



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. Navigate to the **Bulk Uploader**. Go to the DoD AKN Portal (dodakn.org). Click on the “Manage Data Now” button on the home screen. Scroll down to the heading “Get Data In” and click on the Bulk Uploader Application (https://data.pointblue.org/science/projectmanager/bulk_uploader). 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. First, define which 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 Long 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 long 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.

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

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- b. Next, define 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 transect you created in Exercise 1. This transect already exists, we are just adding new point to it.
 - ii. In row 3, Columns C and D (Point Count Transect), add a new Transect Short Name and Transect Name (the Transect Name and Short Name can be the same, but they have to be different from any other names 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:

Study Area Short Name	Study Area Name	Point Count Transect Short Name	Point Count Transect Name
AIRFORCE	Air Force	CRGA	CRGA
AIRFORCE	Air Force	CRGB	CRGB
AIRFORCE	Air Force	CRGB	CRGB
AIRFORCE	Air Force	CRGB	CRGB

- 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 (you can be creative here or go back to Exercise 1 about a naming scheme – just make the new point unique)
 - ii. In rows 3, 4 and 5 for Columns E and F (Point Count Point), add 3 new point names.

Your Spreadsheet should now look like 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
AIRFORCE	Air Force	CRGA	CRGA	CRGA-2	CRGA-2
AIRFORCE	Air Force	CRGB	CRGB	CRGB-1	CRGB-1
AIRFORCE	Air Force	CRGB	CRGB	CRGB-2	CRGB-2
AIRFORCE	Air Force	CRGB	CRGB	CRGB-3	CRGB-3

- d. You can leave Latitude and Longitude blank for now.
 - e. 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. See how your Sampling Units look in the project. Navigate back to the Biologists Application, select the project DOD_DEMO, and click on “Manage Sampling Units for Project.” You should see the new Sampling Units you created in the sampling unit hierarchy for the project.