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# EQuIS Data Processor Guidance Manual

Information Support Services Information Management Bureau Central Services Division

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7/31/2023 Page 2 of 17 Version: 1.1

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	Document History			
Revision #	<b>Revision Date</b>	Revised By	Notes	
1.0	3/3/2021	Jolene McQuillan	Initial document for general EDP manual	
1.1	4/6/2021	Jolene McQuillan	Added info for EQEDD download page	
1.2	7/31/2023	Jolene McQuillan	Updated DEQ webpage links	

# **1.0 EQuIS Data Processor Overview**

The purpose of this guidance manual is to provide instructions on how to use the EQUIS Data Processor (EDP). The EDP is a standalone application that must be used by data providers to check their electronic data deliverable (EDD) files prior to submission to the Montana EQUIS database. The EDP performs a series of formatting checks on the EDD and then identifies any records that have errors. The EDP checks data for the following:

- Required Fields
- Field Length
- Data Types
- Valid Reference Values
- Duplicate Rows
- Range Checking
- Record Parent-Child Relationships

If errors are detected, the application allows the data provider to correct the errors directly in EDP. After all errors have been corrected, the EDP must be re-run to ensure that no errors remain. EDD files that pass through the EDP error-free should also result in an error-free import into the Montana EQuIS database. The EDP does not compare the data in the EDD to the data in the database, so it is possible to receive an error when submitting to Montana EQuIS if the data in your EDD conflicts with data in the database.

# 2.0 EDP Installation

To use the EDP application, the following three steps must be completed in the order shown:

- 1. Download and install the EDP application
- 2. Download the appropriate EDD format
- 3. Register the EDD format

# 2.1 Download and Install the EDP Application

The download page for the EDP application is associated to the EDD format you will be using. This guidance manual will use the MT-WMRD EDD as an example, but be sure to start from the webpage that corresponds to the EDD you are required to use.

- MT-WMRD EDD: <u>https://earthsoft.com/products/edp/edp-wmrd-format-for-mtdeq/</u>
  - Montana Waste Management and Remediation Division EDD
  - MT-WMRD Support webpage: <u>https://deq.mt.gov/cleanupandrec/resources</u>
  - MTDEQ\_WQX (MT-eWQX): https://earthsoft.com/products/edp/edp-format-for-mtdeq/
    - Montana EQuIS Water Quality Exchange EDD
      - MT-eWQX Support webpage: <u>https://deq.mt.gov/water/Programs/sw</u>
- MTDEQ EQEDD: <u>https://earthsoft.com/products/edp/edp-format-for-mtdeq-eqedd/</u>

   Montana DEQ EQEDD (standard EQUIS EQEDD with Montana reference values)

**NOTE:** These instructions are specific to the Chrome web browser. Steps may vary with other Chrome settings or when using other web browsers.

From the appropriate EDP/EDD Download page:

- 1. Click the correct EDP download link, either '32 bit (x86)' or '64 bit (x64)'.
  - a. To determine if your computer requires x32 or x64 bit, open your Start menu, select 'Settings' (gear icon), select 'System', and select 'About'. The system type should indicate if it's a 32 or 64-bit operating system.

 EDP Version 7.20.2

 32 bit (x86) | 64 bit (x64)

MT-WMRD Format (ZIP) (EDP v7.x)

MT-WMRD Format Valid Values (RVF)

2. The .zip EDP file will be downloaded to your computer. In the lower left corner, select 'Show in folder'.

1	now to accentifien you any
	Open
	Always open files of this type
	Show in folder
	Cancel
EDP_7.20.2_installezip	~

3. When you have located the downloaded .zip file, right-click on the file, select 'Properties', and check 'Unblock' if it's available. Select 'OK' to exit the file properties window.

EDP_7.20.2	_installer_x64.zip Properties X
General Secu	rity Details Previous Versions
	EDP_7.20.2_installer_x64.zip
Type of file:	Compressed (zipped) Folder (.zip)
Opens with:	Windows Explorer Change
Location:	C:\Users\cb0169\Downloads
Size:	51.5 MB (54,039,898 bytes)
Size on disk:	51.5 MB (54,042,624 bytes)
Created:	Monday, March 1, 2021, 1:34:41 PM
Modified:	Monday, March 1, 2021, 1:34:45 PM
Accessed:	Today, March 1, 2021, 6 minutes ago
Attributes:	Read-only Hidden Advanced
Security:	This file came from another computer and might be blocked to help protect this computer.
	OK Cancel Apply

- 4. Right-click on the .zip file and select 'Extract All'. Save the files to a location on your computer.
- 5. Double-click the .exe file that was extracted to start the install.

