

Sites Inventory Submission

California Department of
Housing and Community Development



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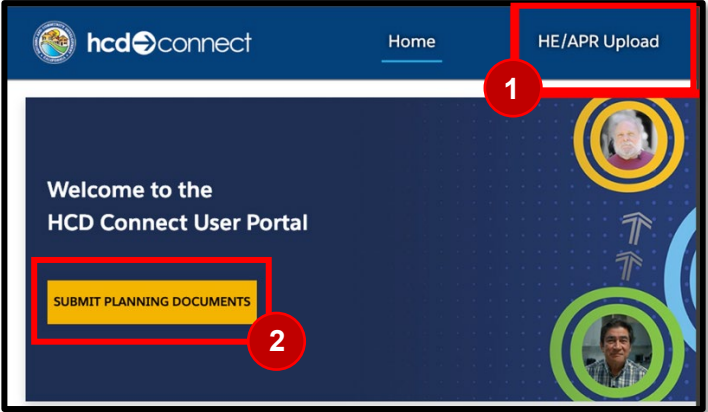
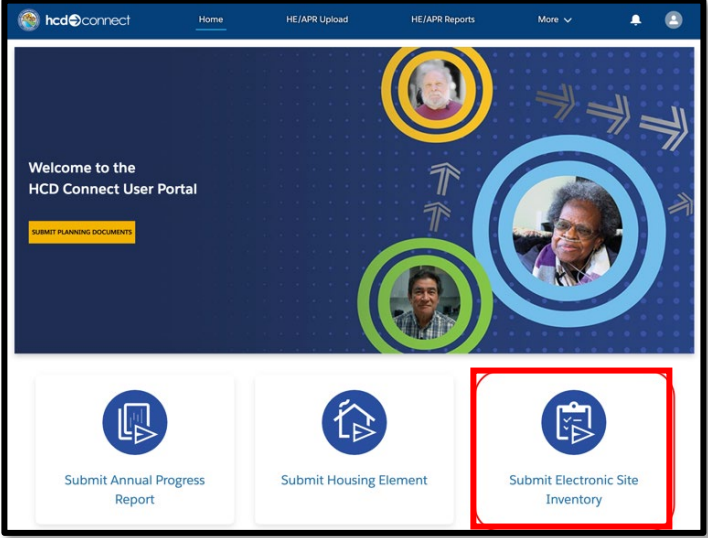
Learning Objectives

At the end of this module, the learner will be able to:

- Navigate the HCD Connect User Portal
- Understand where to upload Sites Inventory from the Portal
- View previous submissions
- Resolve Sites Inventory error files if the system has identified errors
- Re-submit Sites Inventory files if an error is received

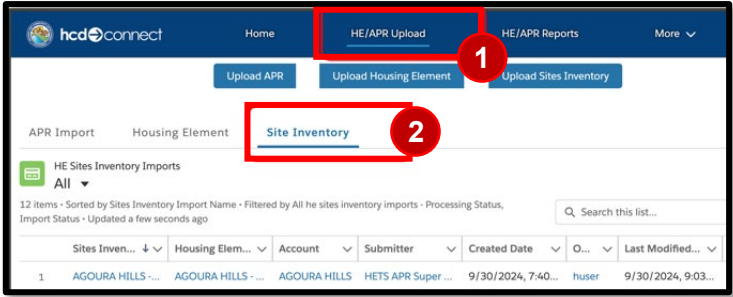
HCD Connect Home Page

After you have created a user account and have successfully logged into the HCD Connect User Portal, you will see the home page. To submit your electronic site inventory files, you will need to access the HE/APR Upload tab. There are several ways to navigate to this tab, as described below.

