Provincial Stream Crossing Inventory System (PSCIS) User Guide

July, 2011

Overview

In short, the PSCSIS data submission process works as follows:

- User sets up their 'PSCIS work area'...link
  - User saves a copy of the excel data capture template into the root of their 'PSCIS work area'
  - User sets up a 'sub folder' within work area to support an assessment, remediation or design submission
  - Users adds supporting data (i.e. photos, report, overview maps) into the respective 'sub folder'.
- Whether it be an assessment, remediation or design proposal, the process is largely the same
- Data is entered into the spreadsheet template
  There is an excel template for each of assessment, remediation or design proposals. This guide outlines submission of an assessment project, but the process is essentially the same for each project type. The exception is that for design proposals or remediations, a submitter will need to supply the PSCIS_Crossing_ID for each record entered.
  NOTE: Multiple assessments, remediations or design proposals can go on their respective templates but submission types cannot be mixed i.e. the assessment template cannot be used to submit details of remediations.
- Data is uploaded into the PSCIS system by completing the [Generate Submission] process, including:
  - Submission validation and completion
  - Uploading spreadsheet data (XML)
  - Uploading supporting data (typically photos)

Warning

It should be noted that the excel spreadsheet contains various **macros and code** that rely on the spreadsheet being setup in a certain way. Macros must be turned on in order for the built-in data validation to work. It is recognised that despite best efforts, spreadsheets can be manipulated in a number of ways such as renaming and reordering and even inserting fields amongst other things. We would request that you not tamper with the spreadsheet at a structural level and not seek to 'customize' it in any way and simply use it for data entry / submission purposes in the manner described below.
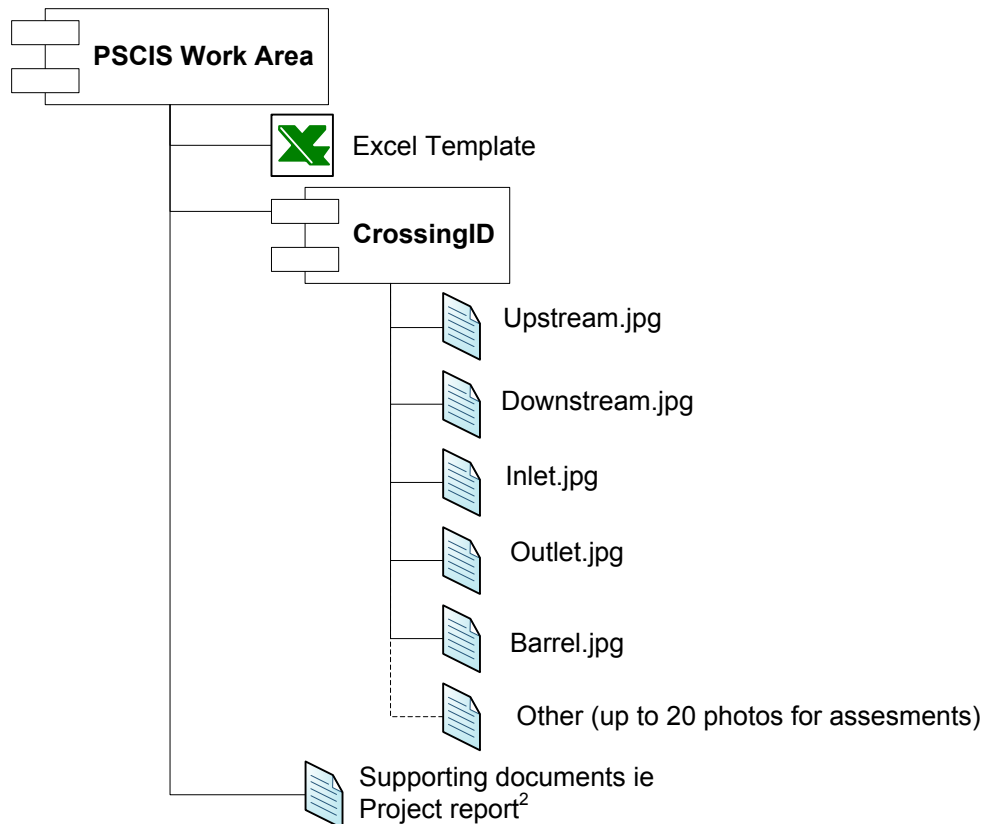
Users may make multiple submissions using multiple spreadsheets – all of the data for a project does not have to be entered at once. In fact, if your project contains more than 200 records, you should break it up into more manageable chunks so as not to overload the system. The database will be able to summarize all of the data for a given Project ID.