Name



6. The installation wizard will launch. Click 'Next'.

t	EarthSoft EQuIS EDP Standalone Setup	_		$\times$
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Welcome to the EarthSoft EQuIS EDP Standalone Setup Wizard

The Setup Wizard will install EarthSoft EQUIS EDP Standalone on your computer. Click Next to continue or Cancel to exit the Setup Wizard.



- 7. The License Agreement screen will appear. Select the 'I accept the terms in the license agreement' checkbox and click 'Next'.
- 8. On the Custom Setup screen, select 'Next', no changes are needed.
- 9. Select 'Install'. The install will run and when complete, select 'Finish'.

HearthSoft EQuIS EDP Stand	alone Setup	_		$\times$
	Completed the EarthSoft I Standalone Setup Wizard	EQuIS	EDP	
EQUIS	Click the Finish button to exit the Setu	ıp Wizaro	ł.	



## 2.2 Download the EDD Format

From the appropriate EDP/EDD Download page:

1. Click the 'MT-WMRD Format (ZIP) (EDP v7.x)' link to start the download.



MT-WMRD Format Valid Values (RVF)

2. The .zip EDD file will be downloaded to your computer. In the lower left corner, select 'Show in folder'.

	Open
	Always open files of this type
	Show in folder
	Cancel
MT-WMRD.zip	~

3. When you have located the downloaded .zip file, right-click on the file, select 'Properties', and check 'Unblock' if it's available. Select 'OK' to exit the file properties window.

MT-WMRD	.zip Properties		
General Secu	Inity Details Previous Versions		
	MT-WMRD.zip		
Type of file:	Compressed (zipped) Folder (.zip)		
Opens with:	Hindows Explorer Change		
Location:	C:\Users\cb0169\Downloads		
Size:	372 KB (381,866 bytes)		
Size on disk:	376 KB (385,024 bytes)		
Created:	Monday, March 1, 2021, 2:23:17 PM		
Modified:	Monday, March 1, 2021, 2:24:30 PM		
Accessed:	Today, March 1, 2021, 2 minutes ago		
Attributes:	Read-only Hidden Advanced		
Security:	This file came from another computer and might be blocked to help protect this computer.		
	OK Cancel Apply		

Right-click on the .zip file and select 'Extract All'. Save the files to a location on your computer.

 After extracting, it is recommended to move the unzipped EDD folder to your EDP application folder: C:\Program Files\EarthSoft\EDP\Formats

Name	Date modified	Туре	Size	
MT-WMRD.dll	2/8/2021 8:40 AM	DLL File	53 KB	
MT-WMRD.rvf	2/8/2021 8:39 AM	RVF File	1,016 KB	
MT-WMRD.xml	2/8/2021 8:40 AM	XML Document	17 KB	
MT-WMRD.xse	2/8/2021 8:40 AM	XSE File	457 KB	
MT-WMRD-enum.xml	2/8/2021 8:40 AM	XML Document	29 KB	

#### 2.2.1 Download the Valid Values/Reference Values (if needed)

The .zip file downloaded in Section 2.2 contains all the required files to run the EDD. Most of the EDD files are not updated frequently, but the valid value/reference value file is often updated monthly (file extension: .rvf). If you have previously downloaded the EDD format, but want the most up-to-date .rvf file, download the latest .rvf and replace the original in your EDD format folder.

## EDP Version 7.20.2

```
32 bit (x86) | 64 bit (x64)
```

MT-WMRD Format (ZIP) (EDP v7.x)

MT-WMRD Format Valid Values (RVF)

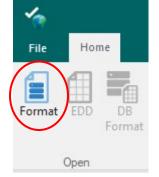
# 2.3 Register the EDD Format

Once the EDP application is downloaded and installed, and the EDD is downloaded, the EDD format must be registered.

1. Open the EQuIS EDP Standalone application.

E		
	EarthSoft New	
	EQuIS EDP Standalone	
	EQuIS EDP Standalone 32bit New	

2. <u>The EDP main screen will open</u>. Click the 'Format' button from the Home Ribbon.



