

Features of the new version 6b CAP workbook

This workbook operates similarly to the previous versions of this workbook, but has greater capabilities. The data-related changes in this workbook support strategy effectiveness measures and make this workbook's data model similar to both the Miradi and the new ConPro data models. Other changes were inspired by user requests. Here is a summary of the changes:

What's new in v6b compared to v6a:

- **The new data packs communicate with the new ConPro:** This new workbook can read version 5a, 6a, and 6b workbooks and data packs (a separate Excel file that contains only the user data.) It can create either version 6b or version 5a data packs. The 6b data pack contains all user data that is entered into this workbook. Also (as of August 2009), ConPro now reads only version 6b data packs. To make sure that you are storing ALL of your data and to upload your project data to ConPro, be sure to store your data as version 6b data packs.

This workbook can create 'old' version 5a data packs; however, the version 5a data pack contains only data that can be entered and read by a version 5a CAP workbook – it does NOT store the data that is newly available to the version 6b workbook. For example, if you enter a time series of measurements, the version 5a data pack will store only one measurement -- the measurement with the most recent date.

- **Indicator and key attribute names are no longer 'shared' across viability rows.** If you edit a key attribute name in a viability row or an indicator name in any measurement row (viability, threat or other), the changes will no longer be applied to other instances of that name elsewhere in the workbook.
- **Each viability row can now have its own priority rating, progress updates, and indicator comments.** This is true for all 'things being measured' by indicators – threats to targets, or other (non-viability, non-threat) items – as well as viability rows.

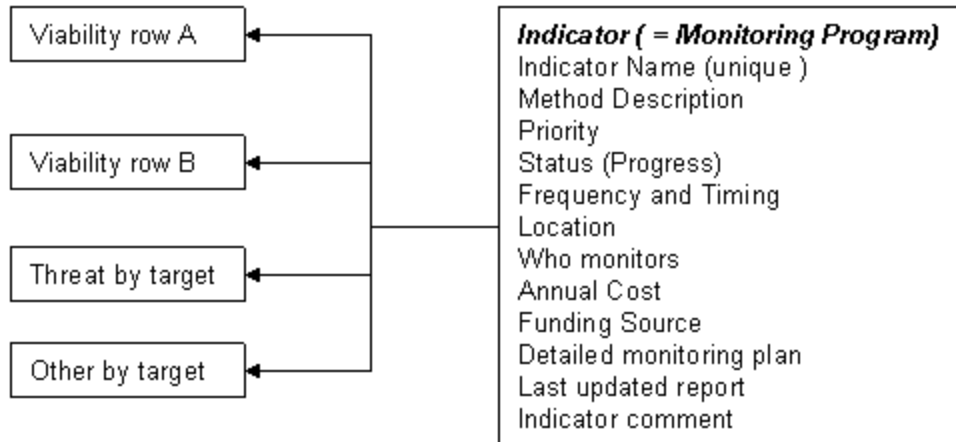
Example: Suppose that an indicator was used for five different viability rows in a previous version of the workbook. It would have had only one indicator name, one priority rating, one status rating, and one comment stored in the workbook. When that data is transferred to the new v6b workbook, it is stored five different times for each viability row; therefore the name, priority, progress and comment can each now be edited to support the specific row. (See the next page for more detail.)

- **Users can share monitoring methods and descriptions across indicator measurements.** In the previous version of the workbook, the monitoring methods and detail were connected to one indicator only, and the connection applied even if the indicator was measuring targets that were unrelated to the monitoring methods and detail. This version connects the monitoring methods and detail to the things being measured (see the next page for more detail).