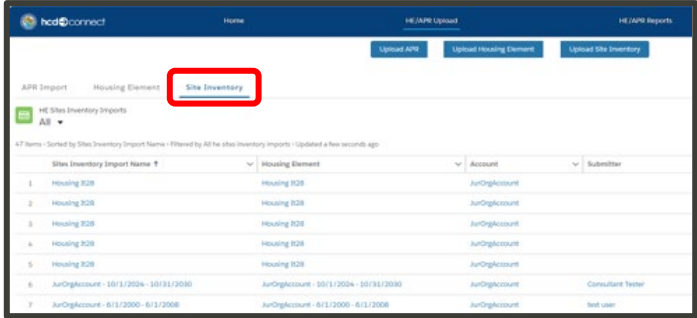
Steps	Screenshot Examples
1. Click on the HE/APR Upload tab from the navigation bar at the top of the page.	
2. Click on the Submit Planning Documents button.	
3. Click on the Submit Electronic Sites Inventory tile from the home page tile menu.	

HE/APR Upload Tab

HE/APR Upload tab is the main page where you will be able to manage all submissions of Annual Progress Reports, Housing Elements and electronic Sites Inventory files. When you click on the tabs (APR Import, Housing Element, Site Inventory), you will be able to view your previous submissions.

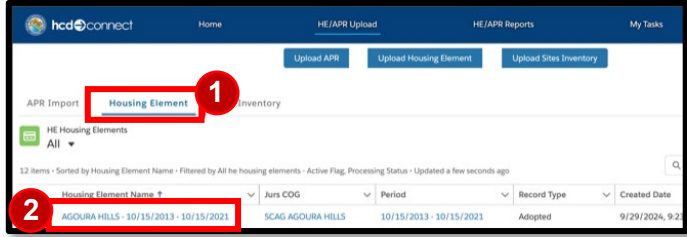
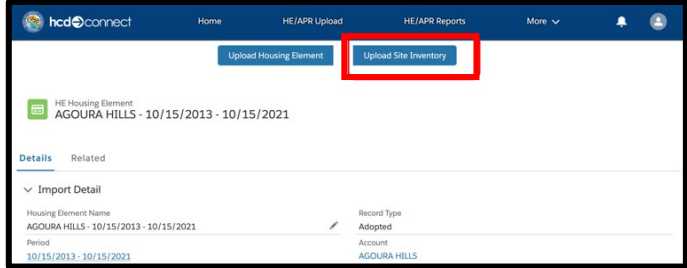
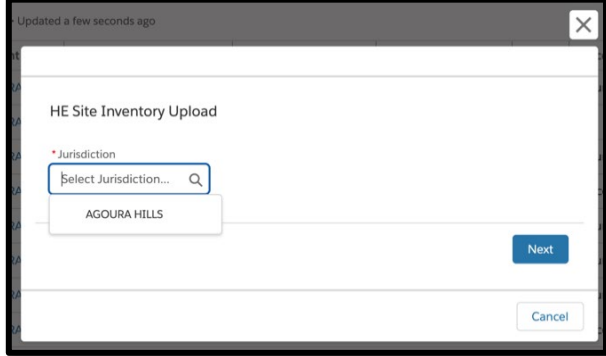
Steps	Screenshot Examples
1. After logging into the User Portal, navigate to the HE/APR Upload tab.	
2. Click on the Sites Inventory tab.	

