of the learning modules if interested



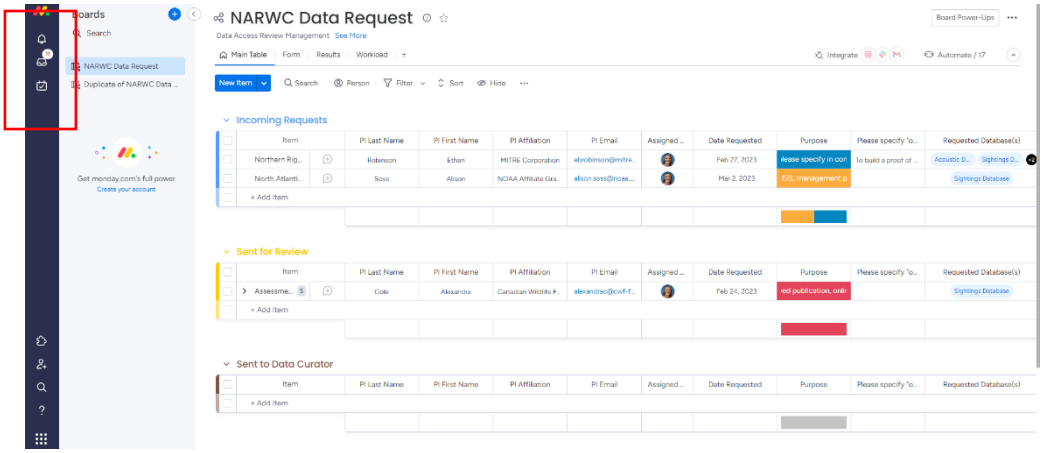
Monday.com Boards

Monday.com is organized into Workspaces and Boards. As a Guest, you will have access to various Boards that are shared with you. Think of Boards as themed projects. In our case, the Board we are working with now is the NARWC Data Request Board.

*NEAq folks – again you will have access to various in-house workspaces as well as the shared NARWC Boards.

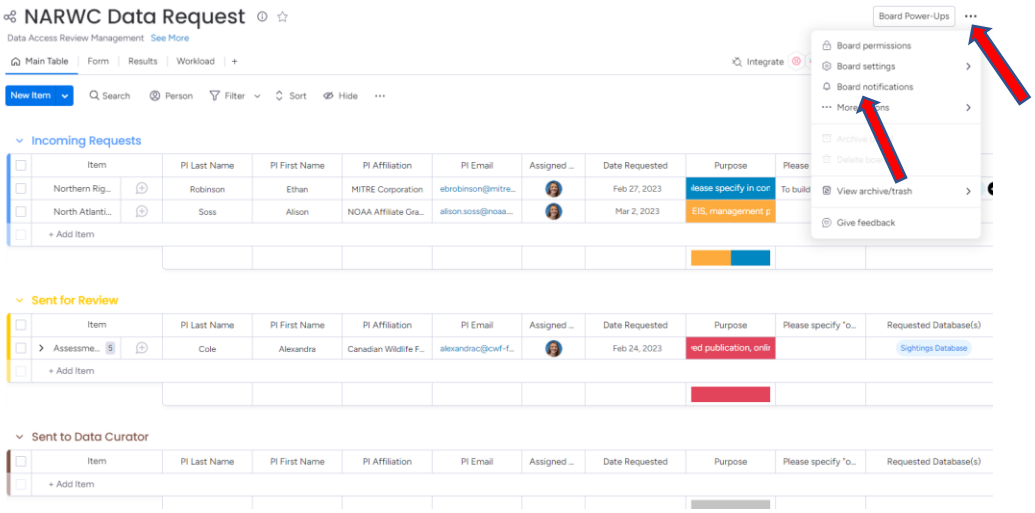


When you click on the NARWC Data Request Board (which you can access via either arrow route above), you will see this page. Notice that you still have access to the notifications, inbox, and your work from the Board

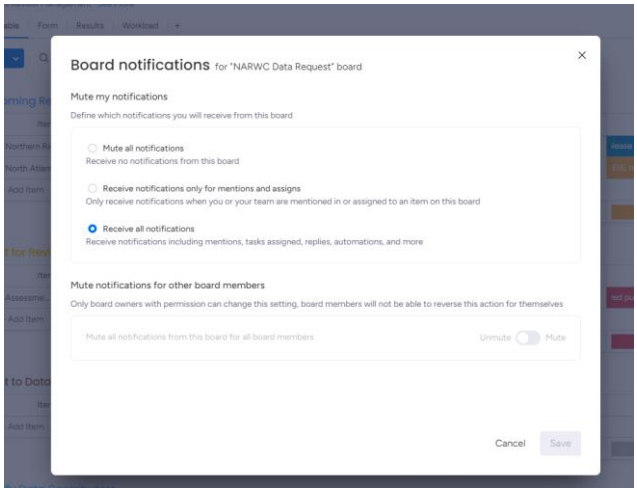


The first thing you will want to do when you get into the Board is decide how many/few notifications you want to receive from this Board. You can control this by clicking on the upper right corner ellipsis and then Board notifications.

THIS IS IMPORTANT – YOU DO NOT WANT NOTIFICAITONS EVERY TIME SOMEONE DOES SOMETHING IN THE BOARD!!

