xChekPlus Case Import

User Manual Addendum



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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.

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.

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:

Case	Population	Ca
Case	lumber 1	
1234	6	
Case	lumber 2	P
		<u>O</u>
Vet		Jo
LM M	ller Lisa 🗸	Gr
Reaso	1	D
Monit	ring 🗸	
Calen	ar Age	
1-3		
Samp	е Туре	
Serur	~	
Bleed	Date	S
1/31	2020	
Comn	ent	C
		— I [
1		

Population Name			
Population 59			
Owner		Species	
Johnson Bros	~	Chicken	~
Grower		Breed 1	
Dakota Farms	~	Select	~
Complex		Breed 2	
Select	~	Select	~
Location		Animal Type	
Select	~	Breeders : AnimalType : Chicken	~
Sub Locations		Placement	
Select	\sim	M/d/yyyy	
Comment			

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				

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

đ	Α	B C D		E	F	G	Н	1	
	Accession	Age	Sample Date	Placement	Customer	Customer ID	Farm	Туре	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

4	Α	В	С	D	E	F	G	Н	1	
L	123546	15	2/1/2019	1/15/2019	ACME Chicken	AC123	Johnson's Acr	Breeder	Serum	
2	123547		1/31/2019	6/25/2018	Big Chicken Co.	BC345	Holly Acres	Breeder	Serum	
3	123548	210	2/1/2019		Big Chicken Co.	BC345	Elm Grove	Breeder		
4	123549	156	1/31/2019		Big Chicken Co.	BC345	Happy Orchar	Breeder		
5	123550	1	2/1/2019		Giant Poultry	GP597		Breeder		
5	123551	335	1/31/2019	3/2/2018	Giant Poultry	GP597	Farm A345		Serum	
7										

Tips for creating the import mapper and importing data

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

X	Manage Import Mappers	? ×		Da	tabase Fields			Import Columns		
Г	Mappers					[Animal Type	^		Test Case
	mapper Name		700			[Bleed Date			Case Number 1
ľ	Mapper2		Delete			[Breed 1			Bleed Date
						[Breed 2			Owner
						[Calendar Age			Owner Code
						[Case Comment			Placement Date
	Mapper Details					[Case Number 1			Complex
	Mapper Name					[Case Number 2			Location
	Import Demo			Make Current		[Complex Code			Sublocation
	Database Field	Import Field 1	Import Field 2	Save		[Complex Name			Calendar Age
	Case Number 1	Case Number 1		Fields		[Grower Code			Animal Type
	Bleed Date	Bleed Date				Ĩ	Grower Name			Species
	Owner Name	Owner				ĥ	Leastian Cade			oposio
	Owner Code	Owner Code				- ķ	Location code			
	Placement date	Placement Date				_ [Location Name			
	Complex Name	Complex				[Owner Code			Case Number 2
	Location Name	Location			1	ſ	Owner Name		н	Case Comment
	Sub-Location Name	Sublocation				ĥ	Discourse data			
	Calendar Age	Calendar Age				ļ	Placement date			Population Comment
	Animal Type	Animal Type					Population Comment			Vet Name
	Species	Species				[Reason			I like Column Header
				J		[Sample Type			
т	est With Confidence™	IDEXX				[Species			Sample import file browse
					Л,	_	Sub-Location Code	~		C:\Users\cfitzgerald\Desktop\Import_Demo.csv

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 conving 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.
	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.
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 hames' 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	Veterinarian name
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):

5				-		
	Case Number 1	Vet Name	Vet Code	Owner Name	Owner Code	(
	1001	Dr. Alpha		Cherry Farms		
	1002		Vet123		CF001	

Database view after import:

ſ	Manage Veterin	arians			
	Veterinarian Code	Lab Name	С	ontact	Address
	Dr. Alpha	Dr. Alpha			
	Vet123	Vet123			
5					