Setting up your PSCIS work area

Your PSCIS work area can be anywhere on your PC. Avoid using a networked drive - zipping files can be sluggish over a network.

The work area should contain files and folders in a specific way and to meet specific naming standards in order to pass ' validation', specifically:

PSCIS Work Area

Excel Template

CrossingID

Upstream.jpg

Downstream.jpg

Inlet.jpg

Outlet.jpg

Barrel.jpg

Other (up to 20 photos for assesments)

Supporting documents ie
Project report[2]

[1] Each Work area and the excel template can facilitate the submission of multiple 'assessments', 'redmediations' or 'designs'. Each would require it's own assesment folder
NOTE: submission types cannot be mixed ie an excel template cannot be used to submit 'assessments' AND 'remediations'

[2] Project report is:
    -optional for 'Assesments'
    -mandatory for 'Designs' and 'Remediations'

Entering Raw Data	top

1. Open the Excel template that you've copied into your PSCIS working directory
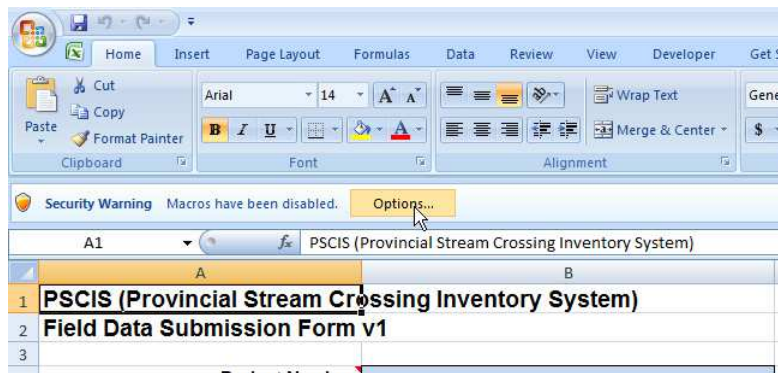
   If prompted, be sure to **ENABLE MACROS** by clicking [Options]
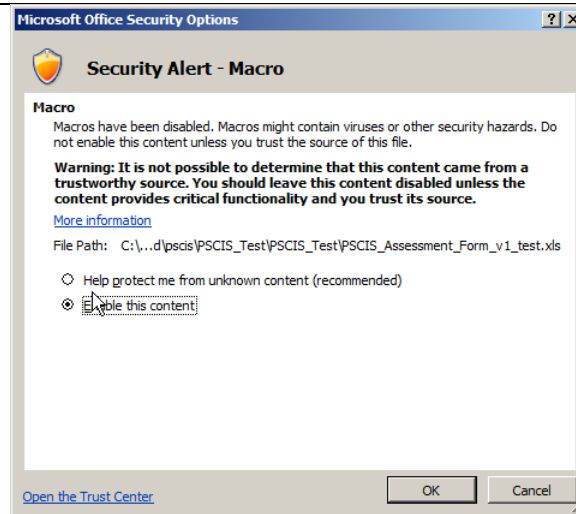
2. Select [Enable Content]

   Click [OK]

3. Complete the [Cover Page]

4. Open the [PSCIS Assessment Worksheet]

   For each assessment, enter the data in a separate row.
   Do not skip any rows. Any data entered below a skipped row will not be validated or submitted.

Preparing Support Data (typically photos)	top

5. Once completed, the spreadsheet should contain a number of rows, each representing the assessment of a different stream crossing.

    As described previously, each row / assessment / stream crossing should have a corresponding sub folder within the PSCIS working folder- with precisely the same name as the matching [My Crossing Reference] field.

    This sub folder should contain mandatory as well as any additional supporting data for the given row / assessment – typically photos.

