



DPIE Water – LWU Performance Reporting Portal

Handbook 2018/19



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DPIE Water - LWU Performance Reporting Portal - Handbook 2018/19

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More information

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1.1 Background

1 Introduction

In August 2019, the NSW Department of Planning, Industry & Environment – Water (DPIE Water) will ask local water utilities (LWUs) to report annual performance data for the 2018-19 reporting period through a new web portal housed on the Bureau of Meteorology's (the Bureau) database. We would like to acknowledge the support received from the Bureau for the development of the portal and this manual.

We have made this change to improve database capability, security and flexibility, provide for improved user functionality, enhance our validation and analytical capabilities, as well as facilitate streamlined reporting to the Bureau of Meteorology's *National Performance Report - Urban Water Utilities*.

1.2 Purpose of this document

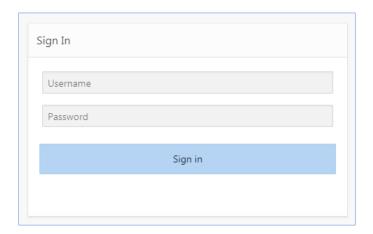
This document is a user guide for DPIE Water's LWU Performance Reporting Portal.

This document outlines how to use the portal, highlights various features, and provides explanation about how to determine what a user should report.

1.3 Login Details

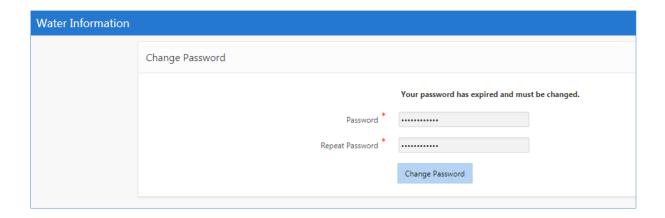
The DPIE Water- LWU performance Reporting portal can be found here

Each user from reporting LWU will be provided with a unique username and password. If you require login details, please contact DPIE Water on: LWU.PerformanceReporting@dpi.nsw.gov.au



If you login for the first time with a given password, a window will prompt and ask you to change your password. Password rules when changing password:

- 8 character minimum length
- Password has at least one alphabetic character
- Password has at least one number
- Password has at least one lowercase letter
- Password cannot be reused



2 Data portal

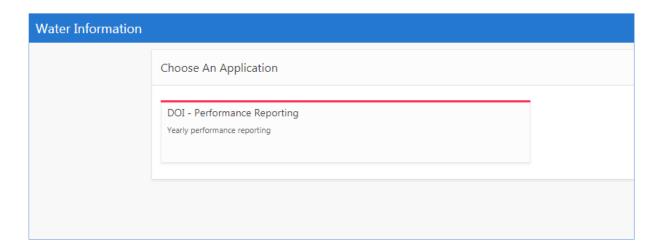
2.1 User access – users and managers

One of two types of user access will be assigned to each user account.

- Users can enter data for their utility only but not complete data entry.
- Managers can enter data for their utility and also complete data entry.

2.2 Navigation

After logging into the portal, users will access **DPIE Water – Performance Reporting** by clicking on the tile button.

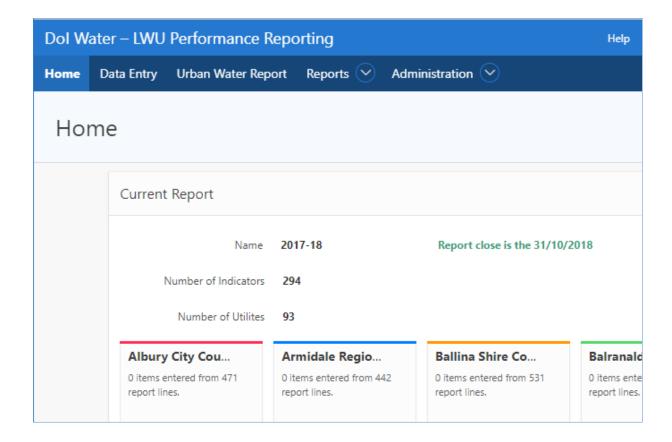


By the selection of **DPIE Water – Performance Reporting**, users will land on the home page.

The portal can be navigated using the options at the top of the screen. To report data select your current LWU on the **Home** page or go to the **Data Entry** page. To retrieve previously reported data go to the **Water Report** page. Note that all pages have a Help button on the top right of the screen

2.3 Home Page

This page shows LWU, the progress on indicator reporting and the report close date.