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What's new in v6b compared to v6a (cont.):

CAP version v5a:



CAP version v5a (and v6a):

1) A Monitoring Program was defined by an Indicator:

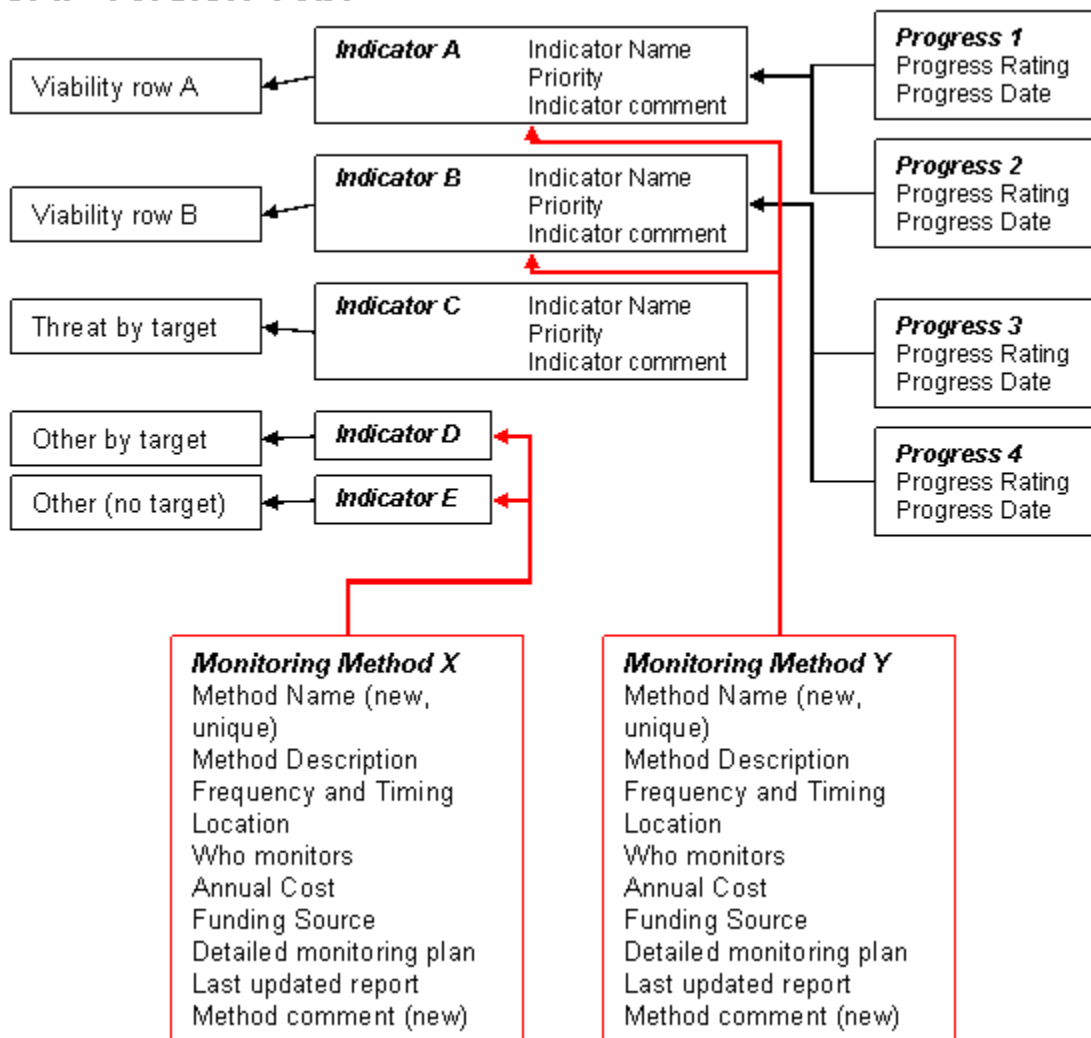
- **Indicator (= Monitoring Program)**
 - a) Indicator Name (unique to this indicator)
 - b) Methods
 - c) Priority
 - d) Status (Progress)
 - e) Frequency and Timing
 - f) Location
 - g) Who monitors
 - h) Annual Cost
 - i) Funding Source
 - j) Detailed monitoring plan
 - k) Last updated report
 - l) Indicator comment

2) An indicator would potentially be shared across multiple “things being measured” (for example, viability rows).

