

Windsor Solutions, Inc.

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**SLEIS**

# FACILITY TRAINING GUIDE

SLEIS Version 2.5

SLEIS Training Guide – Facility Application

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**Updated: November 2019**



**WINDSOR**  
SOLUTIONS

Environmental +  
Health Information  
Systems

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# Version Control

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Date	Author	Changes	Version
03/2015	Windsor Solutions	Initial version.	1.0
05/2015	Windsor Solutions	Added Submit EPA Data section.	1.1
01/2017	Windsor Solutions	Updated for SLEIS version 1.7	1.2
06/2017	Windsor Solutions	Updated for SLEIS version 2.0	1.3
04/2019	Windsor Solutions	Corrected typos, modified reference in summary reporting section	1.3
10/2019	Windsor Solutions	Updated for SLEIS version 2.5 to include section for Manage Companies	2.5

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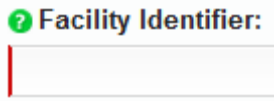
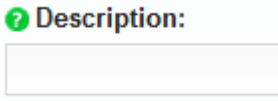
# Introduction

The purpose of this document is to provide instruction in the use of the application of the State and Local Emissions Inventory System (SLEIS).

## Data Entry Overview

### Page Fields

Each data entry field can be set as *required*, *optional*, or *read-only*. The following UI styles/conventions are used across SLEIS data entry pages:

Field Type	Description
Required	<p>All fields with a red vertical bar indicate a value is required before a successful save can be performed for the current record.</p> <p></p>
Optional	<p>The field does not require a value before a successful save can be performed for the current record. An Optional field may also be a Conditionally Required field.</p> <p></p>
Conditionally Required	<p>Depending on the contents, or lack thereof, of other field(s) on the page, an Optional field may require a value before a successful save can be performed for the current record.</p>
Read-only	<p>The field is displayed for information purposes only, and cannot physically be edited. <i>Read-only</i> fields are typically displayed as labels on the page, but may be made <i>read-only</i> based on the contents/selections of other fields on the page. In this case, the formally editable field is disabled and/or grayed-out, and does not allow editing of the field value.</p>

## SLEIS Homepage

The SLEIS Homepage is the main landing page and includes:

- The application header containing the *Home*, *Help*, and *Login* links (links available prior to login)

- The *Welcome* section containing general information about your installation and links to documents and relevant information. There is also a *Submit general questions and/or comments* link to allow anonymous submissions of feedback.
- The *News* section on the right containing links to detailed news item text

## Submit Questions/Comments

Submit questions, comments, or help requests to the SLEIS system administrator of your regulating agency.

#	Step	Results
1	Open the SLEIS Homepage.	The SLEIS Homepage is displayed.
2	In the <i>Welcome</i> section, click the <i>Submit general questions and/or comments</i> link	The <i>Submit General Questions and/or Comments</i> page is displayed.
3	Enter one or more lines of text containing your comment or question (please include your name and contact information) in the <i>Message</i> textbox and click the <i>Send</i> button.	An email will be sent to the SLEIS administrator of your regulating agency. The SLEIS Homepage is displayed. A confirmation message will be displayed at the top of the window confirming, "Your message was successfully sent."

## Login to SLEIS

#	Step	Results
1	Open the SLEIS Homepage.	The SLEIS Homepage is displayed.
2	Click the <i>Login</i> link in the application header.	The <i>Login</i> page is displayed.
3	Enter the following: <ul style="list-style-type: none"> <li>• <i>Email Address</i>: [Your email address]</li> <li>• <i>Password</i>: [Your SLEIS account password]</li> </ul> Then click the <i>Login</i> button.  In the event you have forgotten your password, refer to the <b>Request Password Reset</b> section, below.	You are logged into SLEIS.  The application header contains your full name in the upper-right corner.  The Facility or Company Homepage is displayed.  NOTE: If your regulating agency uses security questions as an additional identity check and your account has been set up by as an account that will be electronically signing/submitted reports and you have not previously provided security question answers, you will be notified by the system: "You have not yet configured your Electronic Signature Challenge Questions required for submission. Please update your user profile under My Profile".  Refer to the <a href="#">Edit My Profile</a> section, below, for details on providing the security question answers.

## Edit My Profile

#	Step	Results
1	Log into the application if not already logged in.	
2	Click the <i>My Profile</i> link in the application header.	The <i>User Profile</i> page is displayed.
3	<p>Enter the following:</p> <ul style="list-style-type: none"> <li>• <i>Full Name</i>: [Your full name]</li> <li>• <i>Title</i>: [Your title]</li> <li>• <i>Organization</i>: [Your organization/company name]</li> <li>• <i>Contact</i>: [Your email, phone, mobile, fax, or other contact methods]</li> </ul> <p>NOTE: If your account has been set up by the regulating agency as an account that will be electronically signing/submitted reports and you have not previously provided security question answers and your agency requires them, you must provide security question answers, as follows:</p> <ul style="list-style-type: none"> <li>• You must answer five security questions</li> <li>• Each answer must be five characters or more</li> <li>• Each question can only be used once</li> <li>• Each answer must be unique for your account</li> </ul> <p>Then click the <i>Save</i> button.</p>	<p>You will be returned to the page you were on where My Profile was selected.</p> <p>The following message is displayed:</p> <p>“The user profile was successfully updated.”</p>

## Request a Password Reset

In the event you have forgotten your password, or require your password to be reset, follow the instructions below.

#	Step	Results
1	On the Login page, click the <i>Forgot Password?</i> link.	The <i>Request Password Reset</i> page is displayed.
2	<p>Enter the following:</p> <ul style="list-style-type: none"> <li>• <i>Email Address</i>: [Your email address]</li> </ul> <p>Then click the <i>Submit</i> button.</p>	<p>The SLEIS Homepage is displayed.</p> <p>The following message is displayed:</p> <p>“Your password reset request has been sent. Please check your email for further instructions.”</p> <p>NOTE: If your account has been set up by the regulating agency as an account that will be electronically signing/submitted reports and you have previously provided security question answers and your agency requires them, you will be required to successfully answer a security question before submitting your password reset request.</p>

#	Step	Results
3	Close the current SLEIS browser window or browser tab page.	The SLEIS Homepage is closed.
4	Go to your email client (e.g., MS Outlook) and look for a message from SLEIS titled "SLEIS: Password Reset Request."  Open the message.	Message is opened.  Message will contain a password reset link.
5	Click on the password reset link.	The <i>Reset Password</i> page is displayed in your browser.
6	Enter the following: <ul style="list-style-type: none"> <li>• <i>Enter new password:</i> [valid password]</li> <li>• <i>Confirm new password:</i> [valid password]</li> </ul> Then click the <i>Submit</i> button.  NOTE: The password strength requirements are determined by your agency administrators. By default your password must be at least 8 characters, and no more than 30 characters, and must include at least one upper case letter, one lower case letter, and one numeric digit.  Passwords cannot be re-used for the same account.	The <i>Login</i> page is displayed.  The following message is displayed:  "Your password has been reset. Please login to the system with your email address and new password."  You will also receive a confirmation email from SLEIS confirming your successful password reset.



# Facility Management

## Facility Homepage (My Facilities)

This is the main “dashboard” for a facility user. The Facility Homepage provides access to the reports for each facility to which you are assigned a role.

NOTE: For users whose regulating agency has enabled the use of the company management feature, the main “dashboard” will be the company homepage, as outlined in the [Company Management](#) section of this document. You will know if your regulating agency has this enabled because the first screen you will see after logging in will be the *My Companies* homepage.

In the top right corner of the Facility Homepage is the facility application header containing links for *Home, My Facilities, My Profile, Help, and Logout.*

The main section of the facilities homepage contains a list of facilities associated with the user account. The columns in this list are as follows:

- Identifier: the unique identifier of the facility
- Name: the name of the facility
- Roles: the user role(s) for that facility

The possible facility user roles that may be assigned:

- **Viewer:** Can view the contents of a report, but cannot make any data modifications.

OR


- **Editor:** Can view and start/modify the contents of a report (i.e., can modify facility inventory and emissions data).