3 Data Entry

3.1 Utility asset checks

When the current report button is clicked for the first time, it will bring up the Utility Check page. Here a user will be asked to check and verify the treatment plants and associated system information assigned to a user's utility. If any details are incorrect please contact DPIE Water at LWU.PerformanceReporting@dpi.nsw.gov.au.

This check is only performed the first time a report is viewed, but will persist, and not allow reporting to commence, until one user from the LWU has verified the list. Plant related indicators set will not be generated for plants that are not present in the Utility asset check.

3.2 When to report No Data and Not Applicable

Each utility is presented with a list of indicators against which they need to report.

For each indicator you must supply one of three possible options:

- 1. a value,
- 2. "No Data" if the value for this indicator is not known.
- 3. "Not Applicable" if this indicator does not apply to your utility.

If there are indicators where no selection has been made, i.e. left as a blank value, the portal will not allow the report to be completed by the manager.

The table below provides some example to demonstrate where you would set a value to "No Data" or "Not Applicable".

Situation	Reported Value
The Hume Weir wastewater treatment plant is in working order, but no treated wastewater was discharged from the plant to land this year.	ST42 = 0 ML The volume is known and can be reported.
A flow meter has been damaged on Hume Weir Wastewater Treatment Plant, resulting in an unknown volume of outflow from the plant. There is insufficient information to make a reasonable estimate of this outflow.	ST41 = No Data. The outflow is not known and cannot be reported.
Hume Weir wastewater treatment plant does not have access to a coastline. It will never report wastewater disposals to sea or estuary.	ST40 = Not Applicable Walgett Shire Council will never report this value.

3.3 Reporting data

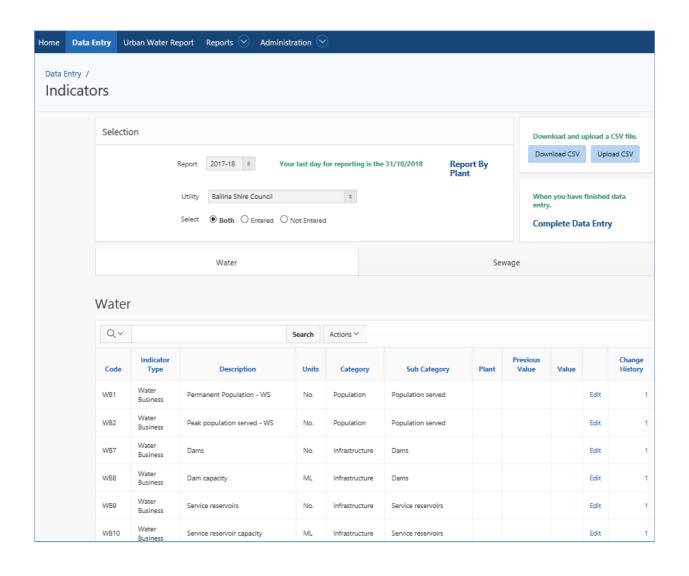
On the Data Entry page, a drop down menu allows users to select the reporting year. Radio buttons can also be used to limit the view by selection of entered indicators, not entered indicators or both.

Below radio buttons, there are two tabs to select the main indicators categories "Water" and "Sewage" and display the relevant indicators for data entry. Please note that indicator groups related to water supply or sewerage for utilities that do not provide these services have been disabled and there will be only one tab appearing on the report.

There are three options for reporting data:

- 1. Enter data manually into the main reporting page (see 3.3.1)
- 2. Enter data manually filtered on a per plant basis or a sub-category basis (see 3.3.2)
- 3. Upload a formatted CSV file (see 3.3.3)

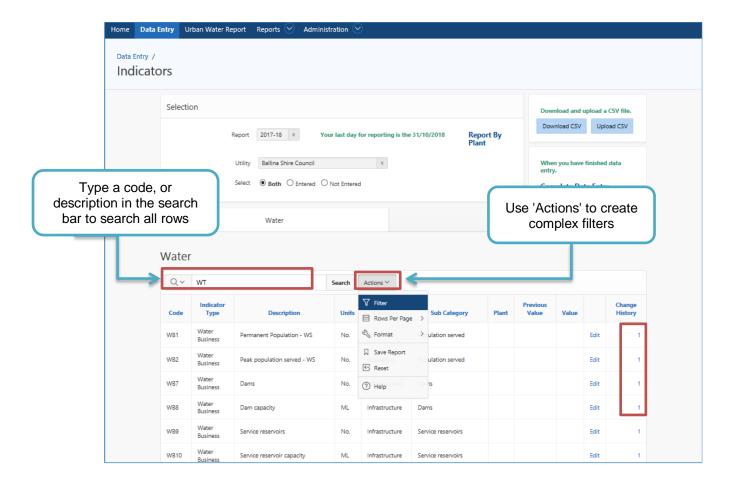
Data can be reported using any of these methods, or any combination of them, to suit individual workflows. This chapter shows how to report data using these three methods.



