Sustainable Groundwater Management Act Portal

Projects and Management Actions Module

User Manual

CALIFORNIA DEPARTMENT OF WATER RESOURCES
SUSTAINABLE GROUNDWATER
MANAGEMENT OFFICE

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1. User Manual Introduction and Purpose

This User Manual describes the Sustainable Groundwater Management Act (SGMA) Portal's new Projects and Management Actions Module. This User Manual is intended to provide a step-by-step overview of the new SGMA Portal Projects and Management Actions Module (PMA Module).

Per 23 CCR § 354.44, Groundwater Sustainability Plans (GSPs or Plans) are required to include a description of the projects and management actions that the Agency has determined will achieve the sustainability goal for the basin, including projects and management actions to respond to changing conditions in the basin. Additionally, each Groundwater Sustainability Agency (GSA or Agency) is required to annually describe the Agency's progress towards implementing the Plan including implementation of projects and management actions as part of the GSP Annual Reporting Requirements (23 CCR § 356.2(c)).

As part of the evaluation of whether a Plan is likely to achieve the sustainability goal of a basin, the Department of Water Resources (Department) considers whether the projects and management actions are feasible and likely to prevent undesirable results and ensure that the basin is operated within its sustainable yield (23 CCR § 355.4(b)(5)). Additionally, as part of its periodic review, the Department is required to evaluate whether the Agency is implementing its projects and management actions consistent with the Plan, or that the Agency has demonstrated that actions described in the Plan have been rendered unnecessary based on changing basin conditions or an improved understanding of basin conditions (23 CCR § 355.6(c)(2)).

The PMA Module is intended to assist Agencies in satisfying the requirements of the regulations described above by providing an organized and familiar space to track, document, and annually report on progress made toward implementing projects and management actions. while also assisting in the Departments

To view and use the tools discussed in this User Manual, SGMA Portal users (Users) must be logged into an account on the SGMA Portal. New Users can register for a SGMA Portal Account by using the link on the bottom of the SGMA Portal's home page or at the following link: https://sgma.water.ca.gov/portal/account/registration.

For any questions about the Projects and Management Actions Module, please contact GSPSubmittal@water.ca.gov.

2. Projects and Management Actions Module Process Overview

The **Project and Management Actions Module** is a centralized module to view, edit, and submit new projects and/or management actions (PMAs). The projects and management actions that a User can access are dependent on the Agencies that the User is associated with in the SGMA Portal. The goal of the **Projects and Management Actions Module** is to provide a streamlined process for Agencies to report on the progress of implementing their projects and management actions to comply with the GSP Regulations.

The **Projects and Management Actions Module** consists of the following eight sections**:**

- **Project or Management Action Information (A)**
- **Location (B)**
- **Schedule and Implementation (C)**
- **Costs (D)**
- **Benefits (E)**
- **Monitoring (F)**
- **Additional Documents (G)**
- **Implementation Updates (H)**

Sections A through E are required to be completed when initially submitting a new PMA to the Projects and Management Actions Module. The fields in these sections are based on the requirements for projects and management actions outlined in 23 § CCR 354.4(b). **Sections F and G** are optional and can be completed after the PMAs are submitted to the module.

Section H is required to be completed on an annual basis as a part of the Agencies' Annual Report submittal. This section is intended to collect data based on the GSP Regulations that state that that GSAs are required to annually submit projects and management actions' progress towards implementing the plan since the previous annual report (23 CCR § 356.2(c)).

3. Adding New Projects and Management Actions

This section outlines the process for adding new PMAs into the Projects and Management Actions Module.

To add new PMAs, the User must be associated with the Lead GSA on the SGMA Portal. For detailed instructions on granting Users permissions to PMAs, see Section 5 of this User Manual.

3.1 Completing Sections A through E

Adding a new PMA consists of providing required data for **Sections A through E** of the PMA Module. Once **Sections A through E** are completed and saved within the module, a PMA's status will be considered "Submitted" and can be viewed in the User's "**My Projects/Management Actions**" page.

Sections A through E can be completed for an individual PMA or for multiple PMAs simultaneously. Section 3.1.1 describes the process of individually adding a new PMA by filling out and submitting a form within the module. Section 3.1.2 describes the process of adding multiple PMAs simultaneously through a Batch Import template.

3.1.1 Adding an Individual Project or Management Action

1. Log in to the SGMA Portal to view the SGMA Portal's home page. Click the "**My Projects**" icon.

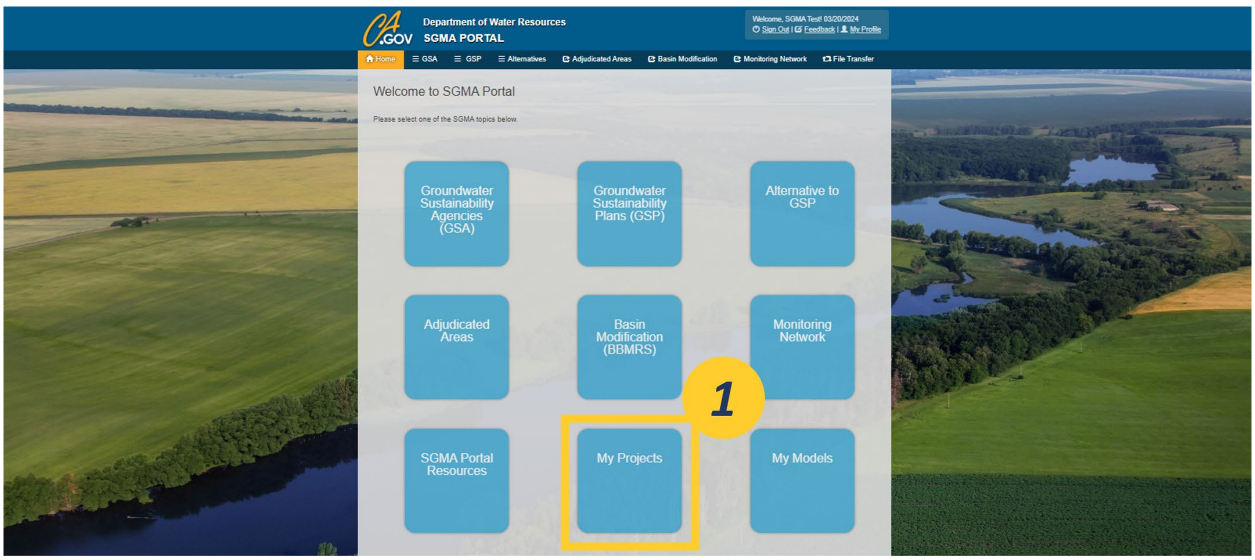


Figure 1. Screenshot of the SGMA Portal Homepage, highlighting the location of the "My Projects" icon.

2. Click the “**New PMA**” button on the top left side of the “**My Projects/Management Actions**” page. The user will be navigated to the “**New Project/Management Action**” page.

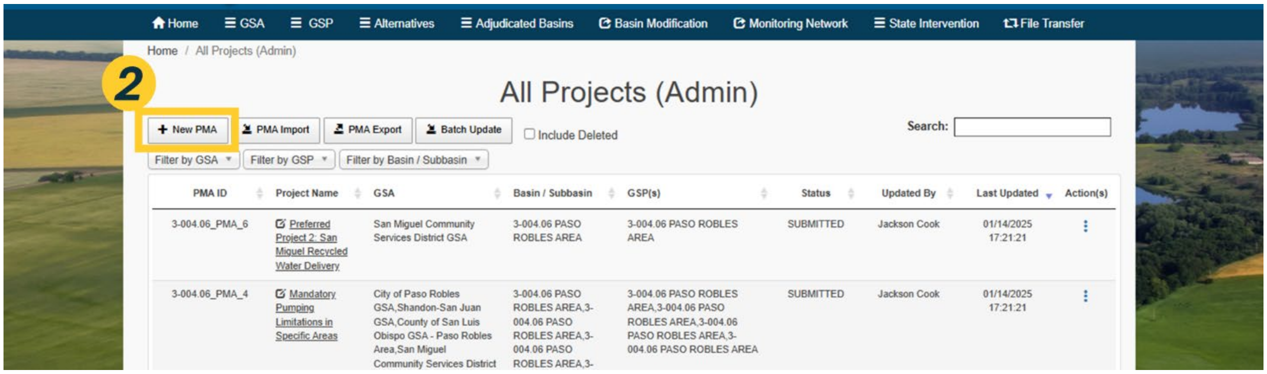


Figure 2. A screenshot highlighting the “New PMA” button.

3. Complete the required fields on the “**New Project/Management Action**” page, which includes **Sections A through E.**

4. Sections can be collapsed and expanded using the arrow symbol (“>”) on the right side of each section’s header.

5. Text entry fields can be expanded vertically by clicking and dragging the right corner of any text entry field box.

6. Once all required fields are completed, click “**Submit to DWR**” at the bottom of the page to submit the project or management action. If needed, the user can click "**Save as Draft**" to save progress on the project or management action.

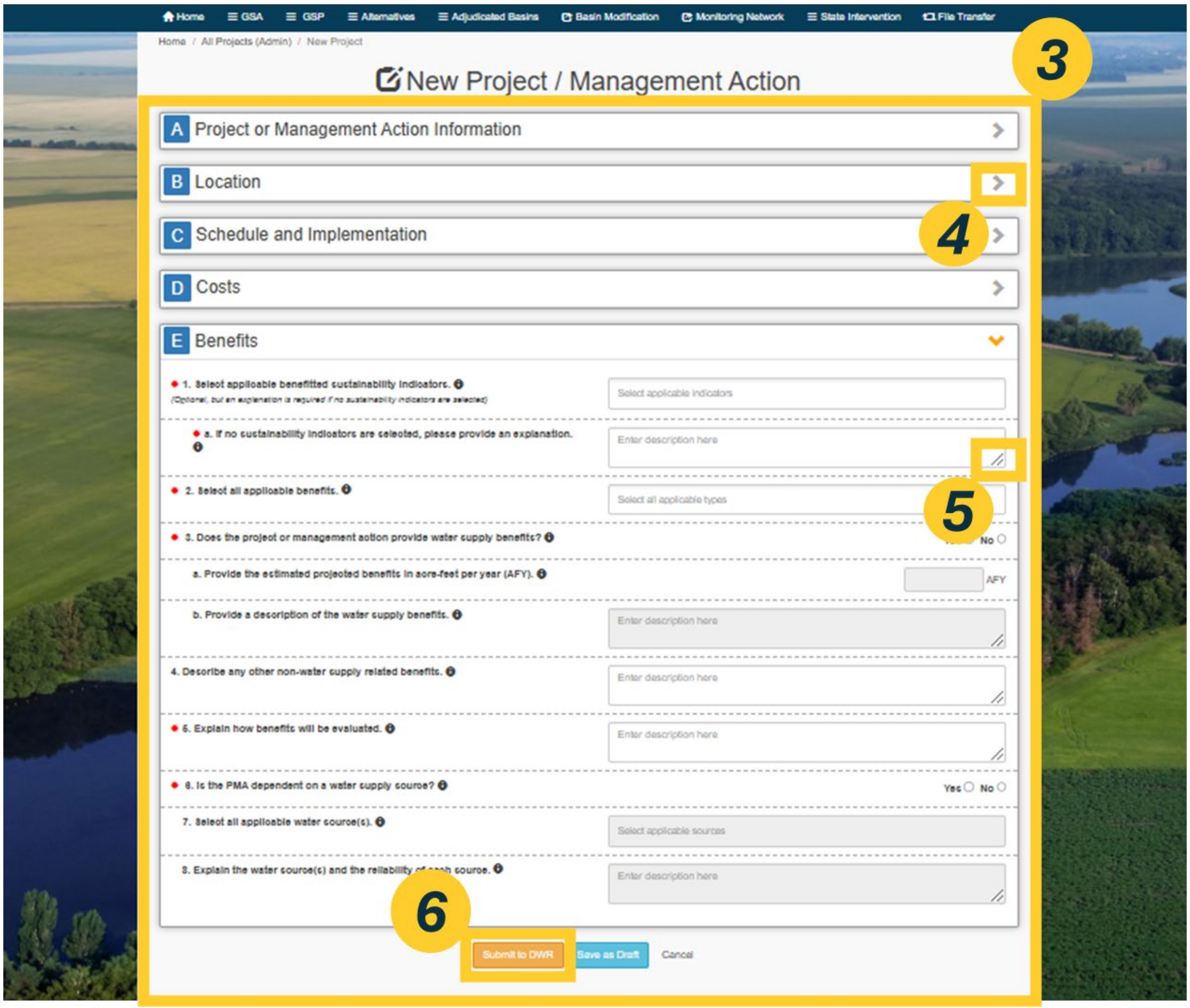


Figure 3. A screenshot of the "New Project/Management Action" page. Sections A through E are highlighted for Step 3. The arrow symbol to expand and collapse sections and the text entry field corner are highlighted for Step 4. The corner of a text entry field is highlighted for Step 5. The "Submit to DWR" button is highlighted for Step 6.

7. After saving the new PMA, the page will be redirected to the "**Edit Project/Management Action**" page. This indicates that the PMA has been successfully submitted. The information entered into **Sections A through E** for the PMA can be viewed by expanding any of the Sections.

8. At this time, **Sections F, G, and H** will become available for this PMA. The User can choose to provide this information immediately or can choose to provide this information at a later time. For instructions about how to provide information to **Sections F, G, and H** at a later time, see Section 4.2 and Section 4.3 of this User Manual.

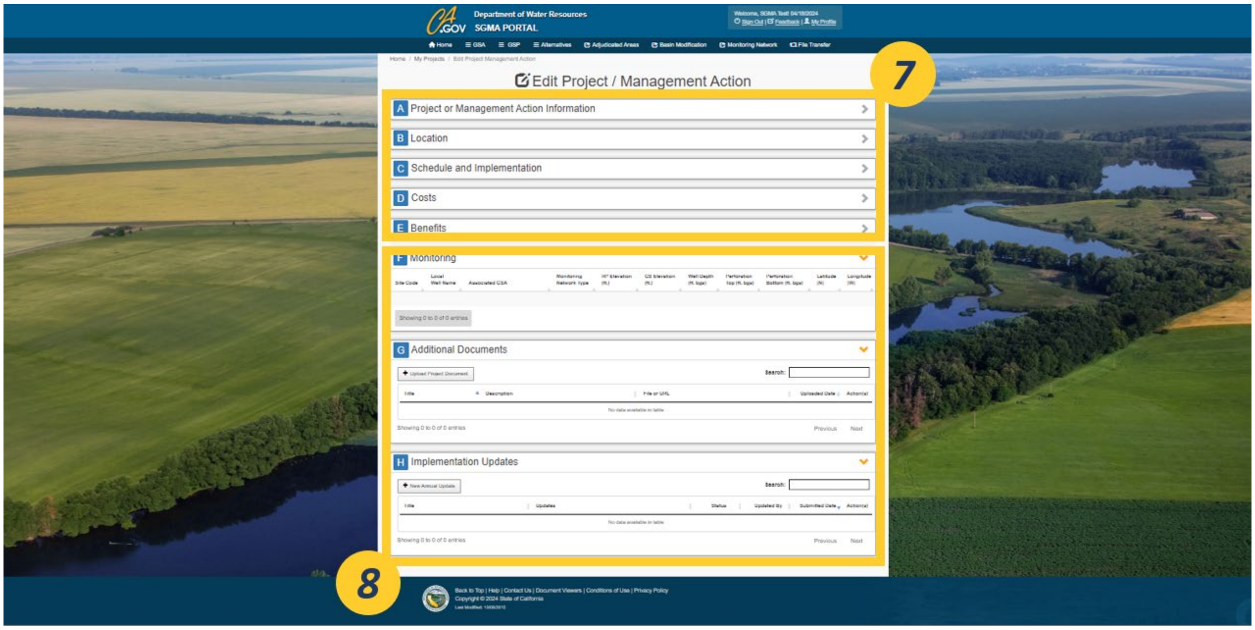


Figure 4. A screenshot showing the "Edit Project/Management Action" page. Sections A through E, which can be expanded to show the submitted information, is highlighted for Step 7. Sections F through H are highlighted for Step 8.

9. To view the submitted project or management action, go to the "**My Projects/Management Actions**" page.

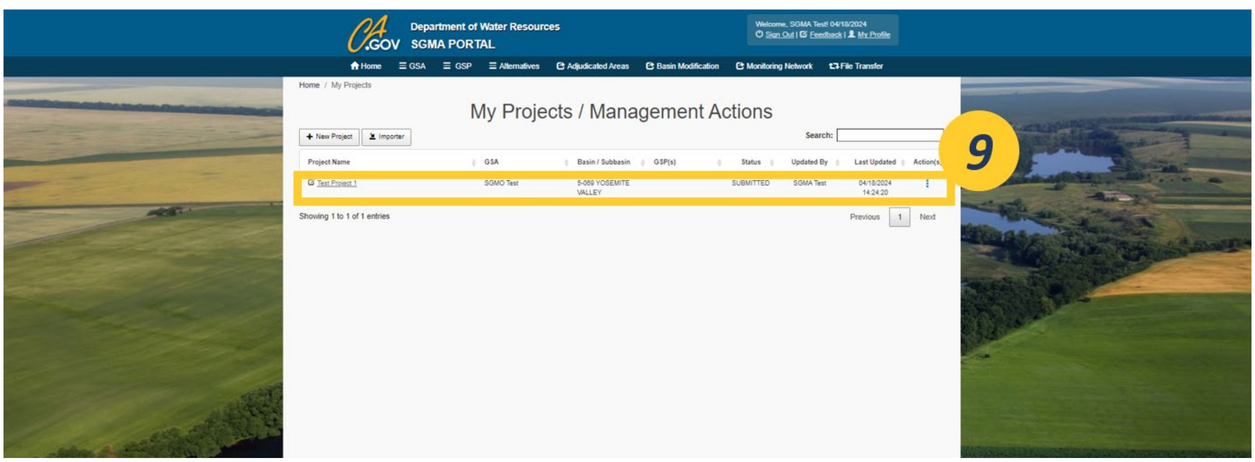


Figure 5. A screenshot of the "My Projects/Management Actions" page highlighting the newly submitted project.

3.1.2 Batch Import Method – Adding New PMAs

1. From the SGMA Portal's home page, click the "**My Projects**" icon to navigate to the "**My Projects/Management Actions**" page.

Figure 6. Screenshot of SGMA Portal Homepage, highlighting the location of the "My Projects" icon.

2. Click the "**PMA Import**" button.

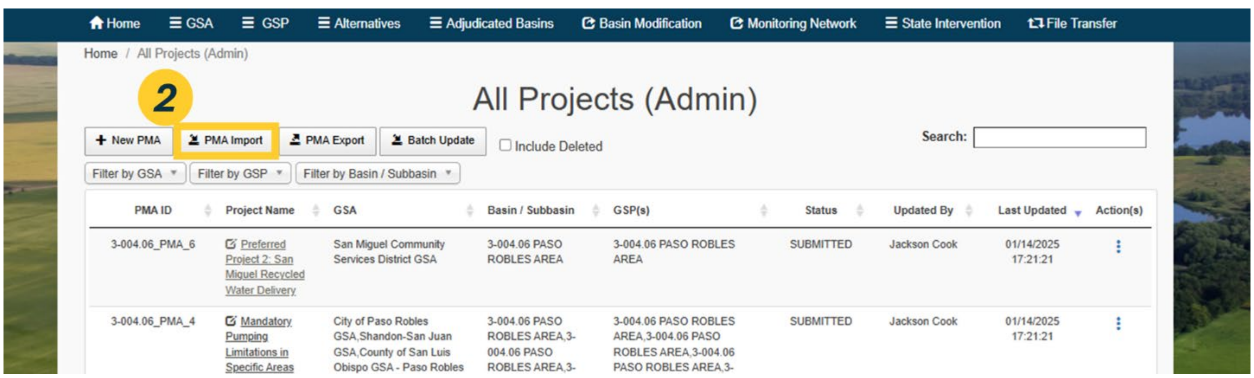


Figure 7. Screenshot of the My Projects/Management Actions page, highlighting the location of the "PMA Import" button.

3. Click the "**Download Excel Template**" button to download the batch import spreadsheet template (.xlsm format).

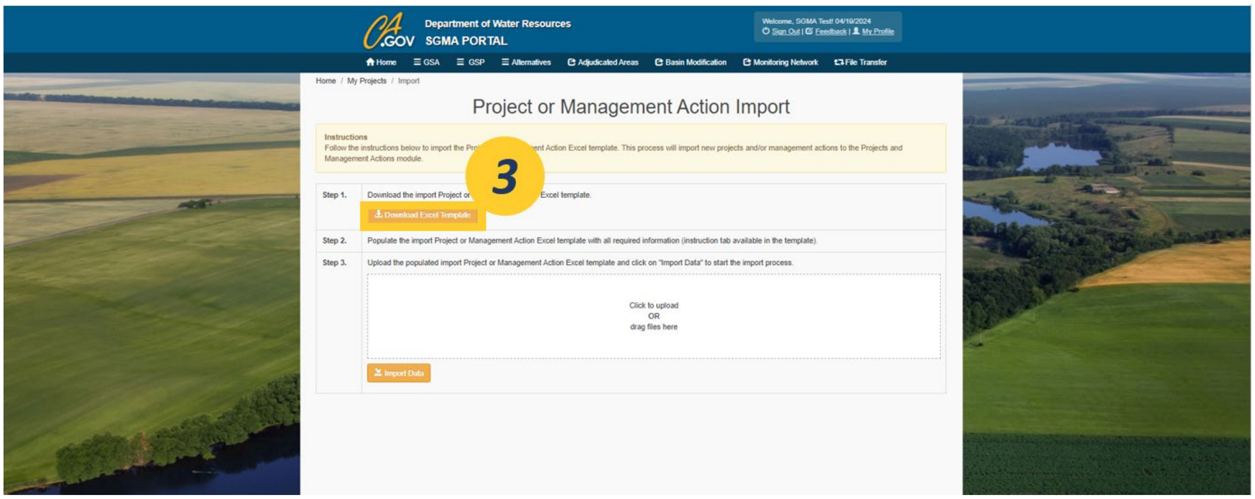


Figure 8. Screenshot of the "Project or Management Action Import" page, highlighting the location of the "Download Excel Template" button.

4. Open the Batch Import spreadsheet template. Macros must be enabled for certain fields of the spreadsheet to work correctly. These macros are used for certain fields in the module where multiple selections are allowed (i.e., Lead GSA(s), Project Type, Potential Funding Sources). For instructions about enabling macros, please see Section 3.1.3 of this User Manual.