Manage Owners

Owner Code	Owner Name	Contact	Address
CF001	CF001		
Cheny Farms	Cherry Farms		

Creating the mapper

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

Tenjata Sera /a Sera /a Rad Maval Com Com Com Reage Intot Mappen Tenjat Sept	Database Reports Options Help		
Siva Sixa Aa Read Maruad Soom Maruag Mundus Sopat Aa Nadad Salup Yind Sop	Template		
Nead Sama Aa Mead Marsal Som Marsal Magnem raport Saport on James Magnem Yer Shap Yer Shap	Save		
kad dwal bon Toot Gaodr Satap Her Satap	Save As		
Arrual Varial Va	Read		
tem from Agent and Agent a	Aanual		
Marque fonds (Maport moto) Goot • Nador Setup Mrt - Su	Open		
root stap Jood bins bins bins bins bins bins bins bins	Manage Import Mappers		
ispot • • Constraints of the second s	mport		
Rooff Stup Prif Stup Prif Stup St	Export +		
Ver Salap Ver t Sal	Reader Setup		
Sa Sa	Print Setup		
Ext	Print		
	Ext		
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		lest with Confidence."	
Test With Confidence™			
Test With Confidence™			

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

Manage Import Mappe	rs		? ×
Mappers			
Mapper Name		Add	
		Delete	
Mapper Details			
Mapper Name			
			Make Current
Database Field	Import Field 1	Import Field 2	Save
			Fields

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

 Manage Import Mappers	? >		D	atabase Fields	×	Import Columns 🔹
Mappers				Animal Type	^	
Mapper Name Add				Bleed Date		
Delete Delete				Breed 1		
				Breed 2		
				Calendar Age		
				Case Comment		
Mapper Details				Case Number 1		
Mapper Name				Case Number 2		
Mapper3	Make Current			Complex Code		
Database Field Import Field 1 Import Field 2	Save			Complex Name		
	Fields			Grower Code		
				Grower Name		
				Location Code		
				Location Name		
				Owner Code		
				Owner Name		
				Placement date		
				Population Comment		
				Reason		I Ura Column Hander
				Sample Type		Crawle larget Fig. Resume
Test With Confidence'				Species		Sample import file browse
		_		Sub-Location Code	¥	

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

🕷 Import CSV File	×
← → ~ ↑ 🛄 > One > xChekPlus Import	✓ Ö Search xChekPlus Import Demo ク
Organize 🔻 New folder	111 🕶 🔳 🖓
> . XCHECK2014	^ Name ^
> 📴 xChek images	🕼 Import Demo.csv
> 📴 xChek videos	
> 📙 xChekExport	
> 🛃 xChekLab	
> 📙 xChekLab Assay information	
> 📙 xChekPlus	
> 📙 xChekPlus Data	
> 📙 xChekPlus database backup	
> 📙 xChekPlus databases	
> 🛃 xChekPlus Errors	
> 📙 xChekPlus Import	
> 📙 xChekPlus Import Demo	
S Challeblas Issue Dans & Farms	× *
File name:	✓ CSV files (*.csv)
	Open Cancel

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.

🕷 Manage Import Mappers	? ×	Database Fields s Import Columns s
Mapper Name Add Mapper 3 Delete		Animal Type Bleed Date Breed 1 Breed 2 Calendar Age Case Comment
Mapper Details Mapper Name Manoer3	Make Current	Case Number 1 Case Number 2 Construction
Database Field Import Field 1 Import Field 2	Save	Complex Name Grower Code
		Grower Name Location Code
		Owner Code Owner Name
		Placement date Population Comment
		Reason Sample Type Sample Type Sample Type Sample Import File Browse
Test With Confidence [™]		Sub-Location Code

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.

🕷 Manage Import Mappers	? ×	D	atabase Fields	×	Import Columns ×
Mappers Add			Animal Type	^	
Mapper3 Delete			Bleed Date		Accession
			Breed I		Sample Date
			Breed 2		Customer Name
			Calendar Age		Customer ID
			Case Comment		Placement Date
Mapper Details			Case Number 1		Division
Mapper Name			Case Number 2		Farm
Mapper3	Make Current		Complex Code		House Number
Database Field Import Field 1 Import Field 2	Save		Complex Name		Age
Case Number 1	Fields		Grower Code		Animal Type
			Grower Name		Туре
			Location Code		
			Location Name		
			Owner Code		
		1	Owner Name		
			Placement date		
			Population Comment		
			Reason		
]		Sample Type		Use Column Header
Test With Confidence™			Species		Sample Import File Browse
			Sub-Location Code	~	C:\Users\cfitzgerald\Desktop\Import_Demo.csv

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.

