Reportnet 3.0 Reporter HowTo

Version 3.10 (01-08-2024)

Contents

1 Logging on and user profile

1.1 How to log on to the production platform

1. Go to https://reportnet.europa.eu/
2. A notification for allowing notifications from Reportnet is displayed. It is recommended to allow them.

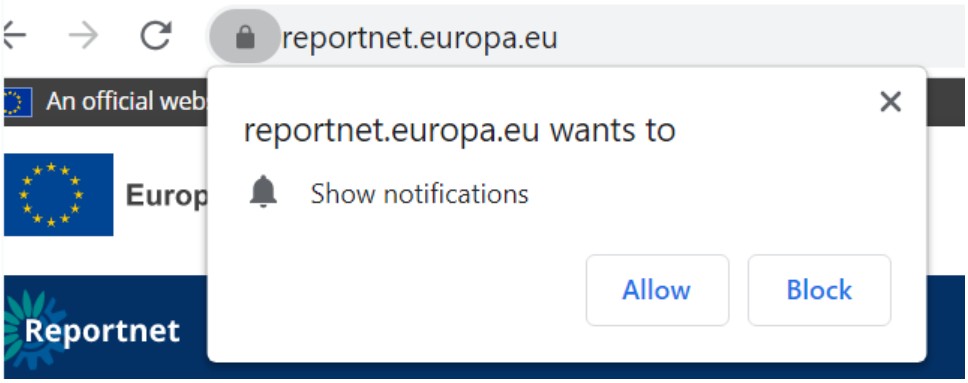


Figure 1 Allow showing notifications

3. Following steps are detailed in a separate HowTo.
4. A dialogue with cookies information appears like in other EEA pages.

1.2 How to log on to the test platform

1. Go to https://rn3test.eionet.europa.eu/
2. Log on by using your email.

1.3 How to change my profile picture

1. On any screen, click on the **'User profile details'** button in the left menu.
2. Click on the picture space to either select a default Avatar or upload your own image.

1.4 How to change my global settings

1. On any screen, click on the **'User profile details'** button in the left menu.
2. Available global settings can be managed from this page.
   - **Pagination rows** - Configure the number of rows displayed in the pagination.
   - **Date Format** - Select the desired date format to visualize.
   - **Theme** - Choose the theme to display in the system.
   - **Type of view** - Choose default layout to search obligations and dataflows.
   - **Logout confirmation** - Configure the way to logout with or without a confirmation popup.
   - **Basemap layer** - Configure the default basemap layer for your map.

1.5 How to log off

1. On any page, click on the power button in the top right or bottom left of the screen.
2. By default, you will be asked to confirm you wish to log off, however this can be turned off in your global settings or in the same pop-up window by clicking “Do not ask again”.

2 Dataflows

2.1 Dataflows overview

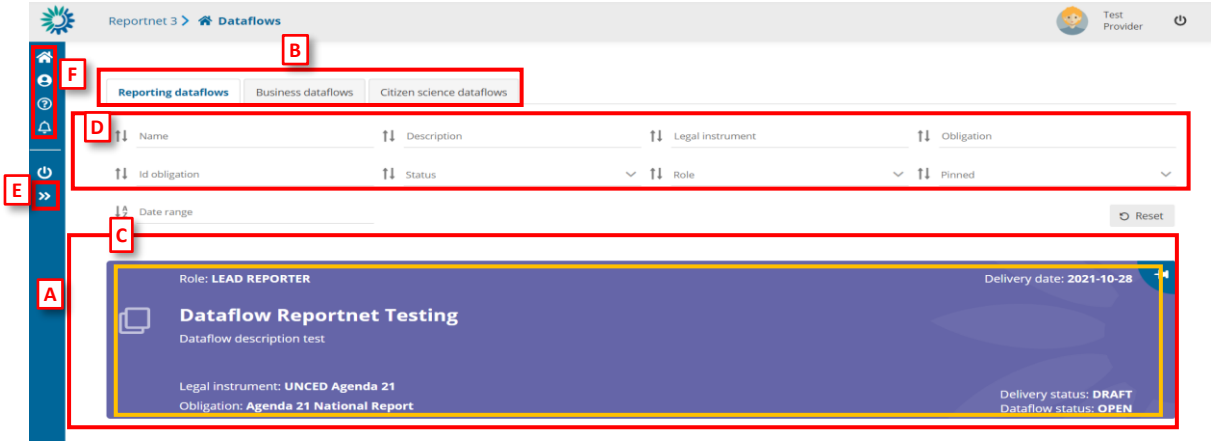


Figure 2 Dataflow list

- [A] – The main part of the page comprises the list of dataflows which you have access to – 'Reporting dataflows' and 'Business dataflows'.
- [B] – The list of the 'Reporting dataflows', 'Business dataflows' and 'Citizen science dataflows'
- [C] – A dataflow is colour coded according to the current status – grey in design and purple when reporting is open. On the dataflow card, you can see various metadata – Your role; Delivery date; Dataflow name; Dataflow description; Associated obligation and instrument; Reporting datasets status; Status.
- [D] – Filters and sort on the various metadata of the dataflows list allow you to find things easily in the dataflows list.
- [E] – This button will expand the menu, to show the icon labels.
- [F] – The static menu is available on every page and has four buttons. From top to button, the buttons are:
    - My dataflows – will return you to this page.
    - User profile details – allows you to manage some global settings and see your user profile.
    - Help – Triggers a help walkthrough of the page you are currently on.
    - Notifications – Provides the history of all notifications (which appear in the top right of the screen) as a list. Note: the indicator only tells that the process has started or ended and there is no progress bar to know the percentage of the process (import, validate, …). Also, although the indicator says that a process has been sent, it doesn't mean that it has started processing. Depending on the number of other processes that are in ReporteNet3 server maybe it will be held waiting in queue until other previous processes have finished.

2.2 How to sort and filter my dataflow list

1. The dataflow list is by default ordered first by status (design dataflows at the top) and secondly by delivery date (descending).
2. Each of the metadata fields on the dataflows (name, description, legal instrument, obligation, status, role, date range of, etc) can be filtered or sorted

on using the filter bar at the top of the dataflows list. The filters are applied on entering.

3. Combinations of more than one filter can be used.
4. The button on the right **'Reset'** will put the list back to its default state.

2.3 How to pin a dataflow

1. There is a **pin** icon in the top right of each dataflow card.
2. When clicking on pin, there is a notification message. The dataflow displays a pin icon in the right side and it goes to top of the list.
3. When I have others already pinned, it keeps the same order criteria than when unpinned.
4. When I unpin any, there is a notification message. The dataflow turns unpinned and come back to dataflow list following proper order criteria.