5. Fill out the Batch Import template starting at cell **A2** on the "**Batch Import Spreadsheet**" tab so that each row correlates to a respective project. Each column correlates to the fields in **Sections A through E.**

Although some fields are locked for editing, you can copy and paste fields within the spreadsheet; however, you may get an error if you try to paste an entire row. If this happens, select only the cell(s) that you want to copy and paste.

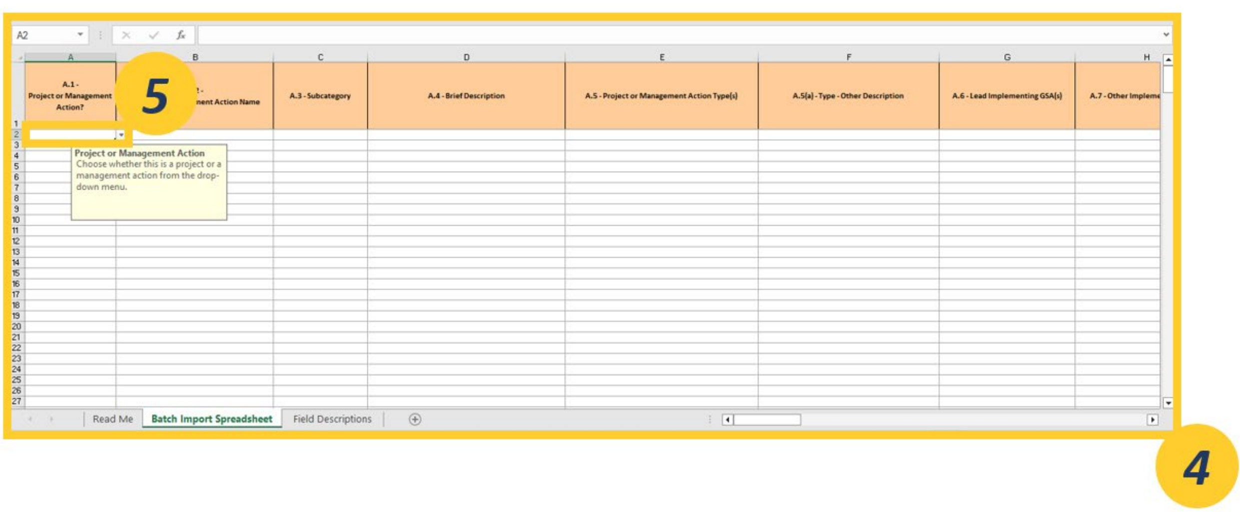


Figure 9. Screenshot of the Batch Import Spreadsheet. The spreadsheet is highlighted for Step 4. Cell A2 is highlighted for Step 5.

6. When clicking into a cell, a popup box with a brief description of the respective field will appear.

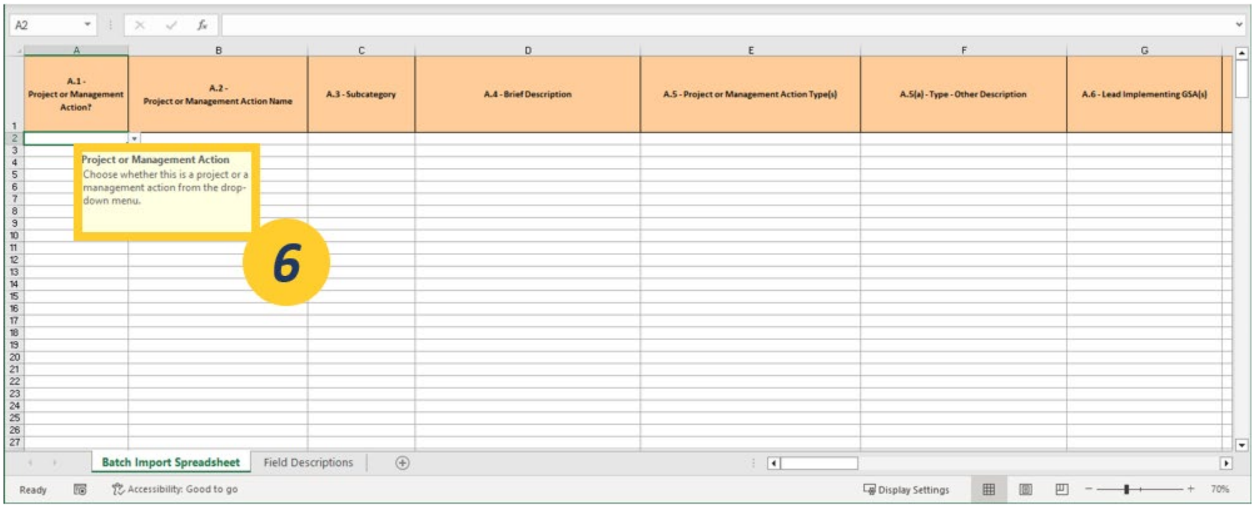


Figure 10. Screenshot of the Batch Import Template. A popup box with a brief description of the respective field is highlighted.

7. More detailed information about each field is on the "**Field Descriptions**" tab. This tab provides a description of each field and indicates whether the field is required. The user will also see a "**Read Me**" tab in the spreadsheet, this tab provides general instructions and descriptions on how to use the spreadsheet.

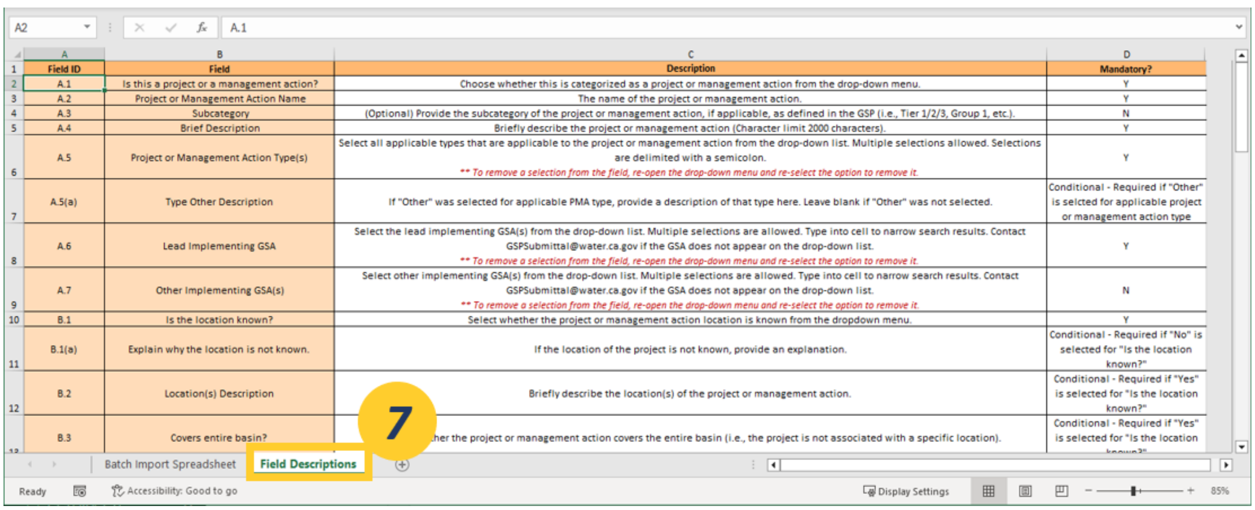


Figure 11. Screenshot of the Batch Import template. The "Field Descriptions" tab is highlighted.

8. Selections in certain fields can result in corresponding fields graying out in the same row. Do not enter text into these grayed out fields.

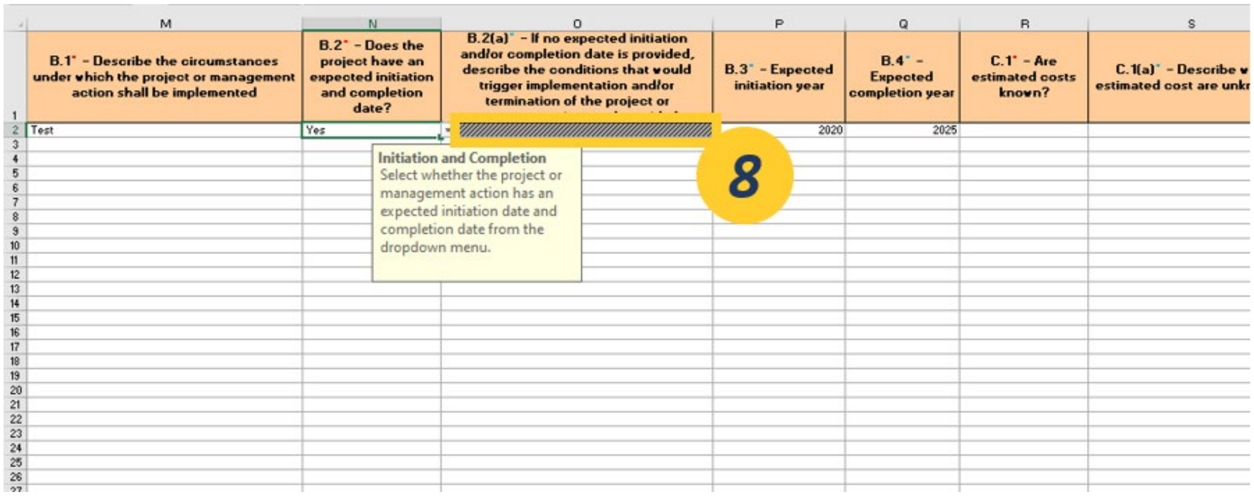


Figure 12. Screenshot of the Projects and Management Action Batch Import template spreadsheet. A grayed-out field is highlighted indicating that the user should not fill out this field.

9. After filling out the Batch Import spreadsheet, **close the spreadsheet.** If the spreadsheet is not closed, the spreadsheet will not upload correctly. Return to the "**Project or Management Action Import**" page. Upload your completed Batch Import spreadsheet by clicking to upload or dragging your file into the indicated space.

10. Click the "**Import Data**" button.

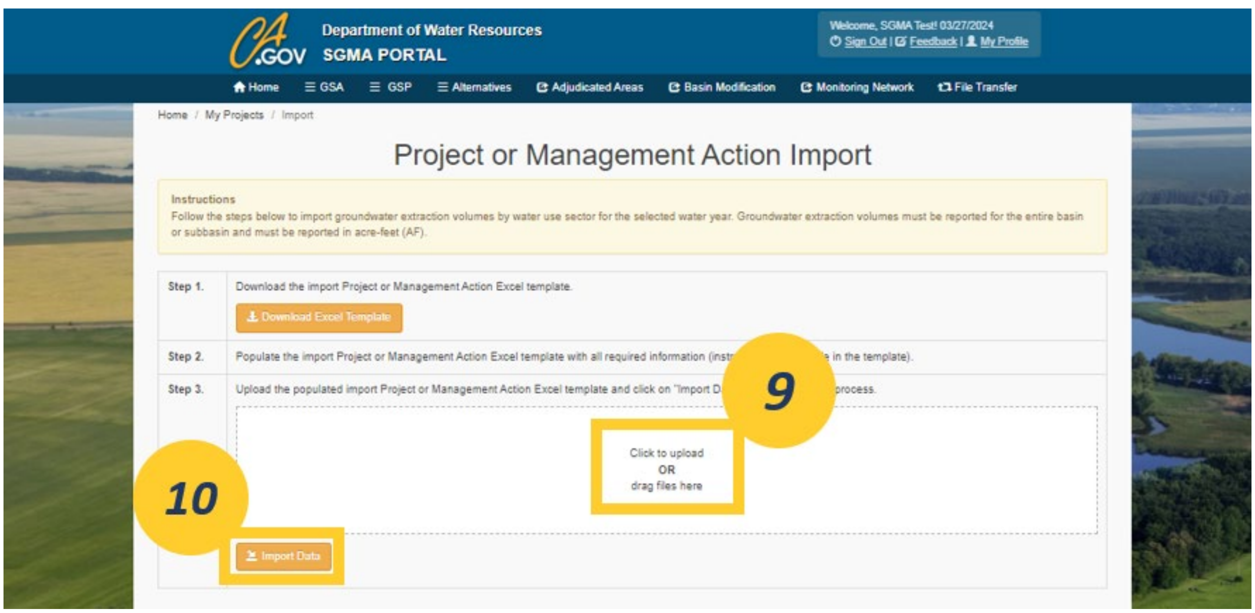


Figure 13. Screenshot of the Projects and Management Action Import page. The area to click or drag the spreadsheet is highlighted as Step 9. The "Import Data" button is highlighted as Step 10.

11. If there are errors in the Batch Import template, an “**Error(s)**” popup box will appear which will indicate the corresponding row that the error is located in and the field that contains the error. No PMAs are imported if there are errors. If the “**Error(s)**” popup appears, fix the indicated errors on the Batch Import template and re-upload following the directions in the previous step.

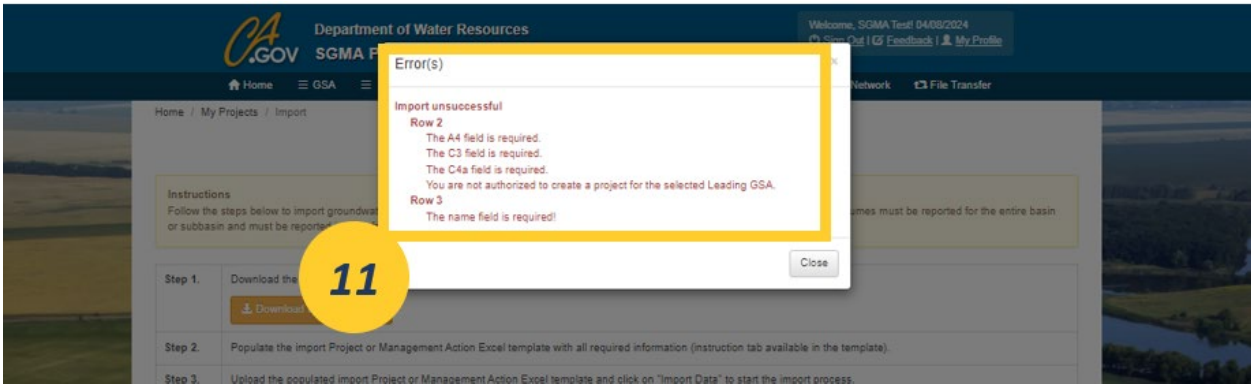


Figure 14. Screenshot of “Error(s)” popup box. The text in the popup box is highlighted which provides the corresponding row of the error and the field that contains the error.

12. If there are no errors, a “**Success**” popup box will appear indicating that the upload was successful. The “**Success**” popup box indicates that the PMAs were submitted to the **Projects and Management Actions Module.**

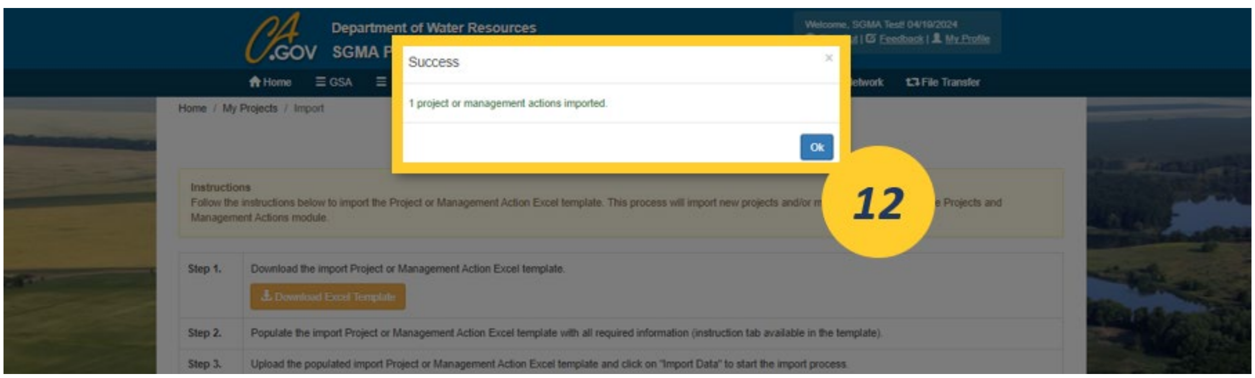


Figure 15. Screenshot of the “Success” popup box, indicating that the PMAs were uploaded successfully.

13. After successfully uploading the Batch Import template, the PMAs will appear in the "**My Projects/Management Actions**" page.

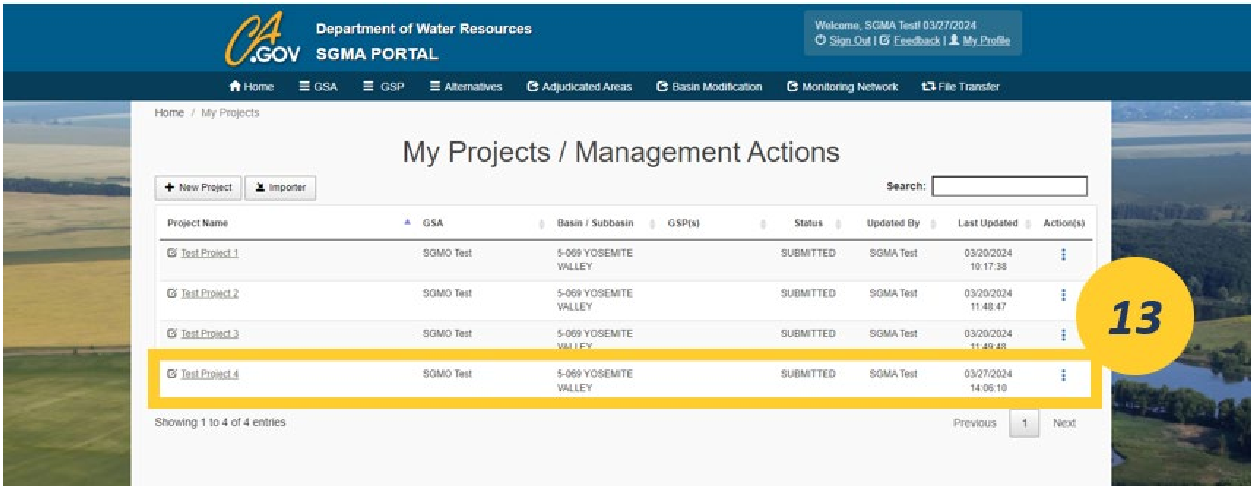


Figure 16. Screenshot of the "My Projects/Management Actions" page highlighting the newly uploaded PMA that was imported via the Batch Import template.

3.1.3 How to Enable VBA Macros in the Batch Import Template

The following two methods can be used to enable macros within the Batch Import template. Enabling macros should be done at the User's discretion and should follow the User's organizational policies.

Enabling macros may be blocked by some organizations' security settings. If the following methods are not available due to organizational security settings, the User should contact their organization's administrator. Additionally, the User can contact GSPSubmittal@water.ca.gov for further assistance.

3.1.3.1 Enabling VBA Macros within the Workbook Only

If the User opens the file and finds that the macros have been blocked within the workbook, the User can change the settings to run the macros for the file only.

1. The User may see a "Security Warning" banner at the top of the Excel file. If this banner appears, click "**Enable Content**". If this banner does not appear, go to **Step 3**.

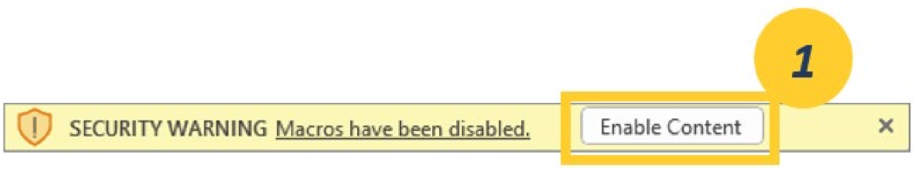


Figure 17. Screenshot of the "Security Warning" banner, highlighting the "Enable Content" option.

2. A "**Security Warning**" popup box will appear. Click "**Yes**" to make the file a Trusted Document. Once the User selects "**Yes**", the macros within the file will be enabled.

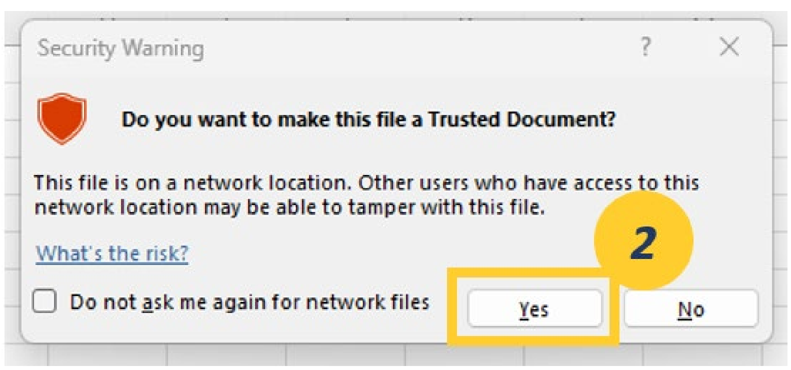


Figure 18. Screenshot of the "Security Warning" popup box, highlighting the "Yes" option.

3. The user may see a "**Security Risk**" banner instead of the "**Security Warning**" banner shown in **Step 1.** If the "**Security Risk**" banner appears, move on to the next step. If the "**Security Risk**" banner does not appear, go to Section 3.1.3.2.

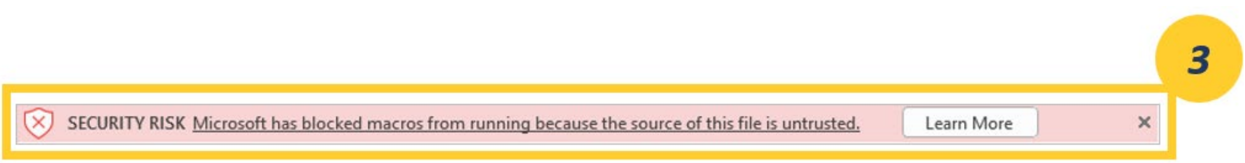


Figure 19. Screenshot of the "Security Risk" banner.

4. **Close the file.** In File Explorer, navigate to the folder where the file is saved.

