To create a collaborative brainstorming space I’ve taken the chapter headers out of the Fay Lab’s lab manual to use as a general outline for discussion around lab practices and standards. Many of these might not be directly transferable to our purposes, please comment/edit and remove content as desired.

Team Assignments for writing chapters (color code?):

Lindsay: onboarding offboarding (help from Amanda and Zach)

Adam: Work protocols (Github help from Mackenzie)

Miguel: Work protocols for Box

Andrew:

Matt: Work protocols (Box, How we store things)

Kathy: Lab culture and code of conduct?

Lisa: Lab culture and code of conduct

Zach: Onboarding/offboarding + Github

Jerelle: Work protocols

Amanda:Onboarding/offboarding

Jamie (intranet and communications?)

Mackenzie: Work protocols

Github Repo Link:  https://github.com/gulfofmaine/Tidal\_Exchanges

1. Work protocols
   1. Meetings
      1. General expectations are to attend All Staff and Research Staff meetings and each of the retreats. Meeting minutes and zoom recordings can be obtained from the meeting contact person.
      2. All Staff meetings occur biweekly at noon. They contain organization wide updates, department updates and presentations, and other important information. Calls for updates and meeting agendas are sent out prior to the meetings. Contact person for All Staff meetings: Beth Lively (blively@gmri.org)
      3. Retreats occur three times a year. The retreat may be a working or fun retreat where the outcome of the day or half day may be an organization-wide advancement in an idea or increasing group cohesion.
      4. Research Staff meetings occur biweekly, on the opposite week to the All Staff meeting. Research Staff meetings contain updates and information relevant to the research team. Calls for updates and meeting agendas are sent out prior to the meetings. Contact person for Research Staff meeting: Will Brewer (gmriresearchmanagement[@gmri.org](mailto:wbrewer@gmri.org))
      5. Lab meetings are set by the PI and may occur weekly or biweekly. These meetings contain lab-wide updates, information, and presentations.
      6. Project specific meetings may occur in addition to lab meetings and be focused on a particular project. These meetings may occur at irregular intervals or on an as-needed basis.
      7. One-on-one meetings are set by the PI and may occur weekly or biweekly.

Project Management

Project management involves managing multiple elements and stages of a project, including cultivating the project team, sustaining communication, planning and tracking work, managing and tracking the budget, ensuring GMRI and sponsor protocols are followed, and reporting.  Project management is typically overseen by the PI, with lab members playing increasing roles in overall project management as their time in the lab increases. All lab members will be asked to support discrete elements of project management for the projects they are working on.  Postdocs and senior research associates may ultimately be asked to manage full projects that are closely tied to their research.

Project team: Each project typically has full team meetings, including with external collaborators, on a biweekly to quarterly basis.  Sub-teams, particularly within GMRI, typically meet on a more frequent basis.  Communication within sub-teams and across the full project team is sustained via email, Slack, Github, and in-person conversations as needed between scheduled meetings.  Ongoing communication to achieve progress and efficiency in project activities is essential and is expected of all team members.

Tracking work:  Procedures for tracking project activities vary among projects.  Work plans are developed between the PI and personnel contributing to the project, and these are then aligned with full project work plans.  Progress is tracked through 1:1 meetings of the PI and project personnel and through sub-team and team communications.  Project planning or tracking software (e.g., Github, Trello, Asana) may be used for certain projects.

Budget:  The Research Management team supports budget tracking for all projects by maintaining accounts, access to spreadsheets and balances, and facilitating analyses of projected spending.  The PI is ultimately responsible for ensuring expenditures are valid and that use of the budget remains aligned with work progress.  Senior lab members may assume responsibility for tracking a project budget, and part of this responsibility entails keeping the PI informed of budget status, questions, or concerns.

Reporting:  It is ultimately the responsibility of the PI to ensure that progress updates, annual reports, and final reports are submitted to the funding body in a timely manner.  The Research Management team helps track reporting timelines to support this role.  Lab members working on a project are expected to contribute content for reports that reflects project activities, progress, accomplishments, and challenges.  Report submission details are specific to each project, but generally reports are submitted by or in coordination with Research Management.

