

CO Environmental Web Application Users Help



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Welcome to CO Environmental

Welcome to Colorado Environmental (CO Env), a Web application developed to manage environmental sampling data collected from oil and gas project locations and associated laboratory analytical results data. Oil and gas operators, their third-party laboratories, agency environmental scientists and field inspectors can use the application to upload data in Excel or [EPA WQX](#)-derived XML or via secure data entry pages.

The CO Env application is a part of the Ground Water Protection Council's (GWPC's) national RBDMS Environmental program, which was developed through a grant from the U.S. Department of Energy, [Office of Fossil Energy](#). RBDMS Environmental software is used to manage environmental and laboratory information associated with source water quality protection programs and regulatory oversight of fossil-fuel extraction and various types of mining operations. Programming for the RBDMS CO Env application was provided by [Virtual Engineering Solutions, Inc.](#), with GIS programming by [Coordinate Solutions, Inc.](#)

About CO Env

CO Env is a Silverlight application. Microsoft Silverlight is a free browser plug-in powered by the .NET framework that is compatible across multiple browsers, devices and operating systems. First-time site users who do not have Silverlight installed on their workstations will be directed to a page containing the following Get Silverlight icon:



Clicking the hyperlinked icon will download the required version of [Silverlight](#).

Users may need to add the URL for the CO Env Silverlight site to a trusted zone. In Internet Explorer, choose **Tools | Internet Options, Security** tab, **Trusted** sites. In Firefox, choose **Options, Content**, and then **Exceptions**.

Logging in to the CO Env Web

Agency users in the Environmental Sciences department should use the following steps to log into the application:

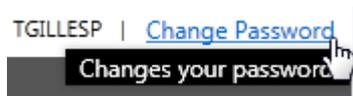
1. Open the application at the designated URL.
2. Enter the user name and password that the system administrator assigned to you. The password field is case-sensitive, and strong typing is enforced (six or more characters including letters, numbers, symbols, and punctuation).
3. Press **Enter** or click **Log In**. The **Home** page containing the dashboard will open.

Effective with the March 2014 update of the CO Env application, users in the *Operator* and *Operator Administrator* roles will log into the application via the CO eForm application. These users will be directed to the [Facility and Sample Data wizard](#).

For agency users who log into the CO eForm application with an *Operator Number*, the dashboard will display the **Active Operator** combo box on the dashboard. Your system administrator can set this profile option for you on the **Administration | Users** page. If you have multiple profile options, you must set the correct operator number to associate any data uploads you wish to make on behalf of a company in the **Active Operator** combo box on the dashboard.

Changing Your Password

The CO Env Web application enforces password strength. Passwords are case-sensitive and must include a mix of special characters, numbers, and letters, e.g., “Password!123.” Non-administrative users can change their passwords by clicking the **Change Password** icon in the bottom right corner of the application window.



This security feature imposes self-management of passwords at intervals specified by the COGCC's business rules. To change your password, follow these steps:

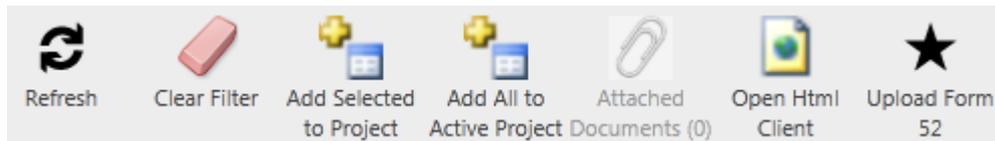
1. Click the **Change Password** call to open the **Change Password** pop-up form.
2. Complete the pop-up form, entering your current password, your new password, and your new password confirmation. Then click **OK**.
3. Test your new password by selecting **Home | Logout** and then logging back in to a new session.

Becoming Familiar with the Desktop

The COE Env application **Home** page consists of a dashboard and data filter. A menu and page tabs are positioned at the top of the browser window, and a context-sensitive tool bar ribbon is positioned at the bottom.

Tool Bar Format and Content

The tool bar ribbon on the **Home** page dashboard includes the following features:



- **Refresh:** resets the dashboard to an empty and ready condition.
- **Clear Filter:** resets the dashboard grid to empty but preserves the filter settings.
- **Add Selected to Project:** allows selected facilities on the dashboard grid to be [added to a named, active project](#).
- **Add All to Active Project:** allows adding the results of a query on the dashboard to to a named, active project.
- **Attached Documents:** feature added by the COGCC.
- **Open Html Client:** opens the data mining web interface for reporting and GIS.
- **Upload Form 52:** opens the [Facility and Sample Data Upload wizard](#) that has been linked to CO eForm.

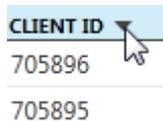
Positioning and Sorting Columns

Users also may set the desired column order, width, and sorting options within the dashboard control.

- Reorder the columns by clicking and holding in a targeted column header and then dragging the column to the new position and dropping it.
- Resize the columns by positioning the cursor on the column divider until the cursor changes to a double-headed arrow. Then click and slide to make the column wider or narrower.