- 3. Browse to the folder where the EDD format files were saved in Section 2.2 (C:\Program Files\EarthSoft\EDP\Formats). Select the .xse format file and click 'Open'.
- 4. The EDD Evaluation screen will appear the first time you open a format. Click the 'Register' button.

Evaluation	$\times$
MTWMRD Please register - EQuIS licensing is required but missing or not accessible. Review the EarthSoft Software Registration information and use the links	
By dicking on 'Next' or 'Register' below, you accept the following liability waiver:	
Until registered by purchasing a registration key, this software is an evaluation license only. A such, the entire risk as to the results of performance of the software is assumed by you. Neither EarthSoft, Inc. nor anyone else who has been involved in the creation, production, or delivery of this product shall be liable for any direct, indirect, consequential, or incidental damages (including damages or loss of business profits, business interruption, loss of business information, and the like) arising out of the use of or inability to use such product even if EarthSoft, Inc. has been advised of the possibility of such damages. Because some states do not allow the exclusion or limitation of liability for consequential or incidental damage, the abov limitation may not apply to you.You must request an evaluation key from EarthSoft Inc. Please click the link below.or email Help Desk at support@earthsoft.com and include ComputerId=3133785310 in the message body.	'e
To obtain an evaluation key, visit:	
http://earthsoft.com/support/registration/	
Register Next > Cancel	

5. In the Software Registration window, select the 'Workstation Licenses' tab and then click the link directly under the New Key Codes box: 'Click <u>here</u> to request registration key for this computer.'

🔐 Software Regis	tration		$\times$
	ration status of products currently installed on this 00169\AppData\Roaming\EarthSoft\EQuIS.exe.config	computer.	
Activation Worksta	ation Licenses   SPLA		
	Maintenance key not found		
Computer ID:	3133785310		-
New Key Codes:			
New Key Codes:		Save Key(s)	
	Click here to request registration key for this computer		
	Click <u>here</u> to request maintenance extension		
	ОК		

- 6. An internet window will open for `EDP Format for MT-WMRD Registration'. Confirm the registration page is for the EDD format you want to register. Enter the requested information. The Computer ID field should automatically be populated from the EDP Software Registration screen. Select `Submit'
  - a. The registration keys you will receive are associated with your Computer ID, so if you change computers, you will need to request new keys for your EDD formats.

EDP Format for MT-WMRD Registration

DEQ	ntana Department of nvironmental Quality
To request software (fields in red are requ	registration keys, please provide the following information ired):
Contact Name:	
Company:	
Address (Physical):	
City:	
State:	
Zip Code:	
Country:	
Phone Number:	
Email Address:	
Computer ID*:	
	*Note that this request form is for local workstation Computer IDs only. To purchase the format for network licensing, please contact support@earthsoft.com.
Comment:	Please indicate if you are registering a new license, re-registering an existing license, moving a license from an old machine to a new machine, etc.
Submit Clear	

- 7. After the registration form is submitted, you should receive a confirmation email indicating your request is being processed. Keys will be emailed to you, typically within 48 hours. If you have not received your keys in 2 business days, email <u>MontanaEQuIS@mt.gov</u>.
- 8. Copy the keys from the email and paste them into the 'New Key Codes' field in the Workstation Licenses tab on the Software Registration window. If you closed out of EDP while waiting for the keys to arrive, follow steps 1-5 above to return to the Software Registration window.

🔐 Software Regis	tration	>	<
-	ration status of products currently installed on 0169\AppData\Roaming\EarthSoft\EQuIS.exe.config	this computer.	
Activation Worksta	tion Licenses Network Licenses SPLA		
<		:	>
	Maintenance key not found		
Computer ID:	3133785310		
New Key Codes:	FTEFA-LKETJ-MRKC4-RN8VC FDE9D-Q862J-M0C09-UH8FC	Save Key(s)	
	7		
	Click here to request registration key for this comp	uter	
	Click <u>here</u> to request maintenance extension		
	ок		

- 9. After the keys have been entered, select 'Save Key(s)'. A screen stating that the registration succeeded should appear, select 'OK' and select 'OK' again to exit the Software Registration screen.
- 10. The EDD format is now registered to your computer and ready to use. To start using EDP, click the 'Format' button from the Home Ribbon and browse to the folder where the EDD format files were saved in Section 2.2 (C:\Program Files\EarthSoft\EDP\Formats). Select the .xse format file and click 'Open'.

