

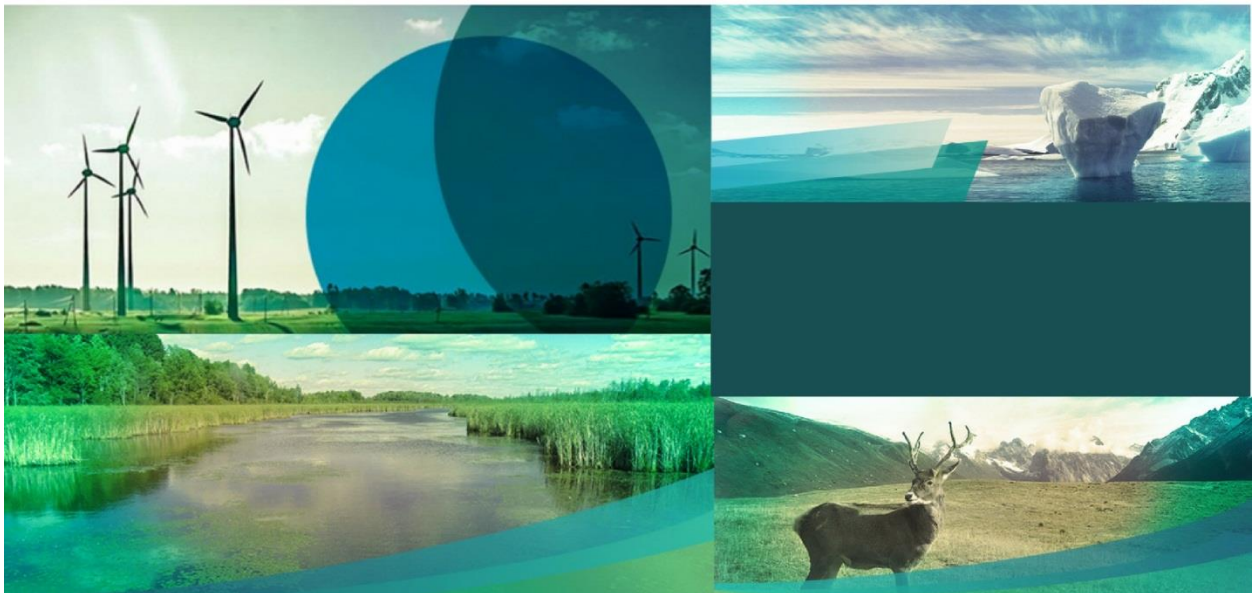


**EVRI** Environmental Valuation  
Reference Inventory



## Environmental Valuation Reference Inventory (EVRI)

Website User Manual / Manuel de l'utilisateur du site Web



EVRI User Manual August 16, 2017

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# Chapter 1 – Introduction to Website

This introductory chapter of the User manual will highlight the following

## 1.1 Overview

## 1.2 What type of information is in the EVRI

### 1.1 Overview

The Environmental Valuation Reference Inventory™, EVRI™, is a searchable storehouse of summaries of empirical studies on the value of the environmental and human health effects, henceforth referred to as the Infobase. It has been developed as a tool to help policy analysts and researchers conduct literature review and use the benefit transfer approach.

The InfoBase is only accessible to registered subscribers who have a valid user ID and password. The EVRI is an exclusively Web-based application, designed for use with most Web browsers. Users may choose to work in English or French, although only the interface is translated (not the study summaries' content). New study summaries may be added and comments or suggestions on existing summaries can be submitted as a registered user.

### 1.2 What type of information is in the EVRI?

The EVRI's summaries of valuation studies outline the pertinent valuation findings and results necessary for a researcher to identify the best candidate studies for a potential benefit transfer application.

The online database has available over 4,000 valuation study records referred to as Study Summaries. These Study Summaries provide details on environmental valuation studies, most of which are published studies from renowned experts around the world. This Infobase intends to facilitate literature review, environmental valuation and the application of benefit transfer.

Each Study Summary consists of six main categories of data:

- a. Study Reference/Source – basic bibliographic information
- b. Study Area and Population Characteristics – information about the location of the study, along with population and site data
- c. Study Focus – fields that describe the environmental assets being valued, the stressors on the environment, and the specific purpose of the study
- d. Study Methods – methodological information on the study, along with the specific techniques that were used to generate results
- e. Estimated Values – the monetary values that are presented in the study as well, as the specific units of measures
- f. Abstract/Summary – a summary of the key valuation findings in the study

# Chapter 2 – Essential Functions

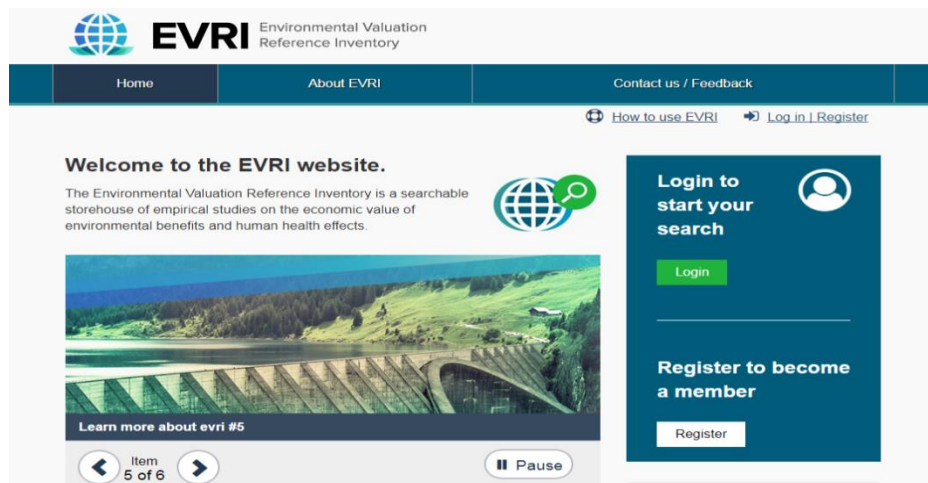
Having highlighted the different user roles, let us take a look at the essential functions for all users. This chapter will cover:

- 2.1 How to Create an Account
- 2.2 How to Login
- 2.3 How to Search for Study Summaries
- 2.4 How to Export/Download your Search Results
- 2.5 How to Save Search Results
- 2.6 How to Retrieve/Edit your Saved Search
- 2.7 How to Provide Feedback/Contact Us

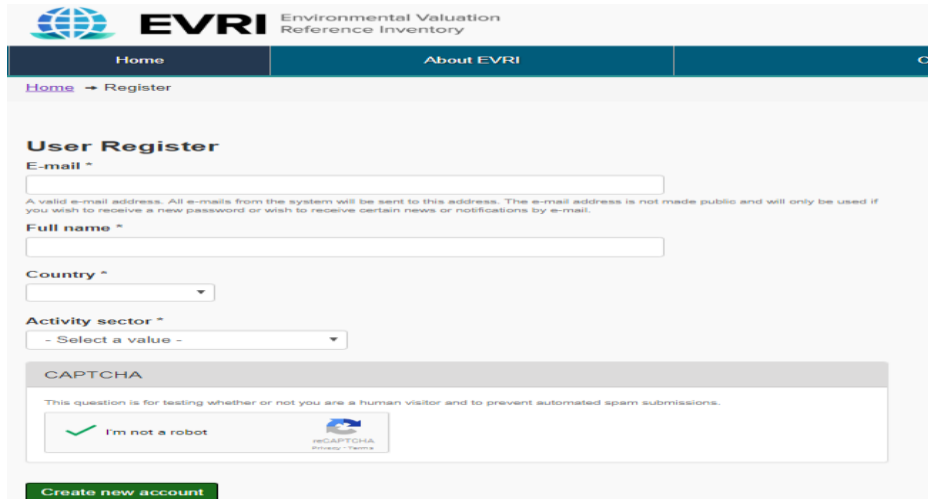
## 2.1 How to Register an Account

Follow these steps to register for your own user account.

- a. Click on “Register” on the lower right menu bar, under *Register to become a member*.



