

*aim* Data Xchange  
animal information management system

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# Data Xchange

animal information management system

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*by the caplen company*

*The Data Xchange application provides a comprehensive suite of features and functionality to import and export data between AIM users and commercial software applications.*

# Data Xchange

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## **Special thanks to:**

*The entire caplen company team for their hard work, attention to detail and their engineering expertise, which is second-to-none.*

*We also want to thank the many Commercial and Zoological customers who have provided valuable feedback, comments and suggestions, which have allowed us to create the most flexible and intuitive animal records management software solution available.*

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# Section

Introduction

1

# 1 Introduction



**Welcome** ... you are joining the worldwide community of users who have chosen the ultimate animal information management system to keep track of their very important animal inventory records.

This software product is the result of working with users in every strata of the animal world ... single pet owners to fully operational zoological parks ... to develop the most comprehensive and feature rich animal information management system.

Many of the features and functionality in **aim** cannot be found in other animal record keeping products ... which is why **aim** has become the technology of choice for animal records management around the world.

Please take a few minutes to familiarize yourself with the **aim** product ... run the software side-by-side with this help system.



This Quick Reference Guide is a living document. The most current version is always shipped on the product CD and placed on the website *downloads & updates* page. Following the installation of the software, you may want to periodically visit the website *downloads & updates* page to see if there is a newer version of this quick reference guide available for download.

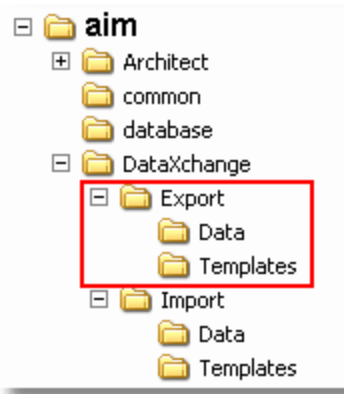
## 1.1 Getting Started

The **aim** animal information management system provides flexible, on-demand exporting capabilities throughout the **Data Records** and **Architect** components. The **Data Xchange** component provides an advanced set of structured export / import tools to enable you to exchange data records with other **aim** users or commercial software applications, such as accounting programs.

When I export **aim** data ... where does it go?

When I need to import data into **aim**, where do I find it?

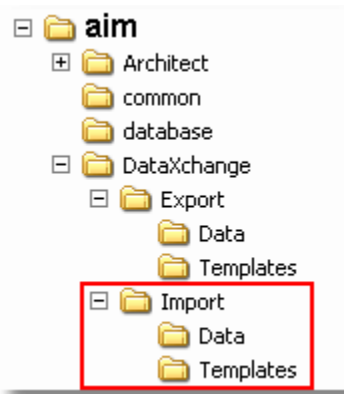
**Exporting Data ...**



When using the Data Xchange export functionality, the following rules apply:

- Exported data will be located in the *aim \ Export \ Data* folder.
- Export Templates will be stored in the *aim \ Export \ Templates* folder.

### Importing Data ...



When using the Data Xchange import functionality, the following rules apply:

- Importing data from another **aim** system ... Data Xchange will look in the *aim \ Import \ Data* folder for any packages that have been exported from another **aim** system. NOTE: When you receive an export from another **aim** user, simply place their export package into your *aim \ Import \ Data* folder.
- Importing from spreadsheets ... Data Xchange will provide a popup navigator for you to locate and select the desired spreadsheet.

NOTE: If you installed the **aim** software using the Setup Wizard defaults, the **aim** directory structure will be located at

**C:\Program Files\caplen company\aim**

## 1.1.1 Exporting Data

Exporting data takes data records from **aim** data tables and creates a copy of each exported data table in a proprietary or spreadsheet format. This provides standard formats for exchanging data with other **aim** users or commercial software applications.

## 1.1.2 Importing Data

Importing data reads the content of user-selected proprietary import packages or spreadsheet files and imports the data into **aim** data tables.

### 1.1.3 Data Xchange Formats

The Data Xchange program uses the **aim** proprietary file format or standard spreadsheet format for all export and import operations.

## Section

Export Workshop

2

## 2 Export Workshop

The export workshop provides an easy to use three step wizard to select the desired data to be exported.

Step 1 - Select the desired Record Type (Animals, Contacts, Standalone) and Filter

Step 2 - Select the desired Detail or Standalone data tables and construct export rules

Step 3 - Save the export settings to a reusable template and perform the export

### 2.1 Export : Step 1

Step 1 of the Export Wizard is used to:

- Select an Export Template
- Select the type of records to be exported (Animal or Contact Items)
- Set a Filter to establish the range of records to be exported

This panel provides the tools to select the type of records to be exported and a flexible set of filtering options to ensure that you are exporting the desired set of records.

This step is only required when exporting the following record types and record sets:

- Animal Inventory or Contact records.
- Detail records linked to Animal Inventory or Contact records.

NOTE: Standalone and Detail data entry records are specified in Step 2.

#### Step 1 Options

Reusable export templates are created in Step 3. The first time that you use the Export Workshop, this list will be empty. To use an existing export template, select the desired template from the drop down list and then click the button.

Select the record type to be exported from the drop down list. When you select a record type, the record list (right side of form) will display the available records.

The radio buttons can be used to apply the export to all records in the list, or can be set to use only the records that you select within the list.

Place a check mark into this check box if you want to use all records. As an example, if you have 100 Animal Inventory Items, then all 100 records will be available for exporting. When you uncheck the check box, the filtering tools will be enabled to specify a user-defined filter.

The following filtering tools are only available when the above check box is unchecked. Record filtering is based on the record type to be exported.

### Step 1 Data Records Filtering

Available for : Animal Inventory Records

This filter uses the IsActive data field to determine if the Animal Inventory record has been marked as Active or Inactive.

Available for : Animal Inventory Records

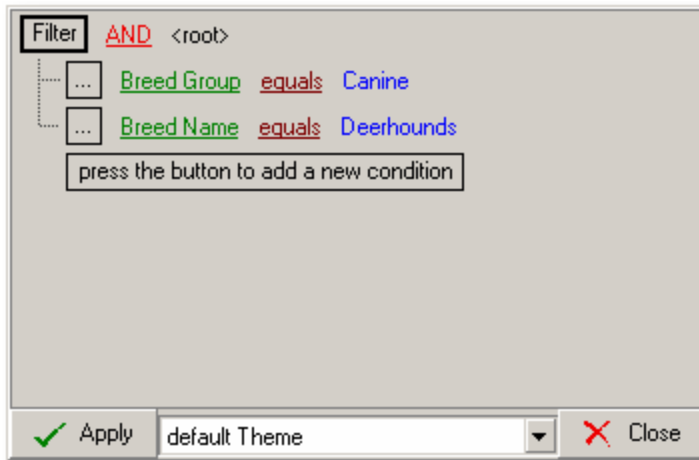
This filter displays a list of View Groups constructed in the View Group Workshop.

Available for : Animal Inventory or Contact Records

This filter displays a list of View Groups constructed using the dynamic View Group designer (F6).

Available for : Animal Inventory or Contact Records

This filter allows you to construct a dynamic filter for this export. The filter designer is equivalent to the designer used in the View Group Workshop and the dynamic View Group designer (F6).



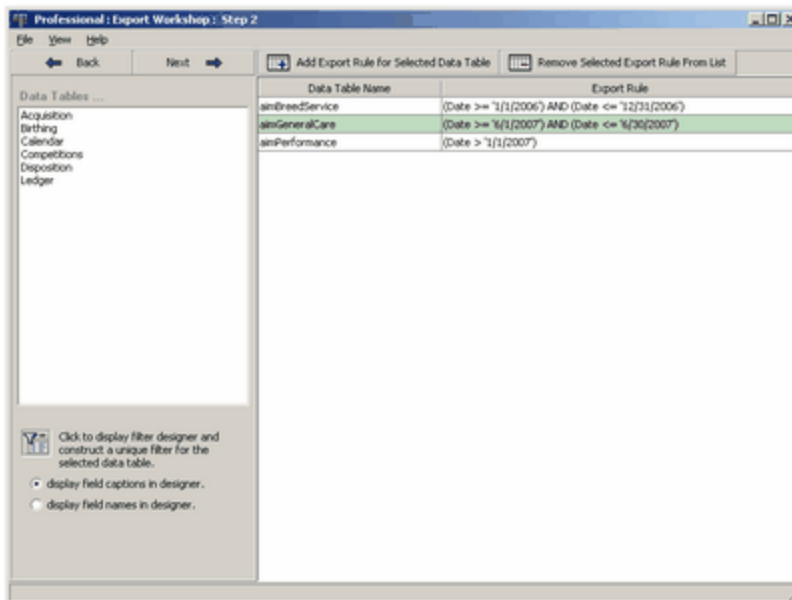
When you click on the designer button, the designer panel will be displayed. Create the desired filter and select the **apply** button to apply the filter.

NOTE: The field names (ex: Breed Group) displayed in the designer are Theme based. This allows you to create a filter using field names that are most familiar to you.

## 2.2 Export : Step 2

Step 2 of the Export Wizard is used to:

- Select the desired Detail data records for the export
- Set a Filter to establish the range of detail records to be exported for each selected Detail data table



To add a data table to the export, take one of the following actions:

- Double-click the desired data table in the list.
- Highlight the desired data table in the list and click the **Add Export Rule ...** toolbar button.

The Data Table will be added to the list on the right side of the form.

To remove a data table from the export, select the desired data table in the Rules list and click the **Remove Selected Export Rule ...** toolbar button.