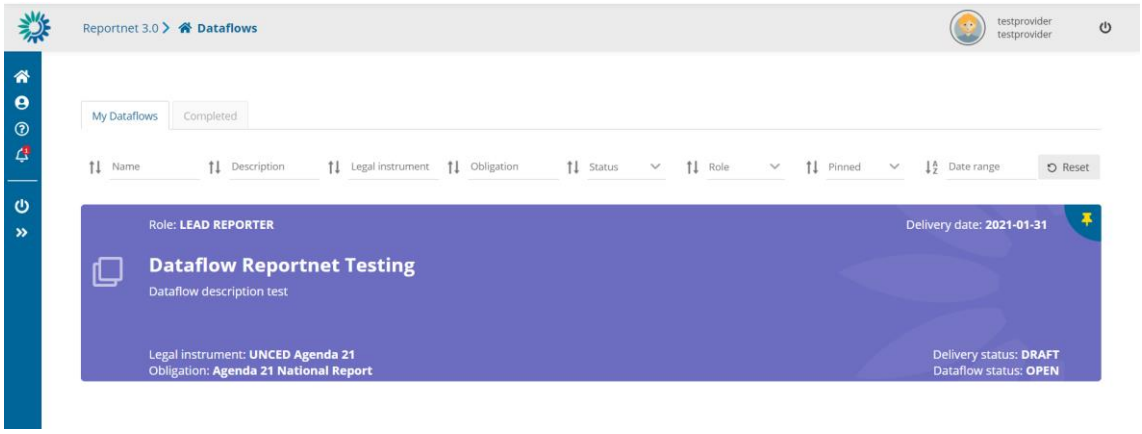


Figure 3 Pin a dataflow

3 Dataflow

3.1 Dataflow overview

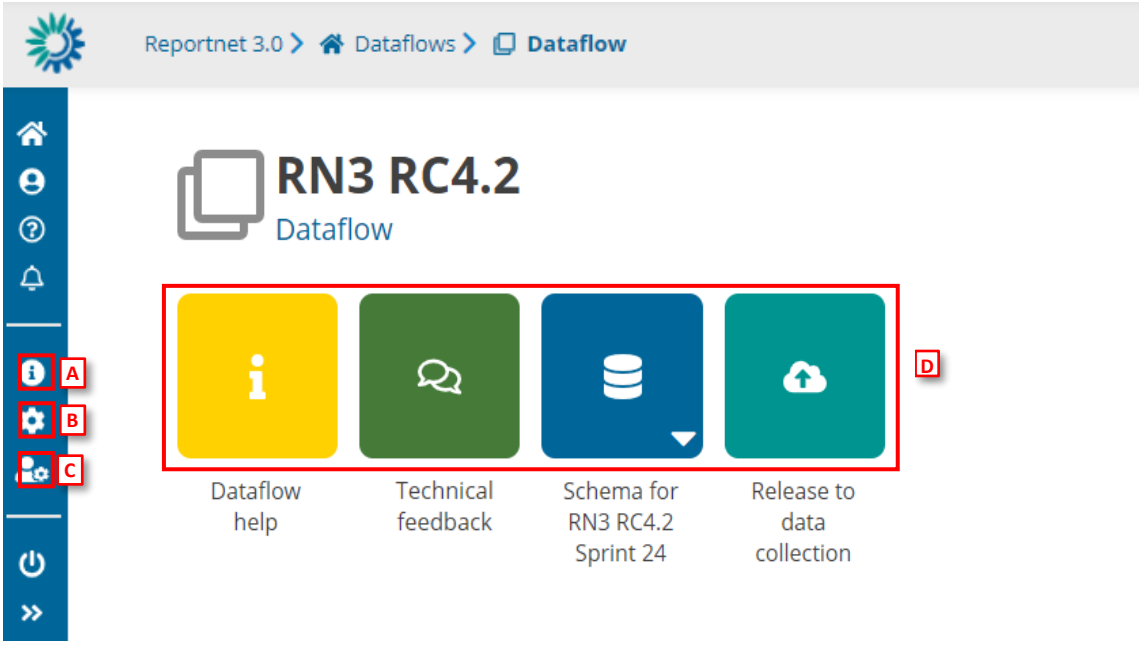


Figure 4 - Dataflow

- [A] – **Properties**, the icon marked with 'i', displays the information regarding the dataflow, reporting obligation and legal instrument (extracted from ROD).
- [B] – **API-key**, the cog button, displays a dialog showing the parameters which are needed to access the Reportnet 3 API (explained in section 3.1.7).
- [C] – **Manage reporters** displays a dialog where a lead reporter can provide access to the dataflow for other reporters (explained in section 3.1.1).
- [D] – The main part of the page are icons which take you to the components of the dataflow:
    - **Dataflow help** for accessing to the dataflow help page, in here you will find three tabs showing documents, links and technical overview of the reporting schema (explained in section 3.2).
    - '**Technical Feedback**' for communicating with Custodian and for receiving technical acceptance review (explained in section 3.1.5).
    - **Reporting data** is where the data in the excel spreadsheet is uploaded and validated. The user can also find Reference data, codelist and/or different dataset schemas where to report descriptive and spatial data.
    - **Release to data collection** for submitting your reported data once you have uploaded and validated it.

3.1.1 How to add reporters to my dataflow

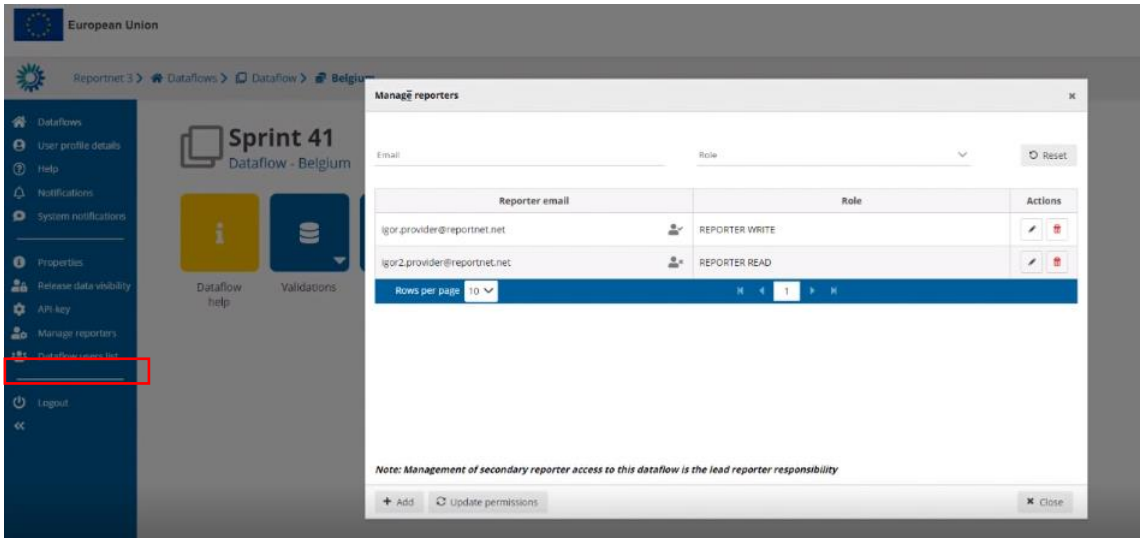


Figure 5 Manage reporters

1. Go to the dataflow page.
2. Click on the double arrow at bottom left to expand the left menu and click on the button **'Manage reporters'.**
3. A pop-up will appear where you can add reporters.
4. Add the reporter accounts. Under the account field, add the registered users email address and select an access level of **'read'** or **'read-write'**. Click on the dialogue away from the input fields.
    i. If the system cannot find the email as a registered user, then a red box will appear around the email address and an icon indicating the user is not valid. Moreover, you have a button "Update the permissions" to check if the user is or not created and has permissions.
    ii. If it is accepted, then you will be able to add another editor (the account field is automatically generated after a successful entry) and so on.
5. Note: 'read' can only see the dataflow schema through the 'Dataflow help' -> 'Dataset schemas' page.
6. Note: This added reporter see different things in the dataflow overview than Lead Reporter (e.g, Technical Feedback button).
7. Once you have added all your reporters click **'Close'.**

3.1.2 How to submit the data

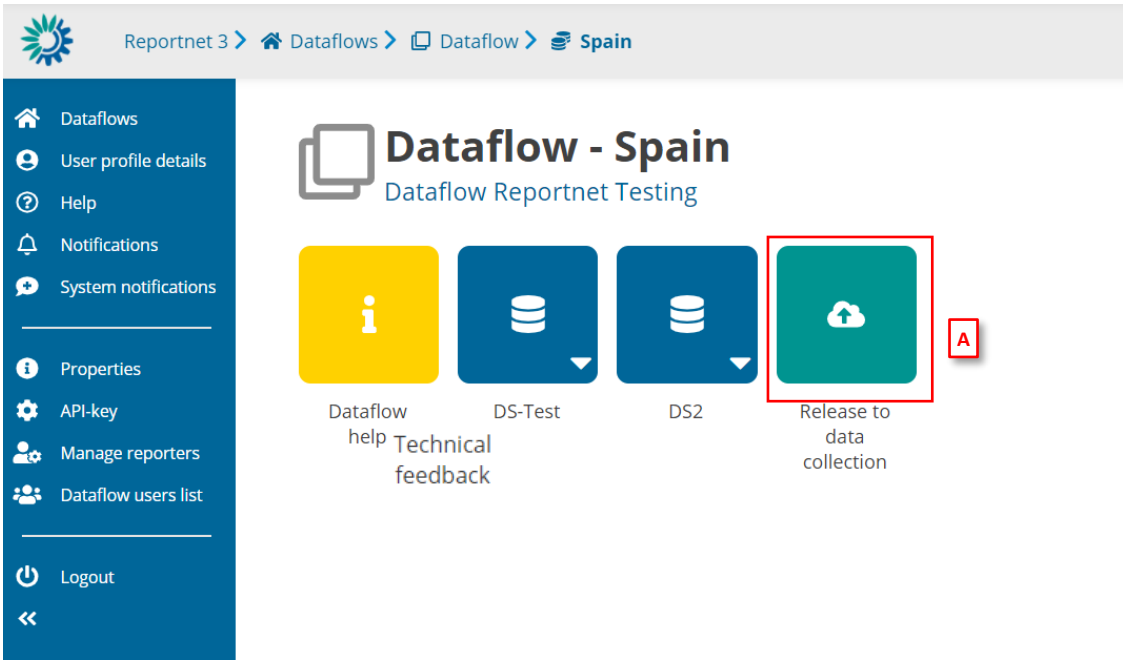


Figure 6 Submit data

1. Go to the Dataflow overview.
2. [A] – Click on **'Release to data collection'**.

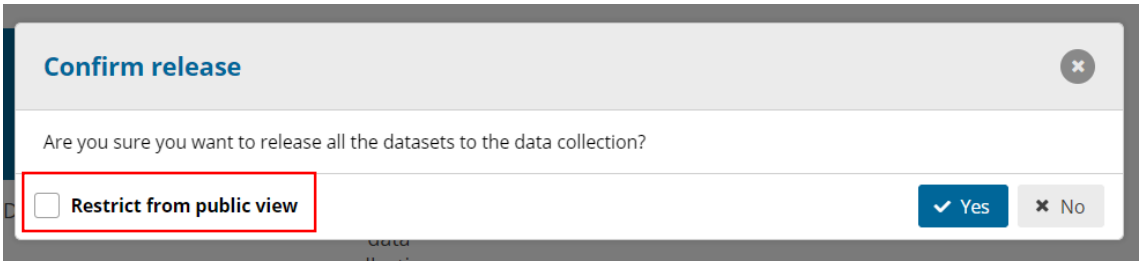
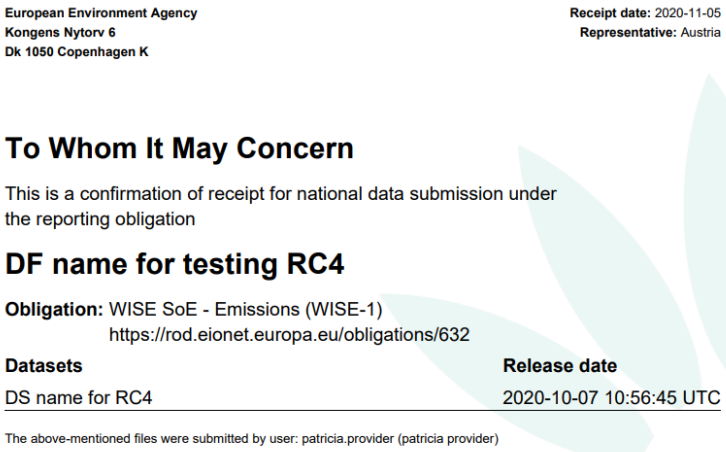


Figure 7 Restrict from public view

3. A confirmation dialogue appears with a checkbox **'Restrict from public view'** (default: false). This checkbox is only visible if custodian has previously set the datasets as **'Available at public view'** and **'Show public information'**. If checked, previous downloadable release will be deleted (if existed one).
4. The QC is run on each dataset and the 'Show validations' list refreshed in the background.
5. If there are blockers in any dataset, the release is stopped and there is a message to user to inform about that.
6. If the QCs run fine, a notification will appear saying the data is being validated and sent to the data collection. An automatic copy will be created.
7. Note: the user cannot release a copy they have made themselves. But the user can make copies for themselves as convenient restore points.
8. [B] – You will also see a new icon from which you can download a simple **'confirmation receipt'**. If you change the data and resubmit a new copy to the data collection, then a new confirmation receipt is available for download.



