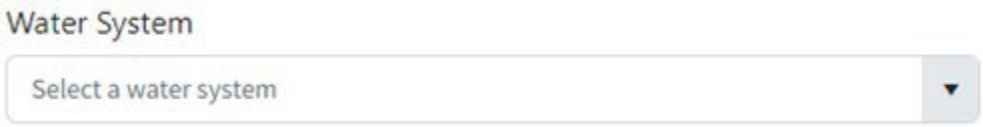
Lead Service Line Inventory Instructions from GEC Zendesk

View/Edit/Remove Updates

1. To select the water system, click the Water System dropdown arrow or start typing the water system ID or name.

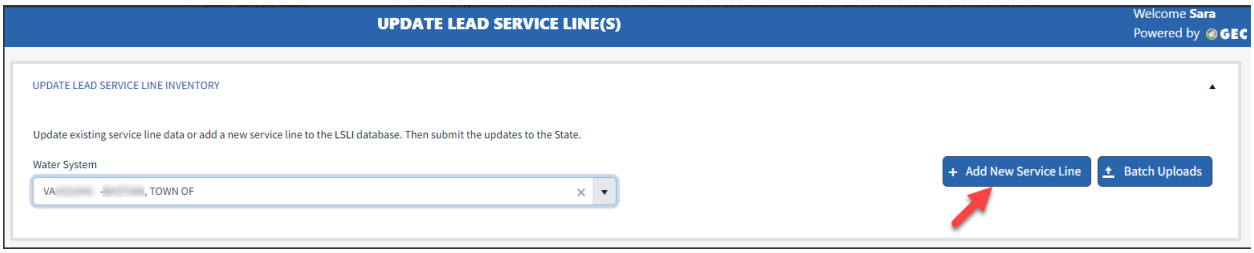


2. Once the water system is chosen, the user can View Changes, Edit, and Remove service lines under the Actions column.

3. The page also contains search boxes that allow the user to search for a specific service line using those filter options.

<u>Adding a New Service Line(s)</u>

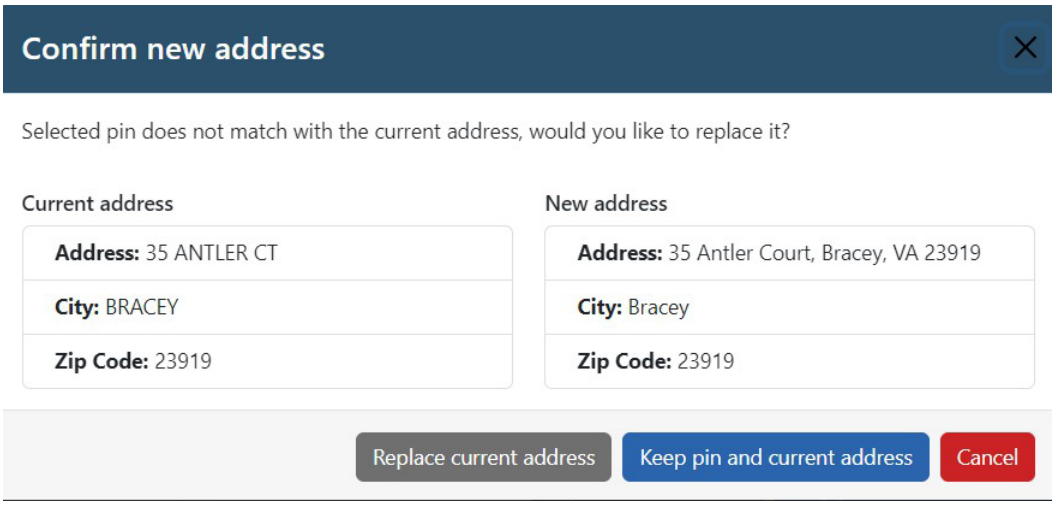
1. Choose a Water System
2. Click on the "Add New Service Line" button at the top of the page on the right



3. Fill in the required information (marked with *) and any other information available to input.
    - To open a section in the webform, click on the title box for the section and it will open.
    - Clicking the button on any field will provide information about that field.
    - For the Location field, it is important for the user to enter a mappable location.
        - To use the location entry box, type in the address and as it is being typed, suggestions will appear, click the one that matches the