Plus zero or more of the following roles:

- **Submitter:** Can initiate the report submission process (e.g., the responsible official)
- **Administrator:** Someone with the Administrator role for a facility can remove users from the facility (this does not physically delete the account, just removes the association with the facility) and change a user's role who is assigned to the same facility as the user with the Administrator role.
- The “Ready for Submission” indicator
- The *Actions* button for accessing a facility’s reports

## Edit Facility User Role

This function allows users with Administrator role to edit users’ roles or remove users’ access to a facility.

#	Steps to Perform	Expected Results
1	On the Facility Homepage screen, click the <i>Open</i> icon  for the facility whose users will be edited or removed.	The <i>My Reports</i> page is displayed listing reports available for editing, along with their due date, submitted date, and report status. Click on any of the headers if you wish to change the sort order of the list.



#	Steps to Perform	Expected Results
2	Under the <i>Authorized Facility Users</i> section on the right side of the screen, click the <i>View Facility Users</i> link.	The <i>Facility Users</i> page is displayed for the current facility. A list is displayed containing Facility users associated with the current facility, their roles, and current account status.
3	To edit a user, select the user from the list then click the <i>Edit</i> icon. 	The <i>User Profile</i> page will be opened in edit mode.
4	The facility users can have the following roles assigned to them: <ul style="list-style-type: none"> <li>Viewer: Can view the contents of a report, but cannot make any data modifications.</li> </ul> <u>OR</u> <ul style="list-style-type: none"> <li>Editor: Can view and start/modify the contents of a report (i.e., can modify facility inventory and emissions data).</li> </ul> Plus zero or more of the following roles: <ul style="list-style-type: none"> <li>Submitter: Can initiate the report submission process (e.g., the responsible official)</li> <li>Administrator: Someone with the Administrator role for a facility can remove users from the facility (this does not physically delete the account, just removes the association with the facility) and change a user's role who is assigned to the same facility as the user with the Administrator role.</li> </ul>	
5	When finished updating user details and/or role(s) have been updated, click the <i>Save</i> button.	You will be returned to the <i>Facility Users</i> page. The message "The user profile was successfully updated." is displayed.
6	Click the application <i>last/back</i> icon  to return to the Facility Homepage.	The Facility Homepage is displayed.
<b>NOTE:</b>		
<ul style="list-style-type: none"> <li>The <i>Submitter</i> role will be disabled and not available for selection if the user has not had their electronic signature credentials verified by the regulating agency.</li> <li>Deleting a user from a facility, using the delete user icon , does not physically delete the user's account, but simply removes the user's association with the facility.</li> </ul>		


## Managing Facility Inventory

### Edit Facility Information

This function allows users with the *Editor* role to enter facility information, including mailing/location address, contacts, alternate names, and any additional custom information defined by the agency.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

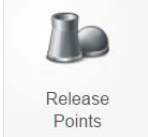
#	Steps to Perform	Expected Results
1	On the Facility Homepage screen, click the <i>Open</i> icon  of the facility to be edited.	The <i>My Reports</i> page is displayed listing reports available for editing, along with their due date, submitted date, and report status. Click on any of the headers if you wish to change the sort order of the list.
2	Click the <i>Open</i> icon for the report year to be edited.	The <i>Emission Report</i> homepage is displayed with a <i>Facility Inventory</i> section at the top and an <i>Emissions</i> section down below.
3	In the <i>Facility Inventory</i> section at the top, click the <i>Facility</i> icon. 	The <i>General Facility Information</i> page is opened in read-only (view) mode.
4	In the lower right corner of the screen, click the <i>Edit</i> button.	The <i>General Facility Information</i> page is displayed in edit mode.
5	<p>Enter values for required fields and any other known/needed information, for example:</p> <p><u>Contacts Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Name:</b> [YOUR FULL NAME]</li> <li>• <b>Contact Method:</b> <i>Phone</i> (select from drop-down)</li> <li>• <b>Contact Value:</b> [ENTER YOUR PHONE, INCLUDING AREA CODE, FORMATTED AS (###) ###-####]</li> </ul> <p><u>Addresses Tab</u></p> <p>Location</p> <ul style="list-style-type: none"> <li>• <b>Line 1:</b> 123 MAIN ST.</li> <li>• <b>Line 2:</b> [LEAVE BLANK]</li> <li>• <b>Locality:</b> [CITY]</li> <li>• <b>State:</b> [STATE]</li> <li>• <b>Zip:</b> [ZIP CODE]</li> </ul> <p>Mailing</p> <ul style="list-style-type: none"> <li>• <b>Line 1:</b> 400 COLLINS RD.</li> <li>• <b>Line 2:</b> SUITE 200</li> <li>• <b>Locality:</b> [CITY]</li> <li>• <b>State:</b> [STATE]</li> <li>• <b>Zip:</b> [ZIP CODE]</li> </ul> <p><u>Location Tab</u></p> <ul style="list-style-type: none"> <li>• Latitude: [LATITUDE]</li> <li>• Longitude: [LONGITUDE]</li> <li>• UTM X: [AUTOMATICALLY CALCULATED]</li> <li>• UTM Y: [AUTOMATICALLY CALCULATED]</li> <li>• UTM Zone: [AUTOMATICALLY CALCULATED]</li> <li>• [Other fields as required]</li> </ul> <p><u>Additional Information Tab</u></p> <ul style="list-style-type: none"> <li>• Review tab, enter any known/required field values</li> </ul> <p>Click the <i>Save</i> button.</p>	<p>After entering data and clicking the <i>Save</i> button, depending on the data entered for the record, you may receive “Validation error. Please correct issues on all highlighted tabs and then save your changes again.” displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>
6	If needed, correct business rules errors until successfully saved.	Informational message “The facility was successfully saved.” is displayed.



#	Steps to Perform	Expected Results
7	Click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> page is displayed.







## Add/Edit Release Points

This function allows users with the *Editor* role to add/edit Release Point information for the facility, location of the release point at the facility, and additional, custom information defined by the agency.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

#	Steps to Perform	Expected Results
1	On the <i>Emission Report</i> homepage, click the <i>Release Points</i> button. 	<p>The <i>Release Points</i> list page displays a list of records associated with the facility.</p> <p>The columns displayed in the list page can be sorted by clicking on the column heading (toggle ascending and descending order).</p> <p>The <i>Filter</i> textbox can be used to narrow the list of records on that screen to only those matching the filter text.</p>
2	Click the <i>Add</i> button located in the lower-right of the list page.	The <i>Release Point</i> page is displayed in add mode.
3	<p>To add a new release point that is not a <i>fugitive</i> type, enter values for required fields and any other known/needed information, for example:</p> <p><u>Release Point Tab</u></p> <ul style="list-style-type: none"> <li>• Identifier: 106-999 (unique value; depending on configuration, identifier may be system-generated and read-only)</li> <li>• Type: Vertical</li> <li>• Description: BLDG. 106 BOILER 1 STACK 999</li> <li>• Status: Operating</li> <li>• Status Date: [LEAVE BLANK]</li> <li>• Stack Height: 42</li> <li>• Stack Shape: Circular</li> <li>• Stack Diameter: 2.5</li> <li>• Exit Gas Temp: 380</li> <li>• Exit Gas Flow Rate: 6185 ACTUAL CUBIC FEET PER MINUTE (Exit Gas Velocity will be auto-calculated)</li> <li>• Exit Gas Velocity: 21 FEET PER SECOND</li> <li>• Fence Line Distance: [LEAVE BLANK]</li> </ul> <p><u>Location Tab</u></p> <p>Either utilize "Release Point utilizes facility coordinates" function or enter details:</p> <ul style="list-style-type: none"> <li>• Latitude: [LATITUDE]</li> <li>• Longitude: [LONGITUDE]</li> <li>• UTM X: [AUTOMATICALLY CALCULATED]</li> <li>• UTM Y: [AUTOMATICALLY CALCULATED]</li> </ul>	<p>After entering data and clicking the Save button, depending on the data entered for the record, you may receive "Validation error. Please correct issues on all highlighted tabs and then save your changes again." displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>


