# Actions Batch Upload Handout

Version: 6/09/2021

## Useful Links

ATTAINS User Interface (To login to Production ATTAINS): https://attains.epa.gov/attains/login

The ATTAINS Public Website contains background information:
https://www.epa.gov/waterdata/attains

- The ATTAINS Upload Data page provides various resources and instruction documents for registered ATTAINS users: https://www.epa.gov/waterdata/upload-data-resources-registered-attains-users

- This training session provides information on how to enter a TMDL in ATTAINS. If you would like additional resources, please see the "Actions Module" section of the ATTAINS public website's Upload Data page: https://www.epa.gov/waterdata/upload-data-resources-registered-attains-users#actions-module

## Actions Batch Upload Templates

- For the latest Batch Upload Templates, please see this page:
  https://www.epa.gov/waterdata/upload-data-resources-registered-attains-users#batch-upload-templates
  - There are separate templates for TMDLs versus Non-TMDL Actions because they have different required data fields.
    - **For TMDLs, use the "TMDL Action Batch Upload Template."**
    - For Non-TMDLs (4B plans, Alternative Restoration Plans, and Protection Approach Plans), use the "Non-TMDL Action Batch Upload Template".

  - You can also get to the latest Batch Upload templates from within the ATTAINS User Interface: In ATTAINS → Actions Module → Menu → Upload Actions. Then, click the "here" link in the blue banner under Upload Actions. That will take you to the ATTAINS Public Website, and then you can go to the Upload Data page → Batch Upload Templates.
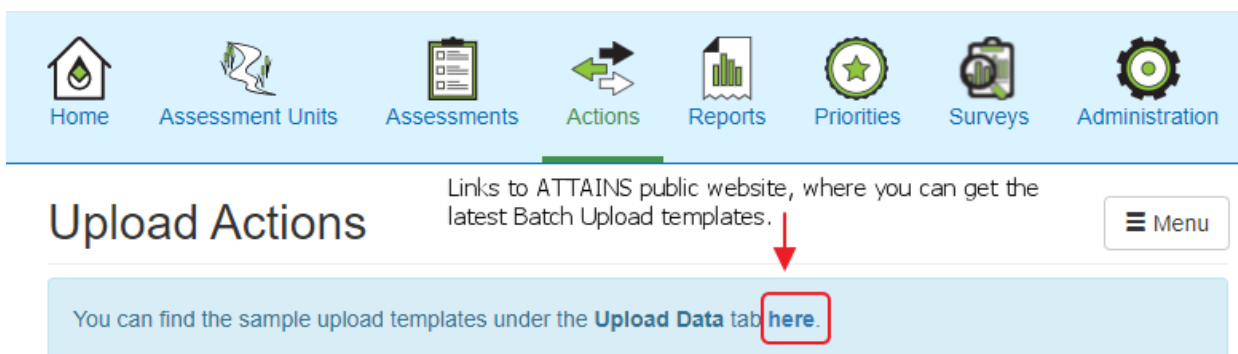


## Important Notes

- Actions Batch Upload can only be used to upload **Actions in "Draft" Status**. (You cannot use Actions Batch Upload with "Submitted", "Modify" or "EPA Final Action" status.)
  - The Export Actions functionality combines TMDLs and Non-TMDLs in the same files. It will also include Actions from all Statuses. However, you can only re-upload "Draft" status Actions.
- **Assessment Unit IDs must already exist** for the Organization before they can be used in the TMDL Batch Upload Template.

# How to Batch Upload TMDL Actions

If you are entering or editing smaller Actions, then making edits directly in the User Interface is easier because the User Interface forms walk you through which data elements go in each field. (Refer to the PowerPoint and other instruction documents for how to enter a TMDL in the User Interface). However, if you are entering or editing a lot of data, and you are familiar with the Actions data structure, then Batch Upload may be easier.