The list of available **Data Tables** is determined by the **Record Type** selection that you made in Step 1. The following rules apply:

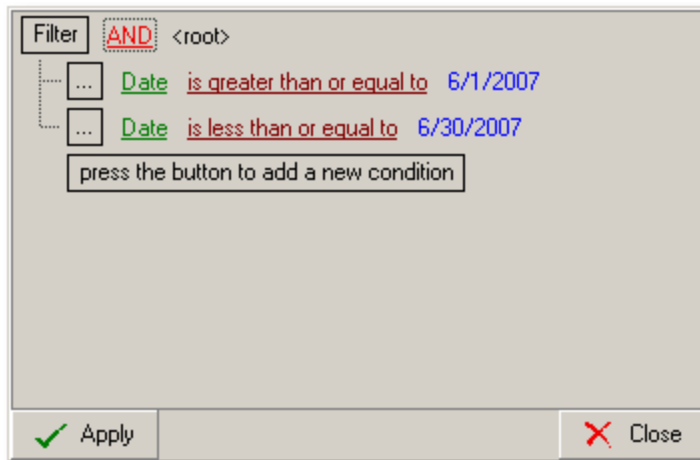
- Animal Inventory Items - Factory data entry forms plus any forms created in the Architect and linked to animal inventory items.

- Contact Items - Factory data entry forms plus any forms created in the Architect and linked to contact items.
- Standalone - Data entry forms created in the Architect and not linked to either animal inventory or contact items.

### Filter Rule for Detail Records

Individual rules can be constructed for each data table to be exported. If the **Export Rule** is left blank, then all records in the data table will be exported.

Typically, when exporting detail records, such as General Care and Maintenance, you will want to construct a filter on the table so that a specific range of records will be exported. However, if you want all available records to be exported, then remove the export rule for the table.



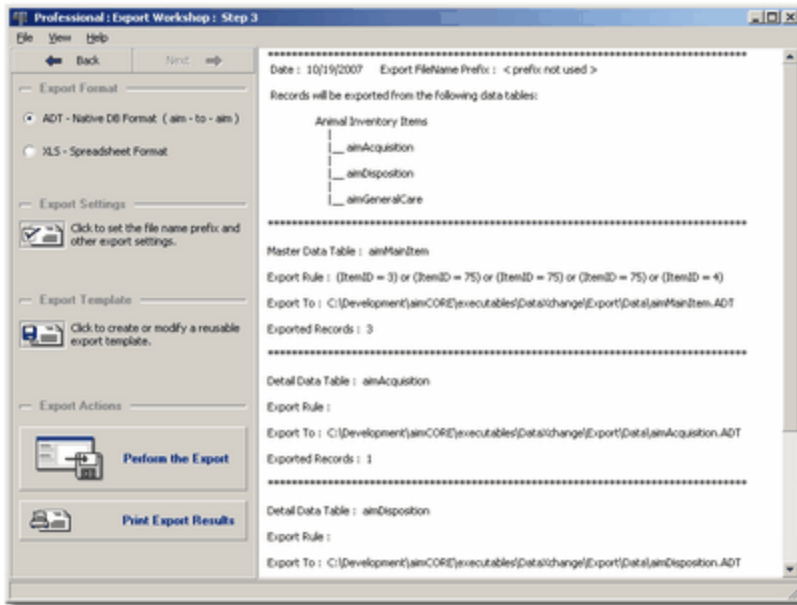
When you click on the designer button, the designer panel will be displayed. Create the desired filter and select the **apply** button to apply the filter.

This is an example of the Export Rule constructed for the selected data table in the above screen shot.

## 2.3 Export : Step 3

Step 3 of the Export Wizard is used to:

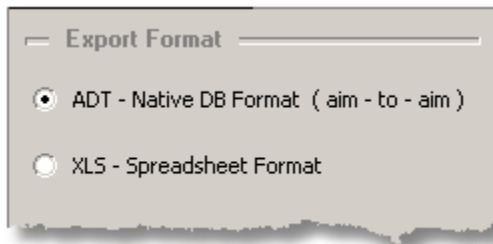
- Set the desired filename prefix for each exported set of records
- Select whether the field names will be included in the export (Export Header)
- Save the current export settings and rules as a reusable export template
- Perform the export
- Print the export action log



The last step of the export allows you to specify export settings to be applied when exporting each set of data records, save the settings and rules from Steps 1-3 to a template, and perform the export.

When the export is executed, an export action log will be created and displayed in the memo pane on the right side of the form. The complete action log is save as a text file along with the exported data.

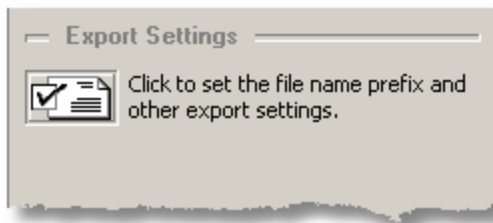
## Export Format



Data Xchange provides two (2) formats for exporting data records.

- ADT - Native DB Format. This format should be used when exporting data that will be imported into another **aim** software system. The export will produce the following files, which must be distributed together:
  - ⇒ \*.ADT - Data Tables
  - ⇒ \*.ADM - Memo data fields associated with a data table.
  - ⇒ Export List - Export package list.
  - ⇒ Export Log - List of export actions. This file does not have to be distributed.
- XLS - Spreadsheet Format. This format creates a spreadsheet for each exported data table.

## Export Settings



The export settings allow you to set the desired filename prefix for ADT and XLS exports and to set specific options for each exported file type.

When you click the settings button a multi-tabbed panel will be displayed.

Use the options on this tab to construct a filename prefix.

A filename prefix gives you the flexibility to uniquely identify each export package.

To prevent the accidental overwrite of core database tables, the software enforces the use of file name prefixes to create a unique file name for all files in the export package.

Using the file name prefix options, you can easily construct unique identifiers for each export package.

The export header is inserted at the top of the exported file and contains the data field names for each column of data in the spreadsheet.

## Export Template

The settings and rules displayed in Steps 1-3 can be saved as a reusable template. This makes it easy to perform repeated exports of data without having to reset settings and data record selections.

When you click the template button the below panel will be displayed.

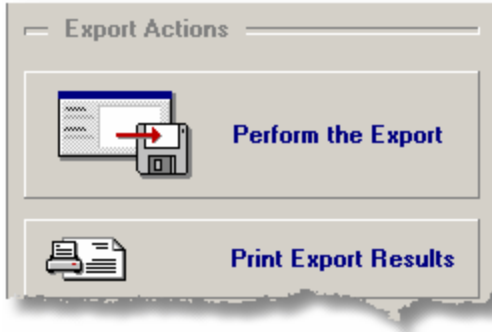
### Create a new Export Template

Select this option to create a new template. Enter the desired name for the template and click the **apply** button.

### Modify an existing Export Template

Select this option to overwrite an existing template with new settings and / or rules. Select the desired template from the drop down list and then click the **apply** button.

### Export Actions



When you are satisfied with your export settings, selections and rules, click the **Perform the Export** button to begin the export.

The export action log will be created during the export process, displaying information for each exported data table.

Click the **Print Export Results** button to print the export action log.

## Section

Import Workshop

3

## 3 Import Workshop

The Import Workshops provide two different methods of importing data into **aim**.

ADT - **aim** proprietary data file format. This format is used to exchange data between **aim** users.

XLS - Standard spreadsheet format. This import method is useful for importing inventory and / or pedigree records from breed associations.

### 3.1 Import From Another AIM ( ADT )

Importing data from another **aim** system is easy and fast ... using a two-step import wizard.

**Step 1** of the Import Wizard is used to:

- Select the desired import package.
- Validate the import package contents to verify that all required files are present.



This panel provides the tools to select the desired import package and validate the contents.

When you select an import package in the list, the corresponding Export Action Log will be displayed in the pane on the right side of the window.

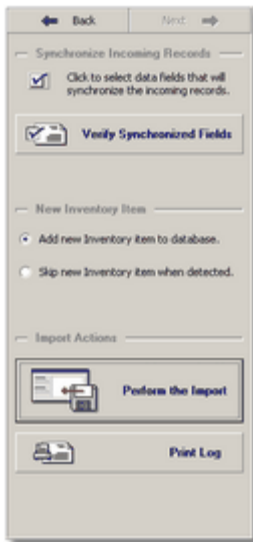


When you select the **Validate Package** button, the content of the import package will be checked for completeness and the results displayed in the Validate Package Log on the right side of the window.



**Step 2** of the Import Wizard is used to:

- Select the desired data fields to synchronize incoming data with existing database records.
- Perform the import.

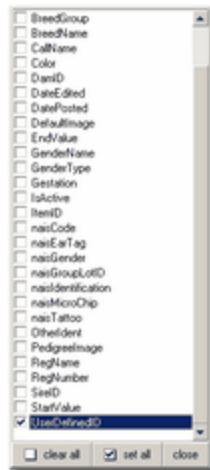


This panel provides the tools to synchronize incoming-to-existing data records and perform the import.

In order for **aim** to know which existing database records (Inventory and / or Contact) will be assigned the incoming records during the import process, you will need to synchronize one or more data fields.

For each import that you perform, you should take the following steps:

- Select one or more data fields to synchronize the import records with existing database records.
- Verify the synchronized data field selections.
- If the *verify* looks good to you ... perform the import.



Typically, each animal inventory item will have a single data field that uniquely identifies that animal ... such as Registration Number, Ear Tag, Tattoo, etc. In this case, you only need to select the single data field. However, if you do not identify each of your animal inventory items in this fashion, then you will need to select several data fields to uniquely identify each animal inventory item.

