Import Tool, Part 2 – Tutorial #18

The Import Tool is used to bring data into Cow Sense from outside sources. Data must first be organized to easily be imported, which is discussed in Part 1. Part 2 of the Video Tutorial covers the actual use of the Import Tool.

Always back up your herd file before beginning work with the Import Tool as you may change large amounts of data at one time. There is no way to undo changes made in the Import Tool, so it is highly recommended to have a backup to restore your herd to if a mistake were to be made.

Once you have your data ready and your file selected in the Import Tool, It is time to begin stepping through the steps to import your data.

Set up Data Fields

When the Step 2 "Select Import Options" Window is reached, the information being added must be matched to the appropriate records in Cow Sense. First, select the import type. You can import data related to Animal records, Breeding records or Notes by selecting from these options from the drop down to the right of "Target".

Next, select the Import Method. Animal records may be either added by choosing the "Add New" option or existing animal records updated by choosing the "Update" option available through this tool. Notes and Breeding records may only be added to existing animal records with the "Add New" option. Entries being modified must be linked to an individual existing record through an Identity GUID (Cow Sense Globally Unique Identification), Visual Tag, EID (Electronic ID) Number, or a Feeding Link Identity (unique ID applied at a feedlot).

If Visual Tag is selected as the Linking Field, the drop-down menus on the right will open. Since a Visual Tag may be used more than once in a herd, it may be narrowed down by Season (Calving Season that animal record was assigned to in Cow Sense), Status or Type, or by both Status and Type combined.

If your data contains a Header Row, check the box indicating this for the Sample Data. This will cause the Import tool to skip data in the first row and instead use the Header Row as the mapping labels of the Source Fields**.**

When updating animal records, the option is available to Clear target fields when value is empty. Clicking this will **ERASE** existing data in the Cow Sense herd file when no data is present for that field in the information being imported. Not selecting or unchecking (toggling radio button off) this option will **NOT make changes** to existing data if fields are blank in the data to be imported.

After reviewing the data displayed to be imported, confirm it is correct.   If you wish to return back to Step 1, choose the "Back" button. If you wish to cancel the operation and exit the Import Tool choose the "Cancel" button. If you wish to proceed with the import of this data, choose the "Next" button in the lower right.

Link Data

Clicking Next will reveal the Step 3 Window to "Choose a target field" for the columns you wish to import. The first phase of this step is to match the Source Field to the Target Field for each category of data you would like to import. Think of this like creating a map for the

Import Tool to use to import the source data into the fields in Cow Sense where you want it to be inserted. The Source Field and Target Field names don't need to be the same, but the corresponding data in these fields must be compatible and meet the criteria of the desired target field by displaying the proper text or codes. Remember our previous example of the letter H versus word Heifer.

Also consider and evaluate your target fields. For example, if you are updating existing records, then you should not need to map and import the birth date. That data would have been loaded when creating the original record. Do not import data that is already in the original record correctly. Again, click on the blue question mark icon to verify the accepted codes. **You don't need to link each field in the list of Source Fields, but those not linked will not be imported.**

When all the fields you wish to import are linked and you wish to proceed with the import of this data, choose the "Import" button in the lower right.

Review Data

After the data is imported, the Step 4 Window "Review the results" will appear. This window displays a Results Log detailing all events the Import Tool encountered. At the top will be the documented time of import, and a summary of all the specifications of the import you had selected in Steps 1 and 2. Beneath this information, if any problems occurred or information is found to be incompatible or is missing, these issues will be listed individually to show you where and why they occurred. A number at the bottom of the screen (log) shows the total amount of successful entries and errors. These results may be saved as a Text Document with a .txt extension to be used for reference as you work, or to share with Cow Sense support staff.

The Import Tool can save your Target Field selections for future use, which is helpful when repeatedly importing data from the same source and all header fields are named and positioned the same as those used previously. At the bottom of the Import log, choose the Save Spec button and give your current specifications a name. You may save as many sets of specs as you want.

If problems did occur, view the errors and correct the mistakes in your Source Data, and try again. Before re-importing data to correct errors or mistakes, you should first restore to the backup you made before the original import to avoid creating duplicate entries.

If importing different types of data from one worksheet (ex. A worksheet that includes both information about a cow and calving related data), make a **backup between each import** to minimize the changes made at once. This will save time as you work through the import process.

The next time you wish to import data with parallel source data, click "**Recall Spec"** in Step 3 and select the proper set of specs to match your data to the Target Fields. After clicking Recall Spec, you may still modify the targets individually as needed. Note that Recall Specs will only match the Target Fields by their order, not necessarily by the information they contain. Always check to make sure that your source information is still directed to the correct target field before clicking Import. **As always make sure you have made a backup of your herd file prior to importing data**.

When finished importing data, review it in Cow Sense. If data was imported for a group of animals, the List View and Standard Reports are helpful to review the new or updated records.