

Ranch Manager

Version 2

Tutorial

Equine Edition

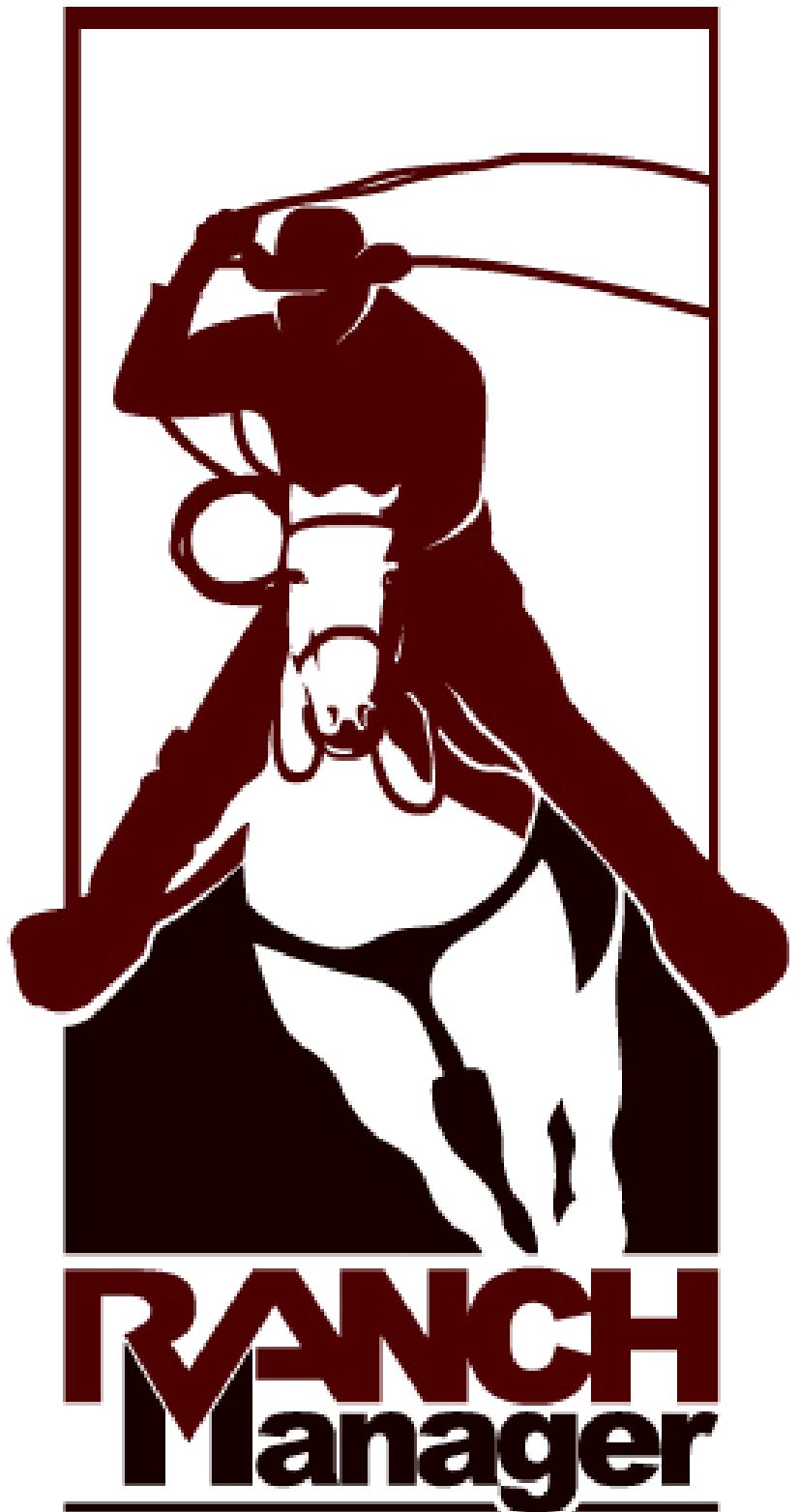


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Introduction

Welcome to Ranch Manager!

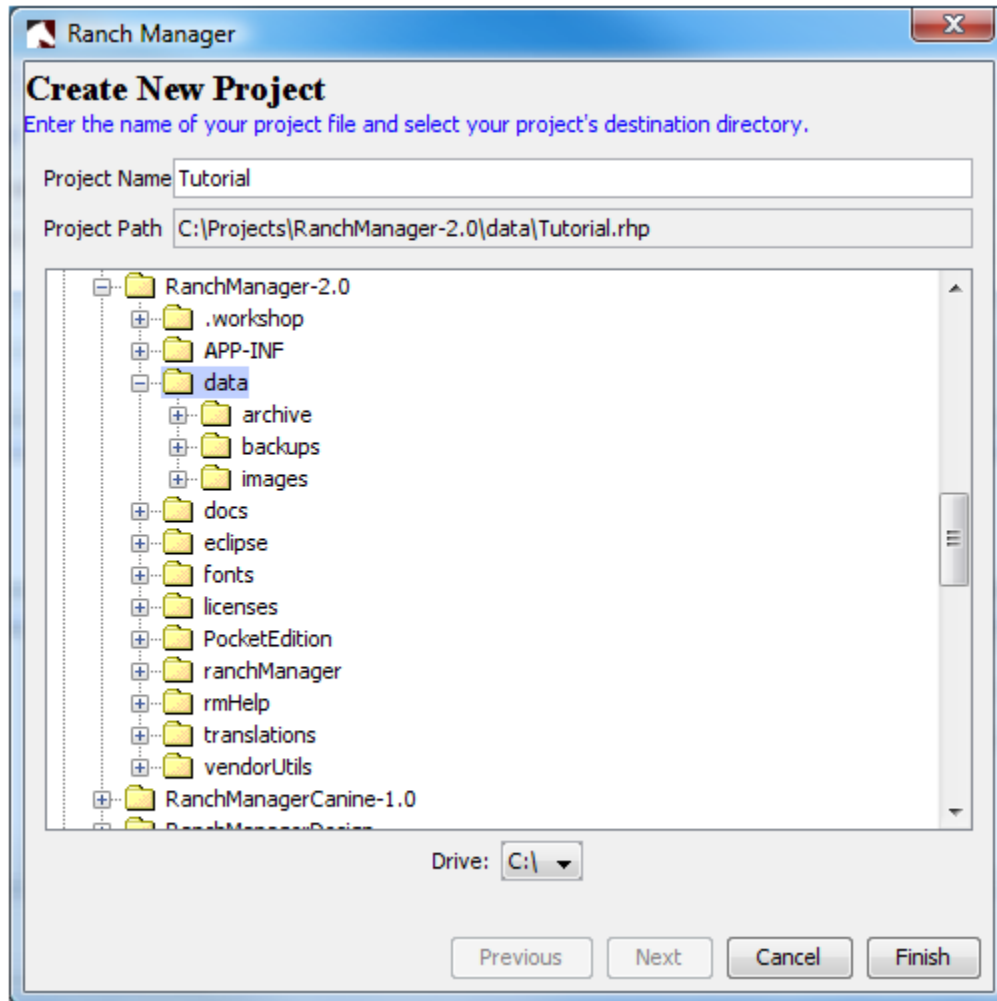
The goal of this tutorial is to familiarize you with the most commonly used features of Ranch Manager! By the time you complete this tutorial, you will have had a brief run-in with all the major features of Ranch Manager and will be well on your way to setting up your software to best meet the individual needs of your operation.

Let's get started! We'll start by creating a tutorial project, and when we wrap up at the end of the tutorial we will leave you back with the project you created during the installation of Ranch Manager.

Create a Tutorial Project

The first thing we need to do is create a tutorial project, so we don't mess up the project where your real operation's data will reside.

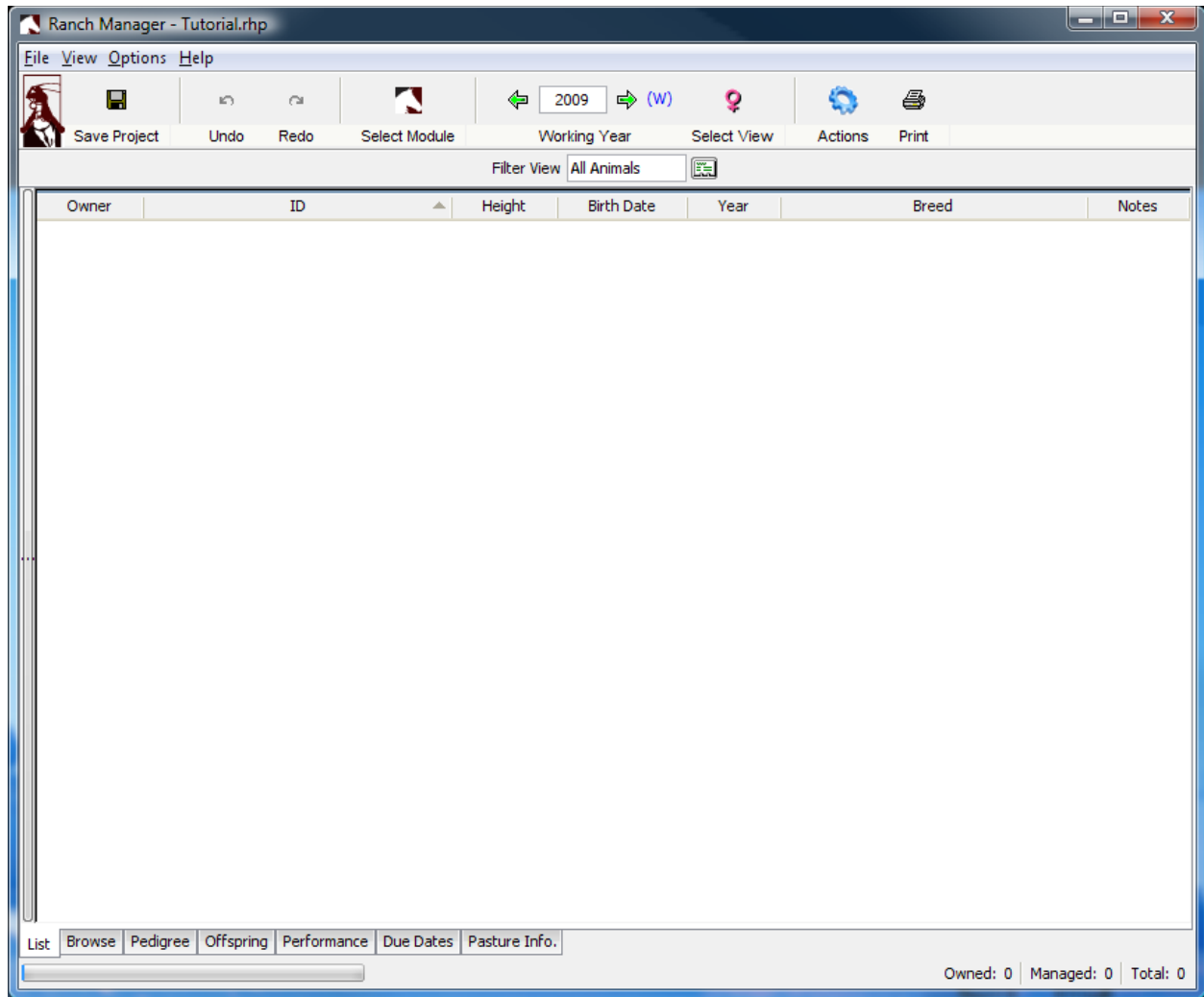
- 1) Start by clicking on the **File** menu and select the **New** option. The **Create New Project** window will appear (see below):



- 2) In the *Project Name* field enter "Tutorial".
- 3) Click on the *Finish* button located in the bottom right corner.

Ranch Manager will now create a project called "Tutorial" and leave you in the **Equine Herd** module looking at the **Herd Mares** view. Your Ranch Manager window should look similar to the one depicted below:

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Note the "Tutorial.rhp" on the title bar indicating the tutorial project you just created is now open. Also notice that the Equine Edition icon is located above the **Select Module** control on the **Toolbar**. This indicates that the currently selected module is the **Equine Herd** module. Finally the pink, female icon above the **Select View** control shows that you are currently looking at the **Herd Mares** view. As we add female animals to the program we will begin to see them listed in this view.

Let's add some animals now.

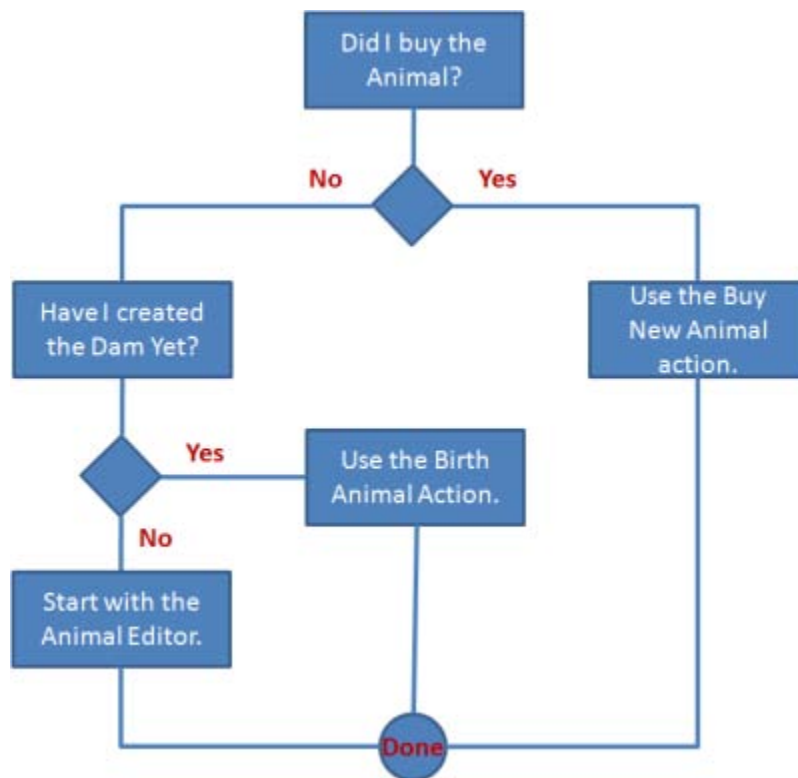
Creating Some Animals

There are basically three primary ways to create animal records in Ranch Manager:

- Buy an animal, by using the **Buy New Animal** action. This will allow you to create the animal at the same time as attaching a **Purchase Animal** event to the animal.
- Birth the animal from an existing female, which will pull information from the dam, and sire (when known) to make creating the animal much faster.
- Entering the animal from scratch using the **Animal Editor** view. Typically you will use this interface when you just want to enter your current set of animals, and not record who you purchased them from (perhaps you don't know), or you don't have the dam entered yet and maybe don't plan to (you have to start somewhere right).

In the end, all methods finish up in the **Animal Editor** view so you can add any additional information to the animal that may not have been offered in the method being used to create the base animal record.

When entering animals a good workflow for each of your animals is as follows:



We're going to use all three, so let's start with the most flexible one, the **Animal Editor**.

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- 1) To access the **Animal Editor** view, move the mouse over the **Select View** control on the toolbar and select the **Animal Editor** option from the spring menu. Your screen should look like this:

The screenshot shows the Ranch Manager - Tutorial.rhp application window. The interface includes a menu bar (File, View, Options, Help) and a toolbar with icons for Save Project, Undo, Redo, Select Module, Working Year (2009), Select View, Actions, and Print. Below the toolbar is a tabbed interface with tabs for Main, Additional Info., Animal Tracking, Worksheets, and Notes. The Main tab is active, displaying the Animal Editor form. The form is divided into several sections: Identification (with fields for Display Name, Name, Markings, Microchip, Brand, Passport, Other ID, Tattoo, Registration Number, Tracking #, Country, and Breeder), Characteristics (with fields for Gender, Sire, Dam, Surrogate Dam, Breed, Height, Birth Date, Birth Weight, Birth Ease, and Color, and checkboxes for Purebred, Mark Animal, Twin, Raised, Mark for Sale, and Not Managed), Owner (with a field for Lion Edge Technologies), Description (with a large text area), and Image (with a checkbox for Primary Image and navigation icons). At the bottom of the window, there is a '<New Animal>' button and a status bar.

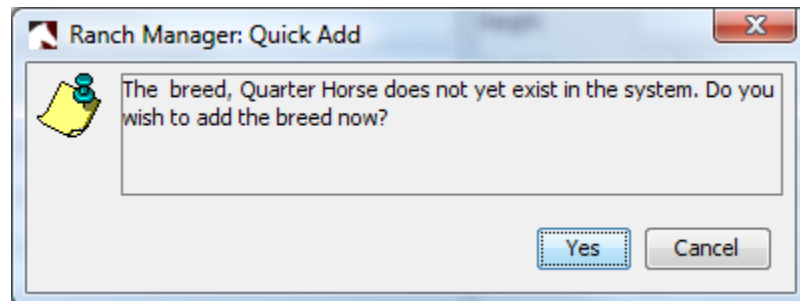
The **Animal Editor** is composed of multiple sub-views, which are represented by tabs located at the top of the panel. When you open the **Animal Editor** the first time you will be viewing the **Main** tab. This tab is where you will enter (and later view) the primary information for the animal. The only data you need to provide in order to create an animal is the **Display Name**, **Gender**, and **Breed** (highlighted in Red). You will also need to provide the **Birth Date** if the animal is marked as **Raised** (see the raised check box in the **Characteristics** panel above; if it is checked you must provide a value for **Birth Date**. Let's continue with creating our first animal.