When you select the **Verify Synchronized Fields** button, the results will be reported in the Log on the right side of the window. The verify log will report all **DUPLICATES** and **NEW** records identified during the verification process.



**DUPLICATES:** Using the selected data field(s), a match was made between existing database records and records in the import package.

**NEW:** Using the selected data field(s), no match was found.

If needed, reselect more or less data fields and re-verify the synchronization until you are satisfied to move forward with the import process.

When you are ready ... select the **Perform the Import** button and the import process will begin.



During the import, an import action log will be constructed and displayed on the right side of the Step 2 window.

## 3.2 Import From Spreadsheet ( XLS )

Importing data from the industry standard spreadsheet format ( xls ) is easy and is performed using a four step wizard.

Step 1 - Select the Import Type.

Step 2 - Load, Review and / or Edit the Spreadsheet.

Step 3 - Connect Spreadsheet Data Columns to AIM Data Table and Data Fields.

Step 4 - Perform the Import Operation.

### Important Notes Regarding Spreadsheet Imports

Typically, spreadsheets contain columns of data and when displayed, column headers are identified using alphabetic characters ( A thru Z, AA thru ZZ, etc. ). When importing data into **aim** database table(s) using spreadsheets, you should prepare the spreadsheet to make the import process more efficient and reduce the possibility of errors in mapping the spreadsheet to the database table(s).

If your spreadsheet does not contain meaningful column names, generally located in the first row of the spreadsheet, please take the following steps to prepare the spreadsheet for import.

1. Open the spreadsheet using a spreadsheet compatible application, such as MS Excel.
2. Insert a new row at the top of the spreadsheet ( Row 1 ).
3. From left-to-right, select each cell in Row 1 and enter a meaningful descriptor for each column of data.
4. Save and close the spreadsheet.

### Reserved Words

The **aim** database uses reserved words to identify data fields. The following reserved words SHOULD NOT be used as column headers for spreadsheet imports: **ItemID, LinkID, SireID, DamID**

The following image presents an example of a spreadsheet which has been prepared using the above steps.

	A	B	C	D	E	F	G	H
	Registered Name	Registration Number	Breed Group	Breed Name	Breed Gender Name	Gender Type (M / F)	Birthdate	Color (Marking(s))
2	Abbe'	435 (F2)	Equine		Stallion	Male		
3	Absolut		Equine	Swedish Warmblood	Gelding	Male	4/20/1984	Chestnut
4	Barsanti		Equine		Stallion	Male		
5	Biaritz	294	Equine		Stallion	Male		
6	Briad	450	Equine		Stallion	Male		
7	CH Ardkinglas Plaid	H8947654 (9-76)	Canine	Scottish Deerhound				
8	CH Balnagown's Faerie Kelpie	HC580561 (4-83)	Canine	Scottish Deerhound				
9	CH Balnagown's Revenge	HD023119 (11-85)	Canine	Scottish Deerhound				
10	CH Crannoch's Fenris O'Fern Hill	HD079350 (10-86)	Canine	Scottish Deerhound				
11	CH Evermore Noble OI Balnagown	HC280174 (7-78)	Canine	Scottish Deerhound				
12	CH Fairyfort's Castle Gremlin	HC284304 (11-82)	Canine	Scottish Deerhound				
13	CH Foxcliffe Eclipse O'Fernhil	HD596505 (4-90)	Canine	Scottish Deerhound				
14	CH Foxcliffe's Colleach	HD006170 (4-85)	Canine	Scottish Deerhound				
15	CH Foxcliffe's Genuine Risk	HD 572947 (11-90)	Canine	Scottish Deerhound				

### Importing Detail Record Spreadsheets

Detail records, such as general care and maintenance, link to one or more Master records. Each row in the spreadsheet needs to be linked to a master record in order for the data to be imported. When importing detail records, prepare the spreadsheet using the following steps.

1. Enter column descriptors for each column in the spreadsheet (see above notes).
2. Save and close the spreadsheet.
3. Using the Import Spreadsheet Wizard, assign the LinkID value to each detail record in the spreadsheet. Refer to the Obtaining the SireID, DamID, LinkID for Existing Records topic for detailed instructions regarding associating spreadsheet rows to specific master records in the **aim** database.

The following image presents an example of a spreadsheet which has been prepared using the above steps.

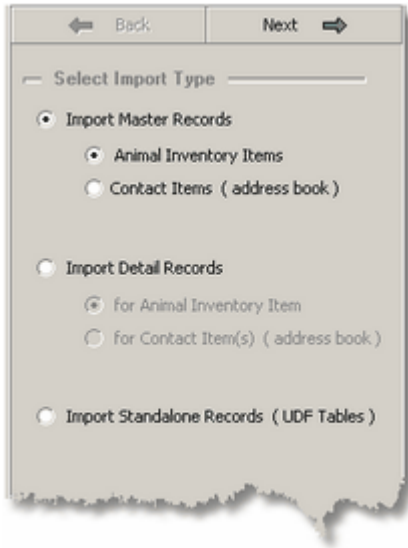
	A	B	C	D	E	F	G	H	I
	Date	Category	Sub Category	Type	Sub Type	Account	Sub Account	Amount	Payment Type
2	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations	BSE	(\$211.50)	cash
3	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations	Breeding	(\$44.25)	check business
4	4/14/2004	Veterinary	Office Visit	Financial	Expense			(\$125.77)	check business
5	4/15/2004	Veterinary	Office Visit	Financial	Expense			(\$165.45)	check business
6	3/7/2004	Veterinary	BSE	Financial	Expense	Operations	Breeding	(\$75.00)	check business
7									
8									

### 3.2.1 Select Import Type

Step 1 of the Import Spreadsheet Wizard is used to select the type of records to be imported:

- Master Records for Animal Inventory or Contact Items.
- Detail Records linked to Animal Inventory or Contact Items.

- Standalone Records for user-defined data entry forms ( UDF ).



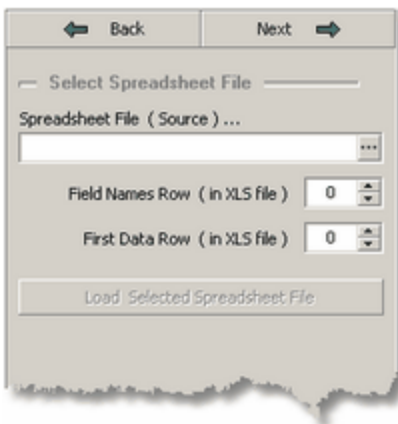
On this panel, select the type of data that will be imported from the spreadsheet into the **aim** database.

When you have selected the correct import type, select the NEXT button to advance to Step 2.

### 3.2.2 Load, Review, Edit Spreadsheet

Step 2 of the Import Spreadsheet Wizard is used to:

- Select and Load the desired spreadsheet file.
- Specify the row in the spreadsheet containing the field names associated with each spreadsheet column.
- Specify the row in the spreadsheet where the actual data is located.
- Edit data in the spreadsheet prior to importing the data into the **aim** database.



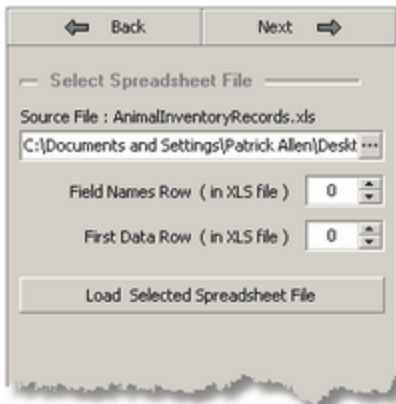
On this panel, select the desired spreadsheet file. To do this, simply click on the ellipse button to display the file location dialog box.

Once the spreadsheet has been loaded, you can then make adjustments to the import rules ( see below ), as well as edit data in the spreadsheet prior to importing the data.

**NOTE:** The data displayed in the grid is only a copy of the spreadsheet data. The original spreadsheet, located on your computer's file system, is not affected.

**RECOMMENDATION:** It is strongly recommended that imported spreadsheets contain data field names for each column of data in the spreadsheet ... typically the first row of the spreadsheet. This will make it easier to identify the incoming data and eliminate errors in mapping spreadsheet columns to data table fields in Step 3.

When you are ready, select the NEXT button to advance to Step 3.



When the desired spreadsheet is selected, it will be displayed in the grid on the right side of the form. The display will mimic a standard spreadsheet format using alphabetic characters as column headers.

