xChekPlus Case Import

User Manual Addendum

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Overview

This addendum supplements the user manual included with your xChekPlus* software. Please use this addendum as a reference when using the case information import function added in xChekPlus* software version 4.2.3.

New functionality:

- Create and activate an import mapper.
- Import case information into a template.
- Review the import log.

Introduction to the case import feature

The xChekPlus* software includes a Case Information window where you can manually add case and population information, such as veterinarian name and reason for testing, to your templates. Case information is essential for generating meaningful reports.

Beginning with xChekPlus* 4.2.3, if you have case and population information in a separate spreadsheet, you can now import the information directly into xChekPlus instead of entering it manually, saving you time and effort while improving workflow and reducing data entry errors.

Importing case information requires four steps:

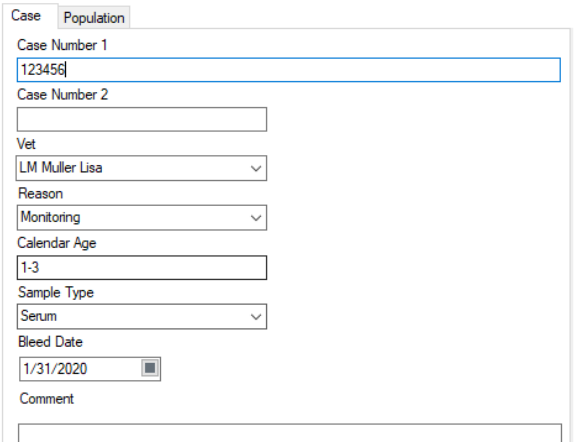
1. Review the xChekPlus case information descriptions, to ensure that you import data into the appropriate fields in xChekPlus.
2. Create and activate an import mapper that maps the column headers from your spreadsheet to the field names in the xChekPlus software.
3. Import case information into a template using the mapper.
4. Review the import log to resolve any issues.

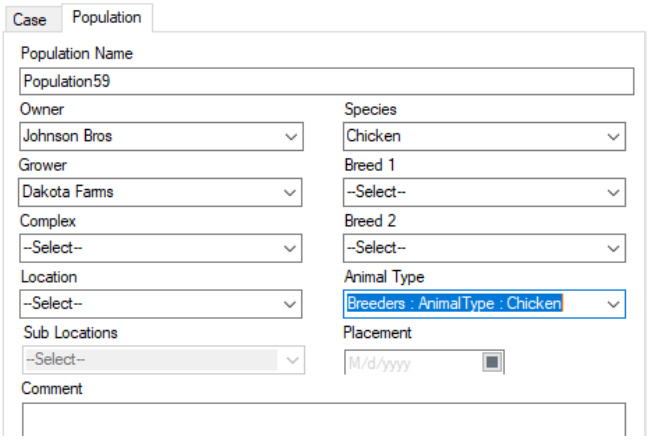
This addendum explains how to complete the steps above.

Review xChekPlus case information descriptions

It is important to understand the purpose and labels of xChekPlus fields to maximize the benefit of the import function and avoid inconsistencies in data. Matching sample information to the appropriate xChekPlus fields ensures that you can search for your information efficiently and generate meaningful reports.

xChekPlus Case and Population fields:





When creating the import mapper, refer to the table below, which describes the data that can be imported. **Note:** Not all data fields apply to all species.

xChekPlus fields

xChekPlus field	Purpose
Case/Case Number 1/Case ID	Identifies the sample on a plate. For laboratories that have a laboratory information management system (LIMS), this is usually the sample accession number. This is a required field when creating an import mapper.
Placement	The date a population or flock was placed at a grower. Used primarily in poultry.
Age	Age of the animal/bird
Case Number 2	An optional field you can use for data that doesn't fit into other fields. Once you decide how to use the field, always use it consistently. For example, if you choose to import farm names into this field, then use it for farm names only.
Vet	Name of the veterinarian ordering testing and receiving results
Reason	Reason for testing; examples: monitoring, training, retest, etc.
Sample type	Type of sample being tested; examples: serum, whole blood, ear notch, etc.
Bleed date	The date the sample was taken
Comment (Case)	Free text comments about a case
Owner	The company that owns the animal(s) being tested. **Note:** Do **not** use this field to record veterinarian or farm names.

xChekPlus field	Purpose
	For poultry/swine: the name of the poultry, swine, or protein company For ruminants: the name of the rancher, stocker/backgrounder, feed yard, etc. In most independent laboratories (state, university, and other company-independent laboratories) this is the name of the bill-to party. In most company laboratories (laboratories running their own samples only): this field may be used for other purposes, but do **not** use this field to record veterinarian or farm names.
Complex	A division or unit. A complex may contain several farms. Used mainly in poultry operations.
Grower	The farm or ranch where the animal/bird is located
Location	Location of the animal/bird on the farm/ranch. This may be a house or a barn.
Sub Locations	A location within a location, such as a pen in a barn
Species	The animal species. Only the following are accepted: Cattle, Chicken, Deer, Equine, Swine, Turkey.
Breed 1	Optional designation for the animal
Breed 2	Secondary optional designation for the animal
Animal Type	Optional animal descriptor; examples: Breeder, Broiler, Heifer, Sow, etc.
Comment (Population)	Free-text comments about a population

Create and activate an import mapper

An import mapper tells the xChekPlus software where to place the data from your import file (i.e., from your spreadsheet).

To use the import function, your case information must be in a CSV (comma-separated value) file that contains one or more cases with the case information in individual columns. Your file may have column headers or not.

If you have different case information spreadsheets with different formats, you must create a mapper for each one. If you use only one spreadsheet format, then you need only one mapper.

Below are examples of a poultry import file.

With column headers

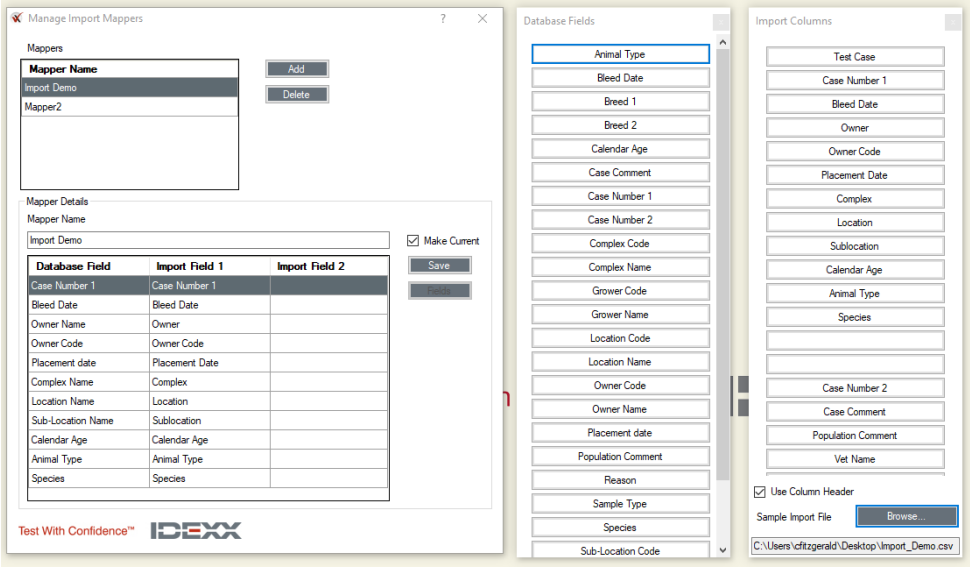
A	B	C	D	E	F	G	H	I
Accession	Age	Sample Date	Placement	Customer	Customer ID	Farm	Type	Sample
123546	15	2/1/2019	1/15/2019	ACME Chicken	AC123	Johnson's Acr	Breeder	Serum
123547		1/31/2019	6/25/2018	Big Chicken Co.	BC345	Holly Acres	Breeder	Serum
123548	210	2/1/2019		Big Chicken Co.	BC345	Elm Grove	Breeder	
123549	156	1/31/2019		Big Chicken Co.	BC345	Happy Orchar	Breeder	
123550	1	2/1/2019		Giant Poultry	GP597		Breeder	
123551	335	1/31/2019	3/2/2018	Giant Poultry	GP597	Farm A345		Serum