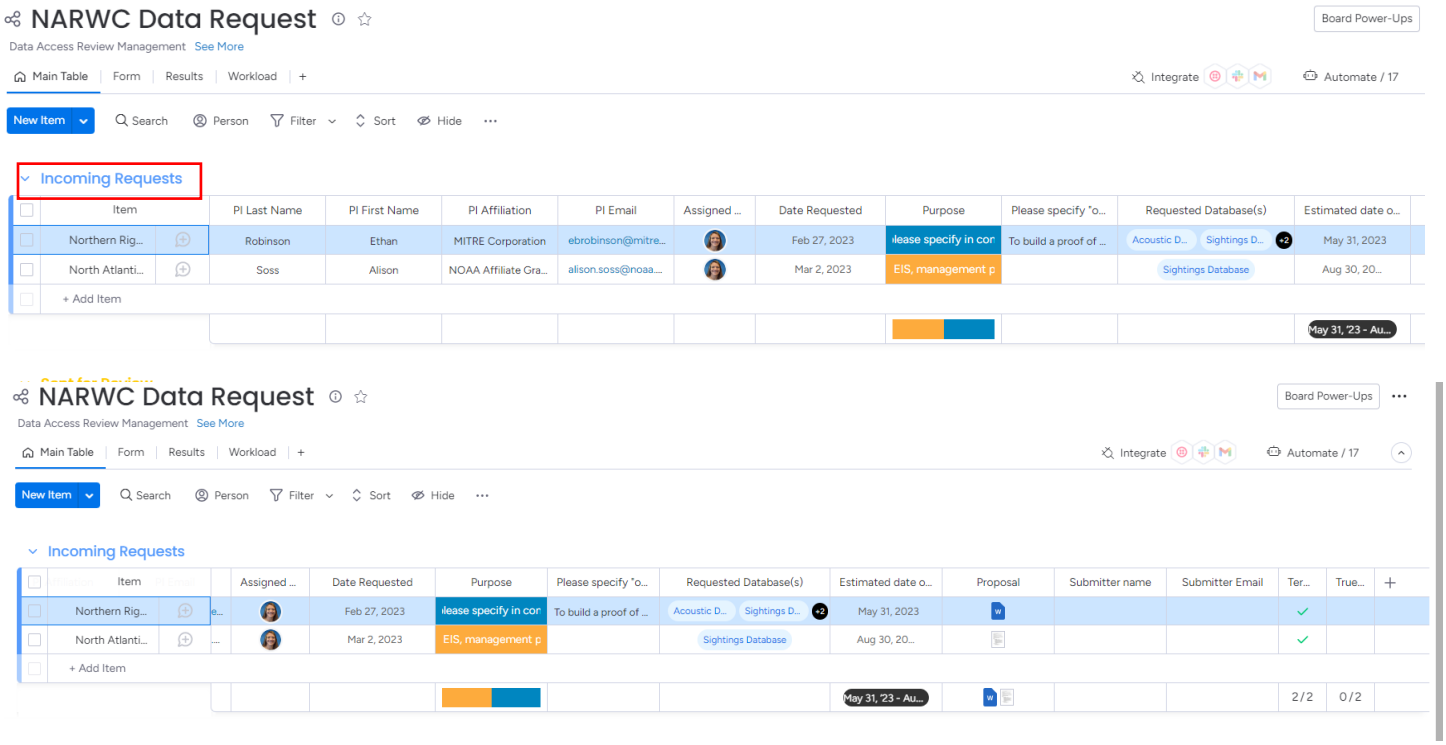


Select which notifications you would like to receive and click save. I don't suggest fully muting notifications unless you know you will check in regularly. The middle option is a good choice and will ensure you receive notice when tasks have been assigned to you but you won't receive a notification every time something happens in the Board.



NARWC Data Access Board

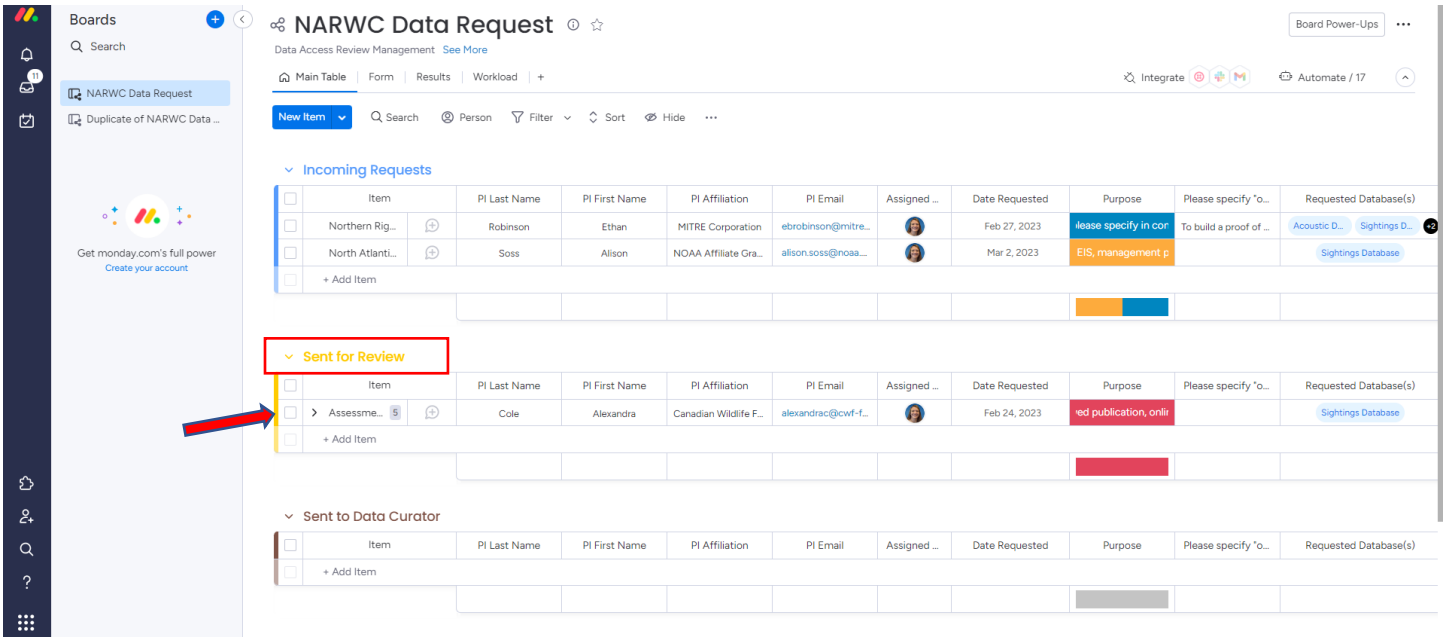
Monday Board are organized into "Groups." The first group you see on the NARWC Data Access Board is "Incoming Requests." Each item (row) in this group is auto populated when someone fills out the [Data Access Request Form] (which, as a reminder, is available via the [NARWC Website]).



Here you can see that we have two data access requests that have been received and have populated this group, each as an item row. All of the information that is captured in the data access request form is pulled into columns in this group. In the second screen shot I have scrolled to the right so that you can see all of the columns for each access request row.

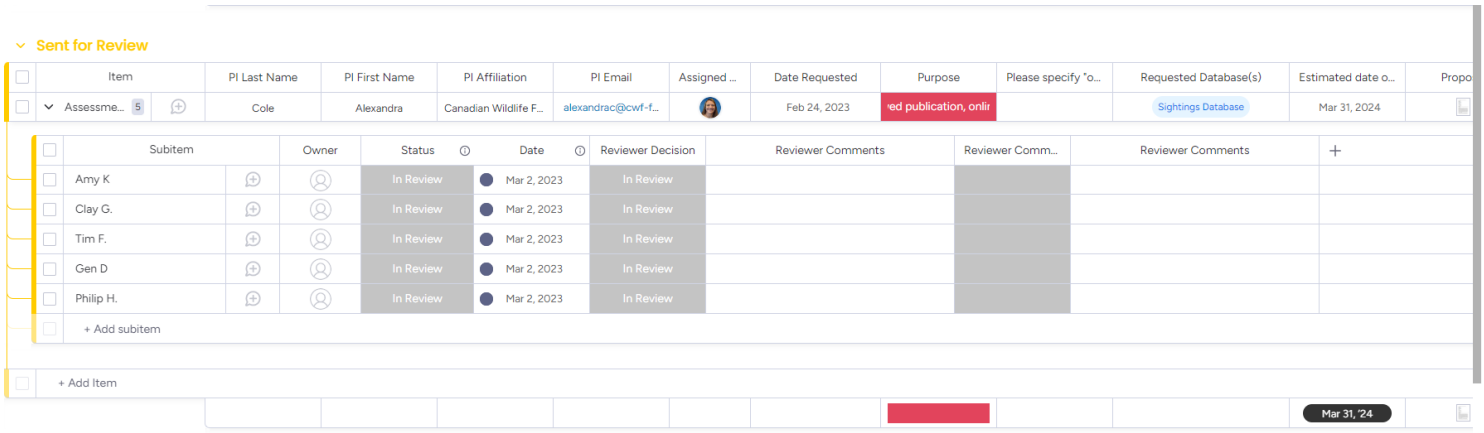
When a data request is received and the information populates this Incoming Requests group, the item is automatically assigned to a Data Access Coordinator and they receive an email that a request has been uploaded. The Coordinator will make sure that the all of the necessary information is present and there aren't any obvious clarifications needed. Once

we deem the request to be ready for review, the coordinator will change the **Review Status** to "**To Review**" which will automatically send the item to the next group, **Sent for Review**.