3.3.1 Reporting data values manually

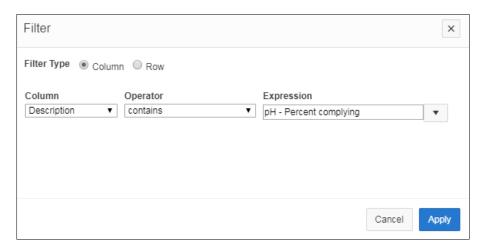
Data values can be entered manually for the current year using the edit function on the table shown on the Indicators page (Data Entry/agency/Indicators).

1. (Optional) Search for the indicator you wish to enter data for using the search bar or the Actions menu.

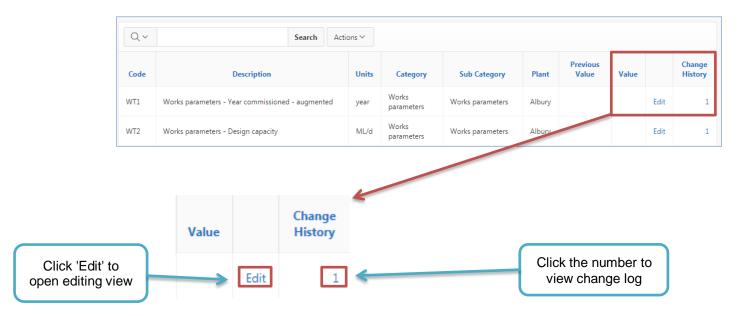


2. Within the Actions menu the Filter option creates complex filters. With this feature a filter can be applied that can be used to search for user specified text, with various operators (i.e. =, contains, <, etc). For example, the report can be filtered by an indicator group to only see those indicators.

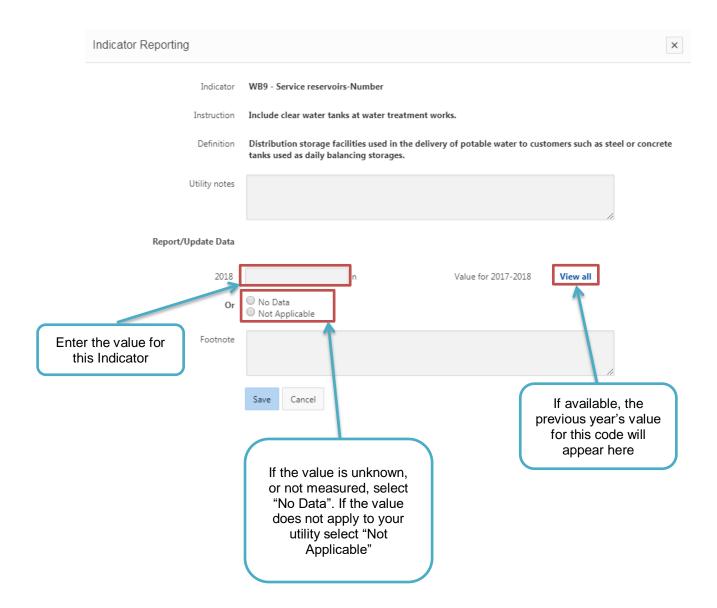
NOTE: CSV files can also be filtered in Excel and rows re-organised to suit a utility's work flow. The CSV will upload even if rows are reorganised or removed. More details on reporting by CSV in section 3.3.3