Without column headers

A	B	C	D	E	F	G	H	I
123546	15	2/1/2019	1/15/2019	ACME Chicken	AC123	Johnson's Acr	Breeder	Serum
123547		1/31/2019	6/25/2018	Big Chicken Co.	BC345	Holly Acres	Breeder	Serum
123548	210	2/1/2019		Big Chicken Co.	BC345	Elm Grove	Breeder	
123549	156	1/31/2019		Big Chicken Co.	BC345	Happy Orchar	Breeder	
123550	1	2/1/2019		Giant Poultry	GP597		Breeder	
123551	335	1/31/2019	3/2/2018	Giant Poultry	GP597	Farm A345		Serum

Tips for creating the import mapper and importing data

To create the import mapper, you will use the Manage Import Mapper window, shown below.



Field order

The order of fields in the mapper is not important. Data will be imported based on the association between database fields and import columns.

Buttons, columns, and checkbox descriptions in the window

- Add—click to create a new mapper.
- Make Current—indicates the currently active mapper (the one that will be used when you import case information).
- Database Fields column—the fields in xChekPlus for which you can import data.
- Import Columns column—the column names in your import file.
- Use Column Header—check to indicate that the first row in your file is a column header row.

Data import rules

To ensure successful import and preserve data integrity and accuracy, the imported data must follow rules in the table below:

Database field	Rule
Animal Type	If you import Animal Type, you must also import Species. The valid values for species are Cattle, Chicken, Deer, Equine, Swine, Turkey. If the imported data contains an invalid species, you will receive an error message during import. To differentiate ruminants, use the closest available Species option and then use the Animal Type, Breed 1, or Breed 2 field to indicate the specific ruminant being tested.
Bleed Date	Must be a valid regional date format.
Breed 1	If you import Breed 1, you must also import Species. The valid values for species are Cattle, Chicken, Deer, Equine, Swine, Turkey. If the imported data contains an invalid species, you will receive an error message during import. To differentiate ruminants, use the closest available Species option and then use the Animal Type, Breed 1, or Breed 2 field to indicate the specific ruminant being tested.
Breed 2	If you import Breed 2, you must also import Species.

Database field	Rule
	The valid values for species are Cattle, Chicken, Deer, Equine, Swine, Turkey. To differentiate ruminants, use the closest available Species option and then use the Animal Type, Breed 1, or Breed 2 field to indicate the specific ruminant being tested.
Calendar Age	Must be a whole number. Age can be calculated automatically. See the "Calculating age" section for more information.
Case Comment	Free text
Case Number 1	**Required field**. xChekPlus will not import a file or a row in a file if this field is blank.
Case Number 2	Always use the Case Number 2 field consistently. You may use it for any type of information, but once you decide on the information type, always use it for that information type and no other.
Complex Code	Identifier or short code for a complex Complex code/Complex name combinations are unique in xChekPlus. If you are importing complex names without IDs or codes, xChekPlus will assign the code by copying the name. See more detailed information in "Matching codes and names" below.
Complex Name	Complex name If you are importing complex IDs or codes without names, xChekPlus will assign the name by copying the code. See more detailed information in "Matching codes and names" below.
Grower Code	Identifier or short code for grower Grower code/Grower name combinations are unique in xChekPlus. If you are importing complex names without IDs or codes, xChekPlus will assign the code by copying the name. See more detailed information in "Matching codes and names" below.
Grower Name	Grower name If you are importing grower IDs or codes without names, xChekPlus will assign the name by copying the code. See more detailed information in "Matching codes and names" below.
Location Code	Identifier or short code for location Location code/ Location name combinations are unique in xChekPlus. If you are importing location names without IDs or codes, xChekPlus will assign the code by copying the name. See more detailed information in "Matching codes and names" below.
Location Name	Location name If you are importing location IDs or codes without names, xChekPlus will assign the name by copying the code. See more detailed information in "Matching codes and names" below.
Owner Code	Identifier or short code for owner Owner code/owner name combinations are unique in xChekPlus. If you are importing complex names without IDs or codes, xChekPlus will assign the code by copying the name. See more detailed information in "Matching codes and names" below.
Owner Name	Owner name If you are importing owner IDs or codes without names, xChekPlus will assign the name by copying the code. See more detailed information in "Matching codes and names" below.
Placement date	Must be a valid regional date format.
Population Comment	Free text

Database field	Rule
Reason	May match existing entries or be a new entry. Data is case sensitive.
Sample Type	May match existing entries or be a new entry. Data is case sensitive.
Species	Required if importing Animal Type, Breed 1, and/or Breed 2. The valid values for species are Cattle, Chicken, Deer, Equine, Swine, Turkey.
Sub-Location Code	Identifier or short code for sub-location Sub-location code/sub-location name combinations are unique in xChekPlus. If you are importing sub-location names without IDs or codes, xChekPlus will assign the code by copying the name. At least one location field (name or code) must also be mapped if the Sub-Location Code field will be used. See more detailed information in "Matching codes and names" below.
Sub-Location Name	Sub-location name If you are importing sub-location IDs or codes without names, xChekPlus will assign the name by copying the code. At least one location field (name or code) must also be mapped if the Sub-Location Name field will be used. See more detailed information in "Matching codes and names" below.
Veterinarian Code	Identifier or short code for veterinarian Veterinarian code/ veterinarian name combinations are unique in xChekPlus. If you are importing veterinarian names without IDs or codes, xChekPlus will assign the code by copying the name. See more detailed information in "Matching codes and names" below.
Veterinarian Name	Veterinarian name If you are importing veterinarian IDs or codes without names, xChekPlus will assign the name by copying the code. See more detailed information in "Matching codes and names" below.

Matching codes and names

xChekPlus tracks **owners, complexes, growers, locations, sub-locations,** and **veterinarians** using **unique combinations of codes and names**.

An import mapper may include either a name field or a code field or both. If only one field is mapped, the mapper will automatically copy that information into the corresponding unmapped field in the database.

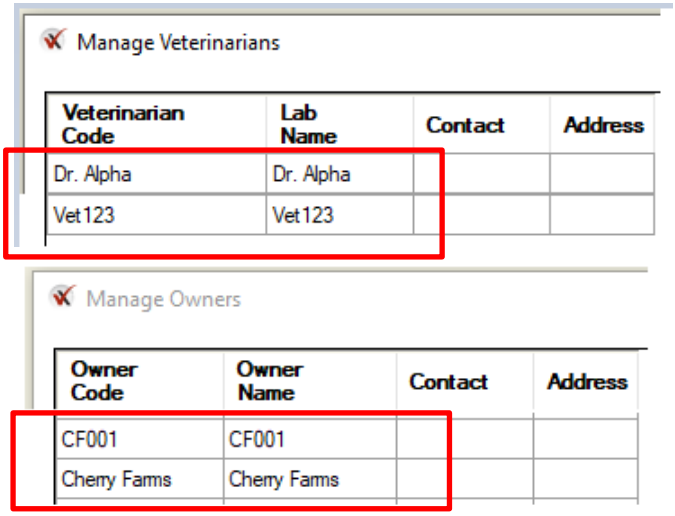
For example, if only the veterinarian code is mapped (and not the name), the veterinarian code will be entered into the Veterinarian Name field, as well, when data is imported. However, if the veterinarian code already exists in the database and a name is associated with it, the existing veterinarian name will be used in the Veterinarian Name field.

