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Rapid Benefit Indicator (RBI) Checklist Tool - Quick Start Manual

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The Rapid Benefits Indicators (RBI) approach consists of five steps and is outlined in **Assessing the Benefits of Wetland Restoration – A Rapid Benefits Indicators Approach for Decision Makers**, hereafter referred to as the "guide". This checklist tool is intended to be used to record information as you answer the questions in that guide. This quick start manual gives you directions on the mechanics of the checklist tool, but does not provide guidance on performing the assessment as the guide does.

Requirements

The checklist tool uses a macro-enabled Excel workbook (.xlsm) and was developed in Microsoft Excel 2013. It may or may not be back- or forward-compatible with different versions of Microsoft Excel, including Microsoft Office for Mac. If the checklist tool is not compatible with your system, you can download the **Simplified Checklist Tool** which is a normal Excel worksheet (.xlsx), or print Appendix 1 of the guide or the companion fillable PDF file. Operating system and hardware requirements for running this tool are the same as those for using Microsoft Excel 2013: https://technet.microsoft.com/library/ee624351(office.15).aspx#Overview1

Enabling Macros

If you get a Security Warning... Because this workbook contains VBA macros, you may be challenged with a Security Warning upon opening the workbook (a message in upper left of screen). If you do receive this warning, respond by clicking "Enable Content", and comply with subsequent dialog boxes if requested to continue.

Example of security warning (exact wording and formatting varies by Excel version).

Welcome Page

The Welcome Page includes information on:

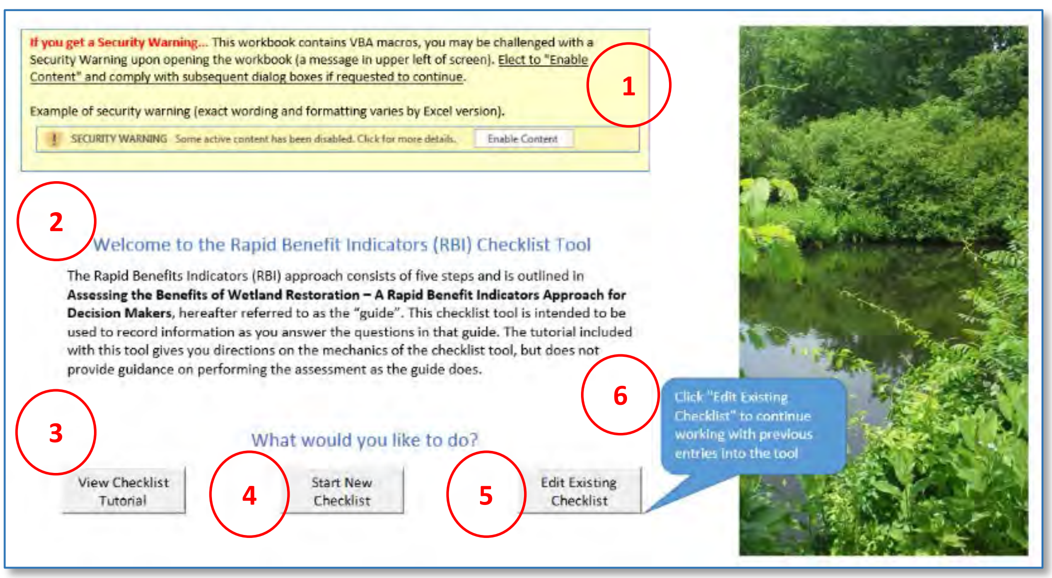
1) Enabling the VBA Macros in the checklist tool which allow for its advanced capabilities
2) How this checklist tool relates to the guide

From this page you can click:

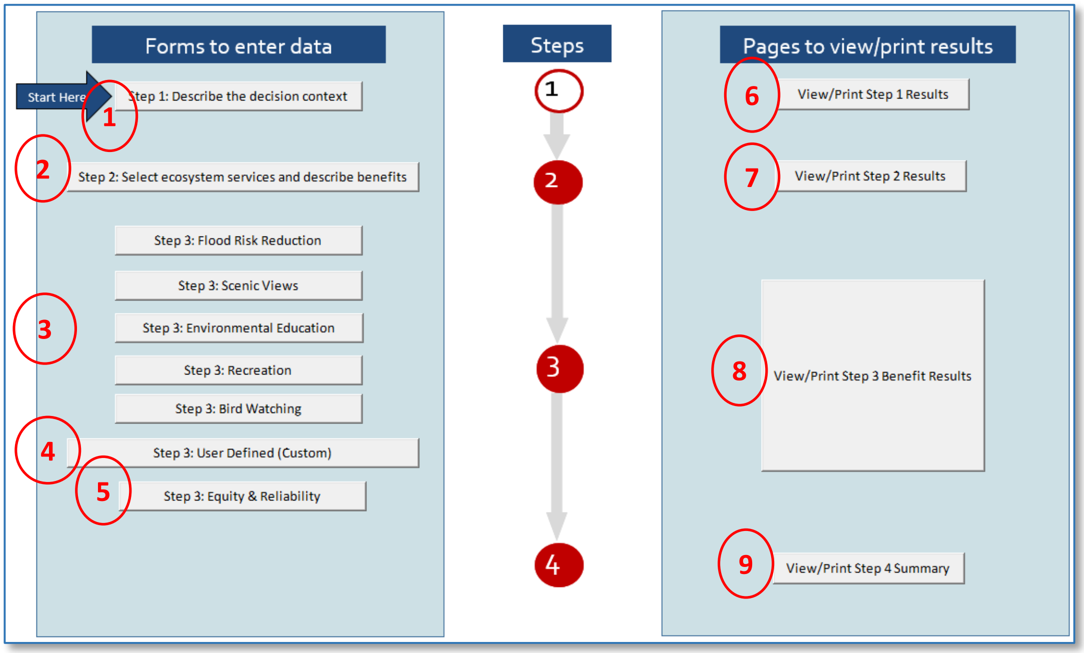
3) "View Example Checklist" to open the Tutorial page
4) "Start New Checklist" to start a new, blank checklist and open the Main Menu page
5) "Edit Existing Checklist" to open the Main Menu page to alter previously entered data

Hovering the mouse over buttons:

6) Many buttons have a description that appears when the mouse is placed over the button



Main Menu Page



On the left side of the **Main Menu** are buttons to open forms for data entry:

1) Step 1 loads a form to enter background information applicable to your assessment and the restoration sites under consideration. The checklist can accommodate 1-10 sites.
2) Step 2 loads a form to select the most relevant ecosystem services and their associated benefits for the potential restoration site(s). Guide pages 4-5 describe how to choose these. This form is also used for basic information about each of the benefits, including possible concerns or "disservices" that may result from restoration, and how ecosystem services flow to benefit people (guide pages 20-21). Default text for benefits from the guide (pages 22-27) is provided, but can be altered to fit the benefits you are assessing. The form also requires you to indicate whether you intend to assess the Social Equity and Reliability of benefits.
3) Step 3: “Flood Risk Reduction”, “Scenic Views”, “Environmental Education”, “Recreation”, and “Bird Watching” each load a form specific to that benefit, with questions following the Rapid Benefit Indicators assessment developed in the guide.
4) Step 3: “User Defined (Custom)” loads a blank Step 3 form for adding other benefits.
5) Step 3: “Equity & Reliability” loads a form to enter information regarding social equity and reliability of benefits.

Step 3 form buttons will not appear until benefits have been selected in step 2.

On the right side of the Main Menu are buttons to format and open pages showing results:

6) “View/Print Step 1 Results” loads a formatted page showing results entered on the Step 1 form.
7) “View/Print Step 2 Results“ loads a formatted page showing results entered on the Step 2 form.
8) “View/Print Step 3 Results“ loads a formatted page for each of the selected benefits showing the results entered into each benefit indicator form.
9) “View/Print Step 4 Results“ loads a formatted page showing summarized results from all benefit indicators, color-coded to facilitate comparisons.

Form buttons will not appear until data are entered for each step.

Filling Out Data Entry Forms

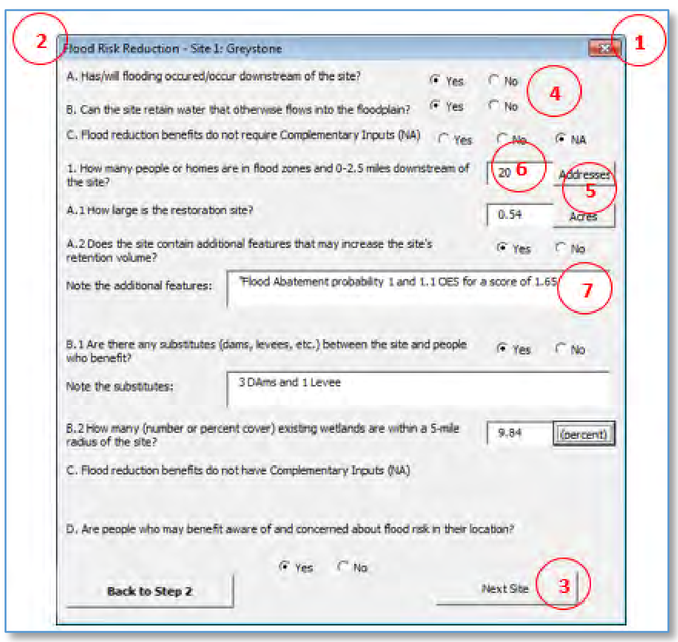
Each of the buttons on the left of the Main Menu opens a pop-up form. Until the pop-up form is closed, changes cannot be made to the Excel tool. As new entries or changes are made in the forms, the data in the tool are updated, automatically incorporating your edits. While you do not need to save edits to individual forms before closing that form, you will need to save all entries and edits to the workbook before closing the tool.