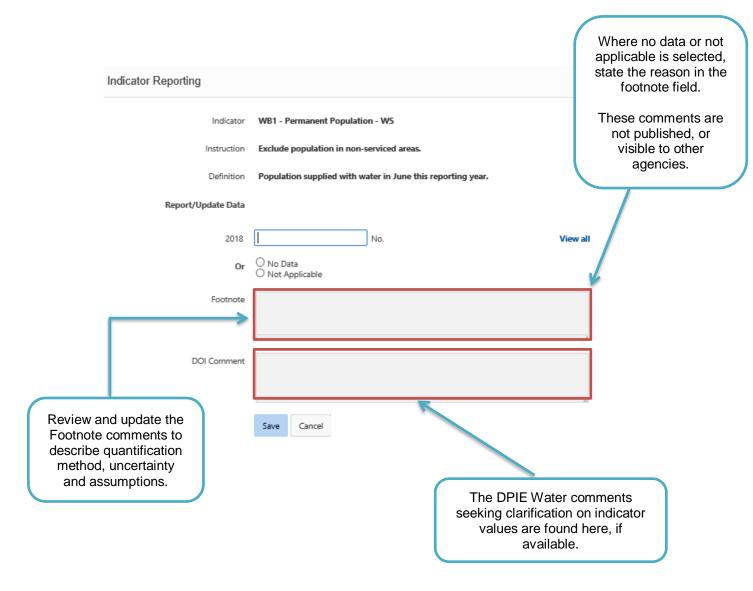
3. Each Indicator can be edited by pressing the blue "Edit" link on the right hand side of the table. The change history for each item can also be viewed.



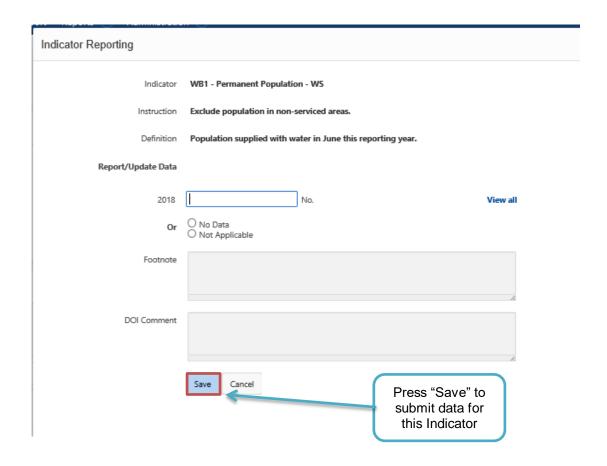
4. In the Edit Value pop-up you can insert data for the reporting year. The value of each indicator may be zero. If the value is unknown or not measured select the No Data option. If your utility does not undertake this specific function/provide this specific service, select the Not Applicable option.



5. Add Utility notes (optional) and footnote.



6. Once all fields are entered correctly for an Indicator press save to confirm the entered value and any notes.



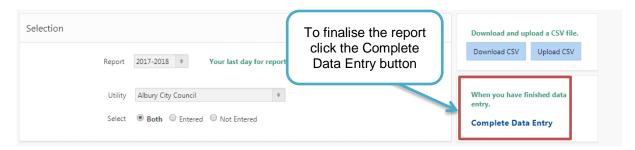
Each indicator value has broad validation rules. These rules are designed to catch transcription errors, typos, and incorrect units. If a reported value violates these rules you will see a warning after you press "Save".

Values that raise a warning can still be submitted, and will be accepted by the portal. However an explanatory comment must be provided, please use this to explain any significant changes in the reported value.

Volume (ML) 312.7 Previous Volume (ML) 31272

Warning, value is greater than +-60% from the previous year, is this correct?

7. Once all available data has been entered the report can be finalised by clicking the **Complete Data Entry** button.



Only a manager can complete reporting. When the **Complete Data Entry** button is pressed a confirmation screen will be displayed.

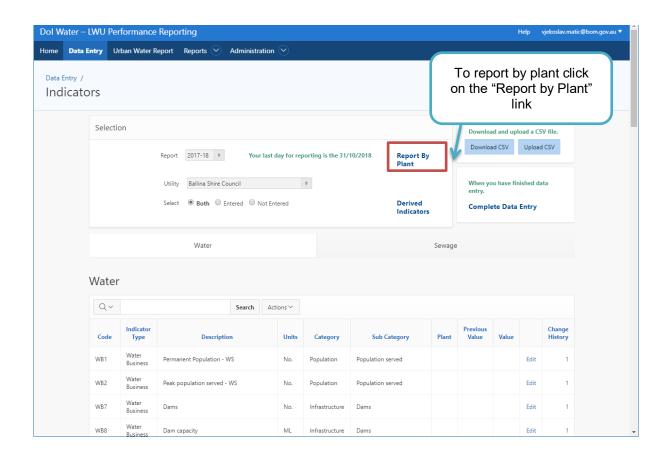
When the **Confirm Complete** button is pressed a pop-up confirmation will be displayed advising that all indicators for which data has not been entered will be set to "No Data".