- 2) Enter the name "Fame" in the **Display Name** field. The **Display Name** will be used throughout Ranch Manager when referring to this animal. The value doesn't have to be

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the official name of the animal, but rather, should represent the animal the same you would for convenience. For instance, let's say that Fame's registered name is "Fame 47L", you would probably just refer to her as "Fame".

- 3) Enter "Fame 47L" in the *Name* field. You can then enter other, official, identification values you have for the animal in the *Markings*, *Microchip*, *Brand*, *Passport*, *Other ID*, and *Registration Number* fields. For this example, let's leave these blank, but enter a value of "L71 T7N" in the *Tattoo* field and "7438348" in the *Registration Number* field. These values are all optional, but we can search on them later.
- 4) We need to enter a value for *Gender* (because it is labeled in red) but since the animal is *Female* we can leave this value alone since the default is *Mare*.
- 5) Let's leave the *Sire* and *Dam* values as "—Unknown—" for now also and we will come back to them. Same goes for *Surrogate Dam*.
- 6) Type "Quarter Horse" into the *Breed* value. If you attempt to use the little rolodex icon to the right of the field, you will notice that there are no breeds to select from (yet).
- 7) Enter a *Birth Date* of "12-Mar-2006". Enter "12" into the first field, then press the tab key to move to the month field, and enter "Mar"; then hit tab one more time to enter the year in the last field "2006". You can use the little calendar button to the right of the field to select the data, but it's usually just easier to type it in.
- 8) Let's save the animal now, but clicking on the **Save Animal** action located in the bottom right corner (remember, it's the little baseball base turned sideways). You will be prompted with the following message:



- 9) Ranch Manager comes with many convenience features that allow you to quickly add records to the database. In this case, the Quarter Horse breed does not yet exist, so we can click "Yes" to add it to the project. Click "Yes", to create a new breed record called "Quarter Horse". The next time you create an Quarter Horse, you can just select it from the breed list rather than typing it in each time.
- 10) When done your Ranch Manager screen should look something like this:

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Ranch Manager - Tutorial.rhp

File View Options Help

Save Project Undo Redo Select Module Working Year 2009 Select View Actions Print

Main Additional Info. Animal Tracking Event History Worksheets Notes Pedigree Offspring Gestation History Feed History Location History

Identification

Display Name Fame

Name Fame 47L

Markings

Microchip

Brand

Passport

Other ID

Tattoo L71 T7N

Registration Number 7438348

Tracking #

Country

Breeder --Unknown--

Characteristics

Gender Mare

Sire --Unknown--

Dam --Unknown--

Surrogate Dam --Unknown--

Breed Quarter Horse Purebred

Height

Birth Date 12 Mar 2006

Birth Weight

Birth Ease

Color

☐ Purebred ☐ Mark Animal ☐ Twin

☒ Raised ☐ Mark for Sale ☐ Not Managed

Owner

Lion Edge Technologies

Description

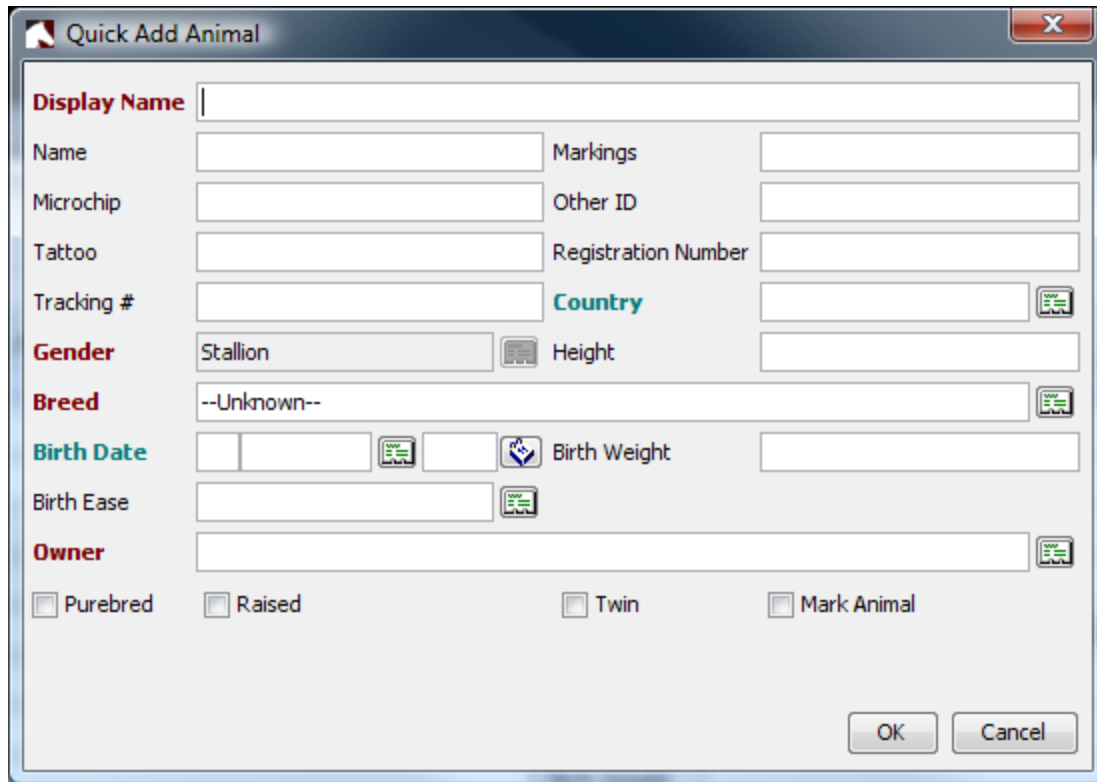
Image

☒ Primary Image

Fame

- 11) You may have noticed that there are a bunch of extra tabs at the top. These are **Active Record Tabs** that appear once you have successfully created the base animal record. We will take a closer look at them later. Finally, note the **Fame** in blue letters at the bottom of the editor. This tells you that the animal has been created, and if you change tabs at the top, you will still know what animal you are working with.
- 12) Let's continue with Fame by providing data for the *Sire* and *Dam* fields. You may have noticed that you cannot simply type a value into these fields. This is because an animal requires more than simply a *Display Name* value in order to create it. To begin entering a sire for Fame, click on the little blank sheet of paper to the right of the *Sire* field. The **Quick Add Animal** window will be displayed:

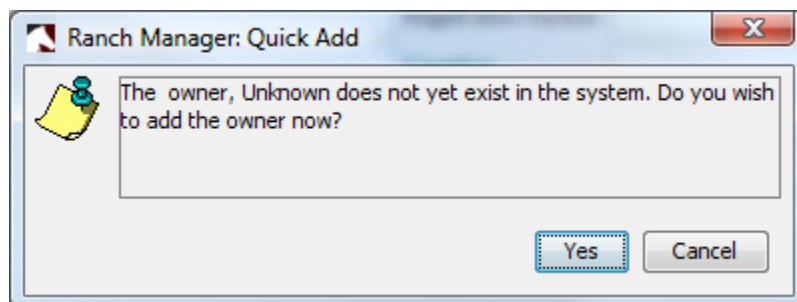
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The "Quick Add Animal" dialog box contains the following fields and controls:

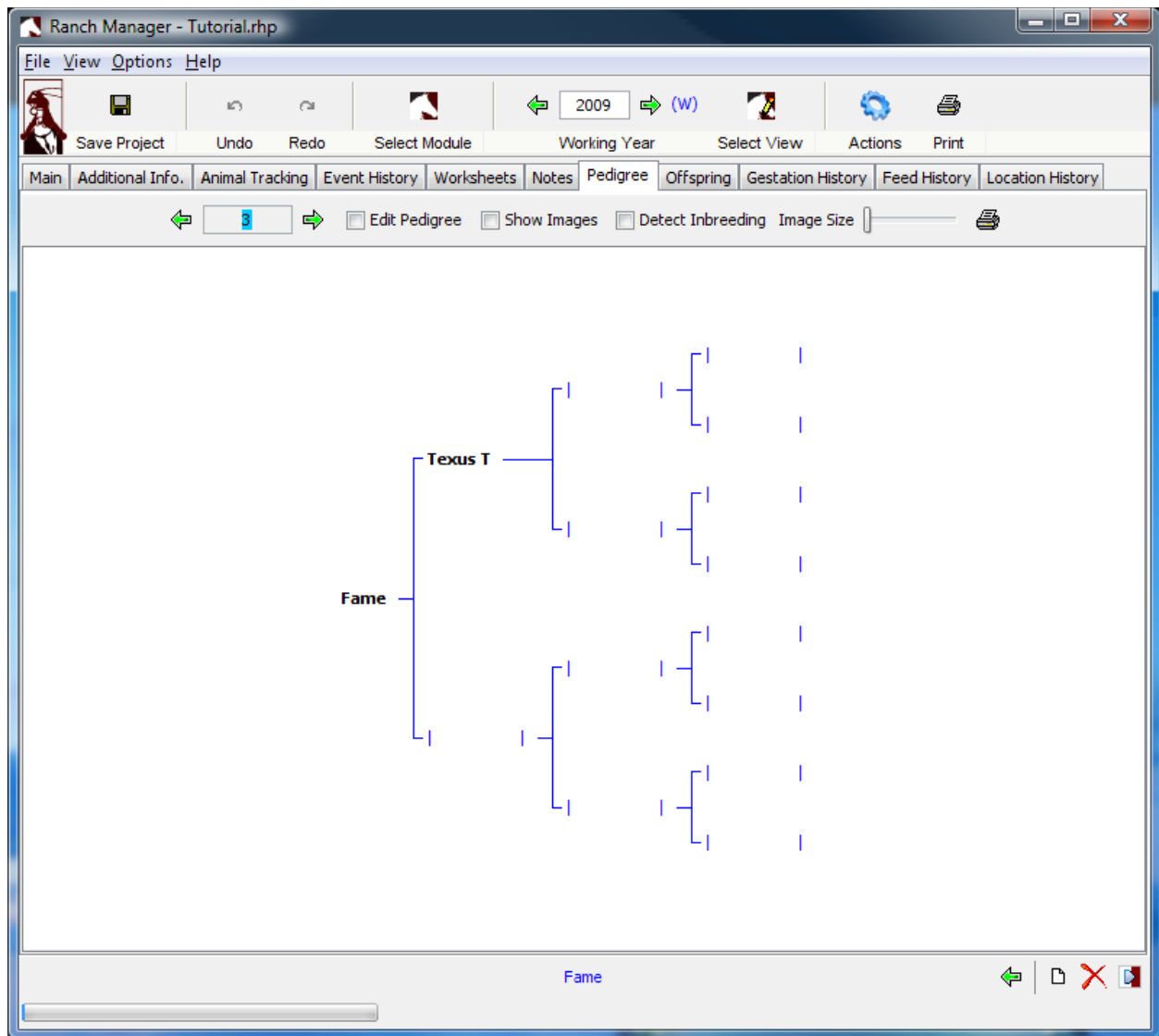
- Display Name:** A text input field.
- Name:** A text input field.
- Microchip:** A text input field.
- Tattoo:** A text input field.
- Tracking #:** A text input field.
- Gender:** A dropdown menu with "Stallion" selected.
- Breed:** A dropdown menu with "--Unknown--" selected.
- Birth Date:** A date picker.
- Birth Ease:** A text input field.
- Owner:** A text input field.
- Markings:** A text input field.
- Other ID:** A text input field.
- Registration Number:** A text input field.
- Country:** A dropdown menu.
- Height:** A text input field.
- Birth Weight:** A text input field.
- Checkboxes:** ☐ Purebred, ☐ Raised, ☐ Twin, ☐ Mark Animal.
- Buttons:** OK, Cancel.

- 13) This interface allows you to quickly fill in the minimal values for an animal (plus a few common extras). In the *Display Name* field enter "Texus T", and then use the tab key until the cursor shows up in the *Owner* field. In the owner field enter "Unknown". Also, note that the *Gender* field is disabled and filled with a value of "Stallion". This is simply because Ranch Manager knows you are creating the sire for an animal, so therefore it must be a "Male". Finally, the value for *Breed* was pulled from Fame's record.
- 14) You can leave the *Birth Date* value blank because we did not raise the animal (*Raised* is not checked), and it's because of this reason that we may not know when the animal was born. We recommend you always enter the information you have though, so you keep accurate records. You can always go and add it later though (we will cover that later). For now, click "OK" to create the animal.



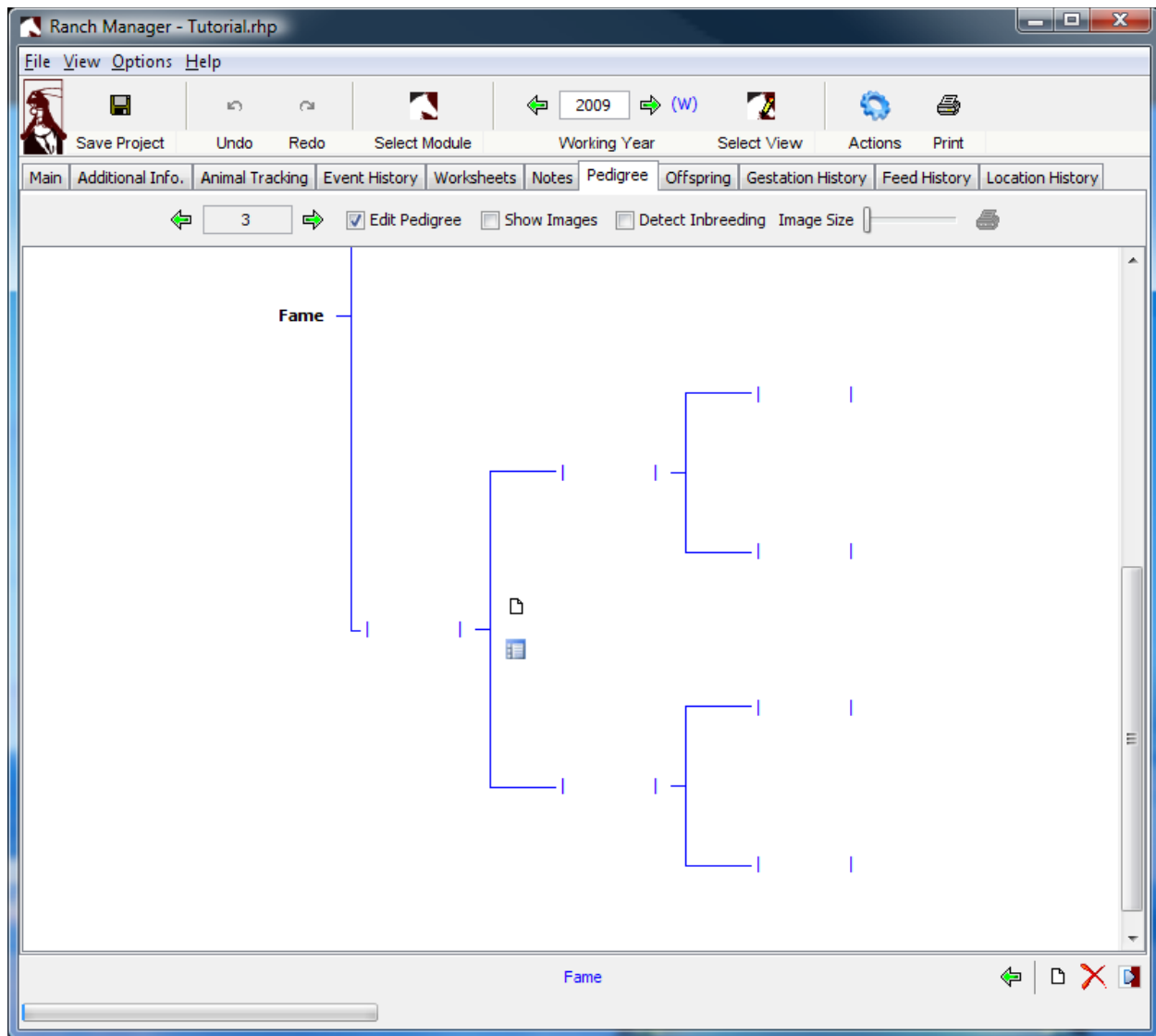
- 15) The **Quick Add** windows will display again (see above), asking if you would like to create the owner "Unknown". This will be the catch-all owner we will use throughout the software to handle the cases where we don't know what the owner might be. Click "Yes".
- 16) You will be taken back to the base **Animal Editor** view. Note that the sire now has a value of "Texus T (Born: N/A)". An animal in Ranch Manager is uniquely identified by the combination of its *Display Name* and the year of birth. So you can have two animals with the same display name, but you cannot have two animals with the same *Display Name*, born in the same year. This usually isn't a problem, because if you do have two animals with the same name, you will probably do something to distinguish the two, so simply include that distinguishing factor in the animals' *display name* values (such as include a color, patches, etc).
- 17) Now, for the *Dam* we could be boring and use the same little blank paper button to the right of the field to *Quick Add* the dam, but let's use the **Pedigree Editor** instead. The **Pedigree Editor** will allow you to select and Quick Add animals directly into its pedigree chart, which you may find useful when filling out generations beyond simply the sire and dam for an animal. To access this view, click on the **Action Tab** at the top labeled *Pedigree*. You will should see the following:

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- 18) To activate the editor, click on the *Edit Pedigree* check box located at the top of the panel. The screen will now add some additional buttons (icons) to the display and you may need to scroll now to see the position where the dam will go, as listed below:

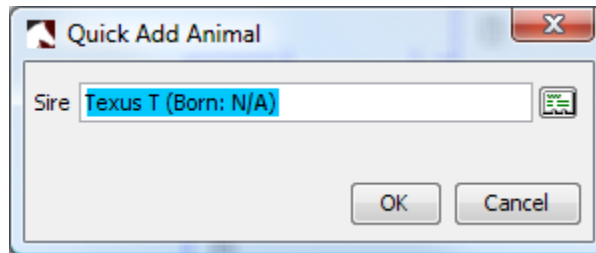
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- 19) Locate the blank sheet of paper to the right of the position where the dam would normally show up in the pedigree. Click the button to bring up the **Quick Add Animal** window.
- 20) Enter the following data:
- a. *Display Name* = "Samantha XL"
 - b. *Birth Date* = "18-Jun-2003" (you can't enter a day that would make her younger than B).
 - c. *Owner* = "Unknown". Notice that as you begin to type, the field auto-fills for you. This happens on all the controls that have a rolodex icon to the right. These fields are called **Auto-Completion** fields, and are used a lot throughout Ranch Manager.
- 21) Click "OK" when done.