Each form has some standard sections:

1) A red “Close” button
2) The header includes the name of the form followed by the name of the current site if it is a site-specific form (for example, the Step 3 forms are all site specific). Site-specific forms will always load showing the first site.
3) Site-specific forms all have standard navigation buttons at the bottom to go to the previous site or to the next site. If there is no previous site (when editing the first site) this button is replaced by a button to navigate to the previous step (as shown in the figure). If there is no next site (when editing the last site) this button is replaced by a button to navigate to the next step.

Non-standard form functions:

4) Forms may have check boxes. Check boxes for “Yes/No” questions allow only one to be selected. On the Step 2 form, multiple check boxes can be selected for services and benefits.
5) Forms may have buttons that will initiate another pop-up. Until that pop-up is closed, the form cannot be altered.
6) Forms may have quantitative text boxes. Although non-numeric responses can be entered in these, only numeric responses are summarized in the Step 4 summary page/sheet.
7) Forms may have qualitative (narrative) text boxes, usually for the user to provide notes on a previous response. Notes can be important when deciding between two sites that have similar features, where additional information on those features helps differentiate them. Notes can also provide information on how a previous response was determined.



User-Generated Pages (Sheets) for Viewing and Printing Results

Once you have entered your results into the Checklist tool using the Forms, you can use the tool to produce formated pages for viewing and printing these results. Although results can also be altered in these view/print pages, we recommend using the Forms for data entry.

The Checklist Tool uses row height and column width to dynamically adjust the page sizes based on user entries in previous steps. These have been formatted to optimize printing in landscape mode. Row heights and column widths can be manually adjusted to suit your needs, but be aware that navigating between sheets may cause your formatting adjustments to be lost. *Be cautious, as any changes you make to colors, questions, guidance on questions, worksheet names or headers may not be reset by starting a new project and may alter checklist functionality.*

Each page has 3 standard sections:

1. **Header**: The section along the top of the page describes what step of the process the user is on and what sites correspond to each column.
2. **Questions and Categories**: The section along the left of the page is numbered and lettered based on the step and question, to match questions to the assessment guide. If you click on the question in the cell you will also be provided with more details on what the question is asking.
3. **User Entries**: For each question, the information that was entered in the forms will appear in these cells. Based on certain entries, some parts of the assessment may automatically be filled out. For example, when you change the names for sites in Step 1, names for those sites will be updated in the headers of subsequent steps. In some instances *this makes it important to fill out the assessment steps and questions in order*.

Each page has a “Reset” or “Clear Form” button, which deletes all the entries on the form and starts that step over. The Step 2 page also has a “Refresh” button to update sections 2.B-2.D based on the Benefits that are checked in 2.A. Each page will also refresh when it is opened. Editing user entries on pages will update the entries on the Forms the next time the form is opened, with the exception of entries that were entered in a previous step such as site names (entered in step 1) and entries on the Step 4 summary page. Each time the Step 4 summary page is opened the user entries on it will refresh, meaning any previous changes made in the table on Step 4 will be lost.

Step 4 Summary Table Color Coding

The view/print results page for Step 4 summarizes responses from Step 3 into a color-coded table. See guide pages 57-59 for more information on how user entries are color coded and can be used to make decisions.

A brief overview:

- Blue-colored responses indicate higher-valued benefits, and red-colored responses indicate lower-valued benefits.
- If both sites have the same color, more information may be needed. If all sites had the same "No" response, they appear in gray. If all sites had the same "Yes" response, information recorded in the notes sections for these questions may help further differentiate the sites.
- If a response is in black, no information was entered in Step 3. This may be because that site didn't pass initial screening, indicating a benefit is not produced.
- If a question is not applicable it appears in gray with “NA.”

Changes can be made to the color or text in the results area of the summary table, but these changes will not be saved to earlier steps of the assessment and will be overwritten anytime the page is refreshed. *The text and formatting of questions and headers for the summary table should be altered with extreme caution since these may be permanent even after starting a new checklist.*