European Environment Agency
Kongens Nytorv 6
Dk 1050 Copenhagen K

Receipt date: 2020-11-05
Representative: Austria

To Whom It May Concern

This is a confirmation of receipt for national data submission under the reporting obligation

DF name for testing RC4

Obligation: WISE SoE - Emissions (WISE-1)
https://rod.eionet.europa.eu/obligations/632

Datasets	Release date
DS name for RC4	2020-10-07 10:56:45 UTC

The above-mentioned files were submitted by user: patricia.provider (patricia provider)

Figure 8 Confirmation Receipt

9. There is a possibility where reporter cannot submit data, and this is when requester has closed release process.

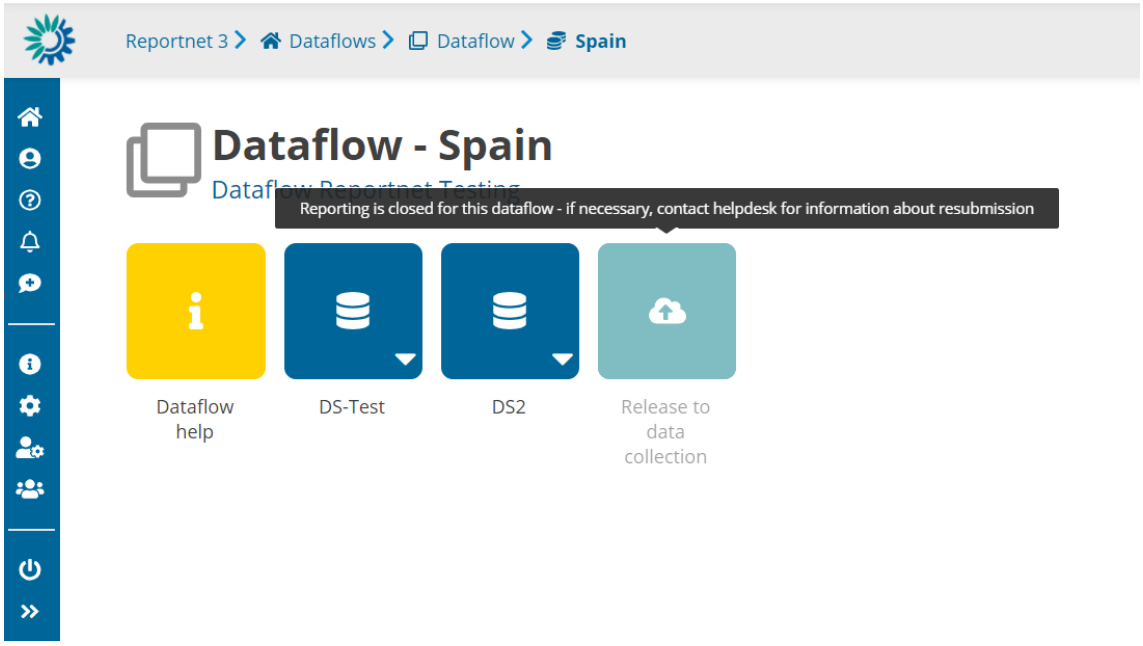


Figure 9 Dataflow closed for reporting

3.1.3 How to show/hide released data

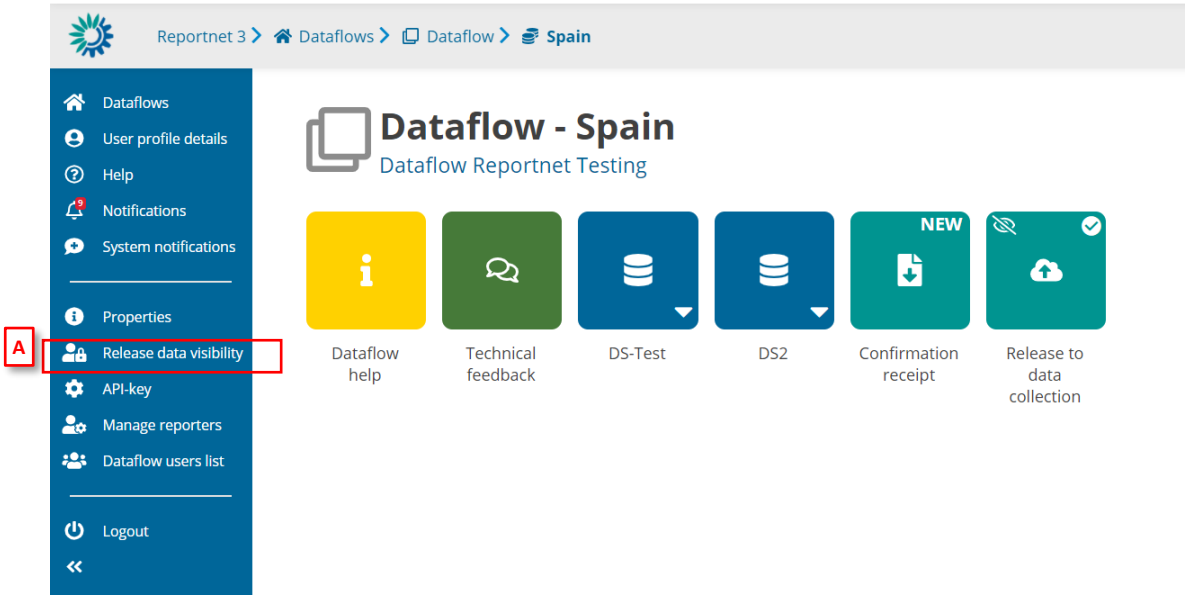


Figure 10 Release data visibility button

Once you have released the data, you can show or hide the released data.

1. Go to the Dataflow overview.
2. [A] – Click on **'Release data visibility'**. If you didn't check the option of as 'Restrict from public view' when you made the release data collection, you will see the modal with the option to change the visibility.

Figure 11 Restrict from public view

But if you marked the release data collection with the check 'Restrict from public view', the option is disabled. If you want to release the new data, you must release the data collection again.

Figure 12 Unrestrict from public view

3.1.4 How to consult Reported data publicly available

1. Lead reporter has previously released to data collection without selecting "**Restrict from public**" view option (see section 3.1.2)
2. Public user can choose in Reportnet3 Home page **View by Obligation** or **View by country** to see dataflow status and download reported data.

Figure 13 View public data

3. By selecting any of the available dataflows or countries, a summary table is displayed with release information, weblinks, documents, reference datasets, reporting datasets, a button to download the schemas information and ZIP files with reported data downloadable.

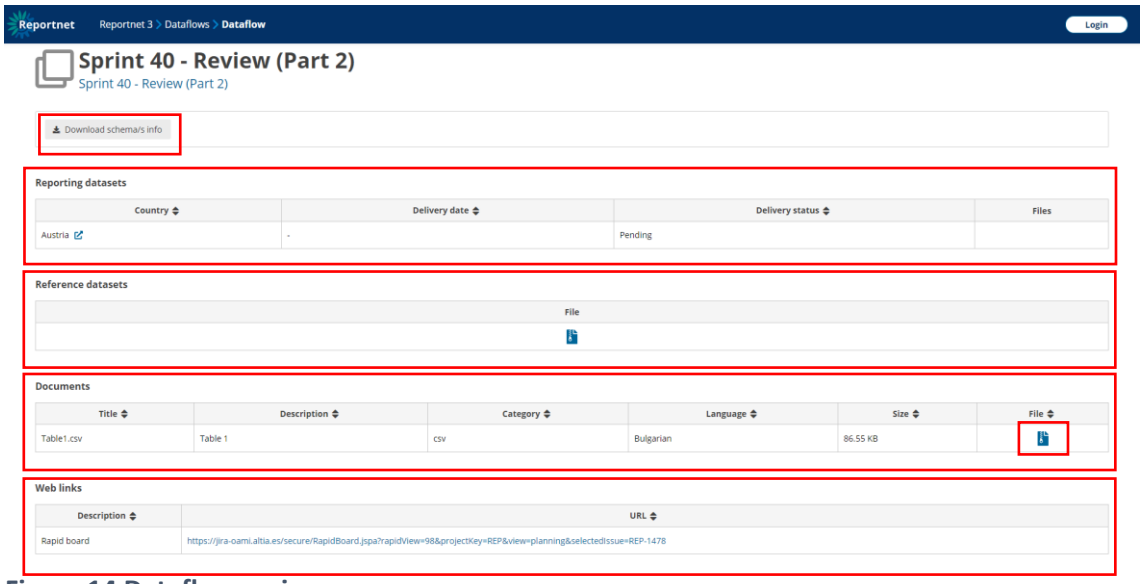


Figure 14 Dataflow review

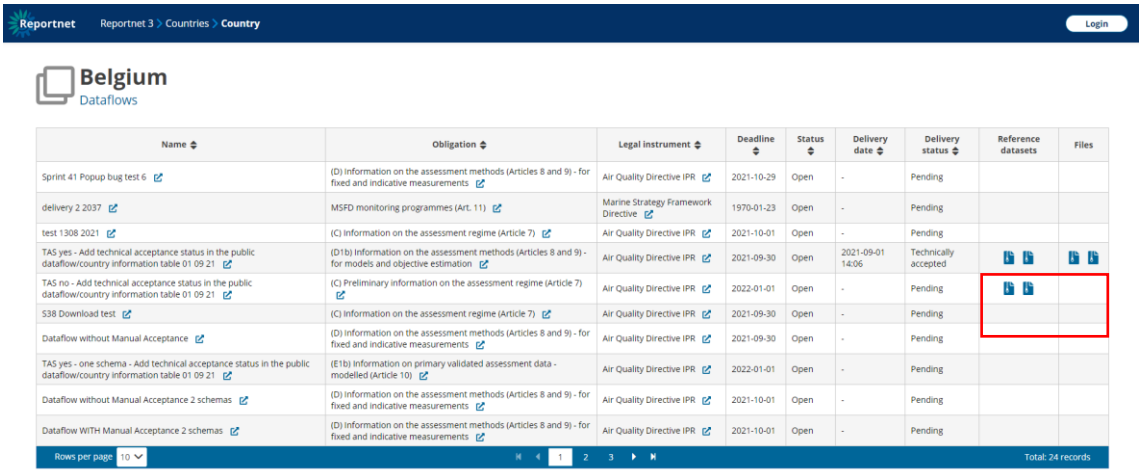


Figure 15 Public information

In the above figure, there is a box where is shown the **'Reference datasets'**. In some of the dataflows it might appear "Reference tables" and/or "Codelist tables" that have been defined by the data custodian.