#	Steps to Perform	Expected Results
	<ul style="list-style-type: none"> <li>UTM Zone: [AUTOMATICALLY CALCULATED]</li> <li>[Other fields as required]</li> </ul> <u>Additional Information Tab</u> <ul style="list-style-type: none"> <li>Review tab, enter any known/required field values</li> </ul> Click the <i>Save</i> button.	
4	If needed, correct business rules errors until successfully saved.	<p>Informational message “The release point was successfully saved.” is displayed.</p> <p>The <i>Release Points</i> list page displays a list of records associated with the facility. The record just added will now appear in the list.</p>
5	Click the <i>Add</i> button to add another release point of <i>fugitive</i> type.	The <i>Release Point</i> page is displayed in add mode.
6	<p>Enter values for required fields and any other known/needed information, such as:</p> <p><u>Release Point Tab</u></p> <ul style="list-style-type: none"> <li><b>Identifier:</b> 106-000 (unique value; depending on configuration, identifier may be system-generated and read-only)</li> <li><b>Type:</b> <i>Fugitive</i></li> <li><b>Description:</b> BLDG. 106 FUGITIVE EMISSIONS</li> <li><b>Status:</b> <i>Operating</i></li> <li><b>Fugitive Height:</b> [LEAVE BLANK]</li> <li><b>Fugitive Width:</b> [LEAVE BLANK]</li> <li><b>Fugitive Length:</b> [LEAVE BLANK]</li> <li><b>Fugitive Angle:</b> [LEAVE BLANK]</li> </ul> <p><u>Location Tab</u></p> <ul style="list-style-type: none"> <li><b>Latitude:</b> [LATITUDE]</li> <li><b>Longitude:</b> [LONGITUDE]</li> <li><b>UTM X:</b> [AUTOMATICALLY CALCULATED]</li> <li><b>UTM Y:</b> [AUTOMATICALLY CALCULATED]</li> <li><b>UTM Zone:</b> [AUTOMATICALLY CALCULATED]</li> <li>[Other fields as required]</li> </ul> <p><u>Additional Information Tab</u></p> <ul style="list-style-type: none"> <li>Review tab, enter any known/required field values</li> </ul> Click the <i>Save</i> button.	<p>After entering data and clicking the <i>Save</i> button, depending on the data entered for the record, you may receive “Validation error. Please correct issues on all highlighted tabs and then save your changes again.” displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>
7	If needed, correct business rules errors until successfully saved.	Informational message “The release point was successfully saved.” is displayed.
8	Click the application <i>last/back</i> icon  to return to the <i>Release Points</i> list page.	The <i>Release Points</i> list page is displayed, displaying a list of records associated with the facility. The record just added will now be displayed in the list.
9	Review a release point record in view mode by clicking the <i>view</i> icon  located adjacent to the record.	The <i>Release Points</i> page is displayed in view mode for the selected record.






#	Steps to Perform	Expected Results
10	Click the application <i>last/back</i> icon  to return to the <i>Release Points</i> list page.	The <i>Release Points</i> list page is displayed, displaying a list of records associated with the facility.
11	Update a release point in edit mode by clicking the <i>edit</i> icon  located adjacent to the record.	The <i>Release Points</i> page is displayed in edit mode for the selected record. Click Save or Cancel to return to the <i>Release Points</i> list page.
12	Click the application <i>last/back</i> icon  to return to the <i>Release Points</i> list page.	The <i>Release Points</i> list page is displayed, displaying a list of records associated with the facility.
13	Click the <i>Export</i> button  located in the lower-left of the list page.	All Release Point records associated with the facility will be downloaded into a series of .csv files, and compressed as a .ZIP file. The .ZIP file will be downloaded using your browser's native file download capability.
14	Open the .ZIP file and explore the contents of the file to see how the export function arranges exported data for this record type.	
15	In the application, click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> page is displayed.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>A Release Point record can only be deleted from a report if the Release Point has never been promoted to the Master Facility Inventory (thus making it a child of the Master Facility Inventory). The application will hide the <i>delete</i> icon  if the record cannot be deleted.</li> </ul>		






## Add/Edit Control Devices

This function allows users with the *Editor* role to add/edit Control Device information for the facility, including general control device information, controlled pollutants, and any additional custom information defined by the agency.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

#	Steps to Perform	Expected Results
1	On the Emission Report homepage, click the <i>Control Devices</i> button. 	<p>The <i>Control Devices</i> list page displays a list of records associated with the facility.</p> <p>The columns displayed in the list page can be sorted by clicking on the column heading (toggle ascending and descending order).</p> <p>The <i>Filter</i> textbox can be used to narrow the list of records on that screen to only those matching the filter text</p>
2	Click the <i>Add</i> button located in the lower-right of the list page.	The <i>Control Device</i> page is displayed in add mode.
3	Enter values for required fields and any other known/needed information, for example:	After entering data and clicking the <i>Save</i> button, depending on the data entered for the record, you may

#	Steps to Perform	Expected Results
	<p><u>Control Device Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Identifier:</b> 106-999-01 (unique value; depending on configuration, identifier may be system-generated and read-only)</li> <li>• <b>Description:</b> SCR- FOR NH3</li> <li>• <b>Status:</b> Operating</li> <li>• <b>Status Date:</b> [LEAVE BLANK]</li> <li>• <b>Control Measure:</b> 139 – Selective Catalytic Reduction (SCR) (enter by typing all or part of the code or code description and select a value from the list)</li> </ul> <p>Controlled Pollutants</p> <ul style="list-style-type: none"> <li>• Pollutant: NH3 Ammonia (enter by typing all or part of the code (or CAS#) or description and select a value from the list)</li> <li>• Pollutant Reduction Efficiency: 50%</li> </ul> <p>Click the <i>add pollutant</i> icon  to add additional rows to the Controlled Pollutants section, and enter data for the new controlled pollutant(s). To delete a row, click the <i>delete</i> icon .</p> <ul style="list-style-type: none"> <li>• <b>Identifier:</b> 106-999-02 (or system-generated)</li> <li>• <b>Description:</b> PCC – FOR NOX</li> <li>• <b>Status:</b> Operating</li> <li>• <b>Status Date:</b> [LEAVE BLANK]</li> <li>• <b>Control Measure:</b> 149 – Pre-Combustion Chamber (enter by typing all or part of the code or code description and select a value from the list)</li> </ul> <p>Controlled Pollutants</p> <ul style="list-style-type: none"> <li>• Pollutant: NOX (enter by typing all or part of the code (or CAS#) or description and select a value from the list)</li> <li>• Pollutant Reduction Efficiency: 70%</li> </ul> <p><u>Additional Information Tab</u></p> <ul style="list-style-type: none"> <li>• Review tab, enter any known/required field values</li> </ul> <p>Click the <i>Save</i> button.</p>	<p>receive “Validation error. Please correct issues on all highlighted tabs and then save your changes again.” displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>
4	If needed, correct business rules errors until successfully saved.	Informational message “The control device was successfully saved.” is displayed.
5	Click the application <i>last/back</i> icon  to return to the <i>Control Devices</i> list page.	The <i>Control Devices</i> list page displays a list of records associated with the facility. The record just added will now appear in the list.
6	Review a control device record in view mode by clicking the <i>view</i> icon  located adjacent to the record.	The <i>Control Devices</i> page is displayed in view mode for the selected record.
7	Click the application <i>last/back</i> icon  to return to the <i>Control Devices</i> list page.	The <i>Control Devices</i> list page displays a list of records associated with the facility.

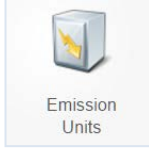




#	Steps to Perform	Expected Results
8	Update a control device in edit mode by clicking the <i>edit</i> icon  located adjacent to the record.	The <i>Control Devices</i> page is displayed in edit mode for the selected record. Click Save or Cancel to return to the <i>Control Devices</i> list page.
9	Click the application <i>last/back</i> icon  to return to the <i>Control Devices</i> list page.	The <i>Control Devices</i> list page displays a list of records associated with the facility.
10	Click the <i>Export</i> button  located in the lower-left of the list page.	All Control Device records associated with the facility will be downloaded into a series of .csv files, and compressed as a .ZIP file. The .ZIP file will be downloaded using your browser's native file download capability.
11	Open the .ZIP file and explore the contents of the file to see how the export function arranges exported data for this record type.	
12	In the application, click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> page is displayed.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>A control device record can only be deleted from a report if the control device has never been promoted to the Master Facility Inventory (thus making it a child of the Master Facility Inventory). The application will hide the <i>delete</i> icon  if the record cannot be deleted.</li> </ul>		







## Add/Edit Emission Units

This function allows users with the *Editor* role to add/edit Emission Units information for the facility, including general emission unit information, and additional, custom information defined by the agency.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.