	C	D	E	F
Registered Name		Registration Number	Breed Group	Breed Name
Abbe'		435 (F2)	Equine	
Absolut			Equine	Swedish Warmblood
Barsanti			Equine	
Biaritz		294	Equine	
Brisad		450	Equine	
CH Ardinglas Plaid		HB947654 (9-76)	Canine	Scottish Deerhound
CH Balnagown's Faerie Kelpie		HC580561 (4-83)	Canine	Scottish Deerhound
CH Balnagown's Revenge		HD023119 (11-85)	Canine	Scottish Deerhound
CH Crannoch's Fenris O'Fern Hill		HD079350 (10-86)	Canine	Scottish Deerhound
CH Evermore Noble Of Balnagown		HC280174 (7-78)	Canine	Scottish Deerhound
CH Fairyfort's Castle Gremlin		HC284304 (11-82)	Canine	Scottish Deerhound
CH Foxcliffe Eclipse O'Fernhil		HD596505 (4-90)	Canine	Scottish Deerhound
CH Foxcliffe's Calleach		HD006170 (4-85)	Canine	Scottish Deerhound
CH Foxcliffe's Genuine Risk		HD 572947 (11-90)	Canine	Scottish Deerhound
CH Geltsdale Beauty		HB722953 (2-76)	Canine	Scottish Deerhound
CH Giullari Erich Of Fairyfort		HC021836 (6-76)	Canine	Scottish Deerhound
CH Gwent's Trefor O'Fern Hill		HC433235 (2-82)	Canine	Scottish Deerhound
CH Highstone's Aberdeen		HC243604 (9-77)	Canine	Scottish Deerhound
CH Highstone's Gael Mactavish		HC042455 (12-77)	Canine	Scottish Deerhound
CH Lyonhil Claymore Of Evermore		HB960829 (2-76)	Canine	Scottish Deerhound
CH Lyonhil Highland Superb		HC025358 (9-76)	Canine	Scottish Deerhound
CH Lyonhil Highland Supreme		HC025359 (3-76)	Canine	Scottish Deerhound
CH Lyonhil Meg Merrielees		HD334071 (4-90)	Canine	Scottish Deerhound
CH Lyonhil Magnific		HM334598 / 01 (5-94)	Canine	Scottish Deerhound
CH Lyonhil Prankster		HD794727 (11-91)	Canine	Scottish Deerhound

Some spreadsheets may contain a row of field names which can be used to name each column of data, replacing the alphabetic characters as column headers. If your spreadsheet looks like the above example, use the numeric editors on the panel to specify which row in the spreadsheet contains the data field names as well as the row in the spreadsheet where the data begins.



Notice that the display in the grid has changed according to the numeric values on the panel. The data field names have replaced the alphabetic characters in the column headers and the data has been shifted upward to display the first row of data.

	Registered Name	Registration Number	Breed Group	Breed Name
▶	Abbe'	435 (F2)	Equine	
	Absolut		Equine	Swedish Warmblood
	Barsanti		Equine	
	Biaritz	294	Equine	
	Brisad	450	Equine	
	CH Ardinglas Plaid	HB947654 (9-76)	Canine	Scottish Deerhound
	CH Balnagown's Faerie Kelpie	HC580561 (4-83)	Canine	Scottish Deerhound
	CH Balnagown's Revenge	HD023119 (11-85)	Canine	Scottish Deerhound
	CH Crannoch's Fenris O'Fern Hill	HD079350 (10-86)	Canine	Scottish Deerhound
	CH Evermore Noble Of Balnagown	HC280174 (7-78)	Canine	Scottish Deerhound
	CH Fairyfort's Castle Gremlin	HC284304 (11-82)	Canine	Scottish Deerhound
	CH Foxcliffe Eclipse O'Fernhil	HD596505 (4-90)	Canine	Scottish Deerhound
	CH Foxcliffe's Calleach	HD006170 (4-85)	Canine	Scottish Deerhound
	CH Foxcliffe's Genuine Risk	HD 572947 (11-90)	Canine	Scottish Deerhound
	CH Geltsdale Beauty	HB722953 (2-76)	Canine	Scottish Deerhound
	CH Guallari Erich Of Fairyfort	HC021836 (6-76)	Canine	Scottish Deerhound
	CH Gwent's Trefor O'Fern Hill	HC433235 (2-82)	Canine	Scottish Deerhound
	CH Highstone's Aberdeen	HC243604 (9-77)	Canine	Scottish Deerhound
	CH Highstone's Gael Mactavish	HC042455 (12-77)	Canine	Scottish Deerhound
	CH Lyonhil Claymore Of Evermore	HB960829 (2-76)	Canine	Scottish Deerhound
	CH Lyonhil Highland Superb	HC025358 (9-76)	Canine	Scottish Deerhound
	CH Lyonhil Highland Supreme	HC025359 (3-76)	Canine	Scottish Deerhound
	CH Lyonhil Meg Merrielees	HD334071 (4-90)	Canine	Scottish Deerhound
	CH Lyonhil Magnific	HM334598 / 01 (5-94)	Canine	Scottish Deerhound
	CH Lyonhil Frankster	HD794727 (11-91)	Canine	Scottish Deerhound
	CH Lyonhil Punch Line	HD631033 (5-92)	Canine	Scottish Deerhound

The information in the column headers (alphabetic characters or field names) will be used to map the spreadsheet data to data fields in the database. Refer to the Connect Spreadsheet to Data Table topic for more information on connecting the spreadsheet data to the database.

### 3.2.2.1 Edit Data in the Spreadsheet

With the spreadsheet loaded into the grid, and prior to imported this set of data into the **aim** database, you have the option to edit the data. This is important for two reasons:


- You may see data in the spreadsheet that is more easily modified at this time rather than editing the data after it has been imported into the database.
- If you are importing detail records for animal inventory or contact items, you will need to enter the correct **LinkID** information into the LinkID column in the spreadsheet. The LinkID value is what connects each detail record to its master record.



The toolbar, located directly above the data grid, provides the functionality to:

- Edit data in a single cell, single row or multiple rows.
- Remove selected rows of data from the display (eliminating them from the import).

#### Edit a Single Cell of Data

To edit a single cell of data, select the  toolbar button to activate the in-place editors.

LinkID	Date	Category	Sub Category	Type	Sub Type	Account
	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations
	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations
	4/14/2004	Veterinary	Office Visit	Financial	Expense	
	4/15/2004	Veterinary	Office Visit	Financial	Expense	
	3/7/2004	Veterinary	BSE	Financial	Expense	Operations

Click on any cell in the grid and modify the data as desired.

### Edit Multiple Cells of Data

Data for a single cell, across many rows, can be performed easily. The following two examples demonstrate the selection of multiple and all rows in the data grid.

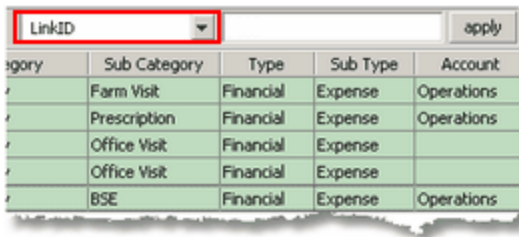
The first step in editing multiple cells of data is to select the desired rows of data in the spreadsheet. This can be done by selecting a subset of rows in the spreadsheet, or by selecting all rows in the spreadsheet.

#### Multiple Rows Selected

LinkID	Date	Category	Sub Category	Type	Sub Type	Account
	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations
*	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations
*	4/14/2004	Veterinary	Office Visit	Financial	Expense	
*	4/15/2004	Veterinary	Office Visit	Financial	Expense	
▶	3/7/2004	Veterinary	BSE	Financial	Expense	Operations

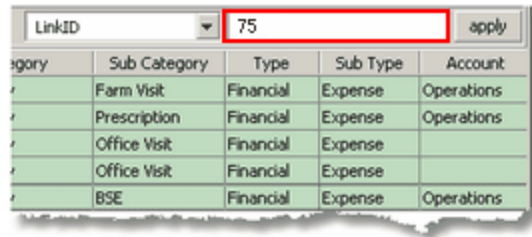
#### All Rows Selected

LinkID	Date	Category	Sub Category	Type	Sub Type	Account
*	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations
▶	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations
*	4/14/2004	Veterinary	Office Visit	Financial	Expense	
*	4/15/2004	Veterinary	Office Visit	Financial	Expense	
*	3/7/2004	Veterinary	BSE	Financial	Expense	Operations

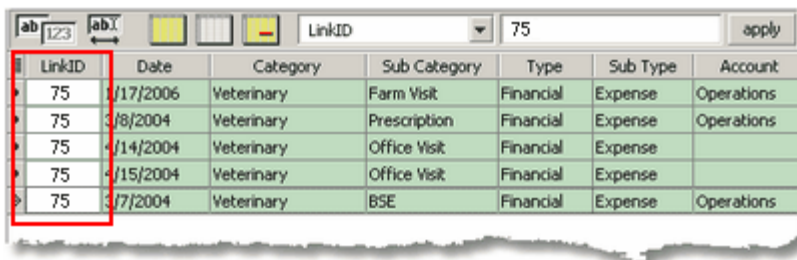


When you have completed selecting the desired rows in the spreadsheet, the next step is to select the desired data column from the drop down data column list.

With the data column selected from the drop down list, enter the desired value into the toolbar editor. Use the keyboard Enter key or the APPLY toolbar button to insert the value in the editor to data column for all selected rows.



When completed, your display should look similar to the following. Notice that the LinkID value in the toolbar editor has been distributed to the LinkID cell for each selected row in the spreadsheet. This same approach can be used to add, edit or remove data in grid cells or rows prior to importing the data into the database.



### 3.2.2.1.1 LinkID For Detail Records

Master-Detail records are associated to one another in a parent-child relationship. In other words, a Master record (parent) can have many detail records (children). The relationship is connected using the ItemID value of the parent record and the LinkID value of the child record(s).

The following image demonstrates a Master record.

Item ID	Registered Name	Registration Number	Breed Group	Breed Name	Breed Gender Name	Gender Type (M / F)	Birthdate	Color (Marking(s))
75	Foxcliffe Falkirk Stirling	HM678118 / 07	Canine	Scottish Deerhound	Dog	Male	10/3/1996	Brindle

Notice the ItemID value in the ItemID data field ( 75 ). For a detail record to be associated with this master record, the LinkID value in the detail record must contain the same value. The following image demonstrates detail records linked to the above master record.

