

Actions Batch Upload Handout

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Useful Links

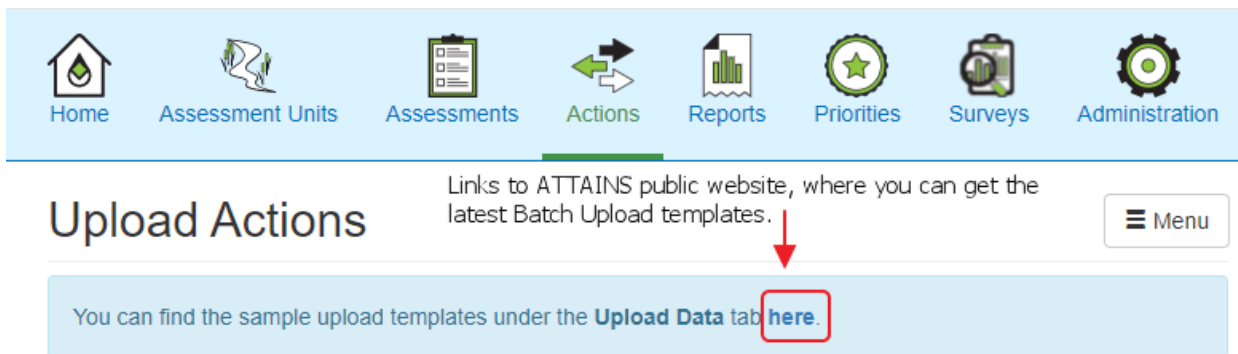
ATTAINS User Interface (To login to Production ATTAINS): <https://attains.epa.gov/attains/login>

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 an Action 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 the following page. The templates are updated periodically: <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 tabs and required data fields.
 - **“TMDL Action Batch Upload Template”**: For TMDLs only.
 - **“Non-TMDL Action Batch Upload Template”**: For 4B Plans, Alternative Restoration Plans, and Protection Approach Plans.
 - You can also link 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

- The Export Actions functionality combines TMDLs and Non-TMDLs in the same files. Some columns and files apply to TMDLs that do not apply to Non-TMDL Actions. The Export will also include Actions from all Statuses.
- For State/Territory/Tribal Users: Actions Batch Upload can only be used to upload Actions in “Draft” Status.
- For EPA Users: Actions Batch Upload can be used to Upload Actions in “Draft”, “Submitted” (a.k.a., “State Final Action”), or “Modify” status. However, you **cannot** use Batch Upload to change the status of an Action.
- **Assessment Unit IDs must already exist** for the Organization before they can be used in an Actions Batch Upload Template.

Which Data Entry Option to Use

There are several options you can use for adding or editing Action data in ATTAINS. The recommended option depends on what you need to do, and how much data you need to add or edit.

What You Want to Do	Recommended Option
Add one new Action or edit a couple of things on an existing Action	Use the forms in the User Interface. It walks you through the data elements that are needed and gives you faster feedback as you make the edits.
Add New Actions (generally for multiple new Actions or lots of data for a single Action)	Use the appropriate Batch Upload template (TMDL Action or Non-TMDL Action). The Batch Upload template works best when you are entering lots of similar data from scratch.
Edit Existing Actions (generally if you need to edit more than a few things on an Existing Action, or need to edit multiple Existing Actions at one time)	<p>Filter the Actions module for the Actions you want to edit. Export Filtered Actions. (It is best to filter for one specific type of Action at a time.) Save a copy of the export files as a backup (or keep the downloaded zip file as a backup). Then edit the export files, and re-upload those.</p> <p>In this situation, do not copy and paste the existing data to the Batch Upload template, because you may mis-copy data. Instead, just edit the export file, and use the Batch Upload Template as a reference to see the required fields and the allowed domain values.</p>

How to Batch Upload Actions

If you choose to use Batch Upload, you will need a copy of the appropriate Batch Upload Template. It is an important reference, whether you enter data into the template, or edit an Export file.