# 3.0 Using EDP

# 3.1 EDP Main Window

The EDP main window contains all the tools you will need to load, review, and update your EDD file.

File Home		EQuIS Data Processor		- 🗆 X
Format EDD DB Format Log	CommentRows CommentRows Filter Column(s) Fort Size: Column Chooser	Add New Row Copy Row(s) Set as Comment Row	- A↓ - Sort Blank EDD →	rrmat File <b>?</b>
Open Error Log	View any code company_type company_nam	Data Data e contact_name license_nbr address_1	Tools address_2 city county	Help
Costativevider v1     Gostativevider v1     Gostativevider v1     Gostativevider v1     Gostativevider     Gostativevider		4		
V_BuildingInspection_v1 V_TaskParameters_v1 U_Samples_v1 Bab Sample_v1 FestResultQC_v1 Batch_v1				

#### 1) File Menu

The file menu has options to:

- Save an EDD
- Sign & Submit
- Register EDD formats

#### 2) Sections of the EDD Format

The left pane contains the sections of the EDD format. These correspond to the worksheets in the Excel version of the EDD. Once an EDD is loaded, clicking on each section will bring up the associated data.

#### 3) Home Ribbon

The Home Ribbon stretches across the EDP window and has options to:

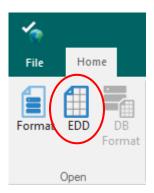
- Open a Format, EDD, Error Log, or EDD Summary
- Turn comment rows off
- Select to display only rows with errors
- Turn column filters on or off and pin columns
- Add a new row to an EDD section
- Clear data from an entire table, an entire EDD, or an entire data package
- Refresh data in a selected row, table, or everything
- Find and replace text
- Sort columns ascending or descending
- Open a new blank EDD or open a description of the EDD

#### 4) Data

The main portion of the window is devoted to displaying the data associated with each section of the EDD. At the top of the data portion are column headers which have tool tips. To access these tool tips, simply hold your mouse over the column header name. The tool tips give a brief description of the field and include information about field length and whether a field is required, conditional, or optional.

# 3.2 Loading EDD Files

1. Click the 'EDD' button in the Home Ribbon. A format must be loaded before the EDD button will be available.



- 2. Browse to the EDD to be loaded and select 'Open'.
  - a. EDDs saved as Excel and zip files created from EDP can be opened this way.
  - b. To open EDD worksheets saved as text files, do not select the 'EDD' button. Right-click on the worksheet name in the left pane and select 'Load Data File'.
- 3. EDP will load the file. Data checking is a background process that occurs while the EDD is being loaded. The amount of time it takes the EDD to load will depend on several factors including the EDD format being used and the number of records in the EDD. Once the file is loaded, the data can be displayed by selecting the sections in the left pane. Sections with errors, or warnings, will have red text and sections with no errors will be green.