#	Steps to Perform	Expected Results
1	<p>On the Emission Report homepage, click the <i>Emission Units</i> button.</p> 	<p>The <i>Emission Units</i> list page displays a list of records associated with the facility.</p> <p>The columns displayed in the list page can be sorted by clicking on the column heading (toggle ascending and descending order).</p> <p>The <i>Filter</i> textbox can be used to narrow the list of records on that screen to only those matching the filter text</p>
2	Click the <i>Add</i> button located in the lower-right of the list page.	The <i>Emission Units</i> page is displayed in add mode.
3	<p>Enter values for required fields and any other known/needed information, for example:</p> <p><u>Emission Unit Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Identifier:</b> 106-999-01 (unique value; depending on configuration, identifier may be system-generated and read-only)</li> <li>• <b>Type:</b> Boiler</li> <li>• <b>Description:</b> BLDG. 106 BOILER 1</li> <li>• <b>Status:</b> Operating</li> <li>• <b>Status Date:</b> [LEAVE BLANK]</li> <li>• <b>Operation Start Date:</b> [SELECT TODAY'S DATE]</li> <li>• [Other fields as required]</li> </ul> <p><u>Additional Information Tab</u></p> <ul style="list-style-type: none"> <li>• Review tab, enter any known/required field values</li> </ul> <p>Click the <i>Save</i> button.</p>	<p>After entering data and clicking the <i>Save</i> button, depending on the data entered for the record, you may receive "Validation error. Please correct issues on all highlighted tabs and then save your changes again." displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>
4	If needed, correct business rules errors until successfully saved.	Informational message "The emission unit was successfully saved." is displayed.
5	Click the application <i>last/back</i> icon  to return to the <i>Emission Units</i> list page.	The <i>Emission Units</i> list page displays a list of records associated with the facility.
6	Review an emission unit record in view mode by clicking the <i>view</i> icon  located adjacent to the record.	The <i>Emission Units</i> page is displayed in view mode for the selected record.
7	Click the application <i>last/back</i> icon  to return to the <i>Emission Units</i> list page.	The <i>Emission Units</i> list page displays a list of records associated with the facility.
8	Update an emission unit in edit mode by clicking the <i>edit</i> icon  located adjacent to the record.	The <i>Emission Units</i> page is displayed in edit mode for the selected record. Click <i>Save</i> or <i>Cancel</i> to return to the <i>Emission Units</i> list page.











#	Steps to Perform	Expected Results
9	Click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> page is displayed.
10	Click the <i>Export</i> button  located in the lower-left of the list page.	All Emission Units records associated with the facility will be downloaded into a series of .csv files, and compressed as a .ZIP file. The .ZIP file will be downloaded using your browser's native file download capability.
11	Open the .ZIP file and explore the contents of the file to see how the export function arranges exported data for this record type.	
12	In the application, click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> is displayed.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>An Emission Unit record can only be deleted from a report if the Emission Unit has never been promoted to the Master Facility Inventory (thus making it a child of the Master Facility Inventory). The application will hide the <i>delete</i> icon  if the record cannot be deleted.</li> </ul>		


## Add/Edit Unit Processes

This function allows users to edit process and emissions data being reported in the current reporting year.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

#	Steps to Perform	Expected Results
1	<p>On the Emission Report homepage, click the <i>Unit Process</i> button.</p> 	<p>The <i>Unit Processes</i> list page displays a list of records associated with the facility.</p> <p>The columns displayed in the list page can be sorted by clicking on the column heading (toggle ascending and descending order).</p> <p>The <i>Filter</i> textbox can be used to narrow the list of records on that screen to only those matching the filter text</p>
2	<p>Click the <i>Add</i> button located in the lower-right of the list page.</p>	<p>The <i>Unit Processes</i> page is displayed in add mode.</p>
3	<p>Enter values for required fields and any other known/needed information, for example:</p> <p><u>Unit Process Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Process Identifier:</b> 106-999-01 (depending on configuration, identifier may be system-generated and read-only)</li> <li>• <b>Emission Unit Identifier:</b> 106-999-01[SELECT NEWLY-CREATED EMISSION UNIT]</li> <li>• <b>SCC Code:</b> 10100101 <ul style="list-style-type: none"> <li>○ External Combustion Boilers</li> <li>○ Electric Generation</li> <li>○ Anthracite Coal, Pulverized</li> <li>○ Boiler</li> </ul> </li> <li>• <b>Description:</b> Coal Boiler</li> <li>• <b>Last/Final Emission Year:</b> [LEAVE BLANK]</li> </ul> <p><u>Regulatory Programs Tab (if enabled)</u></p> <ul style="list-style-type: none"> <li>• <b>Regulatory Program:</b> R63-0014 – Aerospace Coatings (enter by typing all or part of the code or description and select a value from the list)</li> </ul> <p>To add multiple regulatory programs, click <i>add</i> icon . To delete a row, click the <i>delete</i> icon .</p> <p><u>Control Approach Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Not Controlled?:</b> Unchecked/False (default)</li> <li>• <b>Control Approach Description:</b> BOILER 1 CONTROLS</li> <li>• <b>Control Devices:</b> 106-999-01 (SELECT NEWLY-CREATED CONTROL DEVICE FOR NH3 )</li> </ul> <p>Click the <i>add</i> icon  to add another control device.</p>	<p>After entering data and clicking the <i>Save</i> button, depending on the data entered for the record, you may receive “Validation error. Please correct issues on all highlighted tabs and then save your changes again.” displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>

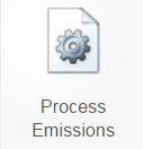

#	Steps to Perform	Expected Results
	<ul style="list-style-type: none"> <li><b>Control Devices: 106-999-02 (SELECT NEWLY-CREATED CONTROL DEVICE FOR NOX )</b></li> </ul> <p>To delete a row, click the <i>delete</i> icon .</p> <p><u>Release Point Apportionment Tab</u></p> <ul style="list-style-type: none"> <li>Release Point: 106-000 [SELECT NEWLY-CREATED FUGITIVE RELEASE POINT]</li> <li>Apportionment %: 5%</li> </ul> <p>Click the <i>add pollutant</i> icon  once to add one additional row to the Release Point Apportionment section, and enter data for the new row.</p> <ul style="list-style-type: none"> <li>Release Point: 106-999 [SELECT NEWLY-CREATED CIRCULAT STACK RELEASE POINT]</li> <li>Apportionment %: 95%</li> </ul> <p>To delete a row, click the <i>delete</i> icon .</p> <p><u>Additional Information Tab</u></p> <ul style="list-style-type: none"> <li>Review tab, enter any known/required field values</li> </ul> <p>Click the <i>Save</i> button.</p>	
4	If needed, correct business rules errors until successfully saved.	Informational message “The unit process was successfully saved.” is displayed.
5	Click the application <i>last/back</i> icon  to return to the <i>Unit Processes</i> list page.	The <i>Unit Processes</i> list page displays a list of records associated with the facility. The record just added will now appear in the list.
6	Review a unit process record in view mode by clicking the <i>view</i> icon  located adjacent to the record.	The <i>Unit Processes</i> page is displayed in view mode for the selected record.
7	Click the application <i>last/back</i> icon  to return to the <i>Unit Processes</i> list page.	The <i>Unit Processes</i> list page displays a list of records associated with the facility.
8	Update a unit process in edit mode by clicking the <i>edit</i> icon  located adjacent to the record.	The <i>Unit Processes</i> page is displayed in edit mode for the selected record. Click <i>Save</i> or <i>Cancel</i> to return to the <i>Unit Processes</i> list page.
9	Click the application <i>last/back</i> icon  to return to the <i>Unit Processes</i> list page.	The <i>Unit Processes</i> list page displays a list of records associated with the facility.
10	Click the <i>Export</i> button  located in the lower-left of the list page.	All Unit Process records associated with the facility will be downloaded into a series of .csv files, and compressed as a .ZIP file. The .ZIP file will be downloaded using your browser’s native file download capability.
11	Open the .ZIP file and explore the contents of the file to see how the export function arranges exported data for this record type.	
12	In the application, click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> is displayed.