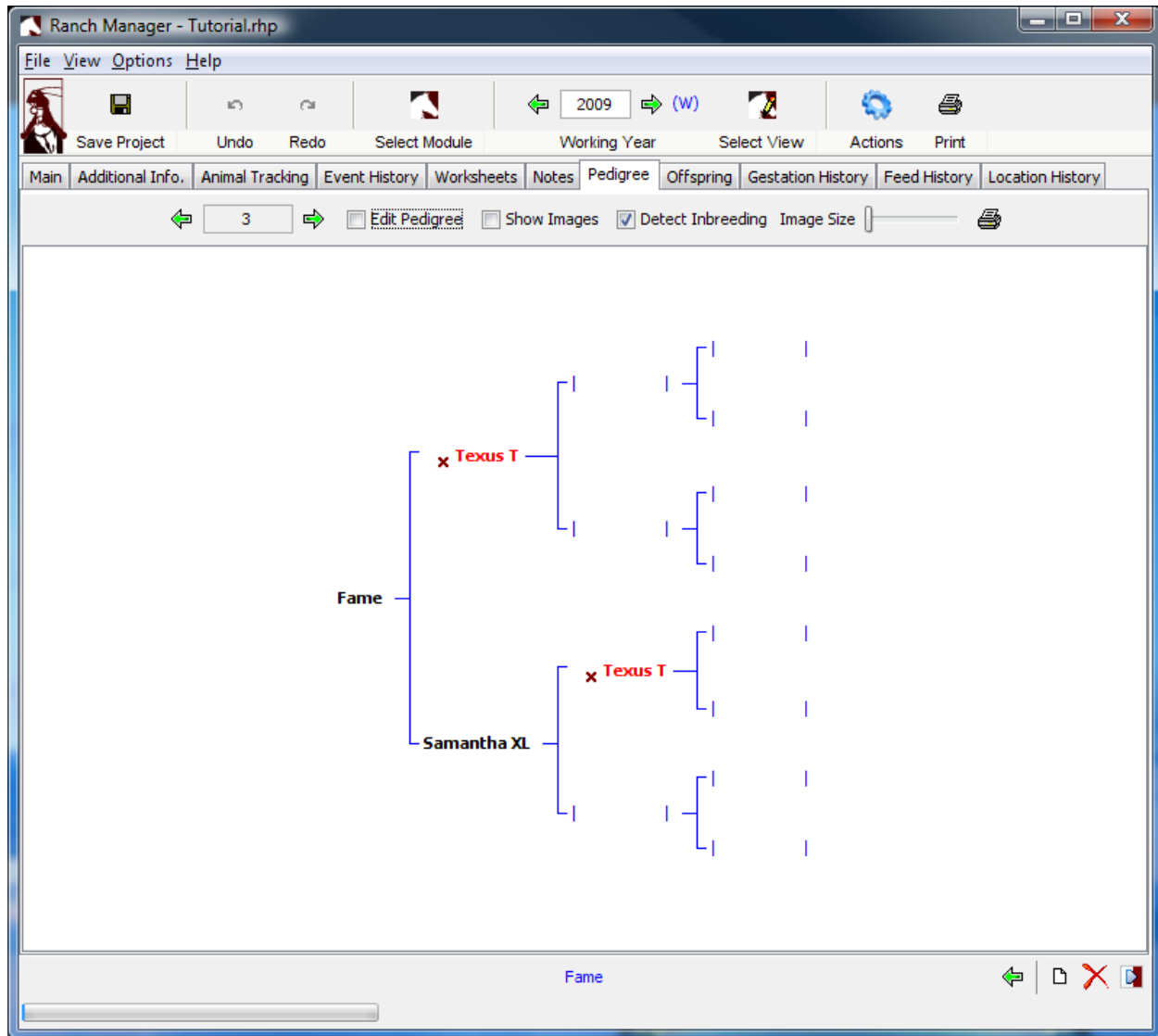
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- 22)** Notice how the pair of buttons beside the dam branch is now also available for the grandparents? This means that you can now enter, or select values for both the sire and dam of Samantha XL (or Fame's maternal grandparents).
- 23)** You may be wondering what the other button is in the group. The little blue list button is used when you know that the animal that should fill that spot in Ranch Manager has already been entered into Ranch Manager, and you just want to select it in. Let's try it. Click on the little blue list button in the branch up and to the right of Samantha XL.



- 24)** Now select "Texus T" from the list, or just begin to type and he will be auto-filled. When done, click "OK".
- 25)** Who knew that Fame was inbred! We know that this couldn't possibly be true, but let's entertain ourselves for the moment. Click on the *Detect Inbreeding* check box located in the top of the panel (to the left of the *Edit Pedigree* value), and uncheck the *Edit Pedigree* value (by clicking on it again). You should see the following:

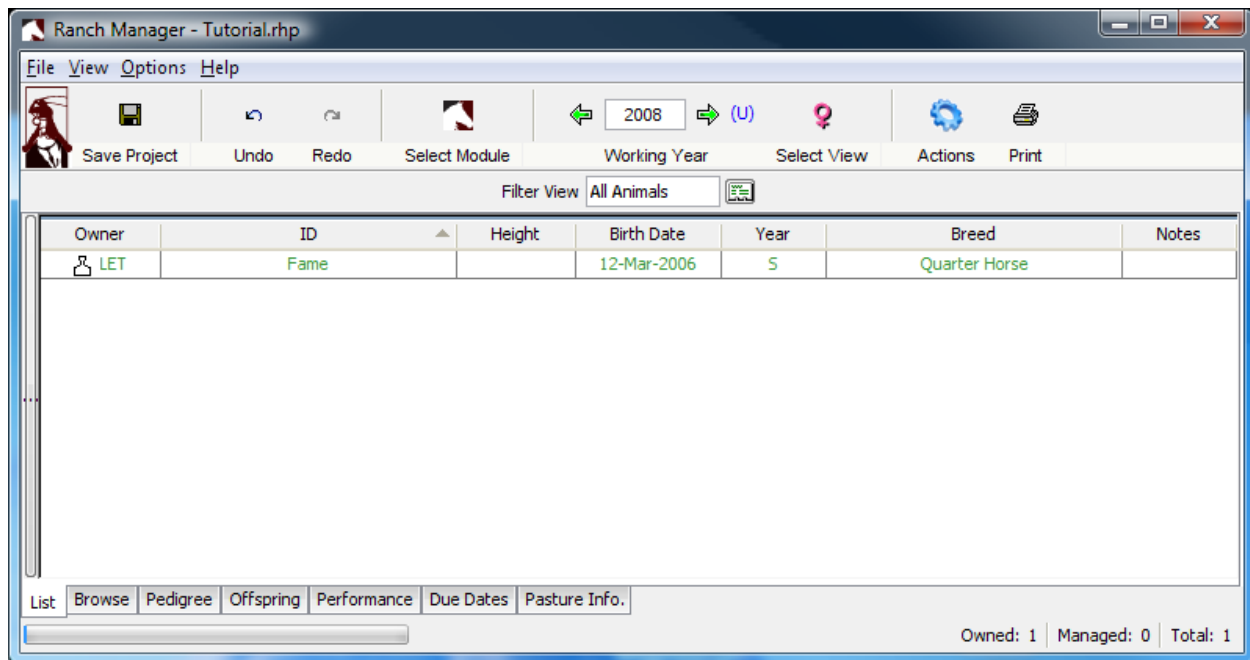
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- 26) Notice how Texus T shows up in Red with a little subscript "x" to the left of his name. This is to indicate instances of inbreeding in Fame's pedigree. You will find this to be a handy tool, in some cases, such as line breeding the inbreeding is expected. In others you may want to avoid it. This comes in handy when doing breeding planning (which we will cover later).
- 27) Since we know Fame isn't inbred, let's reverse the last step. To start click on the *Edit Pedigree* check box to reactivate the editor.
- 28) Now click on the blue list button to the right of the "Texus T" that is currently set as the maternal grandsire of Fame.
- 29) Leave the *Sire* value in the **Quick Add Animal** window set to "—Unknown—" and click "OK". This will clear "Texus T" from that position in the pedigree, and also remove the inbreeding warnings.
- 30) Now let's go back to the **Main** tab of the animal editor. Note how the dam is now filled in. Go ahead and save Fame using the **Save Animal** button in the bottom-right corner.

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- 31) We are done with Fame for the moment. Assuming we were going to begin entering another animal via the **Animal Editor** view, click on the **New Animal** action located in the bottom-right corner (it's the little blank sheet of paper). This will blank the editor out (notice how it says "<New Animal>" at the bottom of the editor panel). Avoid the temptation to begin entering a new animal over top of the old one in the editor; all you will be doing is replacing Fame, with the new animal. Always make sure that when entering a new animal through the **Animal Editor** view to blank the view first using the **New Animal** button.
- 32) To go back to the **Herd Mares** view, move your mouse over the **Select View** control and select **Herd Mares** from the spring menu. Ranch Manager should look like the following:



Fame now appears in your Herd Mares list. But a list is kind of boring with only one animal in it.

****Note:** Notice in the screenshot how Fame is listed in Green, while probably on your screen she is listed in black? This is because the screenshot is viewing the Herd Mares view for the year 2008, and in 2008 Fame was a two-year-old. The herd views in Ranch Manager use color coding to provide a rough age indicator for the animal. Animals listed in blue text are yearlings (or younger), green are two-year-olds, and black is anything older. If you change the year on your toolbar to read 2008, Fame will be listed in green. This is because she was a two-year-old in that year. Be sure to change back to the current year if you decided to experiment.

Let's add another animal, this time we will assume we purchased a Mare from another breeder.

- 1) Instead of going straight to the **Animal Editor** view (which we could), we can use a time-saver by utilizing the **Buy New Animal** action, located under the **Actions** spring control. Move your mouse over the **Actions** control on the **Toolbar** and click on **Buy New Animal**. The **Enter Sale Data** window will appear:

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The screenshot shows a software window titled "Enter Sale Data". It contains the following fields and controls:

- Display Name:** A text input field.
- Tracking #:** A text input field.
- Country:** A text input field with a dropdown arrow icon.
- Gender:** A text input field containing the value "Mare" and a dropdown arrow icon.
- Height:** A text input field.
- Breed:** A text input field with a dropdown arrow icon.
- Birth Date:** A date picker showing "18 Jan" and "2009", with a "Purebred" checkbox.
- Buyer:** A text input field with a dropdown arrow icon.
- Seller:** A text input field with a dropdown arrow icon.
- Sale Date:** A date picker showing "18 Jan" and "2009", with a "Sale Weight" text input field.
- Sale Price:** A text input field.
- Sale Notes:** A large text area for notes.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

- 2) Enter the following into the window:
 - a. *Display Name* = "Fernie SL5 "
 - b. *Gender* = "Mare" (just leave the existing value in place).
 - c. *Breed* = "Paint"
 - d. *Buyer* = <Your Operation Name> (just select it from the list, since you are the one buying the animal).
 - e. *Seller* = "Bob Breeder"
 - f. *Sale Date* = "14-Aug-2005"
 - g. *Sale Notes* = "Bought for breeding stock." (Feel free to ramble on if you like).
- 3) Click "OK" once the data has been entered. You will be asked to *Quick Add* "Bob Breeder". Click "Yes", and you will be asked to *Quick Add* the breed "Paint". Click "Yes" again and you will be taken to the **Animal Editor** view:

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Ranch Manager - Tutorial.rhp

File View Options Help

Save Project Undo Redo Select Module Working Year 2008 Select View Actions Print

Main Additional Info. Animal Tracking Event History Worksheets Notes Pedigree Offspring Gestation History Feed History Location History

Identification

Display Name: **Fernie SL5**

Name

Markings

Microchip

Brand

Passport

Other ID

Tattoo

Registration Number

Tracking #

Country

Breeder: --Unknown--

Characteristics

Gender: Mare

Sire: --Unknown--

Dam: --Unknown--

Surrogate Dam: --Unknown--

Breed: Paint Purebred

Height

Birth Date

Birth Weight

Birth Ease

Color

☐ Purebred ☐ Mark Animal ☐ Twin

☐ Raised ☐ Mark for Sale ☐ Not Managed

Owner

Lion Edge Technologies

Description

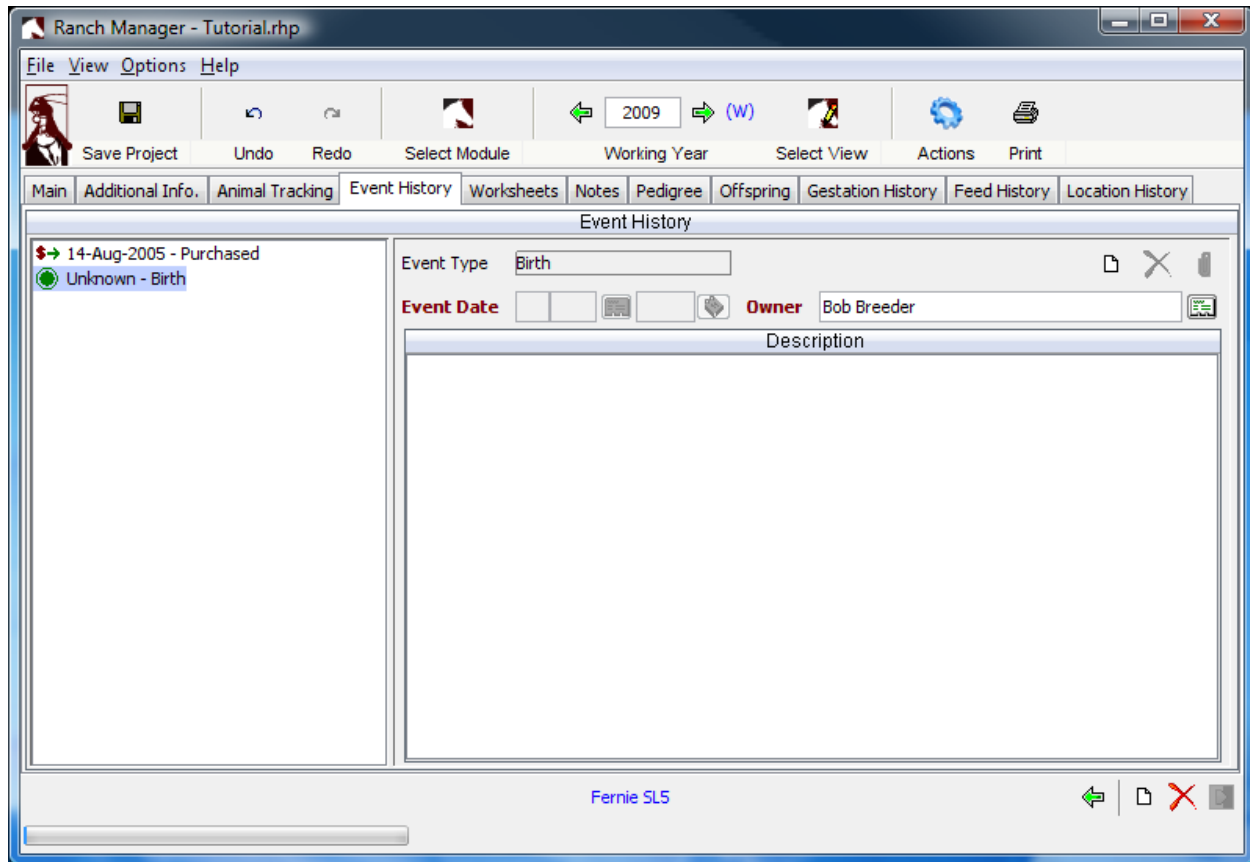
Image

☒ Primary Image

Fernie SL5

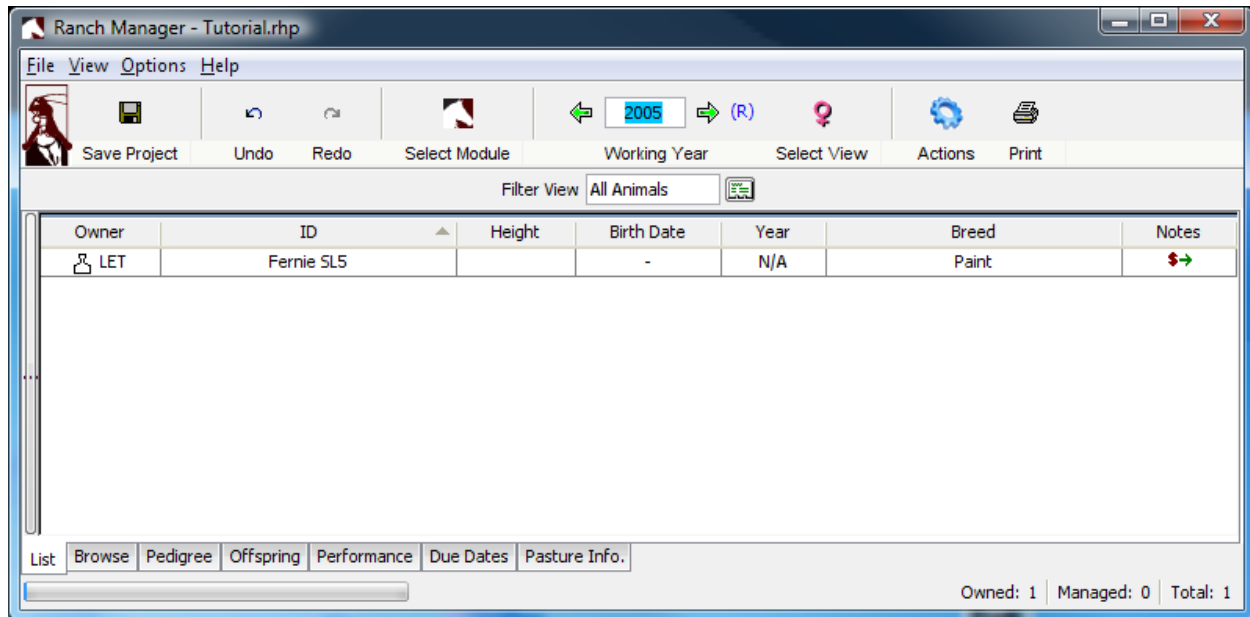
- 4) You can now continue to enter any additional information about the animal, such as pedigree information, IDs and other characteristic data. You may be wondering what that action just bought you. Let's go to the **Event History** action tab to find out. Click on the **Event History** tab located at the top of the editor panel.
- 5) The **Event History** action tab will display the chronological history of events that have been attached to this animal. All animals begin with a "Birth" event. You can see that listed in the panel on the left. If you click on it (please do), the panel to the right will populate with the birth event's attachment:

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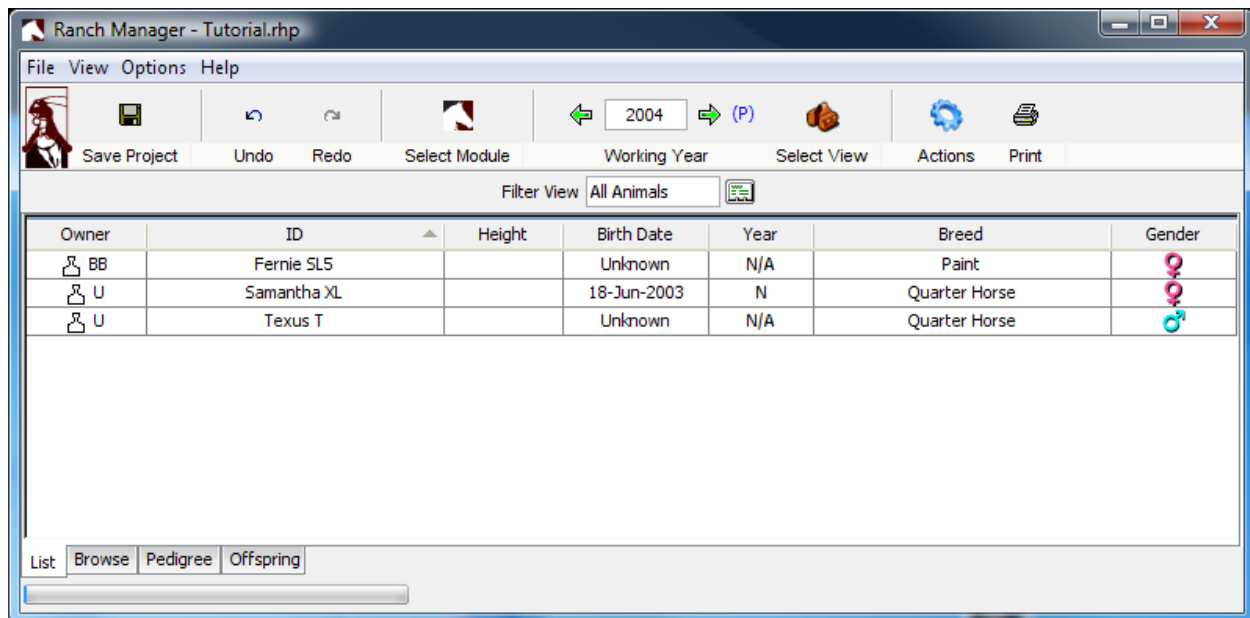


- 6) Notice how the *Owner* value is set to “Bob Breeder”. This is because, as far as we know, Bob was the owner of the animal at birth. Click on the *Purchased* event from the panel on the left.
- 7) In this view you can see that the *Buyer* is you, and this is effectively representing the changing of ownership for the animal. This is significant, because it tells Ranch Manager when the animal entered your herd. If you were to go and view the **Equine Herd-Herd Mares** view for the year 2005 you would see Fernie SL5 listed, with the little purchased icon listed in the *Notes* column of the view. This indicates that the animal was purchased in 2005. Let’s take a look. Move your mouse over the **Select View** control and click on **Herd Mares**.
- 8) To further the point of animals entering your operation, observe Fame’s birth date of 2006. Now change the **Working Year** control to read 2005 in the **Toolbar** (if you type it in, press *Enter* when done to commit the change, otherwise just use the left arrow button to get there). You should see the following:

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- 9) Where did Fame go? Well, since she was not yet born, she is not displayed. Also notice the purchased symbol in the *Notes* column beside Fernie SL5. This indicates that she was purchased this year. Now click on the left green arrow in the **Working Year** control to move the year back to 2004.
- 10) It should not be a surprise to see the view empty. This is simply because you did not own Fernie in 2004, so therefore she is not displayed. So where did she go? Move your mouse over the **Select View** spring control and select **Unmanaged Animals** to find out.

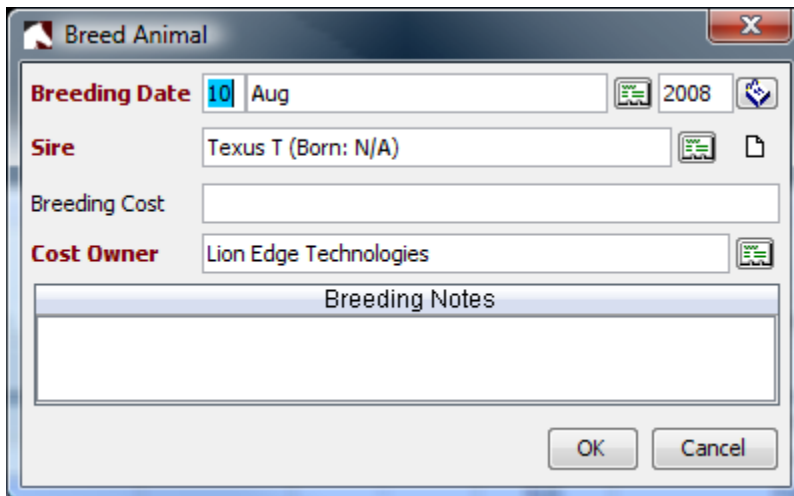


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- 11) In the year 2004, Fernie (Samantha, and Texus T) were not yet in your herd. The **Unmanaged Animals** view will show all the animals that are related to your herd, or are no longer in your herd for the currently selected working year. This is useful, because it allows you to still edit an animal even if it has left your herd; or, correct for a mistake if you accidentally make an animal disappear from your herd views (more on this later).
- 12) Change the working year back to the current year. Notice how Fernie is no longer listed in the **Unmanaged Animals** view. This is because, currently, Fernie is an active animal, and you will find her listed in your **Herd Mares** view. Go back to the **Herd Mares** view now (I'm not going to tell you how to do this as you should know by now).

The last way to enter an animal is through the **Foal Animal** action. To maximize the benefits here, we will breed an animal first.

- 1) Select Fernie from the **Herd Mares** view (don't double-click; we just want to highlight her). Now go to the **Actions** control and click on **AI/Breed Animal**.



- 2) Enter the following values:
 - a. *Breeding Date* = "10-Aug" of last year.
 - b. *Sire* = "Texus T"
- 3) Click "OK".
- 4) If you flip the working year (on the toolbar) back to last year, you will note a little test tube icon beside Fernie. This simply indicates that she was AI or Bred in that year. Flip back to the current year when done.
- 5) Click on the **Due Dates** sub-view located at the bottom of the **Herd Mares** view.
- 6) Note how it shows the expected due date for Fernie under the *Due Date* column, and it also lists Texus T as the potential sire. Click on the **List** sub-view to go back; it's a tab at the bottom of the **Herd Mares** view. By going to the **Due Dates** sub-view you did not leave the **Herd Mares** view, you just changed the data that you are displaying about the Herd Mares in your herd.
- 7) Now let's have that Foal, shall we? Click on Fernie again to highlight her, and then click on **Foal Animal** from the **Actions** control.

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- 8) The **Enter Birth Date** window will appear, enter “14-Jul” for this year in the *Birth Date* value and click “OK” (Don’t worry if the 14 of Jul isn’t here yet, we are just working with test data). This will take you to a partially completed **Animal Editor** view:

The screenshot shows the Ranch Manager - Tutorial.rhp application window. The menu bar includes File, View, Options, and Help. The toolbar contains icons for Save Project, Undo, Redo, Select Module, Working Year (set to 2009), Select View, Actions, and Print. The main window is divided into several sections:

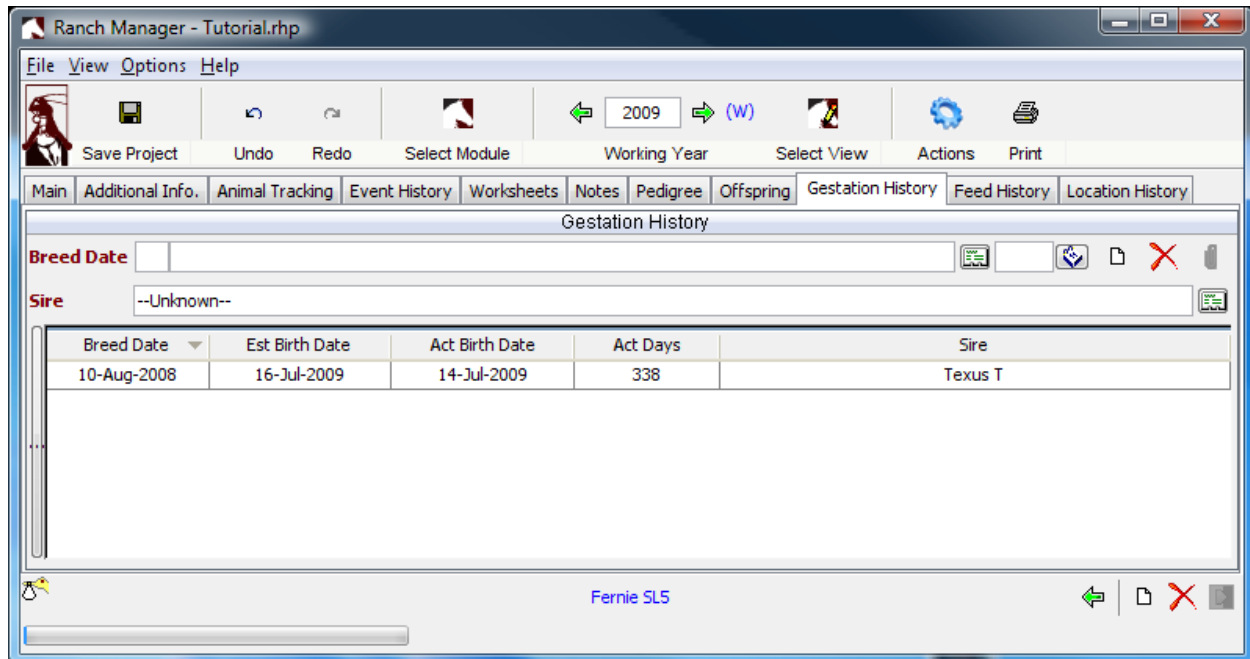
- Identification:** Fields for Display Name, Name, Markings, Microchip, Brand, Passport, Other ID, Tattoo, Registration Number, Tracking #, Country, and Breeder (set to --Unknown--).
- Characteristics:** Fields for Gender (set to Mare), Sire (Texus T (Born: N/A)), Dam (Fernie SL5 (Born: N/A)), Surrogate Dam (--Unknown--), Breed (Quarter Horse), Height, Birth Date (14 Jul, 2009), Birth Weight, Birth Ease, and Color. There are also checkboxes for Purebred, Mark Animal, Twin, Raised (checked), Mark for Sale, and Not Managed.
- Owner:** Field for Lion Edge Technologies.
- Description:** A large text area for describing the animal.
- Image:** A section for uploading an image, with a checkbox for Primary Image.

At the bottom of the window, there is a button labeled "<New Animal>" and a status bar.

- 9) In order to complete the record we need to provide a value for *Display Name*. Enter “Freckles TN”.
- 10) Change the *Gender* to “Stallion”.
- 11) Notice how the *Sire* and *Dam* values are populated correctly for you? Normally the breed would be too, but in this case, Texus T is a Quarter Horse, and Fernie is a Paint. So we may want to be more accurate and update the *Breed* value to be “Quarter Horse X Paint”. Alternatively, you could change the breed percentage (the field to the right of the breed value) to mixed and leave Quarter Horse as the breed. Really up to you, so you decide.

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- 12) Save the animal. If you created a new breed “Quarter Horse X Paint” you will be asked to add it, so click “Yes”. Notice how the **Save Animal** action went gray after you pressed it? This is because there are currently no new changes to the animal to save, and is Ranch Manager’s way of telling you this.
- 13) Let’s now take a look at Fernie’s record. There’s a quick way to navigate directly to her record right from Freckles’s view. To navigate to Fernie, click on the *Dam* field label.
- 14) Take a look at the bottom-left corner of Fernie’s record. You will see a symbol that looks like a stork (assuming the year on the toolbar is still set to the current year). This means that the animal had one or more Foals in the currently selected working year. Next click on the **Event History** action tab.
- 15) Note the progression of events? Feel free to select them from the list on the left and observe the data value settings on the right. If you ever need to change event data after you enter it, this is where you come to do it.
- 16) Twins are sometimes possible with Mares, so to add additional Foals, simply go back to the **Herd Mares** view, select “Fernie” and use the **Foal Animal** action again. Do that now, and create another Foal called “Missy NT”. Don’t forget to apply the same change to the breed (e.g.: set it to Quarter Horse X Paint, or indicate “Mixed” as the percentage).
- 17) Navigate back to Fernie’s record (you can click on the *Dam* link again if you like), and click on the **Gestation History** action tab now. You should see the following:



- 18) Each year that Fernie Foals and is associated with a specific breeding event. The Actual Days between conception and delivery can be calculated. Open records may exist in this view, if the animal was bred, but no birth was recorded (or the Foal hasn’t arrived yet).
- 19) Go back to the **Herd Mares** view. Where’s Freckles and Missy? Navigate to the **Foal Crop** view by using the **Select View** control to find them. Since both Freckles and Missy are Foals (in the current year) they are not listed in your Herd Mares view. Go back to the **Herd Mares** view (it’s more interesting for the moment since it has more data).