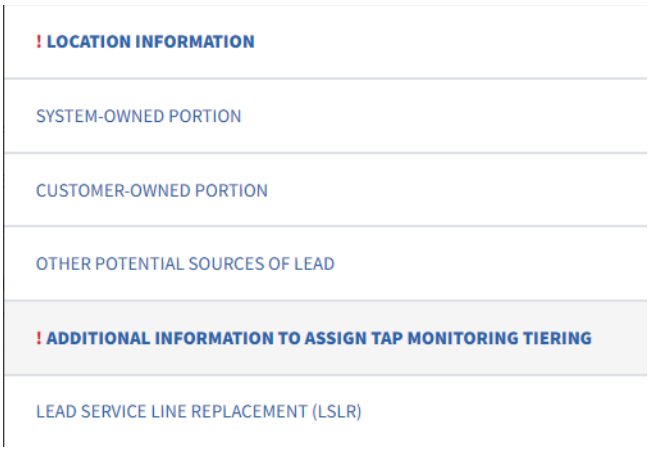
address being typed in. (Once one has been selected, the map will update with a pin to indicate the address and will use the coordinates that correspond to it)

- If there is no match for the address entered, use the typed address and drop the pin on the map where the address is located. Another method is to type in a similar address that is close to the original and change the pinpoint to the correct location before finalizing the true address.
- If the map does not have an exact address to match the pinpoint, a pop-up will appear that will allow the user to keep the pin and address to what was manually set to or replace the address to the suggested.



4. Click "**Replace current address**", "**Keep pin and current address**", or "**Cancel**"
5. Click "**Save**"
6. Click “Go Back to Inventory”

**When there is a required field missing after clicking "Save" button, an error message will appear. To indicate where the missing fields are, the section title will be bolded and there will be a red exclamation point next to the section name.*



Batch Upload

The batch upload page is where a user can go if they need to upload more than one service line to one water system.

**The Excel template used for the batch upload is downloaded on this page and depending on the type of water system that the user selects, the corresponding excel template will be downloaded.*

1. Choose a Water System
2. Click "Batch Uploads"
3. Click "Download Excel Template"
4. Fill in the required fields and any other information available
5. Click "Upload from Excel File"

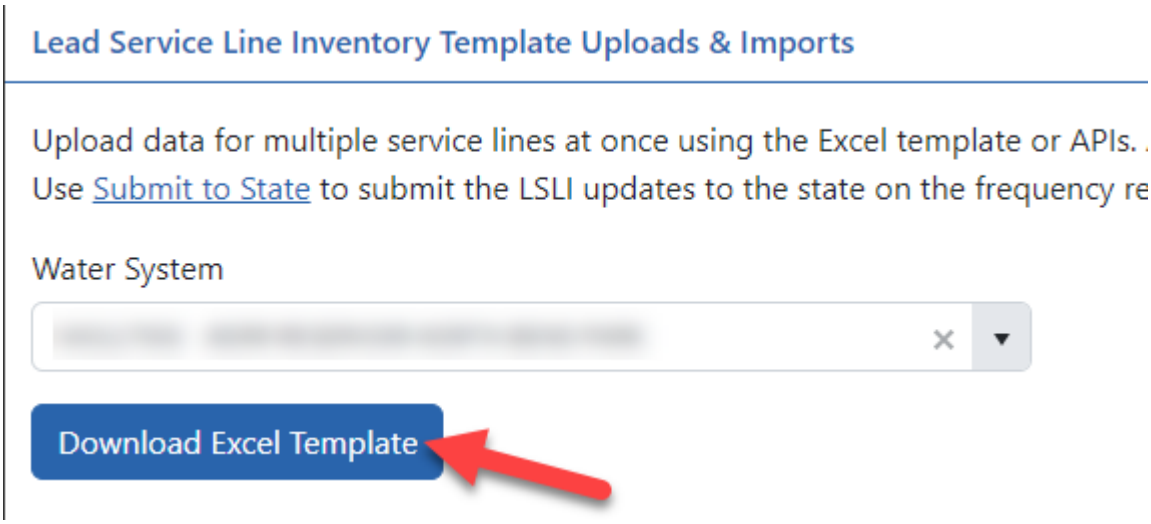
**Depending on how many service lines are on the excel template, it may take longer to upload.*

**An email will be sent to the user when the upload has been completed and is ready for review.*

Once the file is uploaded, it will appear on the File Uploads list on the Batch Uploads page. The user must then review and import the data for it to be added to the Lead Service Line

Inventory. The user can also download the original upload files and view past uploads. The Upload Status column indicates whether the upload is ready for review or has already been processed with data imported into the Lead Service Line Inventory.