The reference data is data that is there to check the validation of the data in QCs (Quality Checks). These tables are in RN3 before the member states report data. If the reference data is needed, the reporter will check that the data reported is correct in accordance with the reference data. So, the reporter will have to report data that use identifiers from previous reporting. These tables are read only so the reporter won't be able to change them. Usually, it will be included in the dataflow the last available data. The requesters will add in the description of the reference tables where the data came from and when the data was imported to keep all this information as metadata.

3.1.5 How to receive technical acceptance review

When a dataflow has been configured as "manual acceptance", its status appears as ´Pending´ (displayed in Reporting datasets status and status next to dataset name):

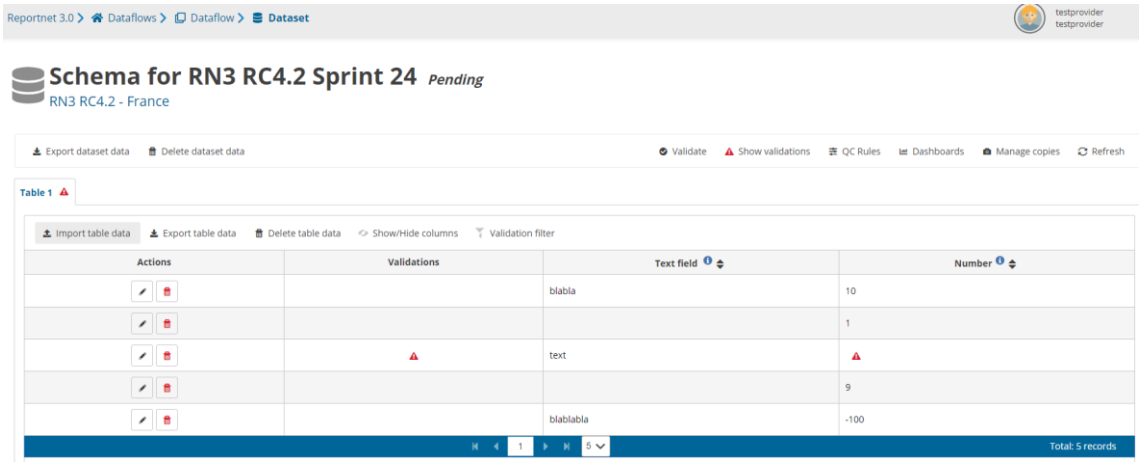


Figure 16 Manual Acceptance status

1. When the reporter releases data, the status is marked as '*Final feedback'.*
2. The custodian makes a review of the data released in the data collection and sends feedback.

3. It is possible to set the status to '*technically accepted*' or '*correction requested*'.
4. If '*correction requested*', the data stays in the data collection, feedback is received and status is updated.

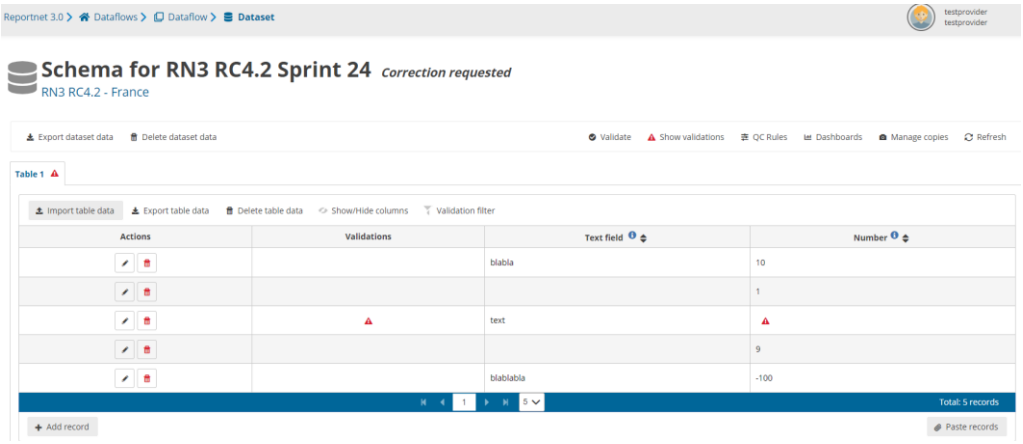


Figure 17 Correction Requested

Figure 18 Feedback received

5. If it's '*technical accepted*' then the version in the data collection is marked as such and status is updated.

3.1.6 How to submit an updated version of the data

1. It is possible to resubmit data to the data collection whilst the reporting is still open.
2. Go to the Dataflow overview.
3. Click on **'Release to data collection'**.
4. The QC is run on each dataset and the 'Show validations' list refreshed in the background.
5. If there are blockers in any dataset, the release is stopped and there is a message to user to inform about that.
6. If the QCs run fine, a notification will appear saying the data is being validated and sent to the data collection. A new automatic copy will be created.
7. You will also see the icon **'confirmation receipt'** is now updated from which you can download a new receipt reflecting the new delivery.

3.1.7 How to generate API-key

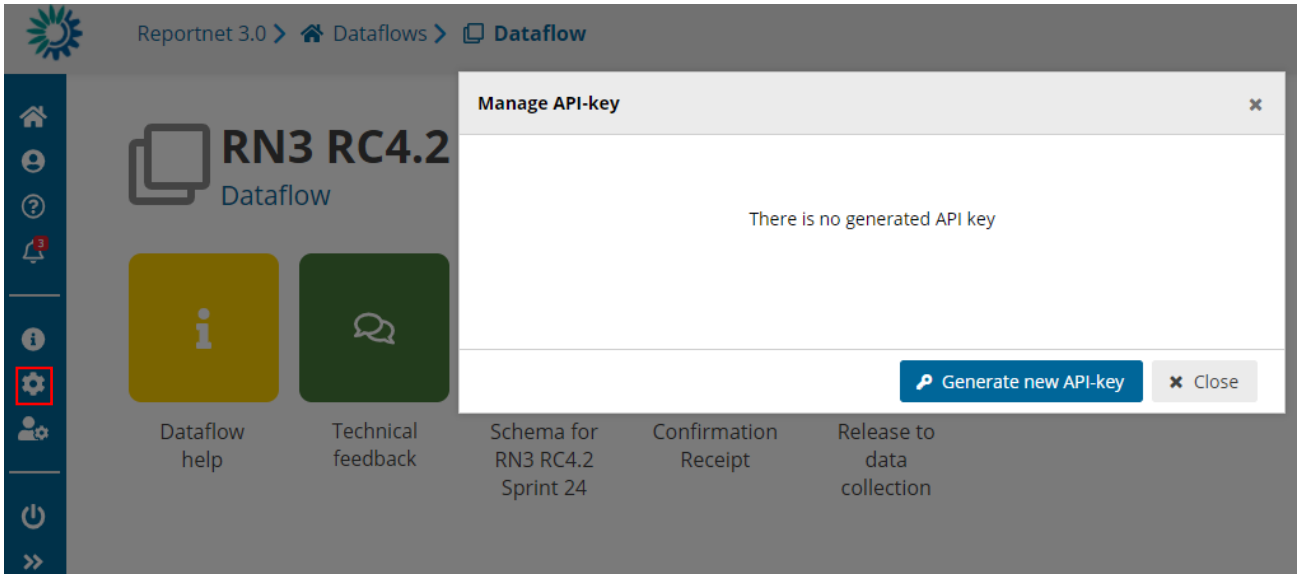


Figure 19 Manage API-key

1. Go to the dataflow page.
2. There will not be API generated if it is the first time for the user.
3. Click on '**Generate new API-key**'.

