Dear Participating Staff,

I’m excited about working with all of you to develop the CAP for \_\_\_\_\_\_\_\_\_.

You will receive a separate email shortly with a link to the CAP Excel Online workbook.

First, you need to set up a Microsoft OneDrive account to be able to edit the workbook and add comments.  Sign up for a Microsoft OneDrive account, using your email address that this message is being sent to.  Go to <https://onedrive.live.com>

Using the Online Excel Workbook

* When you open the workbook, please Sign In to your Microsoft OneDrive account at the top right.  Then select Edit Workbook.  Then select Edit in Excel Online.
* For the initial assignment, go to the Project tab and enter your name.
* For making entries and edits:

1. If you feel very strongly about a given entry for a target, KEA, etc., add an entry in the workbook.
2. If you want to edit someone else’s entry, you can directly edit the cell. If so, please also add a Comment.
3. Right click on a cell to add a comment for team members to consider.  Then hit “Post.”  (If a comment already exists, hit the + button in the Comments windowpane to add a new one.)

Some observations before you dive in…

Parsimony Please!  Try to be judicious in the number of targets, KEAs and threats. The “80-20 rule” applies – that is, a well-chosen 20% of our selections from the larger number of possibilities will account for 80% of the outcome.

* Targets.
  + The workbook will accommodate up to 12 targets.
* KEAs
  + The current workbook will accommodate 8 KEAs. Hopefully you can use one small set of KEAs that will work across many/all of the targets. The Nevada Freshwater CAP used 5 KEAs across all freshwater ecosystems.
* Threats
  + Try to capture high ranked threats, not the entire universe. Enter Threats on the tab named ThreatList, and they will carry over to the ranking sheet. The workbook will accommodate 15 threats.
* Objectives & Strategies
  + The workbook will accommodate 8 strategic objectives – Objectives tab.
  + Each Objective can have up to 8 strategic actions – Strategy tab.
* Return on Investment
  + Objectives can be evaluated on their ROI.
    - On the Objectives tab scroll down and enter every KEA that is benefited by each Objective, using the dropdown menu. Enter the projected future rating.
    - On the Strategies tab, use the dropdown menus to enter estimated Feasibility and Cost for each Strategic Action.
    - Go to the ROI tab to see the results.

For those of you who are CAP veterans, you’ll notice some changes vs. the longstanding CAP Excel workbook.  Here are a few the highlights:

* An expansion of the KEA rating scale from 4 to 6 grades (adding a Good – and Fair –).  This allows also allows for a more nuanced final score of a target’s health, which previously did not exist, and thus also allows for a ROI assessment.
* A change in the way of ranking stresses, based on the expected future KEA ranking.  Simpler and more robust than the old Stress ranking approach.
* A simpler way of ranking Threats (sources of stress), based solely on expected Contribution of each source. (an analysis of threat scores in a bunch of old CAP workbooks showed that ranking “Irreversibility” had very little impact on the final threat rankings, plus it was often confusing.)
* A comparison scorecard of Current Health vs Future Health with no action (i.e. threats), which previously did not exist.  This was inspired by landscape conservation forecasting.
* A ROI analysis based on selected strategic objectives, also inspired by LCF.

For the Excel Online platform, you will also notice

* There are no navigation buttons or Macros, which are not supported by Excel Online.  You must navigate manually using the worksheet tabs.
* A single “flat” worksheet for making all KEA and Threat ranking entries -- a little cumbersome, but necessary for the online platform.
* Zoom in or out by using the Scroll knob on your mouse

Instructions for Using Microsoft Excel Online:

1. Sign up for a Microsoft OneDrive account, using your TNC email address.  Go to <https://onedrive.live.com>
2. The project leader will send you an invitation to share and edit the Excel Online workbook.
3. When you receive the workbook link, open it, and Sign In to your account at the top right corner.
4. Click the “Edit Workbook” button on the 2nd bar.
5. Choose “Edit in Browser” (or it may say “Edit in Excel Online”).
6. Navigate among worksheets using the tabs at the bottom. Edit any cell. Add, delete, or amend. The workbook will be automatically updated.
7. Add a Comment if you want to explain an Edit – right click on the cell.  Be sure to Post the comment.
8. *You do not need to Save the file*.  The saving is done automatically in the cloud.

Instructions for Project Leader

* Download the Excel workbook to your computer from the link at <http://appliedconservation.com/resources/>
* You must create a Microsoft OneDrive account to manage the project, and you must sign in to your account.
* Add an initial “straw dog” of Project Name and Description. Later on, you can add “straw dogs” for all CAP elements for the team to review (e.g., targets, KEAs, Rating, Threats). You can do this in iterative steps. It’s much more efficient for a dispersed team to have a straw dog to review.
* After you’ve made your initial entries, you then Share the workbook with your team online.
  + Sign in to your OneDrive account.
  + Drag a copy into Files to upload it to your OneDrive account.
  + Open up the workbook online.
  + Use the “Share” button at the top to share the file with your project team. Enter an email address, and add a note (copy the note so you can paste it for other invitees). Underneath the Note, Click where it says “Recipients can edit” in blue font, and indicate the recipient needs to sign in with a OneDrive account (this will allow for their edits and comments to be captured).
  + Repeat for all of your project team. Their names will appear on the left panel
  + They will each get an email from an outlook.com address with a link to the file.
* From then on, as project leader you will use the “Open in Excel” button (underneath the Share button and to the right) to make entries and edits on your computer’s Excel.  However, you MUST then “Save” the Excel file or the edits will not appear Online (*use Save, not Save As, to save it Online*). *Then, after you’ve Saved the file online, use* *Save As to save an updated copy on your computer*. It’s good to Save As copies with new dates every time any significant changes are made.
* You and the team members can make entries and edits Online. Any Online edits are automatically saved. That’s why it’s a good idea for you to make frequent SaveAs copies.