- b. You will be asked to fill out your information (see image below)



The screenshot shows the 'User Register' form on the EVRI (Environmental Valuation Reference Inventory) website. The form includes fields for 'E-mail \*', 'Full name \*', 'Country \*' (a dropdown menu), and 'Activity sector \*' (a dropdown menu with '- Select a value -'). Below these fields is a CAPTCHA section with a green checkmark and the text 'I'm not a robot'. At the bottom of the form is a green button labeled 'Create new account'.

- c. On the Captcha field, check the box to confirm that you are a human visitor. This is in place to reduce unwanted machine interference.
- d. After you complete all fields correctly, click on “Create a new Account”.
- e. You will be redirected to the home page and the following message will appear on the green interactive bar:

A welcome message with further instructions has been sent to your e-mail address.

- f. Go to your email and follow the link to create your new password.
- g. Click “Save”. You have successfully created a General User Account

Note: The system-generated password sent to your email is only valid for 24 hours.

## 2.2 How to Login to your Account

Once you have registered and have a valid user ID and password, you can login to the EVRI Infobase.

- a. On the Home page, top right, click on “Log in/Register” link. You will then be presented with a screen to enter your user ID and password. See below.

The screenshot shows a login and registration interface. On the left, there is a login form with two input fields: 'Please enter your e-mail address \*' and 'Password \*'. Below the email field is a small text prompt 'Please enter your e-mail address.' Below the password field is a small text prompt 'Enter the password that accompanies your e-mail.' and a link 'If you forgot your password, [request a new password](#).' At the bottom of the login form is a blue button with a right arrow and the text 'Log in'. On the right, there is a registration box with the text 'If you are not already registered please select the button below to create an account.' and a yellow button with the text 'Create your account'. Below the login form, there is a link '[License Agreement](#)'.

- b. Enter your user ID / rmail address and password, then click on the Login button at the bottom of the page.

## 2.3 How to Search for Study Summaries

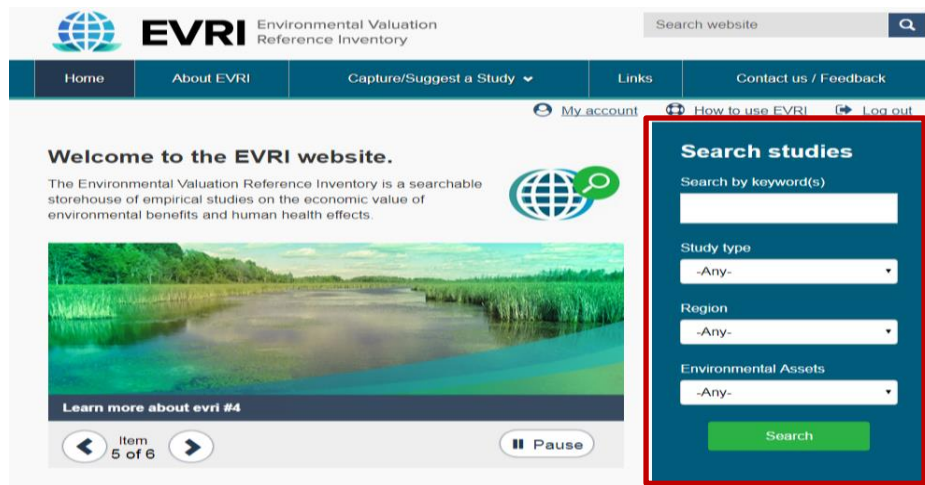
After you've logged in to your account, you will be able to search the EVRI Infobase. There are three different ways to search the EVRI Infobase:

1. From the Home Page, click directly on the Green Search button (do not enter any text in the Search box), and you will be taken to the Search Page. It will by default show results for all published summaries. You can then use the facet filters on the right menu bar to further refine your searches. See details below.
2. From the Home Page, in the top right Search Website area, you can type a word and click on the magnifying glass to execute the search on that word. You will be taken to the Search Page, where the results of your search will be displayed.
3. From the Search Studies menu bar on the right, under Search by Keyword(s), you can type a word and click on the green Search button to execute the search. You can also select sub-sets from the 3 drop-down lists to refine your search: Study Type, Region, and Environmental Assets. You will be taken to the Search Page, where the results of your search will be displayed.

After you execute your search you will be taken to the Search Page displaying the search results. From the Search Page, additional search and filter options are available to enhance your search.



## 2.3.1 Home Page

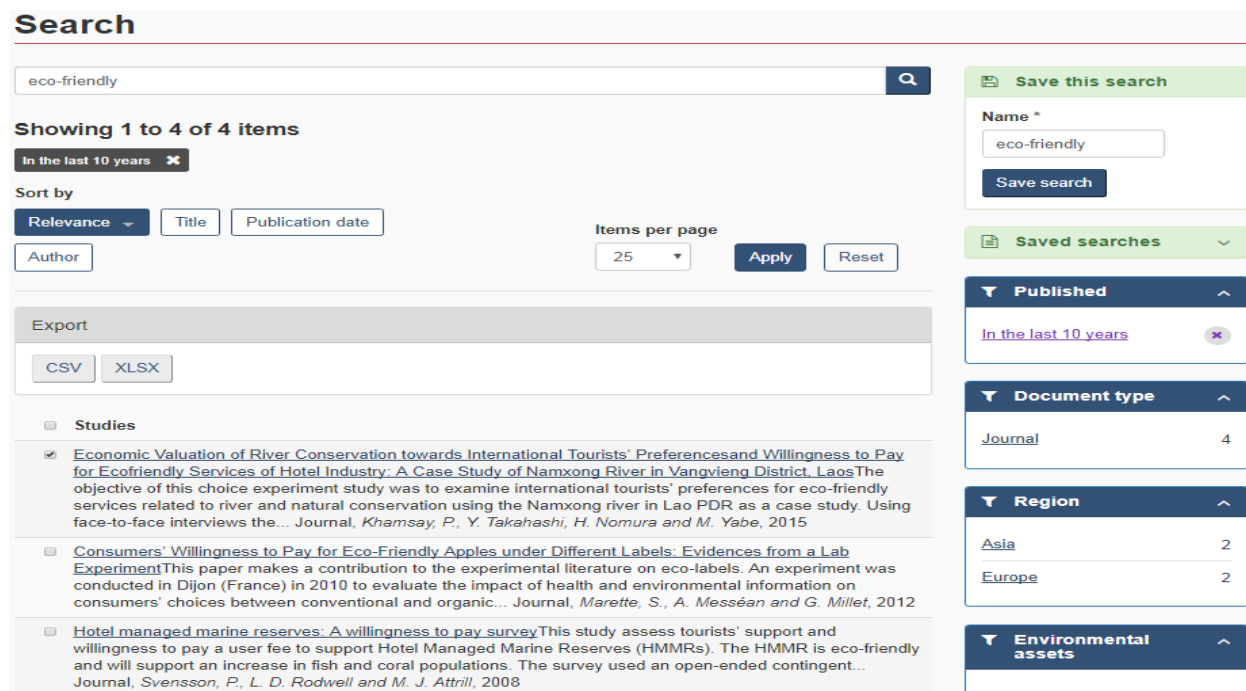


The screenshot shows the EVRI (Environmental Valuation Reference Inventory) Home Page. The header includes the EVRI logo, the text "Environmental Valuation Reference Inventory", and a search bar. The navigation menu has links for Home, About EVRI, Capture/Suggest a Study, Links, and Contact us / Feedback. Below the navigation menu, there is a "Welcome to the EVRI website." section with a description of the inventory and a "Learn more about evri #4" button. A large image of a lake is displayed. On the right side, there is a "Search studies" sidebar with a search bar and filters for Study type, Region, and Environmental Assets. The sidebar is highlighted with a red border.

**Search by keyword:** You can search the Infobase using keywords that are relevant to your search. You can search for compound words such as; rainforest (closed form), eco-friendly (hyphenated form), carbon footprint (open form). The search engine will examine all text fields in the Infobase for the existence of that word, and return those matching Study Summaries in the Search Page results.

## 2.3.2 Search Page

The Search Page presented below displays results from a search for “eco-friendly”.



The screenshot shows the EVRI Search Page. The search bar contains the text "eco-friendly". Below the search bar, it says "Showing 1 to 4 of 4 items". There are filters for "In the last 10 years" and "Sort by" (Relevance, Title, Publication date). The "Items per page" is set to 25. There are buttons for "Apply" and "Reset". Below the search results, there is an "Export" section with buttons for "CSV" and "XLSX". The search results are listed in a table with columns for "Studies", "Document type", "Region", and "Environmental assets".