View Previous Submissions: Sites Inventory List View

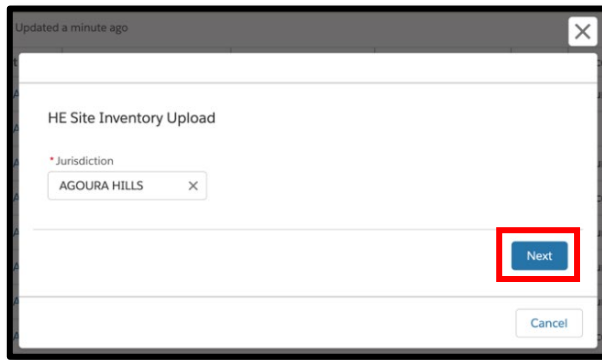
Steps	Screenshot Examples																																
<p>1. Click on any of the hyperlinks under HE Sites Inventory Import column to open a previous submission of a Sites Inventory record.</p>	 <p>The screenshot shows the hcdconnect web application interface. At the top, there are navigation links for 'Home', 'HE APP Upload', and 'HE APP Imports'. Below these are buttons for 'Upload APP', 'Upload Housing Element', and 'Upload Site Inventory'. The main content area is titled 'HE Sites Inventory Imports' and shows a list of 17 items. A red box highlights the 'Site Inventory' link in the 'HE Sites Inventory Imports' column. The table below shows the following data:</p> <table border="1"><thead><tr><th>Sites Inventory Import Name</th><th>Housing Element</th><th>Account</th><th>Submitter</th></tr></thead><tbody><tr><td>1 Housing B2R</td><td>Housing B2R</td><td>JurDigiAccount</td><td></td></tr><tr><td>2 Housing B2R</td><td>Housing B2R</td><td>JurDigiAccount</td><td></td></tr><tr><td>3 Housing B2R</td><td>Housing B2R</td><td>JurDigiAccount</td><td></td></tr><tr><td>4 Housing B2R</td><td>Housing B2R</td><td>JurDigiAccount</td><td></td></tr><tr><td>5 Housing B2R</td><td>Housing B2R</td><td>JurDigiAccount</td><td></td></tr><tr><td>6 JurDigiAccount - 10/1/2004 - 10/31/2008</td><td>JurDigiAccount - 10/1/2004 - 10/31/2008</td><td>JurDigiAccount</td><td>Consultant Tester</td></tr><tr><td>7 JurDigiAccount - 6/1/2000 - 6/1/2008</td><td>JurDigiAccount - 6/1/2000 - 6/1/2008</td><td>JurDigiAccount</td><td>test user</td></tr></tbody></table>	Sites Inventory Import Name	Housing Element	Account	Submitter	1 Housing B2R	Housing B2R	JurDigiAccount		2 Housing B2R	Housing B2R	JurDigiAccount		3 Housing B2R	Housing B2R	JurDigiAccount		4 Housing B2R	Housing B2R	JurDigiAccount		5 Housing B2R	Housing B2R	JurDigiAccount		6 JurDigiAccount - 10/1/2004 - 10/31/2008	JurDigiAccount - 10/1/2004 - 10/31/2008	JurDigiAccount	Consultant Tester	7 JurDigiAccount - 6/1/2000 - 6/1/2008	JurDigiAccount - 6/1/2000 - 6/1/2008	JurDigiAccount	test user
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7 JurDigiAccount - 6/1/2000 - 6/1/2008	JurDigiAccount - 6/1/2000 - 6/1/2008	JurDigiAccount	test user																														
<p>2. Use the search bar to search for a previous submission.</p>																																	

Note: A list view displays items in a vertical format, allowing you to quickly see and scroll through information. You can select between the All or Recently Viewed list view.

How To Upload Sites Inventory File

Steps	Screenshot Examples										
<p>1. On the HE/APR Upload page, click on the Housing Element tab to open the list of housing elements submitted.</p>	 <p>hcdconnect Home HE/APR Upload HE/APR Reports My Tasks</p> <p>Upload APR Upload Housing Element Upload Sites Inventory</p> <p>APR Import: Housing Element Inventory</p> <p>HE Housing Elements All</p> <p>12 Items - Sorted by Housing Element Name - Filtered by All he housing elements - Active Flag, Processing Status - Updated a few seconds ago</p> <table border="1"><thead><tr><th>Housing Element Name *</th><th>Jurs CDG</th><th>Period</th><th>Record Type</th><th>Created Date</th></tr></thead><tbody><tr><td>AGOURA HILLS - 10/15/2013 - 10/15/2021</td><td>SCAG AGOURA HILLS</td><td>10/15/2013 - 10/15/2021</td><td>Adopted</td><td>9/29/2024, 9:2</td></tr></tbody></table>	Housing Element Name *	Jurs CDG	Period	Record Type	Created Date	AGOURA HILLS - 10/15/2013 - 10/15/2021	SCAG AGOURA HILLS	10/15/2013 - 10/15/2021	Adopted	9/29/2024, 9:2
Housing Element Name *	Jurs CDG	Period	Record Type	Created Date							
AGOURA HILLS - 10/15/2013 - 10/15/2021	SCAG AGOURA HILLS	10/15/2013 - 10/15/2021	Adopted	9/29/2024, 9:2							
<p>2. Open the Housing Element you are submitting a Sites Inventory to by clicking on the blue hyperlink under Housing Element Name.</p>											
<p>3. On the Housing Element page, click the Upload Site Inventory button.</p>	 <p>hcdconnect Home HE/APR Upload HE/APR Reports More</p> <p>Upload Housing Element Upload Site Inventory</p> <p>HE Housing Element AGOURA HILLS - 10/15/2013 - 10/15/2021</p> <p>Details Related</p> <p>Import Detail</p> <table border="1"><tbody><tr><td>Housing Element Name</td><td>Record Type</td></tr><tr><td>AGOURA HILLS - 10/15/2013 - 10/15/2021</td><td>Adopted</td></tr><tr><td>Period</td><td>Account</td></tr><tr><td>10/15/2013 - 10/15/2021</td><td>AGOURA HILLS</td></tr></tbody></table>	Housing Element Name	Record Type	AGOURA HILLS - 10/15/2013 - 10/15/2021	Adopted	Period	Account	10/15/2013 - 10/15/2021	AGOURA HILLS		
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AGOURA HILLS - 10/15/2013 - 10/15/2021	Adopted										
Period	Account										
10/15/2013 - 10/15/2021	AGOURA HILLS										
<p>4. Sites Inventory Upload component will appear to begin the upload process.</p>	 <p>Updated a few seconds ago</p> <p>HE Site Inventory Upload</p> <p>* Jurisdiction</p> <p>Select Jurisdiction...</p> <p>AGOURA HILLS</p> <p>Next</p> <p>Cancel</p>										