1. Download a copy of the latest **TMDL Action Batch Upload template** and save it locally.
2. If necessary, update the domain values to the latest values: in the Excel ribbon → Data tab → Refresh All. (Note: This step is only necessary if you're expecting new domain values that are missing from the Batch Upload Template.)
3. Populate the Excel TMDL Action Batch Upload Template or the respective .CSV files with the appropriate data.
   a. The TMDL Batch Upload Template has an Instruction tab, a Data Dictionary tab, and an Export tab. It also has several blue data entry tabs, and several green domain value (a.k.a., allowed value) tabs.
      i. At a minimum, you will need the Actions, Pollutant and Parameter tabs. The Permits, Load Allocation and Source tabs are conditionally required, as indicated in the Data Dictionary.
   b. The columns are color coded for Required, Conditionally Required and Optional columns. The Data Dictionary (and notes in the column names on the data entry tabs) explain when to populate Conditionally Required columns.
   c. The column names on data entry tabs link to the appropriate column on the respective domain tab to show the allowed values. Users with Office 365 can also utilize in-cell drop-down lists for some domain values.
4. The Export tab will create the appropriate .CSV files. You must enable content for the Export macros to work.
   a. By default, it saves the .CSV to the same folder where the template is saved. **Note:** If you already have a file with the same name in that folder (Actions.csv, Load_Allocations.csv, Parameters.csv, Permits.csv, Pollutants.csv, Sources.csv), the new file will overwrite the old file without warning.
5. In ATTAINS, go to the Actions module → Menu → Upload Actions.
6. Decide between using Update Versus Replace
   a. There are 2 options for Actions Batch Upload.
      i. **Update:** The Update option allows you to add new Actions, add or append data to existing Actions and edit data in some data fields. It does not delete any existing data.
      ii. **Replace:** The Replace option deletes existing data for any Action IDs in the files and replaces it with ONLY the data in the files being uploaded. (It will also create new Actions for any new Action IDs in the files.)

**Example of Update Versus Replace**

| Type of Batch Upload | Batch Upload Files Contain | Existing Data Before Upload | Data After Upload |
|---|---|---|---|
| **Update** | Action_01 has 2 Pollutants: "TOTAL SUSPENDED SOLIDS (TSS)" and "ESCHERICHIA COLI (E. COLI)". | Action_01 has 1 Pollutant: "FECAL COLIFORM" | Action_01 has **3 Pollutants** (the existing pollutant plus the two new pollutants): "FECAL COLIFORM", "TOTAL SUSPENDED SOLIDS (TSS)" and "ESCHERICHIA COLI (E. COLI)" |
| **Replace** | Action_01 has 2 Pollutants: "TOTAL SUSPENDED SOLIDS (TSS)" and "ESCHERICHIA COLI (E. COLI)". | Action_01 has 1 Pollutant: "FECAL COLIFORM" | Action_01 has **2 Pollutants** (only the two new pollutants): "TOTAL SUSPENDED SOLIDS (TSS)" and "ESCHERICHIA COLI (E. COLI)" |

7. Load the appropriate files.
    a. For Update, you can load all the files at once, or load smaller combinations of files.  The Instructions tab explains which files must be uploaded together.
        i. If you have any errors, you can start with just the actions.csv file and then add individual files, to help pinpoint the file containing the errors.
    b. For Replace, you must upload all the appropriate files simultaneously.
8. Start the file validation process.  View and **download the processing report**.  Note:  This is the only chance you will have to download that report.
9. If there are no Error messages, you may Proceed with the upload.
10. You can check the Actions that you uploaded to verify that the content saved as you expected.  If you notice a mistake, you can go back to your Batch Upload files and fix the underlying issue.  Then, go through the Batch Upload again.
11. You must go into the User Interface to upload the TMDL report.  (You cannot upload a report document through a Comma Separated Value .CSV batch upload file.)
    a. Remember to use a Public-friendly name for the document, because it will show up in How's My Waterway after the TMDL has been approved and finalized in ATTAINS.
12. When you are ready, you can Submit the TMDL.  To submit:  In the Actions module, open the relevant Action ID (if it is not already open).  Go to the Summary tab.  Then, go to the Menu button and select Submit.