Studies	Document type	Region	Environmental assets
<input checked="" type="checkbox"/> <b>Economic Valuation of River Conservation towards International Tourists' Preferences and Willingness to Pay for Ecofriendly Services of Hotel Industry: A Case Study of Namxong River in Vangvieng District, Laos</b> The objective of this choice experiment study was to examine international tourists' preferences for eco-friendly services related to river and natural conservation using the Namxong river in Lao PDR as a case study. Using face-to-face interviews the... Journal, Khamsay, P., Y. Takahashi, H. Nomura and M. Yabe, 2015	Journal	Asia	2
<input type="checkbox"/> <b>Consumers' Willingness to Pay for Eco-Friendly Apples under Different Labels: Evidences from a Lab Experiment</b> This paper makes a contribution to the experimental literature on eco-labels. An experiment was conducted in Dijon (France) in 2010 to evaluate the impact of health and environmental information on consumers' choices between conventional and organic... Journal, Marette, S., A. Messéan and G. Millet, 2012	Journal	Europe	2
<input type="checkbox"/> <b>Hotel managed marine reserves: A willingness to pay survey</b> This study assess tourists' support and willingness to pay a user fee to support Hotel Managed Marine Reserves (HMMRs). The HMMR is eco-friendly and will support an increase in fish and coral populations. The survey used an open-ended contingent... Journal, Svensson, P., L. D. Rodwell and M. J. Attrill, 2008	Journal	Asia	2

Note: The keyword searched on will be highlighted in bold font within the study.

From the Search Page, you can do the following:

- a. Further refine your search using the facet filters on the right side of the page.
- b. Export the results of your search to a spreadsheet format
- c. Use the check box beside each study to indicate which Study Summaries will be exported.
- d. Save a Search criteria for future use
- e. Re-run a saved Search criteria

### 2.3.3 Using Search Facets and Filters

Search facets enable you to easily refine your search by selecting one or more facet(s). As you refine your search, the number of study summaries in each facet options changes to reflect an actual count of the study summaries with that metadata. The available search facets are presented below.

You can **filter** your search result based on the following parameters:

**Publication Date:** This filter offers date ranges to narrow your search to studies to the last year, last 5 years or last 10 years.

**Document type:** This filter includes sub-filters to describe the original format of the study, e.g. whether published as a journal, government/non-government report, working paper, conference paper, dissertation/thesis, chapter in book, magazine, or book.

**Region:** This filter describes the region(s) and specific country(ies) the study is addressing (which may differ from where the study was authored), e.g. Africa, Asia, Caribbean, Central America, Europe, North America, Oceania, or South America.

**Environmental assets:** This filter describes the general type of environmental asset that is being valued in the study, e.g. air, animals, human health, land, man-made environment/infrastructure, micro-organisms, plants, or water.

**Type of Value/Usage:** Based on the Total Economic Value framework and an anthropocentric perspective, this filter provides information on the general type of values reported in the study, and whether a human health impacts were valued, e.g. built environment, ecological functions (indirect uses), extractive uses, human health, non-extractive uses, or passive uses.

**Study type:** This filter describes the general methodological approach of the study, whether it was primary valuation, secondary valuation (benefits transfer), or meta/synthesis analysis.



**Valuation techniques:** This filter describes the general type of monetary valuation methodology used in the study, whether based on actual market pricing, revealed preference, or stated preference.

**Economic measures:** This filter describes the specific type of monetary valuation instrument used in the study, e.g. compensating surplus, compensating variation, consumer surplus, cost of injury/replacement, equivalent surplus, equivalent variation, price, willingness to accept, or willingness to pay.

After you have filtered your search using the facets above, you have the option to either **save your search criteria** or **export/download your search results**.

## 2.4 How to Export, Download and Import your Search

After you filter your search result, select one or more studies that you wish to export. You can download files in either .csv or .xlsx formats.

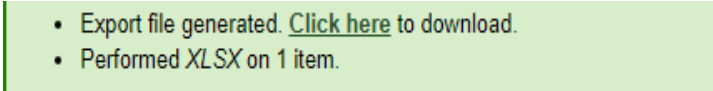
If you want to select all the Study Summaries in your list, you can do this by clicking on the check box next to the word **Studies** at the top of the list. This will select all Study Summaries displayed in the page to be included in your export, but you will also be offered to the option to export all applicable Study Summaries.

The export to XLSX and CSV steps are described below:

a. Download as .xlsx

The **XLSX file** is formatted for MS Excel and clicking on it should open Excel and put the Study Summary list in a worksheet within the spreadsheet program.

- i. Select the option “XLSX”
- ii. On the green interactive bar, click on the “Click here” hyperlink to download the document

- 
- Export file generated. [Click here](#) to download.
  - Performed XLSX on 1 item.

b. Download as CSV

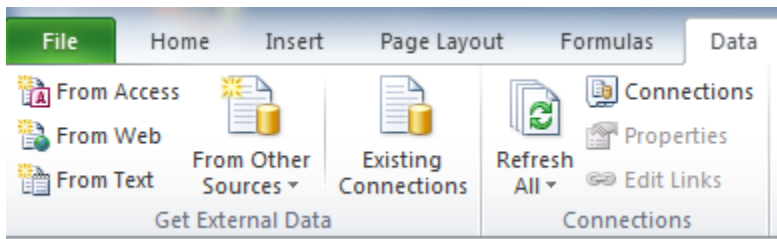
- i. Select the option “CSV”
- ii. On the green interactive bar, click on the “Click here” hyperlink to download the document

- Export file generated. [Click here](#) to download.
- Performed CSV on 1 item.

**Note:** **CSV** (comma separated values) is a standard file format used to store and share tabular data with other programs and systems. **CSV** Files can be used with any spreadsheet program, such as Microsoft Excel or OpenOffice Calc.

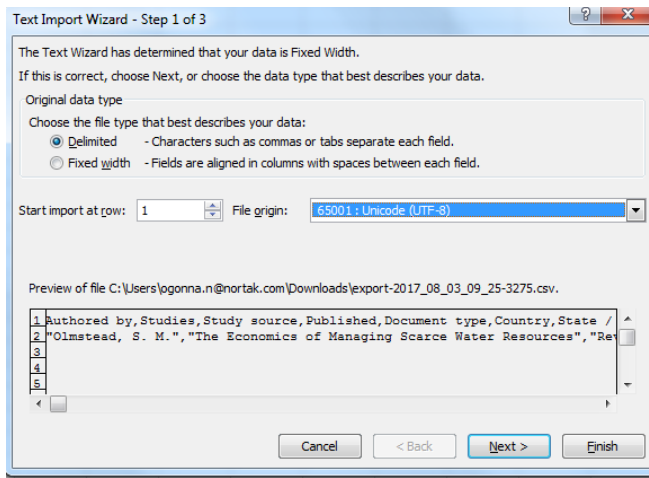
### 2.4.1 To import CSV file to Excel

- First and foremost, open the Microsoft Excel program. Do not open the .csv file yet.
- On the file tab, select “Create new”.
- Go to the Data menu, then select “From Text” option.

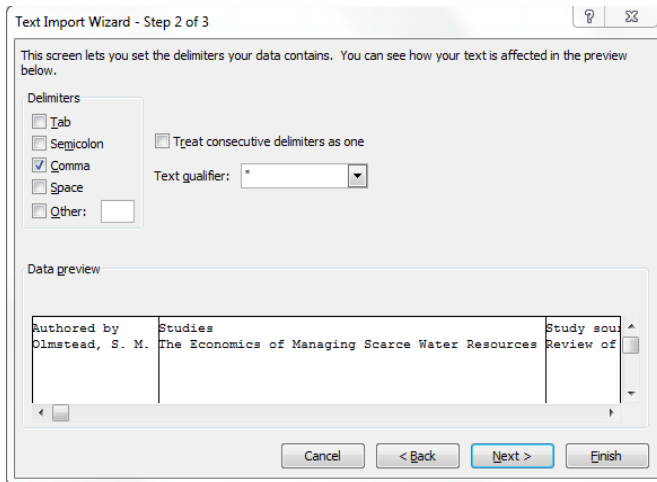


- Open the .csv file that was downloaded/imported from the EVRI InfoBase.
- Change original data type to “Delimited” and “File origin” to 65001: Unicode(UTF-8) .