Link ID	Date	Category	Sub Category	Account	Sub Account	Amount
75	1/17/2006	Veterinary	Farm Visit	Operations	BS Eval	(\$211.50)
75	3/8/2004	Veterinary	Prescription	Operations	Breeding	(\$44.25)
75	4/14/2004	Veterinary	Office Visit			(\$125.77)
75	4/15/2004	Veterinary	Office Visit			(\$165.45)
75	3/7/2004	Veterinary	BSE	Operations	Breeding	(\$75.00)

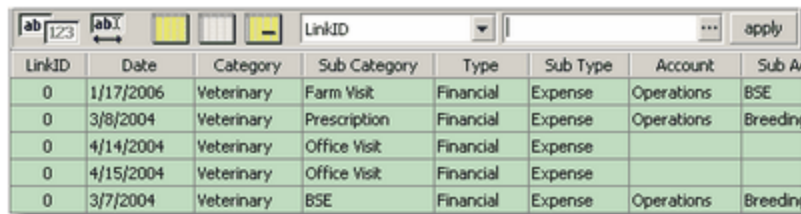
### Enter LinkID Directly Into a Data Cell

Refer to the Edit Data in the Spreadsheet topic for an example of how to directly enter the LinkID value into one or more data cells of the spreadsheet.

### Select the LinkID From a Selection List

If you do not know the explicit ItemID to enter into the LinkID cell(s) of the spreadsheet, that value can be obtained from a popup selection list of master records.

Select the desired row(s) in the spreadsheet that you want to link to a specific master record.



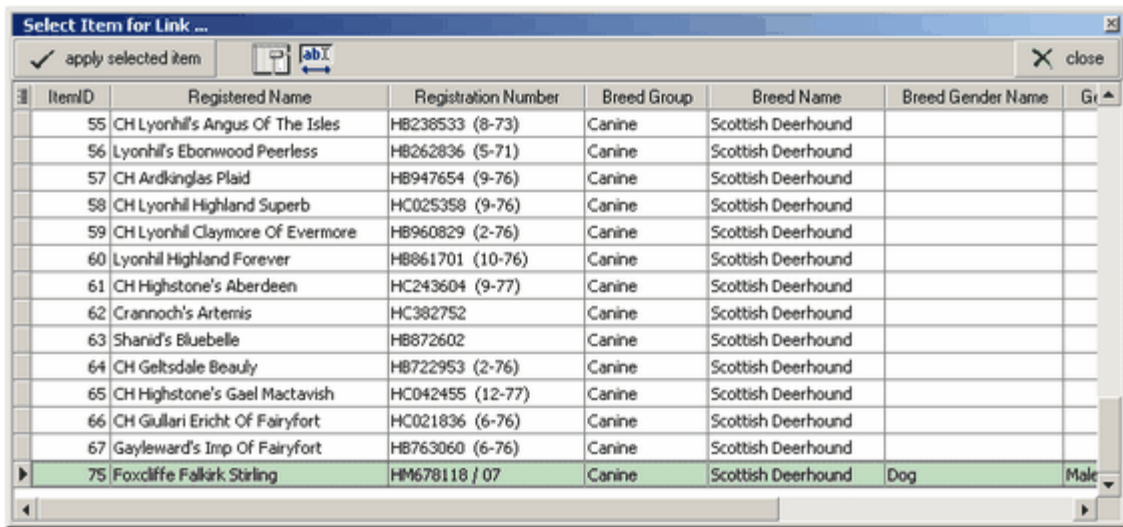
LinkID	Date	Category	Sub Category	Type	Sub Type	Account	Sub A
0	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations	BSE
0	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations	Breeding
0	4/14/2004	Veterinary	Office Visit	Financial	Expense		
0	4/15/2004	Veterinary	Office Visit	Financial	Expense		
0	3/7/2004	Veterinary	BSE	Financial	Expense	Operations	Breeding

Select the ellipse button in the toolbar editor to display the popup selection window.



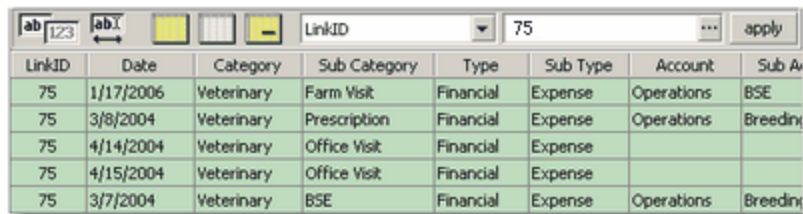
LinkID	Date	Category	Sub Category	Type	Sub Type	Account	Sub A
0	1/17/2006	Veterinary	Farm Visit	Financial	Expense	Operations	BSE
0	3/8/2004	Veterinary	Prescription	Financial	Expense	Operations	Breeding
0	4/14/2004	Veterinary	Office Visit	Financial	Expense		
0	4/15/2004	Veterinary	Office Visit	Financial	Expense		
0	3/7/2004	Veterinary	BSE	Financial	Expense	Operations	Breeding

When the popup selection list is displayed, locate the desired master record.



Double-click the desired master record with your mouse, or highlight the desired master record and click the **apply selected item** toolbar button. The popup master selection window will close and the ItemID of the selected master record will be applied to the LinkID data cell(s) in the spreadsheet.

The following image demonstrates how the LinkID cells in the spreadsheet should look after selecting the above master record.



3.2.2.1.2 Pedigree Links (SireID, DamID) For Master Records

The **aim** software system includes a Pedigree Workshop which dynamically creates an unlimited, yet user-selectable, number of levels for pedigree and progeny displays. At the core of this functionality are the SireID and DamID values for each record of the animal inventory.

When importing animal inventory records, you have several options regarding pedigree / progeny links for each record.

1. Import the records "as is" and use the Pedigree Workshop to link Sires, Dams and Progeny.
2. Import the records with SireID and DamID values provided in the spreadsheet. This option allows you to select ancestry links from existing inventory records, or create links within the spreadsheet.

This topic will describe how to perform option #2.

First, let's take a look at some existing records to see an example of how the ItemID, SireID and DamID relate to one another. The following image demonstrates several records containing ancestry links.

Item ID	Sire ID	Dam ID	Registered Name	Registration Number	Breed Group	Breed Name	Breed Gender Name	Gender Type (M/F)	Color (Markings)
3	34	35	Foxcliffe Lyonhl Olympian	HM506282 / 09 (6-96)	Canine	Scottish Deerhound	Dog	Male	Charcoal
4	53	54	Foxcliffe's Blue Angel	HM299940 / 01 (1-93)	Canine	Scottish Deerhound	Bitch	Female	Charcoal
75	3	4	Foxcliffe Falkirk Stirling	HM678118 / 07	Canine	Scottish Deerhound	Dog	Male	Brindle

Notice the SireID and DamID values of the highlighted record ( ItemID = 75 ).

- The SireID value points to the inventory record where ItemID = 3.
- The DamID value points to the inventory record where ItemID = 4.


When you import a spreadsheet containing animal inventory items, three additional data columns are automatically created:

1. ItemID. This column is automatically populated with projected ItemID values.
2. SireID. This column is automatically populated with zero values.
3. DamID. This column is automatically populated with zero values.

The following image demonstrates the above data columns and their populated values.

ItemID	SireID	DamID	Registered Name	Registration Number	Breed
76	0	0	Abbe'	435 (F2)	Equine
77	0	0	Absolut		Equine
78	0	0	Barsanti		Equine
79	0	0	Biaritz	294	Equine
80	0	0	Brisad	450	Equine
81	0	0	CH Ardinglas Plaid	HB947654 (9-76)	Canine
82	0	0	CH Balhagown's Faerie Kelpie	HC580561 (4-83)	Canine
83	0	0	CH Balhagown's Revenge	HD023119 (11-85)	Canine
84	0	0	CH Crannoch's Fenris O'Fern Hill	HD079350 (10-86)	Canine
85	0	0	CH Evermore Noble Of Balhagown	HC280174 (7-78)	Canine
86	0	0	CH Fairyfort's Castle Gromp	HC284304 (11-82)	Canine

### Enter SireID / DamID Directly Into a Data Cell(s)

To enter a SireID or DamID into a single cell of data, select the  toolbar button to activate the in-place editors.

ItemID	SireID	DamID	Registered Name	Registration Number	Breed
76	0	0	Abbe'	435 (F2)	Equine
77	0	0	Absolut		Equine
78	0	0	Barsanti		Equine
79	0	0	Biaritz	294	Equine

This approach should only be used when you know the ItemID of an existing animal inventory item in the **aim** database, or the Sire and Dam exist within the spreadsheet. The following image demonstrates assigning a SireID and DamID where the Sire and Dam are also listed in the spreadsheet.

ItemID	SireID	DamID	Registered Name	Registration Number	Breed
76	0	0	Abbe'	435 (F2)	Equine
77	78	76	Absolut		Equine
78	0	0	Barsanti		Equine
79	0	0	Biaritz	294	Equine
80	0	0	Brisad	450	Equine
81	0	0	CH Ardkinglas Plaid	HB947654 (9-76)	Canine
82	0	0	CH Balnacown's Faerie Kelpie	HC580561 (4-83)	Canine

Notice that the Sire is Barsanti ( ItemID = 78 ) and the Dam is Abbe' ( ItemID = 76 ). If the Sire or Dam for Absolut ( ItemID = 77 ) already existed in the **aim** database, then you would enter those values into the SireID and DamID cells.

This same approach can be used throughout the spreadsheet to establish SireID and DamID links for desired rows of data. Additionally, if multiple rows in the spreadsheet share the same Sire or Dam, it's easy to populate multiple rows at one time. To do this, take the following steps:

1. Select all rows in the spreadsheet that share the same Sire or Dam.
2. In the toolbar drop down list, select SireID or DamID ... whichever is appropriate.
3. Enter the SireID or DamID into the toolbar editor.
4. Press the Enter keyboard key or the APPLY toolbar button to insert the SireID or DamID value into the selected spreadsheet rows.