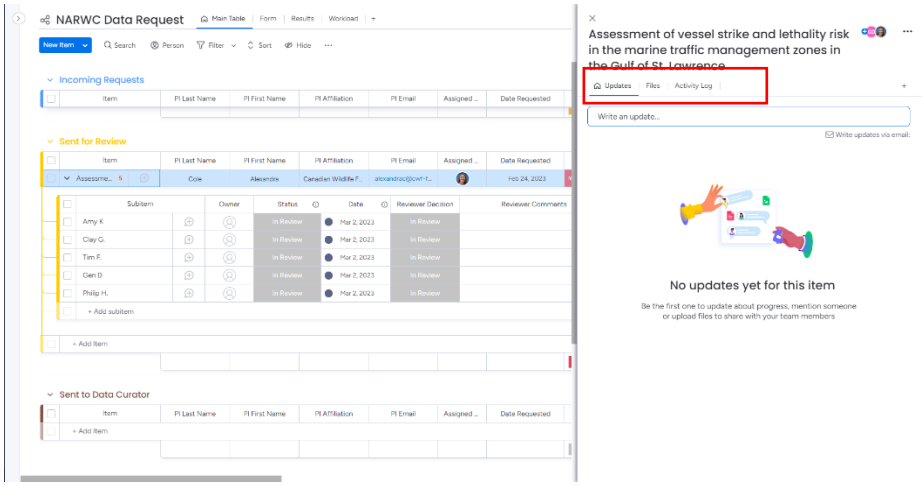


One the access request item has been moved to **Sent for Review**, the coordinator will assign reviewers, including appropriate data curator(s). You will receive an email that you have been assigned a review. You can access your review by the email or by going into Monday.com directly.

Once in the Board and in the Sent for Review group, you can see who has been assigned the review by clicking the > to the left of the item name. Once you click, you will see all of the reviewers who have been assigned. You will also see the review deadline data, which automatically sets to 30 days after the reviewers have been assigned.



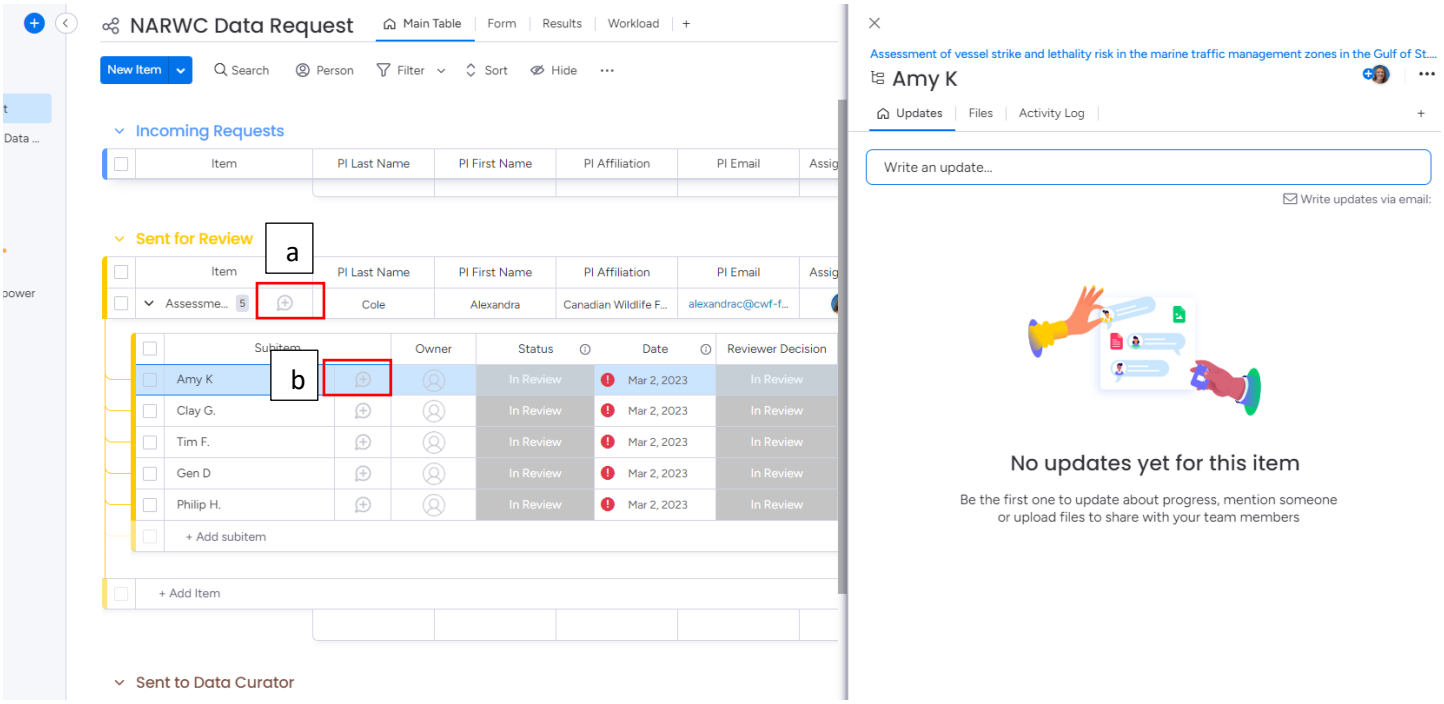
In the parent item, you will find all of the request information (be sure to scroll to the right). To access the uploaded request, you can either click the file directly in the item line or, open the item page. To open the item page, place your cursor over the item title and click on the double arrow.



Clicking open page item will bring up a page that will store all of the information and activity related to the request. The **Updates** tab will show you any comments, mentions, or upload history. The **Files** tab will include the uploaded proposal for you to review as well as any additional materials uploaded. For example – if there is a clarification on the proposal needed, a requester may be asked to upload additional information and this is where that will be available. The **Activity Log** will show you everything that has happened with the item, from submission through current status.