5. Right click the file and click "**Properties**".

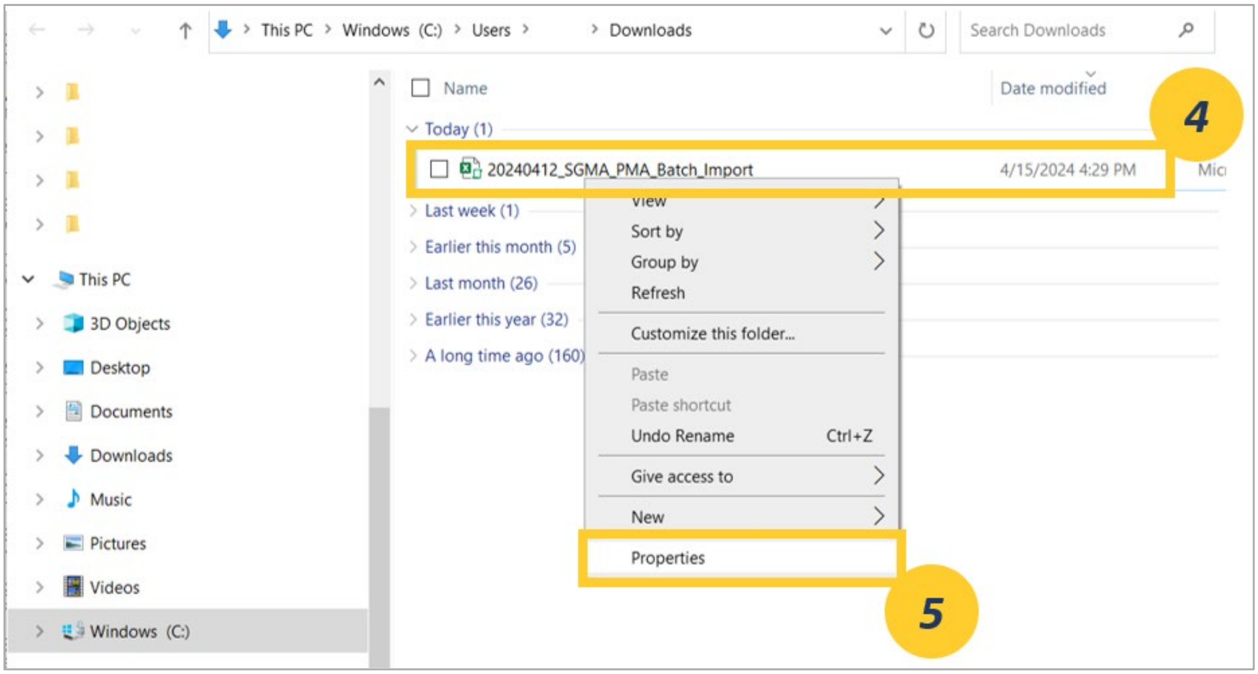


Figure 20. Screenshot of File Explorer, with the saved file highlighted as Step 4 and the "Properties" option highlighted for Step 5.

6. The **Properties** window will open. At the bottom of the "General" tab in the "Security" section, check the "**Unblock**" checkbox. When the file is reopened, the macros will be enabled.

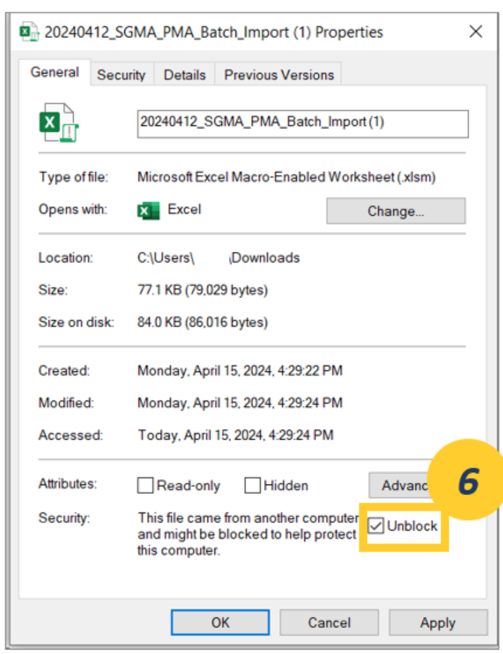


Figure 21. Screenshot of the "Properties" window, highlighting the location of the "Unblock" checkbox.

3.1.3.2 Changing Excel Settings to Enable VBA Macros

The User can change their settings in Excel to allow macros. This method will only change the settings of Excel and will not change other Microsoft 365 Applications.

1. Open Excel. Select the "**File**" tab and go to "**Options**".

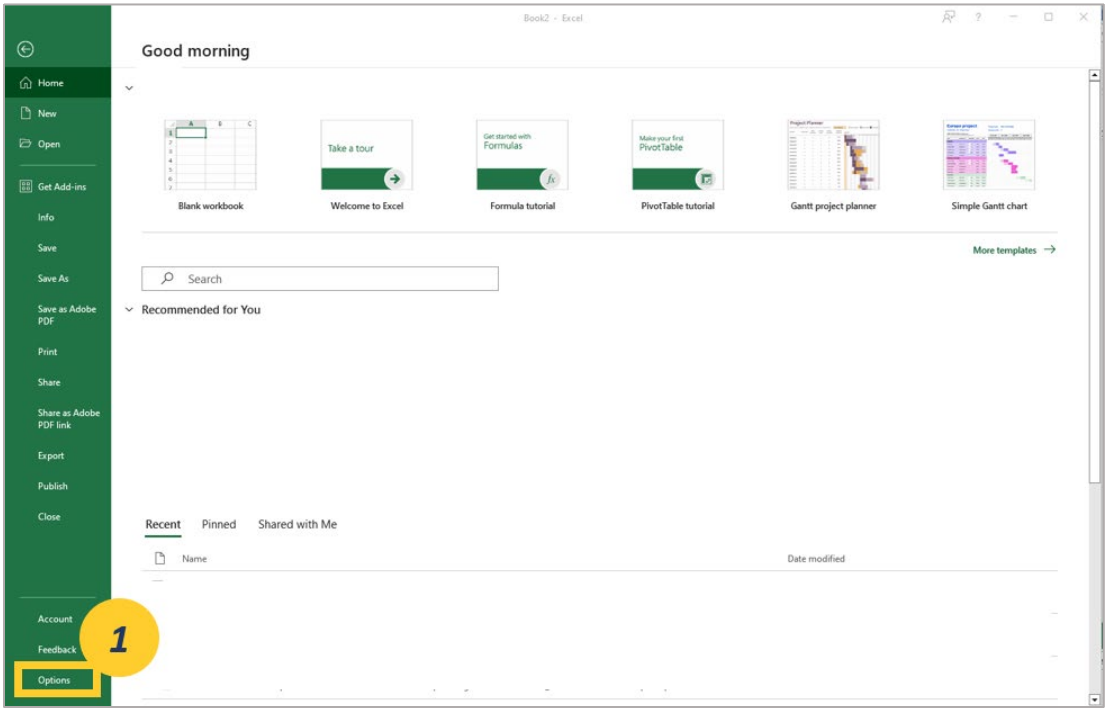


Figure 22. Screenshot of Excel, highlighting the "Options" location.

2. Select the "**Trust Center**" tab.

3. Select "**Trust Center Settings**".

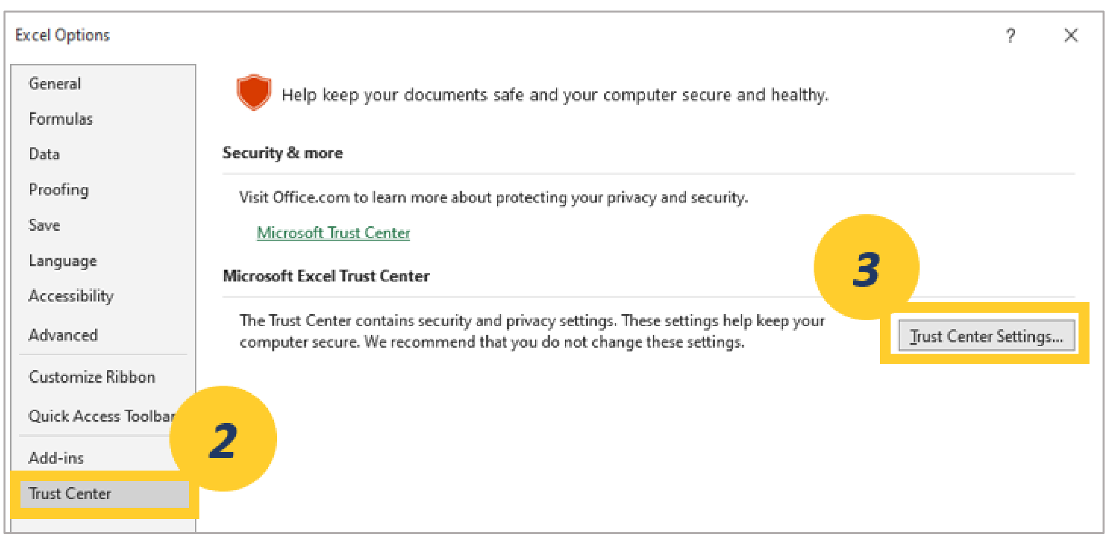


Figure 23. Screenshot of the Excel Options window, highlighting the "Trust Center" tab for Step 2 and "Trust Center Settings" for Step 3.

3. Select the “Macro Settings” tab.

4. Select “Disable VBA macros with notification”. This will allow the User to designate the files to enable macros on a case-by-case basis.

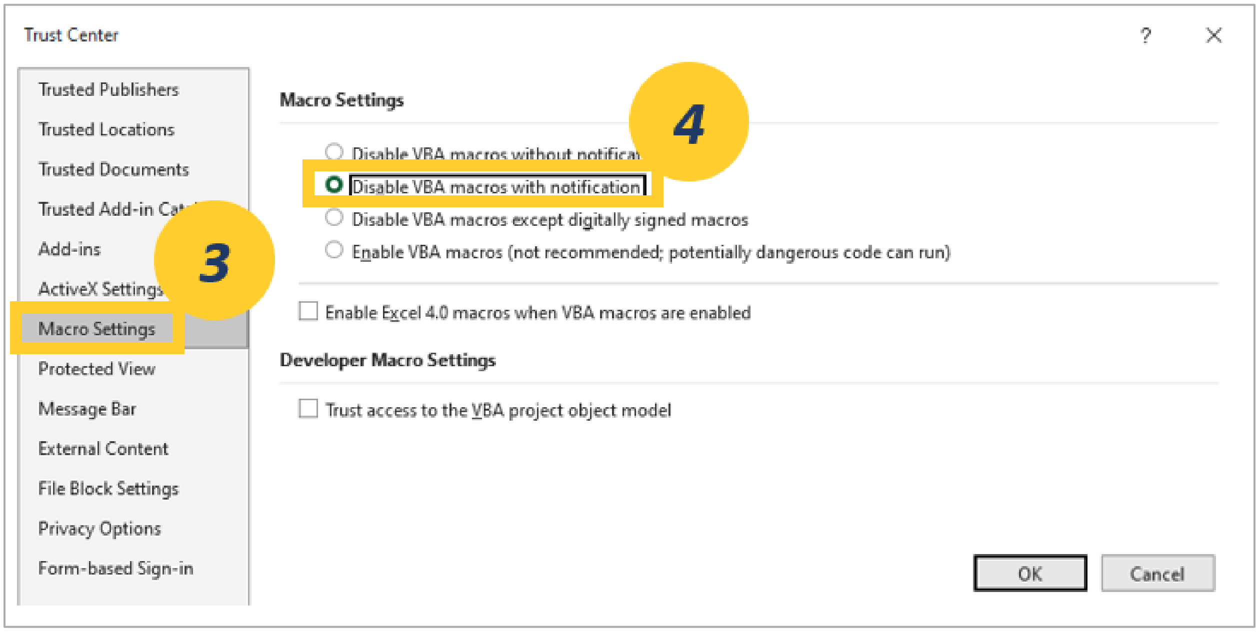


Figure 24. Screenshot of the Trust Center options, with the location of the “Macro Settings” tab highlighted as Step 3 and the “Disable VBA macros with notification” highlighted as Step 4.

5. When the User reopens the file, the “**Security Warning**” box will appear at the top of the screen. Click “**Enable Content**” and follow the instructions in Section 3.1.3.1 to enable the macros within the Batch Import template file.

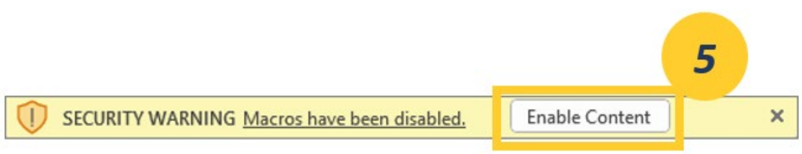


Figure 25. Screenshot of the “Security Warning” box. The “Enable Content” box is highlighted as Step 5.

4. Updating a Submitted Project or Management Action

This section describes the process of updating data associated with submitted PMAs. The general process of editing data associated with a submitted PMA is described in Section 4.1.

The option to submit data to **Sections F (Monitoring)** and **G (Additional Documents)** becomes available only after the PMA is submitted. **Sections F and G** cannot be added by the batch import template and must be added by editing an existing PMA. The process of submitting data to **Sections F and G** is described in Section 4.2.

A description of the PMA's implementation progress is required to be submitted on an annual basis in **Section H (Implementation Updates).** At this time, implementation updates in Section H can be submitted within each PMA's respective page. Batch upload functionality for **Section H** is not available at this time; however, this feature is planned to be added as part of the SGMA Portal's Annual Reporting Module in a future update. The process for adding implementation updates to **Section H** is described in Section 4.3.

4.1 Editing an Existing Project or Management Action

1. Navigate to the "**My Projects/Management Actions**" page. The PMAs that are associated with the User's account will appear in the table. Navigate to the desired project or management action and click the hyperlink of its name in the first column.

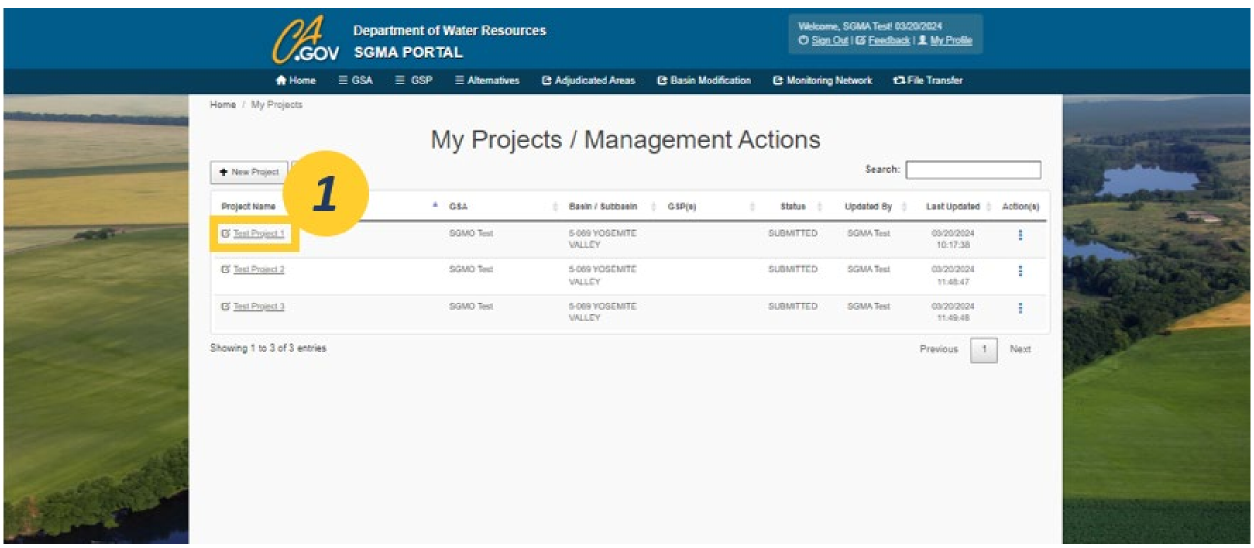


Figure 26. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted as Step 1.

2. The “**Edit Project/Management Action**” page will load.

3. Use the “>” symbol on the right side of any of the section headers to collapse or expand a section.

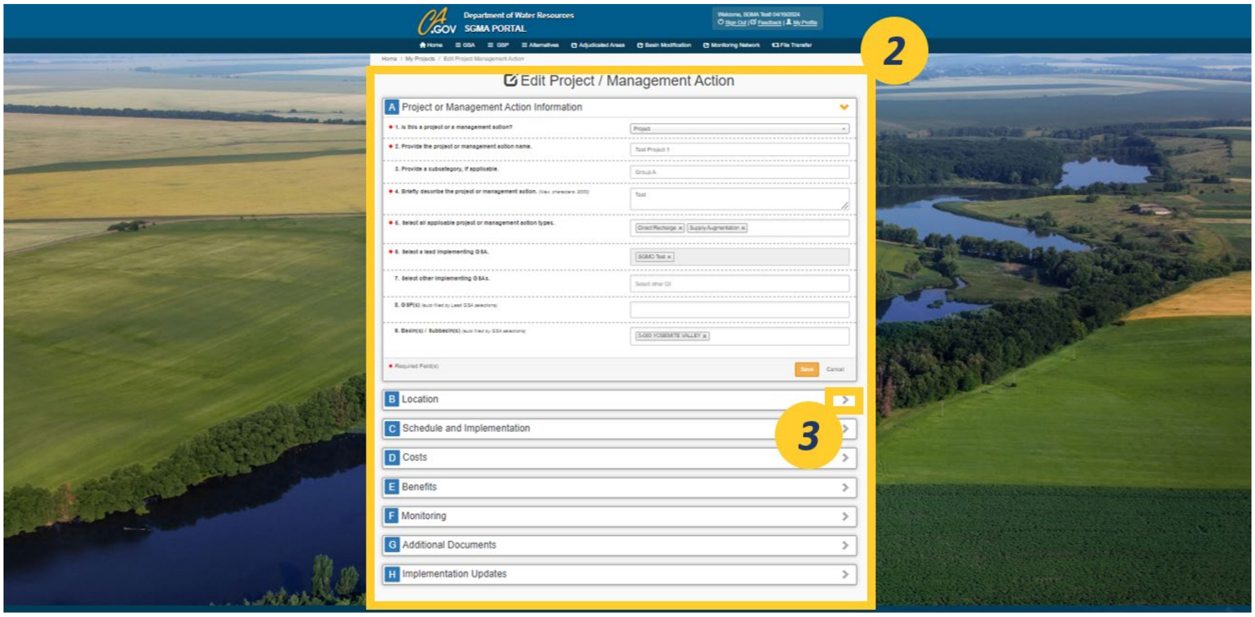


Figure 27. A screenshot of the “Edit Projects/Management Action” page. The “Edit Projects/Management Action” page is highlighted as Step 3. The “>” button, which can collapse or expand a section, is highlighted as Step 3.

4. Changes to **Sections A through E** must be saved by using the “**Update**” button located at the bottom of **Section E.**

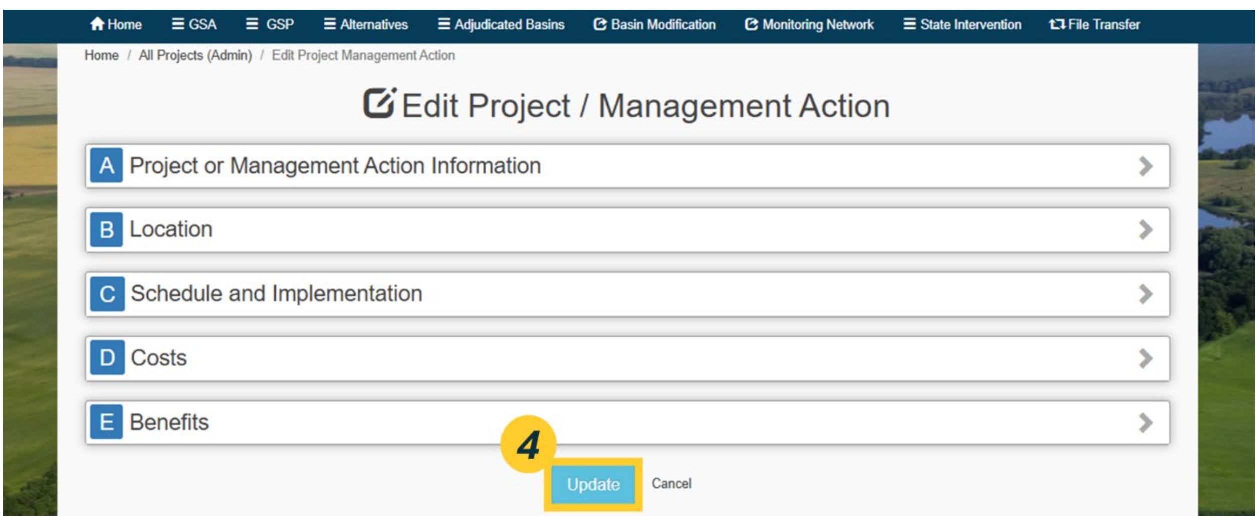


Figure 28. A screenshot of the “Edit Project/Management Actions” page. The “Update” button at the bottom of Section E is highlighted.

5. **Sections F through H** do not require the User to use a save button to save changes. For further information on editing **Sections F or G**, See Section 4.2. For further information on editing **Section H**, See Section 4.3.

4.2 Completing Sections F and G

The option to submit data to **Sections F (Monitoring)** and **G (Additional Documents)** becomes available only after PMAs are submitted to the module. **Sections F and G** cannot be added by the batch import template and must be added by editing an existing PMA. Please note that while **Section F** is currently viewable on the PMA Module, it is currently under construction and the features are not fully available; data will not be able to be submitted or changed in **Section F** until future updates of the PMA Module.

1. Navigate to the desired PMA's page by clicking the PMA's hyperlink on the "**My Projects/Management Actions**" page.

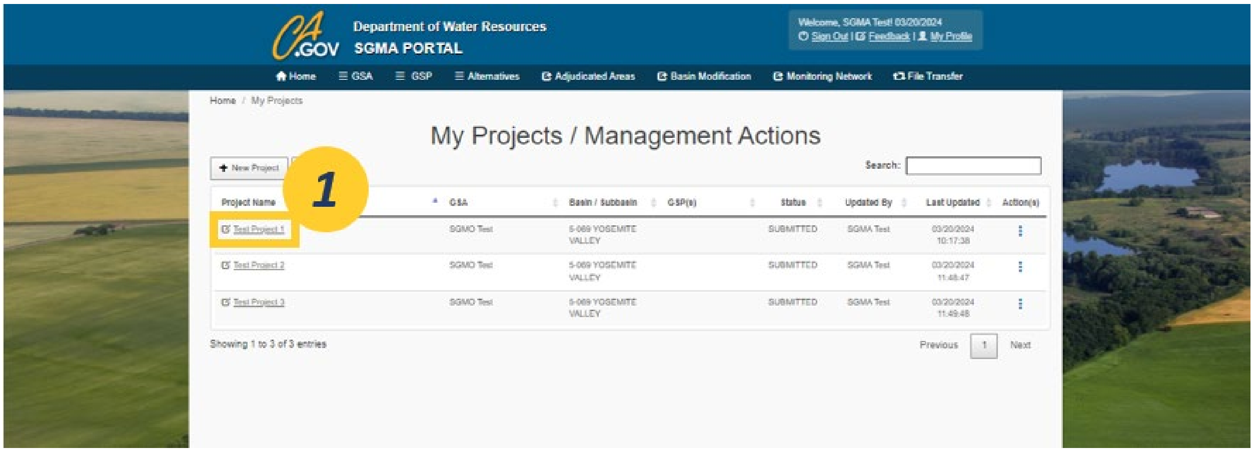


Figure 29. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted as Step 1.