Example

Data to be imported (none of this information exists in the databases before import):

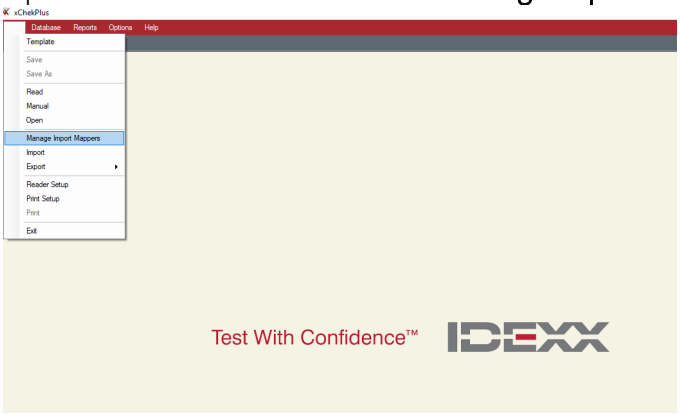
Case Number 1	Vet Name	Vet Code	Owner Name	Owner Code
1001	Dr. Alpha		Cherry Farms	
1002		Vet123		CF001

Database view after import:

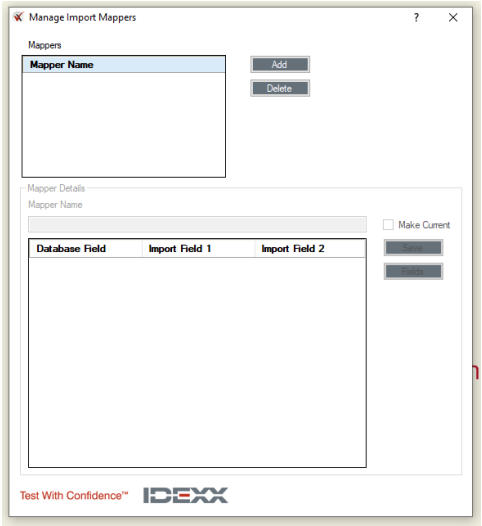


Creating the mapper

1. Open xChekPlus and select **File > Manage Import Mappers**.



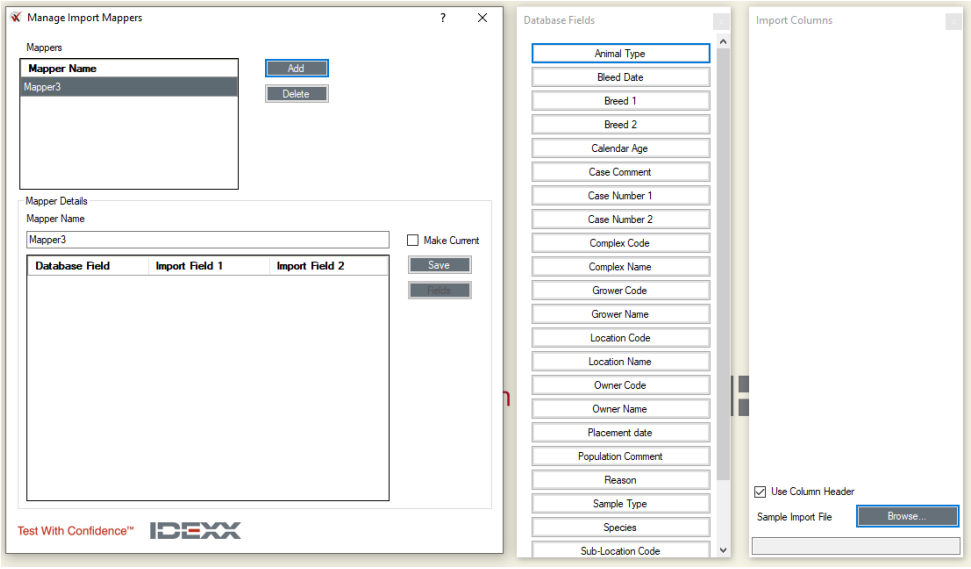
The first time you open the window, the mapper list will be empty:



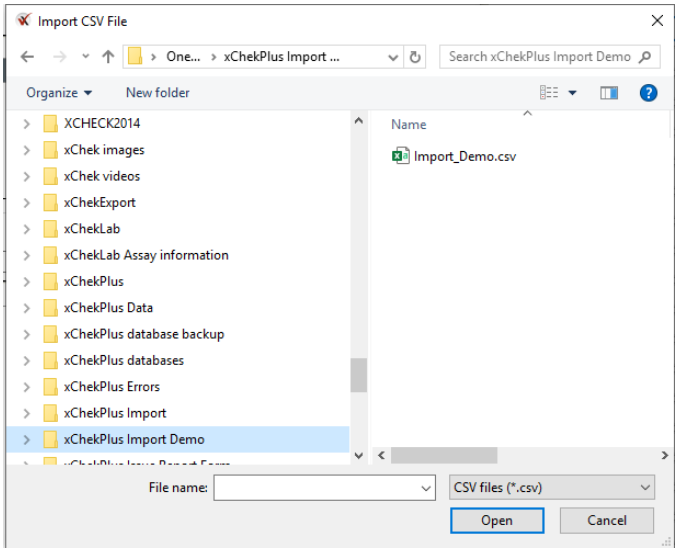
2. Click **Add**.

   xChekPlus creates a temporary name for the mapper and displays two windows:

   - A list of available xChekPlus database fields that can be imported, in alphabetical order
   - A blank Import Columns window



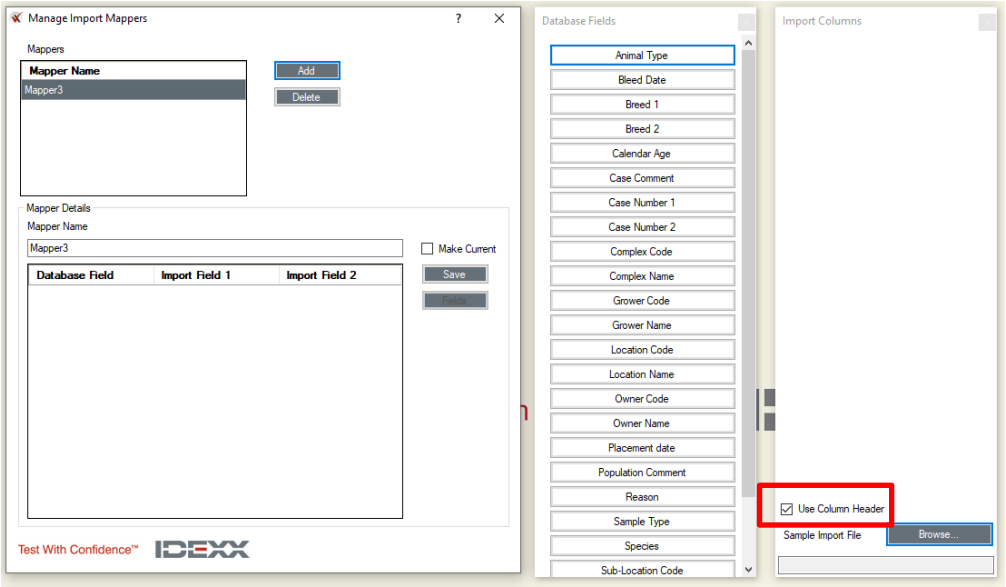
3. Click **Browse** and find the CSV file in your file system:



4. Select the file and click **Open**.

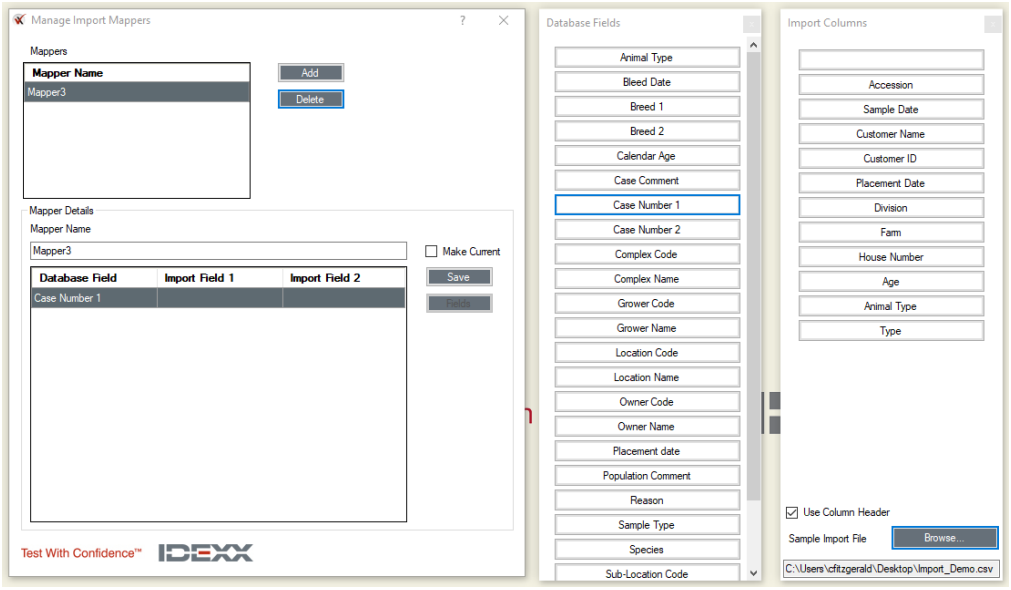
   The Import Columns window now displays the columns from your file.

5. If your file has column headers, click the **Use Column Header** option near the bottom.

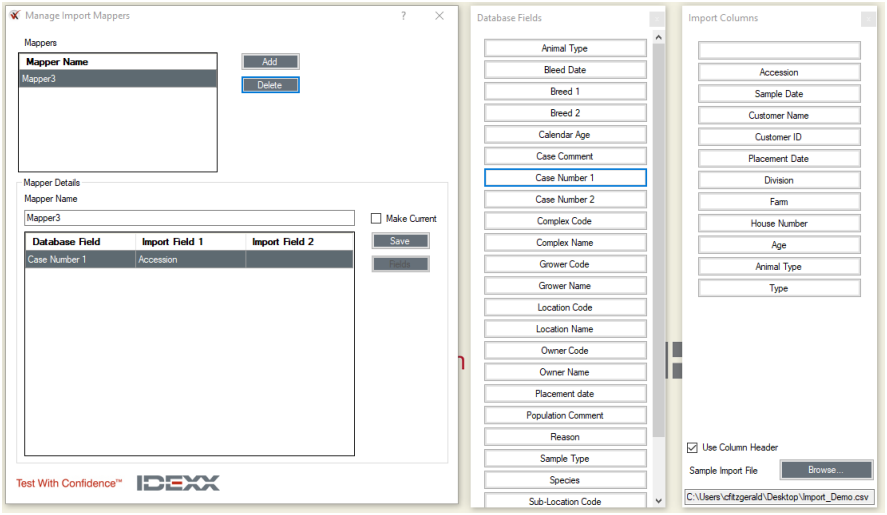


You are now ready to build your mapper.

6. Click on a field in the Database Fields list, and drag it to the **Database Field** column in the Mapper Details area on the left.

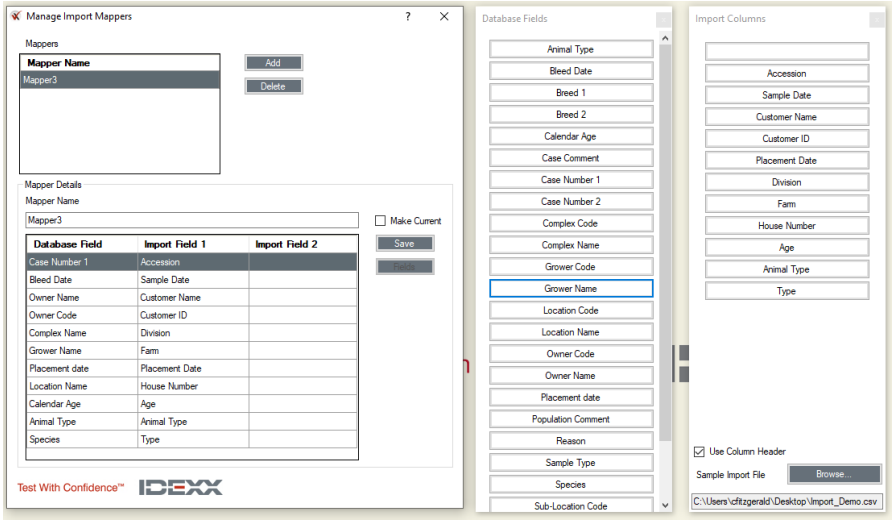


7. Click on the matching item in the Import Columns list, and drag it to the **Import Field 1** column in the Mapper Details area.

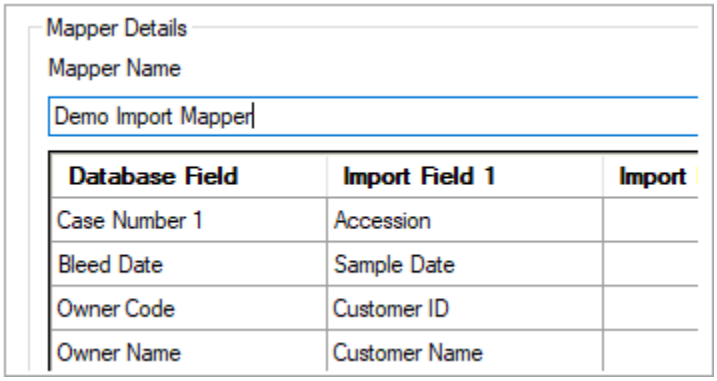


Note: Always place items from your import file into Import Field 1. Import Field 2 is used only to calculate age; see the "Calculating age" section below for more information.

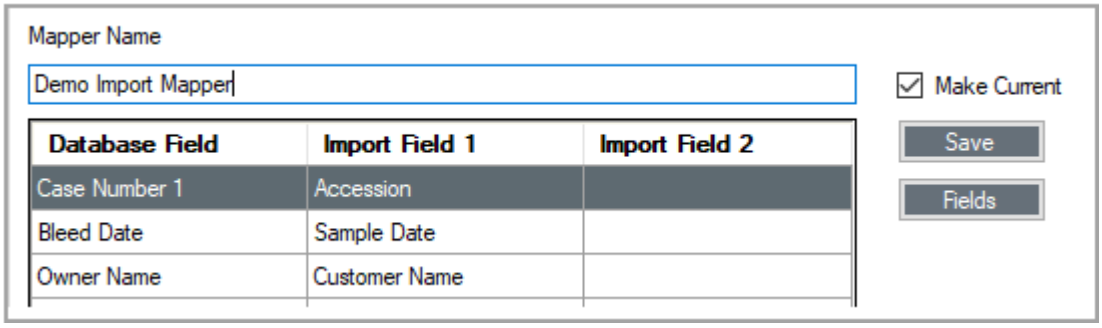
8. Continue dragging database fields and matching import columns until you add and match all the fields you want to import.