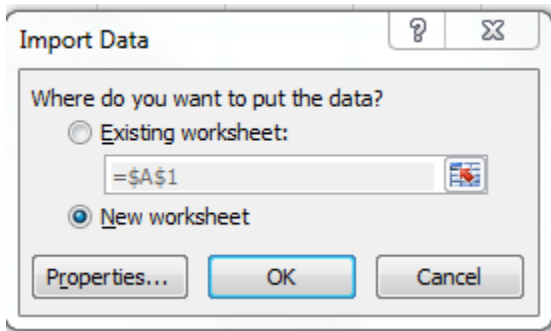
**Note that this is essential to convert French characters to a readable format.**



- Click Next.
- Set Delimiters to “Comma” by checking the box. (Remove the Tab delimited check box option).



- h. Make sure “Text qualifier” is set to double quotes (”) and click Next.
- i. Click Finish to import.



- j. Select New Worksheet or use Existing worksheet and click OK.

## 2.5 How to Save Search Criteria

Once you have a list of Study Summaries that you may want to refer to again, you can save the Search Criteria used to build that list.

- a. Within the **Save this search** light green pane on the right side of the screen, under **Name**, type the name you want to save this Search Criteria as.
- b. Click the **Save search** button after you are done.

**Search**

eco-friendly

Showing 1 to 4 of 4 items

In the last 10 years

Sort by

Relevance Title Publication date

Author

Items per page 25 Apply Reset

Export

CSV XLSX

Studies

- ☒ Economic Valuation of River Conservation towards International Tourists' Preferences and Willingness to Pay for Eco-friendly Services of Hotel Industry: A Case Study of Namxong River in Vangvieng District, Laos. The objective of this choice experiment study was to examine international tourists' preferences for eco-friendly services related to river and natural conservation using the Namxong river in Lao PDR as a case study. Using face-to-face interviews the... Journal, Khamsay, P., Y. Takahashi, H. Nomura and M. Yabe, 2015
- ☐ Consumers' Willingness to Pay for Eco-Friendly Apples under Different Labels: Evidences from a Lab Experiment. This paper makes a contribution to the experimental literature on eco-labels. An experiment was conducted in Dijon (France) in 2010 to evaluate the impact of health and environmental information on consumers' choices between conventional and organic... Journal, Marette, S., A. Messéan and G. Millet, 2012
- ☐ Hotel managed marine reserves: A willingness to pay survey. This study assess tourists' support and willingness to pay a user fee to support Hotel Managed Marine Reserves (HMMRs). The HMMR is eco-friendly and will support an increase in fish and coral populations. The survey used an open-ended contingent... Journal, Svensson, P., L. D. Rodwell and M. J. Attrill, 2008

Save this search

Name \* eco-friendly Save search

Saved searches

Published

In the last 10 years

Document type

Journal 4

Region

Asia 2 Europe 2

Environmental assets

Photo 2

## 2.6 How to Retrieve/Edit your Saved Search Criteria

After you've logged in to your account; under the "View" tab of the "My Account" section,

- On the right-hand side, within the **Saved search** pane, click on the name you previously stored your search as.
- Click on the Saved Search to run it.

Note that a Saved Search holds the search criteria, not the results, so when you run a Saved Search, it could find newly published Study Summaries that match the search criteria.

- To edit or delete, simply click on the Edit or Delete button, as displayed below.

View Edit

Recent exports

Export from 2017-07-13 3:32pm

Export from 2017-07-13 3:31pm

Export from 2017-07-07 11:10am

Export from 2017-07-07 11:09am

Export from 2017-07-07 11:02am

Export from 2017-07-07 10:54am

Saved searches

eco-friendly

Edit Delete

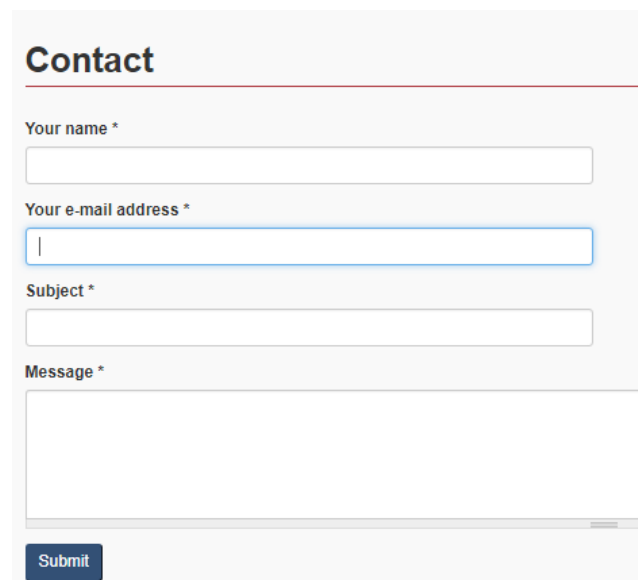
You can also view all recent exports on this page and run an export again from here. A history of recent exports is automatically created, up to a maximum of 10.

As an alternative, you can also find/access your saved searches under the green widget on the right hand-side of the search results screen. You will have to manage this list and delete entries if the list gets too long.

## 2.7 How to Provide Feedback/Contact Us

All users that visit our website, regardless of whether they have an EVRI Account, are able to leave feedback.

Complete the fields in the Contact Us page and click on Submit. An email message will be sent to the System Administrator.



The image shows a web form titled "Contact" with a red underline. It contains four input fields: "Your name \*" (a single-line text box), "Your e-mail address \*" (a single-line text box with a blue border), "Subject \*" (a single-line text box), and "Message \*" (a multi-line text area). At the bottom left of the form is a dark blue "Submit" button.

**Contact**

Your name \*

Your e-mail address \*

Subject \*

Message \*

Submit

## Chapter 3 – General User Functions

In addition to searching the EVRI InfoBase, exporting lists, and saving search criteria, a General User can perform the following functionalities:

1. Create a Study Summary/Capture
2. Suggest a new study to be added to the InfoBase
3. Suggest changes to an existing Study Summary

All registered users are able to submit a Study Capture. However, all contributions from a General User are subject to review by a Manager or System Administrator.

This chapter will explain in detail;

- 3.1 How to create/capture a Study Summary
- 3.2 How to suggest a new Study Summary be added to EVRI
- 3.3 How to suggest changes to an existing Study Summary
- 3.4 How to modify a Study Summary, if returned by a Manager

### 3.1 How to Create/Capture a Study Summary

The Capture a Study function involves creating a Study Summary in the EVRI Infobase by filling all standardized information fields.

#### 3.1.1 Work Flow Process for a New Study Summary

In order to create a Study Summary, a user must enter information into the database, which will then be verified and approved by a Manager. The approval process may go through the following moderation states:

- a. Draft
- b. Ready for Publication
- c. Needs Work
- d. Published

Once a Study Summary is created, it can go through the above moderation states multiple times until it is finally approved and set to Published.



### 3.1.2 How to Create/Capture a Study Summary

To create a new Study Summary:

- a. Log in to your EVRI Account
- b. Hover over “Capture/Suggest a Study”
- c. On the drop-down menu, click on “Create a Study”

**Note:** Before you start your capture, ensure that the study you are about to capture has not been entered into the Infobase by first searching the title of the study. See section 2.3 on how to search for a study summary. Please also contact the EVRI team to verify whether the capture of a study has not already been assigned under a contract, even if the summary does not show up yet as being published.

A Study Summary is divided into six (6) data segments, represented by Tabs on the Create Study Summary Page. The six (6) data segments are;

1. Source
2. Study Area
3. Study Focus
4. Methods
5. Values
6. Abstract

#### Create Study Summary Page:

The screenshot displays the 'Create Study' form with the following elements:

- Tabs:** Source (active), Study area, Study focus, Methods, Values, Abstract.
- Title \***: A text input field.
- Document type**: A dropdown menu with '- None -' selected.
- Publication year**: A dropdown menu with '2017' selected.
- Study authors**: A rich text editor with a toolbar.
- Study source**: A rich text editor with a toolbar.
- Web link**: A text input field.
- Study file**: A file upload section with a 'Choose File' button, 'No file chosen' text, and an 'Upload' button. Below the buttons, it states: 'Files must be less than 256 MB. Allowed file types: pdf doc docx zip rar tar jar bz2.'
- Moderation state**: A dropdown menu with 'Draft (Current)' selected. Below it, a note says: 'Set the moderation state for this content.'
- Warning:** A red banner at the bottom states: 'Warning: Once a study record has been submitted for administrator review (ready for publication), it will no longer be possible to edit that record.'

