

Client Resource

Importing Animal Records



Introduction

The purpose of this tip sheet is to walk you through the steps of importing multiple animals to your bioTrack+ account from a spreadsheet.

Before importing animal records, it is *strongly* recommended that you read the tip sheet on **Adding Animals** and manually enter a few animals so that you are comfortable with the fields and criteria.

IMPORTING ANIMAL RECORDS 1

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|--------------------------------|---|
| INTRODUCTION | 1 |
| STEPS TO IMPORT ANIMAL RECORDS | 1 |
| ACCESSING IMPORT TEMPLATES | 2 |
| CREATING IMPORT FILES | 3 |
| MAPPING IMPORT FILES | 4 |
| UNDERSTANDING LOOKUP FIELDS | 5 |
| TRACKING IMPORT PROGRESS | 6 |
| TROUBLESHOOTING IMPORTS | 9 |

Steps to Import Animal Records

- Sign into your bioTrack+ Account.
- Before you can import animals, you must first ensure that the Location of the animals and Birth Season / Birth Management Group are in the system.
- Using the left navigation menu, navigate to the **'Animals'** tab.
- This will bring you to a summary screen with existing animals in your inventory.
- Before you can import animals, you need to prepare a CSV file with the required data formatting. See the sections on **'Accessing Import Templates'** and **'Creating Import Files'** below for more information.
- On the top navigation ribbon, look for the button called **'Import from CSV'** (you may need to click the 'More' button (3 Dots on the far right of the ribbon) to find this option).

- This will pull up a panel where you will fill in the details to import the file.
- Select '**Choose File**' to browse for the file you want to upload, when you have selected the file, click '**Next**'.
- On the next page, use the '**Alternate Key**' drop down to select the Primary ID for your account. This would be based on how you asked for your account to be originally setup. If you are unsure what this is, contact the office. The options include Ear-Tag (System), Bio ID and RFID. This ID type must be unique.
- Select '**Review Mapping**' to map the columns of your file to the names for the columns in the system. See '**Mapping Import Files**' for more information.
- When all of the columns have been properly mapped (all should have a green check beside them or a list icon), select '**Finish Import**' to start the import job.
- If you select '**Track Your Progress**' on the pop-up it will bring you to the '**My Imports**' tab to view the progress of your import.
 - You can also access '**My Imports**' from the Master Data section of the left navigation bar at any time.
 - The import job will run in the background, so you can continue to use bioTrack Plus while the file is importing.

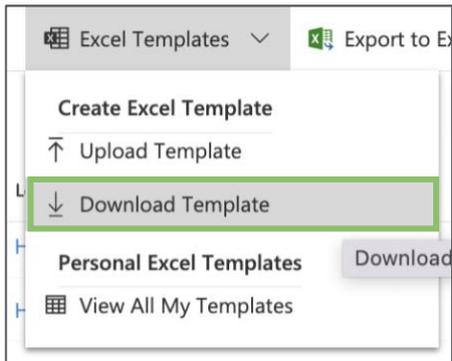
Accessing Import Templates

There are import templates available for the main events in the system. To download an import template:

- Navigate to the '**Animals**' tab in the left navigation pane.
- In the top navigation bar, select '**Excel Templates**' and then '**Download Template**'.
- This will bring a pop up where you need to select the 'Entity' (e.g., Animals) and 'View' you want to download (look for the view called TEMPLATE). It will automatically select your default view.

- Select '**Download**' to Download the template to Excel, or '**Edit Columns**' to customize the template based on the data you want to import.

The import templates are formatted so that the columns, drop down list options and validation rules for the column are followed, which may make it easier to import records when you are learning the system.

A screenshot of a 'Download Template' dialog box. The dialog has a title bar with a close button (X). Below the title, it says 'Create excel template from Dynamics 365 data by downloading excel file'. There are two dropdown menus: 'Entity' with 'Animals' selected, and 'View' with 'Add Animal - Basic (TEMPLATE)' selected. At the bottom right, there are two buttons: 'Download' and 'Edit Columns'.

Creating Import Files

- Start by opening an existing Excel or CSV file from your own records or RFID reader.
- Ensure all required fields are added to this file (e.g., IDs, species, category, breed, birth information). For a full list of required fields, please see the '**Adding Animals**' tip sheet.
- The columns do not need to be in a specific order and you can map the drop-down list items when you map the file.
- Save the file as a CSV.
- Follow the **Steps to Import Animal Records** above.

Pro Tip: If you name your columns and the values for the drop down lists the same as what the system expects, you will save yourself some time as the system will automatically map your columns.

Pro Tip: You Can “Name Your Map” to save the mapping in the future. Change the “Name My Map” name *before* you begin mapping the columns. Please be aware that for the mapping to work correctly in the future, all column names and drop-down list items must be exactly the same.