Communication platforms

Email - We use microsoft outlook as our primary email service. You can sign-in using a web browser or the outlook app, but the former has more functionality. Email is used for internal/external communication and is commonly used for more formal communications and/or messages that require follow up. There are no GMRI protocols around sending emails outside of work-day hours. GMRI has also not set specific expectations around responding to emails within a certain amount of time, but it is common to be respectful of working hours when possible. No protocols exist around If you send/receive emails during off-hours or weekends and expectations about responding to them.

Calendars – The primary scheduling tool used by GMRI is outlook calendars. Calendars are used to plan and organize meetings with others. Calendar availability is viewable by other GMRI team members, so please make an effort to keep calendars current. When looking at other people’s calendars, it should not be assumed that their calendar is complete and current. Outlook calendars are also used when reserving meeting spaces within the building, and can be used to check their availability.

Slack - We use slack for more informal communication. The GMRI workspace is primarily used for internal communications, but its utility is still being explored for external communication. Various channels have been created covering different topics, these may be open to anyone or locked for specific access, there are no expectations to join channels. No formal expectations around slack usage, but it is becoming an increasingly large part of communications.…not required to have slack open all-day but should check-in daily? Often people will send things in slack and email at same time, should that be a thing?  When working externally there is the option to invite others into the GMRI workspace, or alternatively create a new workspace for collaborating with a specific group.

^ Revisit, growing pains

Zoom - Used for virtual meetings internally and externally. Typically zoom meetings will be scheduled via outlook and zoom links provided in outlook. GMRI has a couple zoom accounts. For a bit we tried to have hourly meetings shortened to 50 minutes and half-hour meetings shortened to 25 minutes to allow time between meetings. I don’t think people are still doing this. You don’t need to show your video if you don’t want to. We try to stay muted if you aren’t currently speaking.

**GitHub Expectations**

GitHub is our code version control tool of choice. GitHub keeps track of changes that are made, who made those changes, and allows you to look back at and/or revert to prior versions as needed. This is a powerful tool if you need to share code with others or develop code collaboratively with multiple contributors. GitHub repositories are generally project-specific and should each contain a README file to briefly describe the contents of the repository, see the section on Box for a recommended template. The following describes how we typically use GitHub but will likely not cover all possible uses.

**GitHub Organization**

Sharing Code

1. Code can be stored in a personal GitHub account and edit permission can be granted so collaborators can see and edit code.
2. For collaborative projects a repository may be owned by another contributor or by a GMRI account (e.g. Kathy, Lisa, or the GMRI organization owns the repository). Contributors must request access if the repository is private and then may choose to contribute changes by creating a branch or by forking the code to their own GitHub account.
3. Repositories that are actively being developed are most often private repositories with edit permission granted to collaborators. Once work is complete it is good to make repositories public unless confidentiality reasons prohibit public sharing.
   1. If a repository can not be made public, ensure a copy of your code is stored on Box so that your code is accessible to other members of the research team without needing to request access to your private repository. This step might not be necessary if the repository is owned by a GMRI account (e.g. Kathy, Lisa, or the GMRI organization owns the repository)
   2. Repositories owned by individuals may also be forked to an institutional account when work is complete to maintain a copy that is accessible through the institution
   3. DO NOT store confidential data on GitHub, it will prevent you from making a repository public in the future and GitHub does not handle large data files well
4. Repositories that are no longer being actively developed and/or have products that need to be shared publicly (e.g. R packages, code snippets) should be shared in public repositories whenever possible

Project Management

1. GitHub has several features that are useful for project management that we often use, but use may vary across projects.
2. **GitHub projects** can be used like a Kanban board to keep track of the status of different research steps.
3. **GitHub issues** can be used to keep development notes to keep collaborators in the loop about ongoing challenges and ask questions.
   1. Collaborators can be assigned to issues to help answer questions and solicit feedback on specific challenges.
   2. Issues may also be assigned to projects and will subsequently appear as notes in the corresponding GitHub project board
   3. Sections of code can be linked to or directly copied into issues by clicking on a line number in GitHub, clicking on the ‘...’ icon that pops up to the left of the highlighted line number, and selecting the ‘Reference in new issue’ option.
4. DO NOT USE GitHub TO STORE DATA
   1. GitHub does not store large datasets well
   2. Small datasets may be shared but should NOT be confidential data (this will prevent you from making repositories public in the future)
      1. Consider using Box or GoogleDrive to share data
5. **Wiki**
   1. Additional documentation can be added to a GitHub repository via a Wiki, this is often useful to document publicly shared tools when a README file is not extensive enough (e.g. add a user manual for an R package)
6. Other best practices
   1. Recommended file structure
      1. Include a README file to describe the contents of the repository and any data it depends on (may be external data not housed on GitHub)
      2. Data folder
         1. Only small datasets that are NOT confidential
         2. We store large data files in Box
      3. Functions/scripts folder to contain custom functions and code scripts
      4. Documentation folder
         1. Files that describe repository structure, methods, and use.
         2. Describe actively developed branches to keep track of different features being developed
      5. Parameter folder (if applicable)
   2. When starting new or joining existing projects, be sure to discuss the preferred process to merge changes into master branch with collaborators to establish clear expectations.