Manage Import Mappers	? ×	D	atabase Fields		Import Columns
Mappers			Animal Type	^	
Mapper Name Add			Bleed Date]	Accession
Delete			Breed 1		Sample Date
			Breed 2]	Customer Name
			Calendar Age]	Customer ID
			Case Comment]	Placement Date
Mapper Details			Case Number 1		Division
Mapper Name			Case Number 2]	Fam
Mapper3	Make Current		Complex Code]	House Number
Database Field Import Field 1 Import Field 2	Save		Complex Name		Age
Case Number 1 Accession	Fields		Grower Code]	Animal Type
			Grower Name		Туре
			Location Code]	
			Location Name]	
			Owner Code		
		•	Owner Name		
			Placement date		
			Population Comment		
			Reason		Ci Una Calvara Mander
]		Sample Type		C I L I I CI
Test With Confidence"			Species		Sample import Hie Browse
			Sub-Location Code	~	C:\Users\cfitzgerald\Desktop\Import_Demo.csv

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.

Manage Import Mapp	ers		?	×	D	atabase Fields		Import Columns
Mappers						Animal Type	î	
Mapper Name Mapper3		Add				Bleed Date	1	Accession
happero		Delete				Breed 1		Sample Date
						Breed 2		Customer Name
						Calendar Age		Customer ID
						Case Comment		Placement Date
Mapper Details						Case Number 1		Division
Mapper Name						Case Number 2		Farm
Mapper3			Make Cur	rent		Complex Code		House Number
Database Field	Import Field 1	Import Field 2	Save			Complex Name		Age
Case Number 1	Accession		Fields	C		Grower Code	1	Animal Type
Bleed Date	Sample Date					Grower Name	1	Type
Owner Name	Customer Name		_			Location Code		
Owner Code	Customer ID		_					
Complex Name	Division		_			Location Name		
Grower Name	Farm					Owner Code		
Placement date	Placement Date		_			Owner Name		
Location Name	House Number		_			Placement date		
Calendar Age	Age		_					
Animal Type	Animal Type		_			Population Comment		
Species	Туре		_			Reason		Cel Line Column Handen
						Sample Type	1	
est With Confidence"						Species	1	Sample Import File Browse
						Sub-Location Code	v	C:\Users\cfitzgerald\Desktop\Import_Demo.c

9. Enter a name for your mapper.

Mapper Details		
Mapper Name		
Demo Import Mapper		
Database Field	Import Field 1	Import
Case Number 1	Accession	
Bleed Date	Sample Date	
Owner Code	Customer ID	
Owner Name	Customer Name	

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.

Mapper Name			
Demo Import Mapper			Make Currer
Database Field	Import Field 1	Import Field 2	Save
Case Number 1	Accession		Fields
Bleed Date	Sample Date		
Owner Name	Customer Name		

- 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.

🕷 Manage Import Mappe	rs		? ×	1	Database Fields	×	Import Columns ×
Mappers					Animal Type] ^	
Age Example		Add			Bleed Date		Accession
		Delete			Breed 1		Sample Date
					Breed 2]	Customer Name
					Calendar Age		Customer ID
					Case Comment		Placement Date
Mapper Details					Case Number 1		Division
Mapper Name					Case Number 2		Farm
Age Example			Make Current		Complex Code		House Number
Database Field	Import Field 1	Import Field 2	Save		Complex Name		Age
Case Number 1	Accession		Fields		Grower Code		Animal Type
Owner Name	Customer Name	Placement Date	-		Grower Name		Туре
	Sample Date	Thatement Date			Location Code		
					Location Name		
					Owner Code		
				1	Owner Name		
					Placement date		
					Population Comment		
					Reason		
					Sample Type		Use Column Header
Test With Confidence™	IDEXX				Species		Sample Import File Browse
					Sub-Location Code	~	C:\Users\cfitzgerald\Desktop\Import_Demo.csv

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.

Database Field	Import Field 1		Import Field 2	Save
Case Number 2	Accession			Delete
Case Number 1				
		Man	age Import Mappers	×
		Ca	nnot save mapper. Missing	g column for Case Number 1
				ОК

Grower Name	Farm			rieias	arona nano
Placement date	Placement Date				Location Code
Owner Name		Customer Name			Location Name
			Mana	age Import Mappers	Jmn for Owner Name e
					OK

Field already exists

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

Manage Import Mappers	×
Grower Name field already exists in the import mapper	
ОК	

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.

mappero					
Database Field	Import Field	11	Import Field 2	Save	
Case Number 1	Accession			Delete	
Bleed Date	Sample Date				
Grower Name	Farm	Warning			×
Placement date	Placement Da	t			
Owner Name	Customer Nam		errors. Please, check the i	thout species may result in impo import guide for more informatio	rt on.
Animal Type	Animal Type		Click OK to continue or C	ancel to return to the import edi	tor.
				OK Can	cel

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		×
	Importing a Veterinarian/Owner/Grower/Complex/Location/Sublocation code without its corresponding name may cause errors. Click OK to keep your mapper or Cancel to return to the import editor	
	OK Cancel	

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:



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.