Mapping Import Files

Importing files in bioTrack Plus is quite simple once you understand the process of mapping files. On the mapping screen, all fields that have not been mapped will have a red symbol  , once a field has been properly map it will be replaced with a green check mark  .

There are 5 types of fields to map:

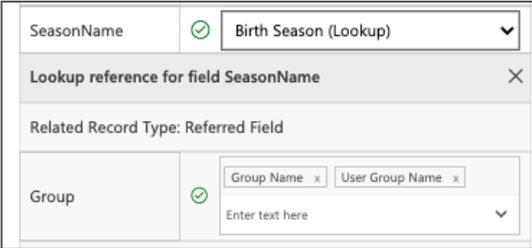
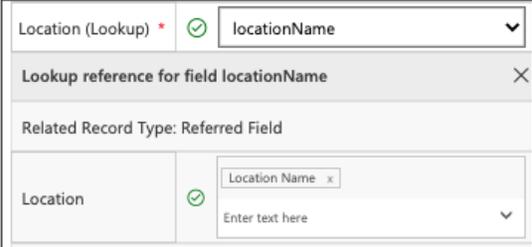
1. **Numeric Fields** (e.g., RFID) – To map these fields, you only need to ensure you have selected the correct column name in your import file.
2. **Character Fields** (e.g., Ear-Tag) – To map these fields, you only need to ensure you have selected the correct column name in your import file.
3. **Date Fields** (e.g., Birth Date) – To map these fields, ensure all dates are in the same unambiguous format. The import tool is quite robust and can recognize many formats as long as all dates are consistent and it can identify the pieces of the date.
4. **Drop-Down Lists** – To map these files, first select the correct column. Then you will see a list of all the unique options in your import file. Ensure the correct value is selected and each has a green check beside it before selecting okay to finish mapping the file.
5. **Lookup Fields** (e.g., Sire ID, Dam ID, Location, Birth Season) – Lookup fields search for matching values in the database. To map these fields, you need to first ensure that the value it is looking up to is already in the database or you will receive an error. Next, select the correct column from the list. Finally, you need to type in which column it should be using to look for the matching value and then hit okay to finish mapping the column. More explanation is provided below in the **Understanding Lookup Fields** section.

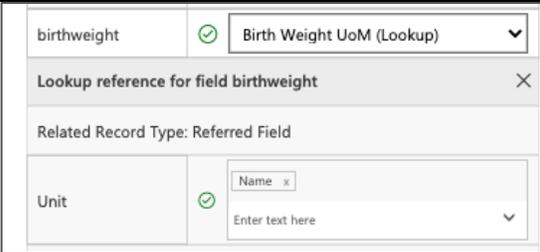
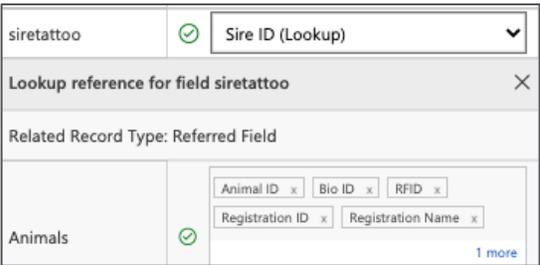
Once you have verified that all fields have green checkmarks and are mapped correctly, click **‘Finish Import’** to submit the file for import.

Understanding Lookup Fields

Incorrect mapping of lookup fields is one of the most common causes of file import errors, so having a basic understanding of lookups will greatly speed up the process of importing files. The table below explains the most common types of lookup fields and options for columns to map to them.

The most common error related to lookup fields is “the lookup could not be resolved”. This means that either the value is not in the system, or you have not indicated the right column when mapping the file. To troubleshoot this error, try searching for the value in bioTrack Plus to ensure it is in the database.

| Lookup Type | Mapping |
|--|--|
| Groups (Birth Season, Mirth Management, Weighing etc.) | <p><i>Group Name</i> – If you select this option, your group name must be in the following format <i>Group Name – Account Name</i> (e.g., 2023 Calves – Jane Farmer).</p> <p><i>User Group Name</i> – If you select this option, you can use any name you define as long as it is unique within your account (e.g., 2023 Calves).</p>  |
| Location | <p><i>Location Name</i> – This is the only option to map location, but make sure your locations are already in the system.</p>  |
| Unit (e.g., Birthweight UoM) | <i>Name</i> – Is the correct field to map for units. |

| | |
|--|---|
| |  |
| <p>Identities (e.g., Sire ID, Dam ID, Donor ID, Foster ID)</p> | <p><i>Animal ID</i> – This is the ID that is set as the default for your account and is the most commonly used lookup when importing pedigree information.</p> <p><i>Bio ID</i> – The Bio ID (Tattoo) of the animal.</p> <p><i>RFID</i> – The 15-digit RFID number for the animal.</p> <p><i>Registration ID</i> – The animal's registration number.</p> <p><i>Registration Name</i> – The animal's registration name.</p> <p><i>Ear-Tag System</i> – To use this option, you must ensure that your ear-tags are in the following format <i>Tag – Account Name</i> (e.g., 100K – Jane Farmer). You cannot import based on Ear-Tags alone as there may be duplicates.</p>  |

Tracking Import Progress

To see that status of a file import, you can click '**Track progress**' after finish imports or visit the '**My Imports**' page, which can be accessed from the '**Master Data**' section of the left navigation bar.