To change the sort order (ascending/descending) of a column, click in the column header.



Exporting Facility Data

Facility and associated sample and result data can be exported from the CO Env **Home** page dashboard as XML-formatted data sets. Please see the topic [Downloading Data from the CO Env Web](#) for the procedure.

Filtering and Viewing Results on the Dashboard

Querying the Dashboard

Users can query the dashboard to return specific facility records for analysis. The dashboard can be queried in several ways:

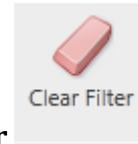
- By specifying a set of criteria in the filter at the top of the form to return a desired dataset.
- By [specifying an active project](#) to return all facilities associated with the project.

To use the filter criteria at the top of the form, follow these steps:

1. Choose the criterion you want to use for your search (e.g., *FacilityID*, *ClientID*, or some other option) in the **Where** field combo box.
2. Choose the desired Boolean comparison (*equals*, *does not equal*, *>=*, *>*, *<*, *<=*, *contains*, or *does not contain*)
3. Enter the search string. For example, “Where FacilityName contains mw4.” You also can add clauses or groups to the query to run more sophisticated AND and OR data searches. To do so, follow these general steps:
 - a. **Add Clause** or **Add Group**.
 - b. In the new filter line, enter the search specification.
4. Click **Go**.

If you would like to change the query, you can delete a clause by clicking the **Delete** icon that appears when you position your mouse cursor next to the line:

Clearing the Dashboard Filter and Results Grid



1. To clear the dashboard filter results, click **Clear Filter** from the application tool bar ribbon. Note that this action does not clear the query from the filter controls. The previous query remains available until the selection criteria are changed.

2. To clear both the filter controls as well as the dashboard grid, click **Refresh**



on the tool bar.

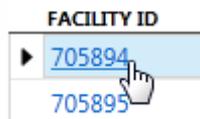
3. To fill the dashboard with all available facility records in the database, leave the filter controls blank and click **Go**.

Viewing Data Returned from Queries

Each record displayed in the dashboard is hyper-linked to related pages in the application.

1. On the dashboard, click the *FacilityID* or the *FacilityName* to open a specific facility record.

[Facilities](#)

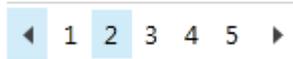


2. The [Facility Editor](#) will open in a new tab to show general header and location information about the facility on the top of the page and a grid of sample records associated with the facility on the bottom of the page. The **Facility Editor** will be read-only for users in the *Operator* and *Operator Administrator* roles.

Using the General Navigation Aids

Scrolling through Records on the Dashboard

Many of the grids in the CO Env application are multi-page filter controls. Each page displays 50 records, and the number of pages in the returned record set is shown in the scroll bar at the bottom of the application window.

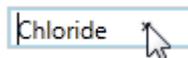


Searching for String Values

The **Search** field on the dashboard and throughout the application can be used to search for characters in fields that are formatted as strings. Enter the characters and press **Enter**. The grid will be filtered to show those records in which the string of characters occurs.



To clear the search results, click the **Clear Search** button in the **Search** window.



Running Reports

The advanced filtering capabilities of the dashboard on the **Home** page have been integrated with the reporting feature of the CO Env Web application. To run a report, follow these general steps:

1. [Filter the dashboard](#) for a project or facility grouping.
2. Switch to the **Reports** page.
3. Select a report from the left side menu, e.g., “**Facility Information | Analytical Results.**”
4. The dynamic report data filter will display the available selection criteria for the report you chose. So for example, for the Analytical Results report, you might either select an *Analysis List* or click the **Autoselect Analysis** check box to “True” to use the analysis lists already associated with the facility samples.
5. If you wish to run the report for the facilities returned from the dashboard query, click in the **Use filtered facilities** check box to set it to "True." If you wish to limit the report to only some of the facilities shown on the dashboard, return to the dashboard and use the multi-select keys **Ctrl+click** or **Shift+click** to select the rows for the facilities you wish to include in the report. Then, in **Reports** filter click the **Use selected facilities** check box to set it to "True."
6. Click **Create Report**. The report will open in a new browser window.

Each report has its own security settings. Users in different roles may have different views of the available reports.

A Word about Uploading Laboratory Data

Agency Users

The COGCC can upload analytical results data in either of two electronic data deliverable formats. The **Data Uploads** page available on the **Edit** menu will accept either an Excel-formatted upload of analytical data or an XML-formatted data deliverable that has been exported from a laboratory information management system (LIMS).

Excel-formatted data deliverables must conform to the hierarchical format specified in the sample at

http://www.rbdmsonline.org/RbdmsEnv/Help/CO_ExampleLabDataSpreadsheet.xls. A completed example of an Excel-formatted EDD is available at http://www.rbdmsonline.org/RbdmsEnv/Help/Sample_CompletedExcelEDD.xls

XML-formatted data deliverables must comply with the EPA WQX-derived format specified at <http://www.rbdmsonline.org/xml/COEnvEDD/COEnvEDD.html>.

Learn more about..