**Box Expectations**

Box is a cloud storage platform for storing data and other materials that can be accessed by anyone with shared access to that folder from any device. Box folders can be set as invite only, becoming visible to others when permission is shared. For this reason your view of the box will be different from other people or collaborators. It is recommended when working with external collaborators to use google drive as a collaborative platform over box.

Folders on Box should contain a README.txt file to provide proper orientation to its contents. This is a short document detailing some key elements about the folder. An example template can be found on Box in the RES\_Data Folder - [template](https://gmri.app.box.com/file/886421941519?s=vpiv4dokkunzg1uq2bkloeo5mdmyicm7)

**Working on Box**

Box has functionality to autosave files when working through browser extensions: (word online, google sheets, etc.). For situations where there is a preference to edit outside of the browser there a number of options:

* Locking the file: locking a file on box while editing allows you to edit on your personal computer and prevent others from accessing/editing the copy on box until it is unlocked
* Work in private locations: If you wish to prevent problems arising from people accessing the same file simultaneously it may make sense to place it in a folder that has limited access or visibility to others
* Keep your code off box: If there is any likelihood that you will be working on code with other people it makes more sense to use the functionalities of tools like github/gitlab

**Box Organization**

Data and materials stored on Box are generally stored and organized based on their purposes: Lab\_folders and projects , General resources for sharing across the organization (RES\_Data), Admin Documents, & files for personal use (personal folder on Box).

Lab\_Folder/Projects Contents:

* README - A file containing a description of the folder and file structure for the project, necessary metadata, notes, and links
* Code - The finalized codebase needed to recreate the results of a project should can be stored here to maintain a record of what was needed for the project. This is usually stored elsewhere and backed up via github, but it may be advantageous to place a copy here for reproducibility
* Data - the relevant data needed for a project should be kept in associated project folder
  + Raw - how the original data was recorded and/or received. This is an archive of the starting point for the project and should allow for full recreation of the project’s results
  + Prepared - any derivative data that has been edited/augmented/altered to serve some purpose in the project
* Manuscript - track changes documents
* Final docs - cover letters, abstracts, manuscript, reference documents
* Final figs and tables - hi-res images of figures submitted as part of manuscripts or for use in presentations
* Literature
  + UMaine library access (Jeff/Walt): <https://library.umaine.edu/>

runge - 25022005094045

golet -  25022001832893

* Project related papers cited in proposal
* Naming convention suggestion: Lastname\_JournalAbbreviation\_Year.pdf
* Use reference management software you like
* Presentations - powerpoints
* Reports
* Old - stuff that makes you anxious if deleted
* Temporary results - figures, tables, Rmarkdown

RES\_Data/ Contents:

* Subfolders based on resource topics or resource types ex. OISST Data & Shapefiles
* These should contain:
  + A README indicating what the contents are and who the contact is
  + Data/resources that are relevant across projects
  + The final or shareable form of these resources

Admin Document Folder Contents:

* Proposals
* Reports
* Logistics
  + Travel, budget, etc.
* Presentations
  + GMRI powerpoint templates located intranet

Personal Folders Contain:

* Things you may want backed up
* Files/resources that are personally helpful

**Google Drive Expectations:**

Google Drive is a cloud file-storage system similar to Box. It is often used as a secondary resource to Box based on organizational history. It offers much of the same functionality as Box, and because of that many recommendations and best-practices carry over. We recommend working within Google Drive over Box when there is a need to collaborate externally with partners, or for cases when people are editing the same document simultaneously.