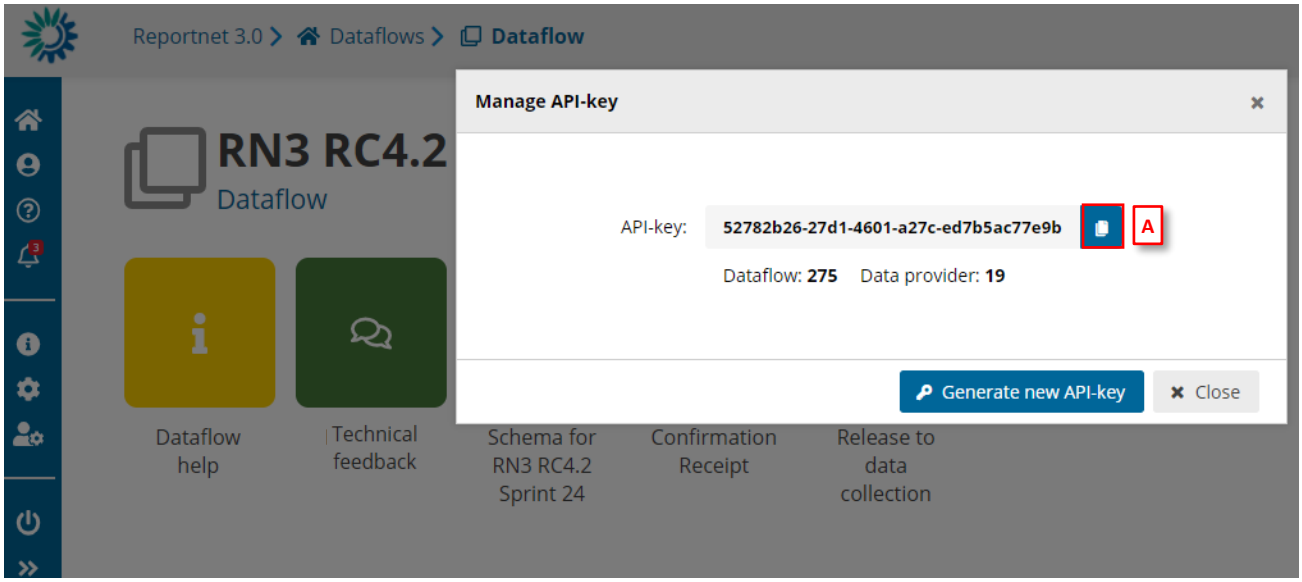


Figure 20 Generate API-key

4. Once the API-key is generated, it can be copied on clipboard using [A].
5. Different API-keys will be generated every time user clicks on 'Generate new API-key'.
6. API-key could be used as explained in 3.3.14.

3.1.8 How to consult Historic Releases

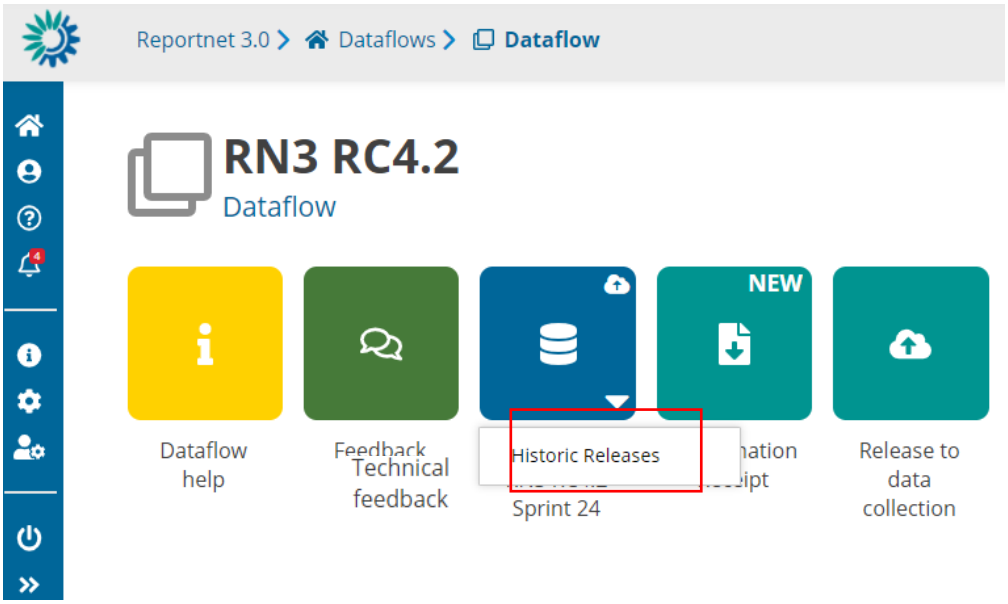


Figure 21 Historic Releases reporting DS

1. Once you have released one or more data to data collection, click on 'Historic Releases' button inside Reporting dataset context menu.
2. A new dialogue will appear with the release history for this dataset.

3.1.9 How to Communicate with Custodian

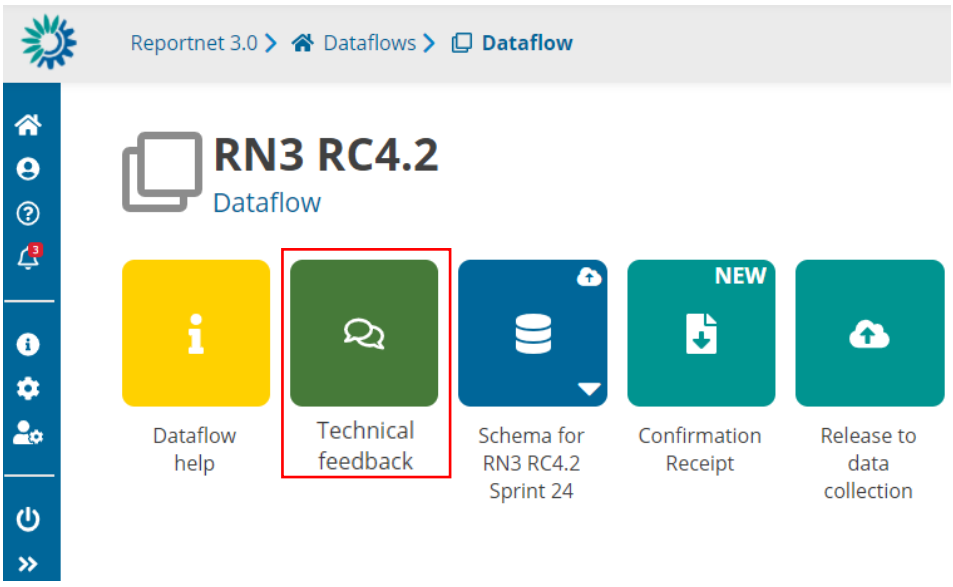


Figure 22 Feedback

1. There is a channel to communicate with Custodian at Dataflow level ('**Technical Feedback**' button).
2. User can see the messages (not read), get previous messages and the option to add new messages.

