

Assessment Unit (AU) Batch Upload Instructions

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

Audience: This is for state, territory, and tribal users. EPA users cannot edit Assessment Units.

Upload Assessment Units vs. Manage Assessment Units

There are two options in the Assessment Units menu that may sound similar, but they have different functions and use different templates.

- Upload Assessment Units
 - Can be used to add new Assessment Units or add or edit data related to the definition, description, and location of the Assessment Unit
 - Uses the “Assessment Unit Batch Upload Template” or “au_batchupload_template”
- Manage Assessment Units
 - Allows users to Rename, Retire, or Delete Assessment Unit IDs
 - Uses the “Bulk” templates (“Bulk_Rename”, “Bulk_Retire”, “Bulk_Delete”)

Upload Assessment Units – Choosing Between UPDATE vs. REPLACE

To add new Assessment Units or add or edit data related to the definition, description, and location of the Assessment Unit, choose “Upload Assessment Units” from the Menu button.

1. Go to the Assessment Units module → Menu button → Upload Assessment Units
2. Choose whether to Update or Replace data and click Next.
 - a. **Update:** Think of Update as an Append function. It adds new data or updates existing data associated with any Assessment Unit IDs in the file(s), but it does not delete existing data that were excluded from the upload files.
 - i. Example 1: Assessment Unit ID X1 already has a county Location associated with it. The new files include an additional county Location. Update will add the new county and keep the existing county so that both county values remain in the data.
 - b. **Replace:** Replace removes old data associated with any Assessment Unit IDs in the files and replaces that old data with only the new data provided in the uploaded files. Replace can be used to add new Assessment Units and replace data on existing Assessment Units.

Note: If any fields (columns) are left blank in the uploaded file, the existing data in that field on that Assessment Unit will be deleted (replaced with blanks). Replace can be used with a subset of your Assessment Units. Replace will ignore any existing Assessment Unit IDs in ATTAINS that are excluded from the files being uploaded.

- i. Example 2: Assessment Unit ID X2 already has a county Location associated with it. The new files include a different county Location. Replace will include the new county location and remove the original county location if it is excluded from the upload files.

Assessment Unit Batch Upload UPDATE

1. Update allows you to upload one or more files at a time. Look through the informational table on the Assessment Unit Batch Upload -> Update screen to determine which files are required, recommended or 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 Unit 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.
 - 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 8.
7. If the file(s) have errors, you may want to try uploading one file at a time in this order. It helps narrow down the file that is causing the errors. (If the file(s) did not have errors, proceed to the next step.)
 - a. First load the Assessment Units file.
 - b. Then load the Water Types file.
 - c. Then load the Locations file.
 - d. Then load the Monitoring Stations file.
8. If the files validate without errors, you can proceed with the upload. Scroll to the bottom of the page and select the “Proceed and Save” button. Depending on the number of records in the file(s), it could take some time to upload.
9. **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 process in the background while working 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.
10. Check the results of the upload.
 - a. ATTAINS will tell you whether everything uploaded correctly, or whether specific Assessment Units failed. You can also download a Save Report.
 - b. If any Assessment Units failed, you can fix the issues on those and upload those separately.
 - c. Spot check a few of the Assessment Units that you uploaded to ensure the data appear as you expected.

Assessment Unit Batch Upload REPLACE

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

1. **IMPORTANT:** It is good practice to Export Assessment Units 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.
6. ATTAINS will validate each Assessment Unit 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.
 - 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.
7. If the files validate without errors, you can proceed with the upload. Depending on the number of records in the files, it could take some time to upload.
8. **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.
9. Check the results of the upload.
 - a. ATTAINS will tell you whether everything uploaded correctly, or whether specific Assessment Units failed. You can also download a Save Report.
 - b. If any Assessment Units failed, you can fix the issues on those and upload those separately.
 - c. Spot check a few of the Assessment Units that you uploaded to ensure the data appear as you expected.

Manage Assessment Units using “Bulk” templates

The Manage Assessment Units option can be used to Rename, Retire, or Delete a set of Assessment Unit IDs from ATTAINS.

1. To utilize one of these options, obtain the appropriate “Bulk” template from the ATTAINS public website (<https://www.epa.gov/waterdata/upload-data-resources-registered-attains-users#batch-upload-templates>).
2. Fill out the appropriate template based upon what you want to do.
 - a. Bulk Rename – Allows you to rename Assessment Unit IDs from an existing ID to a new ID.
 - b. Bulk Retire – Allows you to retire Assessment Unit IDs in ATTAINS. Retired Assessment Units can be seen in ATTAINS but no new Assessments can be associated with them.

- c. Bulk Delete – Contact your regional Data Management Coordinator or the ATTAINS Helpdesk (attains@epa.gov) if you would like to delete Assessment Unit IDs so that they do not appear in ATTAINS at all.
3. Go to the Assessment Units module → Menu Button → Manage Assessment Units
4. Upload the appropriate file.
5. Spot check the results to ensure the data appear as you expected.