The six data segments are described in more detail below.

### Writing Style, Consistency, Length, and Interpretation

An EVRI record must have a flow to it. This means that beyond having all the required elements in the fields, the record must convey a clear understanding of the environmental problem, what was done for the study, and what results were found. Clarity of this kind gives the EVRI user the ability to recognize which studies are best suited for a benefit transfer application. EVRI records are not tax records; they are a coherent description of an environmental problem and valuations related to that problem.

Text should be written in a clear and demonstrative fashion. Point form and sparsely written sentences are not to be used. Watch for coherence and transition when writing paragraphs, and avoid parenthesis or other abbreviations such as **i.e.** or **e.g.** The goal is to have each text field written so that it can be understood immediately when it is read by a high school or a first-year university student. Technical language should be simplified.

Another important point is to ensure consistency of EVRI records. For example, if we enter something in the “extent of change” field -- such as a policy that will improve water quality from boatable to swimmable -- the tables should contain values for that improvement. Or, if we say substitution effects are included in a model, then the description of the model in the record should include that variable. For some complex studies, the capturer may have to select one or two case studies from the report, or break down the report into distinct segments.

Two other style points:

- There has been a tendency for fields dealing with *Survey/study information*, *Estimated values* and the *Abstract* to get too long. Try to keep these sections to below 20 lines.
- Over the years, the best captures have been made by people who are good at the *art of summary*, the ability to condense several pages of a study into 8 or 10 sentences. Try to master this art when doing your capture.

In general, EVRI captures should be as *objective as possible*. A record should reflect what authors have said and *not* the capturer's opinion of the statements. For example, you may know that a valuation technique provides a specific Hicksian or Marshallian welfare measure, but it is simply called willingness-to-pay in the article or report. In this case, the entry should have the keyword for willingness-to-pay selected as opposed to the keyword that your judgment tells you to select. It is important that an author's mistakes or simplifications are seen by EVRI users and not screened out by the capturer.

### 3.1.3 Source

**Remember:** Do not click on “Save” until you have filled out information on all 6 stages of the capture.

**Mandatory fields are indicated with an asterisk (\*).**

Complete the following fields:

- a. Title: Write out the full title of the study and be mindful of capitalization. This is a mandatory field.

Regarding chapters in books, the *title of the chapter* is written out in full, with quotation marks around it, followed by the title of the book with no quotation marks, followed by the names of the authors written out in full. See the example below:

"Willingness to Pay to Protect Westland and Reduce Wildlife Contamination from Agricultural Drainage," in the Economics and Management of Water and Drainage in Agriculture, edited by Ariel Dinar and David Zilberman

- b. Document type: Select one from a predefined list. This is a mandatory field.
- c. Publication year: Select the year the study was published. This is a mandatory field.
- d. Study authors: Write out the name of the author(s). This is a mandatory field.
  - Please list all the authors in the same exact order they appear in the publication reference.
  - Do not use "et al." to abbreviate a long list of authors.
  - The name of the first author is entered with his/her last name first, followed by their full initials. Subsequent authors are listed with initials first, followed by their last name.

*Example 1:*

From source: Robert Cameron Mitchell, and Richard T. Carson  
Correct format: Mitchell, R.C., and R.T. Carson

*Example 2:*

From source: John B. Loomis, W. Michael Hanemann, Barbara Kanninen and Thomas Wegge  
Correct format: Loomis, J.B., W.M. Hanemann, B. Kanninen, and T. Wegge

When a study is done by an organization, such as consultancy or government department, the name of that organization should be typed into the author field.

*Example 3:*

From source: Eastern Research Group, Inc.  
Correct format for EVRI entry: Eastern Research Group, Inc.

- e. Study source:

This is a text field that describes the source of the study, such as the name of the journal article, the publisher of a book, or the name and location of a conference where a paper is presented. This is a mandatory field.

For journals, write out the name of the journal followed by its number and volume. Usually, this information is included on the title page of the journal. A common error is to include the date of the study in this field. Input the date in the next field.

For a book, type in the name and location of the publisher as follows:

*Boston: Kluwer Academic*

Below are examples of how to enter information in the study source field:

*Example 1:*

Source Type: Journal or magazine article

What to enter: Name of the journal or magazine, the journal or magazine, the journal /magazine number and volume (if available), and the page numbers of the article

*Example 2:*

Source Type: Conference Paper

What to enter: Name and location of the conference

Correct entry: Paper presented at the USDA W-133 Annual Meeting. Santa Fe, New Mexico

*Example 3:*

Source Type: Chapter in book

What to enter: Location and name of the publisher

Correct entry: Boston: Kluwer Academic

*Example 4:*

Source Type: Government or other reports

What to enter: Name and location of the organization producing the report

Correct entry: Canadian Wildlife Service, Environment Canada

*Example 5:*

Source Type: Dissertations and theses.

What to enter: Dissertation Abstracts International number (if available) and the University where the research was conducted

Correct entry: Dissertation, DAI 47, Texas A&M University

*Example 6:*

Source Type: Working paper

What to enter: Faculty/Government series number, followed by the name of the university department or government branch/directorate, then the name of the university or government department

Correct entry: Faculty Series no. 97-01, Department of Agricultural and Applied Economics, University of Georgia

- f. Web link: Provide a link to website where the study can be found. Enter the full URL.

- g. Study file: Upload the study document by
  - i. Clicking “Choose file” on the right side of the “Study File” field.
  - ii. Select the desired file from your computer; ensure it is no more than 256MB.
  - iii. You can upload files in any of these formats: pdf doc docx zip rar tar jar bz2.
  - iv. When you are done, hit “Upload”.

**Note: The Study File upload capability is only available to Managers.**

Moderation state: You can save your work as “Draft (current)” and resume capturing at a later date. This means that you have created an active draft for this capture; no other users can modify this study capture until you submit your changes for publication. If you save as “Ready for publication”, you will no longer be able to edit that capture.

### 3.1.4 Study Area

This data segment contains information about the *study area*, which includes the geographic location of the environmental problem or natural capital/asset being valued, and information about the population being sampled.

Be careful not to confuse the *study area* with the *population* researchers are sampling. To clarify, the *study area* is a specific geographic area that is the subject of the study, and it is usually defined carefully such as a particular area of wetland, lake or national park. For example, the Grand Canyon or Halifax Harbour may be the study area. By comparison, researchers may decide to choose to sample a much larger area for their study, perhaps all the citizens in a state or even an entire country. Try not to confuse the smaller study area with the geographic area (state, province) that is being sampled.

Fill out the following fields:

- a. Region: Select the geographical region, and then you will be able to select one (or more) country from the sub-menu.
- b. Location Description: This is a text field. Enter the name of the study area(s), which is usually a proper name for a geographic area. For example: *Grand Canyon National Park, Lake Winnipeg, St. Lawrence River, Hamilton Harbor*

Sometimes, the study area(s) does not have a precise name or description in the study. Do your best to describe the study area with proper geographic context. For example, if the author studied the acid rain effects on 37 lakes in Eastern Canada, input “37 lakes in Eastern Canada.”

If the study is a **meta-analysis** or a **benefits transfer** application encompassing **many sites**, this information may not be available. In this case, the field should be left blank.

- c. State/Province: This is a text field. Type in the full name of the state, province or other country division where the *study area(s)* is/are located. Report on the location of the study area, not the geographic area of the population that is being sampled. For example, in the

United States, you would type in the name of the state, while in the United Kingdom, the country is divided into counties. In France, the subdivisions are called departments. Do not use abbreviations for state, province or other country divisions. If the study site is located in more than one state or province, enter all of the states and separate them by a comma.

