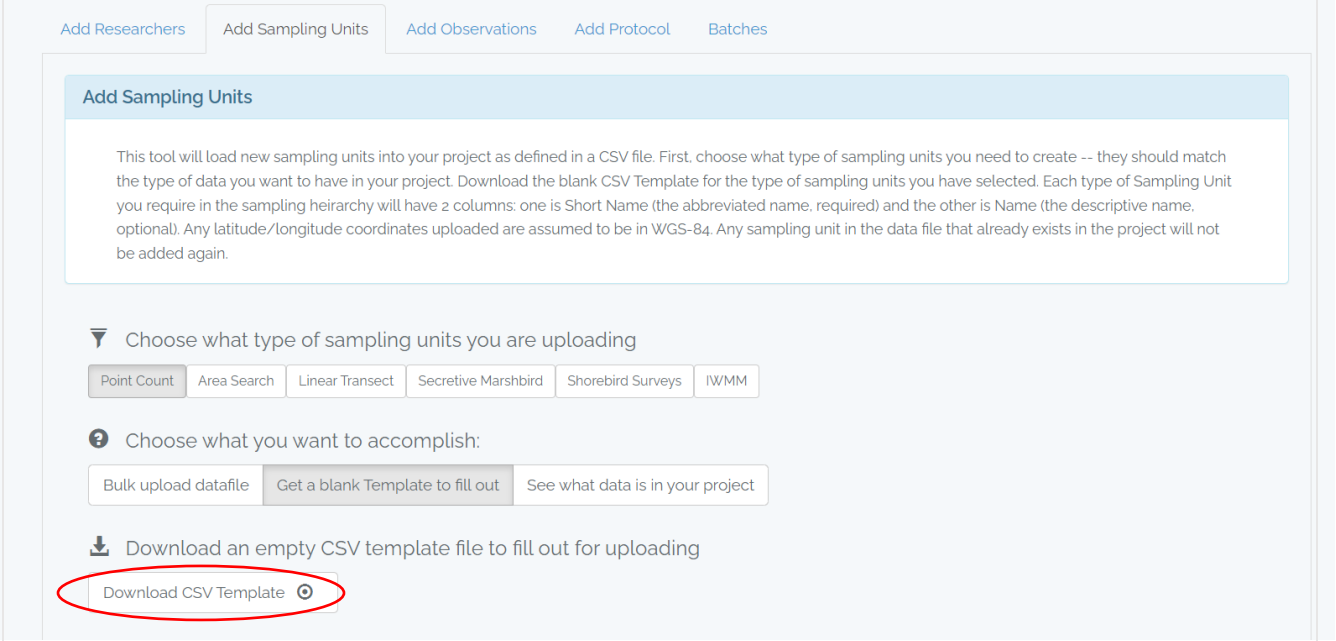
Exercise 3: Bulk Load Sampling Units

Purpose: This exercise gives you an introduction to the Bulk Uploader tool. In Exercise 1, you used the Sampling Unit Manager tool to create Sampling Units (a transect with one associated point). In this exercise, we will demonstrate how to create multiple sampling units at once for a given survey type (Point Count, Area Search, etc) in a spreadsheet and use the Bulk Uploader tool to upload them to the AKN. In this exercise, we are going to **1) bulk load a new point onto your existing transect**, and **2) add a new transect with three new points**.

Steps:

1. Navigate to the **Bulk Uploader** application and log in if needed. (You can find a link to the Bulk Uploader application under "Manage Data" tab on the DoW AKN Portal at www.dodakn.org).
2. In the dropdown box, select the project: **DOD_DEMO**
3. Click on "**Add Sampling Units**" in the tabs below the project.
4. Click on "**Point Count"** in the choice of sampling unit types.
5. Click on "**Get a blank template to fill out"** under *Choose what you want to accomplish*.
6. Click on the "**Download CSV Template**" button and you will get a CSV file downloaded to your computer. If you are unable to download the file due to your computer settings, reach out to an instructor who can help you manually create a template.



