



## 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. In this exercise, we are going to bulk load 1) **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 DoD AKN Portal (dodakn.org).
2. In the drop down box, select the project **DOD\_DEMO**
3. Click on “**Add Sampling Units**” in the tabs below the project.
  1. Click on “**Point Count**” in the choice of sampling unit types.
  2. Click on “**Get a blank template to fill out**” under *Choose what you want to accomplish*.
  3. 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.

Add Researchers   Add Sampling Units   Add Observations   Add Protocol   Batches

### Add Sampling Units

This tool will load new sampling units into your project as defined in a CSV file. First, choose what type of sampling units you need to create -- they should match the type of data you want to have in your project. Download the blank CSV Template for the type of sampling units you have selected. Each type of Sampling Unit you require in the sampling hierarchy will have 2 columns: one is Short Name (the abbreviated name, required) and the other is Name (the descriptive name, optional). Any latitude/longitude coordinates uploaded are assumed to be in WGS-84. Any sampling unit in the data file that already exists in the project will not be added again.

Choose what type of sampling units you are uploading

Point Count   Area Search   Linear Transect   Secretive Marshbird   Shorebird Surveys   IWMM

Choose what you want to accomplish:

Bulk upload datafile   **Get a blank Template to fill out**   See what data is in your project

Download an empty CSV template file to fill out for uploading

**Download CSV Template**



4. 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 full Name of the Study Area you've been working in (this is your service branch - 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 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 a 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	ABC	ABC
AIRFORCE	Air Force	DEF	DEF
AIRFORCE	Air Force	DEF	DEF
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 that created 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 different new point names. You should have four unique point names in columns E and F. 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
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 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.
- 5. Back in **Bulk Uploader**, under “**Choose what you want to accomplish**”, click on the “**Bulk upload datafile**” option.
- 6. Under “**Choose the CSV file you want to upload and process**”, click the “**Choose File**” button and select the CSV file you just saved.
- 7. At the bottom of the form, click the “**Process Sampling Units**” button. (You should skip the optional step to upload a GIS file.)

The screenshot shows a web form titled "Choose what type of sampling units you are uploading". It has several sections:

- Choose what type of sampling units you are uploading:** Includes tabs for Point Count, Area Search, Linear Transect, Secretive Marshbird, Shorebird Surveys, and IWMM.
- Choose what you want to accomplish:** Includes buttons for "Bulk upload datafile", "Get a blank Template to fill out", and "See what data is in your project".
- Choose the CSV file you want to upload and process:** Shows a "Choose File" button and the filename "addsamplingu\_racticeCRG.csv".
- Optionally, choose the GIS file you want to upload to provide feature geometry (KML/KMZ, Zipped SHP, or GeoJSON):** Shows a "Choose File" button and "No file chosen".
- For the GIS file, optionally limit the specific Sampling Unit types and GIS attributes being used:** Includes input fields for "Sampling unit types to assign GIS features" and "GIS attributes to use".
- And bulk upload your data:** Includes a "Process Sampling Units" button.



- The tool will submit your CSV as a batch for processing on the server. 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.

Results:

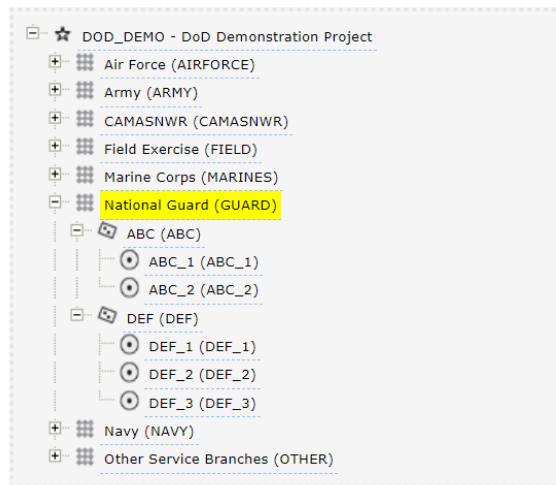
Add Sampling Units Summary: New pointcounttransect created: 1, New pointcountpoint created: 4

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Batch ID 4023
AddSamplingUnits
crg@klamathbird.org
csvFile: addsamplingunits_pointcount_practiceCRG.csv
gisFile:
project: DOD_DEMO
typeSet: pointcount
utility: AddSamplingUnits
gisAttributesToSearch:
samplingUnitTypesForGis:
Successful execution.

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- See how your Sampling Units look in the project. Navigate back to the Project Leaders application, select the project DOD\_DEMO, and click on “Create and manage” under *Sampling Units*. 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.