This lists all the files you have attempted to import for a certain period of time. For each file, there are statistics describing the '**Status Reason**' (what stage the import is at), '**Successes**' (successfully imported), '**Partial Failures**' (some of the information for the animal was not able to be imported), '**Failures**' and '**Total Processed**' (the number of records in the file).

There are 5 Stages to the Import Process:

1. **Submitted** – The file has been submitted for import.

2. **Parsing** – Checking to make sure the file is in the correct format and can be “read”
3. **Transforming** – Matching the values in the file based on your import mapping. Errors at this stage are typically caused by ‘lookup could not be resolved’
4. **Importing** – The file has been processed and the system is creating the new records.
5. **Completed** – The file is done being imported and you can check the status and resolve any errors.

To check which records were successfully imported or any errors present, click on the hyperlink for the file name. You can then navigate to the different tabs for Failures, Partial Failures and Successes.

The failures tab contains the following information:

1. **Sequence Number** – What order the row was imported.
2. **Log Phase** – The Stage of the import, as described above, where the error occurred
3. **Description** – The error that occurred.
4. **Column Heading** – The column that caused the import problem
5. **Column Value** – The specific value that caused the problem.
6. **Original Row Number** – The row number for the error row in the file.
7. **Source Row** – The row that caused the problem.
8. **Error Code** – This can be used by staff to troubleshoot the error.
9. **More Information** – The Error Description is “ISV Code Aborted the Operation”, the More information column will explain what data rule was failed that prevented importing the row.

To correct the mistakes causing the failures, select ‘**Export Error Rows**’, which will download only the animals that were not successfully imported. If you import with the same file, it would be more difficult to find the problems as you will receive additional error messages that it cannot import the animals already in the system due to duplicates.

BD_animals_13JAN2023.csv - Saved
Import Source File

General Failures Success Partial Failure Related

| | | | |
|------------|--------------------------|-------------|-----------|
| Name | BD_animals_13JAN2023.csv | Status | Submitted |
| Created By | Erin Massender | | |
| Created On | 2/15/2023 7:54 PM | Finished On | --- |

Properties

| | | | |
|------------------|--------------------------|---------------------|--------|
| File | BD_animals_13JAN2023.csv | Size | 431032 |
| Record Type | --- | Map | --- |
| Records Owned By | Erin Massender | Duplicate Detection | No |

Results

| | | | |
|------------------|---|----------|---|
| Successes | 0 | Failures | 0 |
| Partial Failures | 0 | Total | 0 |

BD_animals_13JAN2023.csv - Saved
Import Source File

General Failures Success Partial Failure Related

Export Error Rows Flow Run Report

| Se... | Log Phase | Description | Column Heading | Column Value | Origin... | Source Row | Error Code | More Information |
|-------|-----------|-------------|----------------|--------------|-----------|------------|------------|------------------|
|-------|-----------|-------------|----------------|--------------|-----------|------------|------------|------------------|

No data available.

Troubleshooting Imports

Here is a list of the most common import errors. Please contact the office and provide a picture of the error if you encounter an error that you are unsure how to resolve.

| Error | Steps to Resolve |
|---|--|
| The My Imports Status Reason for the file is Submitted, but Total processed is 0 | The file was not submitted for import as you did not select 'Finish Import', please try again. |
| Error with Log Phase of 'Parsing' , all rows failed. | The file is not in the right format or is corrupted. Please make sure you have saved it as a .CSV file and try again. |
| Error with Log Phase 'Transforming' with 'Description' of 'The Lookup reference could not be resolved'. | <p>The value for the lookup field is not already in the system or you have not mapped the correct column.</p> <p>Depending on the Column that caused the error you should check to make sure the value is in the system (e.g., you have created the Location or Group or the sire/dam is already in the system).</p> <p>Then, re-import the file and verify that you have mapped the lookup field correctly based on the information provided on Understanding Lookup Fields above.</p> |
| Error with Log Phase 'Transforming' with 'Description' 'Duplicate lookups could not be resolved' | <p>You have tried to import with a lookup value that is duplicated in the system so the program cannot determine what record to assign to.</p> <p>Make sure you don't have duplicates or similar values (e.g., 2 locations one premises1 and the other Premises1) would trigger this error.</p> |
| Error with 'Log Phase' Import Create or Update and 'Description' 'ISV code aborted the operation.' | This is a generic error message that indicates a data rule has failed, preventing the import of the record. Look at the 'More Information' column for the specific rule that caused the problem. |