[Using the features of the **Data Uploads** page](#)

Uploading [an electronic data deliverable](#)

[Deleting an uploaded file in Pending](#) status

[Downloading data from the CO Env Web](#)

[Validating the uploaded](#) data

[Verifying data](#) deliverables

Industry Users

Oil and gas operators and their third-party laboratories can upload environmental and laboratory analytical results directly to the CO Env Web application by logging into the CO eForm application and selecting **Upload Form 52**, which will open the **Facility and Sample Data wizard**. The wizard provides industry operators with a simplified set of screens for uploading analytical data through the single sign-on used for the CO eForm application. Agency users should continue to use the full data views and user interface of the CO Env Silverlight application.

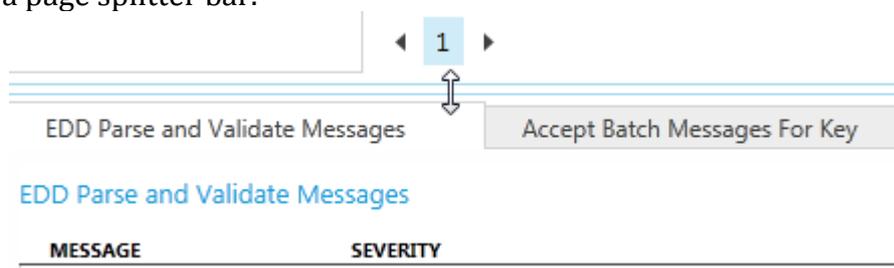
Using the Features of the Data Uploads Page

The top of the **Data Uploads** page features a control to filter the view of the *Uploaded Files* grid by status. The view will default to the *Pending* status when an operator logs into the application. Clicking one of the EDD statuses in the **EDD Status to select** pane will display the records in that named status that have been uploaded to the holding area on the web server.

The page tool bar includes the following options:

- **Import File** 
- **Parse and Validate File** 
- **Export File**  in Excel or .xml formats
- **Open and Review File**  (requires user privilege)
- **Verify an EDD File**  (requires user privilege)
- **Reject an EDD File**  (requires user privilege)
- **Delete Record** 

Like the dashboard on the **Home** page, the *Uploaded Files* grid is a multi-page control. Below the grid scrollbar control is a message space that is separated from the grid with a page splitter bar.

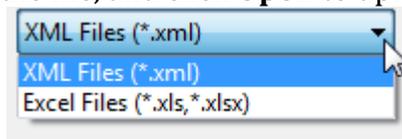


Quality control messages from the parser are displayed in the bottom portion of the **Data Uploads** page.

Uploading an Electronic Data Deliverable

To upload a new electronic data delivery (EDD), follow these steps:

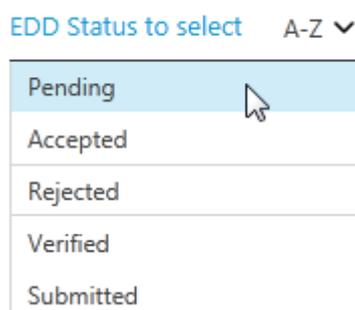
1. From the **Edit** menu, open the **Data Uploads** page.
2. In the toolbar on the *Uploaded Files by Status grid*, click **Import File** . A **File | Open** dialog box will offer the option of filtering for and selecting either an XML or an Excel file. Browse to the location of the file you wish to upload, select the file, and click **Open** to upload your file.



3. The status of the uploaded file at this point is *Pending*. It will not be accepted until the data in it passes a variety of quality control checks. Formatting checks vary by the file type uploaded, [and two rounds of data validations](#) are run.

Pending uploads on this page have not yet been checked for data validation exceptions. The steps to import an EDD on the **Data Uploads** page follow:

1. From the **Edit** menu, open the **Data Uploads** page.
2. Click *Pending* in the **EDD Status to select** pane.



3. In the *Uploaded Files by Status* pane, click the row header for the EDD upload record of interest to select it.
4. Click **Parse and Validate File** .

If the file passes the data validation checks, it will be moved into the *Accepted* status upon **Refresh**. If the file fails data validation, it will be moved to the *Rejected* status upon **Refresh**. Messages about the status of the uploaded file are displayed in the lower portion of the page.

Deleting an Uploaded File

You may delete an uploaded file that is in a *Pending* status from the **Data Uploads** page:
To do so, follow these steps:

1. Select the record you wish to delete by clicking in the record row header.
2. With your record selected and highlighted, click **Delete Record** , which will mark the record for deletion **x**.



3. Click the **Save**  button on the tool bar ribbon to complete the *Delete* action.

Downloading Data from the CO Env Web

Data can be exported from the CO Env Web application from two locations: from the **Export File**  button on the **Uploaded Data** page and from the **Export XML** button on the **Home** page dashboard.

From the Uploaded Data Page

Data sets can be downloaded from the *Uploaded Files By Status* grid on the **Data Uploads** page. To do so, follow these steps:

1. On the *Uploaded Files By Status* grid, select a dataset for download by clicking in the desired row header.
2. Click **Export File** .
3. In the **Save As** dialog box, specify the file name and path. The file type exported will match the format used for the original upload.
4. In Windows Explorer, navigate to the file you saved and open it to confirm its contents.