9. Enter a name for your mapper.



10. To activate this mapper, click the **Make Current** check box. This tells xChekPlus to use this mapper the next time you import case information.



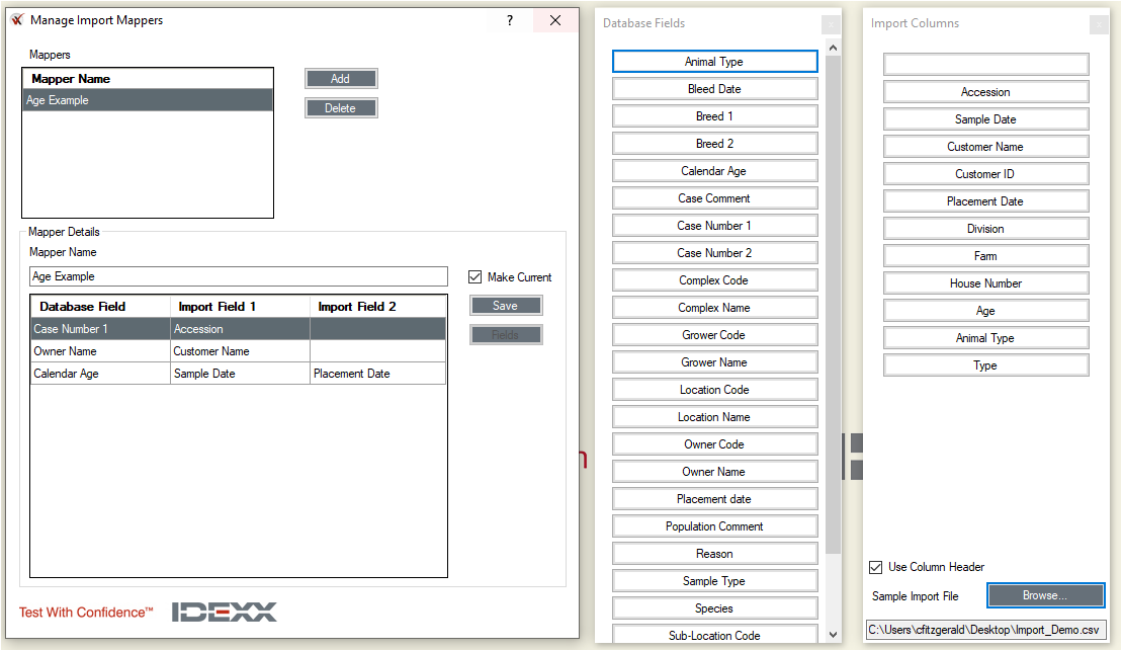
11. Click **Save**.
12. If you need to import information from files that have different formats than the one you just used, repeat the steps above to create mappers for those file formats as well.

Calculating age

You may set up the mapper so that xChekPlus will calculate calendar age when you import data:

- You must have both the Sample Date (or Bleed Date) and Placement Date values in your CSV file.
- The Sample Date/Bleed Date must be later than the Placement Date.
- Both the Sample Date/Bleed Date and Placement Date must be valid dates and in the same date format.

1. When creating the mapper, select **Calendar Age** from the Database Fields list and drag it to the Database Field column on the left.
2. Drag the Sample Date/Bleed Date import column into **Import Field 1**.
3. Drag the Placement Date import column into **Import Field 2**.

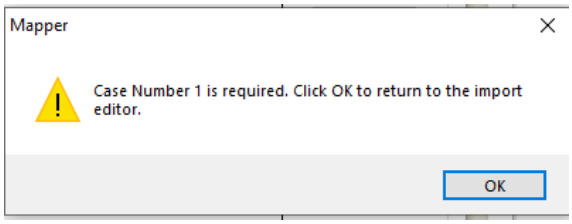


Mapper messages and errors

If there are errors in your mapper file you will see an error message when you attempt to save the file. Refer to the error message explanations below.

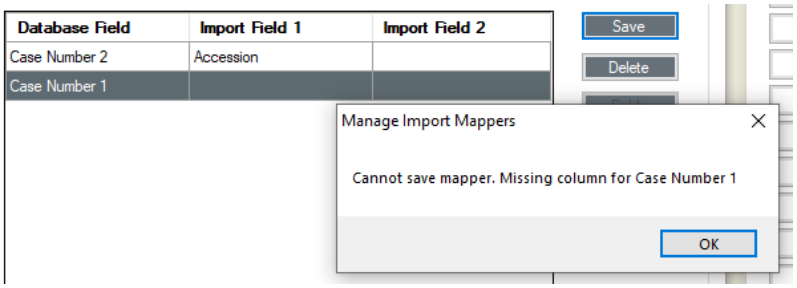
Case Number 1 is required

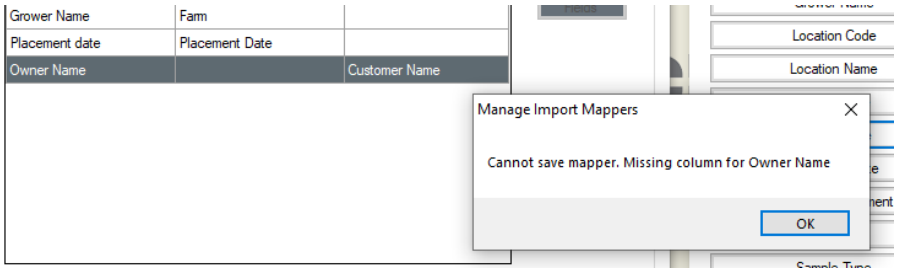
A mapper cannot be saved without a Case Number 1.



Cannot save mapper. Missing column

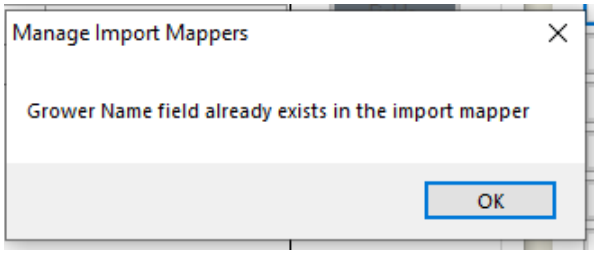
A matching Import Column is missing for the indicated Database Field or the match was placed in Import Field 2.





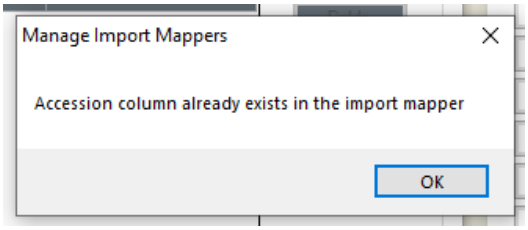
Field already exists

A database field already exists in the mapper. Duplicate database fields are not allowed.



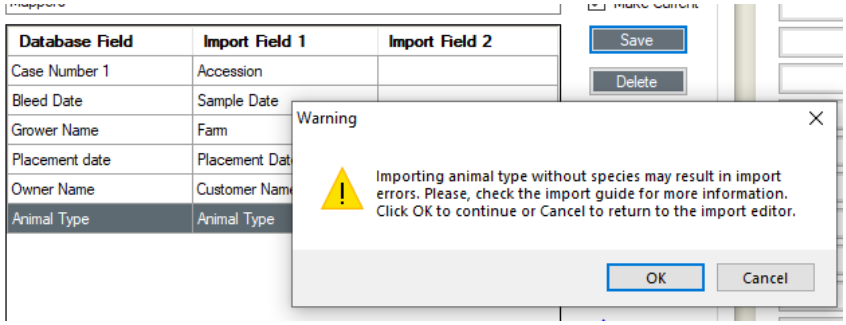
Column already exists

An import column being assigned to a database field was already assigned to another database field in the mapper. Duplicate matches are not allowed.