2. On the PMA's page, navigate to **Section F**. The table will display the wells in Monitoring Network Module that are associated with the Lead GSA. Currently, these wells are view-only and no data can be submitted or changed. This feature will be built out and updated in future updates of the PMA Module.

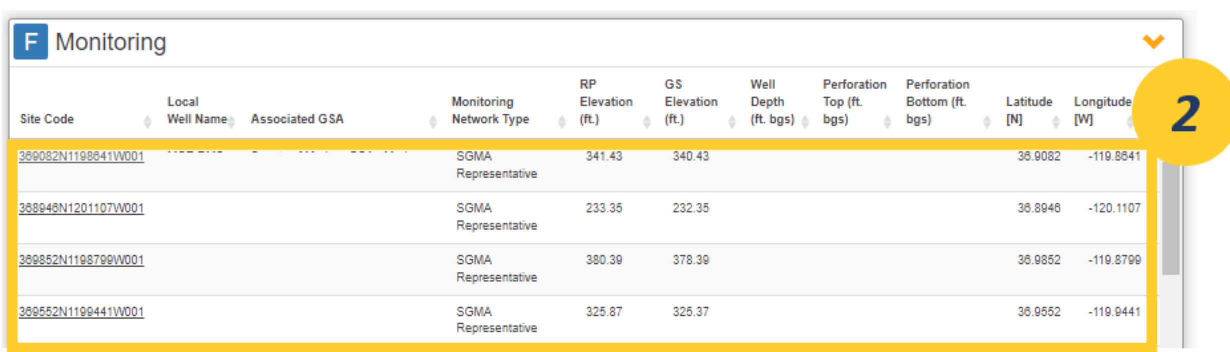


Figure 30. A screenshot of Section F showing the Lead Agency's wells.

3. On the PMA's page, navigate to **Section G.** Click the "**Upload Project Document**" button. The **Project Document Form** popup box will appear.

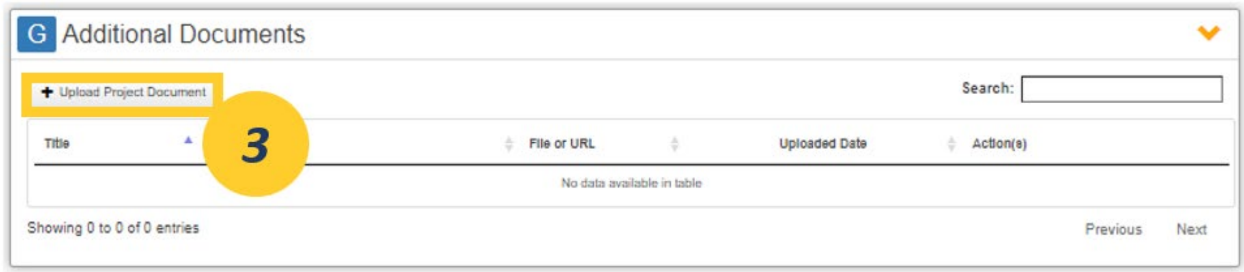


Figure 31. A screenshot of Section G. The "Upload Project Document" box is highlighted.

4. Fill out the required information on the **Project Document Form** popup box.

5. When completed, click "**Save**".

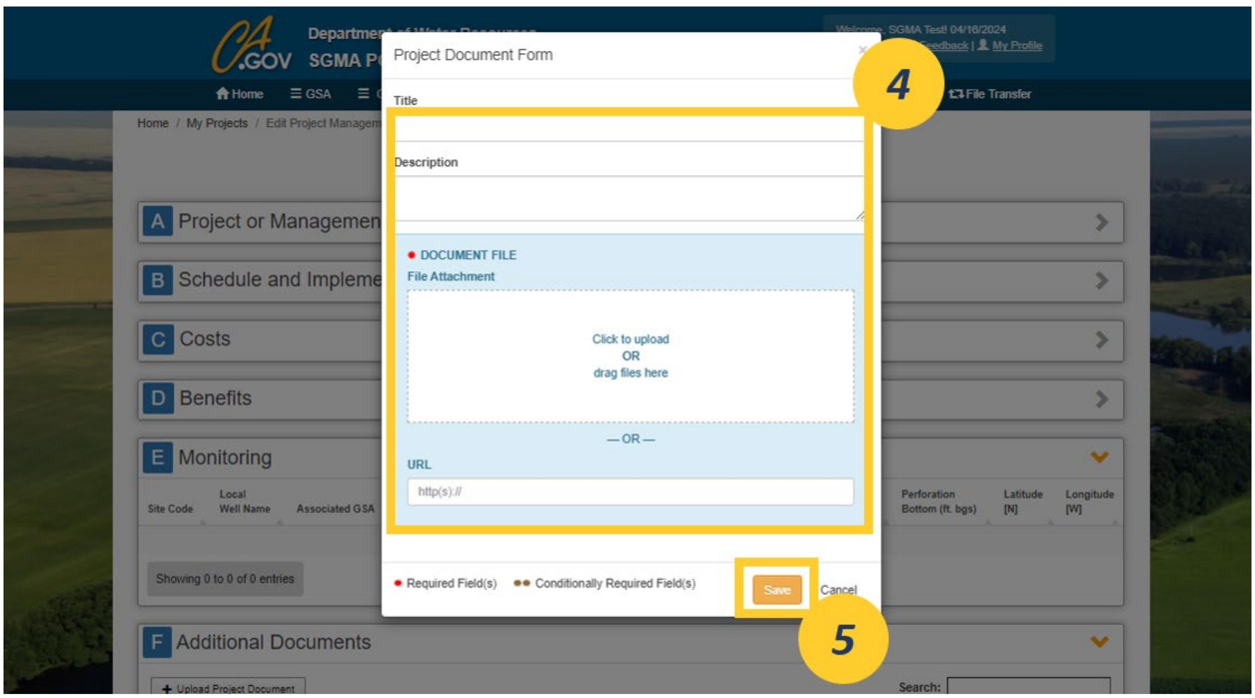


Figure 32. A screenshot of the Project Document Form. The form's fields are highlighted as Step 5. The "Save" button is highlighted as Step 6.

6. The uploaded document will now appear in **Section G.**

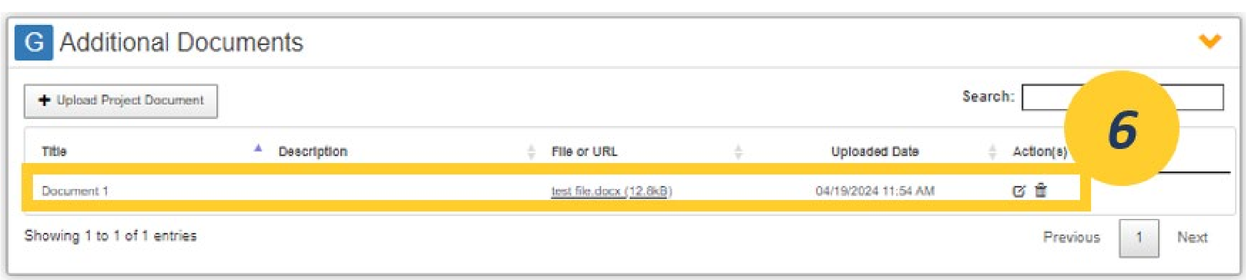


Figure 33. A screenshot of Section G. The newly uploaded document in the table is highlighted.

5. Providing PMA Implementation Updates – Completing Section H

This section outlines the process of adding new **PMA Implementation Updates** to the PMA Module.

The new Implementation Updates feature provides agencies with the ability to report and track progress on the implementation of their PMAs over time. Implementation Updates are submitted to the agencies' existing PMAs on the PMA Module. The updates consist of providing the status of the PMA during each water year (WY). Depending on the status of the PMA, other information may be required to be provided, such as a description of the PMA's progress, benefits accrued, and new funding obtained.

Per *23 CCR § 356.2(c)*, Annual Reports must include a description of progress towards implementing the Plan, including the implementation of projects or management actions since the previous annual report. **At least one Implementation Update per water year will be required for each PMA starting in the WY 2025 Annual Report.** Implementation Updates may be submitted at any time, but at least one update for per water year is required for each PMA by the time that Annual Report submissions are due (April 1st of each year).

The SGMA Portal provides the following three methods for GSAs to submit implementation updates for their PMAs, which are explained in subsequent sections of this User Manual:

1. Submitting an Individual Implementation Update to a PMA in Section H (See Section 5.1.1)
2. Batch importing Implementation Updates to multiple PMAs simultaneously (See Section 5.1.2)
3. Submitting Implementation Updates via the Annual Reporting Module (See Section 5.2)

Regardless of the method that is used to submit the Implementation Updates, the Implementation Updates for each PMA are stored in **Section H** on the respective PMA page.

5.1 Providing Implementation Updates via the PMA Module

5.1.1 Adding an Individual Implementation Update

1. Navigate to the PMA's page that you want to add an Implementation Update to by clicking the PMA's hyperlink on the "**My Projects/Management Actions**" page.

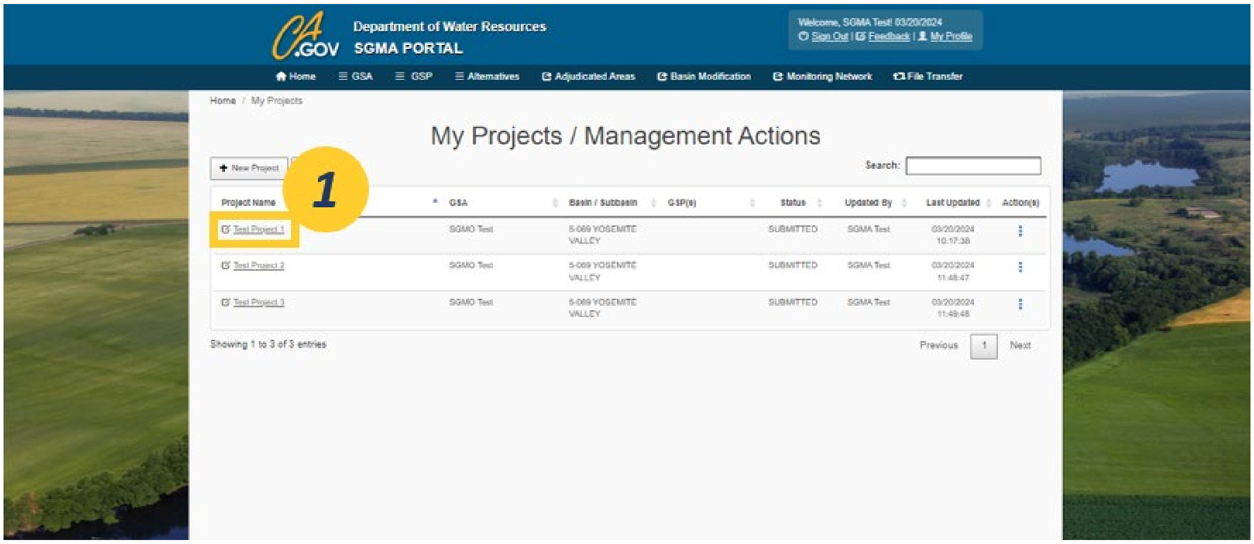


Figure 34. A screenshot of the "My Projects/Management Actions" page. The hyperlink under the first column is highlighted.

2. On the PMA's page, navigate to **Section H**. Click the "**New Implementation Update**" button. The **Implementation Updates form** will appear.

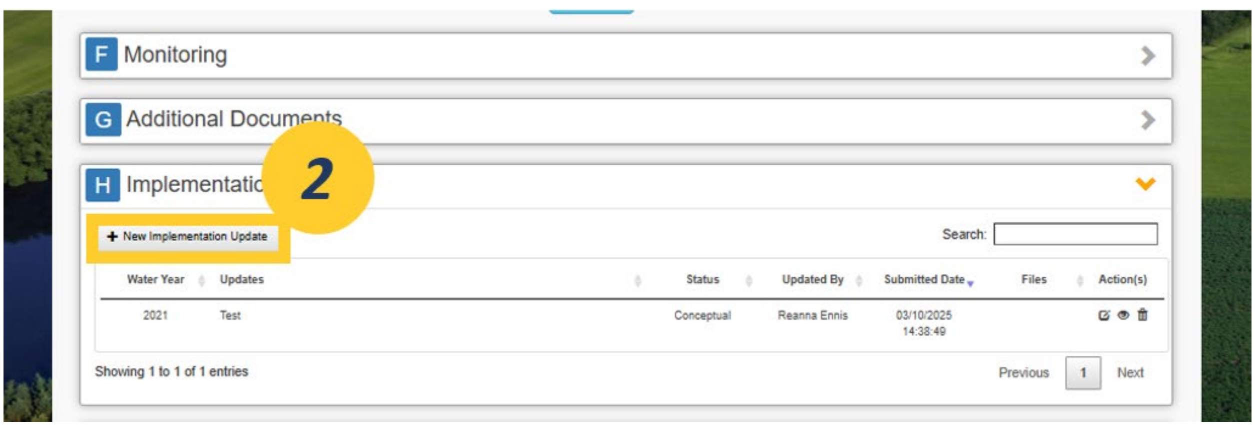


Figure 35. A screenshot of Section H. The "New Implementation Update" button is highlighted.

3. Fill out the required information on the **Implementation Updates Form**. The required fields will change depending on the selected option in the "**Status**" field. The red asterisk ("*") indicates whether a field is required.

4. If "**Conceptual**", "**Planning**", "**Construction**", "**Ongoing**", "**Completed – Accruing Benefits**", or "**Completed – Benefits Fully Realized**" are selected for the "**Status**" field, then there will be several required follow-up questions (Questions 4 through 7).

Please note that if "**Completed – Benefits Fully Realized**" is selected, then subsequent future Implementation Updates will **not** be required to be provided for the PMA. Select this option if the PMA has been completed and the GSA expects to provide no future updates on this PMA.

Conversely, if "**Completed – Accruing Benefits**" is selected, then future Implementation Updates will still be required to be provided for the PMA. Select this option if the PMA has been completed, but the GSA can continue to report ongoing benefits from the PMA in future updates.

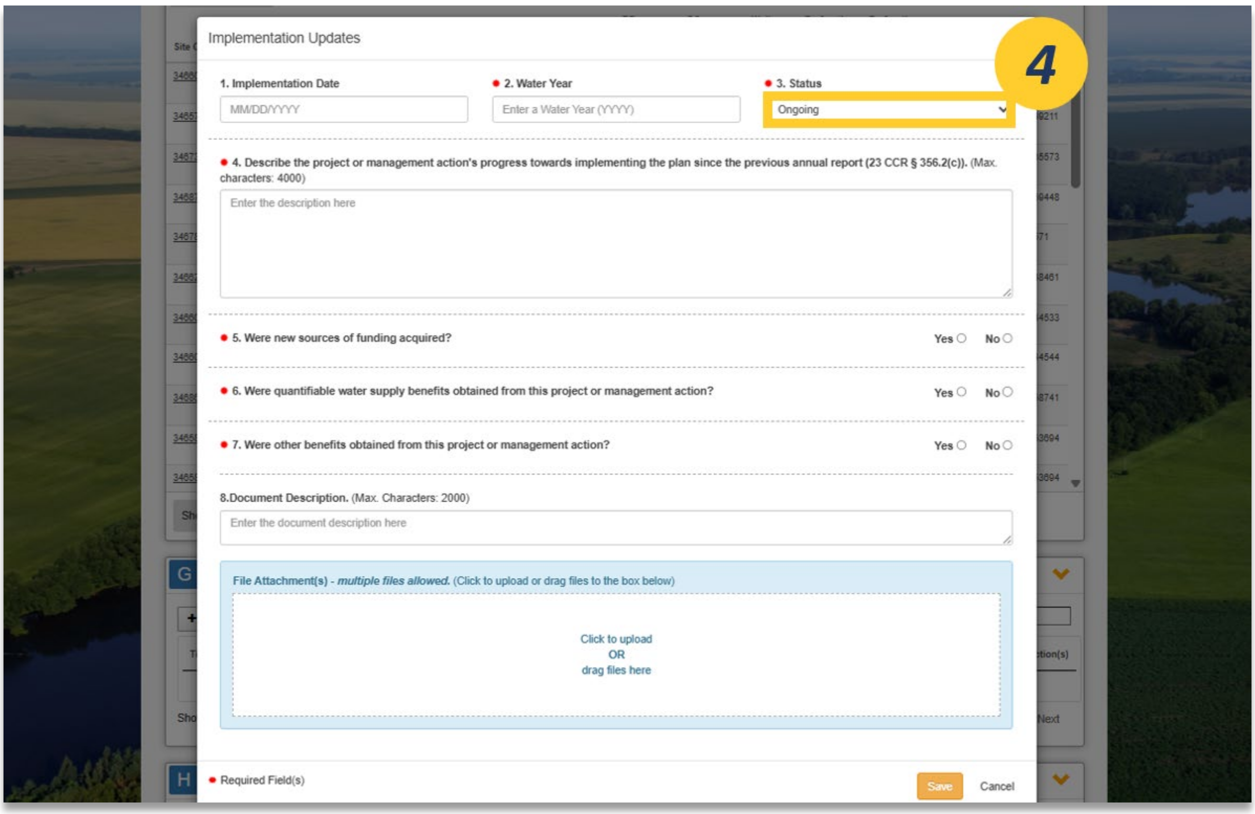


Figure 37. A screenshot of the Implementation Updates form. The "Status" field is highlighted for Step 4. Questions 2, and 4 through 7 are preceded by a red asterisk (""), indicating that these fields are required.*

5. If “**No Update**” is selected for the “**Status**” field, all remaining fields except for “Water Year” are optional.

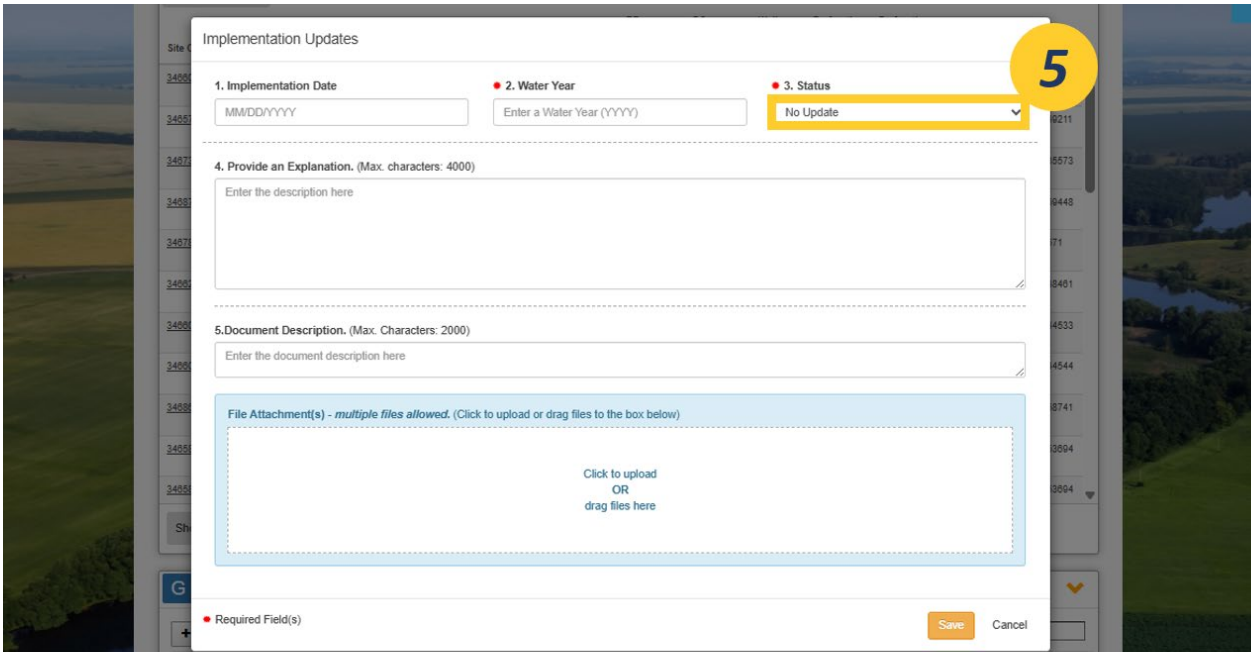


Figure 38. The “Status” field with “No Update” selected is highlighted for Step 5. Question 2, “Water Year”, is another required field on the form.

6. If “**Removed/Withdrawn**” is selected for the “**Status**” field, the PMA will be removed from the list of the GSA’s PMAs. The “Water Year” and an explanation are required.

After submitting this Implementation Update, the GSA will **not** be required to provide future Implementation Updates to the PMA.