3. Note: Communication for technical acceptance review (see section 3.1.3) is also included in this Feedback section.

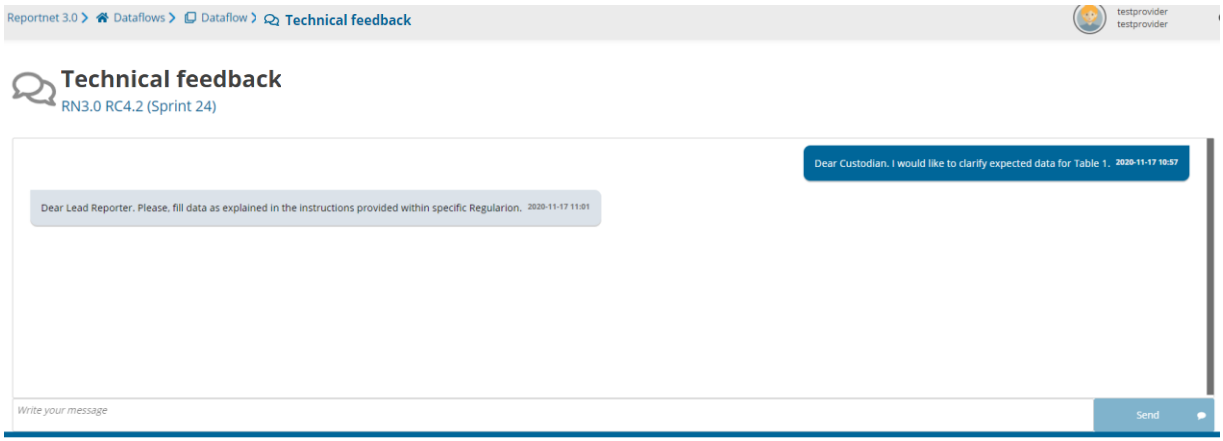


Figure 23 Feedback messages

3.1.10 How to check dataflow users list

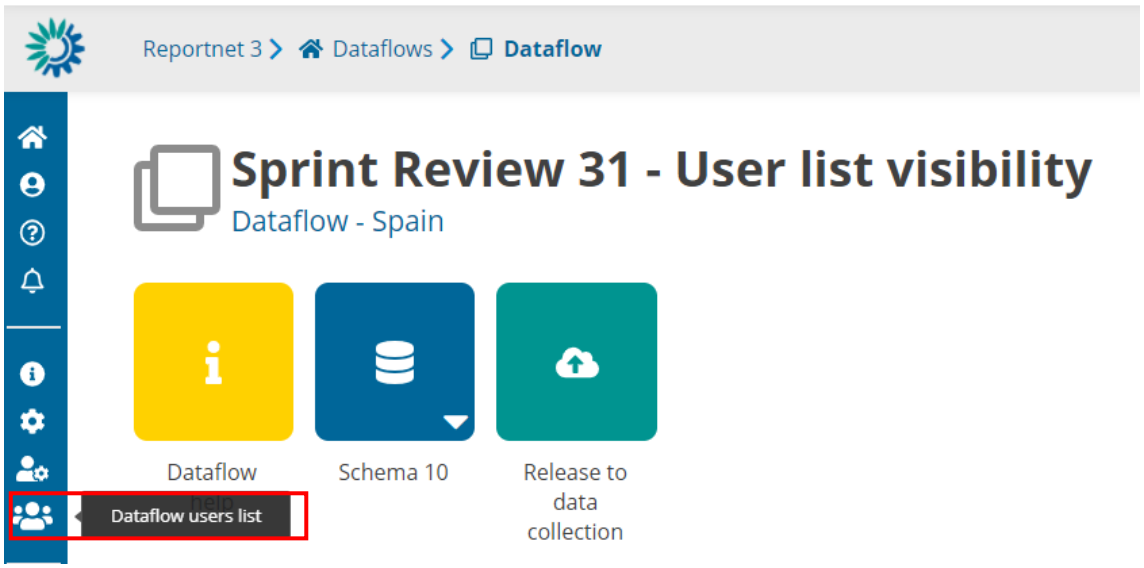


Figure 24 Dataflow users list

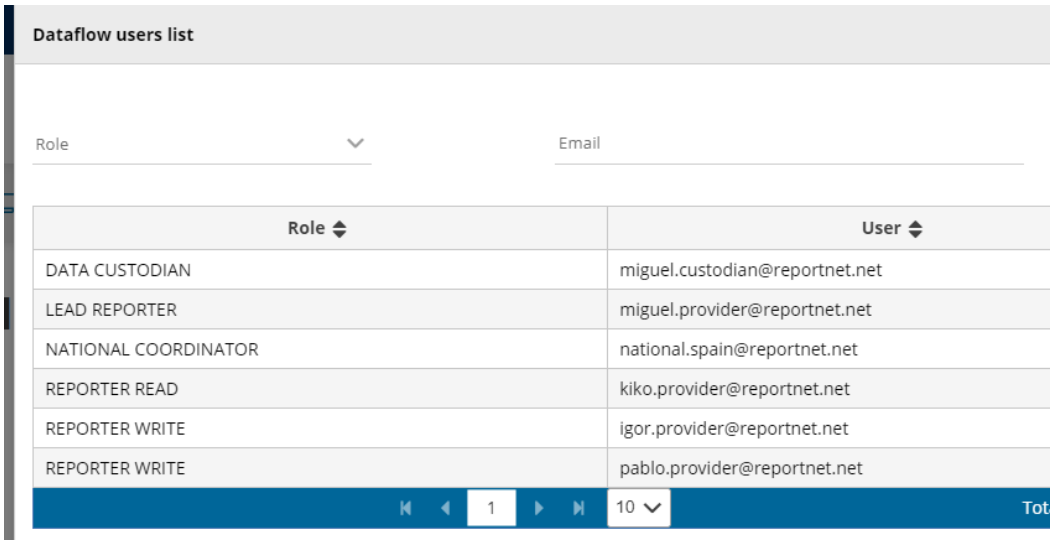


Figure 25 Dataflow users list Roles

1. From a dataflow inside a country selection (if applies, if there are not more than one country, directly in dataflow main page), the user can see all users assigned to this dataflow country by selection '**Dataflow users list**' in the left bar.
2. All roles, when applies, are displayed: Data Custodian, Lead Reporter, National Coordinator, Reported Read, Reporter Write, …

It is important to remember that only the users that appear on the list will be able to view the country information, so other lead reporters from other countries will only be able to see their corresponding country and not the information from other member states.

A user is only allowed to add users that have the same or lower privileges while for removing users, only the ones that have lower permissions.

3.2 Dataflow help

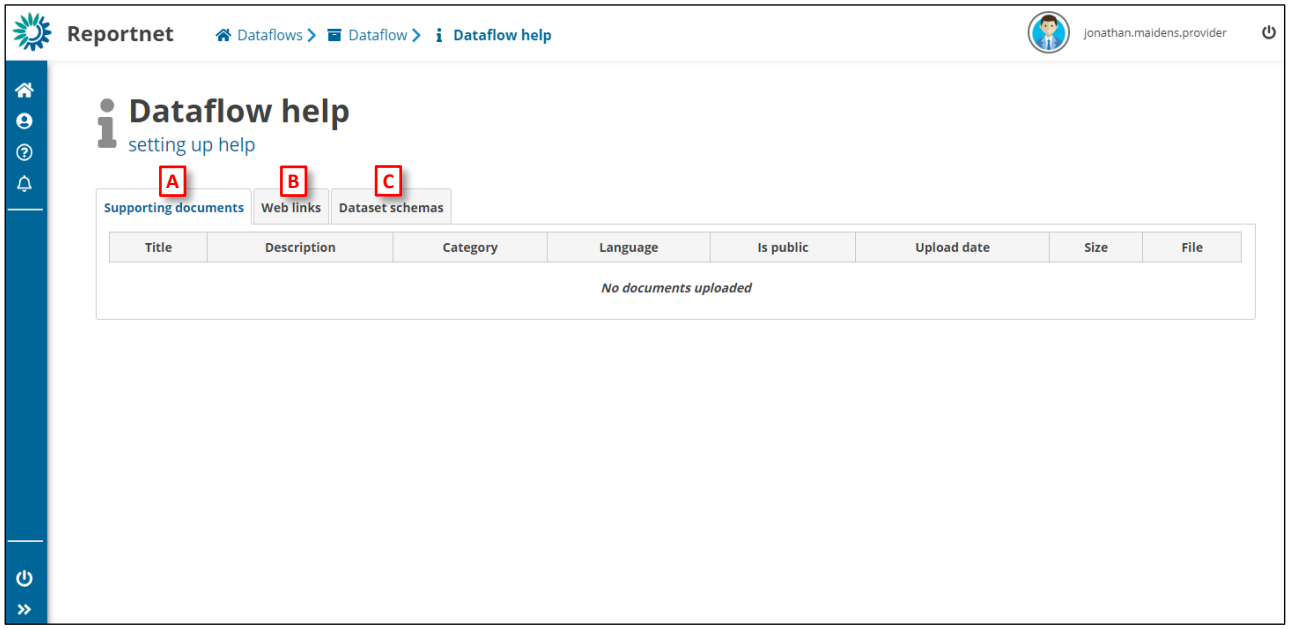


Figure 26 Dataflow help

- [A] – **'Supporting documents'** - Documents to support the data delivery for example reporting guidance or templates.
- [B] – **'Web links'** – links to external resources relevant to the reporting.
- [C] – **'Dataset schemas'** - Information on the dataset schema – Extension Operations, Uniques, Validations, table and field names and descriptions.

3.3 Dataset schema

A dataflow can have one or several datasets. In some cases, they can be divided into: spatial data and descriptive data.

Figure 27 - Reporting dataset

- [A] – The top menu bar provides various functions which operate on the whole dataset:
  - **Import dataset data** – Imports the whole dataset into the platform:
    - ZIP (.csv for each table): a ZIP file with CSV files inside, having one CSV per each table.
    - Custom file imports: the dataflows might have a custom process to import data using a template file that will be the file type or types that the requester or data custodian decides to have. This template will be held in **'Supporting documents'** of section 3.2 Dataflow support documents.

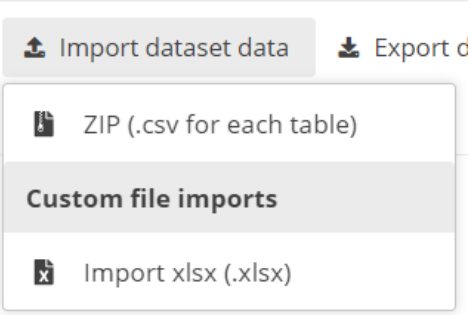


Figure 28 Import dataset data types

  - **Export dataset data** – Exports the whole dataset into a downloadable file:
    - (XLSX(.xlsx): normal export that gives the same info that appear in the tables that follow the template to import.
    - XLSX (.xlsx with validations): is an Excel file that after each column has a column with the same name but for validation. Example, if there is a column named "Name" there will be next to it another column named "Name validation". If this field is empty, it is because the field is correct after passing the QCs.
    - ZIP (XLSX + attachments): exports the dataset as a ZIP file that would contain the Excel file inside.
    - ZIP (CSV for each table): a ZIP file with CSV files inside, having one CSV per each table.

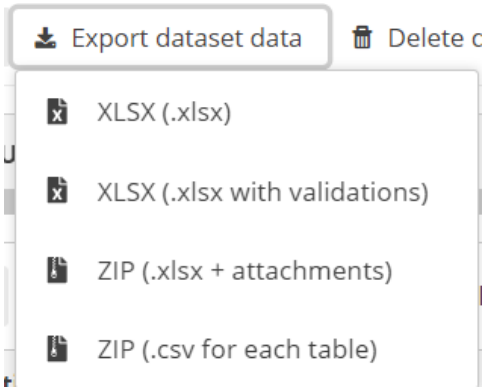


Figure 29 Export dataset data types

- **Delete dataset data** – Deletes all the data in the dataset.
- **Validate** – Runs validations for the whole dataset. There is no progress bar to know the percentage that has been validated. All said in section 2.1 Dataflow overview [F] Notifications part, applies here. The amount of data that has to be validated will make that the process could take minutes to finish. The user doesn't need to wait in front of the screen, they can leave and come back later to see if the validation has finished.
- **Show validations** – Shows a table of all the validation issues found across the whole dataset after a validation has been run.
- **QC rules** – shows a list of all the validations which have been created for the dataset.
- **Dashboards** – Provides a visualisation of the validation feedback.
- **Manage copies** – Functionality to save copies of the data (snapshots or restore points).
- **Refresh** – After import, validation and restore copy, you need to refresh the tables.

- [B] – This menu bar provides functionality applicable to the selected (visible) table:
  - **Import table data** – Import data into the table from an external file.
  - **Export table data** – Export data from the table into an external file. There are different ways of exporting:
    - CSV
    - CSV with filters: is a CSV with the filters that the user has selected in RN3 to select only the data that they would like to view
    - Excel file: the file will have only one tab with the name of the table and following the template structure.

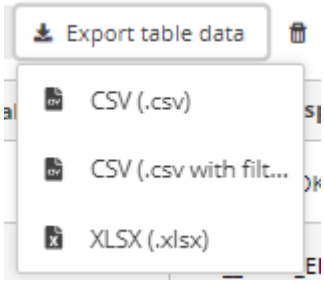


Figure 30 Export table data types

  - **Delete table data** – Deletes all the data in the selected table.
  - **Show/hide columns**.
  - **Validation filter** – Show/hide records based on validation results.