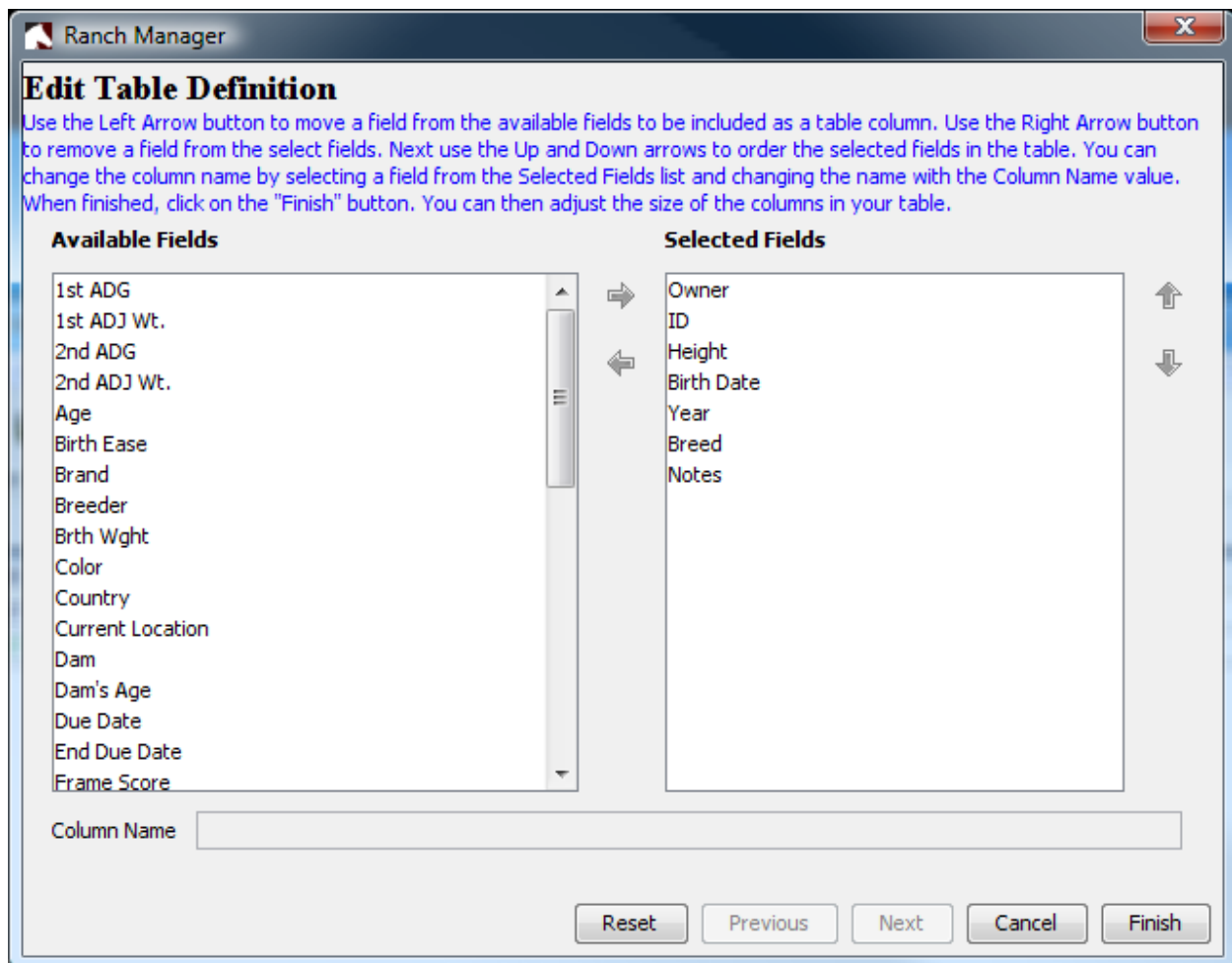
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Well done! Time for some coffee? Go ahead and save the tutorial project by clicking on the **Save Project** control located on the **Toolbar**. You can now shutdown Ranch Manager and take a break if you want (or continue). If you want to continue, please shutdown Ranch Manager anyway (just to show a point). After it is shutdown, start Ranch Manager back up. Notice how Ranch Manager reopens the tutorial project, and leaves you back in the **Herd Mares** view? Ranch Manager will always reopen the last project that it was working with, and will leave you in the **Herd Mares** view (regardless of what view you were in when you closed the software).

Viewing & Editing Animals

The view and sub-view system in Ranch Manager makes working with and viewing your data efficient. We also allow you to customize some of the views in by selecting different data values to display. Let's start with the **Herd Mares** view. Many of you will not use the "Year" that is symbolized by a letter (marking the tattoo letter year). We can customize the **Herd Mares** view (and others).

- 1) Click on the **Options** menu; select **Equine Herd**, followed by **Customize Herd Mares**. The **Edit Table Definitions** window will appear.

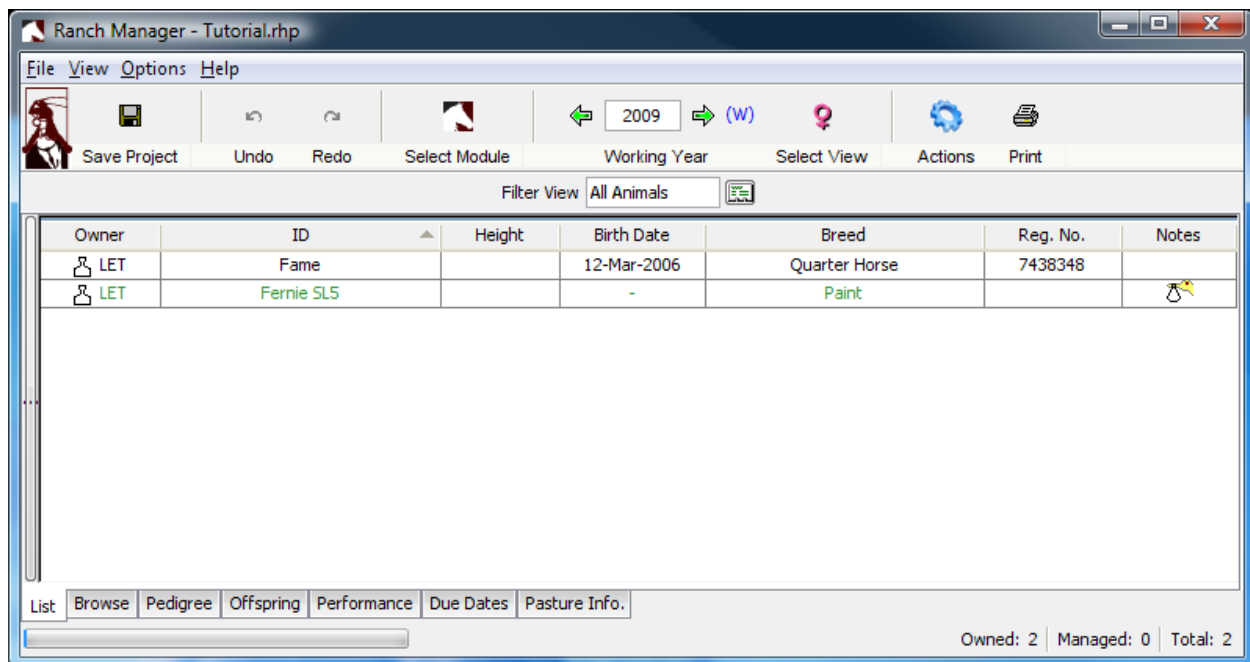


- 2) There are two list controls in this window. The one on the left lists the entire set of available fields that you can show in the tables showing an Equine record. The table on the right lists all the fields that are currently being displayed (as columns) in the table you are customizing. The fields listed on the right, are also in the order that they will be displayed (from left to right) as columns in the table. Start by clicking on the **Year** value

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in the **Selected Fields** list. The green arrow facing to the left will become available. Click on that arrow, to move this field back to the **Available Fields** list.

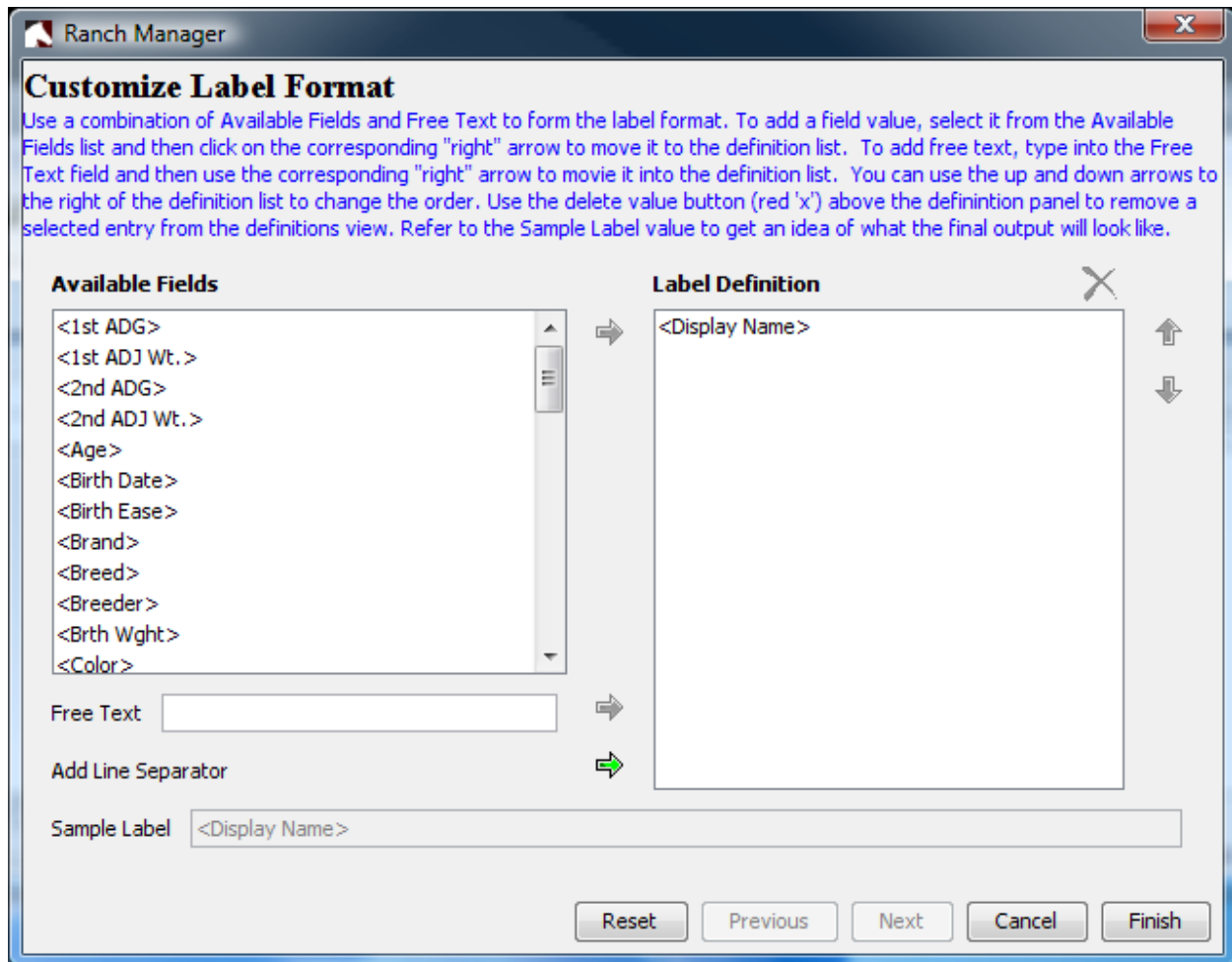
- 3) We could stop here, but let's just assume we would like to be able to see the animal's registration number in the **Herd Mares** view. Select it from the **Available Fields** list, and use the green arrow facing to the right to move it to the **Selected Fields** list.
- 4) Now, as a title, "Registration Number" as a column header is a bit long; and will take up too much space when printing, and viewing. We can abbreviate it. Select *Registration Number* from the **Selected Fields** list. It will populate the *Column Name* field located at the bottom of the window. Now change the value in the *Column Name* field to "Reg. No." Note how it changes in the **Selected Fields** list.
- 5) One last thing. We want to move the *Reg. No.* column to show up before *Notes* in the table. To do this, click on *Reg. No.* in the **Selected Fields** list and then click on the green arrow facing up on the right side of the window. You will only need to click it once to put this field into position, but you're welcome to place the field wherever you like.
- 6) Click "Finish", your **Herd Mares** window should now look something like the one below:



Since we are in the mood of customizing; let's customize the way labels appear in the **Pedigree** sub-views.

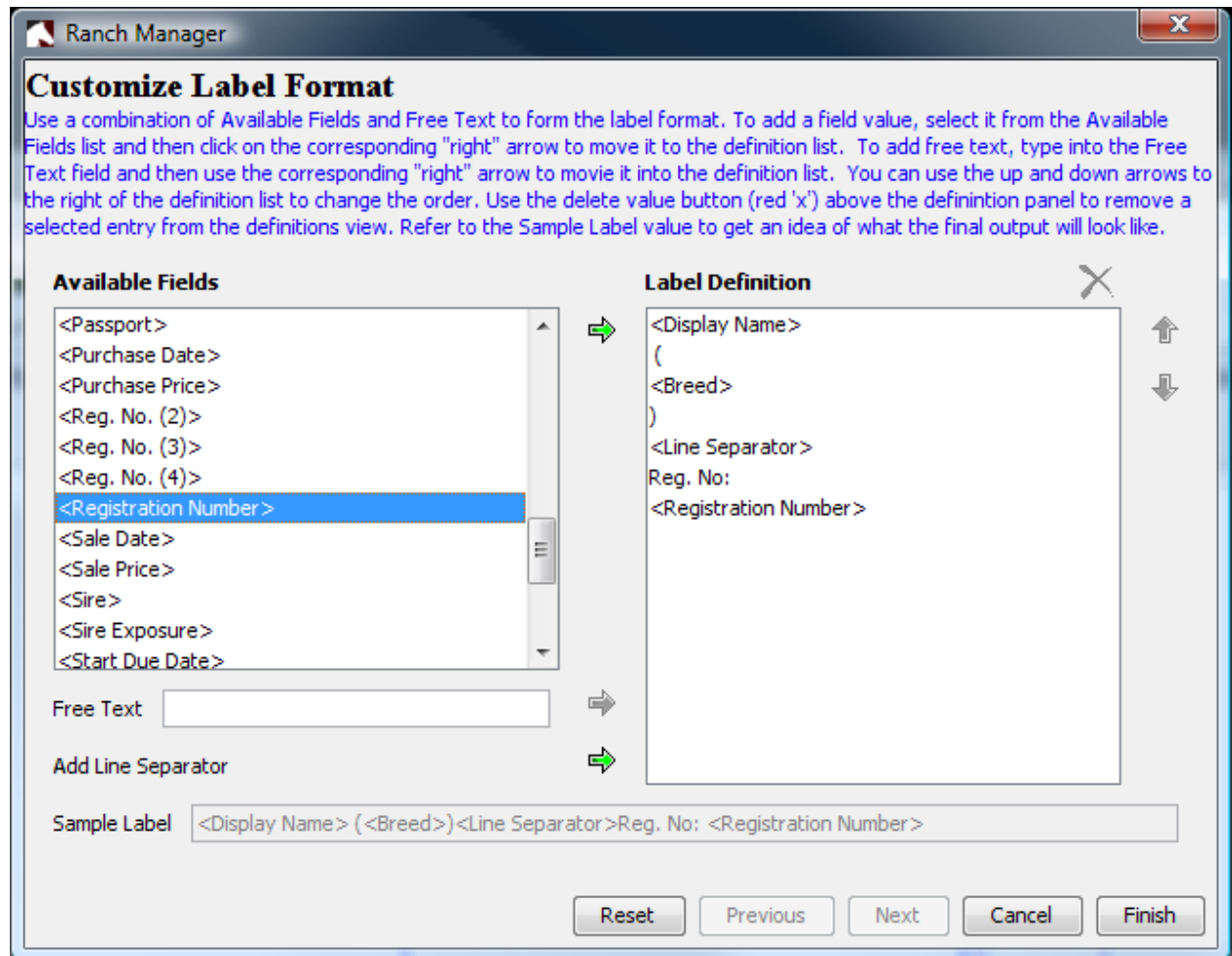
- 1) Click on the **Options** menu; select **Equine Herd**, followed by **Customize Pedigree Label Format**. The **Customize Label Format** window will appear.

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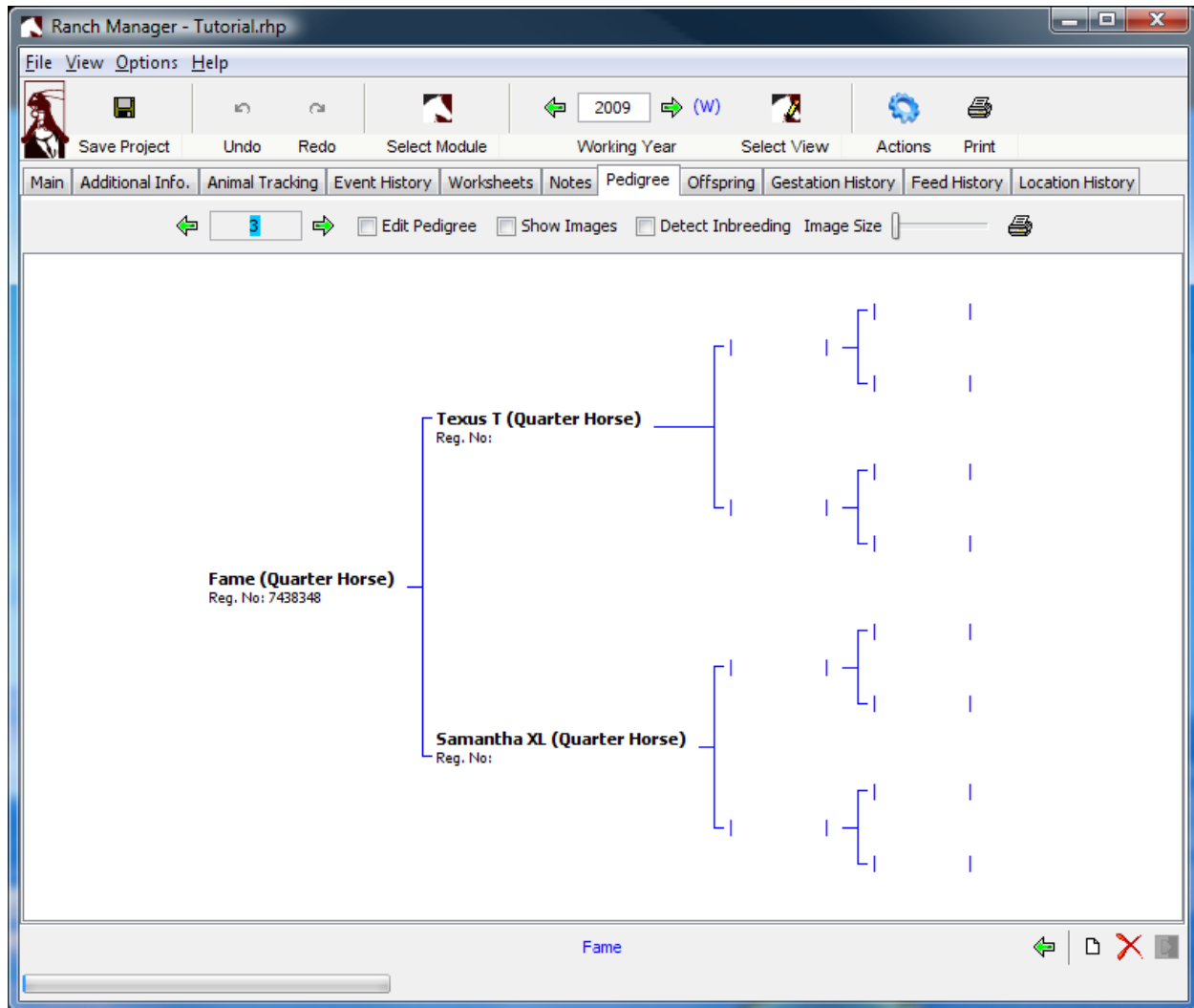
- 2) This interface is similar to the one for customizing a table view. The main difference is that is geared towards customizing a label value. We would like to add *Breed* to the pedigree view (in addition to the *Display Name* which is already present). Let's add *Breed* in parentheses after the *Display Name*. Start by typing " (" into the *Free Text* field located under the **Available Fields** list. Be sure to include the space at the start, so it does not butt directly up against the *Display Name*.
- 3) Click on the right facing green arrow to the right of the *Free Text* field to add this text to the formatted label.
- 4) Next select *Breed* from the **Available Fields** list and click on the right facing green arrow to the right of the list to add it to the label format.
- 5) Now close off the parentheses, by entering ")" into the *Free Text* field and click on the green arrow to move the closing parentheses to the label format.
- 6) Let's do one more thing. Let's add a second line with the Registration Number in it.
- 7) Click on the Right facing Green arrow beside the *Add Line Separator* label.
- 8) Type "Reg. No: " in the *Free Text* value.
- 9) Use the appropriate green arrow to move it over.
- 10) Now move the <Registration Number> field over from the *Available Fields* list.
- 11) When finished you should have something that looks like this:

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- 12) Inspect the *Sample Label* value to get a glimpse of what the label will look like. Click "Finish" when you are satisfied. You will be taken back to the **Herd Mares** view.
- 13) So let's find out how we did. Double click on Fame in the **Herd Mares** list. This will take you to the **Animal Editor** view for Fame.
- 14) Click on the **Pedigree** tab located at the top. You should see something like this:

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15) The pedigree will now include the *Breed* and the *Registration Number* values for the animals displayed in the pedigree.