#	Steps to Perform	Expected Results
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>A Unit Process record can only be deleted from a report if the Unit Process has never been promoted to the Master Facility Inventory (thus making it a child of the Master Facility Inventory). The application will hide the <i>delete</i> icon  if the record cannot be deleted.</li> </ul>		



## Edit Process Emissions

This function allows users with the *Editor* role to edit process and emissions data being reported in the current reporting year.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

#	Steps to Perform	Expected Results
1	<p>From the Emission Report homepage, click the <i>Process Emissions</i> button in the <i>Emissions</i> section.</p> 	<p>The <i>Process Emissions</i> list page is displayed showing a list of records associated with the facility that require entry of emissions data for the reporting year.</p> <p>The columns displayed in the list page can be sorted by clicking on the column heading (toggle ascending and descending order).</p> <p>The <i>Filter</i> textbox can be used to narrow the list of records on that screen to only those matching the filter text</p>
2	<p>Click the <i>edit icon</i>  located adjacent to the process emissions record row for emission unit <i>106-999-01</i>, process <i>106-999-01</i> [or other newly-created emission unit and unit process].</p>	<p>The <i>Process Emissions</i> page is displayed in edit mode.</p>
3	<p>Enter values for required fields and any other known/needed information, for example:</p> <p><u>Process Tab</u></p> <ul style="list-style-type: none"> <li><b>Process is Reported?:</b> <i>Checked/True</i> (default)</li> <li><b>Annual Throughput:</b> <i>1000</i></li> <li><b>Throughput details:</b> <i>[select throughput options]</i></li> <li><b>Unit of Measure:</b> <i>TON - TONS</i></li> <li><b>Throughput Type:</b> <i>1 - Input</i></li> <li><b>Throughput Material:</b> <i>640 - Anthracite</i></li> <li><b>Process is CBI?:</b> <i>Unchecked/False</i> (default)</li> <li><b>Supplemental Calculation Parameters (Ash %, Sulfur %, etc.):</b> <i>[LEAVE BLANK]</i></li> </ul> <p><b>NOTE:</b> Throughputs could have varying types (Input/Output/Existing) depending upon the process.</p> <p><u>Operations Tab</u></p> <p><i>[ENTER OPERATIONS DETAILS]</i></p>	<p>Depending on the data entered for the record, you may receive "Validation error. Please correct issues on all highlighted tabs and then save your changes again." displayed at the top of your screen.</p> <p>All tab pages containing an error will contain an exclamation in the tab heading indicating an error exists on the tab.</p> <p>Examine each tab to determine the cause of the error and take appropriate corrective action.</p>

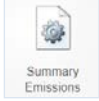


#	Steps to Perform	Expected Results
	<p><b>NOTE:</b> Depending on agency configuration, data entered for “Actual” fields must be within a predetermined range of calculated average.</p> <p><b>NOTE:</b> Seasonal or Monthly Operations must total 100%, +/- 0.5%. Fields cannot be blank, 0 must be entered in blank fields.</p> <p><u>Emissions Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>NH3 – Ammonia</i> (enter by typing all or part of the code or description and select a value from the list)</li> <li>• <b>Calculation Method:</b> <i>8.1 – EPA Emission Factor (post-control)</i></li> <li>• <b>Emission Factor (Lbs/Unit):</b> <i>(default)</i></li> <li>• <b>Emission Factor Unit:</b> <i>(default)</i></li> <li>• <b>Estimated Emissions (Tons):</b> [click the <i>Calculate</i> button, <i>Calculate All</i> button, or the <i>Save</i> button]</li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <p>Click the <i>add pollutant</i> icon  twice to add more pollutant records to the Emissions list, and complete data entry.</p> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>NOX – Nitrogen Oxides</i></li> <li>• <b>Calculation Method:</b> <i>6.2 S/L/T Speciation Profile (pre-control)</i></li> <li>• <b>Emission Factor (Lbs/Unit):</b> <i>0.32</i></li> <li>• <b>Emission Factor Unit:</b> <i>(default)</i></li> <li>• <b>Estimated Emissions (Tons):</b> [click the <i>Calculate</i> button, <i>Calculate All</i> button, or the <i>Save</i> button]</li> <li>• <b>Overall Control Efficiency (%):</b> <i>40%</i> (read-only) <ul style="list-style-type: none"> <li>○ Calculated based upon Unit Process Control Approach, and associated Control Devices and Controlled Pollutants</li> <li>○ Only applied to emissions calculation for pre-control emissions calculation methods</li> </ul> </li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>SO2 – Sulfur Dioxide</i></li> <li>• <b>Calculation Method:</b> <i>4.1 – Stack Test (post-control EF)</i></li> <li>• <b>Emission Factor (Lbs/Unit):</b> <i>1.7</i></li> <li>• <b>Emission Factor Unit:</b> <i>(default)</i></li> <li>• <b>Stack Test Date:</b> [ENTER DATE] <b>NOTE:</b> <i>this required field only displays if one of the Stack Test calculation methods is selected.</i></li> <li>• <b>Estimated Emissions (Tons):</b> [click the <i>Calculate</i> button, <i>calculate All</i> button, or the <i>Save</i> button]</li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <p>To delete a row, click the <i>delete</i> icon .</p> <p>Click the <i>Save</i> button.</p>	

#	Steps to Perform	Expected Results
4	If needed, correct business rules errors until successfully saved.	Estimated emissions are calculated, when applicable, and the <i>Process Emissions</i> data is saved. The user remains on the Process Emissions edit page.  Informational message "The process emission was successfully updated" is displayed.
5	When done editing Process Emission records, click the <i>Save</i> button, then the <i>Cancel</i> button or <i>last/back</i> icon to exit.	The <i>Process Emissions</i> list page is displayed.
6	Review a process emission record in view mode by clicking the <i>view</i> icon  located adjacent to the record.	The <i>Process Emissions</i> page is displayed in view mode for the selected record.
7	When done viewing Process Emission records, click the <i>last/back</i> icon to exit.	The <i>Process Emissions</i> list page is displayed.
8	In the application, click the application <i>last/back</i> icon  to return to the <i>Emission Report</i> page.	The <i>Emission Report</i> is displayed.

## Edit Facility Summary Emissions

If your agency has this feature enabled, this function allows users to edit facility-wide summary-level emissions data being reported in the current reporting year.

NOTE: some fields shown in the examples provided below may not be visible in your implementation of SLEIS and may be disregarded.

#	Steps to Perform	Expected Results
1	From the Report Homepage, click the <i>Summary Emissions</i> button in the <i>Emissions</i> section. 	The <i>Summary Emissions</i> page is displayed in read-only mode.
2	Click the <i>edit</i> icon.	The <i>Summary Emissions</i> page is displayed in edit mode.
3	<p>Enter values for required fields and any other known/needed information, for example:</p> <p><u>Summary Emissions Tab</u></p> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>NH3 – Ammonia</i> (enter by typing all or part of the code or description and select a value from the list)</li> <li>• <b>Estimated Emissions (Tons):</b> 35</li> <li>• <b>Tailpipe Emissions (Tons):</b> 0</li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <p>Click the <i>add pollutant</i> icon  twice to add more pollutant records to the Emissions list, and complete data entry.</p> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>VOC – Volatile Organic Compounds</i> (enter by typing all or part of the code or description and select a value from the list)</li> <li>• <b>Estimated Emissions (Tons):</b> 10</li> <li>• <b>Tailpipe Emissions (Tons):</b> 0</li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <ul style="list-style-type: none"> <li>• <b>Pollutant Code:</b> <i>CO2 – Carbon Dioxide</i> (enter by typing all or part of the code or description and select a value from the list)</li> <li>• <b>Estimated Emissions (Tons):</b> 50</li> <li>• <b>Tailpipe Emissions (Tons):</b> 50</li> <li>• <b>Comment:</b> [LEAVE BLANK]</li> </ul> <p>To delete a row, click the <i>delete</i> icon .</p> <p>Click the <i>Save</i> button.</p>	<p>Depending on the data entered for the record, you may receive “Validation error. Please correct issues on all highlighted tabs and then save your changes again.” displayed at the top of your screen.</p> <p>Examine the list of pollutants to determine the cause of the error and take appropriate corrective action.</p>
4	If needed, correct business rules errors until successfully saved.	<p><i>Summary Emissions</i> data is saved. The user remains on the <i>Summary Emissions</i> edit page.</p> <p>Informational message “The summary emission was successfully updated” is displayed.</p>
5	When done editing <i>Summary Emission</i> records, click the <i>Save</i> button, then the <i>Cancel</i> button or <i>last/back</i> icon to exit.	The <i>Summary Emissions</i> page is displayed in read-only mode.



