Assessment Batch Upload Instructions

Version: 8/12/2021

Purpose: This document provides instructions for using the Assessment Batch Upload.

Audience: This is for state, territory, and tribal users. Assessment Batch Upload can only be completed in Organization-controlled cycle statuses. It does not work in EPA-controlled cycle statuses.

Upload Assessments

1. Go to the Assessments module → Menu button → Upload Assessments
2. Choose whether to Update or Replace data and click Next.
   a. **Update:** Update adds new data or updates existing data associated with any Assessment Unit IDs in the file. It does not delete existing data.
      i. Example 1: Assessment Unit ID X1 already has Aquatic Life Use associated with it. The new files include Recreation but do not include Aquatic Life Use. Update will add the Recreation Use and keep the Aquatic Life Use information.
      ii. Example 2: Assessment Unit ID X2 already has a Recreation Use associated with it. The new files contain edited data for the Recreation Use and a new Use of Fish Consumption. In this situation, ATTAINS would update the data for the Recreation Use and add the new Fish Consumption Use.
   b. **Replace:** Replace removes old data associated with any Assessment Unit IDs in the file and replaces that old data with only the new data provided in the uploaded files. Replace can be used to add new Assessment data and replace or delete data on existing Assessments. Note: If any fields (columns) are left blank in the uploaded file, the existing data in that field on that Assessment will be deleted (replaced with blanks).
      i. Example 3: Assessment Unit X3 already has Aquatic Life Use and Public Water Supply Use associated with it. The new files contain Aquatic Life Use and Recreation. Replace would keep the Aquatic Life Use and Recreation Uses that are in the file, but would delete the Public Water Supply Use and corresponding information because it was not in the new files.

UPDATE Assessments

1. Update allows you to upload one or more files at a time. Look through the table to determine which files are required, recommended and optional depending upon what data you want to upload.
2. Click on the "Choose File" button to open a file selection pane. Locate the corresponding file(s) on your computer. You can select multiple files at one time by holding down Control (CTRL) and selecting multiple files.
3. Click the "Upload and Validate" button.
4. The information banner at the top of the page will provide progress information.
5. ATTAINS will validate each Assessment and write the results to the Summary Report(s).
   a. The **Simple Summary Report** provides one row per Assessment Unit ID. This report will show an Upload Status of OK or ERROR.
      i. Warning messages ("WARN:") indicate that the upload can proceed, but that additional information will be needed before the cycle can be submitted.

> > ii. Error Messages ("ERROR:") indicate that the upload cannot proceed until the Error is fixed.
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> b. The **Advanced Summary Report** provides one row per Error or Warning. An Assessment Unit ID that has multiple errors, will have multiple rows in the Advanced Summary Report. Alternatively, Assessment Unit IDs that have no errors or warnings will not appear in this report.

6. If the files validated without errors, proceed to Step 9.
7. If the files have errors, try to address the errors. The article **Assessment Batch Upload: Tips to Avoid Common Errors** may provide additional information for how to locate and fix common errors and how to avoid them in the future. Note: Some errors may need to be fixed and the files validated again before ATTAINS can locate additional errors on the same Assessment Unit ID.
   a. Example: An Assessment Unit ID must exist in the Assessment Units module before it can be used in the Assessments module. The Assessment data may have other errors in the files but ATTAINS would first tell you that the Assessment was not found in ATTAINS. After adding the new Assessment Unit ID to ATTAINS, the next validation attempt may find additional warnings and errors.
8. If you cannot locate the errors, you may want to try uploading one file at a time in this order. If it validates and loads, then try the next file combination. It helps narrow down the file that is causing the errors. Some files need to be loaded together, so it helps to build on the files that validate correctly by adding one additional file each time.
   a. First load the Assessments file.
   b. Then load the Assessments and Uses files together.
   c. Then load the Assessments, Uses and Parameters files together.
   d. If you have assessment decisions that vary by Seasons, then load the Assessments, Uses, Parameters, and Seasons files together.
   e. Then load the Associated-Actions file. (This can usually be added by itself.) Note: The Action IDs in the Associated-Actions file must already exist in ATTAINS before they can be associated with Assessments.
   f. Then load the other files one at a time (Assessment Types, Assessment Method Types, Sources).
9. If the files validate without errors, you can proceed with the upload. Depending on the number of records in the file(s), it could take some time to upload.
10. **DO NOT CLOSE** the browser tab while the system is uploading the file. If the browser tab closes or navigates away from the upload page, ATTAINS will cancel the upload. You can leave the browser tab open to continue processing in the background while you work on other tasks.
    a. **Note:** The timeout clock is paused while ATTAINS is validating or saving a file, but it resumes after ATTAINS completes processing. Check on the progress periodically to avoid timing out of ATTAINS after it finishes processing.
11. Check the results of the upload.
    a. ATTAINS will tell you whether everything uploaded correctly, or whether specific Assessments failed. You can also download a Save Report.
    b. If any Assessments failed, you can fix the issues on those and upload those separately.
    c. Spot check a few of the Assessments that you uploaded to ensure the data appear as you expected.

REPLACE Assessments

Replace can be used with a subset of your Assessments. Replace will ignore any existing Assessment data on Assessment Unit IDs that are excluded from the files being uploaded.

1. **IMPORTANT:** It is good practice to Export Assessments prior to using the Replace function to have a backup copy in case you accidentally delete data.
2. Replace requires you to upload **all populated data files at one time**. If you do not include a file or leave a column blank in a file, it will delete the corresponding data for the Assessment Units being uploaded.
3. Click on the "Choose File" button to open a file selection pane. Locate the corresponding file(s) on your computer. You can select multiple files at one time by holding down Control (CTRL) and selecting multiple files.
4. Click the "Upload and Validate" button.
5. The information banner at the top of the page will provide progress information.
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      ii. Error Messages ("ERROR:") indicate that the upload cannot proceed until the Error is fixed.
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