3/16	/2020-0	001													ОК		
P1	1	2	3	4	5	6	7	8	9	10	11	12			Cance	ł	
A	Neg	Neg	Pos	Pos	А										0 1 (
3															Case Inform	nation	
С															Contro	ls	
D																	
E																	
F																	
G																	
G H													_				
G H	Sta	art		Туре	C	356			Coun	t T	ube #		Str	_	New		
G H Key	Sta P01	art ::A01-A02	2	Type Negative	C	ase			Count 2	t T	ube #		Str	_	New		
G H Key	Sta P01: P01:	art :A01-A02 :A03-A04	2	Type Negative Positive	Ci	ase			Count 2 2	t T	ube #		Str		New		

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.

🕷 Select Ca	ses									
Accession	Sample Date	Customer Name	Customer ID	Placement Date	Division	Fam	House Number	Age	Animal Type	Туре
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.

🔨 Select Ca	ases 🕺	New Template -	3/16/2020-001	: AF					_	X	>
Accession	Sample Date	Customer Name	Customer ID	Placement Date	Division	Farm	House Number	Age	Animal Type	Туре	
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	
178929	10/1/2019	ACME Chicken	AC3456	9/17/2019	Alabama Alabama Select Ca	Vakdale 2 Watership Down			Breeder	Chicken	

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.

🕅 Ne	w Tem	plate - 3	3/16/20	20-001	: AE									_		×
Temp	late Nar	ne														
3/16	/2020-0	01												OK		
P1	1	2	3	4	5	6	7	8	9	10	11	12		Canc	el	
А	Neg	Neg	Pos	Pos	А	А	А	А	А	А	А	А		Cara lafar		
В	А	Α	А	А	А	А	Α	В	В	В	В	В		Case Infon	mation	
С	В	В	В	В	В	В	В	В	В	В	С	С		Contro	ols	
D	С	С	С	С	С	С	С	С	С	С	С	С				
E	С	D	D	D	D	D	D	D	D	D	D	D				
F	D	D	D	D	E											
G																
н																
Кеу	Sta	ırt		Туре	C	ase			Cour	nt 1	ube #		^	New	1	
А	P01:	A05-B07	7	Data	18	0374			15	1-	15			Inser	+	
В	P01:	B08-C10)	Data	18)375			15	1-	15			- maci		
С	P01:	C11-E01		Data	18	0376			15	1-	15			Impo	rt	
D	P01:	E02-F04		Data	18	0377			15	1-	15			Delet	e	
E	P01:	F05-F05		Data					1				~			
														Print		

- 6. After adjusting the count for each case, import any additional cases at the end of the list.
- (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.

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.

🕷 New Template - 4/15/2020-001 : AE	-	×
🔏 Select Cases		×
Warnings		
Import started - C:\Users\cftzgerald\Desktop\Import_Demo.csv Row ID 9 : Invalid bleed date - January 5th		
Import me parsed with exceptions Import parsing complete		

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.

_	V Template Manager	V	
	🕷 New Template - 4/16/2020-001 : AE	_	\times
	🕷 Select Cases		×
	Warnings		
	Import started - C:\Working XChek Plus \Age Example.csv Row ID 2 : Unable to calculate age. Placement date is later than bleed date - 1/30/2020 12:00:00 AM : 1/1/2020 12:00:00 AM Import file parsed with exceptions Import parsing complete		

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.

	 _	×
😿 Select Cases		×
Warnings Import started - C:\Working XChek/Plus\XCKPLUS-Test data for contacts.csv Row ID 2 : Veterinarian information not imported. Code and/or Name already exist in the database Import file parsed with exceptions Import parsing complete	 	

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.

X Select Cases		×
	Warnings	
Import started - C:\Users\cftzgerald\Desktop\Import_Demo -(Row ID 1 : Species not imported. Imported species does not m Row ID 1 : Imported Species does not match available options Row ID 1 : Imported Species does not match available options Import file parsed with exceptions Import parsing complete	Copy.csv atch available options. . Unable to import Animal Type/Breed without Species . Unable to import Animal Type/Breed without Species	

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