To check/filter for not entered indicators (i.e. neither a value, nor "No Data" or "Not Applicable" has been entered), please select the "Not Entered" radio button on the top of the Data Entry page and select the "Water" and/or "Sewage" tab to display the not entered indicators in the two categories.

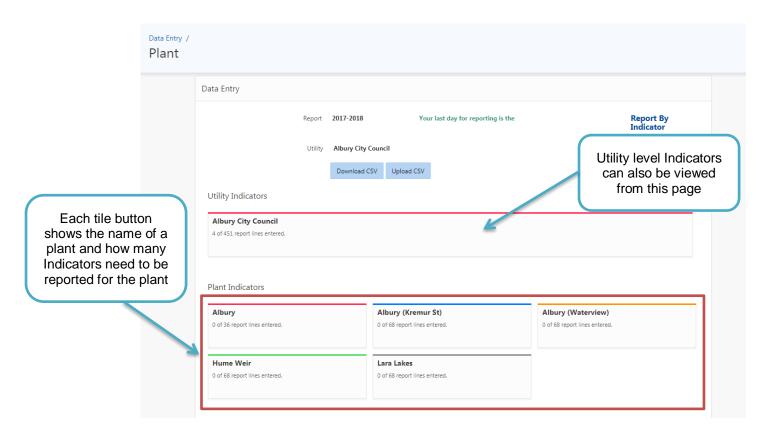
3.3.2 Reporting data by plant

When reporting data value manually, there is an option to view Indicators by plant. This allows data to be entered on a plant by plant basis. (CSV files can also be filtered by plant).

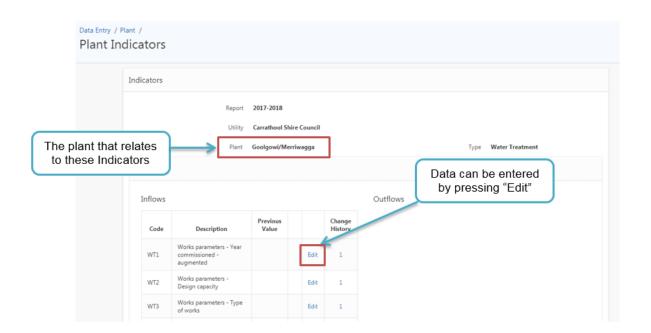
1. To access the reporting by plant option click on the "Report by Plant" link on the right hand side of the data reporting page.



2. Clicking the link will take you to a new page listing all the available plants.



3. Clicking on one of the tile buttons shows a reporting page for all the Indicators that relate to the selected plant. Data can be entered in the same way as described in 3.3.1.



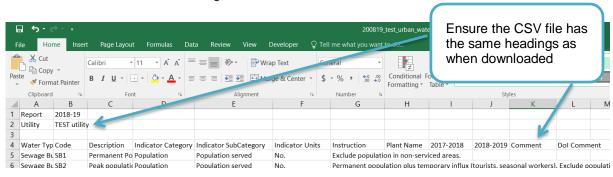
3.3.3 Reporting data by CSV file

A blank template CSV file can be downloaded for each LWU, filled and uploaded to facilitate bulk data entry. The download and upload buttons are located on the main data entry page.

1. To download Indicator information in a CSV file, select the reporting year and utility then click **Download CSV**. The CSV file download will be managed by your browser.



- 2. Add your data to the CSV by editing the appropriate columns. For the 2018-19 reporting year the values should be entered in the column called 2018-2019 (Data Entry). Comments must be added where "No Data" or "Not Applicable" is reported, otherwise these entries will be flagged as an error and upload will be rejected for those entries. Remember to save your edits as a CSV file; you cannot upload an Excel workbook.
- 3. To upload your saved CSV ensure upload file has correct data headings. These should be the same as the original downloaded file.



4. To submit your data click **Upload CSV** on the main data entry page.

THINGS TO REMEMBER WHEN WORKING WITH THE CSV FILE

The CSV file can be uploaded anytime, even partially completed. The values (blanks, actual value, <u>ND or No Data</u> for No Data, <u>Not Applicable</u> or <u>NAP</u> for Not Applicable) will be submitted as changes. (Values edited to "Blanks" <u>will be</u> considered as a CHANGE, and will prompt a warning – see section 3.3.3.5 below). **Existing values in portal <u>will be</u>** overridden by blanks; i.e. <u>will not remain</u> as submitted in previous CSV uploads: multiple partial uploads are allowed.