From the Home Page Dashboard

XML-formatted data sets can be exported from the CO Env Web from the **Home** page dashboard.

1. Use the [dashboard query capabilities](#) to filter for the facilities of interest.
2. In the record row headers, use the multi-select keys **Shift+click** and **Ctrl+click** to select the returned facility records for which you wish to export XML-formatted data.
3. Once your selections have been highlighted, click **Export XML**. The **File | Save** dialog box will open.
4. Specify the file path and file name and click **Save**.
5. In Windows Explorer, navigate to the file and double-click the file name to open it. The file will open in the default application for viewing XML files, usually a browser such as Internet Explorer.

Validating the Uploaded Data

For XML files, the first-round checks validate the data against the XSD schema. A copy of the schema can be found at <http://www.rbdmsonline.org/xml/COEnvEDD.xsd>. Schema documentation is at <http://www.rbdmsonline.org/xml/COEnvEDD/COEnvEDD.htm>. Errors in file organization, data types, data ranges, etc., will be displayed at the bottom of the page so that the information can be corrected and the file re-uploaded.

For Excel files, the first-round checks validate the file for conformance to the published organizational hierarchy for the EDD (Organization, Sample, Batch, Result, QC). Error messages for first-round data checks will display in the bottom grid for parsing errors (i.e., string data in a numeric field).

Second-round data validations on both file types include checks for valid *FacilityIDs*, *LabIDs*, etc., among many other checks. QC messages will be displayed in the **EDD Parse and Validate Messages** tab.

The data validation checks can return several levels of error severity returned:

- **Informational:** Level 0. Action may proceed (Status=*Accepted*).
- **Warning:** Level 1. The data will be accepted but flagged (Status=*Accepted with flag*). An example of this condition will occur if an optional field in an electronic data deliverable contains invalid data, such as when a user enters a non-numeric value for a result detection limit.
- **Error:** Level 2. The data will be *Rejected*. The operator will need to correct the data for re-upload.

After an electronic data deliverable has passed validation checks, its status will be changed to *Accepted*. A confirmation message from the parser will be displayed on the **Accept Batch Messages** tab on the **Data Uploads** page.

Verifying Data Deliverables

Although files that pass both rounds of automated data validations are given a status of *Accepted*, a final step to *Verify* the information takes place before the data is accepted into the agency's database.

1. On the **Data Uploads** page, an agency reviewer will **Open**  each data set with a status of *Accepted*.
2. The data set will open in a read-only **EDD Review** page to review it.
3. Each submission can then be **Verified**  from the **Data Uploads** page. The **Verified**  button moves the uploaded data into the primary database and displays any other relevant messages from the parser in the **Accept Batch Messages** tab.
4. Alternatively, a submission may be **Rejected** , either from the **Data Uploads** page or from the **EDD Review** page.

You will receive an automated email from the CO Env Web application if your electronic data deliverable (EDD) is rejected at this point in the review process. Rejections are at the discretion of the COGCC.

The **EDD Review** page presents internal agency reviewers with a read-only view of data presented in two tabbed pages: **Samples** and **Batch QC**.

- The **Samples** tab displays a grid of the Sample ID records in the uploaded EDD. Clicking on a Sample ID record row header dynamically displays the results of the testing performed on the sample in the **Results** pane below.
- The **Batch QC** tab displays information about the how the batch of laboratory samples associated with the Sample ID was prepared and analyzed including the laboratory samples prepared for quality control purposes. The **Batch QC** tab includes grids for the *Lab Batch*, *Result Batches*, and *Lab Batch QC* records. An editable version of the grids shown on the **Batch QC** tab is available to agency users from the **Edit** | [Lab Batches](#) menu.

A Word about Project Information

A "project" is defined as a geographical area of disturbance for oil and gas activity, in effect, a polygon on a map. An example of a project is an oil and gas pad, which is assigned a numeric designation. A project also can be a policy, a rule, a location, or any other reason to order a sample to be obtained.

The CO Env application associates multiple facilities at a larger "project" organizational level. The **Project Editor** in the application provides a way for users to create new projects and to add and to delete facilities from particular projects.

The **Project Editor**, available from the **Edit** menu for users in the *Agency* role, displays a grid of the projects in the database in the left **Projects** pane. When you select a record in the *Projects* grid by clicking in the row header, information about the project is displayed in the main window of the editor. Project header information is displayed on the top of the main window, and a grid of facility records that are associated with the project is displayed in the **Project Facilities** pane below.

Learn more about...