**Reasons to Use Google Drive:**

Sharing documents with external groups and individuals without wanting to share access to full directories.

**Google Drive Organization:**

Because google drive does not have the organization-wide adoption levels that Box has, the organization structure of drive is less well-defined. With any project it is always a good practice to document things so that in the future you and anybody else that may engage with the work is able to find and work with the correct files.

END lab manual outline

Things we need to work through:

* Github best practices – High-level understanding
* App support
* Data Hosting Options and ERDDAP
* Troubleshooting Resources

External Project Organization:

1. Server use and Web Applications:
   1. A number of projects at GMRI have led to the creation and support of web application tools like the Mariners dashboard and shiny applications. These have been supported through a variety of in-house and cloud hosting strategies. The former is typically coordinated with the help of the Ocean Data Products Team, and the latter is typically set up using ShinyApps.io hosting plans. The determination of which platform suites the project is something that should be discussed during project planning.
      1. ERDDAP & Data Hosting
2. Oh no, things blew up! Who had this problem before
3. Comments: Desire to simplify, not replicate folders/files, or hide things all over. Need clarity on where to archive code/data
   1. I think we are doing a whole lot of good things right now with sharing knowledge and code. I guess I still feel like there are opportunities to integrate the knowledge and code to maximize our efficiency, the impact of our work, and get to whatever that “next” best thing is. Using myself as an example and thinking about Miguel’s simulation work. Kathy and I have done some simulation work using a different, but somewhat related, R package to the one Miguel will be using. Although I tried to write things in specific functions that could be easily used by others, it would take me a while to actually share these things with Miguel and even longer I’m sure for him to be able to use them in the simulation work he is doing. I think this happens a lot: other examples, I know Lindsay has code to produce some awesome graphics that summarize species distribution/abundance. So, I can go and use that code (copy-paste it) and adapt it to the data I am working with. That’s a huge advancement from where we were. I think I’d challenge us to go the next step where instead of grabbing/adapting the code, all I would do is run a function created to work with these types of data that has a fairly standard format (lat, long, time, value).
4. Things we want to stop doing: generic file names? survdat\_final\_jk.Rdata
5. How we store things
   1. Where - wants: A succinct but thorough document describing the location of shared datasets, shapefiles, etc (like a treasure map of fisheries data). This would live as a README in the RES\_Data folder (or other highest order folder)
   2. Labeling/metadata - wants: Lab-wide naming conventions for Box folders, etc
   3. Folder structure
      1. Literature (since we have a sort-of-weird way of downloading papers i.e., stealing Walt’s Umaine login) - wants: Centralized literature storage location... I tried to implement a group library on Mendeley, but only I use it ;)
   4. Do we want people closest to projects to act as resource managers? Ex. Andrew maintains the most current trawl data and documentation
6. How we work
   1. Coding Practices- link to tutorials for new people?
      1. Rmarkdown documents for sharing temp results
      2. R projects
      3. Annotating code
   2. Pull request (PR) etiquette
   3. Code review etiquette
7. Where we work
   1. Slack communities/channels
   2. Online Publishing
8. Lab culture

1. Code of conduct

GMRI has a long-standing policy and commitment to providing equal access and opportunities in all terms, conditions, processes and benefits of employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, or veteran status. For additional detail and resources on this institutional policy see: LINK

1. Lab expectations (sources: Pinsky lab manual, Fay lab manual)
   1. **Be respectful:** We expect staff to maintain a professional work environment. Be respectful in all interactions and communications, especially when debating the merits of different options. Be constructive and positive.
   2. **Be inclusive:**
   3. **Get informed:** Educate yourself about equity, diversity and inclusion in STEM and beyond.
   4. **Be collaborative:** We work to build a collaborative and interactive research team. .
   5. **Share early and often:**
   6. **Give credit, take responsibility:** Celebrate success, in yourself and the community. If you see a problem, be forthcoming and try to find a solution If you make a mistake, be honest and open.
   7. **Problem solve, but seek help when needed:** Don’t be afraid to ask for help, and offer help generously. We are a team: our colleagues are our resources, and you are a resource for our community.
   8. **Communication:** Don’t to be afraid to share your thoughts and opinions. Be respectful and open-minded when others share
   9. **Take initiative**: Make an effort to suggest improvements to lab culture and work protocols.
2. Project Start-up
   1. What platforms will be used and how?
   2. Review roles and responsibilities
   3. Budget and time allocation
   4. Authorship guidelines (see rubric for further discussion)
3. Proposals
   1. Opportunities to contribute and author proposals  should be discussed with your supervisor before pursuing.
   2. Lab members may be asked to contribute to proposal writing.
   3. Postdocs may have the opportunity to lead proposals and will likely be expected to play a major role in securing subsequent funding beyond their initial appointment.
4. Institutional collaboration and requests
   1. Communicate with supervisor
5. Pet peeves (if any)