It's time to explore this **Pedigree** sub-view a little further. Let's add some images to the animals first, starting with Fame.

- 1) Since Fame is already up in the **Animal Editor** view, click on the **Main** tab located at the top of the editor view.
- 2) In the bottom-right corner you will see a panel labeled *Image*. In the top-right corner of that panel you will see a little folder icon with an arrow above it. Click on this button to select an image for Fame (we've included some samples).
- 3) By default, the **Open Image** window will open to the *images* folder located within the *data* folder which is located in the Ranch Manager Installation folder. We recommend

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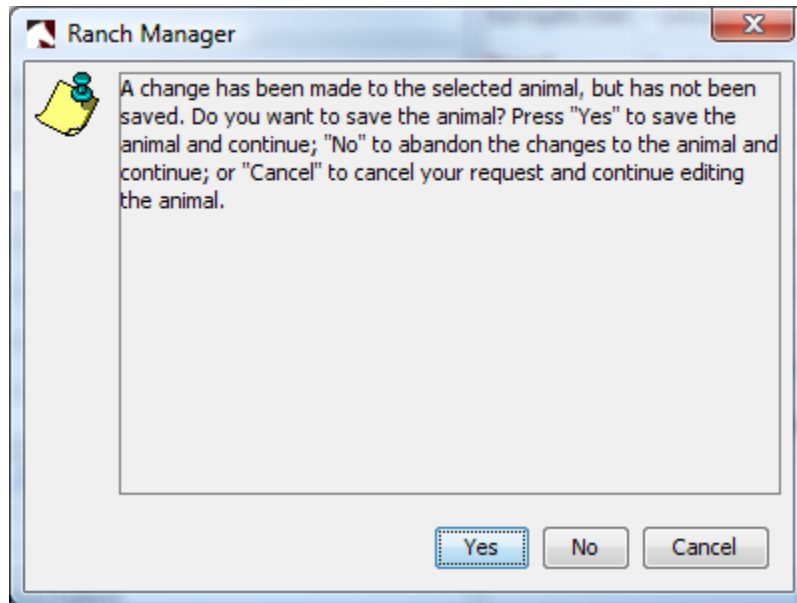
you store your animal images here so that they can be easily backed-up with the rest of your data. Click on the image labeled *Sample-1.jpg* and click "Finish".

- 4) The editor view for Fame should now look something like this.

The screenshot shows the 'Ranch Manager - Tutorial.rhp' application window. The interface includes a menu bar (File, View, Options, Help), a toolbar with icons for Save Project, Undo, Redo, Select Module, Working Year (2009), Select View, Actions, and Print. Below the toolbar is a tabbed interface with tabs for Main, Additional Info., Animal Tracking, Event History, Worksheets, Notes, Pedigree, Offspring, Gestation History, Feed History, and Location History. The 'Main' tab is active, displaying the 'Identification' and 'Characteristics' sections. The 'Identification' section contains fields for Display Name (Fame), Name (Fame 47L), Markings, Microchip, Brand, Passport, Other ID, Tattoo (L71 T7N), Registration Number (7438348), Tracking #, Country, and Breeder (--Unknown--). The 'Characteristics' section contains fields for Gender (Mare), Sire (Texus T (Born: N/A)), Dam (Samantha XL (Born: 2003)), Surrogate Dam (--Unknown--), Breed (Quarter Horse), Height, Birth Date (12 Mar 2006), Birth Weight, Birth Ease, Color, and checkboxes for Purebred, Mark Animal, Twin, Raised, Mark for Sale, and Not Managed. Below these sections are fields for Owner (Lion Edge Technologies) and Description. The 'Image' panel at the bottom right shows a photo of a dark horse in a field, with a checkbox labeled 'Primary Image' checked. The name 'Fame' is displayed at the bottom center of the window.

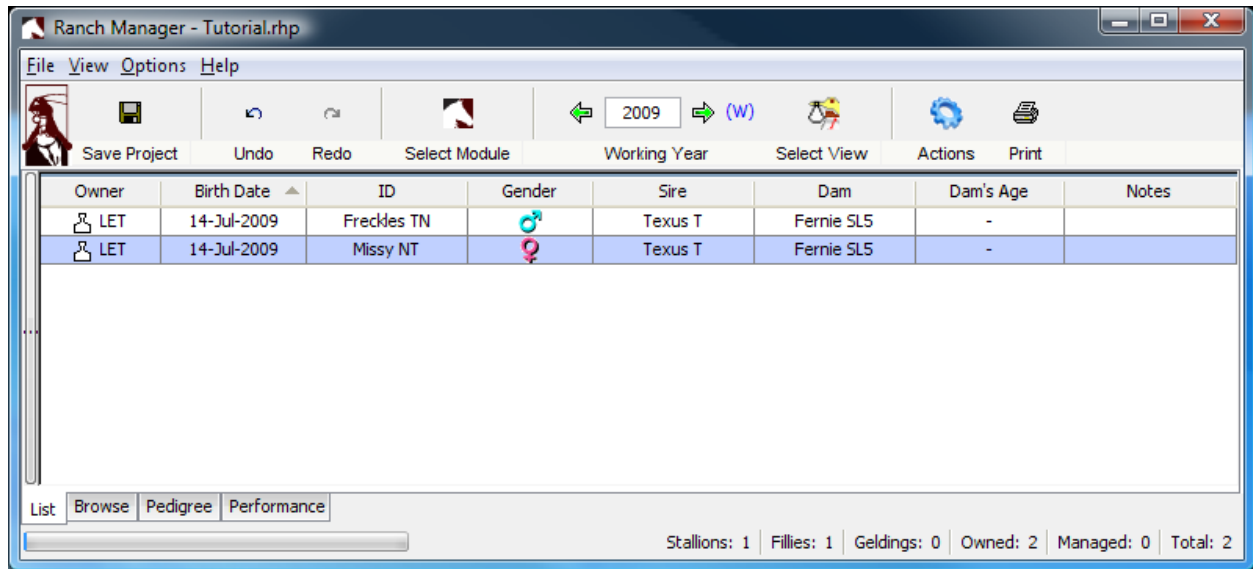
- 5) The image for Fame now appears in the *Image* panel. You can repeat this process to add multiple images of Fame. You use the check box labeled *Primary Image* to select which image you want to use as the primary image for Fame. This is the image that will be displayed in pedigrees, and printouts. It is grayed out at the moment because we currently only have one image linked for Fame. The left and right green arrow controls allow you to flip between images when you have more than one linked.
- 6) Click on the *Dam* link field above to navigate to Fame's dam, Samantha XL.

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- 7) Since we did not save Fame's record after changing it (by adding a link to a picture), we need to do so now before we change the focus of the editor. Click on "Yes".
- 8) We will now be viewing Samantha in the editor view. Click on the open image action located in the *Images* panel, and this time select *Sample-2* for the image for Samantha and click "OK".
- 9) Save Samantha by clicking on the **Save Animal** action located in the bottom-right corner.
- 10) Navigate back to the **Herd Mares** view using the **Select View** control from the **Toolbar**.
- 11) Double click on Fernie's record in the list of Herd Mares.
- 12) Use the open image action to link Fernie to the image "Sample-3" and save Fernie when done.
- 13) Now, instead of going back to the **Herd Mares** view, let's go to the **Select View** control and click on **Foal Crop**. You will find both Missy and Freckles listed here.

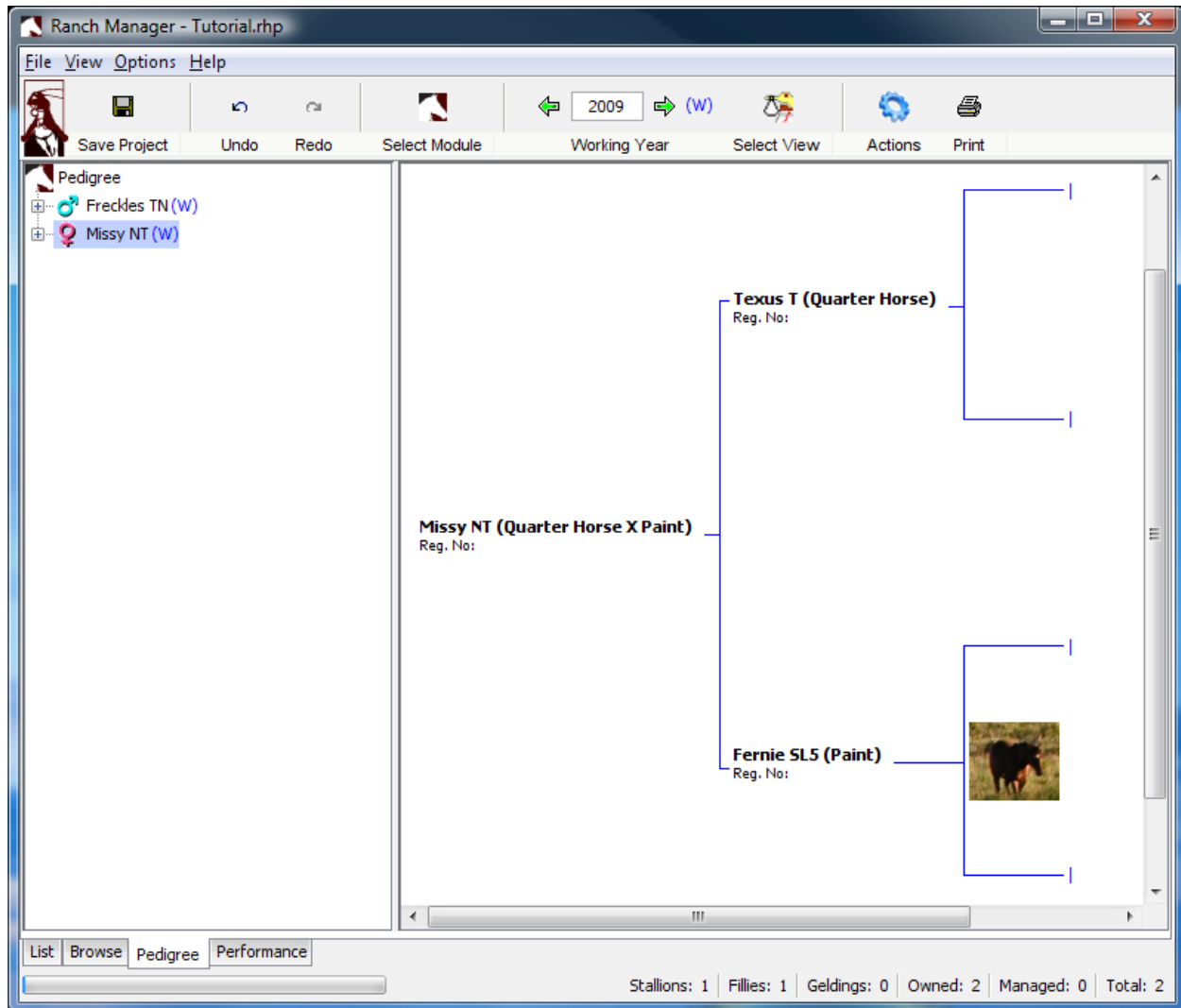
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14) This view presents all the animals that are Foals in the currently selected working year. This view provides yet another convenient view of your animals, as you can see the history of the animals born on your operation. Take a look at the list of sub-views available for the **Foal Crop** view. Click on the **Pedigree** view sub-view tab.

15) Now click on Missy from the list on the left. You should see something like the following:

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- 16) The **Pedigree** sub-view is available in most of the animal views provided in Ranch Manager. Notice the little "+" symbol located to the left of Missy (and Freckles) in the list? Click on the "+" symbol beside Missy. You will see Texus T and Fernie SL5 listed indented and under Missy. Just like the pedigree. This control allows you to expand a pedigree to an unlimited degree. If you put the data in, you can open a pedigree all the way down for an animal.
- 17) Click on Fernie SL5 under Missy and the Pedigree panel on the right will populate with Fernie's pedigree.

The **Pedigree** sub-view only offers editing capabilities from within the **Animal Editor** view. Since we are on the topic of Equine family trees, let's have a look at the opposite view.

- 1) Click back on the **List** sub-view, this will take you back to the list view for Foals.
- 2) Navigate to the **Herd Mares** view and click on the **Offspring** sub-view tab located at the bottom of the view.

- 3) You will see Fame listed with Missy on the panel on the left. Notice how Fernie is the only Mare with a “+” symbol beside her name? This is because she is the only animal (currently) that has any offspring recorded in Ranch Manager. Click on the “+” symbol to expand it. You will see Freckles and Missy listed, indented beneath Fernie. This is because Freckles and Missy are direct offspring of Fernie. As Fernie has more Foals more animals will show here. As her Foals begin to have Foals, the “+” symbol will show up beside the offspring allowing you to open the tree further. This allows you to see all the animals directly, and indirectly descending from any one animal in the software. If you click on any animal in the tree it will display the animal’s pedigree on the right. Many will find this combination of lineage views useful.

The **Offspring** sub-view is also available in almost all of the animal list views in Ranch Manager.

Another convenient sub-view that we will take a look at now is the **Browse** sub-view.

- 1) Since we are already in the **Herd Mares** view, let’s go to the **Browse** sub-view for the Herd Mares by clicking on the sub-view tab at the bottom of the view.
- 2) You will see Fernie, and Fame listed on the left. Click on Fernie.
- 3) Fernie will be populated into an **Animal Editor** panel filling the larger, right side of the panel. This provides a lot of convenience and flexibility, as it allows you to quickly flip between animals in the list views, and see their details on the right. Try it, click on Fame, then Fernie.
- 4) Also, the tab that is being displayed on the **Animal Editor** panel will remain when you change selections, this will allow you to quickly compare or change animal values. Try it, select the **Event History** tab, and then switch between animals.

Searching Your Animal Database

Sometimes it is convenient to take different views of your data. The ability to do queries on your animal database is useful for many. One of the most common searches includes, just show me all of the animals I have entered so far. Let's start with that one.

- 1) To get to the **Animal Search** view, use the **Select View** control and select **Animal Search**. The main elements of this panel are illustrated below:

Search Criteria Panel Perform Search Button

Ranch Manager - Tutorial.rhp

File View Options Help

Save Project Undo Redo Select Module Working Year 2009 (W) Select View Actions Print

Identification

Dis. Name Tracking Number

Characteristics

Gender Breed Bth. Ease

Note & Event Search

| Type | Start Date | End Date | Search Term |
|------|------------|----------|-------------|
|------|------------|----------|-------------|

General Search

Search Value

Managed Adult Animals

| Owner | ID | Height | Birth Date | Year | Breed | Gender |
|-------|----|--------|------------|------|-------|--------|
|-------|----|--------|------------|------|-------|--------|

Records Found: 0

Search Results Panel

- 2) There are two primary panels that make up the **Animal Search** view. The **Search Criteria Panel** is where you indicate the limiting factors for searching. The **Search Results Panel** is where the results of the search are displayed. To start the search, simply click on the **Perform Search Button**. Do that now.