5. Select the appropriate **Jurisdiction** to upload a Sites Inventory to and click **Next**.



Updated a minute ago

HE Site Inventory Upload

* Jurisdiction

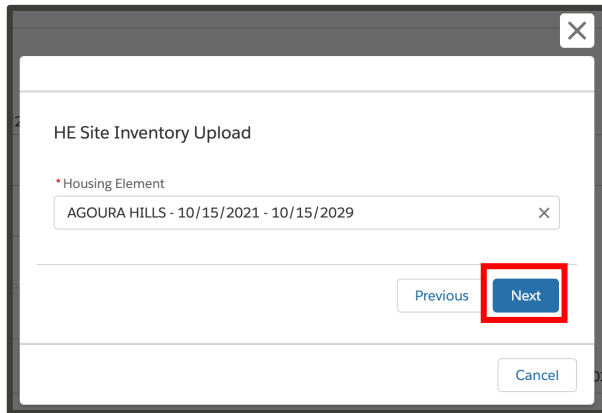
AGOURA HILLS x

Next

Cancel

6. If a consultant is associated with multiple jurisdictions, the consultant will choose between a list of associated jurisdictions.

7. Select the appropriate Housing Element record with the correct Planning Period for the jurisdiction and click **Next**.



HE Site Inventory Upload

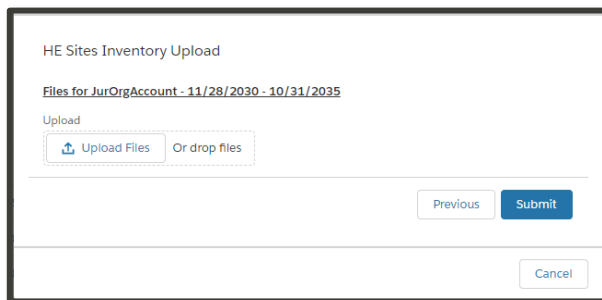
* Housing Element

AGOURA HILLS - 10/15/2021 - 10/15/2029 x

Previous Next

Cancel

8. Click on **Upload Files**. Select the file you want to upload from your computer.



HE Sites Inventory Upload

[Files for JurOrgAccount - 11/28/2030 - 10/31/2035](#)