Importing an animal or breed without a species may result in import errors

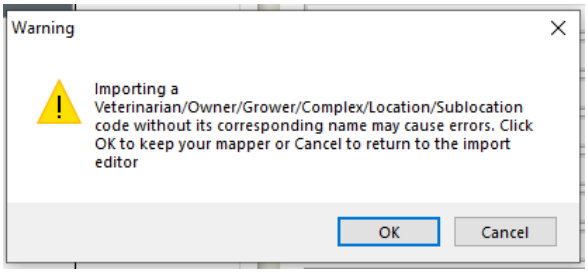
When importing animal type and/or breed, a matching species must be included in the import mapper. When the data is imported, the Species value must be one of these: Cattle, Chicken, Deer, Equine, Swine or Turkey.



Importing a code without a name

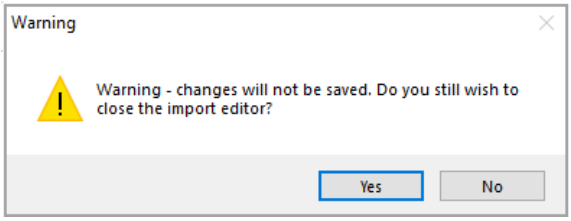
Applies to Veterinarian, Owner, Grower, Complex, Location, and Sub-Locations.

Importing a code without the corresponding name may cause errors. If the name/code combination does not already exist in the database, then it will default to Name=Code upon import. This is editable in the “Manage database” menu options. See “Matching codes and names,” above, for more information.



Warning - changes will not be saved

The mapper is not automatically saved when you close the window. If you close the window without saving, you will see this warning:



Import case information into a template, using the mapper

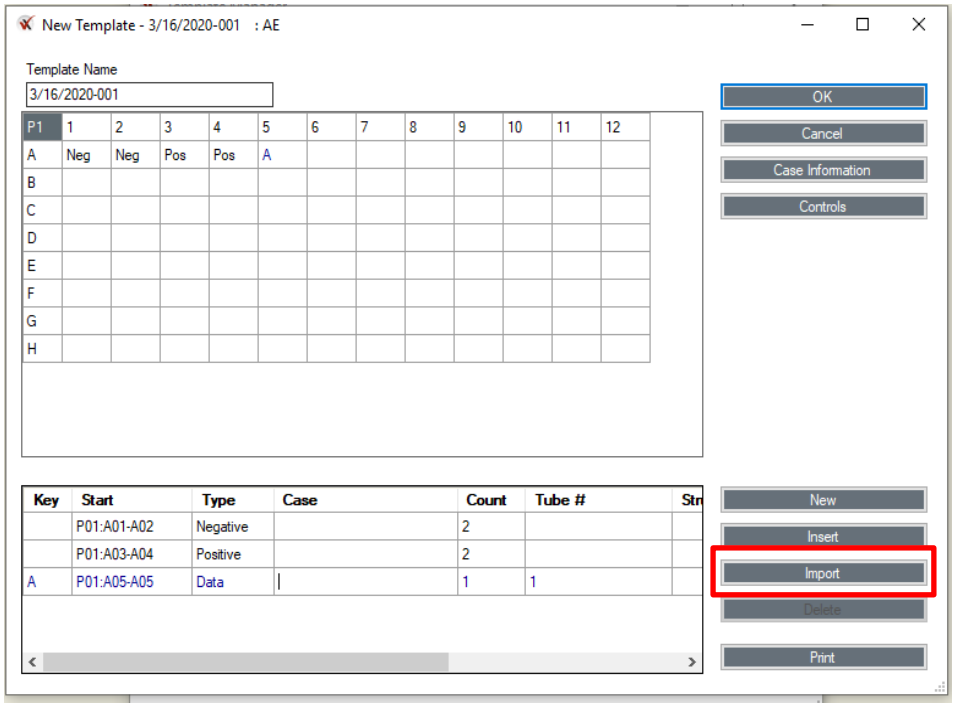
After you have created an import mapper, you can use it to import case information into a template.

Before you begin:

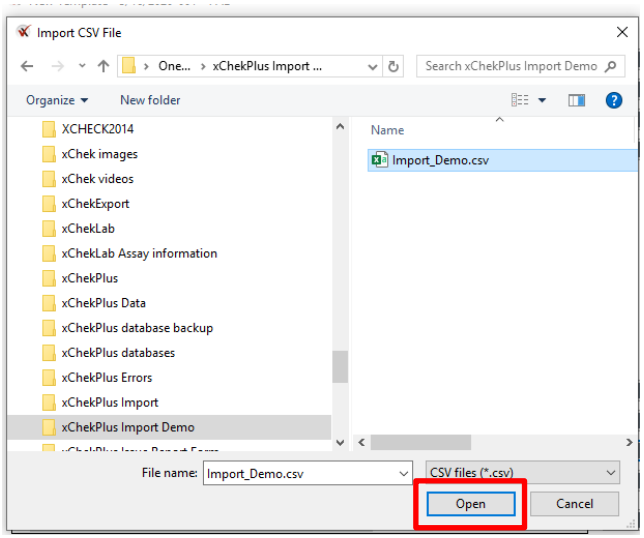
- Make sure the mapper you want to use is the active (current) mapper in the Manage Import Mappers window. The **Make Current** check box should be selected for the mapper.
- Make sure the data in your import file is accurate. Make any needed adjustments before importing the file.

To import case information:

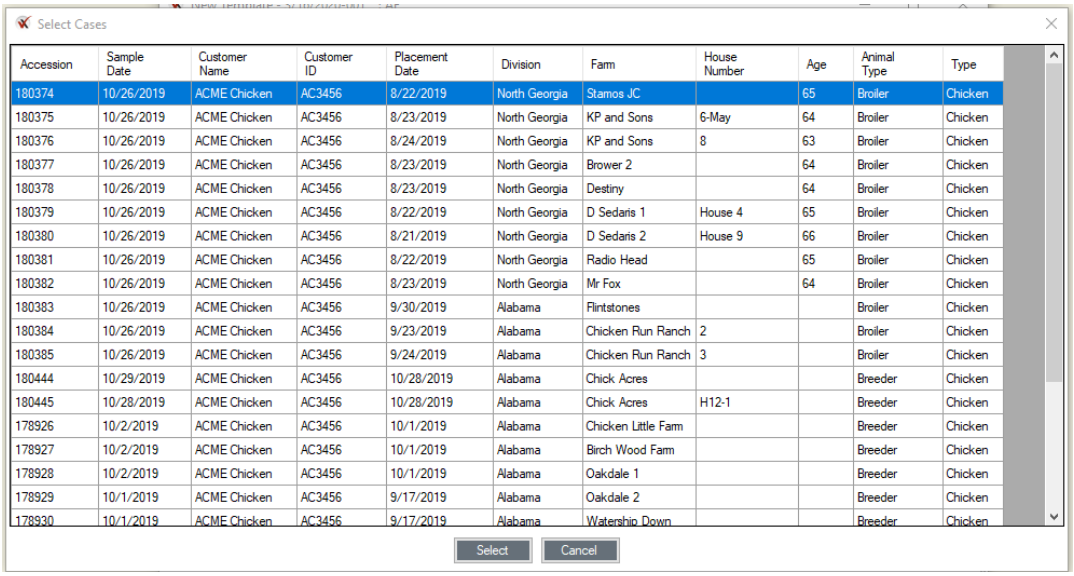
1. In xChekPlus, open the template editor and select a template to edit or create a new template. Note that an Import option is now available on the right.
2. Click **Import** to import cases into the template.



