



Notes to Video Tutorial

Import Tool, Part 1 – Tutorial #17

The Import Tool in Cow Sense NxGen provides a method for bringing in data from outside sources. These notes are for Part 1 of the Video Tutorial, which covers data preparation for import. Part 2 will follow with the use of the Import Tool.

Examples of data to prepare and import may include information kept or recorded in spreadsheets, data retrieved from a scale indicator, progeny feeding or harvest data, ultrasound data as well as many others. The Import Tool may be used to either create new records or add additional data to existing records.

Before you begin

Before using the Import Tool, it is important to first backup your herd. The Import Tool allows you to quickly add or modify many records at once. Mistakes made in the import process cannot be undone, so the only way to restore your herd file to a state prior to the import is to return to a previous backup you have saved. To make a backup; select **Tools > Backup** from the Task Pane on the left, and save your herd file to the desired location. If you will be making multiple imports it is highly recommended to make a new backup between each import to protect against mistakes.

Ensure that the desired fields are turned on for data import by **clicking on Options>Data Field Settings>Standard Fields**. Make sure the boxes are checked next to the data fields that you wish to import so that they will show on the import screens later in the process.

The Import tool is opened by selecting **Tools > Import** from the Task Pane. Before stepping through the module, click on the question mark icon “?” in the lower left corner. Here you will find basic step-by-step directions for using the Import Tool.

Notice the valid data dropdown values listed near the end of the help document. These are common values that are available from data entry dropdowns in Cow Sense. As these values are validated, your raw data to be imported must match up with these in order to import successfully. Version 4 users should especially take note of these values, as many have changed with the Upgrade to the NxGen platform.

Format Data

The first stage to successful use of this dynamic tool is to prepare your file to import. The Import Tool will accept comma separated text (.CSV), tab separated text (.TXT) or Microsoft Excel (.XLS) files. Ensure that the values used in the spreadsheet match either valid Cow Sense standards or any custom fields that you have created. If not, these must be changed before an import can be successfully completed. For Example, if data is recorded in your spreadsheet listing sex of heifers as H and bulls as B, it will error on import as these are not valid values recorded in Cow Sense (*in this example, “Heifer” and “Bull” are specified values*). This data must be changed in your spreadsheet before importing. The program will **NOT** read any entries that go in drop-down menus unless they are **EXACTLY** the same as what is used in the program.

The Find and Replace tools in your spreadsheet program may come in handy when trying to change data in a list. You can simply select a column in the spreadsheet and replace selected values, for example every letter H in that column with word Heifer.

The Type and Status fields are **REQUIRED** to create an animal record in Cow Sense. If you are adding new records, these fields must be included and data listed for each animal in your data set.

Make sure that the import file is clean and without any extra information or blank data fields. It is a good practice to copy just the data you wish to import into a new file to eliminate any blank rows or irrelevant data. The file may not import correctly otherwise. A **single** header row may be used to match information, however, if used ensure that the header labels are listed in the first row only. After the file has been formatted correctly in your spreadsheet program, save and close it.

Import Tool

Open the Import Tool by clicking **Tools>Import**. In the Step 1 Import Window select your file to be imported by clicking on the **"Browse"** button of the Import Tool. The "Open" Window will appear. The tool will remember the last location and file type that was used and will by default open to that same location or Directory on your computer. If the file to be imported is not in the same location you will need to navigate to that location from the dropdown at the top of this window. If the file type is different and is not displayed in this view, check the **"File type"** drop down at the bottom to verify the type you're searching for is selected. Once you have found the file select it and click **"Open"**. To cancel the operation and close the Import Tool choose the **"Cancel"** button at the bottom of this window.

To proceed with the import, click **"Next"** on the Step 1 Window. If the selected file has multiple sheets, a screen will appear asking you to choose a sheet. You may only import from one sheet at a time. You may also prepare each sheet for import and save as a separate file to be loaded.