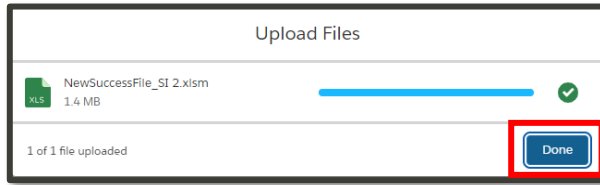
Upload

Upload Files Or drop files

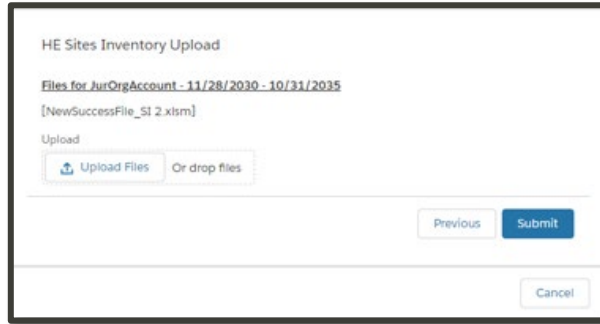
Previous Submit

Cancel

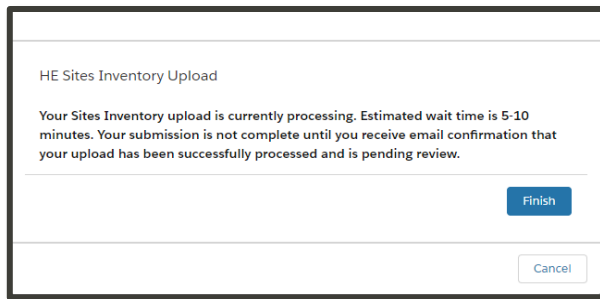
9. Once selected and uploaded, click on **Done**.



10. Click on **Submit**.

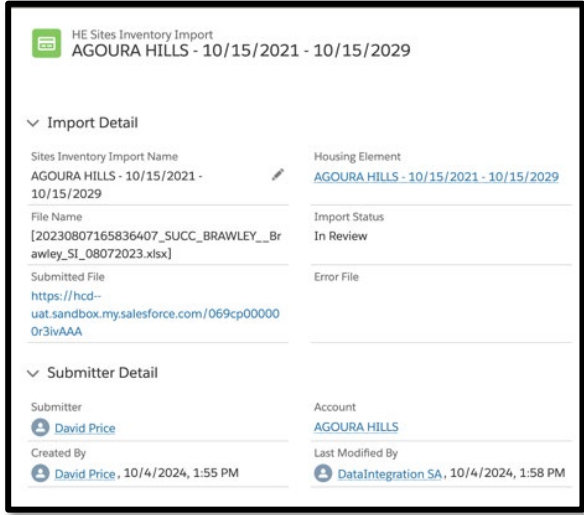


11. You will receive a notification that the Sites Inventory files are processing. It takes up to 10 minutes for the system to process the file.. Click on **Finish**.



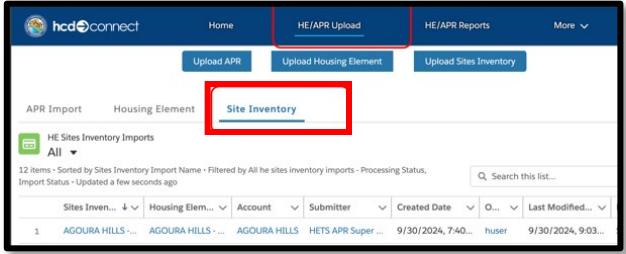
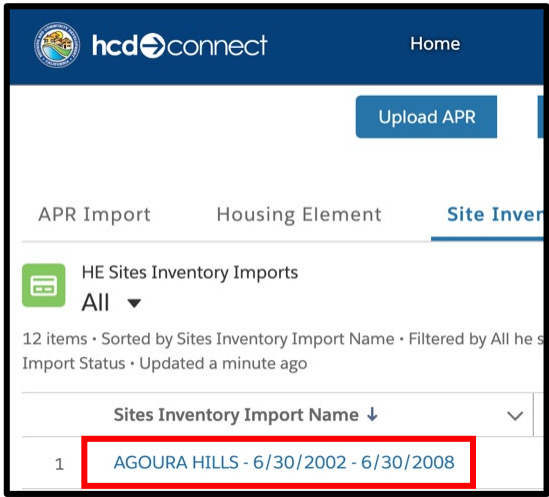
Note: Explore the Housing Element Site Inventory Guidebook designed to assist a jurisdiction through the Site Inventory analysis required by the Housing Element Law.