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| Owner | ID | Height | Birth Date | Year | Breed | Gender |
|-------|-------------|--------|-------------|------|-----------------------|--------|
| LET | Fame | | 12-Mar-2006 | S | Quarter Horse | ♀ |
| LET | Fernie SL5 | | - | N/A | Paint | ♀ |
| LET | Freckles TN | | 14-Jul-2009 | W | Quarter Horse X Paint | ♂ |
| LET | Missy NT | | 14-Jul-2009 | W | Quarter Horse X Paint | ♀ |
| U | Samantha XL | | 18-Jun-2003 | N | Quarter Horse | ♀ |
| U | Texus T | | - | N/A | Quarter Horse | ♂ |

- 3) The above will result, and it will list every animal you have entered into the system so far. This search can be very useful, because there are times when you may make a mistake, and an animal doesn't appear in the view you expect it to. Performing this search and then double-clicking on the animal in question will take you back to its editor where you can figure out what happened.
- 4) Let's get a little more creative. This time, we will search for only animals that are managed by your operation. To do this, simply click on the *Managed* check box in the **Search Criteria Panel** followed by clicking on the **Perform Search Button**.
- 5) Samantha and Texus T, will disappear from the search results as you do not own these two animals. Let's do another one.
- 6) This time I only want to bring up animals that have "Fam" in their Display Name. Type "Fam" in the *Display Name* field, uncheck the *Managed* field and click on the **Perform Search Button**.
- 7) Fame will be the only animal displayed. The *Display Name* search criteria field is the only one that will allow you to do a partial search on a specific field. All the other ID and Characteristics fields will do an exact match comparison when filtering search results. Let's do one more.
- 8) Click on the *Dis. Name* label itself, and select *Reg. #* from the popup menu. Now type "7438348" into the search criteria field now labeled *Reg. #*. Click on the **Perform Search Button** now.

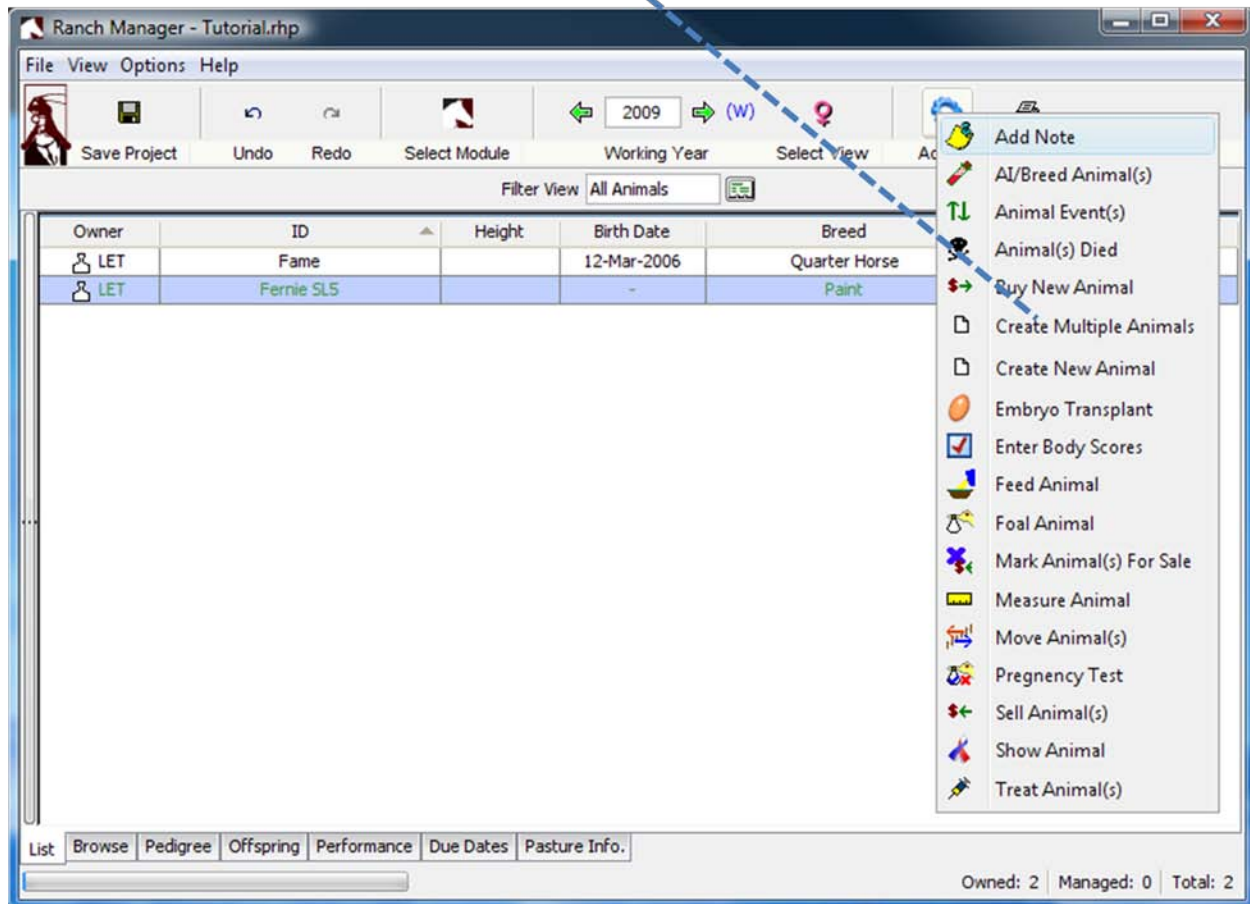
- 9) Again, Fame will be the only result displayed. This is because she is the only animal with that exact Registration Number. Change the *Breed* value to "Paint" and leave the *Reg. #* value alone. Click on the **Perform Search Button**.
- 10) No results will be displayed. This is because you do not have any animals in your system with that registration number, and have a breed of "Paint". If you change breed back to "Quarter Horse", and perform the search Fame will appear as she is the only animal that matches that criteria.
- 11) Another common type of search is to do a search against the Notes and Events data recorded against animals. Let's start by clearing out the current search criteria. Clear out the *Reg. #* and *Breed* fields.
- 12) In the center you will find a panel labeled *Note & Event Search*. Click on the little paperclip button to add a search criteria.
- 13) From the *Type* label drop down select "Purchase Event".
- 14) Enter "1-Jan-2005" in the *Start Date* field, and "31-Dec-2005" in the *End Date* field.
- 15) Enter "breeding" in the *Search Term* field and click *OK*.
- 16) Now click on the **Perform Search Button**.
- 17) Fernie will be displayed. This is because she was the only animal you purchased in 2005 for breeding (Remember, we entered a note of "Bought for breeding stock." in the note when we filled in her record. You could use a similar technique to search for animals that have been treated for a particular illness, or with a specific vaccine. If you enter a vaccine's serial number when you record treatment events you could search for animals that received shots from that exact bottle if you want.

Recording Actions on your Animals

As fun as looking at your animals is, it's time to start recording actions against them; after all, that's where you spend the greatest amount of your time anyway. Ranch Manager is designed to work similar to the way you work. As you noticed earlier, creating animals is a process similar to the way they come onto your operation, where you will work with them, and eventually they will leave the operation. The lifecycle of your animals is managed through recording actions against them.

Most of the actions are fairly self-explanatory, and from any of the views within the **Equine Herd** module can be found by accessing the **Actions** spring control located on the **Toolbar**.

Animal Actions



One of the very useful aspects about actions is that they can be applied to multiple animals at one time. This is a great time saver.

- 1) Go to the **Herd Mares** view.

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- 2) When we were last at the **Herd Mares** view we were working in the **Browse** sub-view. Click on the **List** tab at the bottom to return to the list view.
- 3) Let's select all the animals in the list. To do this, start by clicking (just once) on one of the animals (e.g. Fernie).
- 4) Next press the "Ctrl" key down and press the letter 'a' (then release both keys). All animal in the list will be selected.
- 5) If we used an action now, it would duplicate it across all animals. If you place your mouse over the **Actions** button you will notice that the **Foal Animal** action is disabled; this is because you cannot apply that action to multiple animals at the same time (otherwise they could all have the same Foal, which doesn't seem possible). There are various reasons why actions will become disabled. Another reason, is that an action requires a selection, so when no animals are selected, many of the actions will be disabled.
- 6) We can also use the keyboard in conjunction with the mouse to more finely control the selection of animals. Click once on Fernie, this will change the selection to just have Fernie selected.
- 7) Now press and hold the "Ctrl" key down and then click on Fame. This will add Fame to the selection.
- 8) Let's assume that we did this by accident and did not really want to add Fame to the selection. To unselect Fame, simply hold the "Ctrl" key down and click on Fame again.
- 9) You should now have Fernie selected. Let's do one more selection trick. Click on Fernie, to reset the selection to just include Fernie.
- 10) Now press and hold the "Shift" key down and click on Fame. This will select all animals from the starting selection (Fernie) through the ending animal in the selection (Fame). You could then use the "Ctrl" plus mouse combination to further refine the selection.

Now that we have all the animals selected. Let's apply an action.

- 1) Access the **Actions** control and click on **Treat Animal** (the items in the **Action** control are sorted in alphabetical order). The **Enter Treatment Data** window will appear.
- 2) Enter the following data:
 - a. *Treatment Date* = "1-Jan" of the current year.
 - b. *Treat For* = "Some Disease"
 - c. *Treat With* = "Vaccine"
 - d. *Treatment Cost* = "1.25"
- 3) Then click on "OK".
- 4) This action will be applied to both animals selected. You will see a little needle symbol appear by the animals in the *Notes* column, which simply indicates that the animals have been treated in the current year.

Let's assume that we had Fame selected by accident, and we really just wanted to apply the action to Fernie. Correcting this mistake will allow us to see where the event data is stored, and how we can make changes after they have been applied. Note: If I had made an error in the event data that I wanted to reverse for all animals, I would use the *Undo* button from the toolbar.

- 1) Double click on Fame, to bring her up in the **Animal Editor** view.
- 2) Click on the **Event History** tab located at the top of the editor view.
- 3) Click on the "Treat – Some Disease" event from the list on the panel on the left.

- 4) You will notice the panel on the right will populate with the treatment information. Since we are here, let's first make a change the entry, before we delete it (just to demonstrate how it is done).
- 5) Change the date from "1-Jan" this year to "2-Jan" of this year.
- 6) Since events are attachments to the animal record, all we need to do is re-attach it to the record when we make a change. To do that, click on the **Attach Event** button (looks like a little paperclip) which is located in the top-right corner of the event editor panel. You should notice that the date has changed in the list panel on the left. Go ahead and save the animal now by clicking on the **Save Animal** action located in the bottom right corner.
- 7) To delete the event from the animal, select it from the panel on the left.
- 8) Now click on the **Delete Event** action which is located in the top-right corner of the event editor panel (it's the little red 'x', not the one in the bottom-right though). This will remove the event from the list.
- 9) Save the animal.
- 10) Instead of going back to the **Herd Mares** view using the **Select View** control on the toolbar, try using the **Go Back** button located in the bottom right corner of the **Animal Editor** (It's the little left facing green arrow). Click on this button and it will take you back to the last view you were in before arriving at the editor with the currently viewed animal.

Breeding Your Animals

There are three ways to breed your animals.

- Use the **AI/Breed Animal** action to record the specific date and sire that bred the female.
- Use the **Embryo Transplant** action to record the specific date, sire, and dam with respect to an embryo inserted in to a female.
- Finally, you can simply place an open Mare and a Stallion in the same location so they can breed naturally.

Ranch Manager also comes with the capabilities to assist you with breeding decisions. Throughout this part of the tutorial, we are going to explore a few new concepts. The first is managing someone else's animals, which we will be hosting on our operation for breeding; the second will be using the breeding planner. Finally we will actually do some breeding.

Let's start by creating a Stallion that is owned by another breeder.

- 1) Use the **Actions** control and select **Create New Animal**. Even though we are on the **Herd Mares** view we can use this action to create any type of animal.
- 2) In the editor view, fill in the following data values:
 - a. *Display Name* = Russell T6
 - b. *Gender* = Stallion
 - c. *Breed* = Quarter Horse
 - d. Uncheck the *Raised* check box.
 - e. Change the *Owner* panel to read "Todd Neebur"
- 3) Save the animal, and Quick Add Todd Neebur.

Since we are going to bring Russell onto our operation, we need to tell Ranch Manager that we manage animals for Todd Neebur from time to time.

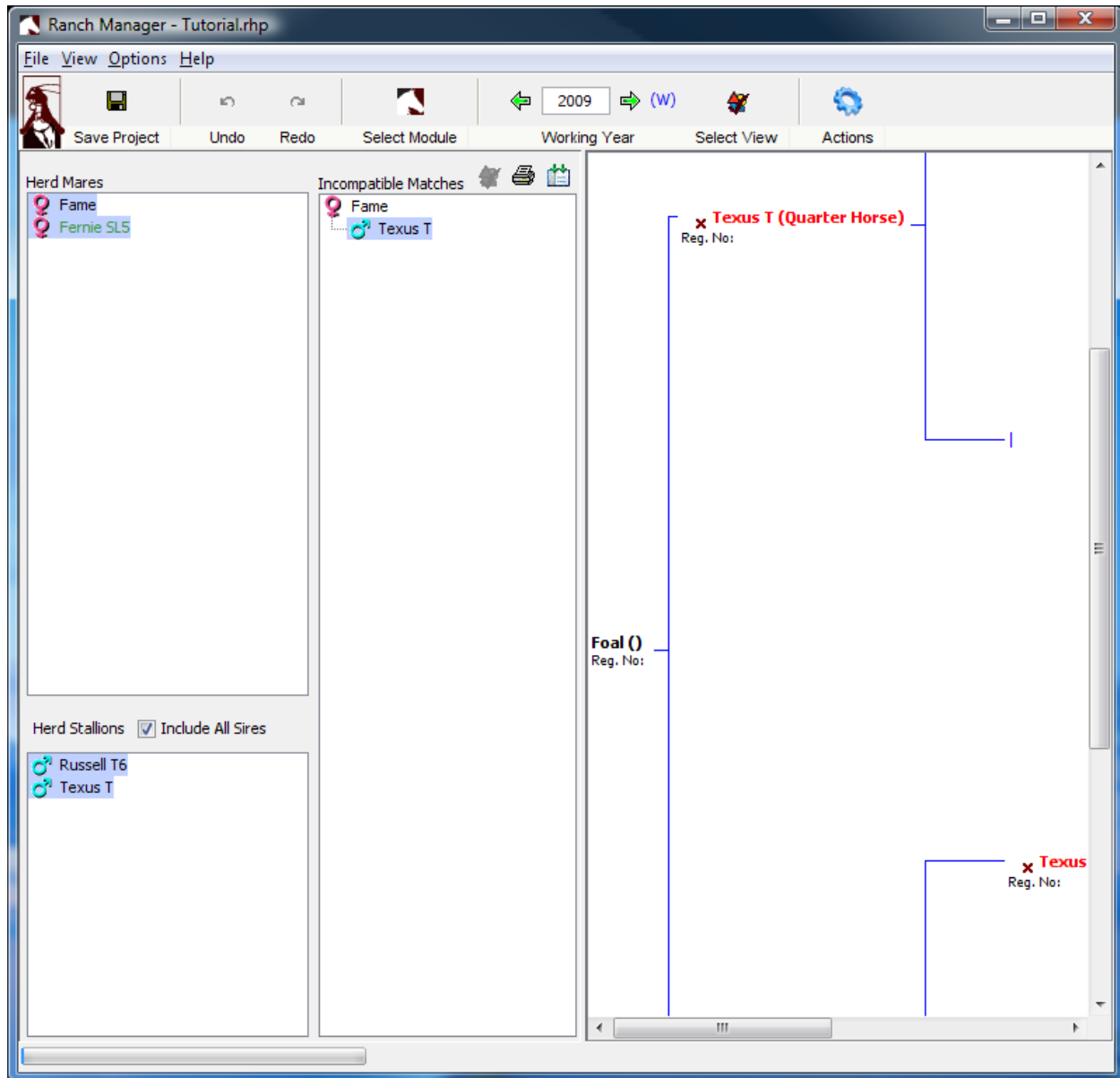
- 1) From the **Select Module** control, click on **Owners & Contacts**.
- 2) If Todd Neebur is not already selected from the list on the left, click on him to select him.
- 3) The panel on the right is the **Owner & Contact Editor** view. You will find a check box labeled *Managed*. Check this box to indicate that you manage animals for Todd Neebur.
- 4) Save Todd's record by using the **Save Owner** action in the bottom right corner.
- 5) Now to verify that Russell is now in your herd, use the **Select Module** control and select **Equine Herd**.
- 6) Go to the **Herd Stallions** view using the **Select View** control. You should see Russell in your herd. The owner column for Russell T6 will read "TN" which is Todd's initials.

Let's take a look at the breeding planner now.

- 1) Use the **Select View** control and click on the **Breeding Planner** view.
- 2) There are two lists on the left, one labeled *Herd Mares* and the other *Males*. There is also a check box above the *Herd Stallions* list labeled *Include All Sires*. Click on this box to show all the potential sires.
- 3) Use the mouse, click on Fernie in the *Herd Mares* list, and then with the "Ctrl" key held down, click on Fame. You should have all the Herd Mares selected now.

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- 4) Use the mouse and select both Stallions from the *Herd Stallions* list.
- 5) Click on the **Check Breeding Plan** action. This button is located in the top right corner of the *Incompatible Matches* panel.
- 6) You will now see Fame listed in the *Incompatible Matches* panel with Texus T listed, indented underneath. Click on Texus T.