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What's new in v6b compared to v6a (cont.):

CAP version v6b:



CAP version v6b:

- 1) An indicator is for only one “thing being measured” (for example, one viability row), and consists of:
 - **Indicator**
 - a) Indicator Name
 - b) Priority
 - c) Indicator comment
 - **Data from Previous Version**
 - a) Indicator Name (not unique)
 - c) Priority
 - l) Indicator comment
- 2) Multiple Progress (Status) records, each with a date, are linked to each indicator.
- 3) Monitoring “Methods” are linked to Indicators so that typically one method would support multiple indicators.

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What's new in v6b compared to v5a:

- **Each summary table has its own worksheet. The summary tables have more display options and are no longer limited to displaying only eight targets at a time:**
 - **The Viability Summary table** is now in a new worksheet, Σ Viability, which allows it to expand to as many targets as desired. This table can now display the summary ranks for either current ratings or desired ratings. It has various formatting options that make it easy to display (or hide) the information that was in the previous version's 'detailed viability summary.' And it can display the threat-to-target ranks alongside the viability ranks.
 - **The Summary of Threats table** is now displayed in a new worksheet, Σ Threats, which allows it to expand to as many targets as desired. This table can also display a summary of user-selected threats and targets.



The Summary of Threats format that displays a strategic action or indicator index has been replaced in this version with a new table located in the Monitoring worksheet named: 'Threats by target: Indicators & Actions.'

- **The Stress Matrix table** is now displayed in a new worksheet, Σ Stresses, which allows it to expand to as many targets as desired. This table can also display a summary of user-selected stresses and targets.
- **Users have greater control of table formats and greater flexibility in printing and loading tables to Microsoft Word.** In the Viability, Monitoring, and Strategies worksheets, the table format forms have been redesigned to offer many more table format options. Users can select which rows and columns to display.

Print preview and load-to-Word is available for whatever tables are displayed. The user can select paper size and paper orientation.
- **Users can hide worksheets that they may not be using, and reposition the CAP Toolbar.** The **Hide / Zoom Worksheets & Position Toolbar** button at the top of the Home worksheet enables users to hide (and unhide) up to eight of the thirteen worksheets, and to position the CAP toolbar either vertically along the right side of the screen or horizontally at the top of the screen.

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What's new in v6b compared to v5a:

- **Users can enter multiple indicator measurements and progress updates across time instead of only one measurement.**

There are new table formats and wizards in the Viability, Monitoring, and Strategies worksheets for entering and displaying time-series measurements. The Tables menu has one new option, 'Create Measurement or Progress Row,' to easily add a new measurement wherever needed.

- **Indicator measurements** -- including measurements of key attributes and threats – may be entered for an unlimited number of time periods. These measurements now contain additional fields, including drop-down list selections for 'trend' and 'measurement source.'

- Indicator measurements of key attributes can be entered directly into tables in the Viability worksheet or via the updated Viability wizard.
- Indicator measurements of threat and other items can be entered directly into tables in the Monitoring worksheet or via the new Threats and Other Measurements wizard.

- **Progress updates** for strategic actions, action steps, and indicator measurements may be entered for an unlimited number of time periods.

- Progress updates for strategic actions and action steps can be entered directly into tables in the Strategies worksheet or via the Strategy Ranking and Action Steps wizards.
- Progress updates of indicator measurements can be entered directly into tables in the Viability and Monitoring worksheets or via the Viability wizard and the new Threats and Other Measurements wizard.

- **Users can share monitoring methods and descriptions across indicator measurements:** In the previous version of the workbook, the monitoring methods and detail were connected to one indicator only, and the connection applied even if the indicator was measuring targets that were unrelated to the monitoring methods and detail. This version connects the monitoring methods and detail to the things being measured.

- **Users can connect what is measured by an indicator to objectives:** In the previous version of the workbook, if an objective was connected to an indicator, the connection applied even if the indicator was measuring targets that were unrelated to the objective. This version connects the objective clearly to the things being measured.

- **Other:** There are new fields for entering latitude and longitude, for entering parent projects, and for classifying marine ecoregions.