## Esploro - How to Upload Activities in Bulk

In the Esploro Essentials session about Activities, we covered how to add and edit activities one-at-a-time in the Research Hub and on a Researcher’s Profile. This video demonstrates another way to add activities, by uploading activity information in the form of a spreadsheet. This can be useful when you want to add information about several activities or researchers in a bulk action. This procedure is only for adding new activities, not for editing existing activities.

In the Research Hub, go to Research Management. Under Activities, select Import Researcher Activities. You will use the top section of this page to download a template in the form of a spreadsheet. Then you will add information to the spreadsheet. Then you will use the bottom section of this page to import the activities by uploading the spreadsheet according to your chosen settings.

Let’s demonstrate, starting with the Download Template section. Before you download a template, select which category of activity you will be uploading. Fields relevant to that category will appear as columns in the template. Alternatively, you can select All, and columns for all the fields of all the categories will appear in the template.

In the Import Activities section, notice the options for Date format. Choose one that you will use consistently when adding dates to the template.

Click Download Template.

Open the downloaded file. You will see a spreadsheet with labeled columns. For each activity, fill in one row according to the labeled columns.

You may find it helpful to look at the form for adding a single activity, as a guide. Mandatory fields must be filled-in on the spreadsheet, or else there will be an error with the upload. Non-mandatory fields may be left blank.

For some columns, you will need to add the exact code name, such as “activity.conference”.

To find the code name, you can use the code tables which are in the Configuration menu > Research Administration, under Activities. For example, here is the code table for Activity Types.

To enter a researcher, use their primary identifier, which is their username when signing-in to Esploro.

If you aren’t sure what that is, you can look them up by opening Researchers > Manage Researchers. Next to the name of each affiliated researcher is an ID-card icon. Click this icon to show more information, including Primary Identifier. Alternatively, you can also see a researcher’s primary identifier on the side panel of their Researcher Details. Depending on the size of your screen, this panel may instead appear at the top.

For columns with multiple values, such as an activity associated with several researchers, separate the values with a semi-colon without spaces, as seen here.

As we mentioned, the date format for activityStartDate and activityEndDate must be consistent. Partial dates are supported, so you may enter just month and year, or even just the year.

When you have finished entering information into the template, save it.

Then, back on the page for Import Researcher Activities, in the Import Activities section, select the Date format and the Language. Choose to import the activities as Approved or Not approved. Approved activities will be publicly available immediately in the Portal and Profiles, according to the visibility settings. Select the file you saved. Click Run Now.

The Activities will be loaded into Esploro, and a report will be emailed to you to let you know that the job has ended.

Here we can see a new activity that has been created.

That’s how to upload activities in bulk.