## Data Import Process

In addition to manual entry of process emissions data as detailed in the [Edit Process Emissions](#) section, data can be entered into CSV files and imported into the SLEIS application. First, CSV templates are downloaded from the SLEIS application Emissions Report page. Next, emissions data is entered in the files. Last, the files are imported into SLEIS.

### Download and Complete Templates

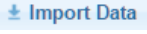
This function allows users to download CSV templates and enter data to be used for emissions data import. The facility inventory (release points, emission units, etc.) should be updated and completed before templates are downloaded.

#	Steps to Perform	Expected Results
1	From the SLEIS Application homepage, click on the link for <i>SLEIS File Import Specification</i> .	A document opens and displays information for the import and reference files. This file explains every field in the import files and specifies which fields must be completed and which to leave blank.
2	Navigate to the Emission Report homepage and click the <i>Download Template</i> button <a href="#">Download Template</a> in the <i>Emissions</i> section.	A zip file is opened which contains five files: <ul style="list-style-type: none"> <li>• ProcessEmissions.csv</li> <li>• Processes.csv</li> <li>• ProcessSupplementalParameters.csv</li> <li>• ReferenceDataValues.csv</li> <li>• ReferenceThroughputValues.csv</li> </ul>
3	Open the <i>ReferenceDataValues.csv</i> file.	The file is opened and displays codes and code descriptions that will be used when inputting data.
4	Open the <i>ReferenceThroughputValues.csv</i> file.	The file is opened and displays all possible valid throughput combinations based on Source Classification Code. This list is determined by your agency.
5	Open the <i>Processes.csv</i> file. This is one of the two required import files that will be uploaded into the SLEIS application and is where all data related to processes and operations are entered.	The <i>Processes.csv</i> file opens. The EmissionUnitId and ProcessId fields will be prepopulated; changing the data in these fields, or adding new rows at the end of the list, will cause validation errors during the import process.
6	Enter data.	<ul style="list-style-type: none"> <li>• Refer to the <i>SLEIS File Import Specification</i> document to determine which fields are required to have values, which should be left blank, and in what format data should be entered. (This document is located as a link on the SLEIS homepage.) <b>NOTE:</b> all required fields must have values in order to pass validation during the import process.</li> <li>• Refer to the <i>ReferenceThroughputValues.csv</i> file to determine valid throughput combinations for the ThroughputUnit, ThroughputType, and ThroughputMaterial fields. (Search for the SCC of current process, select the combination of values, then copy and paste those three values into <i>Processes.csv</i>.)</li> <li>• Refer to the <i>ReferenceDataValues.csv</i> file for the codes to use for Throughput Unit, Throughput Type, and Throughput Material.</li> </ul>

#	Steps to Perform	Expected Results
		<b>NOTE:</b> codes are case-sensitive, using <i>ton</i> instead of <i>TON</i> will result in a validation error during the import process.
7	After all required fields are filled, save the file in CSV format to your computer.	File saved to destination indicated. <b>NOTE:</b> if you intend to use the updated file for importing purposes, the file name should not be changed.
8	Open the <i>ProcessEmissions.csv</i> file. This is the second required import file that will be uploaded into the SLEIS application and is where data related to emissions are entered.	The <i>ProcessEmissions.csv</i> file opens. The EmissionUnitId and ProcessId fields will be prepopulated; changing the data in these fields, or adding new rows at the end of the list, will cause validation errors during the import process.
9	Enter data.	<ul style="list-style-type: none"> <li>Refer to the <i>SLEIS File Import Specification</i> document to determine which fields are required to have values, which should be left blank, and in what format data should be entered. <b>NOTE:</b> all required fields must have values in order to pass validation during the import process.</li> <li>Refer to the <i>ReferenceDataValues.csv</i> file for the codes to use for Pollutant, Calculation Method, and Emission Factor Unit.</li> </ul> <b>NOTE:</b> codes are case-sensitive, using <i>ton</i> instead of <i>TON</i> will result in a validation error during the import process.
10	After all required fields are filled, save the file in CSV format to your computer.	File saved to destination indicated. <b>NOTE:</b> if you intend to use the updated file for importing purposes, the file name should not be changed.
11	Open the <i>ProcessSupplementalParameters.csv</i> file. This is an optional import file where values for supplemental calculation parameters are entered.	The <i>ProcessSupplementalParameters.csv</i> file opens.
12	Enter data. After values are filled, save the file in CSV format to your computer.	File saved to destination indicated. <b>NOTE:</b> if you intend to use the updated file for importing purposes, the file name should not be changed.

## Import Data



This function allows users with the *Editor* role to import completed CSV template files into the SLEIS application.

#	Steps to Perform	Expected Results
1	On the Emission Report homepage, click the <i>Import Data</i> button. 	The <i>Select Import Files</i> page is displayed.
2	<p>Click the <i>Browse</i> button and navigate to the location where the newly-updated <i>Processes.csv</i> file is saved and select that file. Do the same for the <i>ProcessEmissions.csv</i> file.</p> <p>If there is data in the <i>ProcessSupplementalParameters.csv</i> file, do the same for that file, as well.</p> <p>Click the <i>Continue</i> button.</p> <p><b>NOTE:</b> Both required files, <i>Processes.csv</i> and <i>ProcessEmissions.csv</i>, need to be selected before the <i>Continue</i> button will become enabled.</p>	<p>If all required data was entered as specified in the <i>SLEIS File Import Specification</i> document and all values passed validation rules, a message will display at the top of the screen: "Successfully imported 1 process record(s) and 1 process emission record(s)."</p> <p>If there were errors, the Import File Validation screen will appear and indicate which errors occurred for which emission units and processes. At the bottom of the screen is a link to download the error report.</p> <p>Correct errors in the indicated file(s), save them to your computer, and follow the process to import the corrected files.</p>

## Report Actions



### Start Report

This function allows users to start a new emissions inventory report for the selected facility.

#	Steps to Perform	Expected Results
1	On the Facility Homepage screen, click the <i>Open</i> icon  of the facility report to be started.	<p>The <i>My Reports</i> page is displayed listing reports available for starting, viewing, or editing.</p> <p>NOTE: new reports are created by your agency and will appear here with the <i>start report</i> icon after generated. If an expected report does not appear, contact your agency's SLEIS Administrator.</p>
2	Click the <i>start report</i> icon  for the report to be started.	<p>The Emission Report page is displayed.</p> <p>The Master Facility Inventory, maintained by the regulating agency, will be copied to the newly started report as default values, and Process Emissions values from the most recent report will also be defaulted.</p>




### Validate Report

This function allows users with the *Editor* role to validate the current report and mark it as ready for submission.

#	Steps to Perform	Expected Results
1	From the Report Homepage, click the <i>Validate Report</i> button. 	The full set of application business rules will be run against the report contents, and the <i>Validation Report</i> page is displayed.  If no errors were encountered, the page will state, "No errors were encountered while validating your report."  If errors were encountered, a downloadable file detailing all error encountered on the report will be generated. Correct errors click <i>Validate Report</i> again.
2	If no errors were encountered and the report is ready for submission to the agency, click the "Mark as Ready for Submission?" link found in the right-hand column of the screen.	Marking a report as ready for submission will display that status in the "Ready for Submission" column on the My Facilities homepage.
3	Click the application <i>last/back</i> icon  to return to the Report Homepage.	The Report Homepage is displayed for the currently selected report.


## Submit Report

This function allows users with *Submitter* role to validate and submit the current report.