*Example:*

Study sites: Michigan and Wisconsin

Format for entry: Michigan, Wisconsin

- d. Availability of substitute sites: If there are any substitute sites that were mentioned in the study, enter them in this field.
- e. GIS co-ordinates: GIS (Geographic Information Systems) co-ordinates refers to the longitude and latitude lines that provide a reference for a site's geographic location.
- f. Study population characteristics: This field is used to record information about the socio-economic or demographic characteristics obtained about the study population. Hence, include census information collected by researchers and any socio-economic statistics collected as part of sampling for a survey, e.g. income, age, gender.

This field is very important, although the study author(s) may not have included this in the study. Therefore, you may have to include only general reference to the study population such as Michigan duck hunters or Winnipeg households. Try not to leave this field blank.

Socio-economic statistics are often collected if a contingent valuation survey is done, so include these statistics as they are useful for making adjustments for a benefit transfer. Make sure not to make lists when reporting these; write coherent sentences with transitions between them. Do **not** report survey information such as sample size and response rate in this field. Leave this information for the Survey/Study Information field.

*Example:*

*"The targeted study population was the general public living in the city of Vigo. Vigo is the most populated city in the region of Galicia, an area located on the northwest coast of Spain. The population density is over 2400 inhabitants/km<sup>2</sup>. The population size has increased from 8214 people in 1857 to about 400,000 people in the 1990s. Of the 448 interviewed individuals, 54% were female and the average age was just over 43. The majority of respondents were married (62%) and the average household size was just under four. 43% were educated only to primary level or less"*

### **3.1.5 Study Focus**

This category of fields describes the environmental asset being valued, the extent of environmental change being modeled, the specific environmental stressor, and the source of the stressor



a. General environmental assets

This is a mandatory field. Select one of the following: air general, animals, human, land general, man-made environment/ infrastructure, micro-organisms, plants, water general.

b. General types of goods and services valued

This is a mandatory field which provides information on environmental goods or services within a total economic value (TEV) framework, and whether a human health effect is being valued. Most natural assets such as a lake or forest have a variety of uses and non-uses. This field identifies which ones within the TEV framework are being valued in the study.

Source Study area Study focus Methods Values Abstract

**General environmental assets**

All selections

Nothing has been selected.

**General type of goods and services valued**

☐ Built environment

☐ Ecological functions

☐ Extractive uses

☐ Human health

☐ Non-extractive uses

☐ Passive uses

**Specific environmental goods and services and environmental asset**

**Extent of environmental change**

**Environmental stressor**

☐ Bio-accumulative substance

☐ Biotechnologies

☐ Climate change

☐ Congestion/crowding

☐ Infrastructure development/habitat conversion

☐ Invasive species

☐ Micro-organism

☐ Noise

☐ Non-toxic substance

☐ Persistent substance

☐ Predominantly anthropogenic substance

☐ Resource extraction

☐ Solid waste

**Specific environmental stressor**

For example, an extractive use occurs when something is taken away from the environment such as fish during fishing or a deer during hunting. A non-extractive use is where nature is enjoyed at a site, but nothing is taken away: a common example is hiking or nature viewing in a park or conservation area. Passive uses are derived from simple knowledge about a site and that it should be conserved, such as a pristine lake in northern Canada or Alaska. Ecological values are often associated with wetlands or forests. Examples include flood protection or erosion control.

- **Built Environment:** Refers to human-made surroundings constructed for human activities or to provide ecosystem services, for instance, man-made lakes created by dams, flood protection walls or water treatment facilities.
- **Ecological Functions:** These are uses to society resulting from the plant, animal, and human life support functions through maintenance of air and water quality, climate

regulation, carbon fixing, storage and recycling of organic matter and industrial water, soil fertility maintenance, groundwater recharge and filtration.

- **Extractive Uses:** These are direct uses of natural resources/materials for commercial, recreational or subsistence needs. Examples include hunting, fishing, logging, gathering and collecting specimens, pharmaceutical use of genetic material, agricultural production, textile production, leather production etc.
- **Human Health:** Human health issues relate to both morbidity (sickness) and mortality (death) effects.
- **Non-Extractive Uses:** Direct, non-extractive uses of environmental services are enjoyed by people. Examples are eco-tourism (nature safaris, whale watching, odor, visibility, visual aesthetics), visits to zoos, nature-related sports (hiking, canoeing), and vicarious uses (nature films, art, books).
- **Passive Uses:** These are non-use values such as knowledge of continued existence of natural resources (existence values), the need to leave natural resources to future generations (bequest values) and insurance value against future unknown events related to potential future uses (option values).

c. Specific environmental goods and services and environmental asset.

Use this mandatory field to enter information about the specific environmental asset, good or service **that is being valued** in the study. A few words or a sentence is all that is required. If the study is more complex, a few sentences may be required; however, please summarize the information as best you can.

d. Extent of environmental change

Use this field to enter information on the baseline and the magnitude of change being modeled or valued in the study. Baseline conditions may include such information as biophysical measures of water or air quality or parts per million of a pollutant.

For example, studies may seek to estimate the value of:

- An increase in air pollutant levels from 75 to 100 parts per million;
- A decrease in trout mortality from 150,000 to 100,000 per year;
- An improvement in water quality from boat able to swimmable;
- A decrease in reduced visibility days from 15 to 5 per year.

This is one of the most important fields in the EVRI record. It is essential to enter this field correctly, so it provides a link and is consistent with values that are later entered into the tables. Check back later to ensure that values provided in Tables “line-up” with information provided in the extent of change field.

The extent of change is handled differently, depending on the type of valuation study. For contingent valuation, the change is usually found in the elicitation question. Do your best to summarize this information.

Traditional single-site travel cost models often do not have the extent of change specified, so leave the field blank. However, in some travel cost models, a variable on water quality may be used to impute change. By comparison, discrete choice travel cost models usually have plentiful information on environmental change. If you wish, include the words “baseline” and “magnitude of change” in this field. For example, the baseline is the current condition of a lake, and the magnitude of change is an improvement in water quality to boat-able or swimmable.

e. Environmental stressor

A stressor is analogous to pollution but is a more encompassing way to define an environmental pressure or impact. For example, congestion and resource extraction may impact the environment, but are not pollution per se. Studies that value an environmental asset, such as a park or conservation area, usually do not have a stressor therefore leave this field blank.

For the field, identify the general category of environmental stressor or stressors affecting the study site or stressors whose potential impact on the value of the site is being modeled.

Only make selections from this list if the author **explicitly** identifies one or more environmental stressors in the study. Do not make any assumptions.

f. Specific environmental stressor

This is an important text field because it gives you a chance to enter some details of the type of pollution or stressor under study. Enter a few words or a short sentence to describe the stressor, such as the type of effluents or emissions. Avoid the use of abbreviations for chemical substances. Examples of environmental stressors and their corresponding category include:

Category of Stressor: Bio-accumulative Substance

Specific Stressor: Polychlorinated biphenyls

Category of Stressor: Toxic Substance

Specific Stressor: Mercury

Category of Stressor: Predominantly Anthropogenic Substance

Specific Stressor: Carbon dioxide

Category of Stressor: Solid Waste

Specific Stressor: Plastic debris

Category of Stressor: Infrastructure Development/ Habitat Conversion

Specific Stressor: Deforestation for urban expansion

Category of Stressor: Resource Extraction  
Specific Stressor: Mining

Category of Stressor: Congestion/Crowding  
Specific Stressor: London traffic

### 3.1.6 Methods

The fields in this grouping describe the methods used to conduct the study and other information, including the type of study, survey/study characteristics, available study information, year(s) of data, economic measure(s), valuation technique(s), and valuation equation/function information. These fields are described in detail below. Information about the study methods will be valuable to analysts who use EVRI to perform a benefit transfer application.