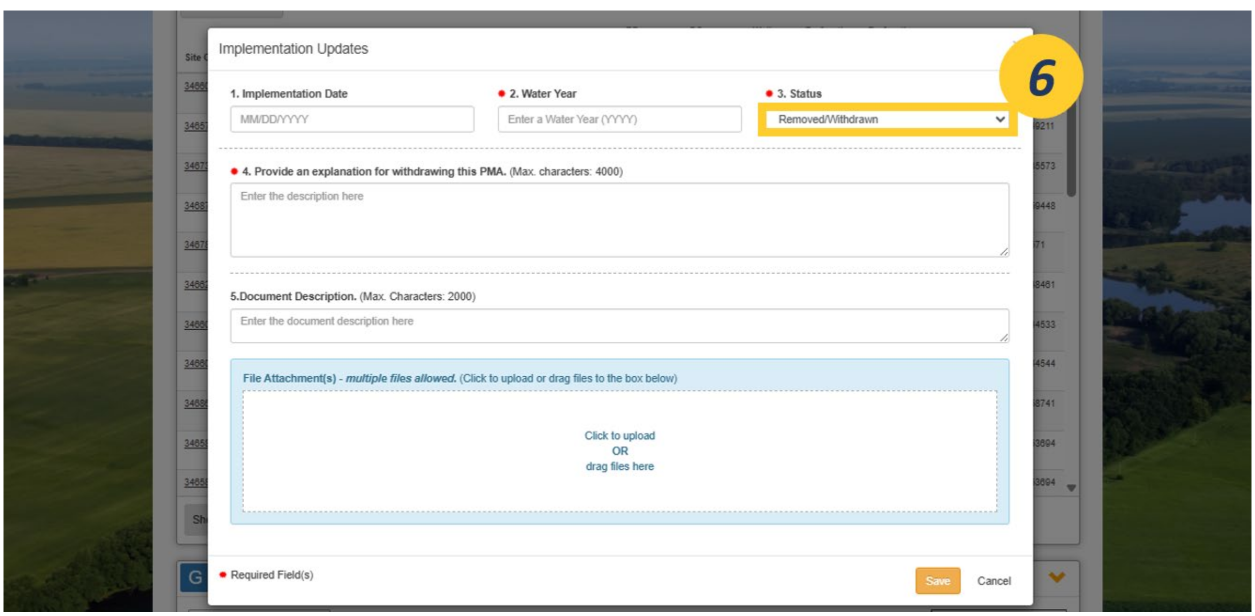


Figure 39. The “Status” field with “Removed/Withdrawn” is highlighted for Step 6. The “Water Year” field and the explanation field are required fields on the form.

7. When the form is complete, click "**Save**".

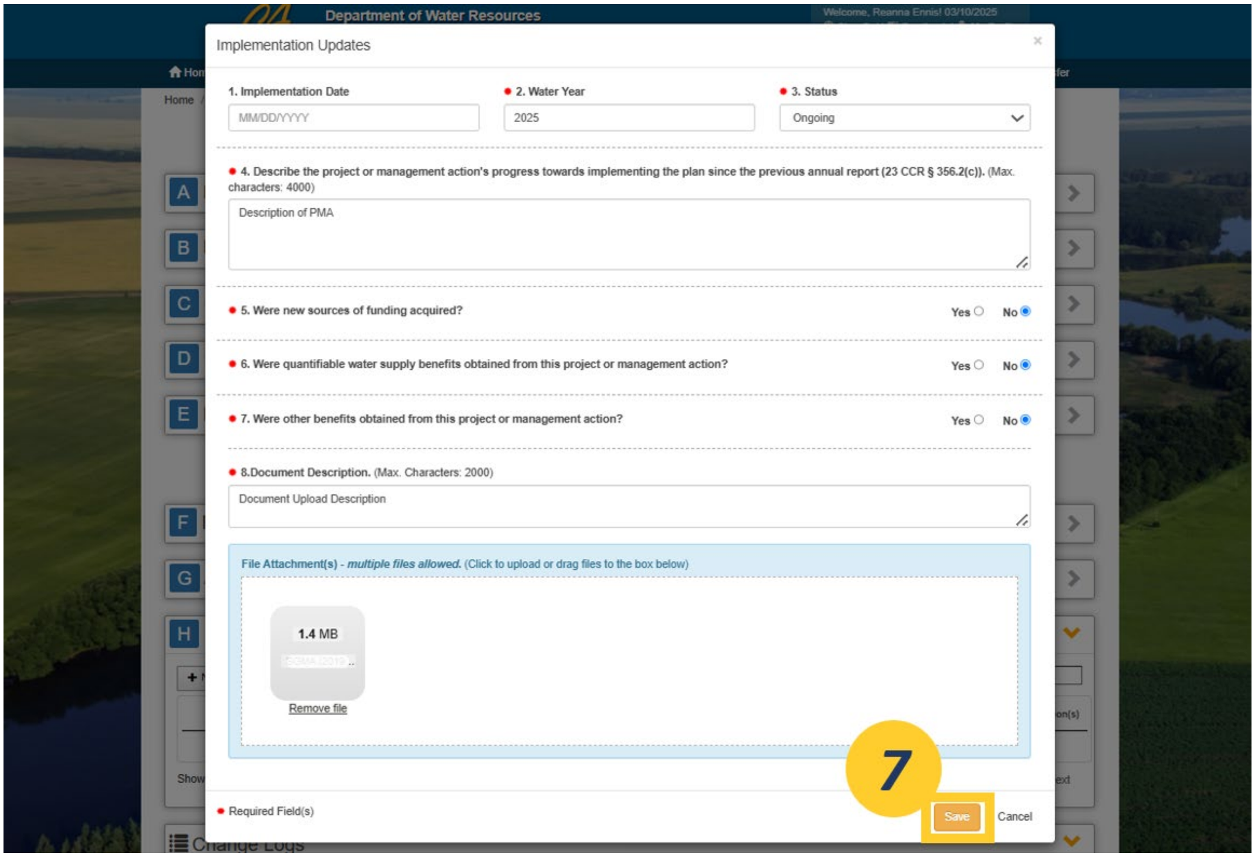


Figure 40. Screenshot of the Implementation Updates form. The "Save" button is highlighted for Step 7.

8. After saving, the update will appear in **Section H** on the PMA's page.

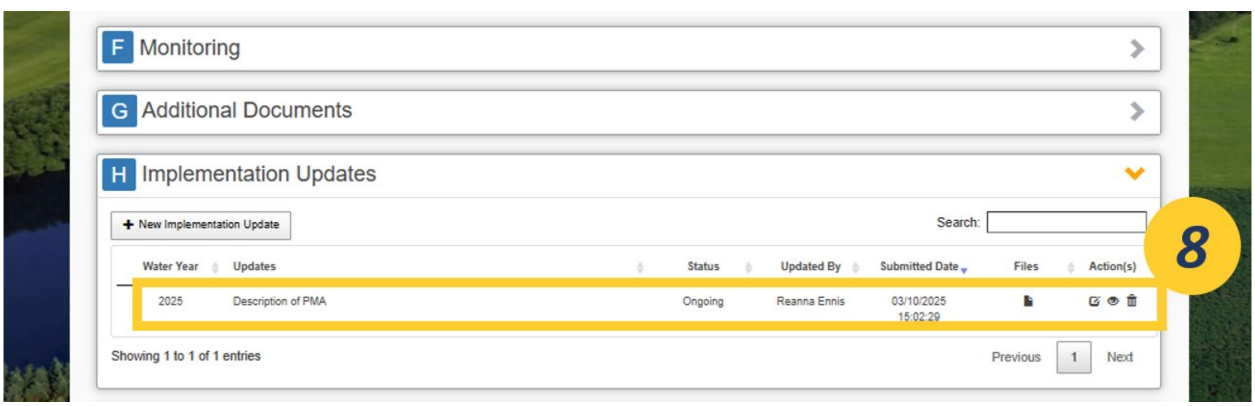


Figure 41. Screenshot of Section H – Implementation Updates on the PMA's page. The recently submitted implementation update is highlighted for Step 8.

5.1.2 Batch Import Method – Adding Implementation Updates

1. Go to the My Projects/Management Actions page. Click the "**Implementation Update – Batch Update**" icon.

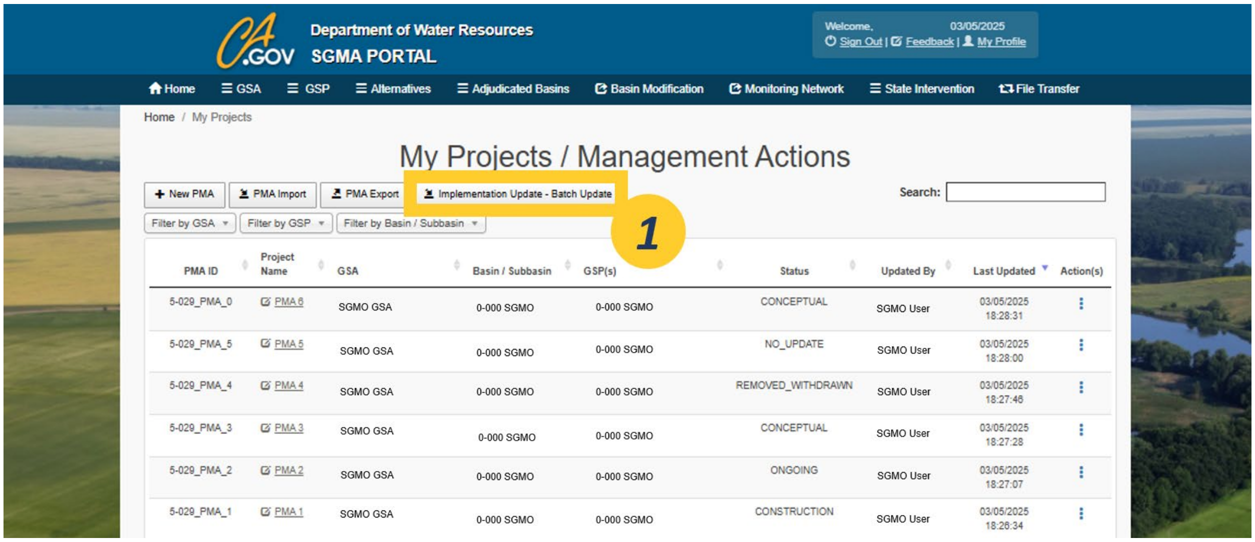


Figure 42. Screenshot of the "My Projects/Management Actions" page. The "Implementation Update – Batch Update" button is highlighted for Step 1.

2. Select a **basin/subbasin** from the dropdown menu.

Only basins that correspond to the GSA(s) that the User is associated with will appear in this menu. If the desired basin/subbasin does not appear in the menu, go to Section 6 for instructions on granting User Permissions.

3. Select an option for downloading the batch update spreadsheet. These selections will partially pre-populate the spreadsheet with information from the PMAs.

The first option, "**All PMAs associated with the basin or subbasin**", will download a pre-populated spreadsheet with all PMAs associated with the selected basin/subbasin.

The second option, "**All PMAs that require an update (# of Updates = 0)**", will download a pre-populated spreadsheet with PMAs from the basin/subbasin that do **not** currently have an associated Implementation Update for a selected water year. If this choice is selected, a box to type in the water year will appear. Type the year in the box.

4. After making the selections, click "**Download Excel Template**".

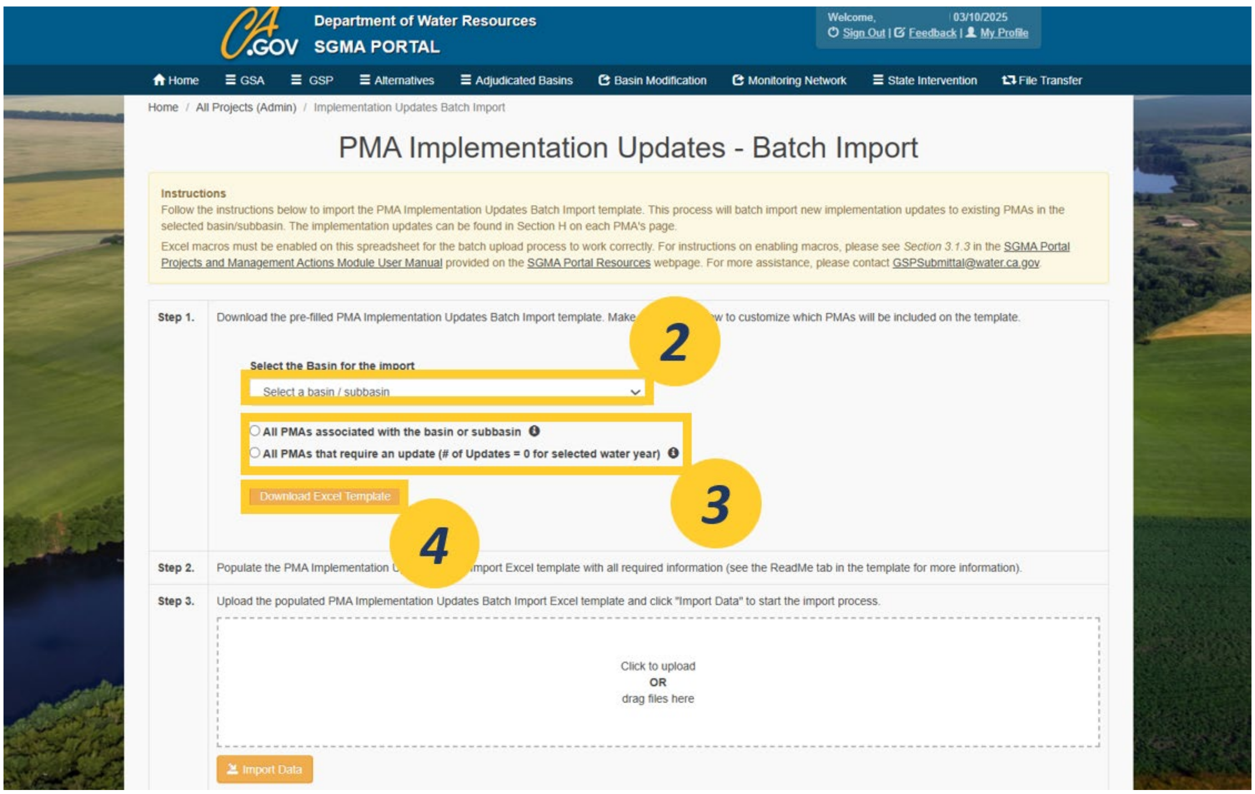


Figure 43. Screenshot of the "PMA Implementation Updates – Batch Import" page. The basin/subbasin dropdown menu is highlighted for Step 2. The two options for downloading the batch update spreadsheet are highlighted for Step 3. The "Download Excel Template" button is highlighted for Step 4.

5. Open the newly downloaded excel file. Macros must be enabled for the spreadsheet to work correctly. See Section 3.1.3 for instructions to enable macros.

The "**PMA DB ID**", "**PMA ID**", "**PMA Name**", "**Basin**", "**Lead GSA(s)**", and "**GSP**" columns will be pre-populated depending on your selection in the previous step.

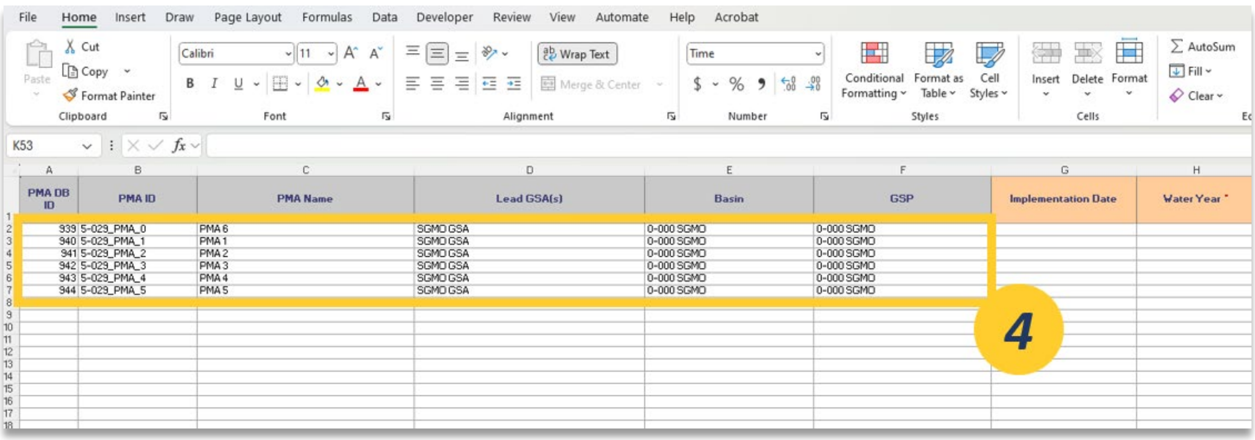


Figure 44. A screenshot of the downloaded excel sheet. The pre-populated columns are highlighted for Step 4.

6. If you do not wish to upload an Implementation Update to a certain PMA, you can delete the entire pre-populated row. You must delete the **entire row** – do **not** delete cells or shift cells, or you may import the Implementation Updates to incorrect PMAs.

To delete the entire row, right-click on the row heading (the number which labels the rows) on the left side of the spreadsheet to highlight the **entire row**. A menu will appear.

7. Click "**Delete**" in the menu. The **row** will delete.

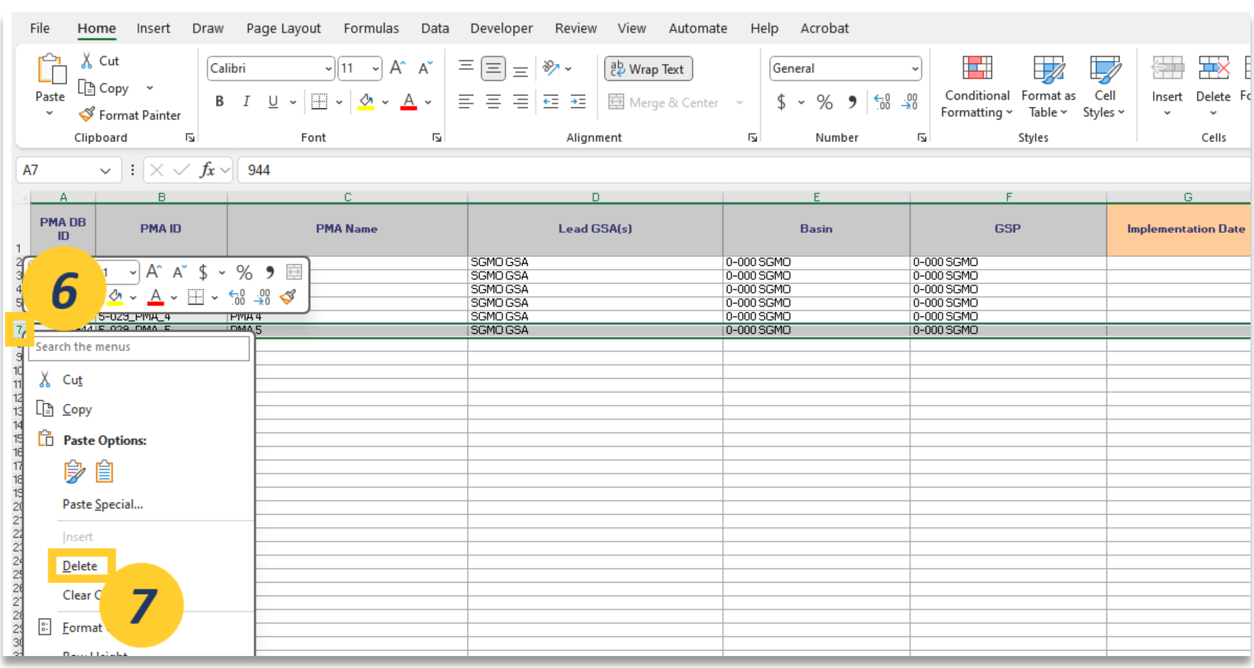


Figure 45. A screenshot of the Batch Import excel template. The row heading area to right-click is highlighted for Step 6. The "Delete" option in the menu is highlighted for Step 7.

8. Fill in the required columns. Required fields are marked with a red asterisk ("*") and conditionally required fields are marked with two blue asterisks ("**").

The required fields will change depending on your selections in certain fields. The spreadsheet will gray out fields that are no longer required depending on your selection in other fields.

9. To read more about field descriptions and requirements, go to the "**Field Descriptions**" tab.

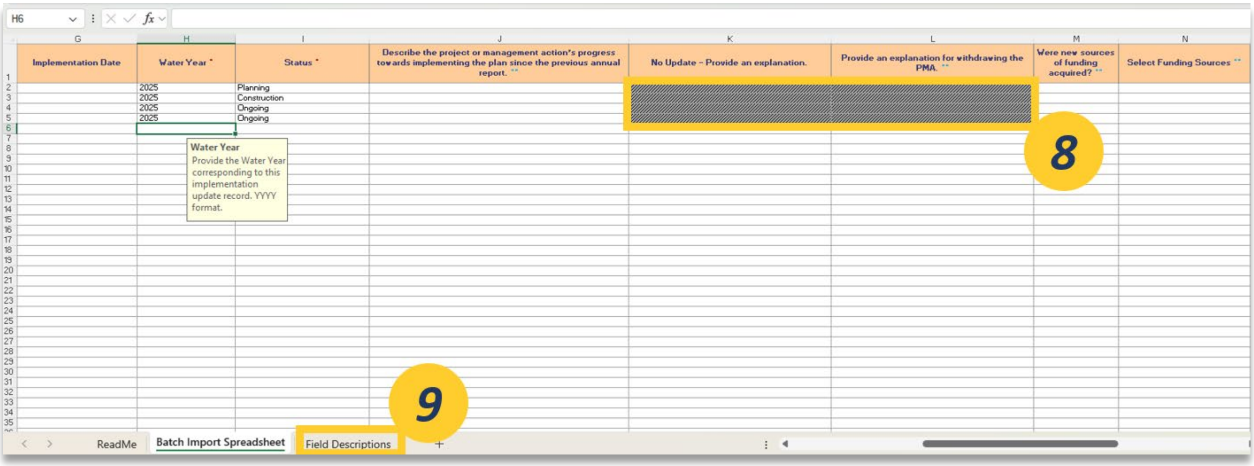


Figure 46. A screenshot of the Batch Import Spreadsheet for Implementation Updates. Grayed out fields on the spreadsheet are highlighted for Step 8. The "Field Descriptions" tab is highlighted for Step 9.

10. After the spreadsheet is completed, close the spreadsheet. Go back to the **PMA Implementation Updates – Batch Import** page. Upload the completed spreadsheet by clicking to upload or dragging the files into the upload box.