1. Onboarding

|  |  |
| --- | --- |
| **# Onboarding** |  |
|  |  |
|  | Here are a few items to take care of when you join the lab! |
|  |  |
|  | **## To Do List** |
|  |  |
|  | General GMRI onboarding |
|  |  |
|  | - Complete the "Gulf of Maine Research Institute Employee Orientation Checklist" |
|  | - Get a copy from your supervisor |
|  | - Covers general onboarding, building access, computer setup, HR, ect. |
|  | - Talk to HR for initial paperwork, benefits, access to Paylocity, ect. |
|  | - Contact at: hr@gmri.org |
|  | - Talk to help desk to get access to: |
|  | -  Building |
|  | -  Parking pass |
|  | -  Wifi |
|  | -  Computers/tech you need for your research |
|  | -  Contact at: help@gmri.org |
|  |  |
|  | Lab onboarding |
|  |  |
|  | - Read through Lab Manual |
|  | - Make a GitHub account if you don't have one already |
|  | - Make sure you have access permission to folders on Box |
|  | -  ResData contains shared data and files that you may need access to, but there may be other lab- or project-specific folders you will need to be added to |
|  | - Once the above is complete, check that you have access to: |
|  | - Okta - GMRI's single sign-on |
|  | - Paylocity - HR documents |
|  | - Outlook - email |
|  | - Zoom - web conferencing |
|  | - Slack - team messaging |
|  | - Box - cloud storage |
|  | - GMRI Intranet - HR and other general information |
|  | - Also check that you have been added to staff list on GMRI website |
|  | - Recommended slack channels |
|  | - benefitspopcorn |
|  | - general |
|  | - random |
|  | - gmri-research-team   - lab specific slack channel, e.g. fisheries-lab |
|  | - Email listserves to be on |
|  | - GMRIStaff |
|  | - Meetings to know about: ALL |
|  | - Bi-weekly all staff meetings (Mondays) |
|  | - Bi-weekly research staff meetings (Mondays) |
|  | - Tidal exchange meetings - joint meetings about open data science |
|  | - Meetings to know about: Lisa's lab |
|  | - Bi-weekly lab meetings (Thursdays) |
|  | - Individual meetings on alternating week from lab meeting |
|  | - Meetings to know about: Kathy's lab |
|  | - |
|  | - Other useful knowledge |
|  | - During COVID times the back door has a doorbell if you need to be let in during business hours  \*\*\*Traditional lab space and doing physical lab work\*\*\*  -Lab Safety orientation from lab safety officer/research representative from the Safety Committee (currently Zach Whitener): including general lab rules, chemical safety orientation, where to find/read SDS documents, eye wash stations and use, chemical shower location and use, oxygen tank; typical and atypical odors and sounds in the lab spaces (e.g., drying fish vs. broken freezer, floor drain sewage smell, fumehood alarm, freezer alarms, etc.)  -Lab work orientation: chemical storage/use of fume hoods/drying ovens, lab cleaning protocols, otolith processing equipment orientation; hand tools, embedding chemicals, microscopes, micromill, hot plates, saws  -Otolith storage protocols, both for whole and sections  -Orientation/access to wet storage, dry storage, gear trailer (lock combination 1968), float access and policy (policy on Intranet, lock combination 8862), Coast Guard access (combination changes regularly, get updates from Zach Whitener or Tim Reich)  -Orientation to vessel safety policies from Vessel Safety Officer (Zach Whitener), policies available on intranet |
|  |  |
|  |  |
|  |  |
|  |  |
|  | **### Communication** |
|  |  |
|  | **#### HR support** |
|  |  |
|  | - hr@gmri.org email for HR support |
|  | - Bobbi-Jo Hutchins is the Payroll and Benefits Specialist. She is a great resource for HR related questions. She can be contacted at hr@gmri.org, bhutchins@gmri.org, (207) 228-1643, or on slack. |
|  | - Bobbi has office hours every Monday-Thursday from 1-2pm. Zoom link for office hours is https://gmri-org.zoom.us/j/91304989626?pwd=VUJweU8vSkhKV21XQVkyMkNOaHMyZz09 |
|  | (Office hours info last updated on 10/25/21) |
|  | - Joining the #Benefitspopcorn on Slack is a good resource |
|  | - Paylocity and the GMRI Intranet also have HR relation information |
|  |  |
|  | **####  IT support** |
|  |  |
|  | - Tim Reich or Nick Georghiou. Questions or formal help requests can be directed to help@gmri.org, or smaller/quicker questions by contacting Tim or Nick on slack. |
|  |  |
|  | **### GMRI resources** |
|  |  |
|  | **#### Intranet** |
|  |  |
|  | - GMRI’s Intranet is a website managed through sharepoint in which the purpose is to work towards the strategic plan goal of “investing in technology that empowers staff with skills and tools for innovation, collaboration, and efficiency”. |
|  | - GMRI’s Intranet is a central location for GMRI internal information. |
|  | - Ways to access the Intranet include: |
|  | - This link: https://gmri365.sharepoint.com/sites/GMRIHome |
|  | - From office365, clicking on the app launcher in the top left hand corner, clicking “all apps”, then scrolling down to the “GMRI Intranet” tab. |
|  | - GMRI Intranet has information on: |
|  | - Previously recorded staff meeting presentations |
|  | - GMRI interactive phone list |
|  | - Staff events |
|  | - Benefit documents |
|  | - GMRI policies |
|  | - Resources for hiring managers |
|  | - IT documentation |
|  | - Application cheat sheets and tips |
|  | - Forms you may need to fill out |
|  | - Web links to Paylocity, Zoom (specific room zoom links), benefit portal links |
|  | - Has search engine for fast and effective search |

