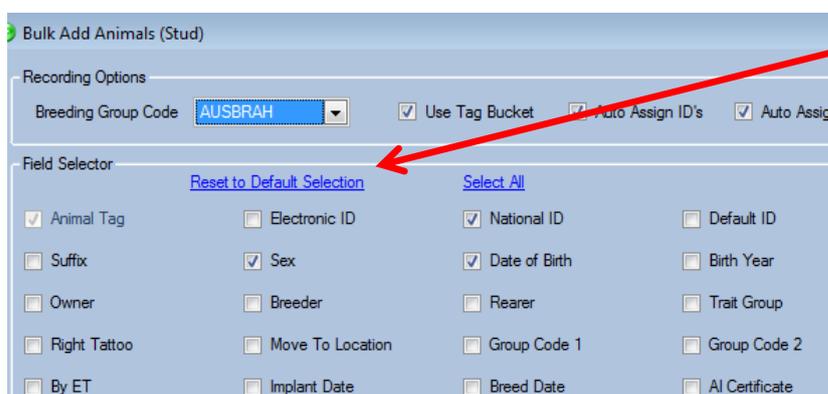# HerdMASTER 4 Tip Sheet
BULK ADD ANIMAL WITH MATINGS

IMPORTING A CSV FILE TO THE BULK ADD ANIMAL STUD SCREEN

There are times when you may have calves in a spread sheet that you need to load into HerdMASTER. Usually you can do this using the UFIU, but when the calves need to be assigned to mating's you must use the Bulk Add Animals Stud – Bulk Import function to load the calves.

There are a few things you need to setup before you load your file into the Bulk Add Animal Stud Screen.

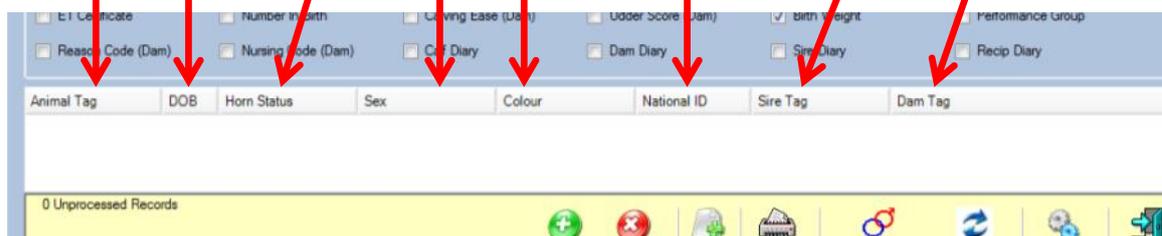1) Open the Bulk Add Animal Stud Screen and click Reset Columns to Default

2) Use the checkboxes to show all the columns and drag them to the correct position exactly as they appear in your spread sheet. This is essential your spread sheet must exactly match your data entry grid.

Excel

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3) Lastly before import you need to ensure your import options are correct. At the top of the screen there are 5 checkboxes. Use the guide below to determine if you need them checked or not.

a. Use Tag Bucket – Use this option if you have a tag bucket loaded and the new calf animal tags will match suggested tags in the View/Edit Tag Bucket screen. If checked HerdMASTER will try to match the new calves based on their animal tag to existing records in the Tag Bucket screen. If there is match the EID and National IF will be updated.

b. Auto-Assign ID's – Use this option to allow HerdMASTER to auto-generate your Society ID, Tattoo and Suffix as per the normal Add Calf Screen. When this option is checked if all required information to generate your tag format is present HerdMASTER will create the new calves Society ID, tattoo and Suffix.

c. Auto-Assign Animal Tags – This option is not required for the Bulk Import – When checked and you click the Add button it will attempt to set the next Animal Tag based on the previous row's animal tag.

d. Use New Animal Defaults for New Records – Use this option to set the animal's defaults as it is loaded into the grid. Note this option is highly recommended as it will set owner and breeder information as well as any other defaults you have specified in the site options.

e. Use Matings – Use this option to allow HerdMASTER to try and match Dam's to the correct mating. Note this option is highly recommended as the fact that you have matings is exacly why you are using this function and not the UFIU.

4) Once all options are set correctly click Import at the bottom of the screen to begin the import. You will be prompted for the file, select it to continue. Note the import file needs to be CSV Comma Delimited.

5) After you click Ok to the Open File Dialog the animals will load and the grid will be populated. If you had the Auto-Update ID's check box checked HM will not go through and try to auto-calculate the ID's for each animal as specified in your ID Formats (Site Options).

6) Once HM has created the ID's you will be prompted to Update Matings. If you choose Yes and have Dams specified for the calves HS will go through each calf in the grid and attempt to update the matings based on the sire and dam of the calf. Note there must be a mating with no existing outcome code that matches the sire and dam for this function to work.

7) Now all information should be ready for processing, verify all your data is correct and click Process to add the claves. If required you can show additional columns at this point to verify ID's were correctly created and that Dams and Sires are still present.

8) You will now see a report displaying all database operations about the calves you just entered. If you are going to load another spread sheet please ensure you reset the columns to exactly match the new import file (step 2)

If you have any problems or questions please contact the technical support desk on 1-800-111-637.