11. After you upload your spreadsheet, click the "**Import Data**" button.

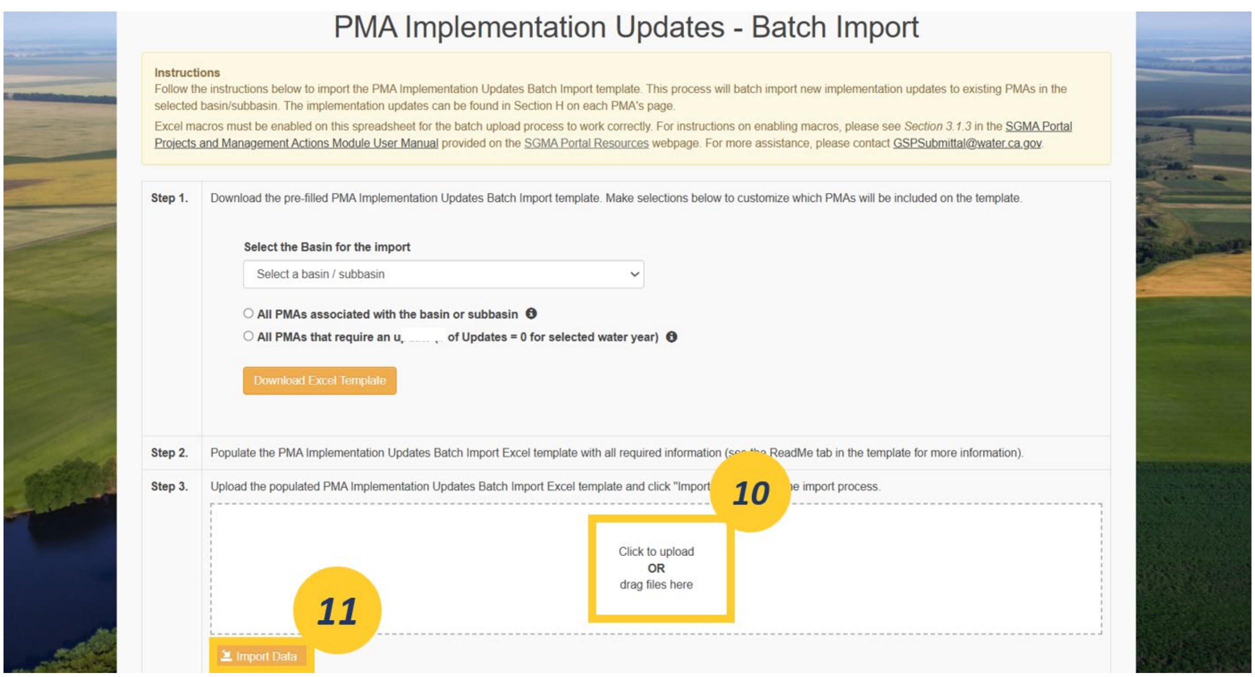


Figure 47. Screenshot of the "PMA Implementation Updates – Batch Import" page. The box to upload the completed spreadsheet is highlighted for Step 10. The "Import Data" button is highlighted for Step 11.

12. If you have errors on your uploaded spreadsheet, an “**Error(s)**” popup box will appear. This means that no Implementation Updates were imported. Fix the indicated errors on your spreadsheet and re-upload.

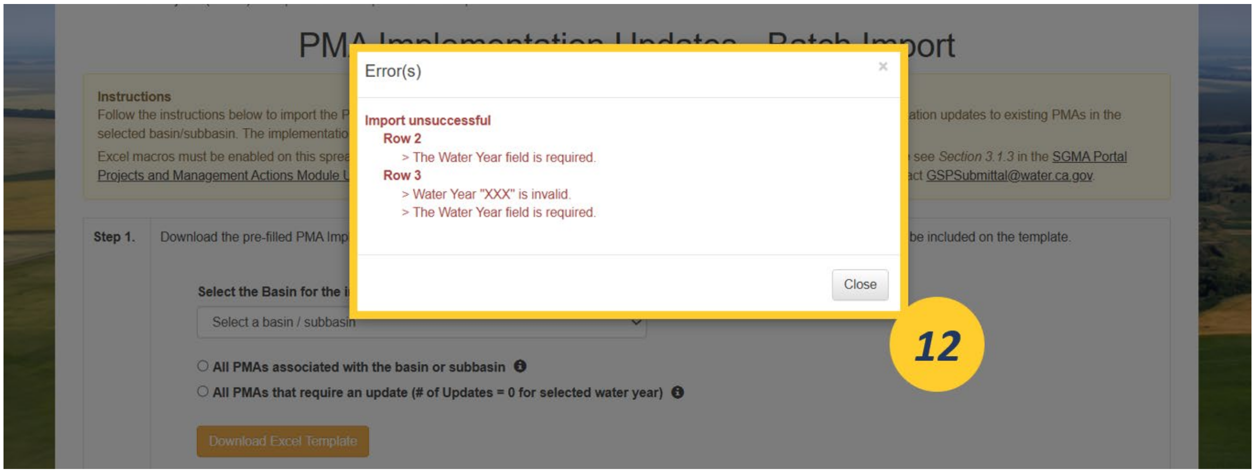


Figure 48. A screenshot of the “Error(s)” popup box, indicating which rows in the uploaded spreadsheet contain errors.

13. If there are no errors on your spreadsheet, you will get a “Success” popup box indicating that your Implementation Updates have been uploaded successfully.

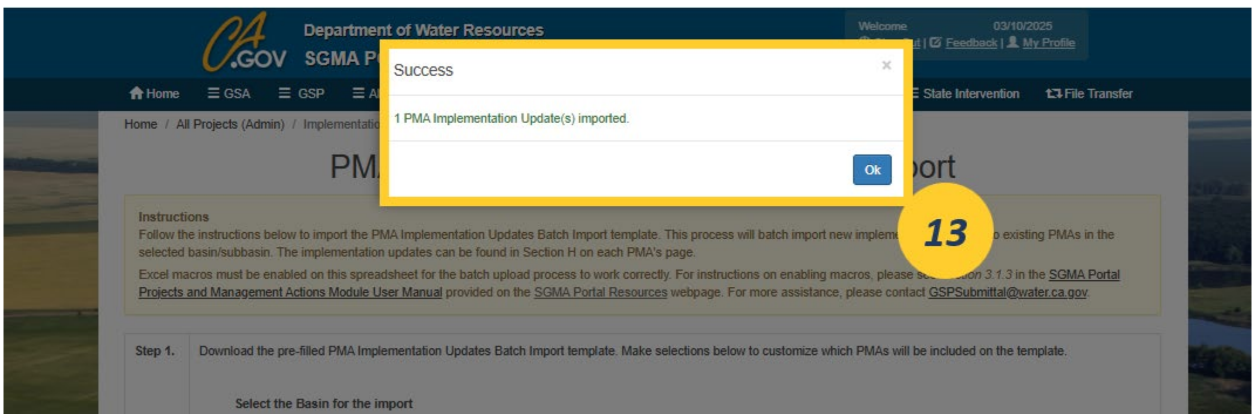


Figure 49. A screenshot of the “Success” popup box, indicating that the Implementation Updates were uploaded successfully.

14. After the batch import process is completed, you will be able to see the newly imported implementation updates in **Section H** of the respective PMAs.

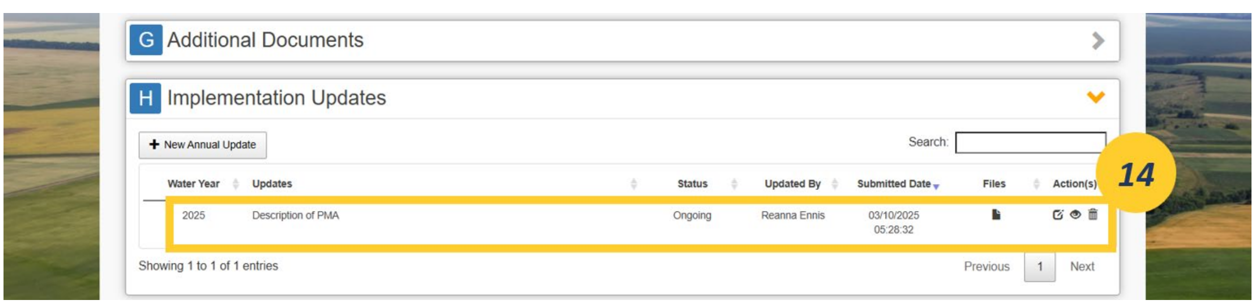


Figure 50. A screenshot of Section H on a PMA’s page, highlighting the newly imported Implementation Update for Step 14.

5.2 Providing Implementation Updates via the Annual Reporting Module

The PMA Module page within the Annual Reporting Module was developed to allow GSAs to verify and add Implementation Updates to their PMAs as needed prior to submitting their Annual Report.

The User can navigate to the Annual Reporting Module through their GSP Dashboard. For more information about the Annual Reporting Module, see the GSP Annual Reporting Module User Manual.

1. While editing an Annual Report within the Annual Reporting Module, click **Section G - "PMA Module"** on the sidebar. You will be taken to the "**PMA Module**" section.

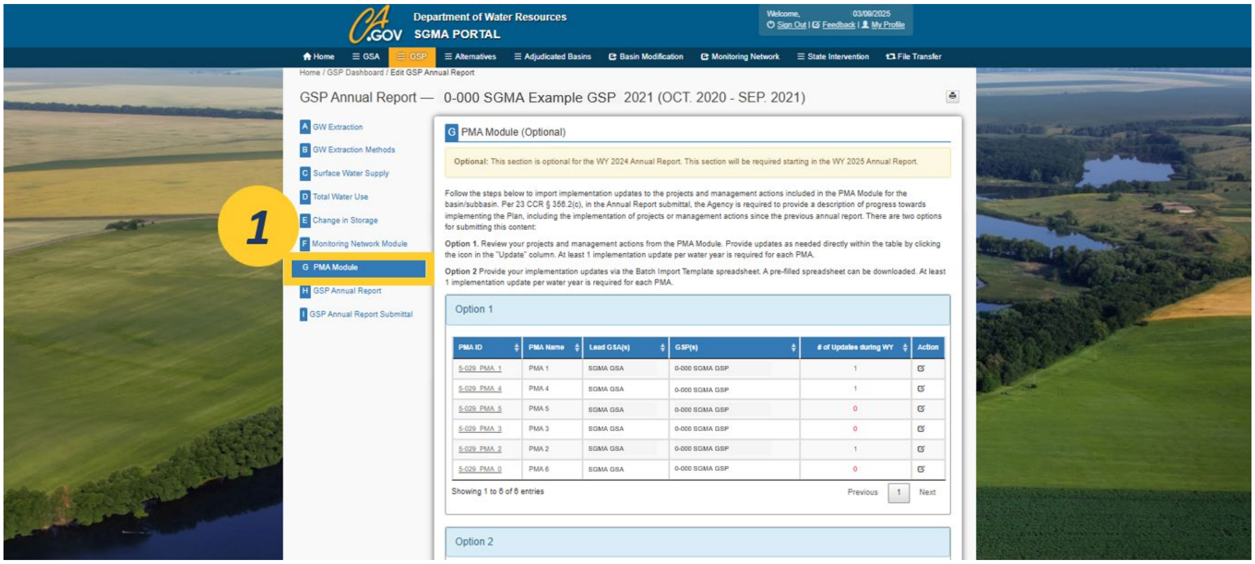
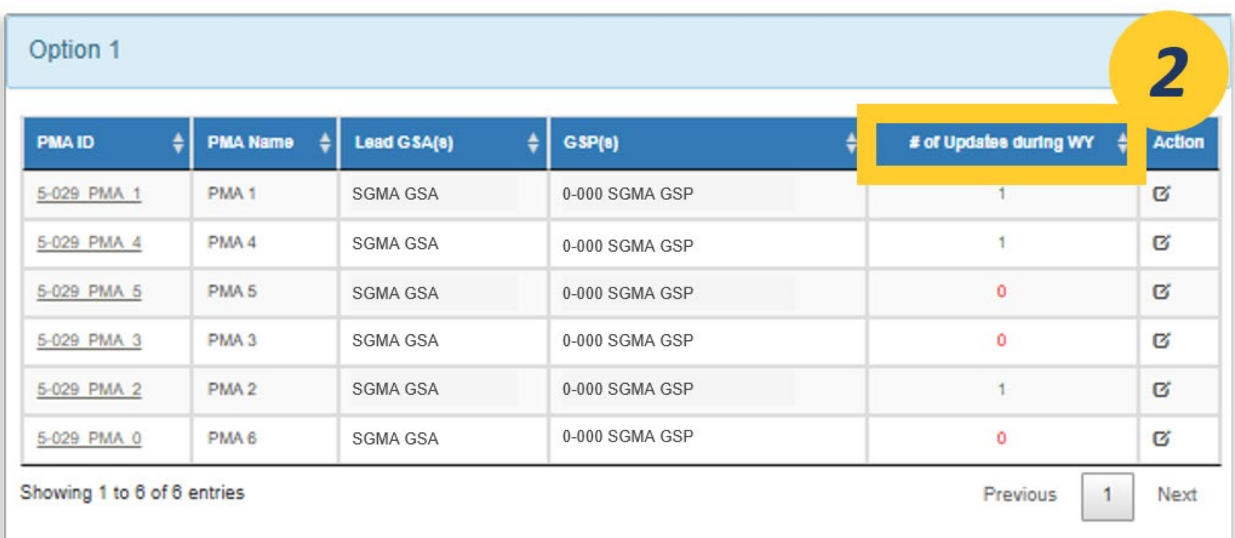


Figure 51. A screenshot of the Annual Reporting Module. Section G on the sidebar is highlighted for Step 1.

2. The table shows the PMAs within the basin. The "**# of Updates during WY**" column shows the number of Implementation Updates that have been provided for the water year (corresponding to the water year of the Annual Report). Note that the table does not show PMAs that have been previously removed/withdrawn.



PMA ID	PMA Name	Lead GSA(s)	GSP(s)	# of Updates during WY	Action
5-029_PMA_1	PMA 1	SGMA GSA	0-000 SGMA GSP	1	
5-029_PMA_4	PMA 4	SGMA GSA	0-000 SGMA GSP	1	
5-029_PMA_5	PMA 5	SGMA GSA	0-000 SGMA GSP	0	
5-029_PMA_3	PMA 3	SGMA GSA	0-000 SGMA GSP	0	
5-029_PMA_2	PMA 2	SGMA GSA	0-000 SGMA GSP	1	
5-029_PMA_0	PMA 6	SGMA GSA	0-000 SGMA GSP	0	

Showing 1 to 6 of 6 entries   Previous 1 Next

Figure 52. A screenshot of the table containing the PMAs within the basin. The "# of Updates during WY" column is highlighted for Step 2.

3. There are two options to provide Implementation Updates within the Annual Reporting Module.

Option 1 allows Users to submit their Implementation Updates directly within the table. This option uses the same form described in Section 5.1.1 to provide the implementation updates individually to each PMA. For instructions for using Option 1, go to Section 5.2.1.

Option 2 allows Users to batch import their Implementation Updates to submit multiple updates to multiple PMAs simultaneously. For instructions on using Option 2, go to Section 5.2.2.

5.2.1. Option 1 - Adding Individual Implementation Updates in the Annual Reporting Module

1. Navigate to "**Option 1**" within PMA Module section of the Annual Reporting Module. In the table, navigate to the desired PMA. Click the icon in the "**Action**" column.

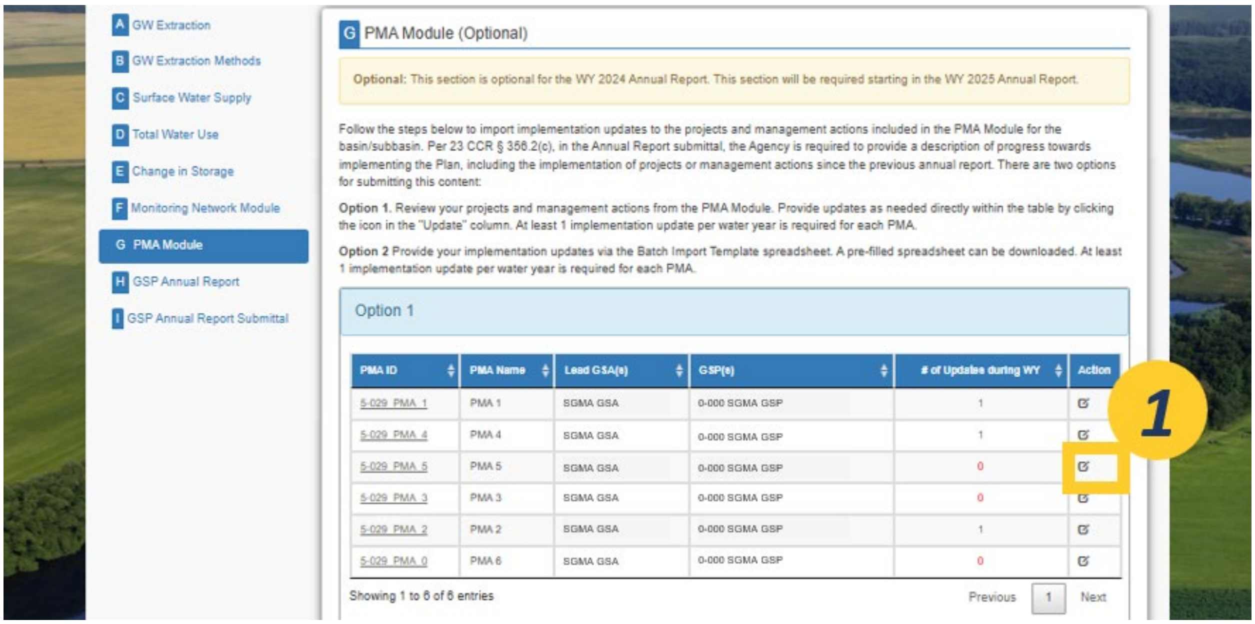
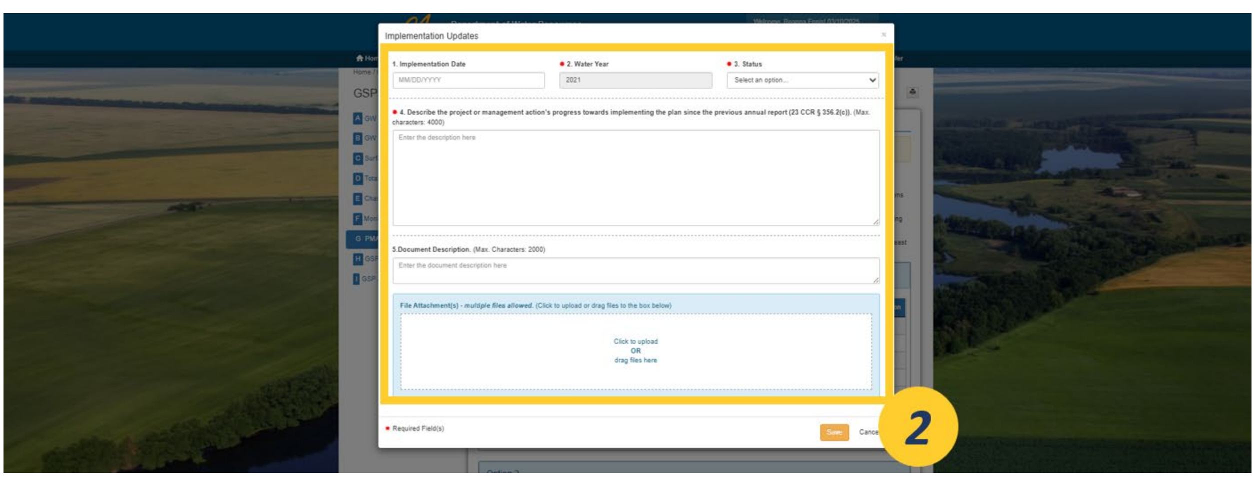


Figure 53. A screenshot showing the table in Option 1. The icon in the "Action" column is highlighted for Step 1.

2. The **Implementation Updates form** will pop up. Fill out the required information.

For more information about the fields and the required information on this form, see Section 5.1.1, starting at **Step 4.**



`

Figure 54. A screenshot of the Implementation Updates form. The fields are highlighted for Step 2.

3. Once you have completed the form with the required information, click "**Save**".

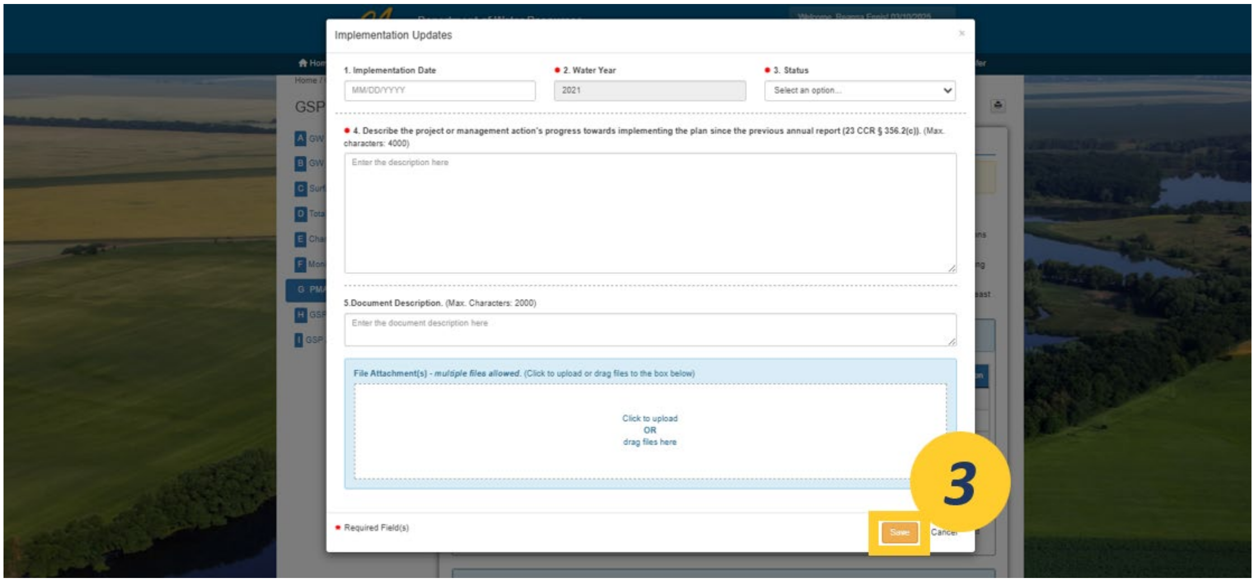


Figure 55. A screenshot of the Implementation Updates form. The "Save" button is highlighted for Step 3.

4. After the update saves, this Implementation Update will be reflected in the table's "**# of Updates during WY**" column.