#	Steps to Perform	Expected Results
1	From the My Facilities homepage, find the report indicated as Ready for Submission. Click on the link.	The Emission Report Homepage is displayed.
2	From the Report Homepage, click the <i>Initiate Submission</i> button. 	The full set of application business rules will be run against the report.  If errors were encountered, a downloadable file detailing all error encountered on the report will be generated.
3	Next, click the <i>View Electronic Document</i> button. The document must be opened and reviewed before the report is submitted.	A PDF version of the report will open for review.
4	Click the <i>Continue</i> button. 	The Submission Agreements page is displayed.
5	Read the submission agreements and click in each box if the statement is true.  After clicking in each box, the <i>Continue</i> button will be enabled. Click the <i>Continue</i> button.	The Submission Signature page is displayed.
6	If your regulating agency requires it, you will be prompted to answer a security question and to re-enter your account password.  Click the <i>Continue</i> button.	The Submission Confirmation page is displayed.  NOTE: A confirmation email will also be sent to your email address, and includes the electronically-signed Copy of Record (CoR) for the report.
7	On the Submission Confirmation page, you can click on the button to view and print the Copy of Record (CoR) or the submission confirmation.	
8	Click the Done button. 	The Emissions Report is displayed.



## Request Report Amendment

If a report has been submitted but a change is later needed, you may send a request to your agency for the report to be re-opened and available for editing.

1	On the Facility Homepage screen, click the <i>Open</i> icon  of the facility to be edited.	The <i>My Reports</i> page is displayed listing reports available for editing, along with their due date, submitted date, and report status. Click on any of the headers if you wish to change the sort order of the list.
2	Click the <i>Open</i> icon for the report year to be amended.	The <i>Emission Report</i> homepage is displayed with a <i>Facility Inventory</i> section at the top and an <i>Emissions</i> section down below.
3	In the Submission Status area on the right side of the screen, click the <i>Request Amendment</i> link.	The Amendment Request page is displayed.
4	In the <i>Message:</i> box, type the reason the amendment is being requested. Ensure that sufficient detail is provided and that contact information, including phone and email, is accurate.  Click the <i>Submit</i> icon.	The Emission Report homepage is displayed. A message will appear at the top of the screen confirming that the amendment request was submitted to the agency.  After the agency approves or denies the request, an e-mail will be sent from SLEIS to the requester with a message from the agency with more information.

## Request Report Repudiation

One of the EPA requirements for online submission is a process to repudiate a report for cases such as accidental submission or if someone submitted a report using another user's credentials.

1	On the Facility Homepage screen, click the <i>Open</i> icon  of the facility to be edited.	The <i>My Reports</i> page is displayed listing reports available for editing, along with their due date, submitted date, and report status. Click on any of the headers if you wish to change the sort order of the list.
2	Click the <i>Open</i> icon for the report year to be repudiated.	The <i>Emission Report</i> homepage is displayed with a <i>Facility Inventory</i> section at the top and an <i>Emissions</i> section down below.
3	In the Submission Status area on the right side of the screen, click the <i>View Submission History</i> link.	The Submission History page is displayed.
4	Click the <i>Repudiate</i> button. 	The Repudiation Request page is displayed
5	In the <i>Message:</i> box, type the reason the repudiation is being requested. Ensure that sufficient detail is provided and that contact information, including phone and email, is accurate.  Click the <i>Submit</i> icon.	The Submission History page is displayed. A message will appear at the top of the screen confirming that the repudiation request was submitted to the agency.  After the agency approves or denies the request, an e-mail will be sent from SLEIS to the requester with a message from the agency with more information.

# Company Management

## Company Homepage (My Companies)

This is the main “dashboard” for facility users whose agency has enabled the use of the company management feature and who have been assigned a role to one or more companies. If a user does not have any company roles assigned, the [Facility Homepage](#) will be displayed instead.

The Company Homepage provides navigation to Company Facilities Homepage and to Company Reports Homepage.

In the top right corner is the company application header containing links for *Home, My Companies, My Profile, Help, and Logout*.

The main section of the Company Homepage contains a list of companies and/or facilities associated with the user account. The columns in this list are as follows:

- Identifier: the unique identifier of the company
- Name: the name of the company
- Company Roles: the user role(s) for that company

The possible company roles that may be assigned:

- **Viewer:** Can view the contents of a report, but cannot make any data modifications.

OR

- **Editor:** Can view and start/modify the contents of a report (i.e., can modify facility inventory and emissions data).


Plus zero or more of the following roles:

- **Submitter:** Can initiate the report submission process (e.g., the responsible official)
- **Administrator:** Someone with the Administrator role for a company can remove users from that company (this does not physically delete the account, just removes the association with the company) and change a user's role who is assigned to the same company as the user with the Administrator role.
- The *Actions* buttons for accessing Company Facilities Homepage or Company Reports Homepage

## Company Facilities Homepage



This page allows users with a company role to view all of the facilities currently associated with a company and edit users' roles for a company. It also allows access to view or edit each of the company's facilities' reports and individually start, export, import, validate, and submit a facility report.




### View/Edit a Facility Report

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open</i> icon  for one of the companies listed.	The Company Facilities Homepage is displayed listing all of the facilities currently associated with the company. Column headers are <i>Facility Identifier</i> , <i>Facility Name</i> , <i>Facility Roles</i> , <i>Ready for Submission</i> , and <i>Actions</i> .  The Facility Roles field will appear blank unless a user has been explicitly provided roles that differ from their role at the company level. (see note below)
2	Click the <i>Open</i> icon for the facility to be viewed/edited.	The facility's report page is displayed listing reports available for viewing/editing, along with their due date, submitted date, and report status. Click on any of the headers if you wish to change the sort order of the list.
3	On the facility's report page, click the <i>Open</i> icon for the report year to be viewed/ edited.	The <i>Emission Report</i> homepage is displayed with a <i>Facility Inventory</i> section at the top and an <i>Emissions</i> section down below.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>A user's company-level role will apply to all of the facilities associated with that company. E.g. if a user's company-level role is only "viewer," they will not be able to edit any of the facility reports. However, a user can be assigned a role of "editor" for an individual facility and will then be able to edit the reports for that facility alone.</li> </ul>		

### Edit Company User Role

This function allows users with Company Administrator role to edit users' roles or remove users' access to the facilities associated with the company. If a user has editor rights granted at the company level, they will also have editor rights for each facility associated with that company.

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open</i> icon  for the company whose users will be edited or removed.	The Company Facilities Homepage is displayed listing all of the facilities associated with the current company.
2	Under the <i>Authorized Company Users</i> section on the right side of the screen, click the <i>View Company Users</i> link.	The <i>Company Users</i> page is displayed for the current company.  A list is displayed containing company users associated with the current company, their roles, and current account status.
3	To edit a user, select the user from the list then click the <i>Edit</i> icon. 	The <i>User Profile</i> page will be opened in edit mode.

#	Steps to Perform	Expected Results
4	<p>The users can have the following company roles assigned to them:</p> <ul style="list-style-type: none"> <li>Viewer: Can view the contents of a report, but cannot make any data modifications.</li> </ul> <p><u>OR</u></p> <ul style="list-style-type: none"> <li>Editor: Can view and start/modify the contents of a report (i.e., can modify facility inventory and emissions data).</li> </ul> <p>Plus zero or more of the following roles:</p> <ul style="list-style-type: none"> <li>Submitter: Can initiate the report submission process (e.g., the responsible official)</li> <li>Administrator: Someone with the Administrator role for a company can remove users from that company (this does not physically delete the account, just removes the association with the company) and change a user's role who is assigned to the same company as the user with the Administrator role.</li> </ul>	
5	When role(s) have been updated, click the <i>Save</i> button.	<p>You will be returned to the <i>Company Users</i> page.</p> <p>The message "The user profile was successfully updated." is displayed.</p>
6	Click the application <i>last/back</i> icon  to return to the company facilities page.	The Company Facilities Homepage is displayed.
7	Click the application <i>last/back</i> icon  to return to the Company Homepage.	The Company Homepage is displayed.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>The <i>Submitter</i> role will be disabled and not available for selection if the user has not had their electronic signature credentials verified by the regulating agency.</li> <li>Deleting a user from a company, using the delete user icon , does not physically delete the user's account, but simply removes the user's association with the company's facilities.</li> <li>A user's company-level role will apply to all of the facilities associated with that company. E.g. if a user's company-level role is only "viewer," they will not be able to edit any of the facility reports. However, a user can be assigned a role of "editor" for an individual facility and will then be able to edit the reports for that facility alone.</li> </ul>		

## Company Reports Homepage

This function allows users with a company role the ability to manage and process all of the company's facilities' reports for a reporting year using batch operations for start, export, import, validation, and submission.