1. Download a copy of the latest **Action Batch Upload template** (TMDL or Non-TMDL) 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 or Non-TMDL Action Batch Upload Template or the respective exported .CSV files with the appropriate data.
 - a. The Batch Upload Template has an Instruction tab, a Template Version History 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. **For TMDL Actions:** At a minimum, you will need the Actions, Pollutant and Parameter tabs. The Permit tab is conditionally required, as indicated in the Data Dictionary. The Load Allocation and Source tabs are optional.
 - ii. **For Non-TMDL Actions:** At a minimum, you will need the Actions and Parameter tabs. The Source tab is optional.
 - 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 in the table 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. (The drop-down lists use Excel’s SORT and UNIQUE functions, which are not available in earlier versions of Excel. However, the “name”, “code”, and “context” columns on the green Domain tabs should be populated and available to users of Excel 2016 or newer.)

4. The Export tab in the Batch Upload Template 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 (i.e., Actions.csv, Load_Allocation.csv, Parameter.csv, Permit.csv, Pollutant.csv, Source.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 or append data to existing Actions and edit data in some data fields.

1. The Update option lets you upload individual files instead of requiring all the files.
 2. However, **when editing existing data, Optional fields are only Optional if they were previously empty.** If they were previously populated, and you want to keep that data, you must include them in the upload. Otherwise, ATTAINS will overwrite the existing data (that are missing from your upload files) with blanks.

- ii. **Replace:** The Replace option deletes all the existing data for any Action IDs in the files and replaces it with ONLY the data in the files being uploaded.

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 (i.e., required files and any populated optional files). Failure to include a file will delete the corresponding data from ATTAINS, and it may result in additional Errors or Warnings, due to expected data from the missing 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 now 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 now has 2 Pollutants (only the two new pollutants): “TOTAL SUSPENDED SOLIDS (TSS)” and “ESCHERICHIA COLI (E. COLI)” Replace deletes the existing pollutant of “FECAL COLIFORM” because it wasn’t in the upload file.

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 you have Error messages, you must resolve them before proceeding.
10. If there are no Error messages, you may Proceed with the upload. (If you have Warnings, you can fix them now, or continue the upload but you must resolve the issues before you Submit or Finalize the Action.)
11. **Note:** When uploading lots of data, check your Batch Upload periodically. An ATTAINS session will timeout after 30 minutes of inactivity. The timeout clock is suspended during the validation phase of Batch Upload. It is also suspended during the Save phase of Batch Upload. However, you could time out between the validation and saving phases, if you leave ATTAINS unattended for too long between the end of the Validation and the start of the Saving phases. Clicking anywhere in the whitespace of the ATTAINS User Interface should reset the timeout clock.
12. 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.
13. 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 (exactly as uploaded) after the TMDL has been approved and finalized in ATTAINS. Also, make sure the document does not have "Draft" watermarks, etc.
14. When you are ready, you can Submit the TMDL to EPA. 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.

EPA Users

In addition to the Batch Upload capabilities outlined above, EPA users have some additional options.

15. EPA users may Batch Upload "Draft" status Actions, as outlined above. EPA Users may also review and edit Submitted (a.k.a., "State Final Action" status) or "Modify" status Actions, via the User Interface or Batch Upload. However, **Batch Upload cannot be used to change the status of the Action**. Changes to Action Status must be managed within the User Interface.
16. EPA users must enter a finalization date, before Approving a TMDL Action. For TMDLs, that is the "TMDL Date (Approved/Established)", and it found on the General tab of the Action. (For Non-TMDL Actions, the system adds the date based on when you Accepted the Action.)
17. EPA Actions Reviewers can Approve/Accept submitted Actions or Return the Action to the Organization.
18. EPA Actions Reviewers may also take a previously finalized TMDL Action and put it into "Modify" status to make some edits to it. Once in "Modify" status, either an EPA Actions Administrator or Actions Reviewer may edit it. They may not change the Action ID or delete an existing document. When finished, they must re-finalize the Action. Actions in "Modify" status are not visible to the public. Therefore, it is important to re-finalize the Action quickly. ("Modify" status is currently not available for non-TMDL Actions.)