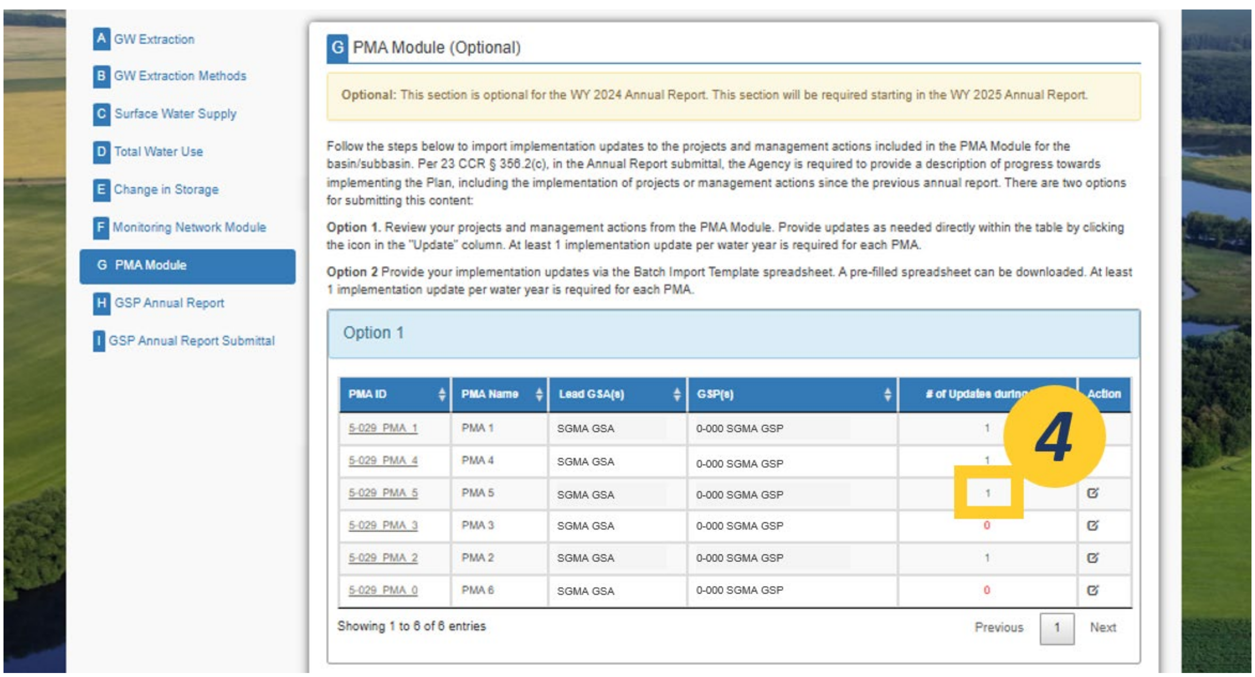


Figure 56. A screenshot showing the table in Option 1. An entry in the "# of Updates during WY" column showing a "1" is highlighted for Step 4. This indicates that the Implementation Update has been submitted.

5. After you submit an update through this table, you can view the update on the PMA's page. You can navigate to the page by clicking the **hyperlink** in the "**PMA ID**" column. The PMA's page will open in a new tab.

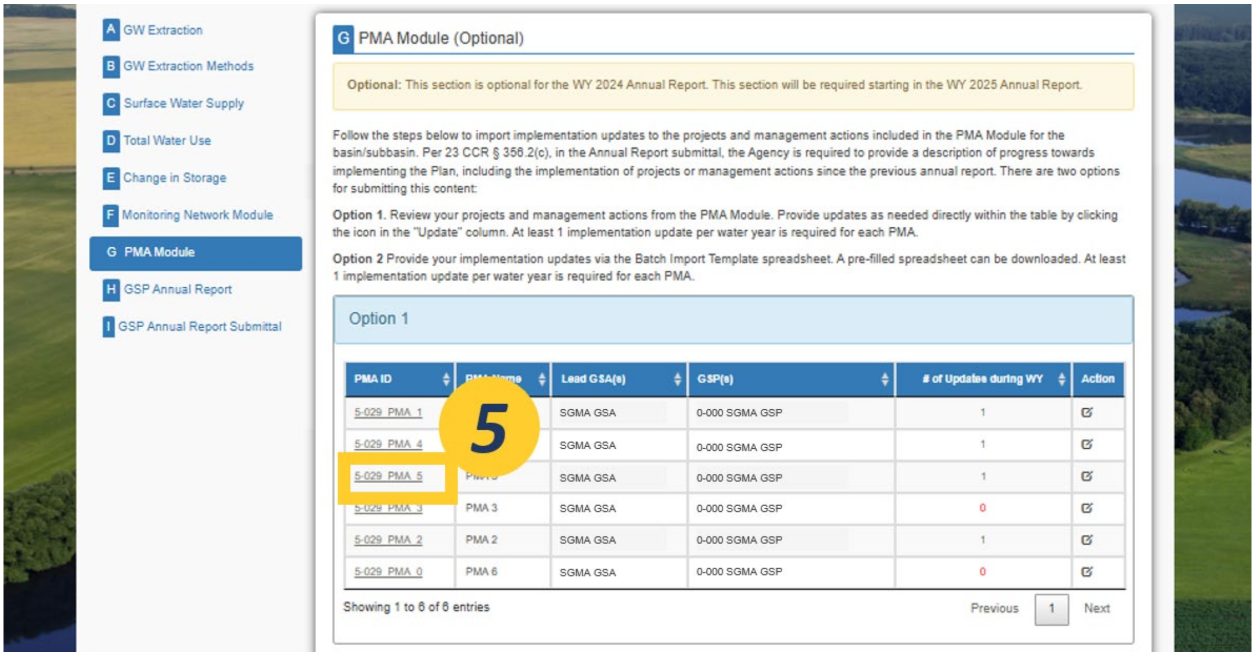


Figure 57. A screenshot showing the table in Option 1. A hyperlink is highlighted for Step 5 in the "PMA ID" column.

6. Navigate to **Section H** of the PMA page. The Implementation Update that was just submitted through the Annual Reporting Module will be viewable and editable within this section.

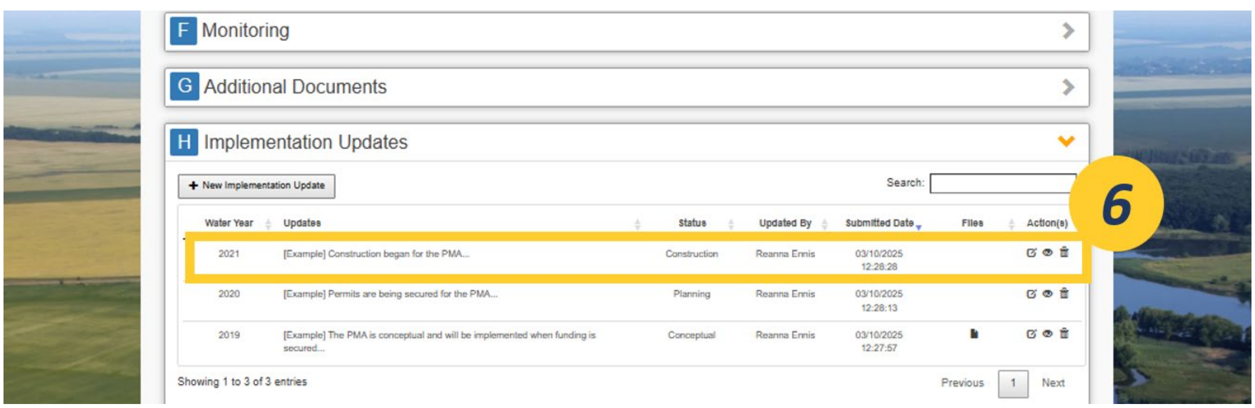


Figure 58. A screenshot showing Section H of a PMA page. The Implementation Update submitted through the Annual Reporting Module is highlighted for Step 6.

5.2.2. Option 2 – Batch Importing Implementation Updates in the Annual Reporting Module

1. Navigate to "**Option 2**" within PMA Module section of the Annual Reporting Module.

Select an option for downloading the batch update spreadsheet. The downloaded spreadsheets are partially **pre-populated** with information from the PMAs in the basin/subbasin. The selection that the User makes will determine which PMAs are included on the spreadsheet. Make a selection between the following options:

The first option, "**All PMAs associated with the basin or subbasin**", will download a spreadsheet pre-populated with all PMAs associated with the selected basin/subbasin.

The second option, "**All PMAs that require an update (# of Updates = 0)**", will download a pre-populated spreadsheet with PMAs from the basin/subbasin that do **not** currently have an associated Implementation Update for the Annual Report's water year. Please note that you can still utilize the "**# of Updates during WY**" column in the table in "**Option 1**" to verify the number of updates that each PMA has. If this option is selected, then the only PMAs that are pre-populated within the spreadsheet are the PMAs that have "**0**" updates in the "**# of Updates during WY**" column.

2. Once you have made your selection, click "**Download Excel Template**".

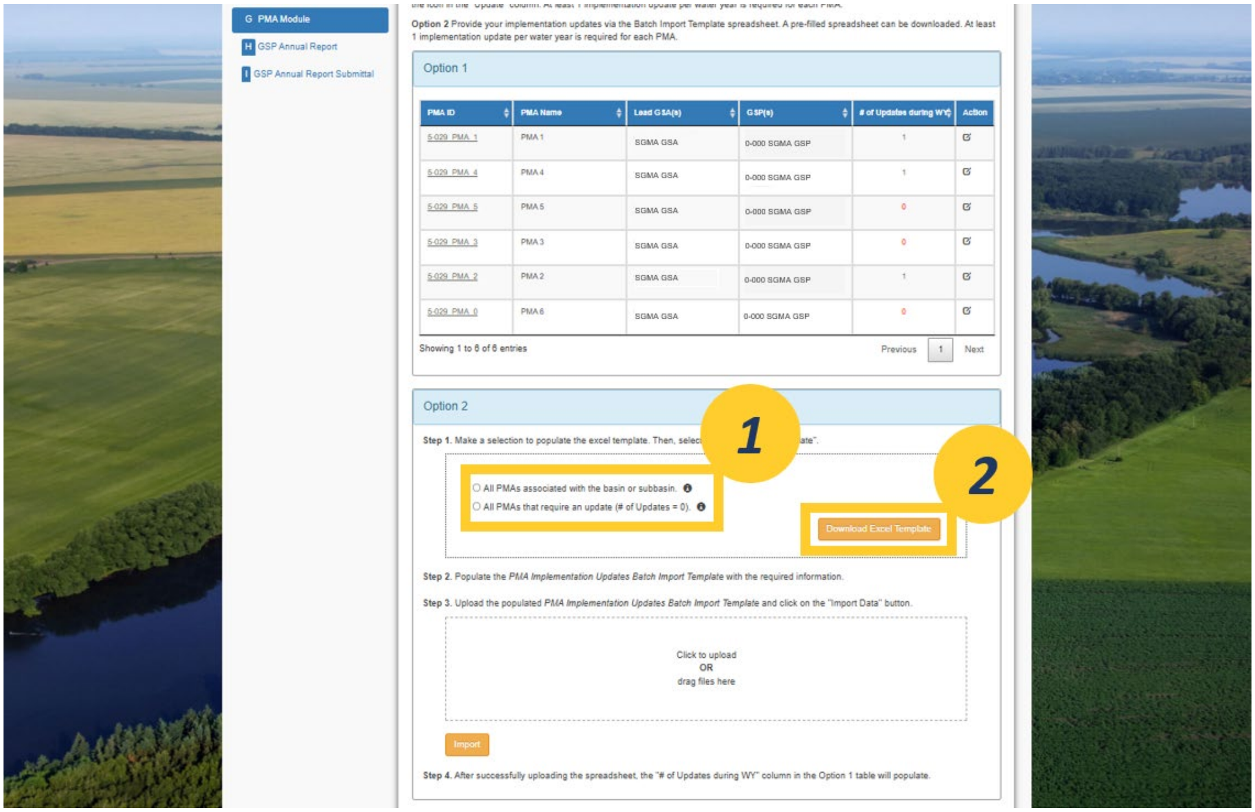


Figure 59. A screenshot of the PMA Module page within the Annual Reporting Module. The page is scrolled down to "Option 2". The spreadsheet download options are highlighted for Step 1. The "Download Excel Template" button is highlighted for Step 2.

3. For instructions and information about using the downloaded batch import spreadsheet, **follow Steps 5 through 9** in [Section 5.1.2](). Ensure that macros are enabled so that the spreadsheet can be uploaded correctly (See [Section 3.1.3]() for instructions on enabling macros).

Come back to this step once you have completed filling out the batch import template.

4. Once you have completed the batch import spreadsheet, make sure to **close the spreadsheet.** Return back to the **Annual Reporting Module's PMA Module section.**

5. Drag and drop or click to upload the completed spreadsheet in the designated upload box.

6. Click "**Import**".

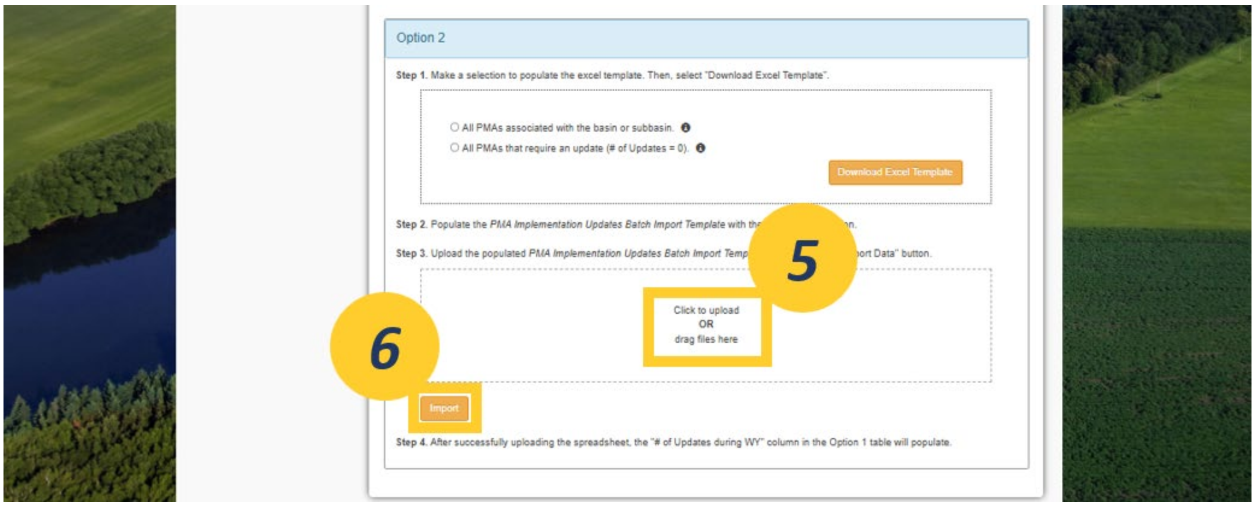


Figure 60. A screenshot of "Option 2" in the Annual Reporting Module's PMA Module Section. The designated upload box is highlighted for Step 5. The "Import" button is highlighted for Step 6.

6. If you have errors on your uploaded spreadsheet, an "**Error(s)**" popup box will appear. This means that no Implementation Updates were imported. Fix the indicated errors on your spreadsheet and re-upload the corrected spreadsheet.

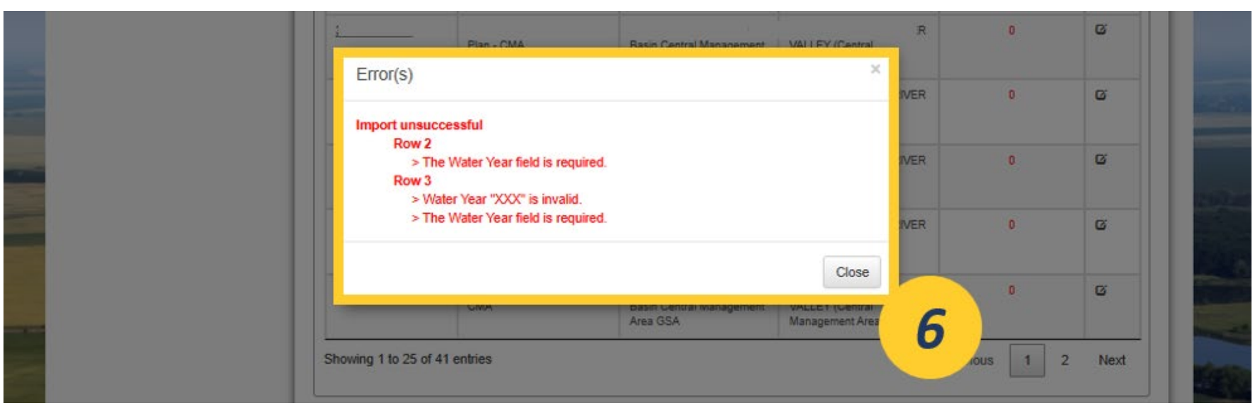


Figure 61. A screenshot of the "Error(s)" popup box, indicating which rows in the uploaded spreadsheet contain errors.

7. If there are no errors on your spreadsheet, you will get a "**Success**" popup box indicating that your Implementation Updates have been uploaded successfully.

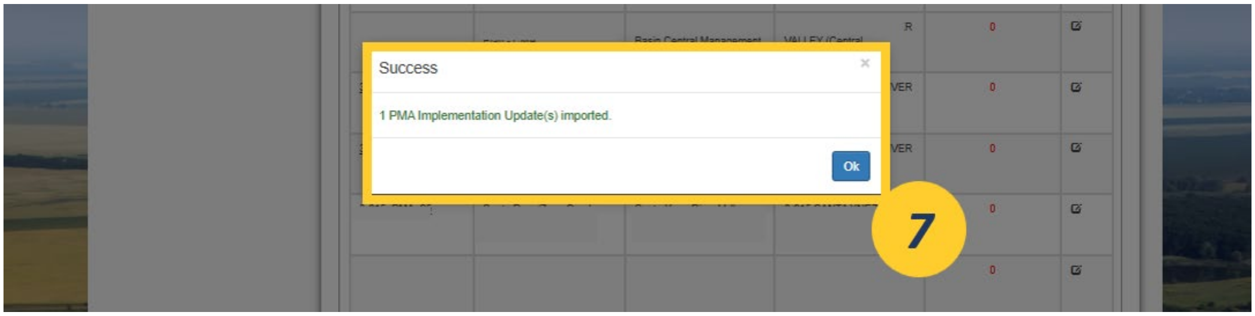


Figure 62. A screenshot of the "Success" popup box, indicating that the Implementation Updates were uploaded successfully.

8. After successfully uploading the Implementation Updates, the number of Implementation Updates will automatically update in the "**# of Updates during WY**" column in the table in **Option 1**.

If you do not see the correct number of updates after successfully submitting a batch import spreadsheet, manually reload the page.

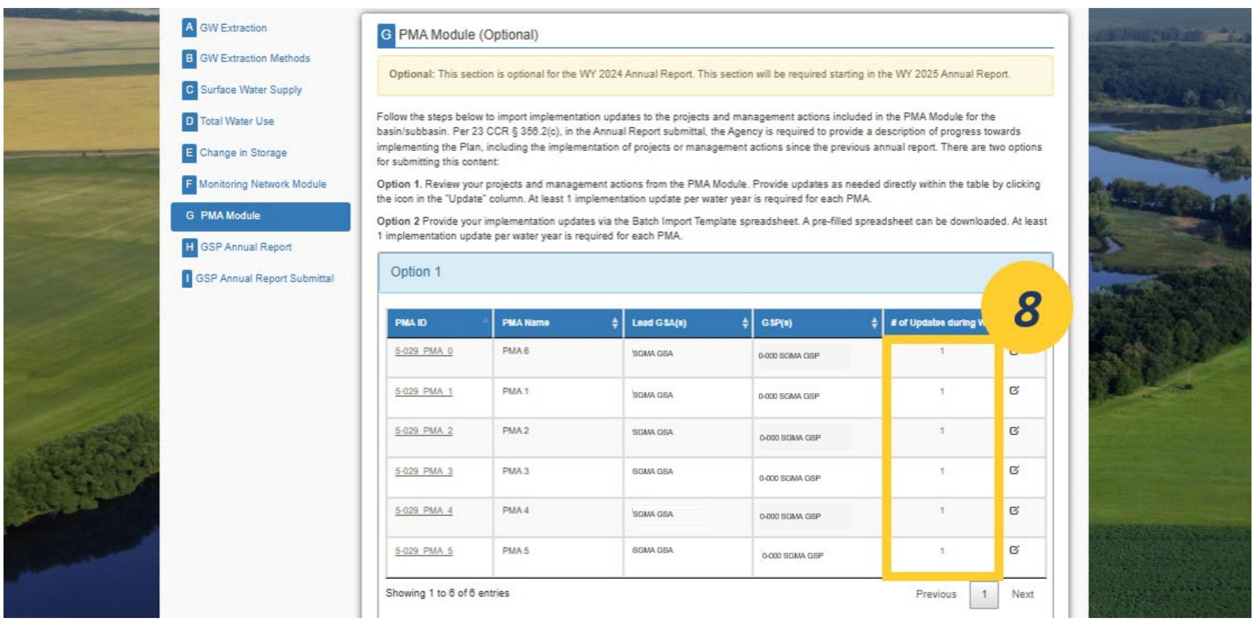


Figure 63. A screenshot of the table in "Option 1". The "# of Updates during WY" column is highlighted for Step 8. All of the PMAs have 1 Implementation Update, some of which were added by using the batch import tool in "Option 2".

9. After submitting Implementation Updates through the batch import tool, you will be able to see the Implementation Updates in **Section H** of the respective PMAs.

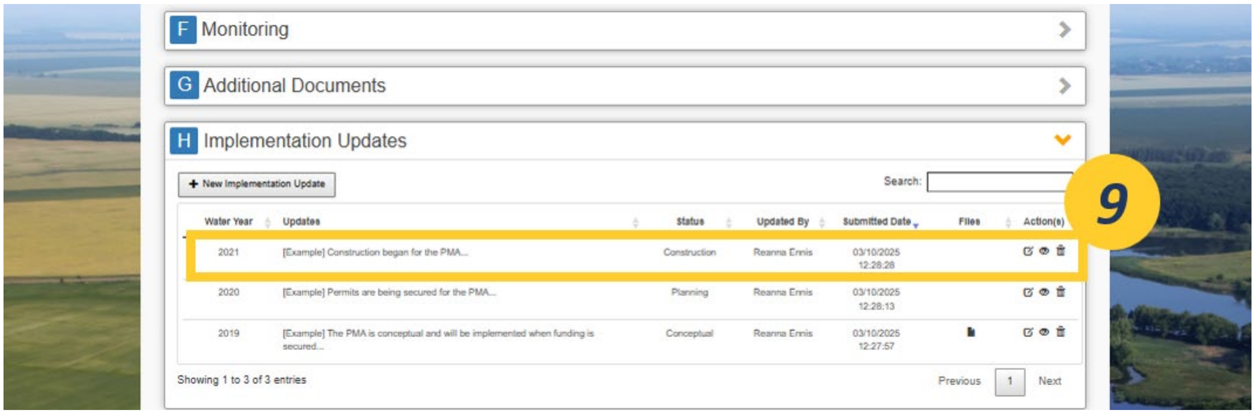


Figure 64. A screenshot showing Section H of a PMA page. The Implementation Update submitted through the batch import tool in "Option 2" is highlighted for Step 9.