    This can be seen in the example below where:

    -   An assessment of [Crossing 3] has been carried out
    -   The location of the PSCIS working Directory can be seen – [c:\users\matbrand\PSCSWorkingDir]
    -   The PSCIS working directory contains sub folders that contain supporting data for each of the assesments documented in the excel file – in this case for Crossing 1, Crossing 2, Crossing 3 and Crossing 4.
    -   In the example below, the [Crossing 3] sub folder has been opened to show that it contains the minimum 5 photos – [Barrel], [Downstream], [Inlet], [Outlet],[Upstream].

Validating Data
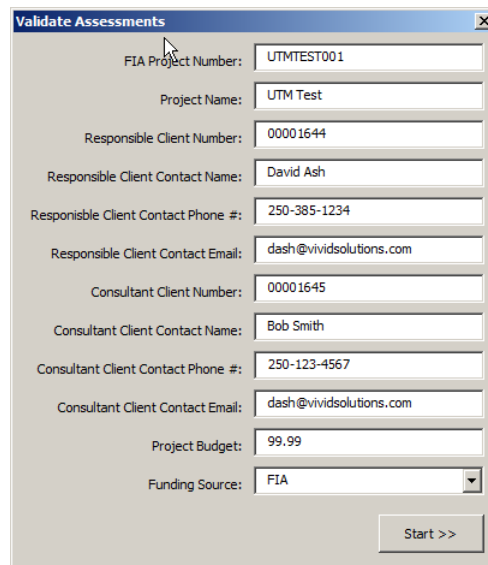
6. When you are happy that you have completed the excel template and that the required supporting sub folders are in place within the working folder , the next step is to use the functionality built in to the spreadsheet to validate your data prior to submission.

7. Click [Validate Assessment] as shown below
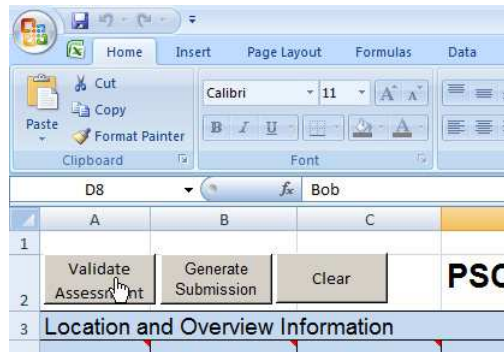
8. The data entered into the [Cover Page] worksheet will be summarised in a form where it can be checked and corrected / edited if required.

   When you are happy to proceed, click [Start]

9. Once the validation is complete, you will be presented with one of two scenarios:
   a. All data were successfully validated. Simply click [OK] on the dialog below and proceed to [Generate Submission] when ready.
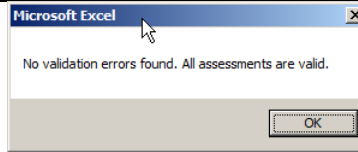
b. If validation is not passed, you will see something like:
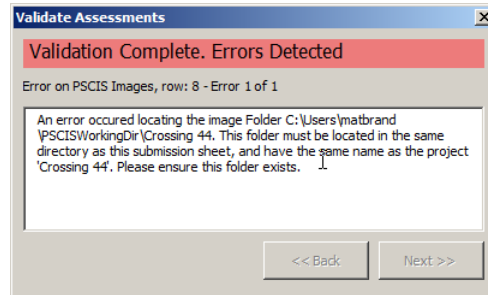
The issue will be summarized for you.

If there are multiple issues, they can be 'navigated] by clicking [back] or [next]

To correct any mistakes, click [x] to go back to the spreadsheet and make changes as required.

All the issues captured by the validation process are also summarized in the [errors] worksheet

Once corrections have been made, click [validate assessment] again and ensure that all issues are resolved prior to proceeding to [Generate Submission]

Making a submission	

10. Once you have successfully validated your excel workbook, you can proceed to submit the data into the PSCIS system.

   This requires the completion of a number of steps whereby the system will 'package' up (zip up) the contents of your PSCIS working directory and will then walk you through a series of steps that will require you to identify where certain files are- much like when you complete a tax return.