7. Using **Excel** or other spreadsheet program of your choice, open the CSV template file to define our new Sampling Units.
    a. First, enter the Study Area under which you are creating new Point Count Transects.
        i. In the first 2 columns **(Study Area Short Name** and **Study Area Name),** put the Short Name and the Name of the Study Area you've been working in (this is your service branch or organization- you can see the short and full names for your Study Area in Project Leader by expanding the tree view on the left side of the page. The short name is in parentheses after the full name).
        ii. Copy these 2 cells down in the next 3 rows so you have a total of 4 rows with your Study Area names (your service branch – Air Force shown for an example).

Study Area Short Name	Study Area Name
AIRFORCE	Air Force
AIRFORCE	Air Force
AIRFORCE	Air Force
AIRFORCE	Air Force

    b. Next, define the existing and new Point Count Transects you want to create points under.
        i. In row 2, for the **Point Count Transect Short Name** and **Point Count Transect Name** (Column C and D), enter the name of the transect you created in Exercise 1. This transect already exists, we are just adding a new point to it. (*Tip: use the following table for reference*).
        ii. In row 3, Columns C and D, add a <u>new</u> Point Count Transect Short Name and Point Count Transect Name. The Name and Short Name can be the same as each other, but they have to be different from all others in the project.
        iii. In row 4 and 5, copy the information from row 3 into Columns C and D. This will create three rows for this transect and leaves space to add three points. Your spreadsheet should now look something like this:

	A	*B*	*C*	*D*
1	Study Area Short Name	Study Area Name	Point Count Transect Short Name	Point Count Transect Name
2	AIRFORCE	Air Force	ABC	ABC
3	AIRFORCE	Air Force	DEF	DEF
4	AIRFORCE	Air Force	DEF	DEF
5	AIRFORCE	Air Force	DEF	DEF

c. Next, add points to the transects.
   i. In row 2, for the **Point Count Point Short Name** and **Point Count Point Name**, enter a ***new*** point name. (If you follow the naming scheme from Exercise 1 and named your first point "1", you should name this point "2".)

   ii. In rows 3, 4, and 5 for Columns E and F (Point Count Point), add 3 more new point names. You should now have four unique point names in columns E and F, and your Spreadsheet should look similar to this:

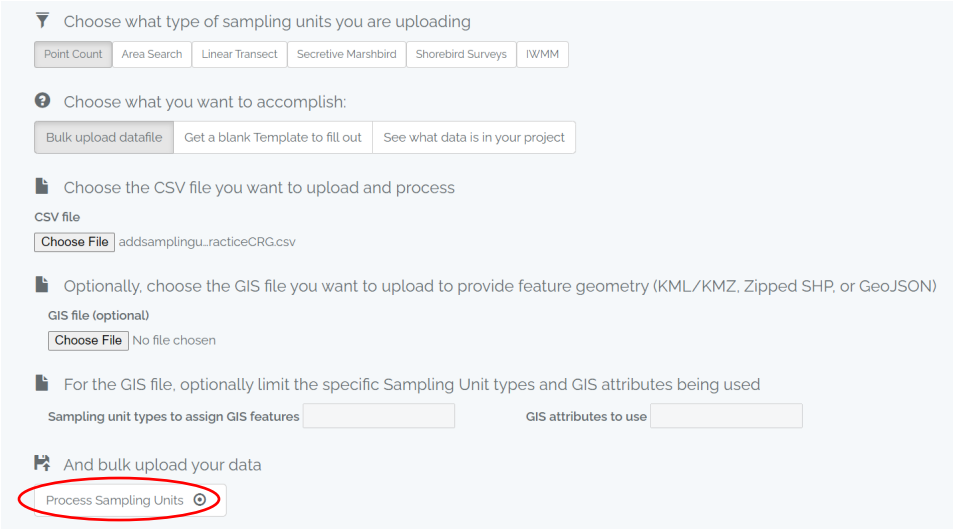
Study Area Short Name	Study Area Name	Point Count Transect Short Name	Point Count Transect Name	Point Count Point Short Name	Point Count Point Name
GUARD	National Guard	ABC	ABC	ABC_2	ABC_2
GUARD	National Guard	DEF	DEF	DEF_1	DEF_1
GUARD	National Guard	DEF	DEF	DEF_2	DEF_2
GUARD	National Guard	DEF	DEF	DEF_3	DEF_3

d. You can leave Latitude and Longitude blank for now.
e. Save the sheet as a CSV file. **Note where you've saved it** and the name of the file.
   i. NOTE: this feature is not available in the online version of Excel. Ask for help if you are unable to save your spreadsheet as a CSV file.