If a value needs to be edited again after upload, edit the CSV and upload it again or edit the value directly in the web portal.

- Please note that if you make edits directly in the portal but not the CSV file, any subsequent upload will override your edits in the portal (unless you make the same edit in the CSV file). A good way to manage this is to download a new CSV file each time you are about to make new edits to make sure the CSV file is up to date with data in the portal.

Please make sure one of the following methods are being followed to ensure that data is not lost due to multiple CSV uploads:

- a. The users can share the same CSV file and a single upload is done after all the data has been entered by different users - for example, user1 enters the CSV file with the values for certain set of indicators and then passes on the CSV file to user2 to enter the values for other indicators. After the data entry is complete, the CSV file is uploaded only once into the portal.
- b. The users can share the same CSV file and multiple uploads are done by different users for example, user1 enters with the values for certain set of indicators in the CSV file and uploads this file to the portal. Then they can pass the same CSV file to user2 to enter the values for other indicators (Caution: user2 should ensure that they are not changing any value for an indicator to a blank that has been entered by user1). After the data entry is complete, the CSV file is uploaded into the portal.
- c. The users have separate copies of CSV files and delete the rows with indicators that they are not going to enter/update values for and multiple uploads are done by different users for example, if user1 is entering data for all WB indicators, they should delete all the indicators that have codes starting with WT, SB and ST. And similarly, if user2 is entering all sewage relevant indicators, they should delete all the indicators that have codes WB and WT from their copy of CSV file. In this case, user1 can upload their copy of CSV with only WB indicators into the portal and user2 can do a subsequent upload of their copy of file with only SB and ST indicators (Caution: user2 should ensure they have deleted all the other indicators that they have not worked on). Please find below scenario based example that provide further explanation.

Examples/scenarios for using the CSV file

CSV file as downloaded from portal				
INDICATOR	VALUE			
WB1				
WB2				
WB3				
SB1				
SB2				

Scenario: The indicators	e downloaded t	file is used separately by 2 users to populate the different set of			
malcators					
CSV file uploa	CSV file upload1 by user1 (only for Water)				
INDICATOR	VALUE				
WB1	1				
WB2					
WB3	2				
SB1					
SB2					
CSV file uploa	ad1 by user2 (c	only for Sewage)			
INDICATOR	VALUE				
WB1					
WB2					
WB3					
SB1	3				
SB2	4				
	OUTCOME: The portal deletes the values for WB1 and WB2 (blanks from 2nd upload				
considered a	considered as EDITED value)				
INDICATOR	VALUE				
WB1		the value from upload1 is deleted			
WB2					
WB3		the value from upload1 is deleted			
SB1	3				
SB2	4				

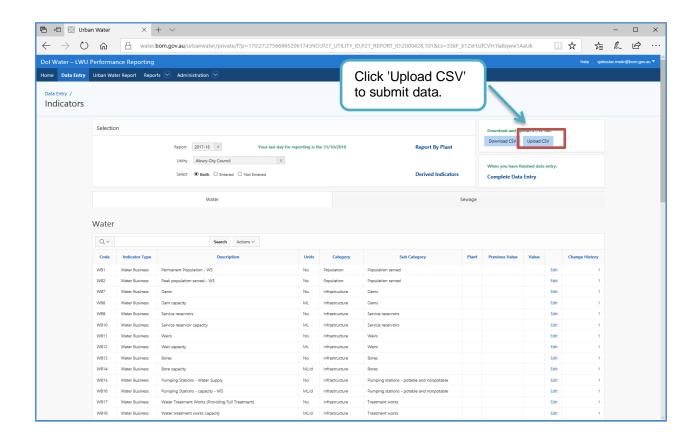
Solution/Workaround:

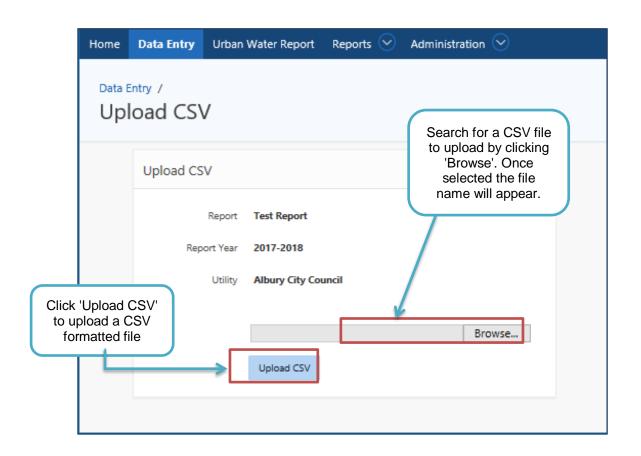
Any subsequent user uploads a modified CSV file that only contains the indicators row that the user wants to edit; the other indicator rows need to be deleted before uploading. Previously provided values will not be edited if the subsequent CSV file does not include these indicator rows (see scenario below).