Setting [the Active Project](#)

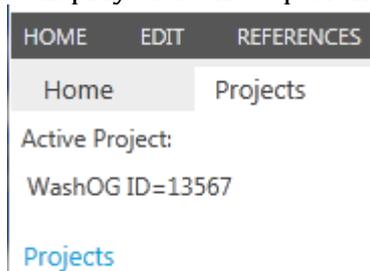
Creating a [New Project](#)

[Deleting](#) a Project

Associating a [Project with a Facility](#)

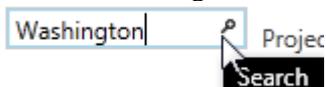
Setting the Active Project

To filter the dashboard on the **Home** page to show only those facilities associated with a specific project, you must set the active project in the **Project Editor**. The active project is displayed at the top of the page:

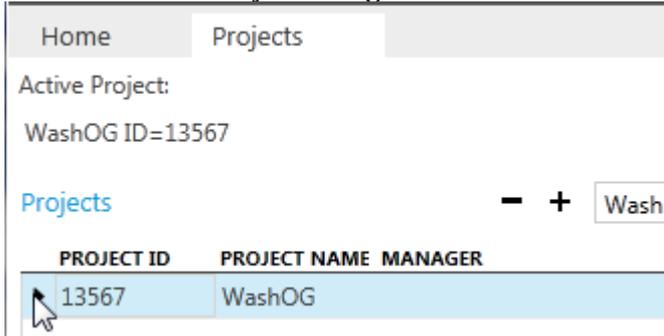


To set the active project, follow these steps:

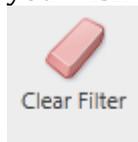
1. On the application menu, select **Edit | Projects** . The **Project Editor** will open.
2. In the **Projects** pane on the left, search for the project record you would like to make active by scrolling, sorting, or entering a search string for the *Project Name* or *Manager*.



3. Select the record by clicking in the record row header.



4. Then, on the tool bar ribbon, click **Set Active Project**. The name of the active project is displayed in the top information line of the **Project Editor**.
5. Return to the **Home** page and click the **Use Project to Filter** check box to filter the dashboard to show only those facilities that are associated with the project.
6. When you wish to clear the filtered view of the dashboard, click **Clear**



Filter. Note that this action does not change the active project setting in the **Project Editor**. To clear the active project, return to the Project Editor and click **Clear Active Project**

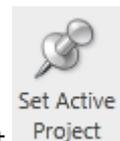


Creating a New Project

1. In the *Projects* pane of the **Project Editor**, click the **Add Record**  button. The main window pane will display a blank record form.
2. Enter a **Project Name**, an [Analysis List](#) that will be associated with the samples that are linked to the project facilities, and the County where the project is located.



3. Click **Save**. A *ProjectID* number will be generated.



4. To associate facilities with the new project, click **Set Active Project** and return to the **Home** page. Then use the dashboard filtering capabilities [to add facilities to the project](#).

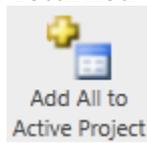
Note: If you omit a data field that is required or otherwise violate a data validation rule, you will be prompted to correct the error and to re-save the record. Data validation errors are marked with an error  symbol on the page tab and the fields in question will be outlined in red. The nature of the errors is made available at the top of the page:



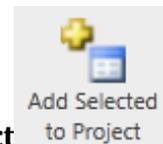
Associating Facilities with a Project

Agency users can create groups of facilities that are linked through a common job purpose in the **Project Editor**.

1. Set [the active project](#) in the project editor and return to the **Home** page.
2. [Query the dashboard](#) to return the facility records that you wish to add to the active project.
3. To select all of the records in the returned query results for addition to the



project, click **Add All to Project**. Or, to add only selected records from the returned query set to the project, use the **Ctrl+click** or **Shift+click** keyboard combinations to highlight your selections.



4. With your selections highlighted, click **Add Selected to Project**.

You can uncheck the **Use Project to Filter** check box and re-query the dashboard to add other facility records to the the project. To determine whether the facilities have been properly added to the project by opening the **Project Editor**, to review check the active project's associated facilities.

To remove the association of a facility with a project in the **Project Editor**,

1. Select the *Project Facility* record by clicking in the row header.
2. Click **Delete Record**  to mark the record for deletion.



3. Click **Save**.

Note: This action does not delete the underlying facility record. It merely deletes that facility's association with the active project.

Deleting a Project

1. In the **Projects** pane of the **Project Editor**, select a row for deletion by clicking in the row header.
2. Click the **Delete Record**  button to mark the record for deletion.

3. In the tool bar ribbon, click **Save**  .

Note: This action cannot be undone.

A Word about Facility Information

The concept of a "facility" includes both an operator and a purpose association in addition to an x,y location. Examples include surface facilities, other wells, or any location that is designated as a sampling point. For oil and gas wells, the CO Env application can associate multiple *Operator Number* records at the Facility level. Location information available at the Facility level must include QtrQtr, Section, Township, and Range. NAD83 is preferred for location data.

In the CO Env database application, entity information will be associated by facility, and several records for the same well might exist in association with different property owners. Since water well owners change and each well might be sampled multiple times, the *Permit Number* and *Receipt Number* (a designation added by the Water Department) also must be associated with the facility. Different facilities might require different fields, depending on *Facility Type*, so different information may be available on the form depending on the facility type.

When you click the *Facility ID* or *Facility Name* field on a record displayed on the dashboard, the record will open in the **Facility Editor**. This page will be read-only for users in the *Operator* and *Operator Administrator* roles. The **Facility Edit** page includes two tabs at the top of the page, one to display header information and the other to display location information. The bottom portion of the page displays a grid of the samples that are associated with the facility.