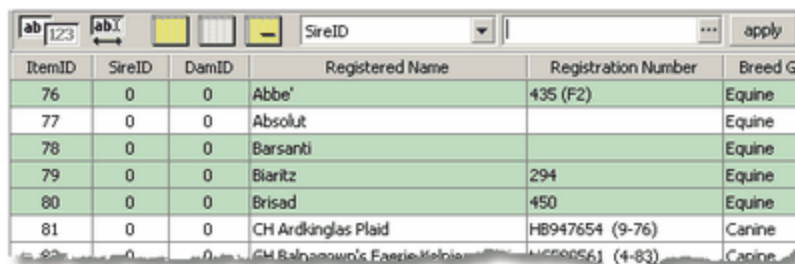
**Special Note:** If you remove rows from a spreadsheet after SireID and DamID values have been entered, the following rules apply:

- The ItemID column in the spreadsheet will be reinitialized with numeric values in ascending order.
- SireID and DamID values for existing **aim** database records will be preserved.
- SireID and DamID values for rows within the spreadsheet will revert to zero and will need to be reentered.

### Select the SireID / DamID From a Selection List

You may import a spreadsheet where multiple rows in the spreadsheet have the same Sire or Dam already existing in the **aim** database. When this condition arises, it's easy to select the Sire or Dam from a popup list and apply the SireID or DamID value to multiple rows in the spreadsheet.

Select the desired row(s) in the spreadsheet that share the same parent. In this example, we will select a SireID



Select the ellipse button in the toolbar editor to display the popup selection window.

ItemID	SireID	DamID	Registered Name	Registration Number	Breed Gr
76	0	0	Abbe'	435 (F2)	Equine
77	0	0	Absolut		Equine
78	0	0	Barsanti		Equine
79	0	0	Biaritz	294	Equine
80	0	0	Brisad	450	Equine
81	0	0	CH Ardinglas Plaid	HB947654 (9-76)	Canine
82	0	0	CH Balnagown's Faeie Kelpie	HC590561 (4-83)	Canine

When the popup selection list is displayed, locate the desired animal inventory record.

ItemID	Registered Name	Registration Number	Breed Group	Breed Name	Breed Gender Name	Gender Ty
7	Abbe'	435 (F2)	Equine		Stallion	Male
9	Biaritz	294	Equine		Stallion	Male
11	Hamlet		Equine		Stallion	Male
13	Heristal	224	Equine		Stallion	Male
15	Brisad	450	Equine		Stallion	Male
17	Drabant	315	Equine		Stallion	Male
19	Meteor		Equine		Stallion	Male
21	Vageur	DH 210	Equine		Stallion	Male
23	Vagabond	433	Equine		Stallion	Male
26	Frondeur	(5) 333	Equine		Stallion	Male
28	Kartago	373	Equine		Stallion	Male
30	Dohna II		Equine		Stallion	Male
32	Pommery	200	Equine		Stallion	Male
75	Foxcliffe Falkirk Stirling	HM678118 / 07	Canine	Scottish Deerhound	Dog	Male

Double-click the desired animal inventory record with your mouse, or highlight the desired record and click the **apply selected item** toolbar button. The popup selection window will close and the ItemID of the selected record will be applied to the SireID data cell(s) in the spreadsheet.

The following image demonstrates how the SireID cells in the spreadsheet should look after selecting the above record.

ItemID	SireID	DamID	Registered Name	Registration Number	Breed Gr
76	17	0	Abbe'	435 (F2)	Equine
77	0	0	Absolut		Equine
78	17	0	Barsanti		Equine
79	17	0	Biaritz	294	Equine
80	17	0	Brisad	450	Equine
81	0	0	CH Ardinglas Plaid	HB947654 (9-76)	Canine
82	0	0	CH Balnagown's Faeie Kelpie	HC590561 (4-83)	Canine

### 3.2.2.2 Remove Data Rows from the Import

There may be occasions when the data displayed in the grid represents more rows of data than you want to include in the import process. When this happens, you can easily remove the unwanted rows of data.

This topic provides instructions how to select and remove rows of data. Rows can be selected as a contiguous or random. The following steps describe each method.

**Contiguous Block**

Registered Name	Registration Number	Breed Group	Breed Name
Haniet	(35) 5957	Equine	
Frondeur	(5) 333	Equine	
Edelweiss	9530	Equine	
Karlago	373	Equine	
Tania	5729	Equine	
Dohna II		Equine	
Sahi	4998	Equine	
Pommesy	200	Equine	
Sylvia	3860	Equine	
CH Lyonhill Pushaway	HM381978 / 02 (5-94)	Canine	Scottish Deeshound
CH Lyonhill Megralic	HM334598 / 01 (5-94)	Canine	Scottish Deeshound
CH Lyonhill Prankster	HD794727 (11-91)	Canine	Scottish Deeshound
CH Lyonhill Punch Line	HD631033 (5-92)	Canine	Scottish Deeshound
CH Foxcliffe Eclipse O'Femhl	HD596505 (4-90)	Canine	Scottish Deeshound
CH Lyonhill Meg Menieles	HD334071 (4-90)	Canine	Scottish Deeshound
Lyonhill Bahagown Hoax	HD438251 (1-89)	Canine	Scottish Deeshound
CH Crannoch's Ferns O'Fern Hill	HD079390 (10-86)	Canine	Scottish Deeshound
CH Foxcliffe's Calceach	HD006170 (4-85)	Canine	Scottish Deeshound
Lyonhill Highland Haggis	HC803662 (11-85)	Canine	Scottish Deeshound
CH Bahagown's Revenge	HD023119 (11-85)	Canine	Scottish Deeshound
Crannoch's Ode	HC885150 (11-85)	Canine	Scottish Deeshound
Crannoch's Alarita	HC608000	Canine	Scottish Deeshound
CH Gwent's Trelor O'Fern Hill	HC433235 (2-82)	Canine	Scottish Deeshound
CH Fayloft's Castle Greenlin	HC284304 (11-82)	Canine	Scottish Deeshound
CH Lyonhill Mair Maribear	HM779369 (11-78)	Canine	Scottish Deeshound

To select a contiguous block (range) of rows, take the following steps:


1. Use the left mouse button and click on the first row of the block.
2. Hold down the Shift keyboard key and with the left mouse button, click on the last row in the block (range). Notice that all rows in the block are selected.

**Random Selection**

Registered Name	Registration Number	Breed Group	Breed Name
Broad	450	Equine	
Lonea	7601	Equine	
Diabunt	315	Equine	
Vardlo	363	Equine	
Meteor		Equine	
Hecog	353	Equine	
Vagueur	DH 210	Equine	
Polyanna	DH 585	Equine	
Vagabond	433	Equine	
Ethodite	(23) 6211	Equine	
Haniet	(35) 5957	Equine	
Frondeur	(5) 333	Equine	
Edelweiss	9530	Equine	
Karlago	373	Equine	
Tania	5729	Equine	
Dohna II		Equine	
Sahi	4998	Equine	
Pommesy	200	Equine	
Sylvia	3860	Equine	
CH Lyonhill Pushaway	HM381978 / 02 (5-94)	Canine	Scottish Deeshound
CH Lyonhill Megralic	HM334598 / 01 (5-94)	Canine	Scottish Deeshound
CH Lyonhill Prankster	HD794727 (11-91)	Canine	Scottish Deeshound
CH Lyonhill Punch Line	HD631033 (5-92)	Canine	Scottish Deeshound
CH Foxcliffe Eclipse O'Femhl	HD596505 (4-90)	Canine	Scottish Deeshound
CH Lyonhill Mair Maribear	HM779369 (11-78)	Canine	Scottish Deeshound

To select / deselect random rows, take the following steps:

1. Use the left mouse button and click on the first row.
2. Hold down the Ctrl keyboard key and with the left mouse button click on any of the remaining rows. Notice that the randomly selected rows are highlighted.
3. Repeat Step 2 to select more rows, or to deselect any rows that were previously selected.

Once you have selected the desired rows, select the  toolbar button to remove the selected rows from the display ... they will not be included in the import process.

**3.2.2.3 Obtaining the SireID, DamID, LinkID for Existing Records**

When importing master or detail records from a spreadsheet file you may need to know the ItemID value of existing aim database records to facilitate LinkID, SireID and / or DamID values.

For detail records, only spreadsheet rows with a valid LinkID value will be imported.