** If the Upload Status column says "Invalid File," the file is not in the proper template (e.g., different column order, column names, etc.). Download the correct template from the Batch Uploads page.*



** If the Upload Status column says "Processing Error," this usually means there are duplicates among the Unique Service Line IDs. Each Service Line ID must be unique within the file and the same one cannot be listed more than once.*

Review & Import

Although a file has been uploaded, it does not become part of the Lead Service Line Inventory until it has been reviewed for errors and imported into the Inventory database.

1. To review a service line that has been uploaded, click the "**Review**" button in the Actions column. for that service line. This will take the user to the "Review Upload File" page for this water system.
    - The Status column indicates whether the service line record is:
        - Invalid: Has errors that need to be corrected before the data can be imported
        - Valid: Ready to be imported
2. Click "**Delete**" under the Actions column to delete that service line record and import the rest of the service lines without it. **To delete the entire upload, click the "**Discard Upload**" button at the bottom of the "Review Upload File" page.*

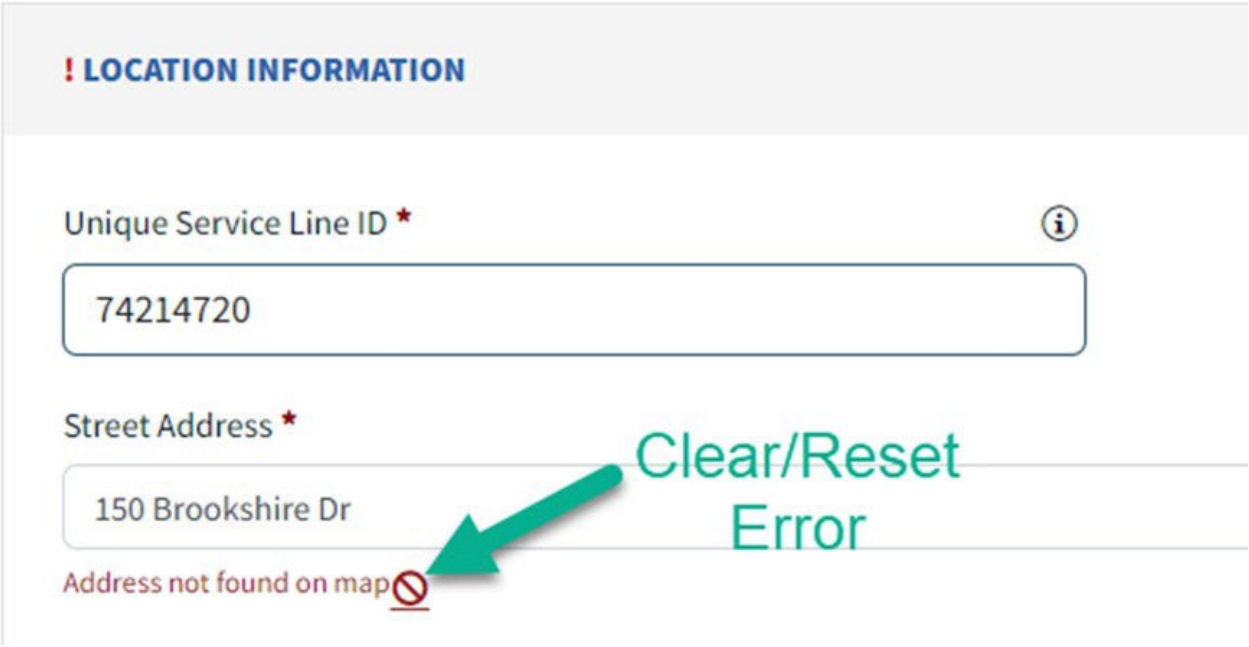
3. Click "**Edit**" under the Actions column to edit the service line information and correct errors.
4. Once editing is completed, click the "**Save**" button and return to the Review Upload File page.
5. When all the records have a "Valid" status, the service lines can be imported into the Lead Service Line Inventory by clicking the "**Import Information**" button.