ormat EDD DB Format Log	mmary	CommentRo	ows T Filter Column Pin Column Column Choos	n(s) 🗄 Copy			· Ž♥ · [	Blank EDD 👻 🔐 D EDD Description Generate Format File	esign Format File	?
Open Error	Log		View		Da			Tools		Help
Initial					Rows: 28 of 28 [Con	nment Rows, Errors Only	d			
Subfacility v1	Line	data_provider	sys sample code	sample_name	sample_matrix_code	sample_type_code	sample_source		sample_date	sys_loc_cod
Location_v1	30	KJC	D1-AIR-10-15-18	D1-AIR-10-15-18	AE	FD	FIELD	GAC-MID-A-20181015	10/15/2018 2:30:0	
SubfacilityLocation_v1	31	KJC	D2-AIR-02-23-18	D2-AIR-02-23-18	AE	FD	FIELD	GAC-MID-B-20180223	2/23/2018 11:50:0	
COC v1	32	KJC	D2-AIR-03-19-18	D2-Air-03-19-18	AE	FD	FIELD	GAC-MID-B-20180319	3/19/2018 3:00:00	
SDG_v1	33	KJC	D2-AIR-05-16-18	D2-AIR-05-16-18		FD	FIELD	GAC-MID-B-20180516	5/16/2018 2:45:00	
Equipment_v1	34	KJC	D2-AIR-06-18-18	D2-AIR-06-18-18	AE	FD	FIELD	GAC-MID-B-20180618	6/18/2018 4:00:00	
EquipmentParameter_v1 Files v1	35	KJC	D2-AIR-07-18-18	D2-AIR-07-18-18	AE	FD	FIELD	GAC-MID-B-20180718	7/18/2018 3:00:00	
Field	36	KJC	D2-AIR-08-13-08	D2-AIR-08-13-08	AE	FD	FIELD	GAC MID-B-20180813	8/13/2018 4:30:00	
DrillActivity_v1	37	KJC	D2-AIR-10-15-18	D2-AIR-10-15-18	AE	FD	FIELD	GAC-MID-B-20181015	10/15/2018 2:45:0	
DownholePoint_v1	38	KJC	DI-AIR-02-23-18	DI-AIR-02-23-18	AE	FD	FIELD	GAC-MID-A-20180223	2/23/2018 3:00:00	
Well v1	257	KJC	D1-GW-10-02-18	D1-GW-10-02-18	WG	FD	FIELD	L-88-12(20181002)	10/2/2018 9:05:00	L-88-12
WellConstruction_v1	259	KJC	D1-GW-11-19-18	D1-GW-11-19-18	WG	FD	FIELD	15-9D(20181119)	11/19/2018 11:45:	15-9D
WaterLevel_v1	260	KJC	D1-GW-12-12-18	D1-GW-12-12-18	WG	FD	FIELD	15-9D(20181212)	12/12/2018 9:55:0	15-9D
WaterTable_v1 ExtractionInjectionWells v	275	KJC	D1-GW-09-05-18	D1-GW-09-05-18	WG	N	FIELD	HALLETT MW-1-20180	9/5/2018 6:15:00	HALLETT MV
FieldSample v1	278	KJC	7L01(20180606)	7L01(20180606)	WP	N	FIELD		6/6/2018 2:35:00	7L01
FieldResults_v1	279	KJC	7P17(20180605)	7P17(20180605)	WP	N	FIELD		6/5/2018 9:20:00	7P17
Vapor Intrusion	280	KJC	7Q01(20180605)	7Q01(20180605)	WP	N	FIELD		6/5/2018 9:30:00	7Q01
VI_BuildingInspection_v1 VI_TaskParameters_v1	281	KJC	D-1(20180604)	D-1(20180604)	WG	FD	FIELD	PMW-5(20180604)	6/4/2018 1:00:00	PMW-5
VI_Samples_v1	282	KJC	DUP1(20180605)	DUP1(20180605)	WP	FD	FIELD	7Q01(20180605)	6/5/2018 8:00:00	7Q01
Lab	283	KJC	DUP1(20180606)	DUP1(20180606)	WG	FD	FIELD	13-5(20180606)	6/6/2018 8:00:00	13-5
	690	KJC	D1-GW-06-06-18	D1-GW-06-06-18	WG	FD	FIELD	E-8(20180606)	6/6/2018 11:40:00	E-8
Batch_v1	691	KJC	D1-GW-07-05-18	D1-GW-07-05-18	WG	FD	FIELD	ISCO-2(20180705)	7/5/2018 9:25:00	ISCO-2
	050	1010	D4 (00100000)	D4 (00100000)	1.00	50 C	CICLD	DMART 7 (MUNUT 1) (2010	20010010-2-50-00	

4. The end goal is to have all sections green. Some formats have warnings, which allows the data to be loaded but alerts the data provider to take a second look. Warnings will color the sections red, but they are still ok to load if the data provider has confirmed they are correct.

# **3.3 Correcting Errors**

As described in Section 1.0, the EDP application performs a series of formatting checks on the EDD and then identifies any records that have errors. The fields with errors will be shaded different colors depending on the type of error. A description of the error is provided when the cursor is placed over the field. In the example below, the sample\_matrix\_code values highlighted green indicate they are not valid reference values.