The *Sample ID* field for each sample record on the **Facility Edit** page is hyper-linked to the **Sample Editor**.

Learn more...

[Creating a New Facility](#)

[Adding and Deleting Samples Associated with Facility](#) Records

Creating a New Facility

Agency users can create new proposed facilities in the web DMZ on the **New Facilities** page accessible from the **Edit** menu.

1. On the **New Facilities** page, click the **Add Record**  button in the *Facility Names* grid. The main form on the right will clear to accept your entries.
2. Enter the information relevant to the facility you wish to create. Note that the **Facility Name** and the **X, Y** location coordinates are required fields.
3. For the **Address** field, users may either choose an address

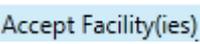
Choose Address: 
Display Address:  Choose an item from a list. or click **Enter Address**
 to open the **Addresses** page. To create a new address on the **Addresses** page, follow these steps:

- a. On the **Addresses** page, click **Add**  to create a new record.
- b. Complete the form in the right pane for the new record.

- c. Then click **Save and Set** , which will return you to the **Facility Edit** page with the address you entered populated in the **Display Address** fields.

4. Click **Save** .

Industry users can create new, proposed facilities through the [Facility and Sample Data Upload wizard](#).

Agency users will need to review facilities created in the web server database outside the firewall. The agency staff member assigned the responsibility of validating new facilities will perform this review on the **Edit | New Facilities** page. Once the data is found satisfactory--or is edited to the point of being satisfactory--the agency user can select the record by clicking in the record row header in the *Facility Names* grid (or multiple records with the multi-select keys **Shift+click** or **Ctrl+click**) and then click the **Accept Facility(ies)**  button. This action prompts the *GetFacilityTransfer* function of the middle-tier web service to assign permanent Facility ID numbers to these records, move the data into the internal database, and remove the facility(ies) from the DMZ page.

Adding and Deleting Samples Associated with Facility Records

The **Facility Editor** displays sample records that are associated with the facility in the **Samples** pane. Users in the *Agency* and *Administrator* roles can enter new or edit existing sample information in the following way:

1. To create a new sample record in the **Samples** subpage of the **Facility Edit** page, either click the **Add Record**  button or click directly in the grid on the **New Record**  row header.
2. Position in the cursor in the *Sample Date* field.
3. Enter data on the grid row, tabbing between each field.



4. Click **Save**  on the application tool bar ribbon. The *Sample ID* will be auto-generated.

To delete a sample record,

1. Select the row by clicking in the row header and then click **Delete Record** . The record will be marked for deletion.



2. To complete the deletion, click **Save**  on the tool bar ribbon.

To navigate to the **Sample Editor** to view, enter, or edit results data, click the *Sample ID* field in the sample record of interest in the **Samples** pane of the **Facility Editor**. The *Sample ID* field is hyper-linked to the **Sample Editor** page associated with the sample.

A Word about the Sample Editor

When you click the *Sample ID* field on a record displayed on the *Samples* pane of the **Facility Edit** page, the record will open in the **Sample Editor**.

The **Sample Edit** page includes two tabs at the top of the page, one to display common fields to describe the sample and the other to display supplemental information, such as various identifiers for the sample (*Complaint Number, Remediation Number, Inspection Number, NOAV Number, Project Number, Spill Number, MIT Number*, among others).

The bottom portion of the page displays two tabs:

- The **Analysis** tab, which presents a grid of the analyses the sample is subject to and the associated results. Additionally, if quality control data for the result batch is present for the sample, the **Edit Lab Batch** button will be enabled in the **Analysis** tab. When it is enabled, clicking the **Edit Lab Batch** button will open the **Lab Batches** page filtered for the Sample ID.
- The **Sample Reasons** tab, which presents a list of the multiple possible reasons for taking the sample.

Learn more about...

Associating [pre-set lists of analyses to specific samples](#).

Associating [analysis names to samples](#).

Recording [the reasons a sample was taken](#).

Using the [Lab Batches page](#).

Associating Analysis Names to Samples

Using Analysis Lists to Add Many Analyses at Once

The users in the *Agency Data* and *Administrator* roles can define reusable sets of parameters (analysis lists) that can be associated with each sample as a data-entry shortcut. These lists group parameters according to specific purposes. For example, some lists may be created for use for a specific project or perhaps as a department-wide standard reference list (e.g., "Standard Metals.")

If your user account is in the appropriate role, you can apply one or more of these predefined lists to a sample:

1. Click on the **New Record**  row of the *Results* grid on the **Analysis** tab of the **Sample Editor**.
2. Choose the name of an existing **Analysis List** from the combo box.
3. Click **Insert List**. A new record for each analysis name in the list that is not already associated with sample will be created.

4. **Save**  your updates.

If you enter results for the analyses at this point, remember to **Save**  your changes after editing the records.