Uploading supporting data (typically photos)

11. Begin by clicking [generate submission]
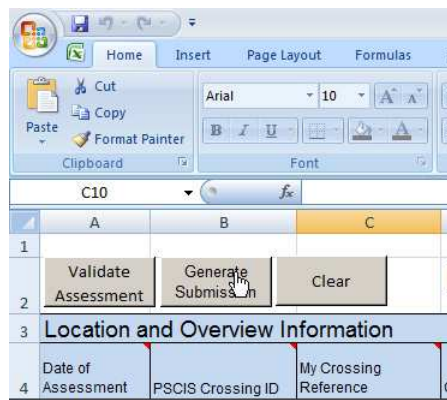
12. Click [next]
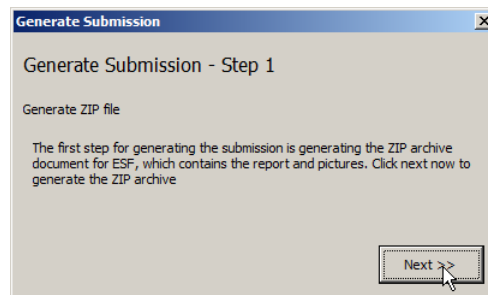
13. The system will then begin the process of preparing your submission for loading
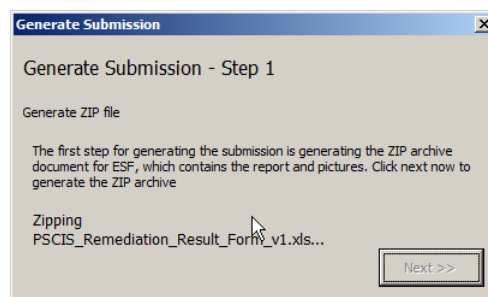
14. Once completed, a new folder inside of your [PSCIS working folder] will have been created called [pscis_zip].

Within [pscis_zip] will be a zip file named to match your [project number] as defined on your [cover page] worksheet.

In the example below the newly created pscis_zip folder is located at:

C:\Users\matbrand\PSCISWorkingDir\pscis_zip

The zip file within the pscis_zip folder is called PSCIS_PROJECT_UTMTEST001.zip, the [project number] being UTMTEST001- as defined on the [cover page]
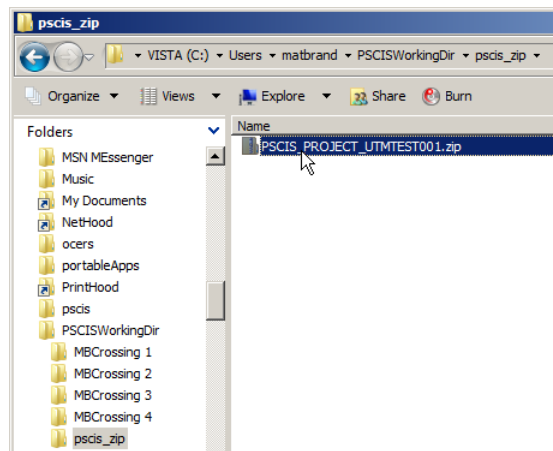
15. You are now required to upload the zip file into the PSCIS system using the SOFT tool.

Once the zip process is complete, you will be presented with the dialogue below.

Click [Open Soft] to open SOFT tool within your default web browser.
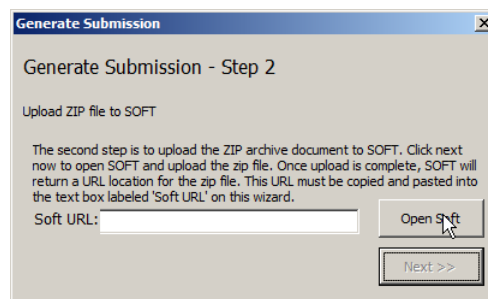
16. Click [Browse] when you see the SOFT web page