Alternatively, the reporting manager could provide CSV files to users to populate and upload that only include the indicator rows relevant to this user.

Solution: The downloaded file is used separately by 2 users to populate different sets of indicators						
CSV file	CSV file upload1 by user1 (only for Water)					
INDICATOR	VALUE					
WB1	1					
WB2						
WB3	2					
SB1						
SB2						
	•	by user2 (only for Sewage) – user 2 deletes the WB1 to WB3 rows before				
upload	ing					
INDICATOR	VALUE					
WB1		Please delete this row from the CSV before uploading				
WB2		Please delete this row from the CSV before uploading				
WB3		Please delete this row from the CSV before uploading				
SB1	3					
SB2	4					
		portal the only values that are edited are the values for indicators that				
are represented as a row in the CSV file.						
INDICATOR	VALUE					
WB1	1					
WB2						
WB3	2					
SB1	3					
SB2	4					

5. From the Upload CSV window, click **Browse** to locate your saved file then click **Upload CSV**.



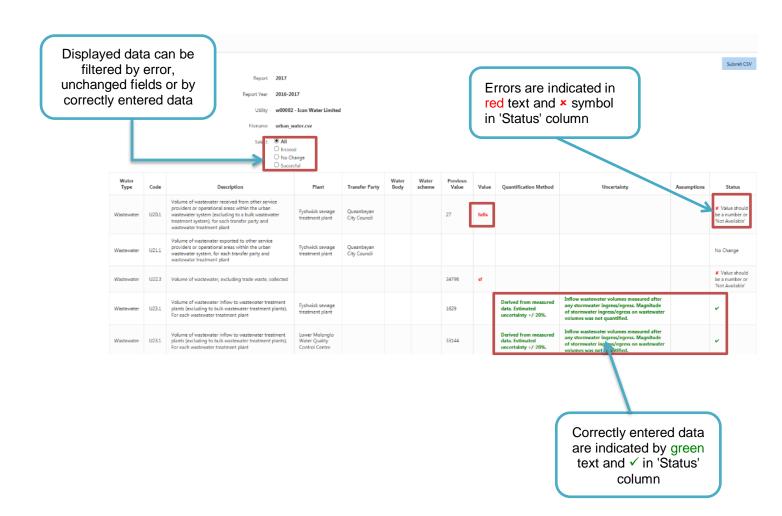


Once a file is uploaded the Review CSV page is shown. Correctly entered new data is
indicated in green text. Errors are indicated in red text with a x symbol. You may also
see some values in yellow; these values are valid but have failed the validation tests
for this Indicator.

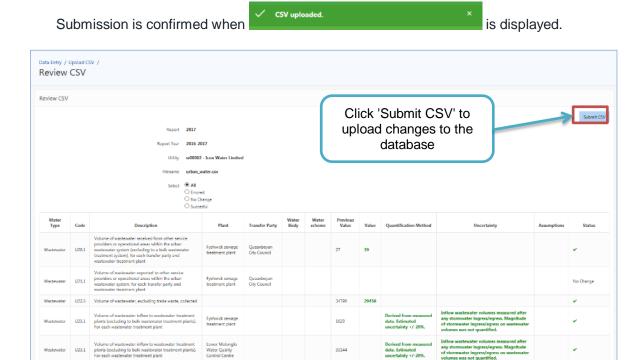
Blanks in the csv which result in over-writing an existing value will appear here as an warning). Note: review results can be filtered for "errored" and "warning" to check no data is being over-written.

Current Value	New Value	Comment	DOI Comment	Indicator Comment	Status
123			Test		✓ Warning You have removed an entered value

Take note of information in the 'Status' column, as this will provide some explanation for errors and warnings. If needed re-edit your CSV file and upload again. You can get back to the upload using the back button on your browser.



7. To submit the changes click the 'Submit CSV' button on the top right. Data that is flagged as an error, in red, will not be uploaded to the database, however all other changes will be, including yellow warnings. You can submit your data even if there are some red errors shown, these values for those indicators will be ignored; i.e. not entered into the portal.