Likewise, you can delete lists of analyses in much the same way:

1. In the **Analysis List** combo box, choose one of the lists you previously inserted into the grid and click **Delete List**. The parameters that compose the specified list will be marked for deletion from the *Results* grid.

2. **Save**  your changes to commit the *Delete* action.

Adding Single Analysis Records

Alternatively, you can add analysis names to the sample one at a time with the following steps:

1. Click **Add Record**  or the **New Record**  row header in the *Results* grid.
2. Select the name of the analysis you would like to add to the sample from the combo box in the *Analysis Name* column.
3. Repeat as necessary to add the desired records.

If you enter results for the analyses at this point, remember to **Save**  your changes after editing the records.

To delete analysis names from the *Results* grid, follow these steps:

1. Click in the row header to select the record.
2. Click **Delete Record**  to mark the row for deletion .

3. **Save**  your changes.

Filtering Results by Analysis List

For samples that have many associated analytical results, users may wish to filter the view of the sample results in the **Sample Editor** by analysis list. To do so, follow these steps:

1. In the **Sample Editor**, *Results* pane, select the **Analysis List** containing those parameters that you wish to bring to top of the Results list.
2. Click the Analysis Name column header to sort the entries. Any result parameter that matches the parameters in the analysis list you specified will be reordered by sequence number to move to the top of the list of results.

Adding Sample Reasons

1. In the **Sample Editor**, switch to the **Sample Reason** tab.
2. Click **Add Record**  and select an item from the **Lookup Reason** drop down.
3. Tab to the **Sub Reason** field and select an item from the drop down, if appropriate. Not all sample reasons include the possibility of sub reasons.



4. **Save** your changes.

Using the Lab Batches Page

An editable version of the information shown on the [EDD Review page](#), **Batch QC** tab, is available to users in the *Agency* role from the **Edit | Lab Batches** menu call. When called from the **Edit** menu, the **Lab Batches** page will display all available lab batch records in the *Lab Batches* grid.

When quality control data is present for the sample being reviewed, agency users also can access the **Lab Batches** page from the **Edit Lab Batch** button enabled on the **Sample Editor**, *Results* pane. When the **Lab Batches** page is opened from the **Sample Editor**, the page will be filtered for the Sample ID active in the **Sample Editor**.

This page displays information about the how the batch of laboratory samples associated with the Sample ID was prepared and analyzed including the laboratory samples prepared for quality control purposes. The **Lab Batches** page includes grids for *Lab Batch*, *Quality Control*, and *Result Batches* records.

To create a new lab batch,

1. Click the **Add**  button in the *Lab Batches* grid.
2. Enter the required information in the **Add New Lab Batch** pop up. (*Hint*: select the lab in the **view Lab** combo box to populate the **Lab ID**.)
3. Click **OK** to create the new record row. The *Quality Control* and *Result Batches* form tabs will clear to receive your data entry in the right-hand pane. Enter the lab quality control data on the **Quality Control** tab.
4. Switch to the **Result Batches** tab to enter associated data. The **Sample** combo box will be filtered to show only those samples associated with the batch. You may need to click **Refresh** to see the available list.



5. Click **Save** to write the record. This action will auto-assign a *Batch ID* number.

Uploading Facility and Sample Data from CO eForm

The **Facility and Sample Upload** wizard consists of five screens:

1. [Confirm Contact Info](#), which populates contact information about the operator and the user, allowing update and save of any updates.
2. [Options](#), a “Home” switchboard page that guides the user through the various tasks available through the wizard. Each completed operation within the wizard starts and ends on this page, thus allowing multiple paths through the wizard.
3. [Facility Edit](#), which allows users to create a new proposed facility or to edit location information for an existing proposed facility associated with the operator. Proposed facility information is subject to the approval of the COGCC.
4. [Analytical Data Upload](#), which allows user to import an electronic data deliverable (EDD) in either .xml or .xls formats. Clicking the **Import EDD** button automatically uploads the file to a holding area on the web server and parse the data against the schema. Quality control messages are then displayed on the bottom of the page. If the data passes all data validation checks, the **Next-->** button becomes visible. If the file fails data validation checks, only the **Return to Options** button will remain visible.
5. [Upload Review](#), which is accessed by clicking the **Next-->** button on screen 4, allows registered users to review each data upload and add sample information. Only the sample information at the top of the page is editable. Several actions are possible on this page:
 - a. Clicking **Cancel** will discard any changes that have been made to the sample information and return the user to the **Options** screen.
 - b. Once sample data has been added, clicking **Save** will update the information in the holding area on the web server and leave the page open for continued editing.
 - c. Clicking **Save/Exit** will update the information in the holding area on the web server and return the user to the **Options** screen.
 - d. Clicking **Submit EDD** for an upload that has passed all quality control checks will complete the submittal of the EDD to the COGCC and change the status of the upload to *Accepted*.

Users can exit the wizard from the **Options** screen by clicking the **Home** button, which will return the user to the CO eForm dashboard.

Screen 1. Editing Contact Information

Launching the **Facility and Sample Data Upload** wizard from the **CO eForm** dashboard directs the user to the first screen **Confirm Contact Info**. This screen displays the operator association for the logged-in user, the user name for the contact, and address information. Any changes entered will be captured when the user clicks **Save Changes**, which will open the [Options](#) screen.