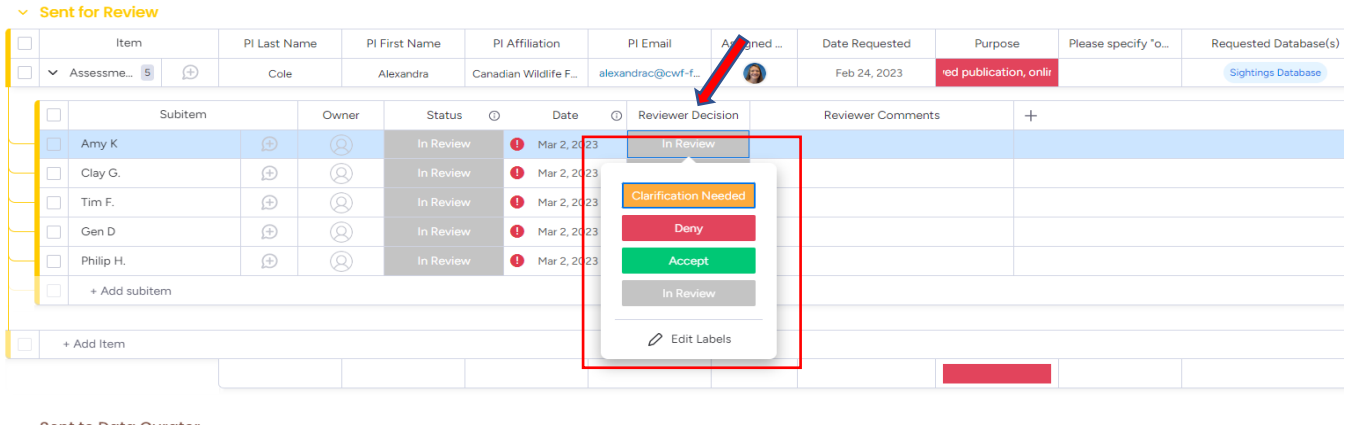
As you go through your review, you may have comments and/or questions.

a. If you have a comment/question that is appropriate for the entire review group, you should use the question bubble on the item line. Your comments/questions will appear on everyone's Update page. Using the @ before names will tag them and allows for more direct notification that there are new comments/activity on a request item.
b. If you have a question for a particular reviewer, you can click the comment bubble on their reviewer line and shoot them a message. This will appear in their updates tab. Use the @ to create a direct mention and this will alert them that there is an updated.



When you have finished reviewing the proposal, you have three options for **Reviewer Decision** input. You will mark your decision under the Reviewer Decision column on your review line.

a. Accept – you are good to go with the proposal. This may happen right away, or after back and forth clarification.
b. Needs Clarification – use this if you have reviewed, but have questions that need follow up. Once clarification is received, you can then Accept or Deny the request.
c. Deny – a request that you do not support, including those for which clarification was provided.

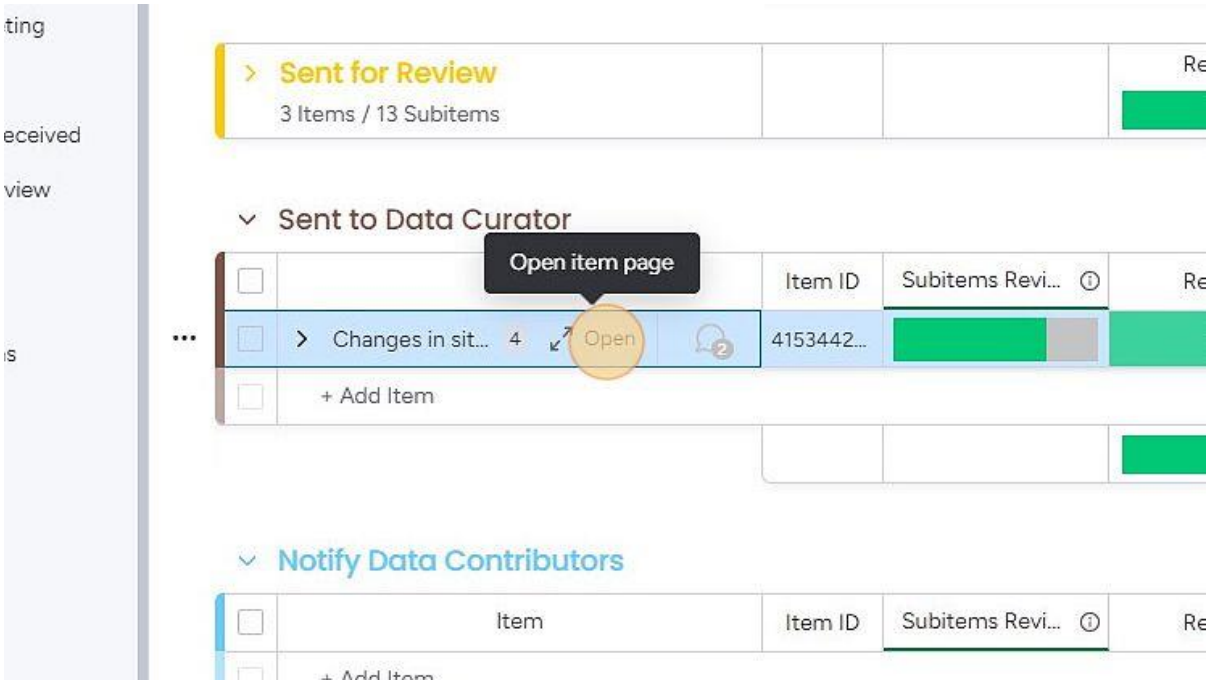


NEW You no longer need to click "DONE" via the status column once you Accept/Deny. An automation has not been set up to take care of this. ~~Once you have either Accepted or Denied the request, you should mark your review as **DONE** via the Status column on your review line.~~