Sites Inventory Import Record Page

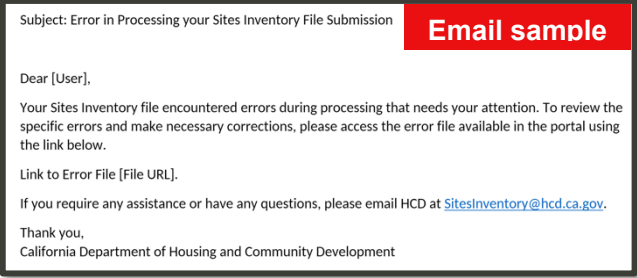
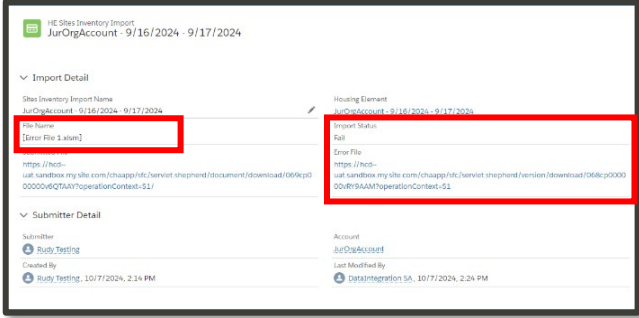
Steps	Screenshot Examples
<p>1. You will be redirected to the HE Sites Inventory Import record page where you can see the details of the uploaded file.</p>	
<p>2. On the page, you will find the following informational fields:</p> <ul style="list-style-type: none">• Sites Inventory Import Name: Name of the import (system will update this automatically).• File Name: Name of the file you uploaded.• Submitted File: This is a link to the file that you uploaded. You can download the file directly by clicking this link.• Housing Element: link to the related Housing Element.• Import Status: displays the status of the import. You will see the following options: In Review, Success, Fail.• Error File: If there is an error in the submission, an error file will appear. Click on the link to download the file that showcases where all the errors occurred.	 <p>The screenshot displays the 'HE Sites Inventory Import' record page for 'AGOURA HILLS - 10/15/2021 - 10/15/2029'. It is divided into two main sections: 'Import Detail' and 'Submitter Detail'.</p> <p>Import Detail:</p> <ul style="list-style-type: none">Sites Inventory Import Name: AGOURA HILLS - 10/15/2021 - 10/15/2029Housing Element: AGOURA HILLS - 10/15/2021 - 10/15/2029File Name: [20230807165836407_SUCC_BRAWLEY__Brawley_SI_08072023.xlsx]Import Status: In ReviewSubmitted File: https://hcd-uat.sandbox.my.salesforce.com/069cp000000r3ivAAAError File: (Link is present but content is empty) <p>Submitter Detail:</p> <ul style="list-style-type: none">Submitter: David PriceAccount: AGOURA HILLSCreated By: David Price, 10/4/2024, 1:55 PMLast Modified By: DataIntegration SA, 10/4/2024, 1:58 PM

View Previous Submissions

The uploaded Sites Inventory file is now available under the Sites Inventory Imports List View. To access the HE Sites Inventory Imports List View:

Steps	Screenshot Examples
<p>1. From the HE/APR Upload page on the navigation bar, click on the Sites Inventory tab.</p>	
<p>2. View the previous submissions displayed in the list view.</p>	
<p>3. Within the HE Sites Inventory Imports List View, you'll be able to see all Sites Inventory submissions.</p>	
<p>4. Click on the hyperlink under Sites Inventory Import Name to view a previous submission.</p>	

Resolving Sites Inventory Error Files

Steps	Screenshot Examples
<p>1. Once you have submitted the Sites Inventory file, the file will be processed.</p>	
<p>2. If there is an error in the file, you will receive an email notification that will prompt you to navigate to the Sites Inventory Import record and view the Sites Inventory Error file.</p>	

Note: On the Sites Inventory Import record, you will see that the Import Status is reporting Fail and there is a URL link in the Error File that can be open and downloaded.