The screenshot shows the 'Methods' tab selected in a navigation bar at the top, with other tabs being 'Source', 'Study area', 'Study focus', 'Values', and 'Abstract'. The main content area is divided into several sections:

- Study type**: A list of checkboxes for 'meta/synthesis analysis', 'primary', and 'secondary/benefits transfers'.
- Survey / study information**: A text area with a rich text editor toolbar (bold, italic, underline, etc.).
- Available study information**: A list of checkboxes for 'Code book or code documentation', 'Data sets', 'Maps/pictures', 'Questionnaire/questions used', 'Risk assessment (dose-response relationships)', 'Scenarios description/classification schemes', and 'Tables'.
- Years of data**: A dropdown menu currently showing '- None -' with options for '1950', '1951', and '1952'.
- Economic measure(s)**: A list of checkboxes for 'Compensating surplus', 'Compensating variation', 'Consumer surplus', 'Cost of injury/replacement', 'Equivalent surplus', 'Equivalent variation', 'Other', 'Price', 'Willingness to accept', and 'Willingness to pay'.
- Valuation techniques**: A dropdown menu with an 'Add' button next to it. Below it, it says 'All selections' and 'Nothing has been selected.'
- Valuation Equation/Function Information**: A text area with a rich text editor toolbar.

a. Study type options are;

- **Meta/Synthesis Analysis:** a study that uses values from a large number of previous studies to construct a regression equation(s) that allows analysts to make inference. For

example, a regional variable in the equation would allow researchers to infer whether WTP was higher/lower in certain regions as compared to others.

- Primary: a study that collects original data, such as responses from a contingent valuation survey, travel cost data obtained from parks officials, or data from real estate sources for a hedonic price model.
  - Secondary/Benefits Transfers: a study that uses values from previous studies to provide estimates for a current policy. Types of benefit transfers include point transfers, average value transfers, function transfers and preference calibration.
- b. Available study information: Identify the types of following information available from the study:
- Code Book or Code Documentation
  - Data Sets
  - Maps/Pictures
  - Questionnaire/questions used
  - Risk Assessment (Dose-response Relationships)
  - Scenario Descriptions/Classification Schemes
  - Tables

Note that entries in this field should only be made if the information is in the study. As a general rule, longer reports and theses have a lot of study information and may include a questionnaire, lists of questions or detailed maps. Journal articles are summaries of studies and usually leave this information out. Only in rare cases are codebooks or data sets included in a study. Dose-response relationships are common to air quality studies, whereas tables are almost always included. In most contingent valuation studies, scenario descriptions are included.

c. Survey/study information

**Note: In the Survey /Study information field, the survey sponsor is often found in fine print on the first or last page of the journal article.**

Include all the salient details of data collection or survey administration. In many studies, there may be several pages describing data collection, which should be condensed into less than 200 words. Use complete sentences in this section and no point form. For a contingent valuation survey, include information about: the sample size, response rate, the date the survey was administered, and any other information about pre-testing and design of the survey, such as the proposed payment vehicle, whether the survey relied on a phone, mail-out or Dillman method (1978), whether scripts were used to reduce hypothetical biases, etc.

For travel-cost or hedonic price studies, information about data collection may be dispersed throughout a study. Do your best to search for this information and summarize it. The last sentence of this field should include information about the survey sponsor, such as the United States Environmental Protection Agency or Environment Canada.

d. Years of data

For contingent valuation studies, the year of data is the year the survey was administered, so look in the survey section of the study for this information. For hedonic price studies, series data are often utilized, so you will need to enter several years. For benefit transfer or meta-analysis, include the base year of the data (e.g. if values from numerous studies are averaged and adjusted to the year 2004, click that year).

You can select multiple Years of Data by holding down the CTRL key and selecting more than one year.

e. Economic Measure(s)

**Note: In the Economic measures field, select only the term the author describes, regardless of your own analysis.**

This field is mandatory. Identify the type of economic value measure that was estimated in the study. Your choices will be:

- Compensating Surplus
- Compensating Variation
- Consumers Surplus
- Cost of Injury/Replacement
- Equivalent Surplus
- Equivalent Variation
- Price
- Willingness to Accept
- Willingness to Pay
- Other

Only fill in this field with terms the author describes in the study. For example, if your own analysis suggests that the economic measure is consumer surplus -- but the author only discusses willingness-to-pay, click willingness-to-pay.



f. Valuation techniques

Identify the valuation technique(s) used in the study. If meta-analysis or benefit transfer was chosen in “Type of Study”, this field can be left blank.

Options are;

- Actual Market Pricing Method
- Revealed Preference
- Stated Preference or Simulated Market Price

g. Valuation Equation/ Function Information

This is a text field. Use this field to enter available information about the econometric equation(s) or function(s) in the study. Our experience with this field is that people enter too much information and analysis about the regression equation and its supporting statistics. This section is meant to be descriptive rather than technical. A simple description of the regression equation and its specification is all that is required.

Start this field by entering the independent variable followed by all the dependent variables. For example, “Willingness-to-pay for drinking water was modeled as a function of income, age and respondent perception of water quality.” If there are a large number of explanatory variables, refer to them in groups such as “socio-economic variables including age, income, and education.”

For travel-cost models, the dependent variable is usually the number of trips to a site. For hedonic models, the dependent variable is a measure of property values. The specification of dichotomous choice contingent valuation models in most cases is either logit or probit, and the dependent variable can be described as “The probability of answering yes to a bid amount was modeled as...”

After entering the model as above, include information about its specification such as logit, probit or quadratic. If additional information is needed to describe several similar regressions that were run or other unique circumstances, include this at the end of the field. For some studies, a regression equation is not estimated. If this is the case, leave this field blank.

**Note: For Valuation Equation, do not...**

- Add additional information about statistical testing that was done for the econometric equation such as the r-squared, t-tests or a chi-squared test.**
- Enter information about macro-models, such as Energy 2020 or CRAM. This field is for econometric equations and functions.**

### 3.1.7 Values

This category contains information on the values estimated for the study and includes a sub-module to enter values to tables. It is recommended that you enter values to the tables first before entering text into Estimated (service flow) values field.

#### a. Estimated values

This mandatory field is used to present and contextualizes the monetary values. . You may enter as much information as needed in this field. The text should present and contextualize the estimated monetary values, and make reference to which values appear in each table.

In this field, you should provide information on the currency, the year of the values, and the measured results (valuations). You may also report related statistics such as the mean and median values, ranges of values, and standard errors. You should also use this field to indicate whether the values are per annum or if they indicate a one-time payment. In addition, the denominator unit should be reflected. Examples of ways of measuring and reporting valuations include: \$/day, \$/visit, \$/trip, \$/participant, \$/unit of land, \$/unit catch, \$/unit output, \$/emergency room visit, \$/mortality, etc.

This information should be entered for each specific environmental asset valued and for each scenario change (extent of environmental change).

**Note: Sometimes, values may not be reported in monetary terms, but in percentages, such as % of annual income or residential property value.**

#### b. Discount Rate

Enter information on the discount rate(s) and the time period used in converting a stream of future benefits to a present value equivalent. Describe any sensitivity analyses performed. If the study scope encompasses only a single period (i.e. no stream of benefits), leave this field blank.

### c. Data tables


Locate values in the study or report. In most cases, values can be found in tables in the study. However, there may be several tables in a study, and it may be difficult to determine, which ones to enter. Look for monetary values and not regression results such as coefficients or t-values.

There should be an obvious link between the values entered in tables and the extent of change field if a change is modeled for the study. In some cases, the study may be examining the value of an environmental asset such as a park or wetland, and so these values will not be linked to the extent of change field. Values are often means or medians, and there may be information about sample size in the same table in the study. Aggregate values, confidence intervals and ranges may also be included in a study.

Once you have located the values and have an idea of their context, you can start setting up the table in EVRI. To create a table, follow these steps:

Write a title for your table. The trick to a good title is to include enough information so that the reader can easily understand what the table is about. This often means expanding upon information in the study. A good title should contain the following information:

- A time period for the values such as annual or monthly, for example, “Annual Willingness to Pay per Household for...;”
- A description of the study site or the name of the country where the study occurred.
- Information about the currency in parenthesis, for example: (1993 Canadian Dollars).
- General information about the environmental benefits or problem being studied.

Type in the number of columns and rows in the available fields, including the rows and columns for headings, by clicking on the table icon 

EVRI will create a table where you can input the information you have found in your study.

Write out heads for the columns and rows. The column headings are usually medium values, statistical variation of the table. The row headings are usually types of values for different categories. When entering values, ensure that you include the denomination and type of currency. If you are entering dollar amounts, put a dollar sign in front of the value (e.g. \$45), or a symbol for other currencies. For large numbers, such as \$10,000, make sure to put a comma after every thousand.