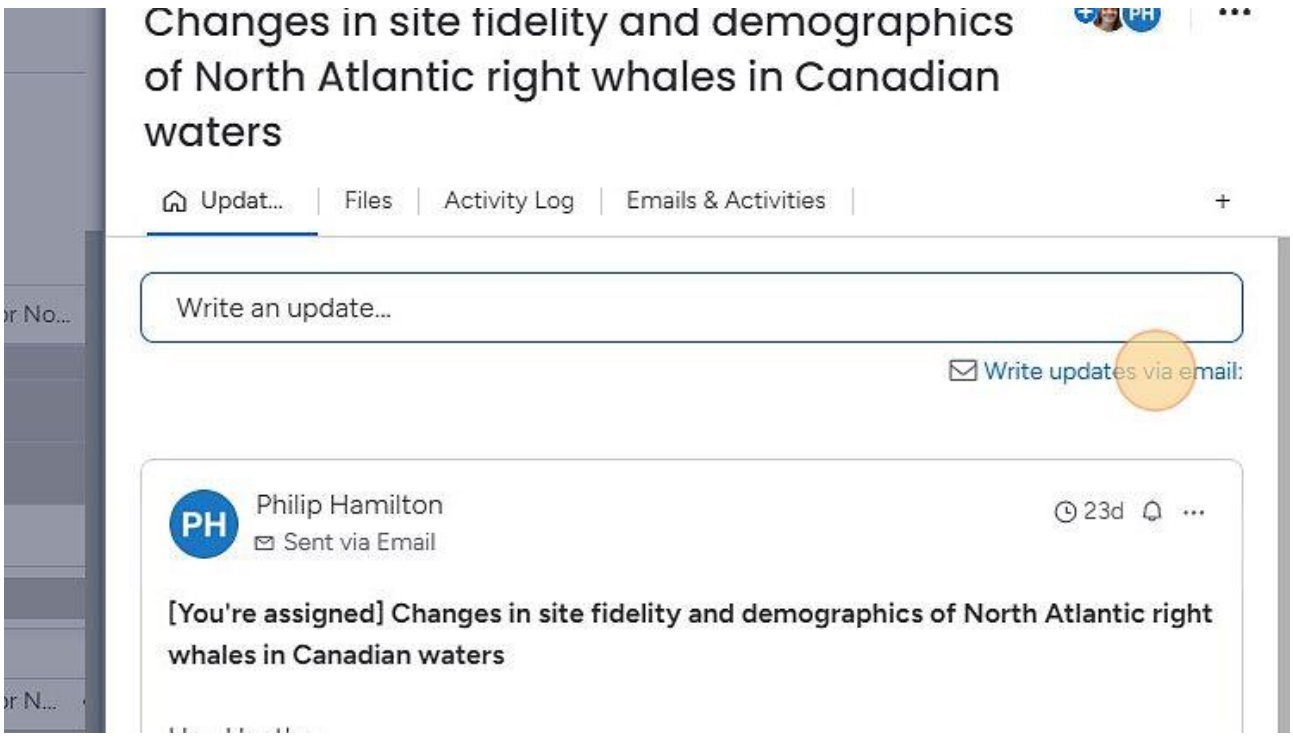
Data Curators

Once all reviewers have completed their review, a NARWC Admin will notify the requester and the access request item will move to the **Sent to Data Curator** group and the appropriate data curator(s) will be notified.

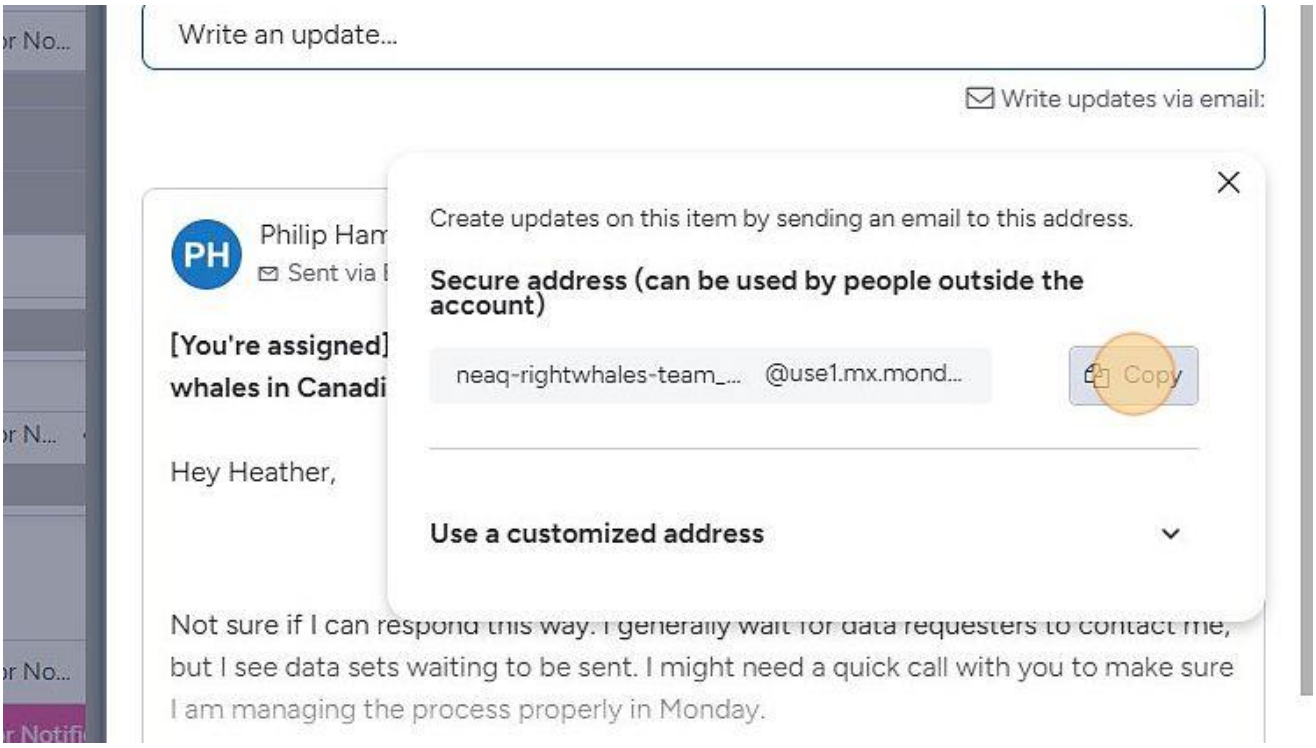
1. When you are ready to send data to the PI, click on the double arrow next to the request item and open the item page.



2. Click on “Write updates via email”

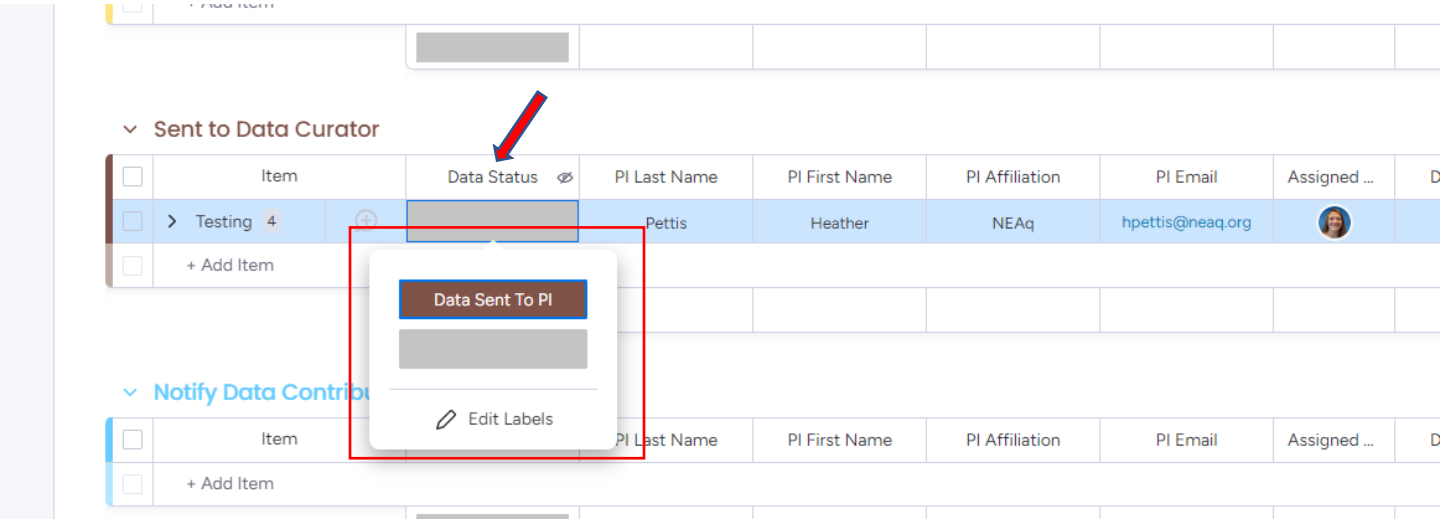


3. Copy the email address for this item



4. Write email from your normal email account and cc the copied item email. That will create an update with the email that you send. You can attach and/or link the data in that email and it will attach to the item update.

Once data have been sent, please change the status column **Data Status** to "Data sent to PI." This column has a restricted view so that only Data Curator(s) can see it. If you are a Data Curator on a particular request and can't see the column, please contact the Exec. Admin.



