Exercise 3: Bulk load sampling units

Purpose: In Exercise 1, you used the Project Leader tool to create sampling units (a transect with one associated point). This exercise gives you an introduction to the Bulk Uploader tool. 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.

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.

Goal: In this exercise we are going to bulk load a new point onto your existing transect, and add a new transect with 3 points.

1. Open **Bulk Uploader** (https://data.pointblue.org/science/projectmanager/bulk_uploader) and log in if needed.
2. 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.
7. Using **Excel** or other spreadsheet program of your choice open the CSV template file to define our new sampling units.
   a. In the first 2 columns **(Study Area Short Name** and **Study Area Name),** put the Short Name and the Full Name of the Study Area you've been working in (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) see Exercise 1 -- eg "AIRFORCE" for the short name and "Air Force" for the full name).
   b. Copy these 2 cells down in the next 3 rows so you have a total of 4 rows with your Study Area names.
   c. In row 2, for the **Point Count Transect Short Name** and **Point Count Transect Name** (Column C and D), enter the name of transect you created in Exercise 1.
   d. Still in row 2, for the **Point Count Point Short Name** and **Point Count Point Name**, enter a new point name (you can be creative here or go back to Exercise 1 about a naming scheme – just make the new point unique)
   e. In row 3, Columns C and D (Point Count Transect), add a new name (again, be creative, or add a letter to the other transect name). Copy those 2 cells down in rows 4 and 5. As

a reminder, you are created a new transect with three new points, so this new transect name needs to be in all three rows.

      f.   In rows 3, 4 and 5 for Columns E and F (Point Count Point), add 3 new point names.

      g. The resulting spreadsheet should have:

           i.   Data in rows 2 through 5

          ii.   In Columns A and B, the same values in all rows

        iii. In Columns C and D, row 2 with unique values and rows 3 through 5 with the same values

        iv. In Columns E and F, different values in all rows

      h. Save the sheet as a CSV file and 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. Back in **Bulk Uploader**, under "**Choose what you want to accomplish**", click on 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 in Excel.

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

11. The tool will submit your CSV as a batch for processing on the server. Note if you see a warning pop up saying "no file chosen", it can be ignored. 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 reprocess it the same way.

12. Use Project Leaders (https://data.pointblue.org/apps/projectleaders/) to see how your additions to the sampling unit hierarchy looks in our project.