[Show row weights](#)

**Data tables**

**Table title**

Estimated Total Health and Non-Health Benefits Associated with CO2 Emission

**Table data**

	Best Estimate	Range
Health Effects	\$648	\$370-\$1,168
Materials*	\$105	\$60-\$150
Vegetation	\$1.5	\$0.9-\$2.2
Climate**	\$154	\$86-\$222

**Table notes**

\* The uncertainties are subjectively estimated to be about 40%

\*\* Most estimates of the marginal CO2 emission cost lie in the range US\$64 to US\$164 per ton C.

[Remove](#)

[Add another item](#)

Once you have finished, click on the “Add another item” button at the bottom of the grid, if you would like to add another table or Click on the next tab to continue capturing the study.

### 3.1.8 Abstract

The abstract is first and foremost a summary of the EVRI record and **not** a summary of the journal article similar to what appears at the start of the study. Journal article abstracts should never be copied and pasted in this field (due to copyrights). An EVRI abstract is actually quite easy to write, follow these steps to construct the abstract.

**Note: Before attempting to capture text to this field, read several abstracts in the EVRI database to get an idea of how they are written.**

- i. Make sure it is not too long, around 200 words or less. There is no standard way to write an abstract, but for most studies, if you are capturing the study in English, you need only include an entry in the English field.
- ii. The first two sentences should state the location, study technique, purpose of the study and the environmental stressor (when applicable). For example: “The purpose of this contingent valuation study was to estimate the benefits from improved water quality at East Lake, a recreational area in Wuhan, China. This lake is affected by daily discharges of effluents from industries and households.”
- iii. Indicate information about the survey or data collection. Make sure to include sample size and response rates if they are part of the study
- iv. Mention some important values accompanied by the extent of change. For example, “The annual willingness-to-pay for improving water quality from boat able to swimmable ranged \$30 to \$50, depending on whether protest bids were included.”

- v. Include aggregate values (regional, national) if they are calculated. Never make any assumptions, aggregate values or estimate mean values on your own; only include them if they are in the study.
- vi. Mention the year and type of currency, written out in full and enclosed in parenthesis, only the first time dollar values are used in the abstract, for example: (1995 Canadian Dollars).
- vii. Close with a strong conclusion of the study, for example, "...measures to reduce water pollution in the lake should be undertaken, but not up to the highest drinkable quality level."
- viii. The last sentence should provide information about the study sponsor, such as the United States Environmental Protection Agency.

### 3.2 How to Suggest a New Study to be Added to EVRI

In the event you do not want to create and capture a study yourself, you can suggest one to be added by a Manager.

- a. Login to your Account.
- b. On the home page, from the menu bar, select "Capture/Suggest a Study".
- c. Select "Suggest a Study" from the drop-down menu.

- d. Complete all fields on the screen.

Enter the email title: This is the email subject line. This should be in this format

*"Re: Suggest a study - Title of Study"*

- e. Enter Description: Give a brief explanation of why you want this study to be included in the Infobase, highlight the main facets of the study, and add an hyperlink if you are not able to upload an electronic copy of the study.

- f. Add attachments: Include the e-copy of the study and any other supporting material in the formats listed.
- g. Click Submit.

An email will be sent to the System Administrator.

### 3.3 How to Suggest Changes to an Existing Study Summary

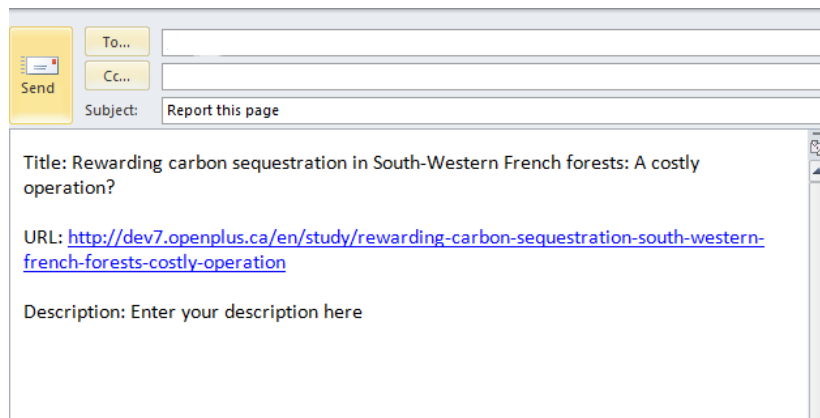
There are two ways to suggest changes to a Study Summary.

- I. Use the “Report this Page” button
- II. Make edits directly in Draft mode

#### 3.3.1 Report this Page

To provide suggestions for changes, comments or text additions on a Study Summary using the “Report this Page” function, follow these steps:

- a. From the Home or Search page, search for the Study Summary that you would like to suggest changes to.
- b. Click on the hyperlink of the Study Summary. You will be taken to the Study Summary Details.
- c. Click on the “Report this Page” blue button. You will be redirected to send an email.



The screenshot shows an email composition interface. On the left is a yellow 'Send' button. To its right are three input fields: 'To...' (empty), 'Cc...' (empty), and 'Subject:' (containing 'Report this page'). Below these fields is a large text area. The first line of the text area is 'Title: Rewarding carbon sequestration in South-Western French forests: A costly operation?'. The second line is 'URL: <http://dev7.openplus.ca/en/study/rewarding-carbon-sequestration-south-western-french-forests-costly-operation>'. The third line is 'Description: Enter your description here'. A vertical scrollbar is visible on the right side of the text area.

- d. Type in your comments below the line **Description: Enter your description here** text in the email body.
- e. Click Send.

Your email will be sent to the System Administrator.



### 3.3.2 Make Edits Directly in Draft Mode

To make edits directly in Draft mode, follow these steps:

- From the Home or Search page, search for the study that you would like to suggest changes to.
- Click on the hyperlink of the Study Summary. You will be taken to the Study Summary page (see image below).
- At the top of the Study Summary page, click on the “New Draft” tab.

The screenshot shows the 'Edit Study' interface for a study titled 'Consumers' Willingness to Pay for Eco-Friendly Apples under Different Labels: Evidences from a Lab Experiment'. At the top, there are tabs for 'View published' and 'New draft', with 'New draft' being the active tab. Below this is a breadcrumb trail: 'Source' > 'Study area' > 'Study focus' > 'Methods' > 'Values' > 'Abstract', with 'Source' being the active tab. The form contains several fields: 'Title' (pre-filled with the study title), 'Document type' (a dropdown menu set to 'Journal'), 'Publication year' (a dropdown menu set to '2012'), 'Study authors' (a text area containing 'Marette, S. A. Messéan and G. Millet'), 'Study source' (a text area containing 'Food Policy 37, pp. 151-161'), 'Web link' (an empty text field), and 'Study file' (a file upload section with a 'Choose File' button, 'No file chosen' text, and an 'Upload' button). Below these fields is a 'Moderation state' dropdown menu set to 'Ready for publication'. At the bottom, there is a red warning message: 'Warning: Once a study record has been submitted for administrator review (ready for publication), it will no longer be possible to edit that record'.

- Make any text changes to any data segment and or field. All changes will be tracked and can be compared with the previous version.

**Note:** Do not click on Save until all changes have been done.

- Once all changes have been made click the green “Save” button, change the moderation state to “Ready for Publication” and it will be sent to a Manager for review.
- Once submitted, your study will not be visible until approved by a Manager and published or until it is sent back for further changes, with the Moderation State set to **Needs More Work**. In this case, the Manager may have entered notes in the Moderation Notes field, and he may have made edits within the body of the Study Summary.

### 3.4 How to modify a Study Summary, if returned by a Manager

A Manager may return a Study Summary for many different reasons, in order to prepare it to be published on the EVRI website.

If a Study Summary is returned for further changes, you will receive an email notification, informing you of the section(s) that you have to modify. See sample email below.

- a. Follow the link and make the necessary changes.
- b. Save as “Ready for Publication” and it will remain in a pending status until a Manager approves it, or return it for more changes.

**Your study submission requires revision**

Sent: Thu 7/27/2017 4:23 PM

To:

---

Your submission on the following study requires revision: [sample study](#).

The moderator has left the following comment:

Edited by ~

Please go to your dashboard at your convenience to address the aforementioned issue(s): [\\_](#)

Thank-you.