Resubmitting Updated Sites Inventory Files

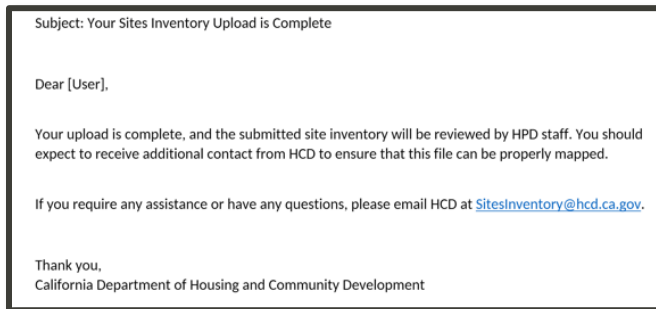
Steps

1. After you fix the error(s) in the file, you can resubmit the updated Sites Inventory file by following the same upload process outlined previously. .
2. Error files are deleted in the system when the file has been successfully uploaded.

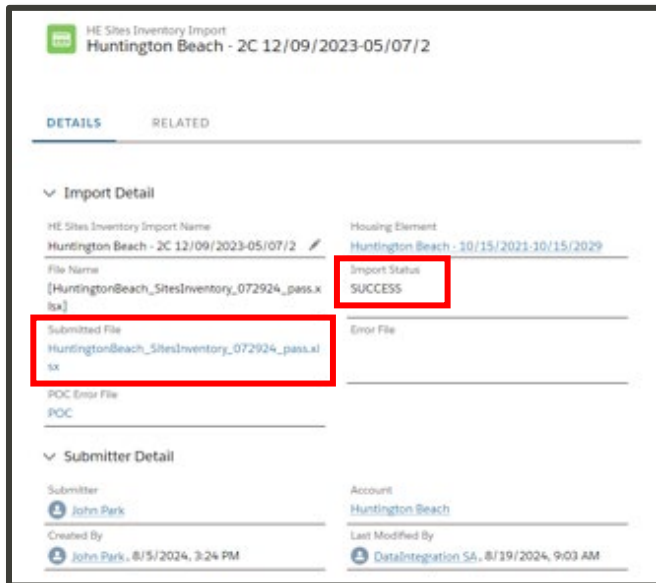
Note: The process of resubmitting a Sites Inventory file can continue until the file is successful.

Confirmation of a Successful Sites Inventory Submission

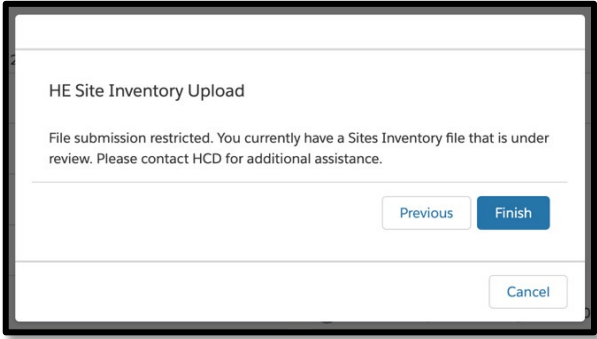
Once you have submitted or re-submitted the Sites Inventory file, the file will be processed. Once the file is processed and the validation passes, you will receive an email notification that the file was processed successfully.



Note: You can also navigate to the Sites Inventory Import record and see that the Import Status field reads Success. Submitted files can be downloaded using the URL in the Submitted File field.



Sites Inventory Review

Steps	Screenshot Examples
<p>1. After your Sites Inventory file has been successfully processed by the system, HCD staff will begin their review.</p> <p>HCD Staff will reach out to you directly if there are any issues with your file that needed to be addressed.</p>	
<p>2. If you try to upload a new Sites Inventory file while your previous submission is under review, you will receive the following error, "File submission is restricted. You currently have a Sites Inventory file that is under review. Please contact HCD for additional assistance."</p>	 A screenshot of a web application error message. The title is "HE Site Inventory Upload". The message text reads: "File submission restricted. You currently have a Sites Inventory file that is under review. Please contact HCD for additional assistance." Below the text are three buttons: "Previous" (light blue), "Finish" (dark blue), and "Cancel" (light blue).
<p>3. Contact HCD for assistance if required.</p>	