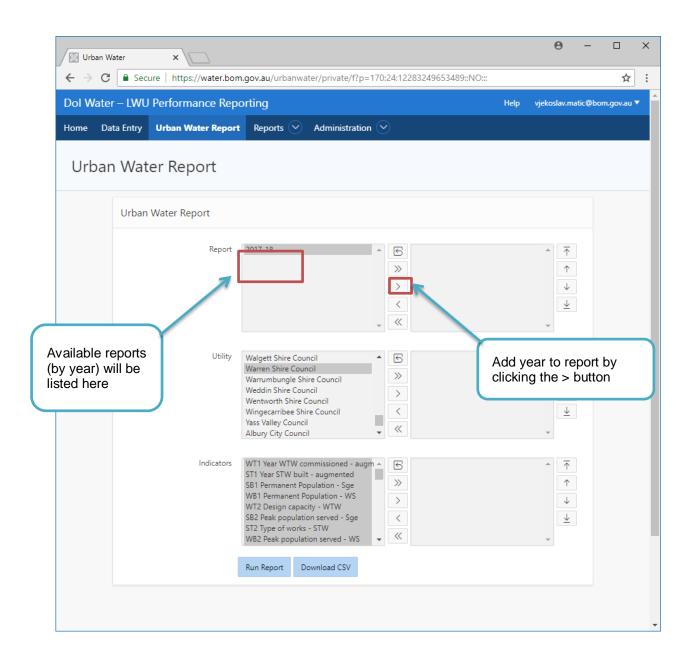


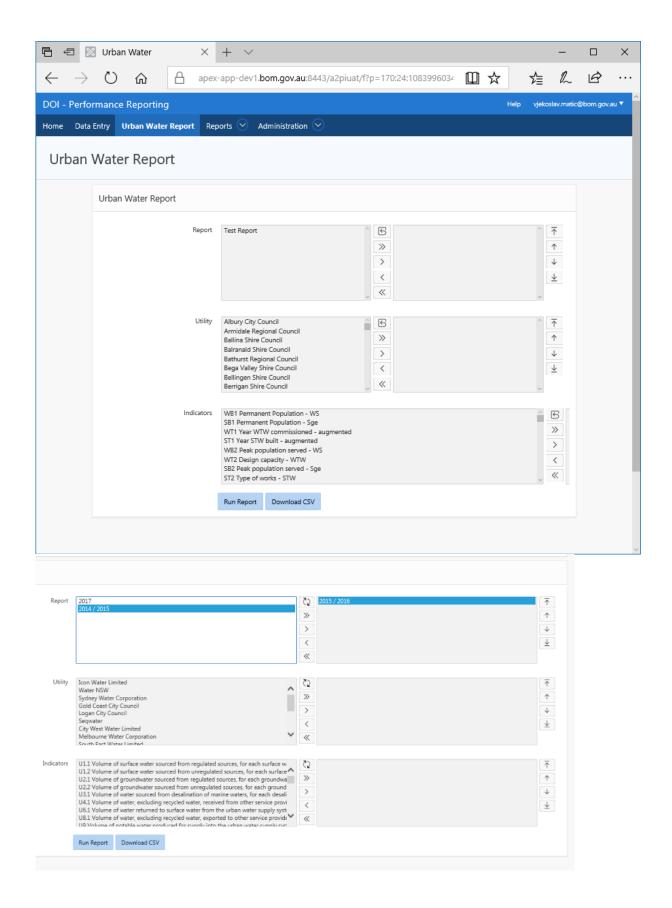
4 Water Reports

4.1 Constructing a data report

A data report can be downloaded for nominated agencies and report year/s using the Water Report page. To create a data report:

- Select relevant years, utilities and Indicators for the report. Items on the left hand side are available for selection; items on the right hand side will be included in the generated report.
- 2. Add or remove items by selecting them and pressing the '>' or '<' buttons respectively. To add or remove all items use the '>>' or '<<' buttons.
- 3. Derived indicators can also be added to the report and will be listed in the indicator list





3. The data report can be displayed on screen by clicking 'Run Report' and/or exported as a csv file.

The example below show the report generated for Albury City Council, Armidale Regional Council and Ballina Shire Council, for all indicators.

By pressing "Run Report" data for the selected items will appear at the bottom of the screen. Alternatively, the report can be exported as a downloadable csv file.