Upload Tips

To avoid upload errors, prepare your Lead Service Line Inventory file using the following tips:

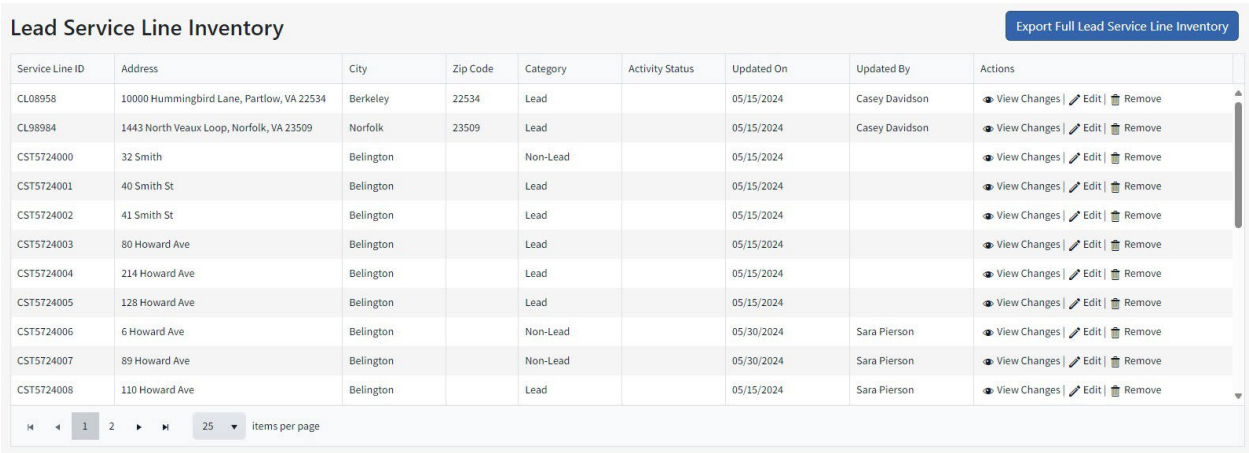
1. Make sure you are using the proper Template for the state. Columns and drop-down values must be an exact match. Use the "**Download Excel Template**" button on the top left of the Uploads page to get the current template.
2. Make sure all required fields have been filled in. Required fields have bolded text and an asterisk (*) and are typically a different color (e.g., light blue).
    - The Service Line ID field is required. Make sure this data is not too long as there is a 50-character max. Avoid special characters – only letters, numbers, apostrophes, hyphens, and periods are allowed at this time.
    - Some fields are Conditionally Required, meaning depending on the value selected, linked non-required fields can become required. For example, if "Other" is selected for a field, the "Notes" field for that section may become required to explain further. **This will be state-specific, so be sure to consult with your state lead on Submittals to discuss field requirements.*
3. Avoid address errors. The address geocoding tool will flag an address error for the user to review and confirm if it finds more than one possible address match. To help the tool narrow down options to just one match, try the following tips:
    - Spell out words whenever possible:
        - Replace "E" with "East", "N." with "North", etc.
        - Replace "Blvd" and "Blvd." with "Boulevard", "Rd" and "Rd." with "Road", etc.
        - To find and replace abbreviated words in a file with many Service Line entries:

        - "Ctrl +F", then select the "Replace" tab, or select the "Find and Replace" button towards the top of the page in the Excel "Home" tab.
        - Enter in the update (Replace Ct with Court) and "Replace All." This will allow the user to replace abbreviations in an efficient manner which can drastically reduce location errors.
    - Include City, State, and Zip as much as possible.
    - Avoid including Apt #'s, Suites, and other information typically listed on a second address line. If the full address is listed first including city/state/zip before listing the Apartment # or similar, the address mapping tool may be able to process it better.
    - Include latitude and longitude (in decimal degrees). The address geocoding/mapping tool only runs to generate latitude and longitude data points for the service line. If latitude and longitude are already provided, it will not run and you will not receive any errors related to the geocoding tool. If your state does not have those columns as part of the LSLI upload template, you can add two columns to the end: "Latitude" and "Longitude."
    - If you do have address errors to review, you can change the address and/or location map pin independently, or keep the address and pin as shown. When you move the map pin, a pop-up may suggest a possible new address; you can use the suggested replacement or keep your address as is. When you are satisfied with the address and pin location, clear the error and click "**Save**."



Viewing Lead Service Line Inventory (LSLI)

1. Click on the "Update Service Line(s)" option in the menu
2. Select a system from the dropdown at the top
3. Scroll to the bottom of the page - all inventory will be displayed for the selected system
4. Click the "Export Full Lead Service Line Inventory" button to initiate an email with all information



5. A modal will appear - click the "Export All" button

Export Full Lead Service Line Inventory

X

The Lead Service Line Inventory Export will be prepared and sent to email:·seth.corbin@1gec.com'

Cancel

Export All