17. Navigate to the location of your zip file and select the zip file itself.

In the previous example –

C:\Users\matbrand\PSCISWorkingDir\pscis_zip\ PSCIS_PROJECT_UTMTEST001.zip

Click [open]
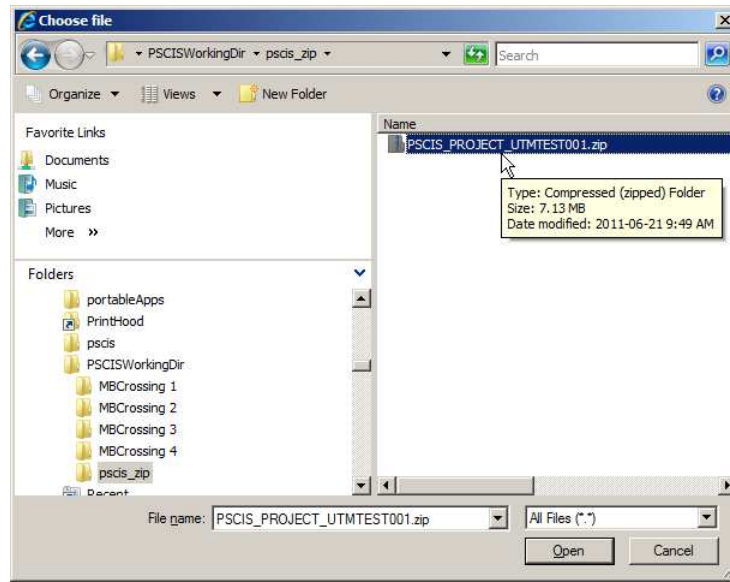
18. The path of the zip file will be returned into the [File To Upload] field

Click [Upload File]

19. SOFT will then upload your zip file

20. Once the upload is complete (may take some time for larger zip files), you will be presented with a confirmation screen similar to the below.

Select the path (location) of the newly uploaded zip file by selecting the path and:

right clicking and selecting [copy], or

pressing [ctrl & c]

21. Return to your excel spreadsheet and in the [Soft URL] field paste the path that you copied from SOFT by:

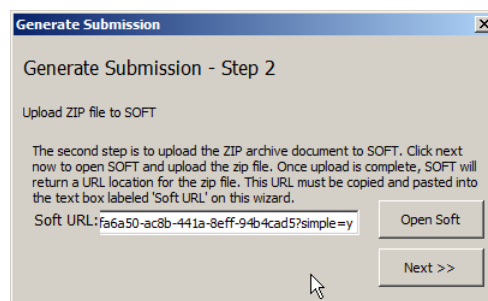Placing the cursor in the [Soft URL] text box

Press [ctrl & V].

In the example below, the path has been pasted in:

http://www.env.gov.bc.ca/perl/soft/dl.pl/20110621100050-07-gp-9ffa6a50-ac8b-441a-8eff-94b4cad5?simple=y

Click [Next]

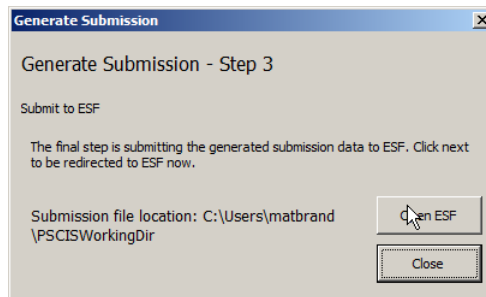At this point, you have successfully uploaded your data sheet and supporting files (photos, report, overview maps) into the PSCIS system The final step is to submit the data entered into the spreadsheet in XML format.

The XML conversion is handled automatically by the functionality coded into the spreadsheet and simply requires you to see out the balance of the [Generate Submission] steps as described below

Uploading spreadsheet data (XML)

22. To finalize your submission, click [Open ESF]

Generate Submission

Generate Submission - Step 3

Submit to ESF

The final step is submitting the generated submission data to ESF. Click next to be redirected to ESF now.

Submission file location: C:\Users\matbrand \PSCISWorkingDir

[Open ESF]

[Close]

23. If required, login using your IDIR or BCEID credentials

BRITISH COLUMBIA

Help ?

Logon

testapps18.for.gov.bc.ca requires you to logon.

Internal Government User (IDIR)

[BCeID User]

Username: matbrand

Password: •••••••••

» Contact Us

[Next]

Access to or unauthorized use of data on this computer system by any person other than the authorized employee(s) or owner(s) of an account is strictly prohibited and may result in legal action against such person.

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24. Click [Upload submission]

25. From the [Choose submission type] combo, select the[PSCIS – Provincial Stream Crossing] option

26. Enter a meaningful user reference that will help you identify which submission this is should you need to track it within the system.

Click [Browse] to indicate the location of your XML fiel to the system.