The page shows a list of all the reports for a company's facilities filtered by reporting year and desired action. The default action shown is *View/Print Reports* and the default year is the most recent year for which a report for any of the facilities has been created. Default sorting order of facilities is by facility identifier, headers can be clicked to change sort order.

The filter box in the upper right corner can be used to narrow down the number of facilities displayed. The *Download Templates* button is visible in the lower right corner for all lists except for *Start Reports*.


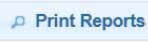




## View/Edit a Single Facility Report




When working with company reports in batch, it is also possible to access an individual facility report from the Company Reports Homepage for viewing or editing.

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon.	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the reporting period for the individual report that is to be viewed/edited, click the <i>Open</i> icon for the year to be edited.	The <i>Emission Report</i> homepage is displayed with a <i>Facility Inventory</i> section at the top and an <i>Emissions</i> section down below.
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>A user's company-level role will apply to all of the facilities associated with that company. E.g. if a user's company-level role is only "viewer," they will not be able to edit any of the facility reports. However, a user can be assigned a role of "editor" for an individual facility and will then be able to edit the reports for that facility alone.</li> </ul>		



## View/Print Reports


#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the reporting period for reports and click the <i>Select all/none</i> checkbox or individually select reports. Click the <i>Print Reports</i> button. 	The message "Batch Operations for View/Print Reports was initiated successfully." is displayed.  Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.
3	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	The <i>My Companies</i> page is displayed.  The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully generated."
4	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation request type, and batch operation status for the reports that were specified.
5	In the email, click on the link to access the results.	A new browser tab will open and display <i>Batch Operation Complete</i> at the top of the screen.  Listed below will be the output from the requested action.
6	In the browser window, click the download icon to view the requested file. 	Depending on your browser, a dialog box may pop up with the option to open the file or save it. Make a selection and view requested report(s).

## Start Reports




#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the <i>Start Reports</i> action, select the reporting period for reports, and click the <i>Select all/none</i> checkbox or individually select reports. Click the <i>Start Reports</i> button. 	<p>The message "Batch Operations for Start Reports was initiated successfully." is displayed.</p> <p>Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.</p> <p>NOTE: new reports are created by your agency and will appear here after generated. If an expected report does not appear, contact your agency's SLEIS Administrator.</p>
3	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	<p>The <i>My Companies</i> page is displayed.</p> <p>The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully started. View the attached batch summary file for more details."</p>
4	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation request type, and batch operation status for the reports that were specified.


## Validate Reports

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the <i>Validate Reports</i> action, select the reporting period for reports, and click the <i>Select all/none</i> checkbox or individually select reports. Click the <i>Validate Reports</i> button.	<p>The message "Batch Operations for Validate Reports was initiated successfully." is displayed.</p> <p>Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.</p>
3	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	<p>The <i>My Companies</i> page is displayed.</p> <p>The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully started. View the attached batch summary file for more details."</p>
4	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation





#	Steps to Perform	Expected Results
		request type, and batch operation status for the reports that were specified.  If there are no validation issues for a report, the message will read, "Completed: No QA issues found. Report marked as Ready for Submission." If there are validation issues that need to be addressed, the text under Batch Operation Status will read, "Completed: QA issues found. Refer to the batch operation results for details."
5	In the email, click on the link to access the results.	A new browser tab will open and display <i>Batch Operation Complete</i> at the top of the screen.  Listed below will be the output from the requested action.
6	In the browser window, click the download icon to view the requested file. 	Depending on your browser, a dialog box may pop up with the option to open the file or save it. Make a selection and view requested report(s).
7	Open the csv file and view message. If needed, correct business rules errors in each of the facility's reports, save and repeat the validate reports process.	
<p><b>NOTE:</b></p> <ul style="list-style-type: none"> <li>For each report that passes validation through batch validation process, its report status will automatically be updated to <i>Ready for Submission</i> and the report will appear in the list when the <i>Submit Reports</i> action is selected on the Company Reports homepage.</li> </ul>		

## Download Templates

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the reporting period for reports and click the <i>Select all/none</i> checkbox or individually select reports. Click the <i>Download Templates</i> button. 	The message "Batch Operations for Download Templates was initiated successfully." is displayed.  Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.
3	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	The <i>My Companies</i> page is displayed.  The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully started. View the attached batch summary file for more details."
4	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation request type, and batch operation status for the reports that were specified.


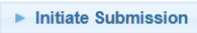


#	Steps to Perform	Expected Results
5	In the email, click on the link to access the results.	A new browser tab will open and display <i>Batch Operation Complete</i> at the top of the screen.  Listed below will be the output from the requested action.
6	In the browser window, click the download icon to view the requested file. 	Depending on your browser, a dialog box may pop up with the option to open the file or save it. Make a selection and view requested report(s).

## Import Data Files

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the <i>Import Data Files</i> action, select the reporting period for reports, and click the <i>Select all/none</i> checkbox or individually select report(s). Click the <i>Import Data</i> button. 	The <i>Select Import Files</i> page is displayed.
3	Click the <i>Browse</i> button and navigate to the location where the newly-updated <i>Processes.csv</i> file is saved and select that file. Do the same for the <i>ProcessEmissions.csv</i> file.  If there is data in the <i>ProcessSupplementalParameters.csv</i> file, do the same for that file as well.  Click the <i>Continue</i> button.  <b>NOTE:</b> Both required files need to be selected before the <i>Continue</i> button will become enabled.	The Company Reports homepage is displayed and the message "Batch Operations for Import Data was initiated successfully." is displayed.  Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.
4	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	The <i>My Companies</i> page is displayed.  The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully started. View the attached batch summary file for more details."
5	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation request type, and batch operation status for the reports that were specified.
6	In the email, click on the link to access the results.	A new browser tab will open and display <i>Batch Operation Complete</i> at the top of the screen.  Listed below will be the output from the requested action.
7	In the browser window, click the download icon to view the requested file. 	Depending on your browser, a dialog box may pop up with the option to open the file or save it. Make a selection and view requested report(s).

#	Steps to Perform	Expected Results
8	Open the csv file and view message. If needed, correct business rules errors in the import files, save, and repeat the Import Data process.	

## Submit Reports

#	Steps to Perform	Expected Results
1	On the Company Homepage screen, click the <i>Open (Company) Reports for Batch Operations</i> icon. 	The Company Reports page is displayed listing reports for a company's facilities' reports and filtered based on the most current reporting year. The <i>View/Print Reports</i> action is selected by default.
2	Select the <i>Submit Reports</i> action, select the reporting period for reports, and click the <i>Select all/none</i> checkbox or individually select reports. Click the <i>Initiate Submission</i> button. 	The message "Batch Operations for Download Templates was initiated successfully." is displayed.  Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.
3	Read the submission agreements and click in each box if the statement is true.  After clicking in each box, the <i>Continue</i> button will be enabled. Click the <i>Continue</i> button.	The Company Reports homepage is displayed and the message "Batch Operations for Submit Reports was initiated successfully." is displayed.  Under the <i>Select all/none</i> column, "(Batch in progress)" will display for the requested reports. The report(s) may be opened for viewing but cannot be opened for editing until the batch operation has completed.
4	Click the application <i>last/back</i> icon  to return to the <i>My Companies</i> page.	The <i>My Companies</i> page is displayed.  The requesting user will receive an email when the batch operation has completed. The email message will include "(x) of (x) reports were successfully started. View the attached batch summary file for more details."
5	Open email and click on the attached file to view details.	A csv file opens and displays the report year, company ID, company name, facility ID, facility name, batch operation request type, and batch operation status for the reports that were specified.
6	In the email, click on the link to access the results.	A new browser tab will open and display <i>Batch Operation Complete</i> at the top of the screen.  Listed below will be the output from the requested action.
7	In the browser window, click the download icon to view the requested file. 	Depending on your browser, a dialog box will pop up with the option to open the file or save it. Make a selection and view requested report(s).