3. Find and select the CSV file containing information you want to import and click **Open**.

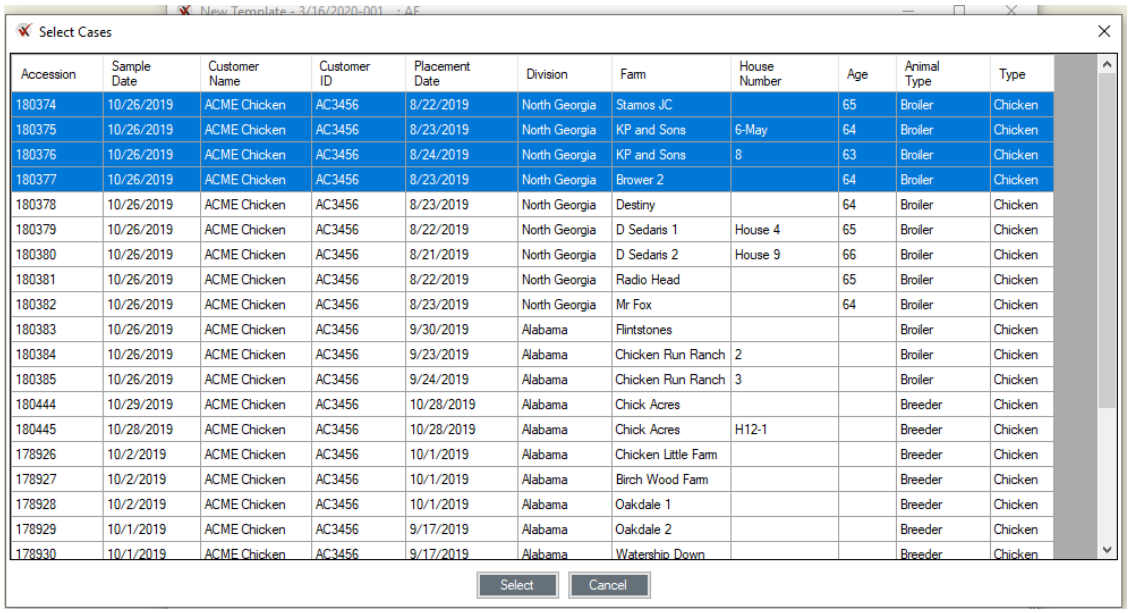


A window opens containing the contents of your CSV file.



Accession	Sample Date	Customer Name	Customer ID	Placement Date	Division	Farm	House Number	Age	Animal Type	Type
180374	10/26/2019	ACME Chicken	AC3456	8/22/2019	North Georgia	Stamos JC		65	Broiler	Chicken
180375	10/26/2019	ACME Chicken	AC3456	8/23/2019	North Georgia	KP and Sons	6-May	64	Broiler	Chicken
180376	10/26/2019	ACME Chicken	AC3456	8/24/2019	North Georgia	KP and Sons	8	63	Broiler	Chicken
180377	10/26/2019	ACME Chicken	AC3456	8/23/2019	North Georgia	Brower 2		64	Broiler	Chicken
180378	10/26/2019	ACME Chicken	AC3456	8/23/2019	North Georgia	Destiny		64	Broiler	Chicken
180379	10/26/2019	ACME Chicken	AC3456	8/22/2019	North Georgia	D Sedaris 1	House 4	65	Broiler	Chicken
180380	10/26/2019	ACME Chicken	AC3456	8/21/2019	North Georgia	D Sedaris 2	House 9	66	Broiler	Chicken
180381	10/26/2019	ACME Chicken	AC3456	8/22/2019	North Georgia	Radio Head		65	Broiler	Chicken
180382	10/26/2019	ACME Chicken	AC3456	8/23/2019	North Georgia	Mr Fox		64	Broiler	Chicken
180383	10/26/2019	ACME Chicken	AC3456	9/30/2019	Alabama	Flintstones			Broiler	Chicken
180384	10/26/2019	ACME Chicken	AC3456	9/23/2019	Alabama	Chicken Run Ranch	2		Broiler	Chicken
180385	10/26/2019	ACME Chicken	AC3456	9/24/2019	Alabama	Chicken Run Ranch	3		Broiler	Chicken
180444	10/29/2019	ACME Chicken	AC3456	10/28/2019	Alabama	Chick Acres			Breeder	Chicken
180445	10/28/2019	ACME Chicken	AC3456	10/28/2019	Alabama	Chick Acres	H12-1		Breeder	Chicken
178926	10/2/2019	ACME Chicken	AC3456	10/1/2019	Alabama	Chicken Little Farm			Breeder	Chicken
178927	10/2/2019	ACME Chicken	AC3456	10/1/2019	Alabama	Birch Wood Farm			Breeder	Chicken
178928	10/2/2019	ACME Chicken	AC3456	10/1/2019	Alabama	Oakdale 1			Breeder	Chicken
178929	10/1/2019	ACME Chicken	AC3456	9/17/2019	Alabama	Oakdale 2			Breeder	Chicken
178930	10/1/2019	ACME Chicken	AC3456	9/17/2019	Alabama	Watership Down			Breeder	Chicken

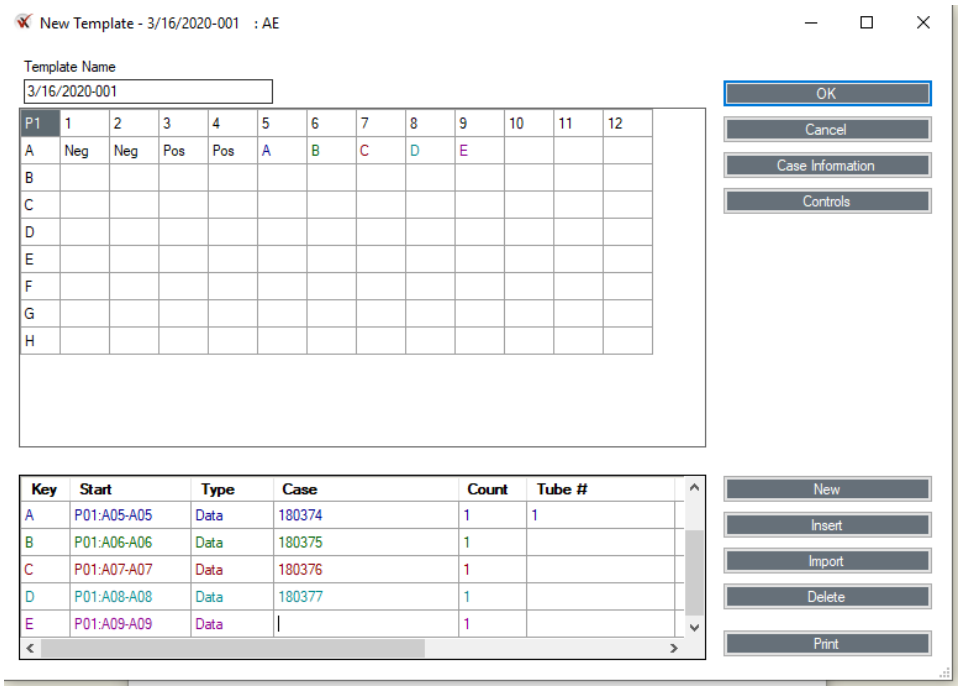
4. Highlight up to 20 case(s) you want to import and click **Select**.
Important: Import 20 or fewer cases at a time.