Screen 2. Tracing Optional Paths Through the Wizard

The **Options** page allows the user to select one of the four possible tasks within the **Facility and Sample Data Upload** wizard. It represents both a start and an end point for each of the following task process flows:

- Create a new proposed facility. The user can associate the new facility with an API number, if appropriate. Clicking **New Facility** will call [screen 3](#) of the wizard.
- Edit an existing proposed facility. The user can select an existing proposed **Facility ID** from the combo box and then click **Edit Facility** to call [screen 3](#), which will be populated with available information about the facility for update.
- Upload a new EDD. Clicking **Upload Data** will invoke [screen 4](#) of the wizard.
- Edit sample data associated with a previously submitted EDD. Users can select an existing draft batch and click **Edit Data** to call [screen 5](#) of the wizard.

Screens 3-5 of the wizard each include a call to return to the **Options** page.

Screen 3. Creating a New or Editing an Existing Proposed Facility

Screen 3 of the Facility and Sample Upload wizard is used to upload or edit information about proposed facilities. Proposed facilities are subject to [COGCC internal review and vetting before acceptance](#). Draft Facility IDs will be associated with permanent Facility IDs once this review is complete and the information found to be satisfactory.

Creating a New Proposed Facility

Industry users can create a new proposed facility through the **Facility and Sample Data Upload** wizard, as follows:

- a. To associate the new proposed location to an API well number, on the [Options](#) page, select a county and enter a 5-digit sequence number. Then click **New Facility**. The wizard will advance to **Screen 3, Facility Edit** page. (**Note:** Entering a Well ID is not necessary to create a new proposed facility location. Users can click the **New Facility** page without associating the facility with an API well.)
- b. If you select a county, the county name will be auto-filled on the **Facility Edit** screen when it opens.
- c. On the **Facility Edit** screen, enter the form fields required to create a new, proposed facility location. At a minimum, the information will be subject to the following validation checks:
- d. **Facility Name** cannot be empty.
- e. **Latitude** and **Longitude** are both required to fall within valid ranges.
- f. Click **Save**. The facility data you entered will be saved to the holding area on the web server database outside the firewall.
- g. Click **Next**. The wizard will return to the **Screen 2, Options** page.

Clicking **Cancel** will cause the wizard to return to the **Options** screen without saving the proposed facility location.

Editing an Existing Proposed Facility

Users also can select and edit an existing proposed facility from the [Options](#) page.

1. On the **Options** screen, select a **Facility ID** from the combo box in the second and click **Edit Facility**.
2. **Screen 3, Facility Edit** will open to display existing data for the proposed facility. Modify the form contents as needed.
3. Click **Save**. The facility data updates you entered will be saved to the holding area on the web server database outside the firewall.
4. Click **Next**. The wizard will return to the **Screen 2, Options** page.

Clicking **Cancel** will cause the wizard to return to the **Options** page without saving the proposed facility information.

Screen 4. Uploading Analytical Data

Both registered public users (industry operators and laboratories) and agency staff can use the **Facility and Sample Data Upload** wizard to upload sample and analytical results data. If the wizard is opened by a user with internal agency permissions, that user also can review and accept the data into the internal database.

1. On the [Options](#) screen, click the **Upload Data** button. **Screen 4, Analytical Data Upload**, will open.
2. Click **Import EDD**. A **File | Open** dialog box will open.
3. Browse to the file location for either an XML- or Excel-formatted electronic data deliverable (EDD) file and click **Open**. The file name will appear next to the *Import File:* label at the top of the screen, and the file will be parsed and validated. A *Status* message will appear next to the file name.
4. If the file fails this data validation step, validation messages will be displayed along with the severity of each error in the lower portion of the screen. The wizard will stop, and the only available action will be to click **Return to Options**. At this point, you should correct the errors enumerated and then return to the wizard to re-upload your EDD.
5. If the file passes data validation checks, the **Next-->** button will become visible. Clicking **Next-->** will open [Screen 5, Upload Review](#).

Screen 5. Reviewing and Submitting an EDD Upload

Screen 5, **Upload Review**, allows users to review the electronic data deliverable (EDD) information they have uploaded and to data-enter additional information about the sample. The sample data fields in the top part of the form are editable, but the results data are read-only. If you edit the sample information in the top part of the page, be sure to Save the updates.

If the EDD has more than one sample record, use the navigation bar to view each sample.

Sample ID: 532124

Facility ID: 708115



Other actions that can be taken on screen 5 include the following:

- Clicking **Cancel** to discard any the updates and return to the [Options](#) screen.
- Clicking **Save** to update the sample information and then continue editing sample attribute data.
- Clicking **Save/Exit** to save the updates and return to the [Options](#) screen.
- If the batch has a status of *Passed*, clicking **Submit EDD** will submit the data to the COGCC and change its status to *Accepted*. A pop-up message will display the batch number and confirm the status of the upload. Clicking OK in the pop-up will return the display to the [Options](#) screen.