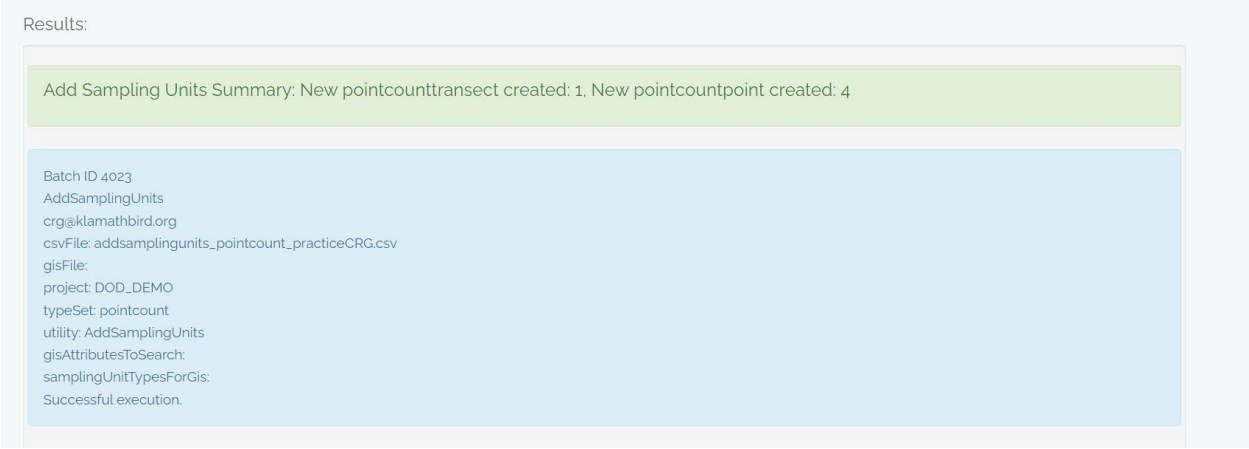
8. Return to **Bulk Uploader** (following Steps 1- 4 again if necessary). This time under "*Choose what you want to accomplish*", click the "**Bulk upload datafile"** option.

9. Under "*Choose the CSV file you want to upload and process"*, click the "**Choose File"** button and select the CSV file you just saved.

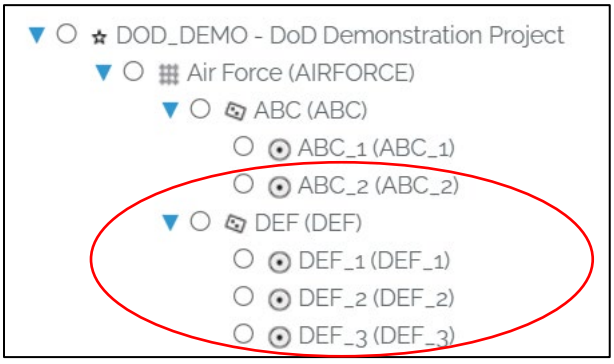
10. At the bottom of the form, click the "**Process Sampling Units"** button (skipping the optional step to upload a GIS file.)



11. The tool will submit your CSV as a “batch” for processing on the server which may take some time. If you did everything correctly, you should see a green message when it is completed with the number of new sampling units created. If you got a red message, that means the application hit a problem with your CSV file. Based on the message, reopen the CSV file, make changes, save it, and return to step 8.



12. See how your Sampling Units look in the project. Navigate back to the Sampling Unit Manager tool and expand the DOD_DEMO project. You should see the new Sampling Units you created in the sampling unit hierarchy for the project.



Thinking Ahead: The Bulk Upload tool is useful when you have many sampling units that you need to add to your project and it would be too time-consuming to add point count transects one at a time. You can use this tool to add sampling units to an existing hierarchy or create an entirely new hierarchy. The Bulk Uploader can also be used to add Researchers to your project or to upload Observation data, but we will not be covering those use cases in this exercise. Historic data is typically entered as a bulk upload.