- [C] – Column heading – however the mouse over the 'i' icon to see a pop-up with the field type and description.
- [D] – Below the table are buttons to add single records or paste single or multiple records.
- [E] – Navigate back to the dataflow overview using the breadcrumb. The delivery of the data is triggered from the dataflow page.

For each of the ways of importing data into the platform it is important to understand properly the concept of incremental or partial reporting when the user selects ´**Replace data**' option.

ReportNet3 maintains the information of users that have already reported to facilitate the work if a partial or incremental report is required. If the user uploads only a subset of data and click on ´**Replace data**' then, the data that was before will be erased and will only leave the last subset of data uploaded. As an example, if a user has in a table 1000 rows and 100 of those have errors. If the user downloads the subset and correct afterwards and upload the data selecting ´**Replace data**', the user will end up with only those 200 rows.

In this table is shown how partial or incremental reporting is saved in RN3

Reporter	Imported Data	Replace data (Yes/No)	Content in RN3
R1	A	Yes/No	A
R2	B	No	A B
R3	C	No	A B C
R4	A	No	A B C A
R4	A B C	Yes	A B C
R5	D	Yes	D

Normally, the relationships between the tables are 1 to 1, but they can be 1 to many. Let's introduce the "Codelist" concept. If there is a list of chemical substances and the reporter has to include in a table some of those substances and that table column is defined as 1 to N, means that one record of the table is related to different chemical substances. In RN3, the 1 to N relationships with "Codelist" are included and it's just one record and one table column. For example, if the user has a table column in a table that says chemical substance and the reporter can choose between different chemical substances from the "Codelist" and all of them are included in that table column and they are separated by semicolon. So, imagine that the "Codelist" are 1, 2, 3, 4, 5 and so on, and then the content of that table column would be "1, 2, 3" meaning that the table column is related to three different chemical substances. That is one option for 1 to N relationships.

The other option is to have two different tables and the common relationship 1 to N between them. In both cases, there are QCs and if there is a 1 to N relationship, if you cannot duplicate the same record or if the 1 to N relationship must be reported, … For all that there is a QC control.

3.3.1 How to add records through the web interface

1. Add rows using the **'Add record'** button on the bottom left of the table.
2. In the dialog, tab between fields to enter data.
3. Enable the **'Add another record'** and the dialog will remain after **'Save'** is clicked for the adding of the next record.

3.3.2 How to edit records through the web interface

1. Either click directly on the field you wish to edit or click on the **'edit'** icon to the left of the record to see the pop-up.
2. Note: Changes should be reflected in the source data on your own system. You can export your dataset to your source system after these changes are finalised. Alternatively, correct the data in your source system, delete the table dataset data and then reimport.
3. Note: Descriptive data can contain documents and references to documents that can't be imported because it must be done manually

3.3.3 How to import records to a table from a CSV file

1. Export the empty dataset schema using the **'export table data'** button and selecting 'CSV'.
2. Use this template to create a CSV file in the right format to import your data. Note: the field separator ',' used for CSV files.
3. Use the **'import table data'** to bring the data back into the table via the CSV file.
4. Note: Rows will be appended to the current table except when ´**Replace data**' check is selected.
5. The dataset will be automatically validated after import.
6. Note: the name of the CSV will have to be the same as the name of the table that is going to be imported data to.

3.3.4 How to import records to all tables from a custom template file

1. The requester will have distributed the custom template which can be used to deliver the data. This could be in, for example, XLSX, XML or SQLite file types. Populate the template according to the provided instructions. This template will be held in **'Supporting documents'** of section 3.2 Dataflow support documents. While in the previous case in section the import will only import data for one table, this case will do it for all the tables at the same time if the user saves data for all of them in the template.
2. Click on the **'Import dataset data'** button and select the file.
3. The application which automatically know from the file type that a custom transformation is being used.
4. Rows will be appended to the current table except when ´**Replace data**' check is selected.

3.3.5 How to load data from a previous reporting

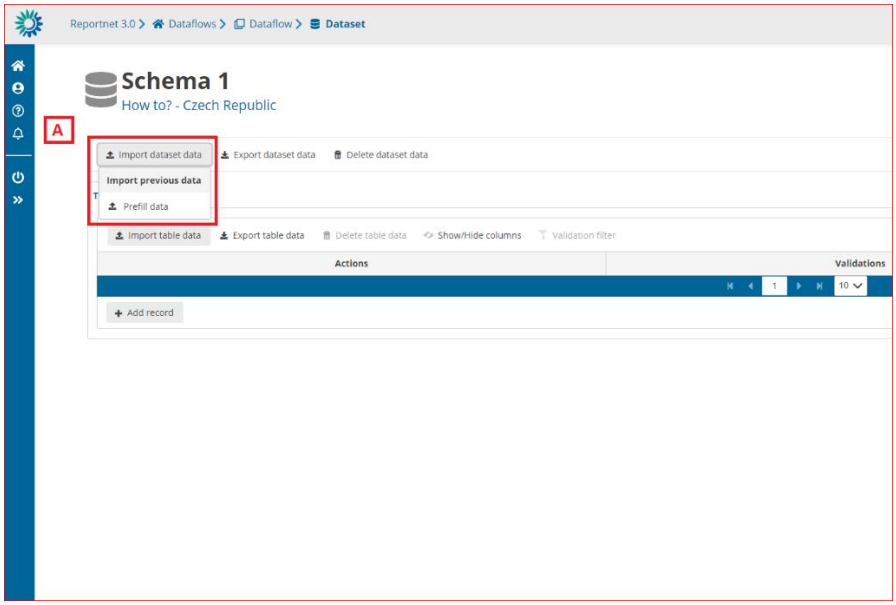


Figure 31 Import previous data

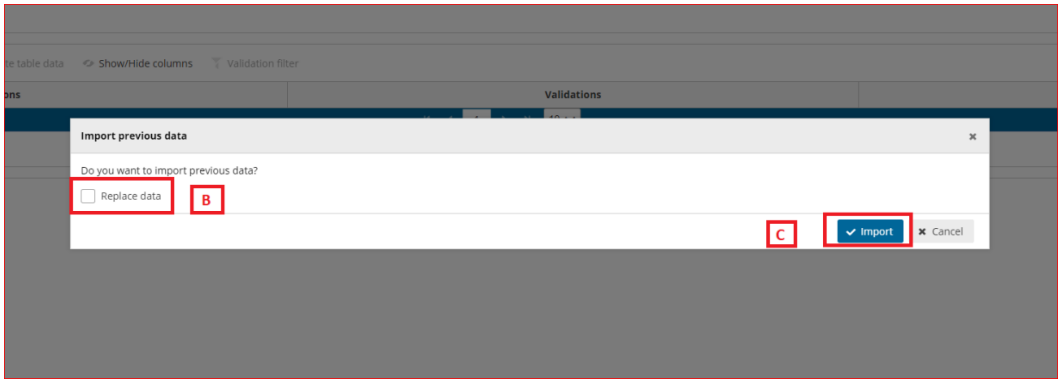


Figure 32 Replace data

- [A] – The **'Import dataset data'** will show a dropdown with different tools to import data depending on the dataflow schema configuration. The one below 'Import previous data' is the option to click to load data from previous reporting.
- [B] – If we mark the **'Replace data'** option, all data will be replaced with the imported data of the process.
    - If not, the data will be added as appended following existing data.
- [C] – Confirm the action with the '**Import**' button.
- After import the validation will be automatically run.
- Notifications in the top right will inform you the import has started and when the validation has finished
- Once the validation is finished the 'Refresh' button will be highlighted and after clicking you will see the results of the validation.

In some projects there will be prefilling of the data for previous reporting periods. There is no need for the member states to migrate or change formats of previous reporting because this will be done automatically.

3.3.6 How to filter table data

To filter table data, insert in an input text in the table bar **'Filter value'** [A] the text you want to search in all fields.

The geometer fields will be omitted, and the filter is case sensitive.

Figure 33 Filter table data

3.3.7 How to load data for a Point field

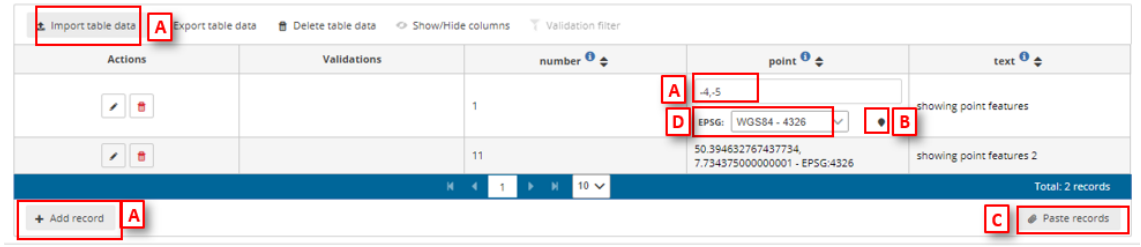


Figure 34 Point data

1. Data can be introduced by:
    i. [A] – Typing directly in box, importing or with ´Add record´.
    ii. [B] – Selecting point in the map.