When you mark a request as "Data Sent to PI" the item will automatically move to a post-review board where we will track contributor notification and reporting deadlines. The Board is only visible to Admins and Data Curators.

Data Access Requester

As data reviewers (and likely data requesters at some point) it will be helpful for you to understand the process from the requester perspective.

When a PI submits a data access request, they will receive an email with a bit of information on the review process as well as a link to their access request. Including will be all of the information they submitted, as well as the following:

1. Request Status – this will allow the PI to check on the status of their request at any time by clicking the link.
2. Reporting deadlines – once the request is approved, a report deadline date will auto populate.
3. Link to update modified request if necessary. Occasionally (becoming more frequent lately) there are clarification needs for requests and PIs can directly upload modified requests to their original request. This will automatically upload the modified request to the original request line item, making it visible to reviewers.
4. Upload link for report. Once the data access completion data has passed, PIs have 6 months to submit a report. They will receive auto-reminders leading up to the deadline and the linked form will have an upload button so that the report can be pulled into the original request line item.

Once a request has gone through the review process and has been approved, the PI is notified and the request is moved to the appropriate Data Curator(s). When data has been transferred the request will be considered completed for review and will be moved to the Open Request Group where it will live until the request timeframe is complete. At that point, it will be moved to the Reporting Period Group, where it will live until a report has been received.

Data Access Coordinator

1. When a request comes in, it will populate the received group as indicated above. You should go through the submission to make sure everything has been included and read through the proposal making sure that all of the necessary elements are included. Important things to look for:
    a. Is the appropriate database being requested? For example, if the request is for the Sightings Database, but the requester is asking for life history data, that is a data/database mismatch.
    b. Is there an appropriate timeframe and spatial outline for the request?
    c. Does the requested data make sense in context of the project?

d. We don't do wholesale downloads of the data. Requestors need to identify specific data fields they are looking to obtain. They should reference the Sightings Database User's Manual HERE and/or ask questions about available data in each database.

2. Sometimes the requester never responds to clarification questions or communication ceases before the request goes to review. Right now, those are kept in the Incoming Requests Group. Once we have some protocols on when those will expire, I will write those up. We will change the Request Status to "Incomplete" which will move them to the "Incomplete Request" Group.

3. Once all clarifications are taken care of, you should change the Review Status to "**To Review**." That will move the request down to the "**Sent for Review**" group and will automatically create just a curator line (if it's a management request only) or a curator and three reviewer lines.

4. Set all of the date columns of those reviewer lines to the current date. This needs to be done BEFORE assigning reviewers in order for the review deadline automation to work properly.

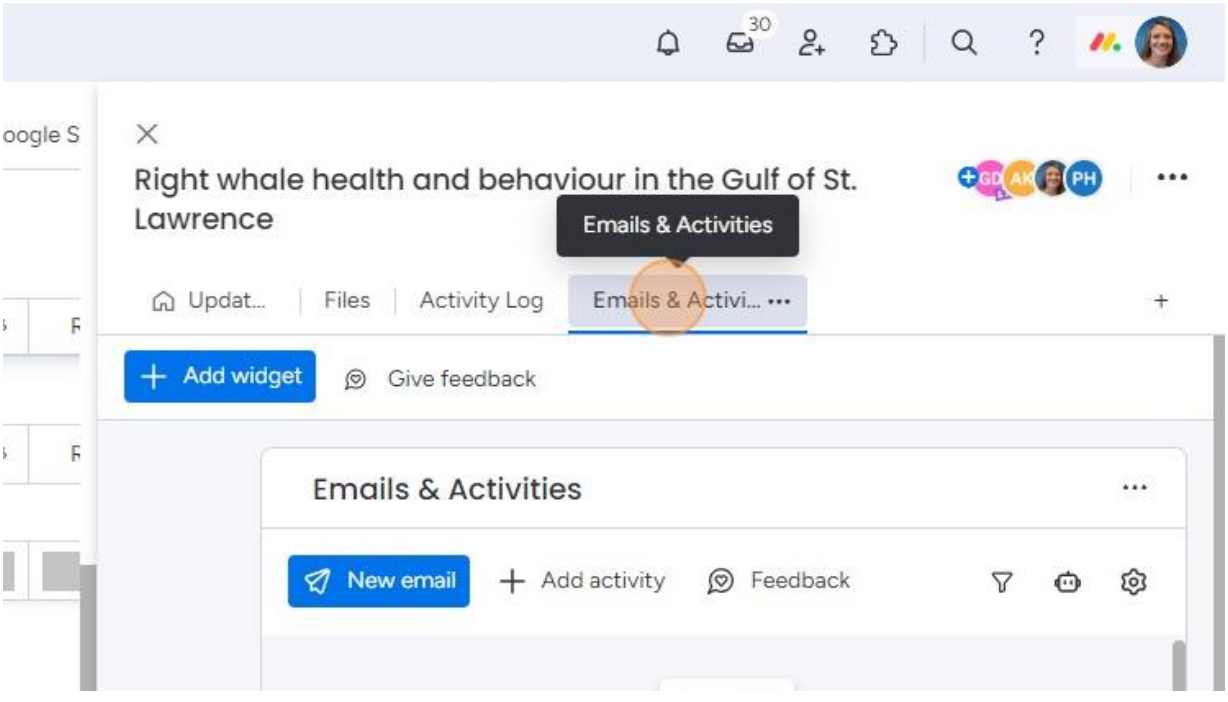
5. Assign reviewers by clicking on the little circle head under "Owner" The Database curator will auto populate with Bob and or Philip if the request is for the Sightings Database and/or the ID Database. If the requested data is from another database, you will need to assign a new curator line. I am working on automations to take care of this now – but the other major databases would be Anthro (Amy), VHA (Heather), Mortality (Sarah Sharp), and eventually WhaleMap (Heather, Hansen, or Kate).