<b>*</b>				EQuIS Dat	ta Processor		
File Home		<ul> <li>✓ I Comment Re</li> <li>✓ S Errors Only</li> <li>Font Size: 8</li> </ul>	ows <b>T</b> Filter Colum <b>X</b> Pin Column Column Choo	n(s) 🗄 Copy	Row(s)	B . C . Q	d Sort
Open Error	Log		View			Data	
nitial					Rows: 28 of 28 [	Comment Rows, Errors Onl	y]
DataProvider_v1	Line	data_provider	sys sample code	sample_name	sample_matrix_cod	le sample_type_code	sample
Location_v1	30	KJC	D1-AIR-10-15-18	D1-AIR-10-15-18	AE	FD	FIELD
SubfacilityLocation_v1	31	KJC	D2-AIR-02-23-18	D2-AIR-02-23-18	AE	FD	FIELD
Task_v1 COC_v1	32	KJC	D2-AIR-03-19-18	D2-Air-03-19-18	AE	FD	FIELD
SDG v1	33	KJC	D2-AIR-05-16-18	D2-AIR-05-16-18	AE	FD	FIELD
Equipment_v1	34	KJC	D2-AIR-06-18-18	D2-AIR-06-18-18	AE	FD	FIELD
EquipmentParameter_v1 35		KJC	D2-AIR-07-18-18	D2-AIR-07-18-18	AE	FD	FIELD
Files_v1	36	KJC	D2-AIR-08-13-08	D2-AIR-08-13-08	AE	FD	FIELD
DrillActivity_v1	ity_v1 37 KJC D2-AIR-10-15-18 D2-AIR-10-15-18 AE		AE	FD	FIELD		
DownholePoint_v1	38	KJC	DI-AIR-02-23-18	DI-AIR-02-23-18	AE	FD	FIELD
Lithology_v1	257	KJC	D1-GW-10-02-18	D1-GW-10-02-18	WG	FD	FIELD
WellConstruction_v1	259	KJC	D1-GW-11-19-18	D1-GW-11-19-18	D1-GW-11-19-18 WG		FIELD
WaterLevel_v1	260	KJC	D1-GW-12-12-18	D1-GW-12-12-18	WG	FD	FIELD
WaterTable_v1	275	KJC	D1-GW-09-05-18	D1-GW-09-05-18	WG	N	FIELD
FieldSample_v1	278	KJC	7L01(20180606)	7L01(20180606)	WP	▼ N	FIELD
FieldResults_v1	279	KJC	7P17(20180605)	7P17(20180605)	WP Ref	erence value not found	FIELD
Vapor Intrusion	280	KJC	7Q01(20180605)	7Q01(20180605)	WP		FIELD
VI_Buildinginspection_VI VI TaskParameters v1	281	KJC	D-1(20180604)	D-1(20180604)	WG	FD	FIELD
VI_Samples_v1			DUP1(20180605)	DUP1(20180605)	WP	FD	FIELD
Lab	283	KJC	DUP1(20180606)	DUP1(20180606)	WG	FD	FIELD
Sample_v1 TestResultQC v1	690	KJC	D1-GW-06-06-18	D1-GW-06-06-18	WG	FD	FIELD
Batch_v1	691	KJC	D1-GW-07-05-18	D1-GW-07-05-18	WG	FD	FIELD
		1416	D1 (20100200)	D1 (20100200)	1.10	50	EIELD

For most errors, there are two correction methods:

- 1. **Correct directly in EDP:** Click in the error field and type the correct value. If the field is restricted to a list of valid values, the valid values will be provided in a drop-down list by clicking on the down arrow located on the left side of the field. Once an error is corrected and the cursor is moved out of the field (i.e., user clicks on another field), the shading signifying an error should disappear. If you believe you have corrected an error, but the field remains shaded, refresh the EDD by selecting 'Refresh Table' in the Home Ribbon.
  - a. If you correct errors directly in EDP, make sure to save your updates to your original EDD you loaded. See Section 3.4 on savings changes to the EDD file.
- 2. **Correct in original EDD:** Exit the EDP application and open the EDD file. Correct the errors in the EDD file, resave the EDD, and then re-load the EDD back into EDP to check for additional errors.

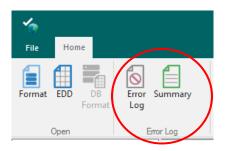
**NOTE:** If data providers believe a new reference value is required, email the reference value request to <u>MontanaEQuIS@mt.gov</u>.

#### 3.3.1 Error Logs

If there are errors present after an EDD has been loaded, the error log is a useful tool. EDP has two types of error logs:

- **Error Log:** A detailed list of each error including worksheet, column, row, and type for each error in the EDD.
- Error Summary: A summary that lists an error count for each error value within each section and column.

Each error log can be exported as an Excel or HTML file. To access the Error Logs, click on the 'Error Log' or 'Summary' buttons in the Error Log section of the Home Ribbon.