This topic demonstrates how to obtain a listing of ItemID values for existing records in the aim

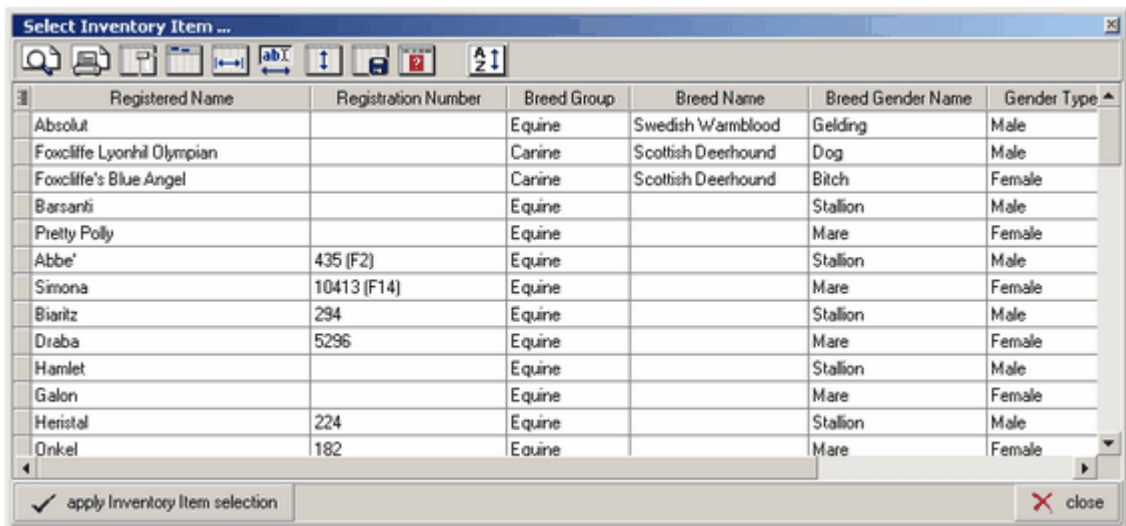
database.

### Get the Master Record ItemID value(s)

1. Launch the aimRecords application component.
2. Select the F5 keyboard key to display a list of animal inventory items.
3. Make the ItemID column visible in the record list display.
4. Select the print preview toolbar button to print the list of Master records.
5. Use this printed list to identify the correct ItemID value to enter into the LinkID, SireID and / or DamID column for selected rows in the spreadsheet.

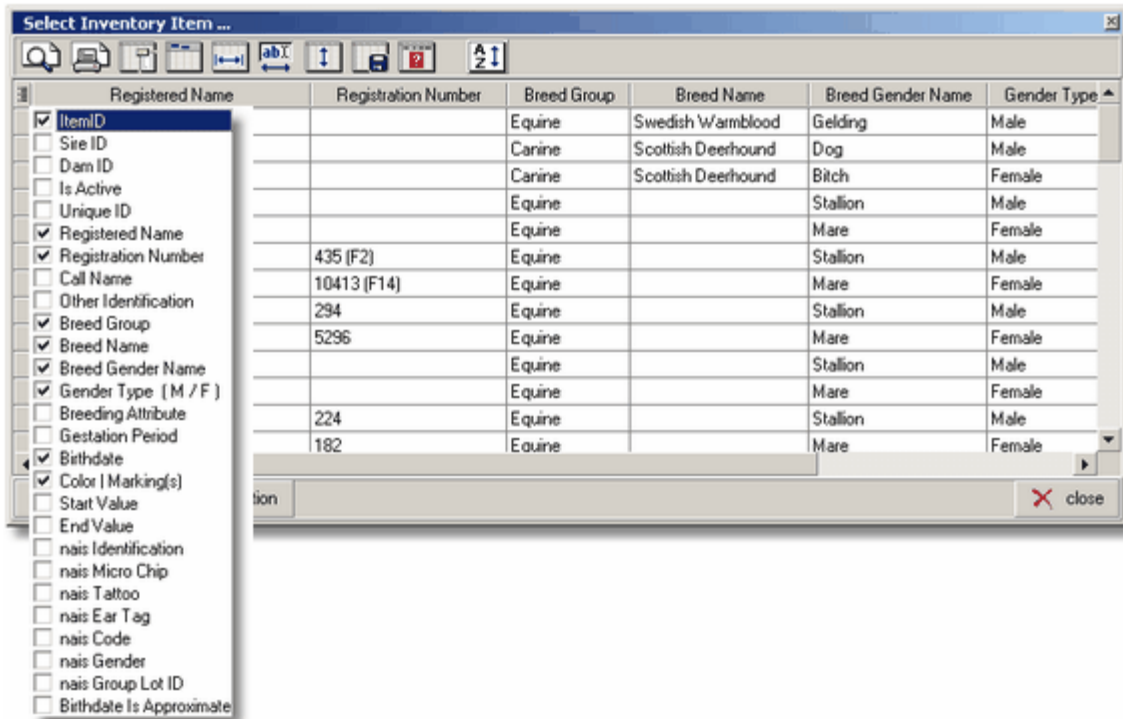
The following screenshot examples assist in understanding and executing the above steps.

Select the F5 keyboard key to display a list of animal inventory items.

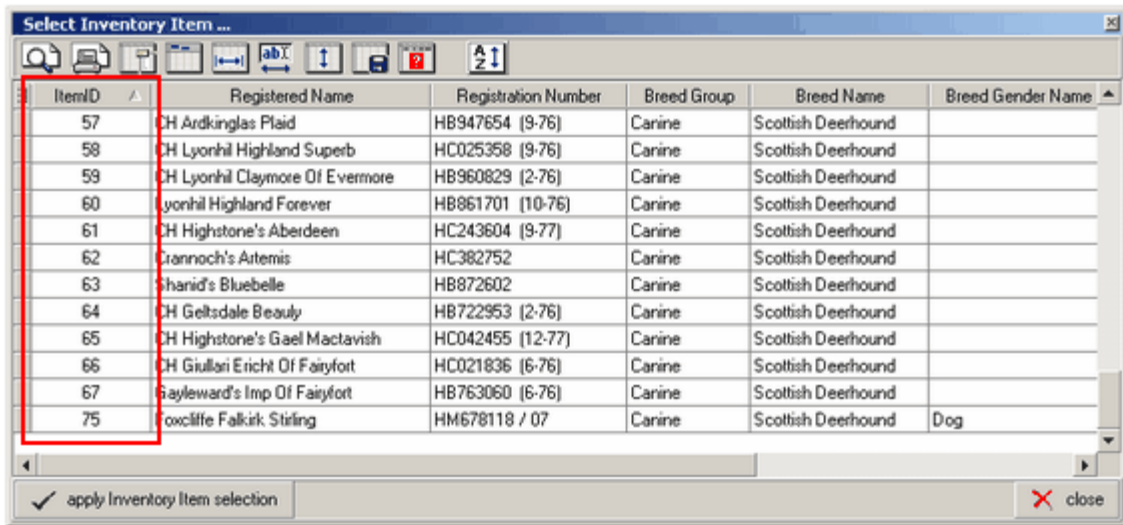


Registered Name	Registration Number	Breed Group	Breed Name	Breed Gender Name	Gender Type
Absolut		Equine	Swedish Warmblood	Gelding	Male
Foxcliffe Lyonhil Olympian		Canine	Scottish Deerhound	Dog	Male
Foxcliffe's Blue Angel		Canine	Scottish Deerhound	Bitch	Female
Barsanti		Equine		Stallion	Male
Pretty Polly		Equine		Mare	Female
Abbe'	435 (F2)	Equine		Stallion	Male
Simona	10413 (F14)	Equine		Mare	Female
Bianitz	294	Equine		Stallion	Male
Draba	5296	Equine		Mare	Female
Hamlet		Equine		Stallion	Male
Galon		Equine		Mare	Female
Heristal	224	Equine		Stallion	Male
Onkel	182	Equine		Mare	Female

Make the ItemID column visible in the record list display.



Select the print preview toolbar button to print the entire list.



### 3.2.3 Connect Spreadsheet to Data Table

Step 3 of the Import Spreadsheet Wizard provides the functionality to:

- Construct a user-defined data map.
- Load a data map from the template archive.
- Save a user-defined data map to the template archive.

### 3.2.3.1 Construct a User-defined Data Map

Constructing a data map is easy. Simply select the desired data table, then associate ( map ) spreadsheet columns to data table fields.

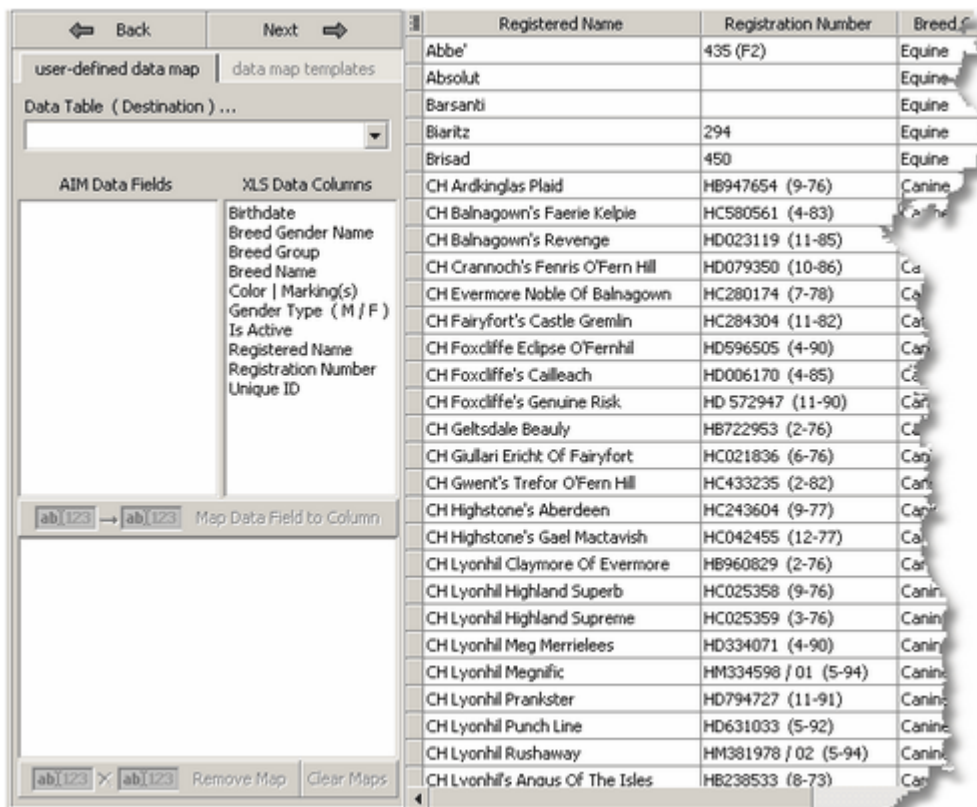
NOTE: Some spreadsheets may contain more data columns than you want to import into an **aim** database table. Data mapping gives you the flexibility to specify an explicit set of data to be imported.