6. If there are any clarifications that are important for the reviewers to know, enter those as an update for the item.

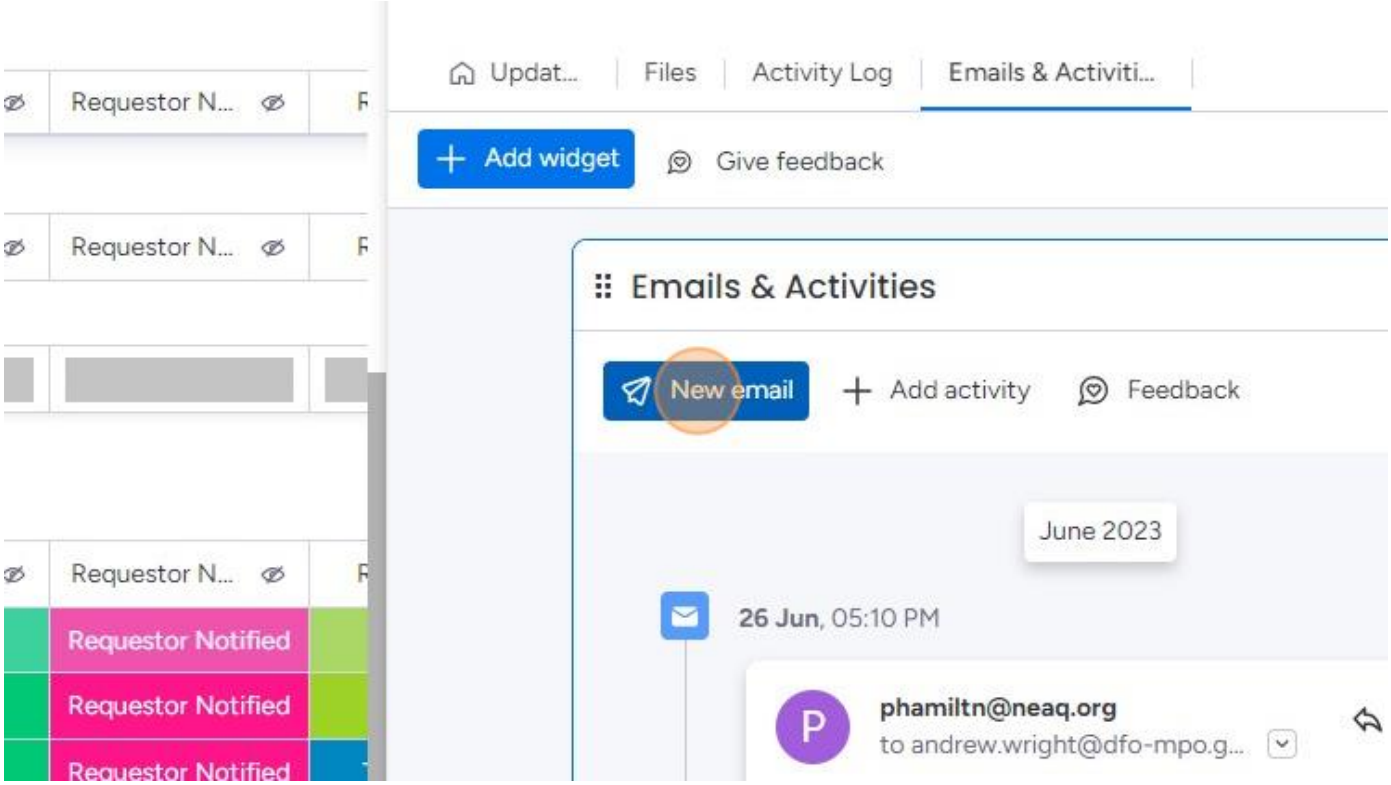
7. Reviewers have 30 days to review. If there are Qs that come up, reviewers will flag those either in the item update in their own review line. There may be some back and forth with the requestor – make sure that you copy the email in the Update tab (click on "write updates by email" and then cc that in your email to the requester. You can use the Email and Activities tab – it's linked to the NARWC gmail account.

8. Once reviews are done and the request has been accepted, you will notify the PI. Copy the items email link from the update tab.

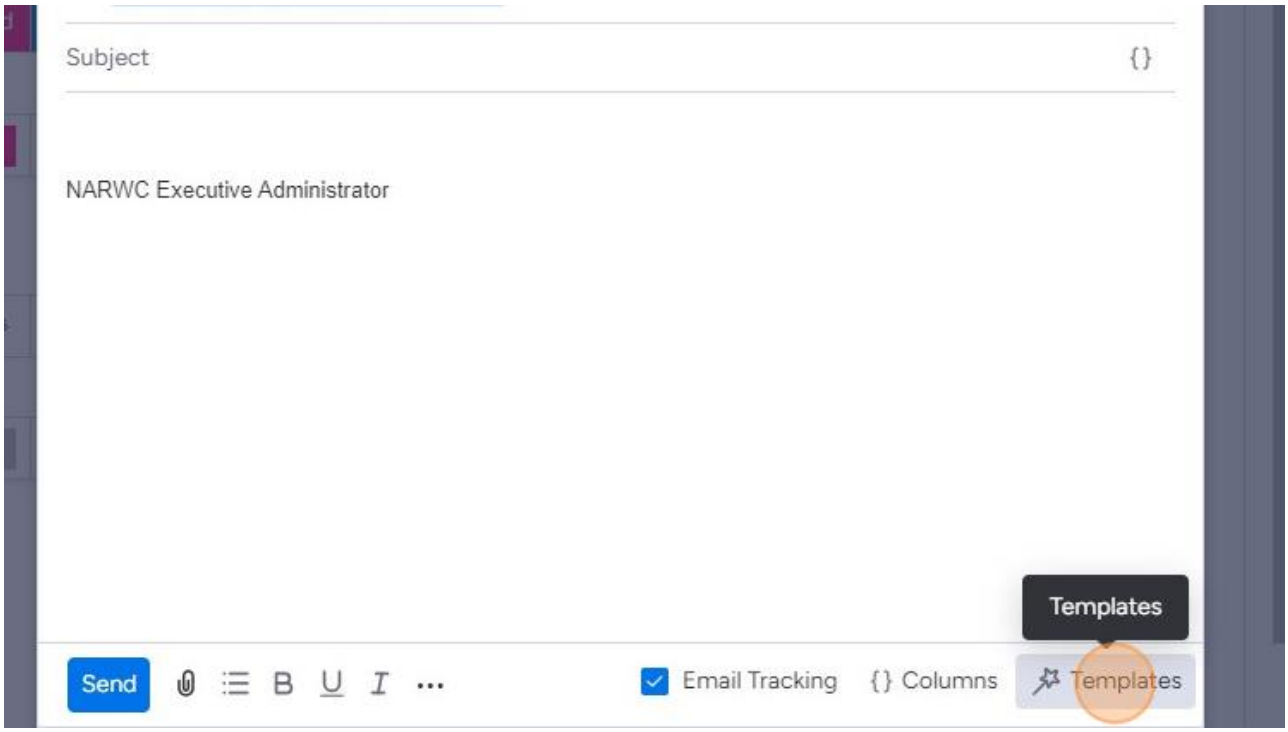
9. Go to Email and Activities.