6. Granting Users Permissions to Projects and Management Actions

The **Projects and Management Actions Module** provides two ways to assign permissions to Users to allow them access to PMAs.

Users can be provided with general access to all PMAs associated with the Lead GSA by being granted permissions to the Lead GSA. Users that are granted permissions to the GSA will be able to access various data on the SGMA Portal such as access to previously submitted materials by the GSA (GSP, Annual Reports, etc.), access to the materials on the Monitoring Network Module, and the ability to submit new materials on behalf of the GSA. The process of granting a User access to a GSA is provided in Section 6.1.

Users can be provided access to specific PMAs without being granted full access to the Lead GSA. The process of granting a user access to specific PMAs is provided in Section 6.2.

6.1 Assigning a User Permissions to the Lead GSA

1. While logged into the account of a User with "**Admin**" permissions to the Lead GSA, hover over the "**GSA**" option in the menu to open the GSA dropdown list. Click "**My GSAs**" to be navigated to the "**My GSA Formation Notices**" page.

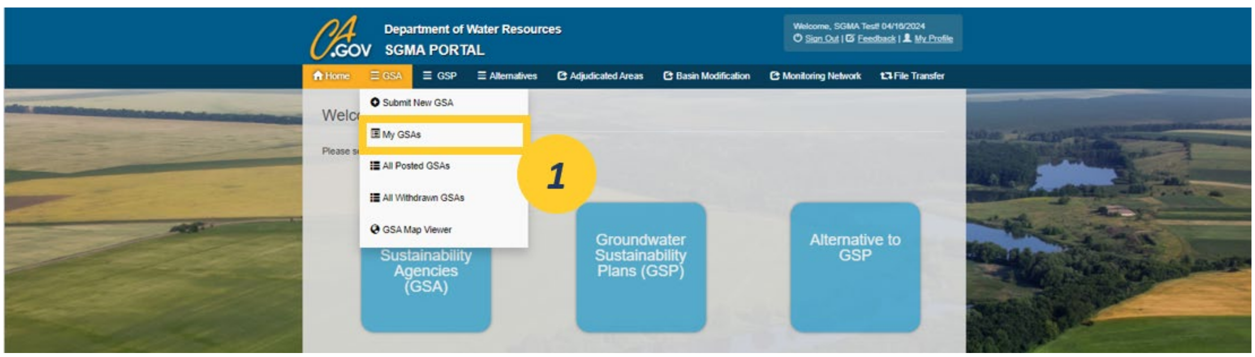


Figure 65. Screenshot of the SGMA Portal. The GSA dropdown menu is open highlighting the "My GSAs" option.

2. Click the three dots under the "**Action(s)**" column for the desired GSA. Select "**Assign Permission**" from the drop-down menu to be navigated to the "**GSA User & Access**" page.

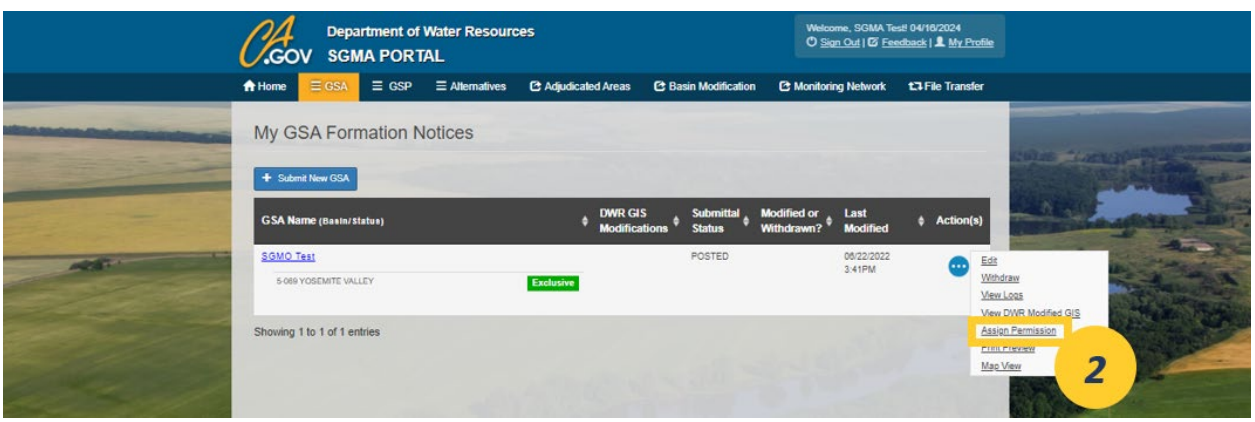


Figure 66. Screenshot of the "MY GSA Formation Notices" page. The drop-down menu under "Actions" is open with the "Assign Permission" option highlighted.

3. In the "**Grant Access**" box, begin typing the name of the specified User to be added to the GSA. Click the name of the specified User when it appears.

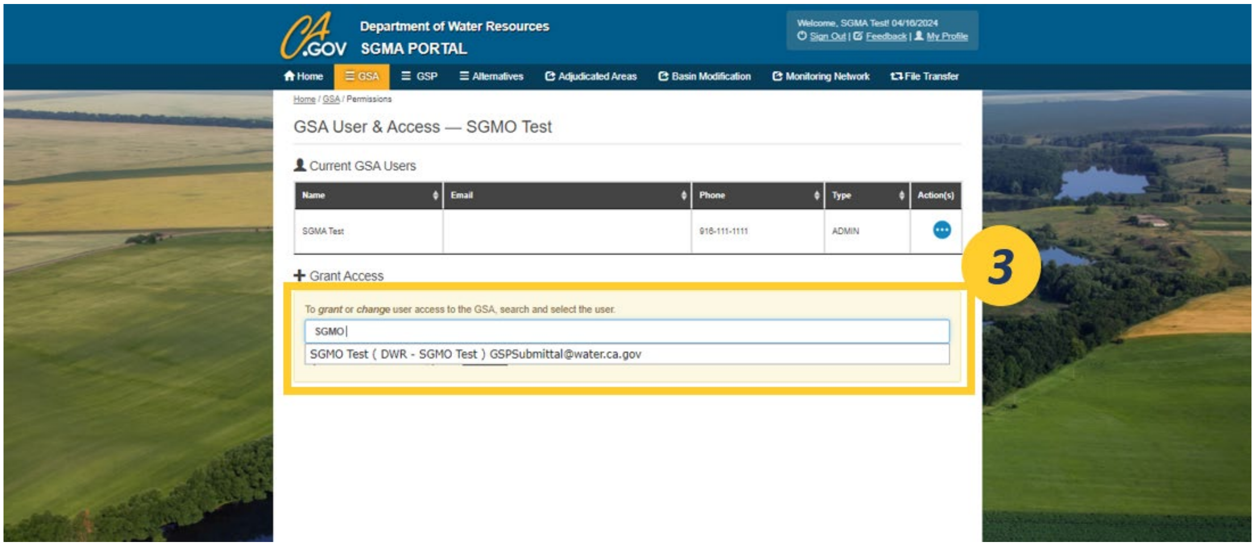


Figure 67. Screenshot of the "GSA User & Access" page. The "Grant Access" box is highlighted.

4. The "Grant User Access Confirmation" popup box will appear. Choose one of the options to grant the specified user the desired level of access to the GSA.

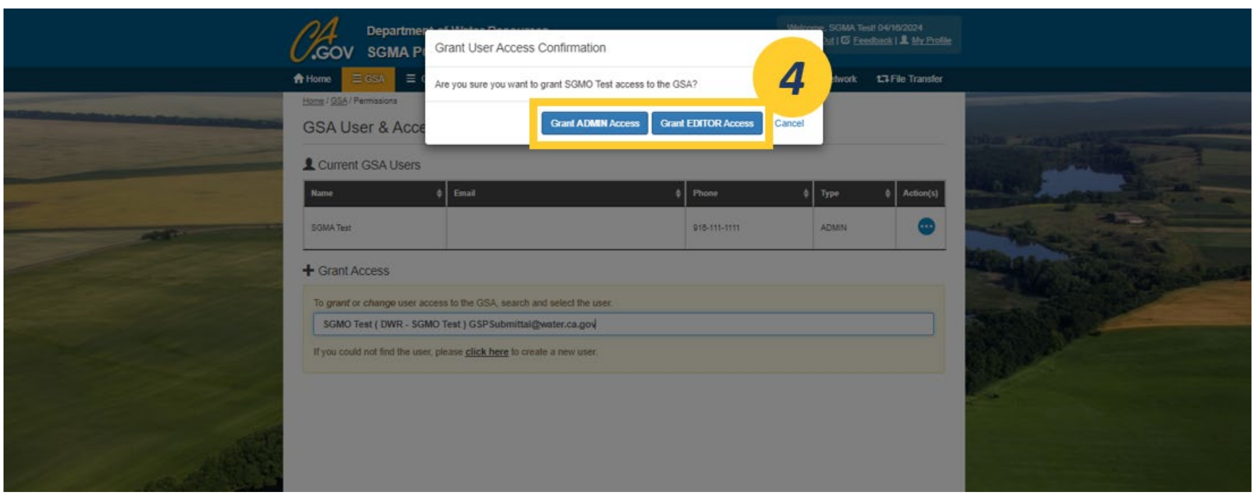


Figure 68. Screenshot of the "GSA User Access Confirmation" popup box. The access options are highlighted.

5. A “**Success**” popup box will appear when the User is successfully assigned permissions to the GSA.

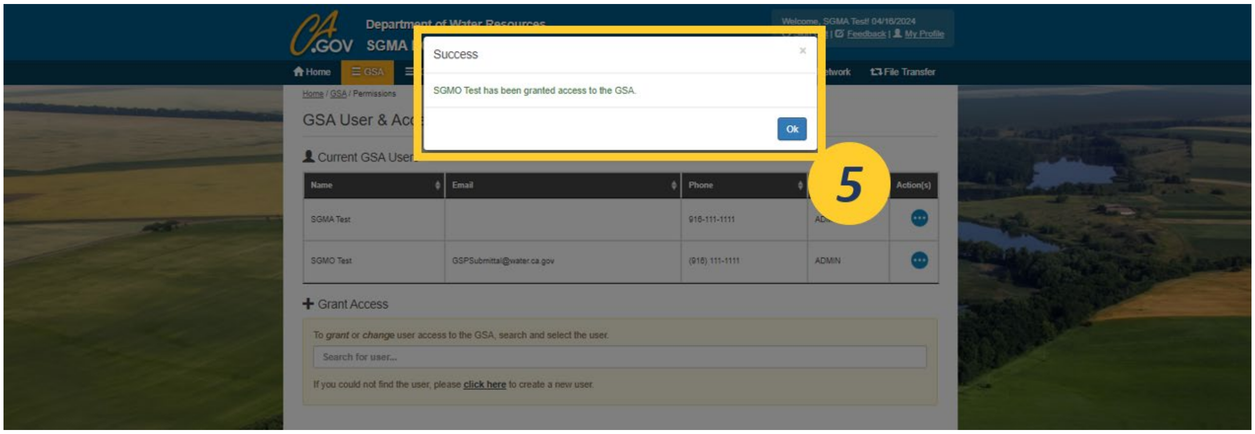


Figure 69. Screenshot of the “Success” popup box that appears after a User is successfully assigned permissions to the GSA.

6. The User will now appear in the Permissions table for the GSA on the “GSA User & Access” page. This User will now have access to all PMAs that are associated with the GSA.

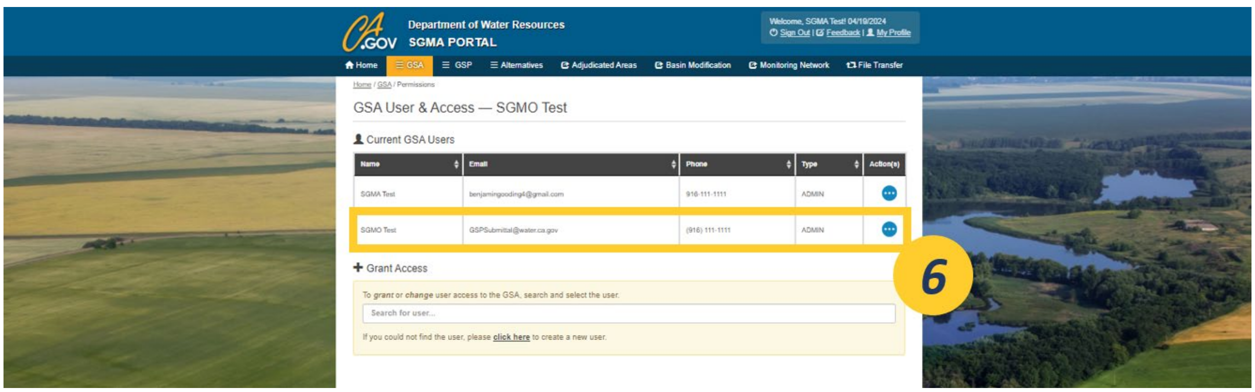


Figure 70. Screenshot of the GSA User & Access page, highlighting the newly added User in the table.

6.2 Assigning a User Permissions to a Specified PMA

1. Starting from the “**My Projects/Management Actions**” page, navigate to the PMA that will have permissions assigned to it. Go to the “**Action(s)**” column and click the three dots. In the drop-down menu, click “**Permissions**”.

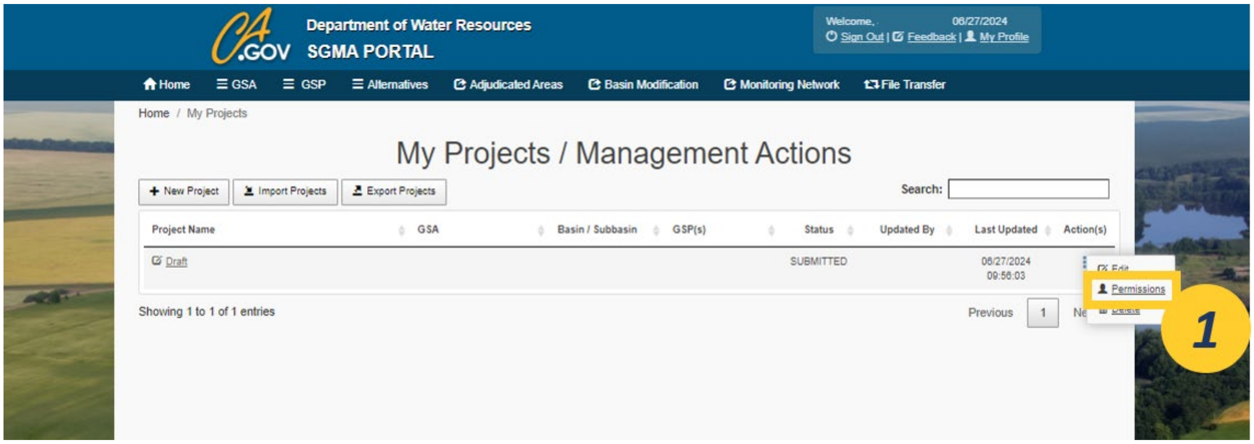


Figure 71. Screenshot of the “My Projects/Management Actions” page. The dropdown menu under the “Action(s)” column is open, highlighting the “Permissions” option.

2. The “**Project – Users & Permissions**” page will load. Click the “**Grant New User**” button.

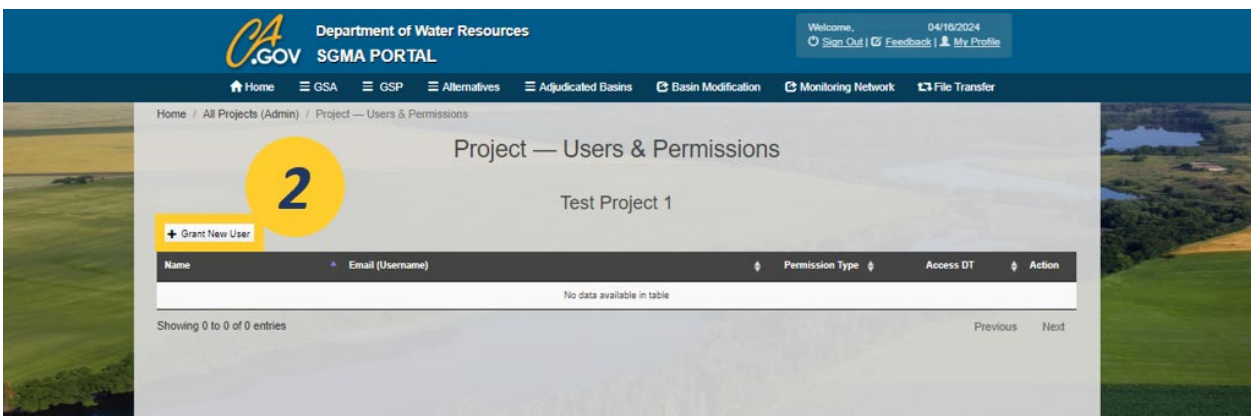


Figure 72. Screenshot of the “Project – Users & Permissions” page. The “Grant New User” button is highlighted.

3. The **User Permission** form will open. Type the User's name that will be granted access into the "**User**" field and select the permission type for the User in the "**Permission Type**" field.

4. Click "**Save**".

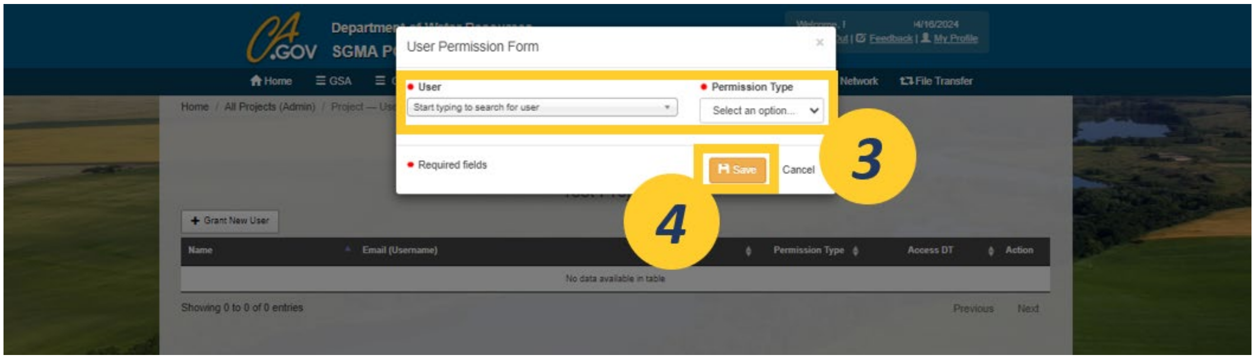


Figure 73. Screenshot of the User Permission Form. The "User" and "Permission Type" fields are highlighted for Step 3. The "Save" button is highlighted for Step 4.

5. After the User is successfully granted permissions to the specified PMA, a "**Success**" popup box will appear.

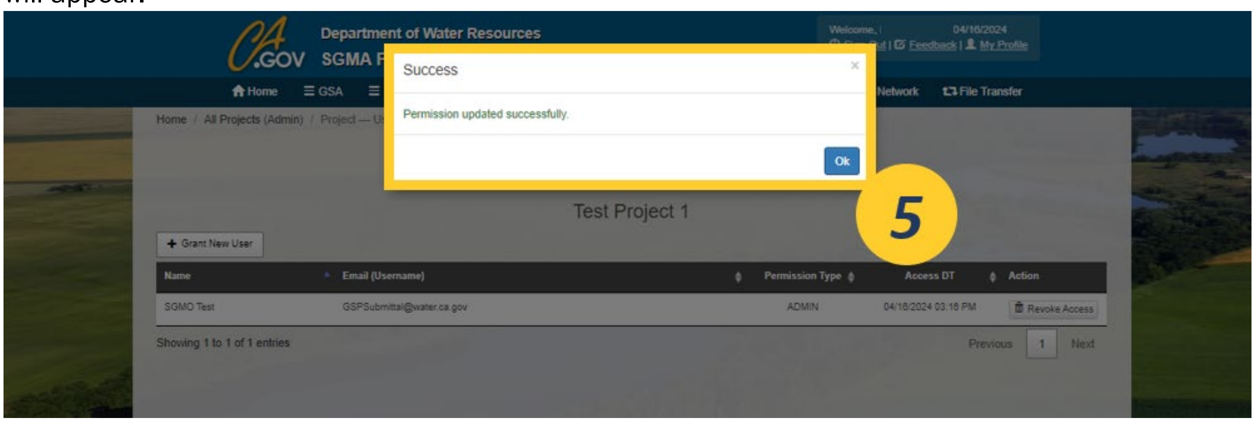


Figure 74. A screenshot of the "Success" popup box, which appears after a User is successfully granted permissions to a PMA, is highlighted.

6. The User's information will appear in the "**Project – Users & Permissions**" table for the specified PMA. The User will now have the ability to view, edit, and provide updates to the specified PMA.

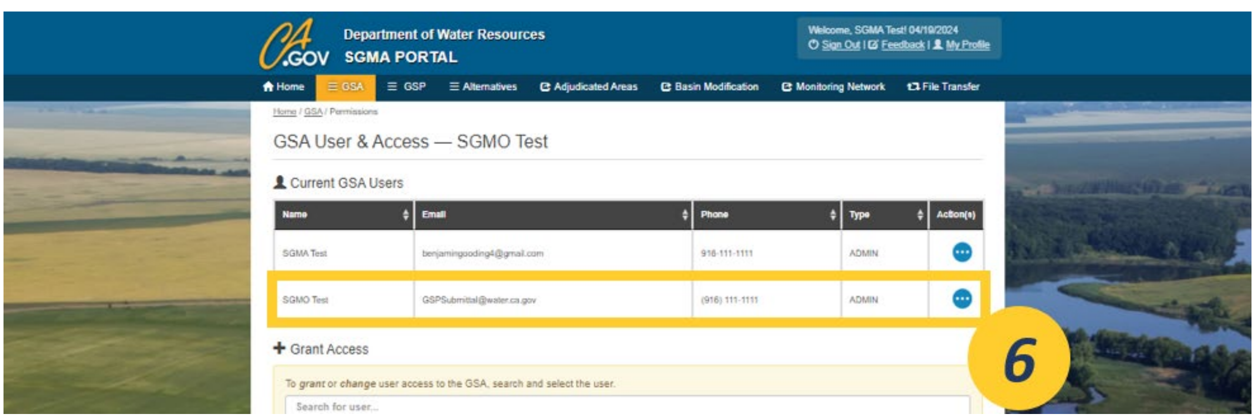


Figure 75. Screenshot of the "Project – Users & Permissions" page, with the newly added User in highlighted in the table.