27. Note: The XML file is created automatically by the [Generate Submission] process and resides in the same directory as the excel spreadsheet / the PSCIS working folder as can be seen below.

Selct the [pscis_submission.xml] file and click [open].

28. Click [Upload submission]

Electronic Submission - Upload Submission
Organization: BC Government
User: Matt Brandwood

Upload Submission

* Choose Submission Type: PSCIS - Provincial Stream Crossing Submission

User Reference: MB Refense

* Browse or Enter Submission File: C:\Users\matbrand\pscis\PSCIS_Test\PSCIS_Test\psci   Browse...

* Mandatory Fields.

Upload Submission
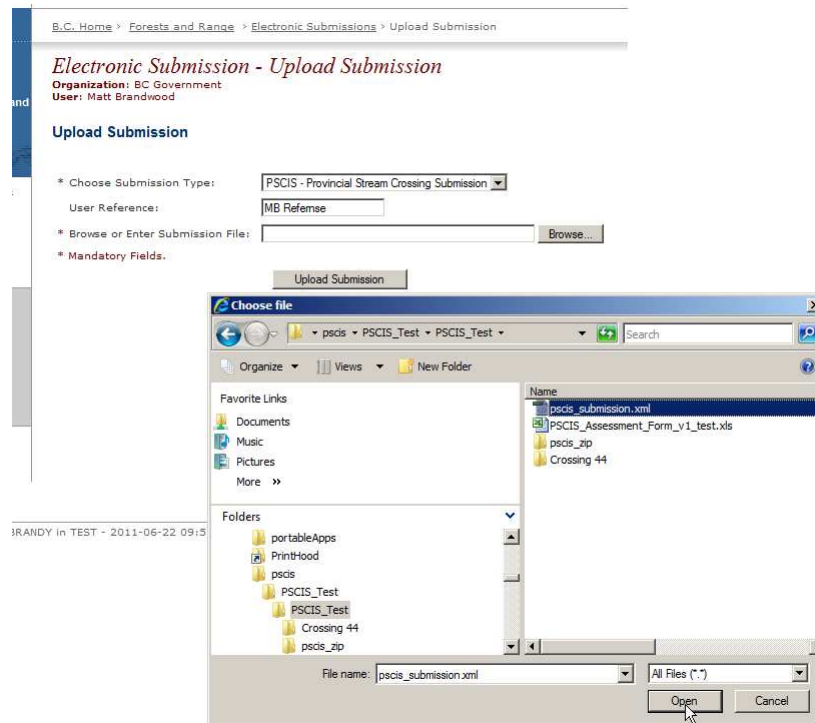
Submission validation and completion

29. The submission will first be validated by the system.

    In the event of any errors they will be dispayed similar to the below. .
    To correct issues, return to the excel spreadsheet and make amendments as required
    before returning to step 6.

30. Upon successfull valdiation you will receive the following message.

To complete the submission, simply click [Finalize Submission]. Make sure you select the email address that you would like notifications to go to.

31. You will then receive the following confirmation mesage at which point your submission will begin working its way through the system. Your submitted data should be viewable within PSCIS <link> a day after the submission processing is completed.

PSCIS High Level Work Flow

22 June 2011

USER	SYSTEM	USER

1: Create PSCIS Work Folder and enter data
- enter data into spreadsheet and copy photos into appropriate subfolders, having named them appropriately

2: Generate Submission
- submission is packaged up into the format required for the PSCIS system

3. Submit ZIP file via SOFT
- tell SOFT where the ZIP file is
- record SOFT URL for photos and enter into excel dialogues
- upload ZIP

4: Submit XML via ESF
- tell ESF where the XML file is
- upload XML

5: Finalize
- Submission enters queue

6: Data loaded
- data loaded to operational database
- photos copied to web server

7: Data replication
- data replicated across to warehouse

8: Data viewable in IMAP

NOTES:
Excel template exists for each submission type:
 - assessment
 - design proposal
 - remediation
Templates contain extensive code / logic to support data validation as well as file manipulation

NOTES:
SOFT: Simple Obfuscated File Transfer- Pre existing utility for uploading / sharing files which is leveraged as part of the PSCIS workflow

NOTES:
ESF: Electronic Submission Framework – Pre existing utility for loading XML data which is leveraged as part of the PSCIS workflow