#### Required Data Maps

The following table lists data maps that are required, depending on the import type, to ensure a successful import.

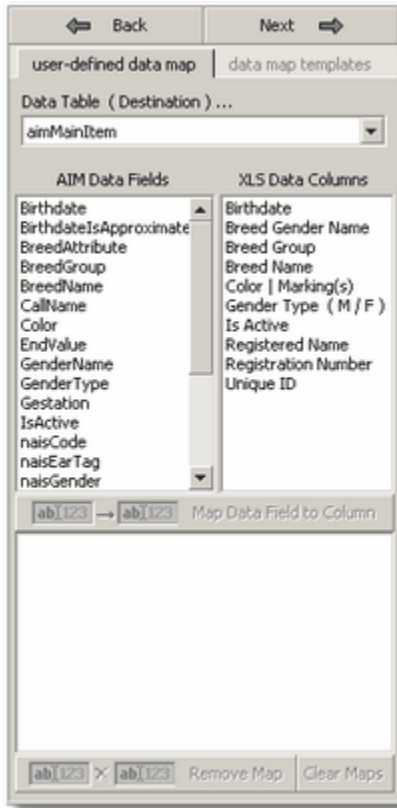
Type of Import	Required Data Maps	Remarks
Master Records - Animals	ItemID=ItemID SireID=SireID DamID=DamID	These maps ensure that the correct ItemID, SireID and DamID are assigned to each imported record.
Master Records - Contacts	ItemID=ItemID	This map ensures that the correct ItemID is assigned to each imported record.
Detail Records	LinkID=LinkID	This map ensures that the correct LinkID is assigned to each imported record.

When you first enter Step 3, the display will look similar to the following.



Notice that the column names in the spreadsheet are displayed in the XLS Data Columns list.

### Select the Data Table

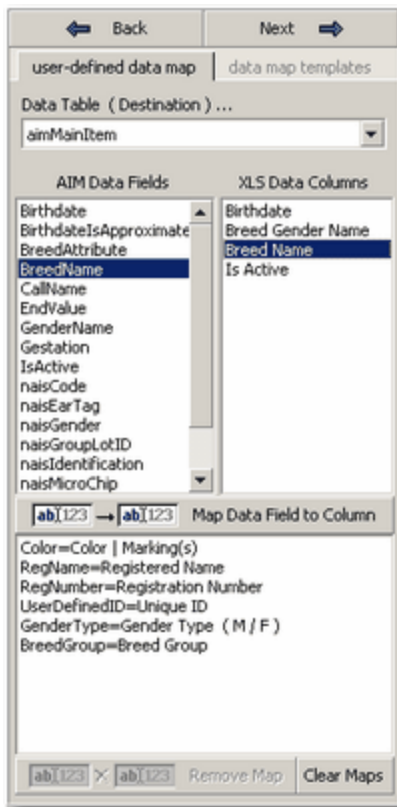


Select the **aim** data table from the drop down list.

In this example, since we are going to import master records into the animal inventory table, we have selected the **aimMainItem** data table.

Notice that the data field names are displayed in the AIM Data Fields list.

### Associate ( map ) Data Fields to Data Columns



Since our example spreadsheet contains meaningful column names versus A thru Z alphabetic characters, associating (mapping) data fields to spreadsheet columns can be accomplished easily.

To map a data field to a spreadsheet column, take the following steps:

1. Select a data field name.
2. Select a data column name.
3. Select the Map Data Field to Column button below the lists.

Repeat the above steps for each data field / data column pair that you want to map. Each mapped pair will be added to the data map listing at the bottom of the Step 3 panel.

**IMPORTANT NOTE:** When mapping data fields to spreadsheet columns of data, be sure map the correct data types together, such as integer-to-integer, date-to-date, alphanumeric-to-alphanumeric. When the import process is executed only valid data type matchings will be imported. If you are unsure of the data type, use the User Interface Themes or aimArchitect Data Dictionary to review / print the database data field types.

### 3.2.3.2 Data Map Archive

The Data Map Archive contains reusable data maps which have been previously constructed and saved. A typical data map contains the following information.

[ImportDataFile] This section of the Data Map contains the Import Data File information.

IDF=aimGeneralCar  
e

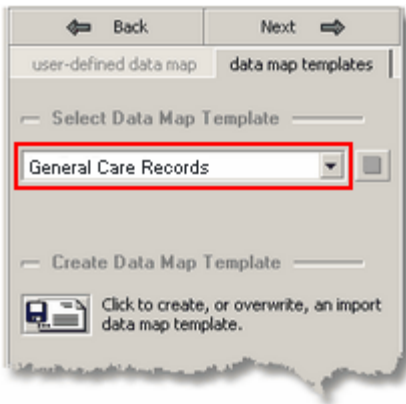
[ImportDataMaps] This section of the Data Map contains the individual mappings which associate a data field in the import data file to a column of data in the spreadsheet.

Category=Category  
Date=Date  
LinkID=LinkID  
Memo=Memo  
LedgerAccount=Account  
LedgerAmount=Amount

Once a Data Map has been constructed and saved to the archive, it can be reused for subsequent data import activities.

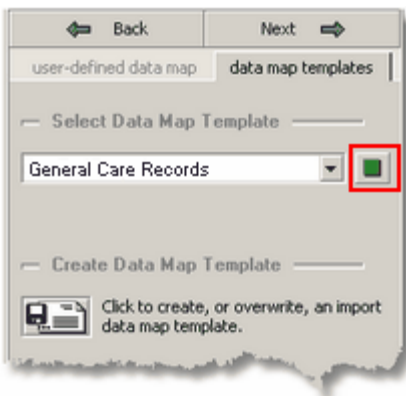
#### 3.2.3.2.1 Load Data Map from Template Archive

This topic provides instruction how to load a data map template from the archive.



Select the desired data map template from the drop down selection list.

When a template is selected, the "Use this template..." button will be enabled.



Select the "Use this template..." button to implement the selected template.

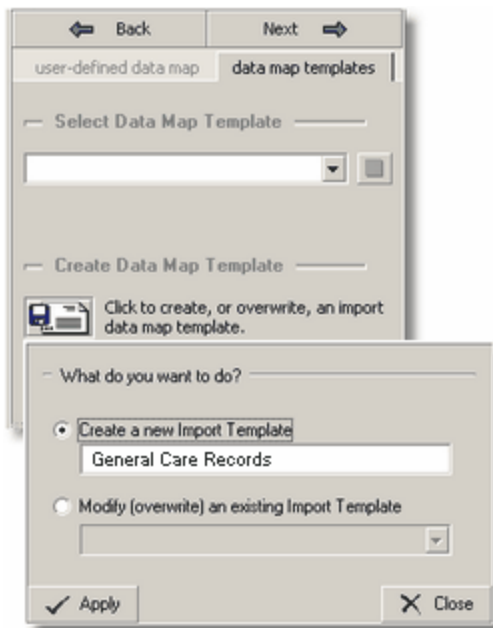
When this button is selected, the template will be validated to ensure that a compatible template has been selected for use with rules and settings for the current import activity.


If the template is not compatible, an error message will be displayed and you can select another template.

If the template is compatible, the content of the template file will be applied to the components on the user-defined data map tab and the user interface will change tabs to display the user-defined data map tab.

### 3.2.3.2.2 Save Data Map to Template Archive

This topic provides instruction how to save a data map template to the archive.



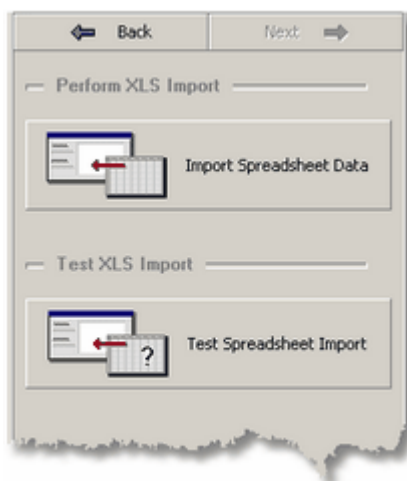
Select the  button to display the popup panel. With the panel displayed, the following actions are available.

- Create a Template. Enter the desired template name and select the APPLY button.
- Modify a Template. When an existing template is modified, the newer version can overwrite an existing version. Select the desired template name from the drop down list. To complete the overwrite, select the APPLY button.

The saved template will be stored in the template archive for reuse.

### 3.2.4 Perform Import Operation

Step 4 of the Import Spreadsheet Wizard is used to perform the import of spreadsheet data into the desired **aim** database table.



#### Perform XLS Import

Select the "Import Spreadsheet Data" button to begin the import process. Each row of the spreadsheet data will be validated and imported into the database table. The results of the import process will be posted in the XLS Import Log.

#### Test XLS Import

Select the "Test Spreadsheet Import" button to test the import prior to physically inserting data into a data table. The results of the test will be posted in the XLS Import Log.



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P.O. Box 517  
Jefferson, Maryland 21755  
USA

[www.caplencompany.com](http://www.caplencompany.com)

240.490.7019