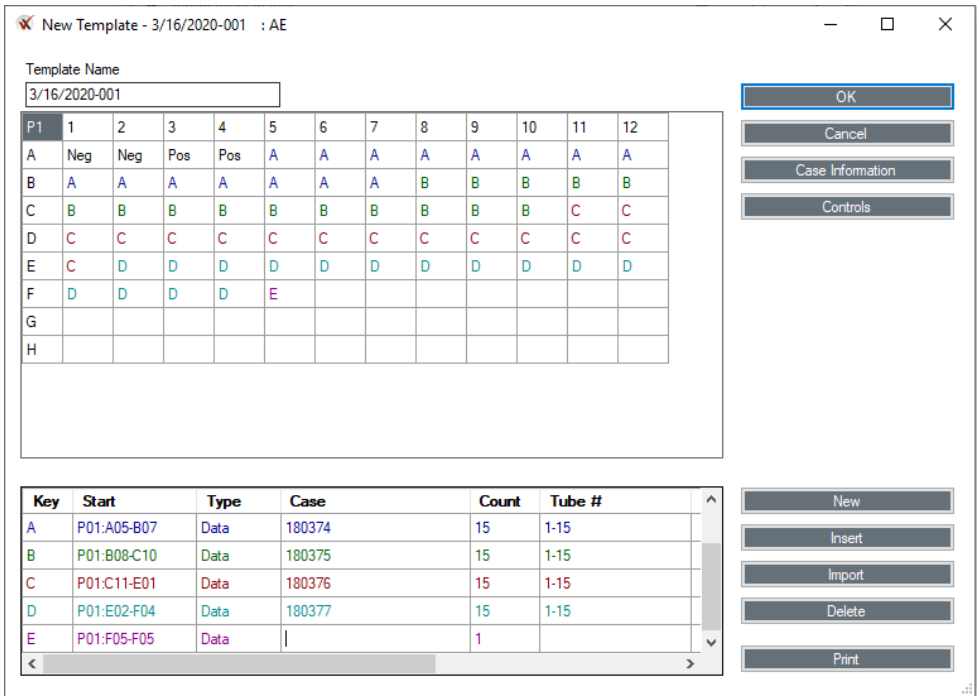
Note: You cannot change the data in your file at this point. If you need to make a change, click **Cancel**, open the CSV file, make any necessary edits, and then import the file again. Or you can edit the information after it has been imported into xChekPlus.

The selected cases are imported into your template.

Important: Each case is imported with a default count of 1.



5. Change the case counts as needed before importing additional cases.



P1	1	2	3	4	5	6	7	8	9	10	11	12
A	Neg	Neg	Pos	Pos	A	A	A	A	A	A	A	A
B	A	A	A	A	A	A	A	B	B	B	B	B
C	B	B	B	B	B	B	B	B	B	B	C	C
D	C	C	C	C	C	C	C	C	C	C	C	C
E	C	D	D	D	D	D	D	D	D	D	D	D
F	D	D	D	D	E							
G												
H												

Key	Start	Type	Case	Count	Tube #
A	P01:A05-B07	Data	180374	15	1-15
B	P01:B08-C10	Data	180375	15	1-15
C	P01:C11-E01	Data	180376	15	1-15
D	P01:E02-F04	Data	180377	15	1-15
E	P01:F05-F05	Data		1	

6. After adjusting the count for each case, import any additional cases at the end of the list.
7. (Optional) To insert a **single case** within the existing list, select the case **above** which you want to insert the new case, click **Insert**, and then click **Import**.
   Note: You can import only a single case when inserting. If you select multiple cases, only the last case in the selection will be inserted.

Review the import log

If any errors occur while you are importing cases, an log opens after the import is complete. The log shows which errors occurred in which records.

Refer to the list of possible import errors and causes below. When errors occur, you may choose to correct them in your import file and import those cases again, or you can correct them directly in xChekPlus.

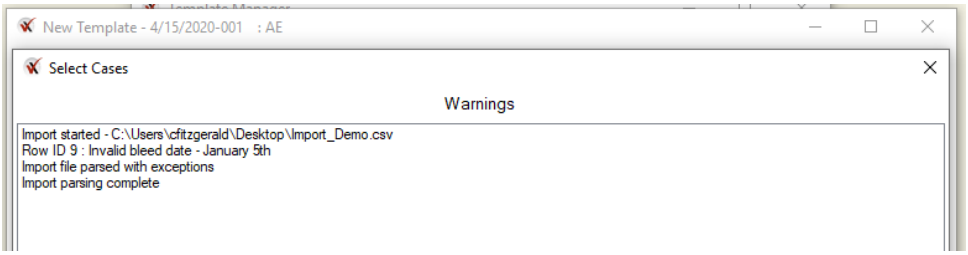
To save the log so you can correct the data later:

1. Click **Copy** at the bottom of the log.
2. Open an editing application such as Notepad, paste the contents, and save the file.

Error list

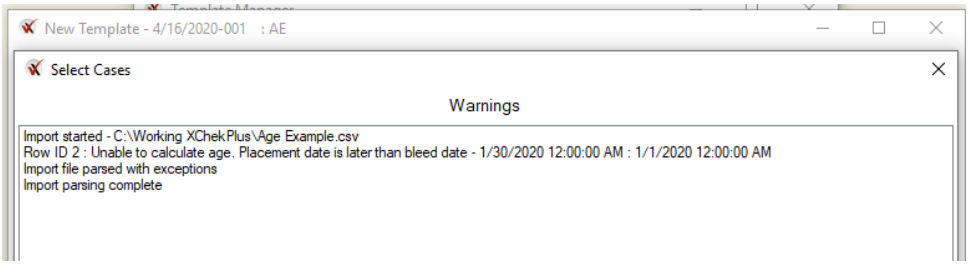
Invalid date format (Placement Date/Bleed Date fields)

The date will not be added to the case information. You will need to edit the file and reimport it, or manually edit the dates in the xChekPlus case information.



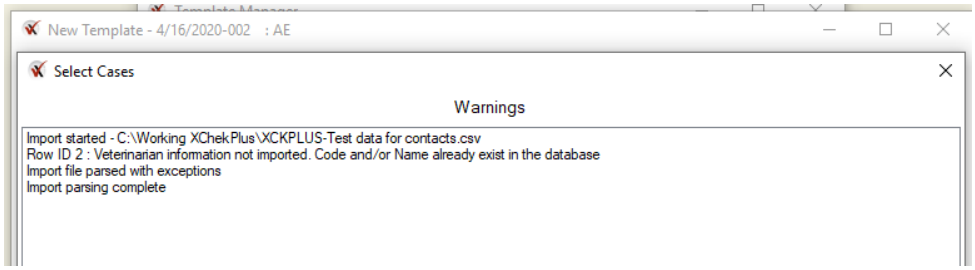
Placement date is greater than the sample/bleed date

This error occurs only if the mapper has been set up to calculate calendar age. If the placement date is greater than the sample/bleed date, the calendar age will not be calculated, but the placement date and sample/bleed dates will still be added to the case information.



Name/code mismatch

Applies to Veterinarian, Owner, Grower, Complex, Location, and Sub-Locations fields. The data imported does not match what currently exists in the database. The name will not be added to case information.



Species/Animal Type/Breed 1/Breed 2 mismatch

The data imported does not match a species, animal type, or breed currently in the Species table. The data cannot be added to the case information.

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