#### 3.3.2 Home Ribbon Features to Assist in Correcting Errors

EQuIS Data Processor								
CommentRows	Filter Column(s)	🚟 Add New Row	8.	$\mathbf{a}$	$\cap$	A	🔀 Blank EDD 🔹 🛛 😭 Design Format File	
🗹 🚫 Errors Only	🛧 Pin Column(s)	🗄 Copy Row(s)			$\mathbf{X}_{\mathbf{r}}$	Z♥Ť	📃 EDD Description	2
Font Size: 8 💌	Column Chooser 🔻	🛗 Set as Comment Row	Clear	Refresh	Find	Sort	💼 Generate Format File	÷
							<b>T</b> .	
View			Data				Tools	Help

There are several tools in the Home Ribbon to assist in correcting errors:

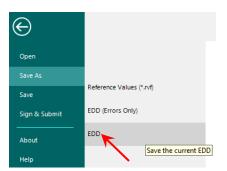
- In the View section:
  - <u>Comment Rows</u>: Check the box to show comment rows. Comment rows are non-data rows, typically the two header rows in each section of your EDD. Outside of EDP, mark a row as a comment row by adding a pound sign before the first character (#).
  - <u>Errors Only</u>: Check the box to show only rows with errors. This is very helpful when searching for records with errors, especially in larger EDDs.
  - <u>Filter Columns</u>: Select 'Filter Columns' to turn on the column filter feature. When on, the filter icon will appear next to each column name. To filter a column, select the filter icon and choose your desired filter option.
  - <u>Pin Columns</u>: Select 'Pin Columns' to turn on the pin column feature. When on, the pin icon (a small push pin) appears next to each column name. To pin a column so it will not move, click the pin icon next to the column.
- In the Data section:
  - <u>Add New Row</u>: By selecting 'Add New Row', a blank row will be added to the bottom of the current EDD section you're viewing. This allows the user to enter data directly into the EDD using the EDP interface. The format rules are applied as the data is entered.
  - <u>Set as Comment Row</u>: If a comment row appears as a data record, highlight the row and select 'Set as Comment Row'.
  - <u>Find and Replace</u>: The 'Find' and 'Replace' function allows searching the EDD for specified values and then replacing those values with another value. This function is useful when there are a number of similar values that need to be changed.
  - <u>Sort</u>: After selecting a column, select Sort to sort the records in ascending (A to Z, smallest to largest) or descending (Z to A, largest to smallest) order.
- <u>Help</u>: The help button will open EarthSoft's most up-to-date EDP documentation. This documentation is not managed by DEQ, but can provide additional information for experienced EDP users.

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## 3.4 Saving Changes to the EDD File

Changes made to the EDD directly in the EDP application are not automatically saved to the original EDD file that was loaded. To save the changes made:

1. Select 'File', 'Save as', 'EDD'.



2. Browse to where you would like to save the file. If you want to save the EDD as an Excel workbook with each section on a separate worksheet, select 'Excel Workbook' from the 'Save as type:' drop-down menu.

# 3.5 Sign and Submit

Sign and Submit is a tool designed to facilitate submitting data to EQuIS Enterprise. It automatically creates a data package containing all the data, any attached documents, and user credentials. In order to use this tool, the user must have an active EQuIS Enterprise user name and password.

**NOTE:** This tool is not used in all DEQ program workflows. Only use this tool if the program you are submitting data to requests it.

- 1. Load EDD data into EDP and make sure all errors are resolved.
- 2. Select 'File' and 'Sign & Submit'.
- 3. Enter EQuIS Enterprise User Name, Password, and Facility ID you will be submitting data to. Contact your project officer if you are not sure what Facility to submit to.

$\bigcirc$	EQuIS Data Processor	-		×
Open	User Name: cb0000			
Save As	Password: ********			
Save	Facility: MTWTRSHD_WQX			
Sign & Submit	Submit URL:	_		
About				
Help				
Register				
Options				
Exit	Save Password	Save	Submit	

- Click 'Save'. Browse to the location where you want your file to be saved and click 'Save'. Once the zipped EDD package is saved, a confirmation window will appear indicating 'EDD Signed and Saved'. Click 'OK' to close.
- 5. The zipped EDD package's name consists of CurrentDate.FacilityCode.FormateFileName.zip. This zip file can now be submitted to DEQ as directed by the program your are submitting to.