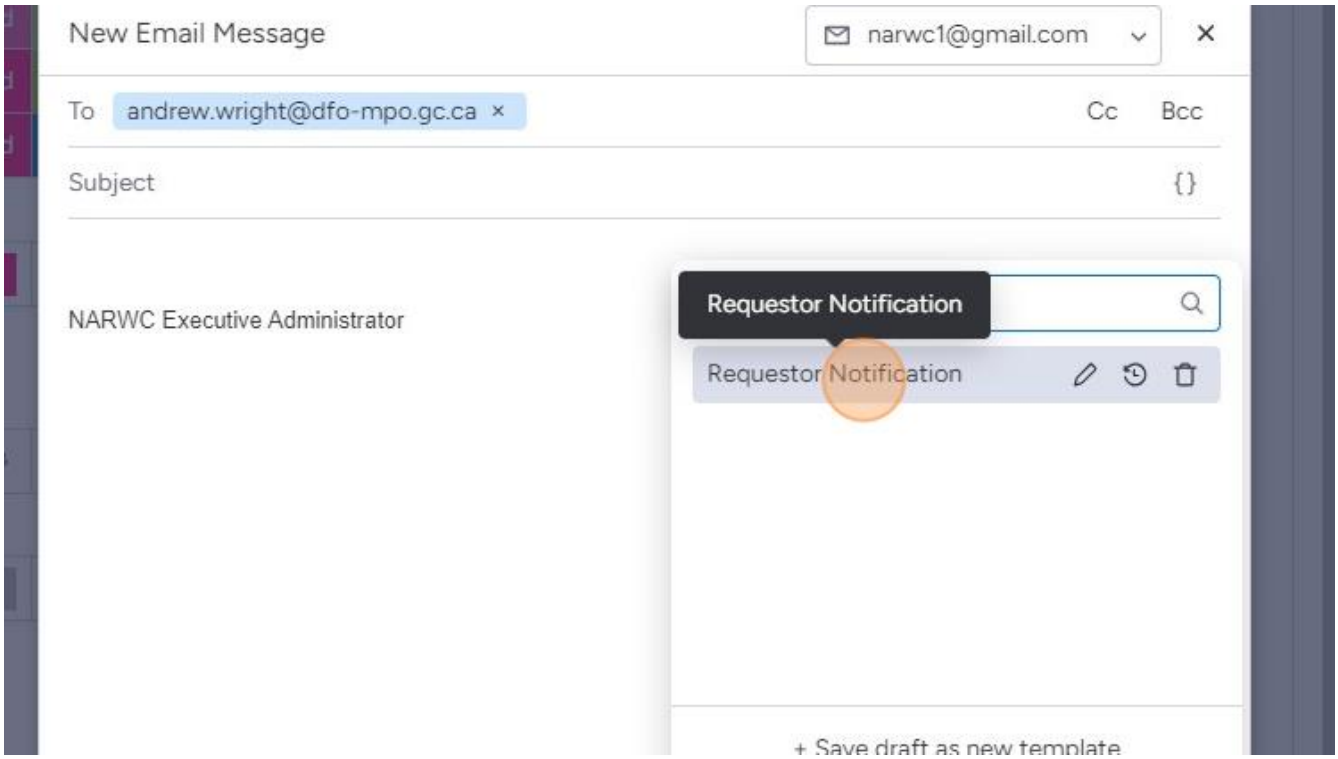
10. Click “New Email”



11. Click on template.

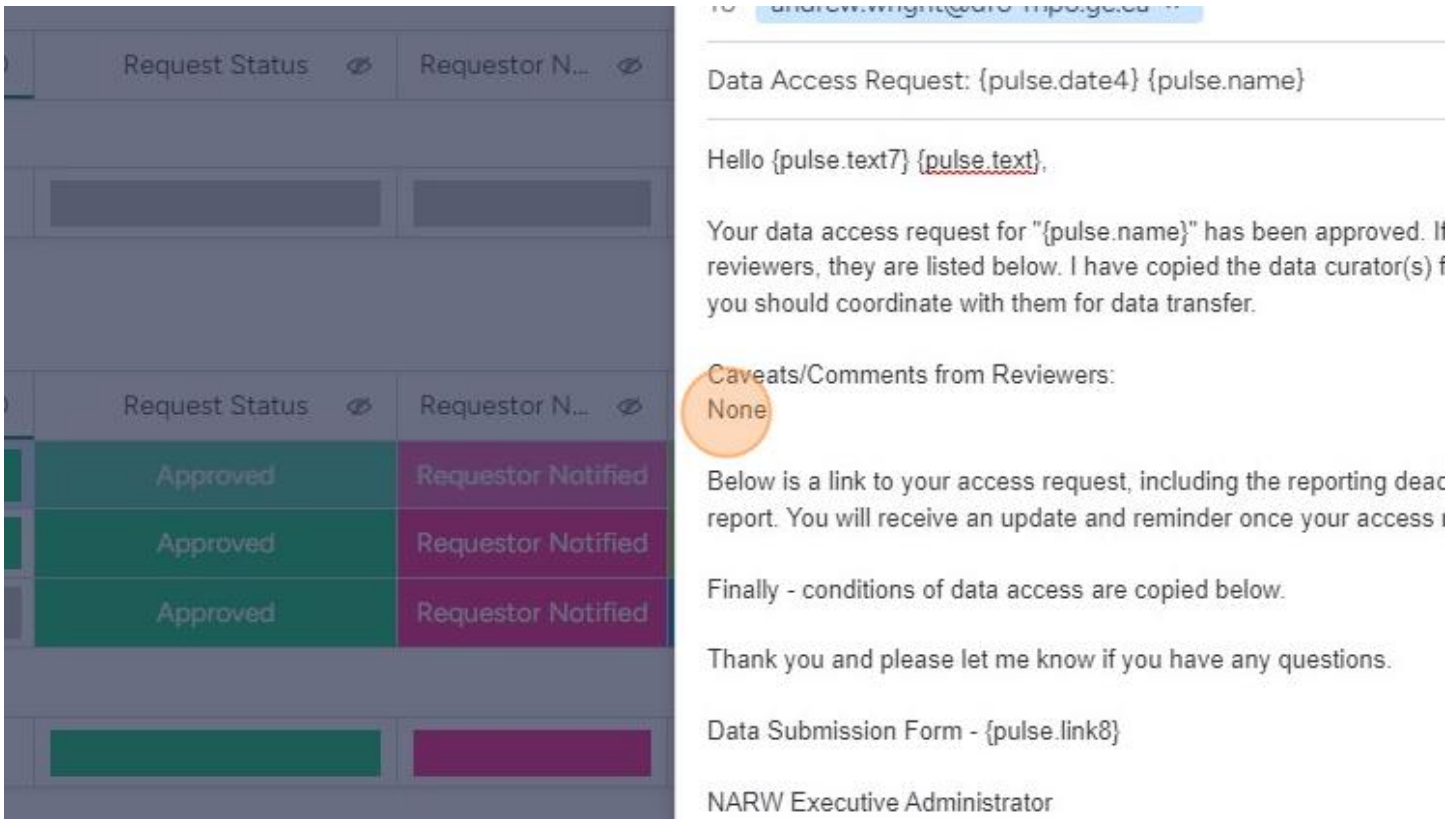


12. Select “Requester Notification”



13. This will auto create the email body with pre-set fields. You should paste in the item’s email (see above re: from where to copy that email),the emails for the Data Curators for the request, and any other PI/Requester email that was submitted with the request.

14. If there are clarifications/caveats/etc to pass along from the reviewers, list them under “Caveats/Comments from Reviewers.” Often times these are caveats about the data, suggestions for additional coauthors, etc.



15. Send the email.
16. Once the email is sent, you should change the “Requestor Notified” Status to Requestor Notified. Once that happens, the request will automatically kick down to the “Sent to Data Curator” Group and those folks will be notified.
17. Once they have sent data to the PI and have marked the request as such, the request will automatically move to a new Board called NAWRC Data Access Post Review.
18. Right now they are all hanging out in the “Notify Data Contributors” group because we are still working through that process.
19. Once Data Contributors have been notified, the request will move to the group “Open Request” where they will hang out until the access date ends. When that date arrives, an email is automatically sent letting them know about the end date and reporting deadlines.
20. MORE TO COME ONCE REPORTING PROCEDURES ARE SET!

Coming Soon!
Notify Data Contributors
Completed Reviews (Open Requests)
Reporting Period
Closed Requests