1. Offboarding
   1. Offboarding policies
   2. Documentation of work
   3. Access to resources -  it would be nice to get some clarity on policies for allowing people access to the GMRI GitHub organization (or not) after their departure
   4. Exit interview process?
2. Funding
   1. Project timeline communication
   2. Proposals
3. Communication
   1. Lab hierarchy
   2. HR support
      1. [hr@gmri.org](mailto:hr@gmri.org) email for HR support
      2. Bobbi-Jo Hutchins is the Payroll and Benefits Specialist. She is a great resource for HR related questions. She can be contacted at [hr@gmri.org](mailto:hr@gmri.org), [bhutchins@gmri.org](mailto:bhutchins@gmri.org), (207) 228-1643, or on slack.
      3. Bobbi has office hours every Monday-Thursday from 1-2pm. Zoom link for office hours is <https://gmri-org.zoom.us/j/91304989626?pwd=VUJweU8vSkhKV21XQVkyMkNOaHMyZz09>

(Office hours info last updated on 10/25/21)

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3. IT support
   1. Tim Reich or Nick Georghiou. Questions or formal help requests can be directed to [help@gmri.org](mailto:help@gmri.org), or smaller/quicker questions by contacting Tim or Nick on slack.
4. Academics / Continuing Education
   1. Links to trainings and additional resources
5. Courses / Conferences
6. Computing
   1. Resources at GMRI
   2. Resources at UMaine
   3. Cloud Computing Strategies
7. GMRI resources
   1. Intranet
      1. GMRI’s Intranet is a website managed through sharepoint in which the purpose is to work towards the strategic plan goal of “investing in technology that empowers staff with skills and tools for innovation, collaboration, and efficiency”.
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         3. Staff events
         4. Benefit documents
         5. GMRI policies
         6. Resources for hiring managers
         7. IT documentation
         8. Application cheat sheets and tips
         9. Forms you may need to fill out
         10. Web links to Paylocity, Zoom (specific room zoom links), benefit portal links
         11. Has search engine for fast and effective search