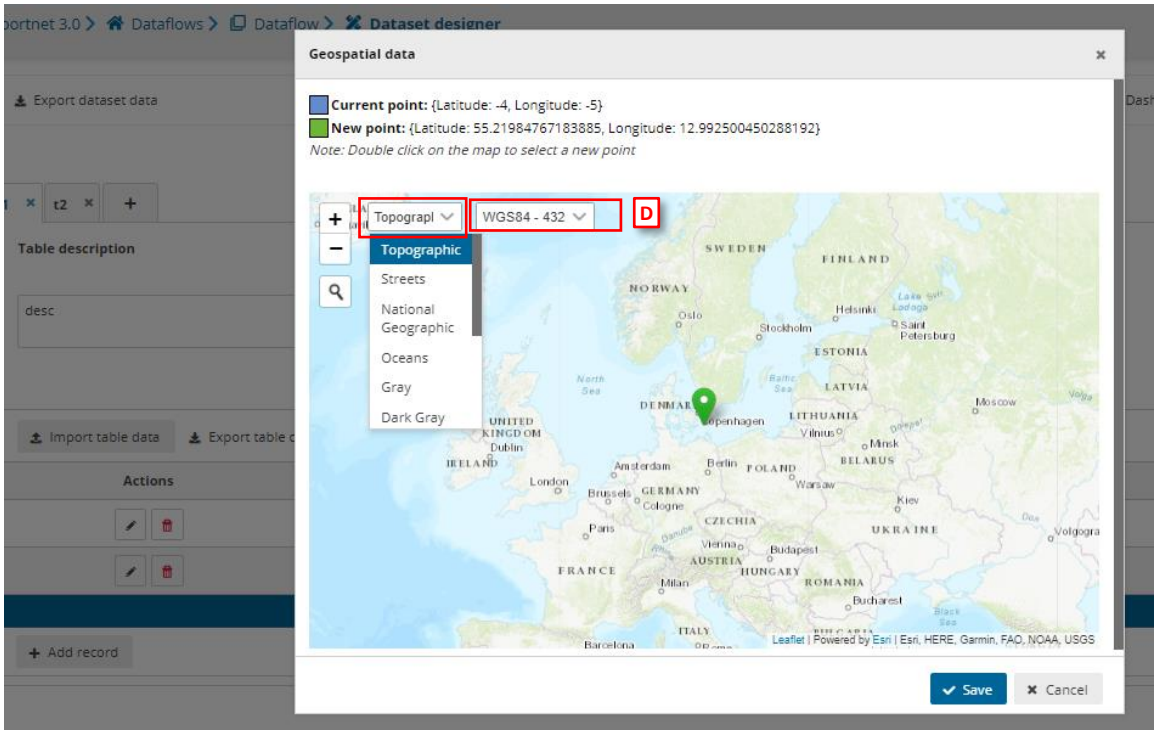


Figure 35 Point in the map

    iii. [C] – Pasting records.
2. [D] – Different spatial reference and basemap layer can be chosen.

For any other spatial data there won't be any visualization tool to be able to preview that spatial transformations have worked correctly.

3.3.8 How to load data for other Spatial fields

Fields type *Line, Polygon, Multiple points, Multiple lines and Multiple polygons* should be added through "**Import table data**" functionality.

The format to report the spatial data is GeoJSON and it can be included in CSV, SQLite or geopackage files. Remember that the reporter will only be able to use the type of files that the requester or data custodian specifies for the dataflow.

3.3.9 How to see the list of QC checks

1. In the top menu click on **'QC rules'** to see which rules have been defined for the dataset.
    i. It is possible to download the list of QCs in a CSV file by clicking on the **'Download QCs'** button.

3.3.10 How to validate the data manually

1. Click on **'Validate'.**
2. A notification in the top right will indicate the validation has started and when it has been completed.
3. **'Refresh'** the table once the validations are complete.
4. Errors are displayed at four types – the field; record; table; and dataset.
5. Field level errors have icons next to value in the field. Hover over it to see the error message.
6. The column *'Validations'* shows for each record which level of errors at field and record level.
7. Click on **'Show validations'** button (dataset menu) to view the list of all errors in the dataset. These errors are displayed in a summary table, grouped by a particular error type. This table has four columns:
    - Entity – One of FIELD/RECORD/TABLE/DATASET.
    - Table – the table with the error.
    - Field – the type of field affected with the error.
    - Code – the error code.
    - Validation level:
        - BLOCKER: Blocker messages indicate that the detected error will prevent data submission (data release is not possible).
        - ERROR: Error messages indicate issues that clearly need corrective action by the data reporter.
        - WARNING: Warning messages indicate issues that may be an error. Data reporters are expected to double-check relevant records.
        - INFO: Informative message. Neutral or statistical feedback about the delivery, e.g. number of species reported.
    - Error message – What the issue is.

- Number of records – Number of records grouped.

8. Page through it and sort it to understand errors in data. It is also possible to filter records in the validation table to make it easier to work with.
9. You can filter on the error messages either by the error level or the entity type.
10. Click on an error in the list to go to the record in the table and it will be highlighted. When clicking on a grouping, it filters the main table with all those records that triggered the error.
11. Click on button **'Download validations'** if you want to download the validation information grouped by a particular error type.
12. Click on **'Dashboards'** to get a visual overview of the number of errors in the data.
13. Correct the errors and revalidate the data.
14. Only BLOCKERS will stop the data from being released to the data collection.

To make clearer how to deal with the correction of the errors in the data these would be the steps:

1. Import data as explained in sections 3.3.3 and 3.3.4 and click on **'Refresh'** button.
2. Click on **'Validate'** button and after the process finishes click on **'Refresh'** button.
3. Check if there are errors and/or blockers.
4. Click on **'Export dataset data'** and download the excel file with validations.
5. Open the excel file, check where there are errors and correct them. You can see an explanation in the validation column after the column with error.

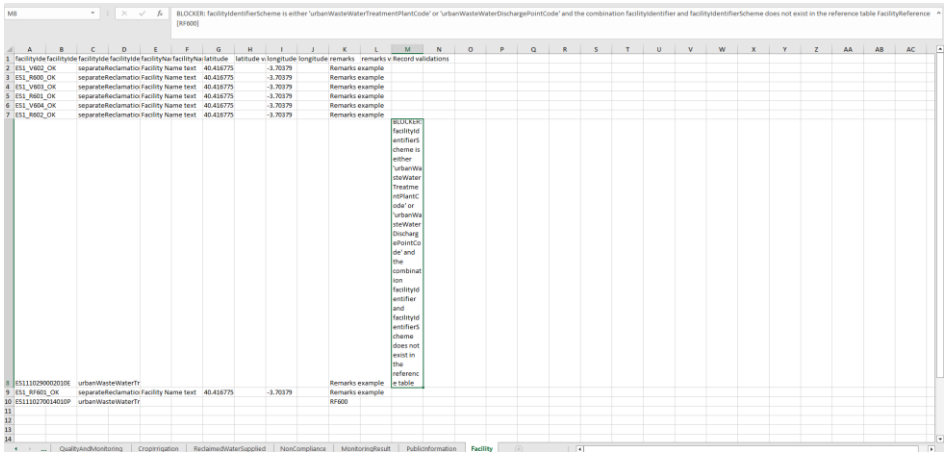


Figure 36 Excel file with validation

6. The user can change the rows with errors and upload again the file.
7. Remember to select the **'Replace data'** checkbox. As you can see, although there are extra columns that are not in the template, but only the columns that appear in the template will be uploaded and updated.

3.3.11 How to delete a row

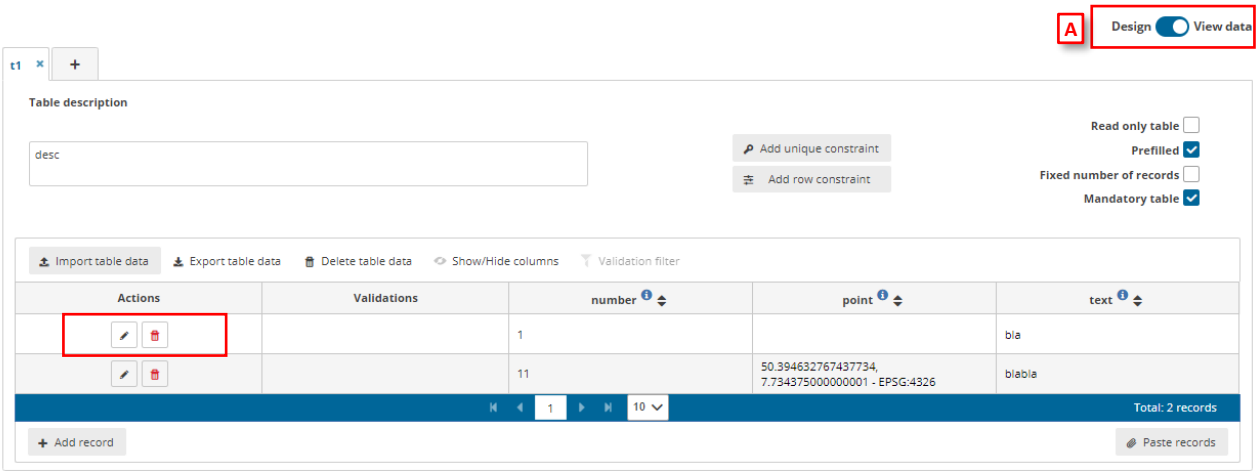


Figure 37 Action buttons to edit and delete

1. [A] Click on View data.
2. Click on the red trash-can icon in the first column.
3. You will be prompted to confirm the deletion – click 'yes' to confirm.
4. Note: All associated QC checks both automatic and manually added are also deleted.

3.3.12 How to save a copy of the dataset

1. On the table menu bar, click on **'Manage copies'.**
2. In the dialogue, give your copy a description in the text field at the top and press the **'+'** button.
3. Click **'Yes'** to confirm in the popup.
4. The copy will now be listed on the right.
5. Note: the user cannot release a copy they have made themselves. But the user can make copies for themselves as convenient restore points.
6. Close the right panel and continue working.

3.3.13 How to restore a copy of the dataset

1. On the table menu bar, click on **'Manage copies'.**
2. In the list, press the **'Restore copy'** button next to the copy you wish to revert to (WARNING: the current data will be overwritten – consider taking a copy of the current dataset before reverting to an older one).
3. Confirm in the dialogue you wish to continue.
4. Wait for the green notification to appear in the top right, confirming the copy has been successfully restored.
5. Close the right panel.
6. Click on the **'Refresh'** button.

3.3.14 How to fill a Webform

Documentation regarding Webforms can be found in a separate HowTo document.