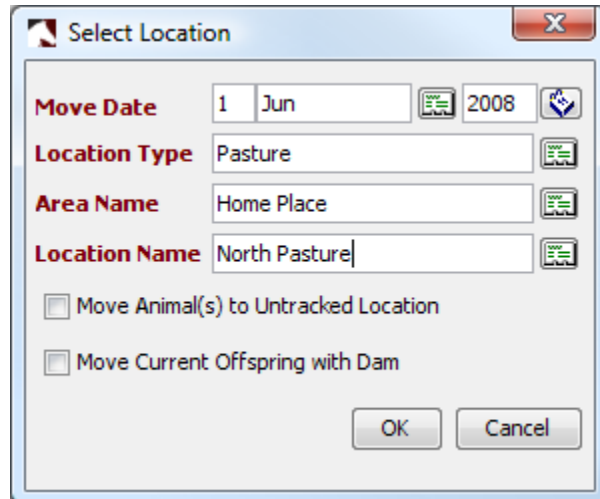
- 7) By clicking on Texus T, the Pedigree view will populate to the right, showing the inbreeding details for a Foal resulting from breeding Texus T and Fame.
- 8) We are planning to breed Fame with Russell though. Let's take a look at what the resulting Foal will look like. Click on Fame from the *Herd Mares* list, then click on *Russell* from the *Herd Stallions* list.

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- 9) Click on the **Quick Check Sire & Dam** action which is located directly to the left of the Printer button above the *Incompatible Matches* panel.
- 10) The pedigree panel will now populate with the Foal that would result by breeding these two.

After using the **Breeding Planner** we decide to go ahead and breed Fame with Russell.

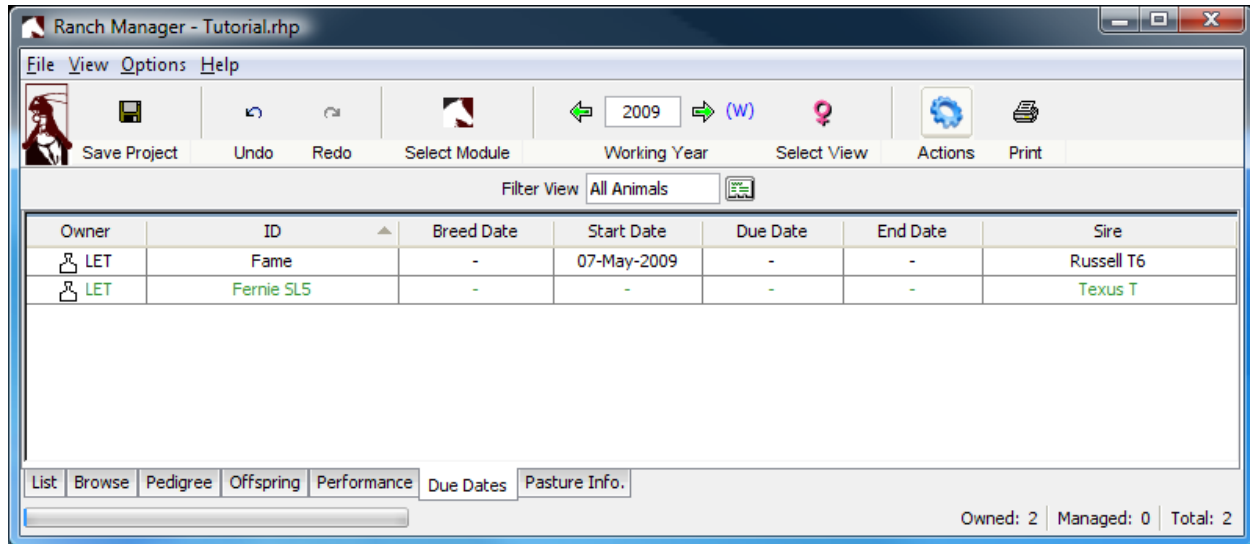
- 1) Let's start with a natural breeding, by simply placing the two animals together, starting with Russell. From the **Select View** control select **Herd Stallions**.
- 2) Click on Russell to select him.
- 3) From the **Actions** control select **Move Animal**.
- 4) In the **Select Location** window, provide the following data:
 - a. *Move Date* = 1-Jun of last year
 - b. *Location Type* = Pasture
 - c. *Area Name* = Home Place
 - d. *Location Name* = North Pasture



- 5) You should have filled out the window as shown above. When done, click "OK". You will be asked to "Quick Add" the area called "Home Place". Go ahead and click on "Yes" to confirm. This will create a new Area called the Home Place, with a pasture called "North Pasture".
- 6) Let's move Fame now. Click on the **Herd Mares** view from the **Select View** control.
- 7) Select Fame, and use the **Move Animal** action to bring up the **Select Location** window.
- 8) Provide the following data:
 - a. *Move Date* = 1-Jun of last year.
 - b. *Location Type* = Pasture
 - c. *Area Name* = Home Place
 - d. *Location Name* = North Pasture
- 9) When finished, click "OK".

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Russell and Fame are now in the same location, and therefore Fame is considered to be exposed to Russell. If you click on the **Due Dates** sub-view located at the bottom of the **Herd Mares** you should see something like the following:



Note how the *Start Date* column is filled with “07-May”, this year, for Fame. This is because based, on the date that Fame and Russell were combined; the earliest date for Foals would be around the 7th of May.

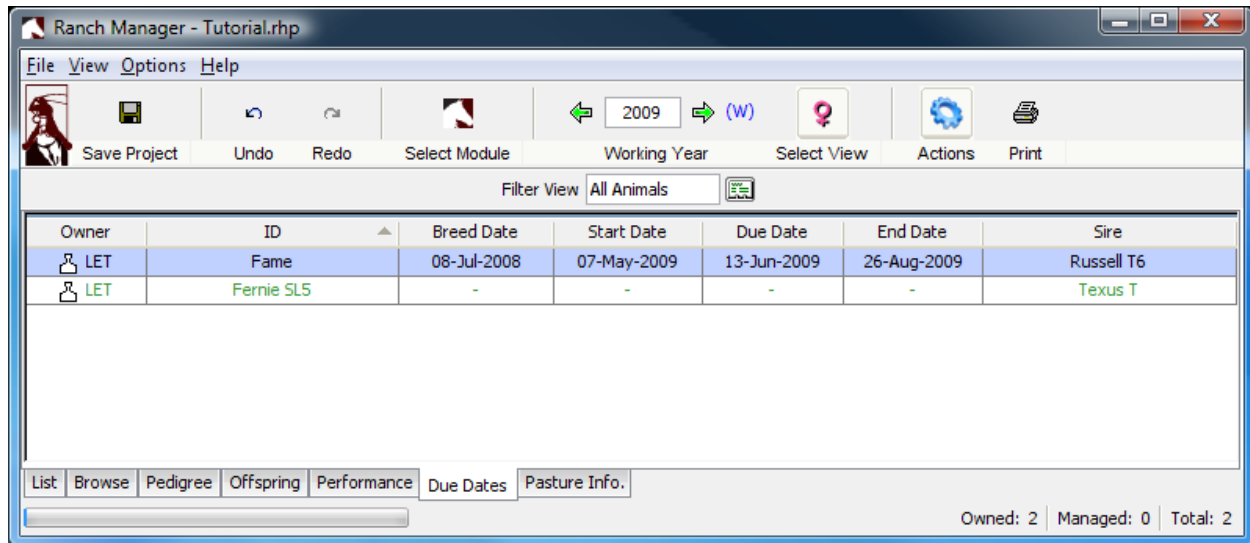
Now let’s assume we note the date that the two actually bred:

- 1) Select Fame from the **Due Dates** sub-view.
- 2) Go to the **Actions** control and select **AI/Breed Animal**. Fill in the following data in the **Breed Animal** window.
 - a. *Breed Animal* = “8-Jul” of last year.
 - b. *Sire* = “Russell”
- 3) When done, click “OK”.
- 4) You will now notice that the actual *Due Date* column is filled in with “13-Jun” which is calculated based on the breeding date we just provided.

The final step is to separate the two animals.

- 1) Select Fame again, and from the **Actions** control select **Move Animal**.
- 2) Provide a date of “20-Sep” of last year, and then check the box labeled *Move Animal(s) to Untracked Location*.
- 3) This will disable the remaining fields. By using this check box, you are simply indicating that you have moved the animal out of that location, but have not specified where the animal was moved to. Click “OK”. You should now see the following:

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- 4) Note that the *End Date* value is now provided for Fame (for obvious reasons). In theory, we could leave Fame right there, and just remove Russell, since it only requires us to move one away to separate them (I only say this because most will probably pull the Stallion before actually moving the Mares). This is done so we can see the result of separating them reflected in the **Due Date** sub-view before we move on.
- 5) Let's move Russell out too, go to the **Herd Stallions** view. Click on Russell, and again use the **Move Animal** action to move Russell to an untracked location on September 20, last year.
- 6) We also want to indicate that Russell is no longer on our operation as we sent him back to Todd's. Double click on Russell.
- 7) In order to move Russell from our control, we simply need to mark him as *Not Managed*. Since we have indicated that we manage animals from Todd Neebur from time to time, any animal that belongs to Todd needs to be marked as *Not Managed* if you do not want it to appear in your herd. Mark Russell as such, by clicking on the *Not Managed* check box located at the bottom of the *Characteristics* panel in the **Animal Editor** view.
- 8) Save Russell using the **Save Animal** action in the bottom right corner.
- 9) Go to the **Herd Stallions** view, and you will note that Russell is no longer listed. You can always bring him back by simply un-checking the *Not Managed* check box in his record. You will find him listed in the **Unmanaged Animals** view now.

Recording Animal Feed

There are two ways to feed animals. The first is to simply use the **Feed Animal** action and handle feedings that are applied to individual animals only. The second is to apply feed to a location where all animals present can consume it, which is probably a little more common with Equine.

Let's start with the individual feeding.

- 1) Go to the **Herd Mares** view and select Fame.
- 2) Click on the **Feed Animal** action found under the **Actions** control.
- 3) Fill in the **Feeding Schedule** window with the following data:
 - a. *Start Date* = "1-Aug", last year
 - b. *End Date* = "20-Sep", last year
 - c. *Apply Every* = "1"
 - d. *Type* = "Oats"
 - e. *Quantity* = "1.0"
 - f. *Units* = "Gallons"
 - g. *Cost/Unit* = "0.50"
- 4) The feeding schedule allows you to enter repeat feedings. Since Fame gets a gallon of oats every day, we can set that up. If we estimate that each gallon of oats costs \$0.50 then we can also calculate the feed costs for Fame. By clicking on "OK" you will be feeding 1 gallon of oats to Fame every day starting on the 1st of August, and ending on the 20th of September, last year. Click "OK" now.

Let's use the second method now, to apply feed to a location before we take a look at where this data is recorded.

- 1) From the **Select Module** control select **Locations**.
- 2) You will be taken to the **Area Summary** view, which is the default view for the **Locations** module. Go to the **Select View** control, and select the **Location Summary** view. The Home-Place/North Pasture location will be displayed (since that is all we have created so far).
- 5) To apply feed to the animals in that location, click on the Home Place/General location, and use the **Actions** control and select **Create Feed Application Schedule**. Fill in the **Feeding Schedule** window with the following data:
 - a. *Start Date* = "1-Jun" last year
 - b. *End Date* = "20-Sep" last year
 - c. *Apply Every* = "7"
 - d. *Type* = "Supplement"
 - e. *Quantity* = "2"
 - f. *Units* = "Blocks"
 - g. *Cost/Unit* = "5.00"
- 6) Basically, by providing the data above we are indicating that we are putting out 2 supplement blocks, costing \$5.00 a piece once per week to the Home Place/North Pasture location for the period indicated. Click "OK".

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- 7) Let's take a look at where this data ends up (just in case you make a mistake, and you want to fix it later). Click on the **Area Summary** view from the **Select View** control.
- 8) Double click on the Home Place area to bring it up in the **Area Editor** view.
- 9) Click on the **Pastures** tab located across the top of the editor view.
- 10) Select the "North Pasture" location from the list of pastures on the left.
- 11) Since Pastures are attachments for an Area, you will note the General pasture shows up in the attachment editor on the right. This editor also has tabs, click on the **Feed History** sub-view. You should see the following:

The screenshot shows the Ranch Manager - Tutorial.rhp application window. The main menu includes File, View, Options, and Help. The toolbar contains icons for Save Project, Undo, Redo, Select Module, Working Year (set to 2009), Select View, and Actions. The main window is divided into several sections. On the left, there is a list of pastures with "North Pasture" selected. The right side of the window is titled "Pastures" and contains a sub-view titled "Feed History". The "Feed History" sub-view has tabs for Main, Resident Summary, and Feed History. The "Feed History" tab is active, showing a table of feeding events. The table has columns for Date, Type, Quantity, Units, Cost/Unit, and Total Cost. The data shows a series of "Supplement" events, each with a quantity of 2 blocks and a cost of \$5.00 per unit, totaling \$10.00. The dates range from 14-Sep-2008 to 13-Jul-2008. Below the table, there is a section for "Feeding Notes" and a "Home Place" button at the bottom.

| Date | Type | Quantity | Units | Cost/Unit | Total Cost |
|-------------|------------|----------|--------|-----------|------------|
| 14-Sep-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 07-Sep-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 31-Aug-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 24-Aug-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 17-Aug-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 10-Aug-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 03-Aug-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 27-Jul-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 20-Jul-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |
| 13-Jul-2008 | Supplement | 2 | Blocks | \$5.00 | \$10.00 |

- 12) You can add and remove entries from the table listed here using this interface. Let's assume that we did not put a block out the first week of August. Click on the row dated corresponding to that date.
- 13) At the top of the **Feed History** panel you will find the **Delete Feed Event** button (looks like a red 'x'). Click on it, to remove the event for that date.
- 14) Save the area using the **Save Area** action located in the bottom-right corner.

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Now let's take a look at the individual animals.

- 1) From the **Select Module** control select **Equine Herd**.
- 2) Go to the **Herd Mares** view, and double click on Fame to bring her up in the editor.
- 3) Click on the **Feed History** action tab located at the top of the panel. The panel will not list any data.
- 4) This is because it is currently filtering data for the current year. Change the **Start Date** to the 1st of January for last year, and hit the refresh button to the right (looks like to curved, green arrows chasing one another). You should see the following:

| Date | Type | Quantity | Units | Total Cost | Location |
|----------|------------|----------|---------|------------|--------------------------|
| Sep-2008 | Oats | 20 | Gallons | \$10.00 | N/A |
| Sep-2008 | Supplement | 2 | Blocks | \$10.00 | Home Place/North Pasture |
| Aug-2008 | Oats | 31 | Gallons | \$15.50 | N/A |
| Aug-2008 | Supplement | 4 | Blocks | \$20.00 | Home Place/North Pasture |
| Jul-2008 | Supplement | 4 | Blocks | \$20.00 | Home Place/North Pasture |
| Jun-2008 | Supplement | 5 | Blocks | \$25.00 | Home Place/North Pasture |

Total Feed Costs for Period: \$100.50

Fame

- 5) There are two tabs to this view. The default is the **Summary** tab, which provides a monthly overview of the feed applied to the animal. You can also narrow this view by changing the **Start Date** and **End Date** filter values. The **Total Feed Costs for Period** is listed at the bottom of the view. Here we can see that in September, Fame was fed 20 lbs of Oats, which totaled \$10.00. Fame was also provided access to supplement blocks, of which she has consumed 2 blocks (4 were applied, but 2 were consumed by Russell) which cost \$10.00 (\$5 per block). The total feed costs for the period total \$100.50. You can click on the **Details** tab to view each individual feed application for Fame.

The final thing to note is that you can delete feeding events from an animal, but you can only delete the ones that were applied directly to the animal. You cannot delete ones that were applied by a location (you need to do that through the **Locations** module).

Keeping Your Books

This is the final section of the tutorial. If you do not plan to use Ranch Manager for financial record keeping, then feel free to skip this section.

Recording income and expenses is pretty straight forward with Ranch Manager. There are a few terms and concepts that may not be totally obvious however.

Let's start with expenses.

- 1) From the **Select Module** control select **Income/Expenses**. This will leave you in the **Expenses** view which is the default. You will see the expense icon showing up above the **Select View** control.
- 2) Since we will be entering data for last year, change the year on the toolbar to the previous year.
- 3) To create a new expense entry, use the **Actions** control and select **Create New Expense Entry**. The **New Entry** window will be displayed. Fill it in with the following data:
 - a. *Date* = "8-Jan" last year
 - b. *Amount* = "91.00"
 - c. *Account* = "Feed"
 - d. *Paid To* = "Feed Supply"
 - e. *Invoice #* = 3483
 - f. *Date Paid* = "1-Feb" last year
 - g. *Pmt Type* = "Check"
 - h. *Num* = "4483"
 - i. *Memo* = "180 pounds of oats".
- 4) The date entered is the date that you were actually billed (basically the invoice date). The amount field is pretty obvious, but the *Account* field needs a little explanation. The *Account* field represents the actual accounting account that will be used to record the expense. Think of it as being equivalent to a category for these types of expenses. The *Date Paid* field holds the date that you actually paid the invoice. In most cases the *Date* and *Date Paid* values will be the same. Click "OK" to create the entry.
- 5) You will be asked to Quick Add "Feed Supply", click "Yes".
- 6) You will be asked to Quick Add "Feed", and again, click "Yes".
- 7) Because the transactions took place last year, you need to backup the year on the toolbar to have the transaction displayed.
- 8) Let's enter another one. Click on **Create New Expense** from the **Actions** control.
- 9) Provide the following data:
 - a. *Date* = "11-Jun" last year.
 - b. *Amount* = "175.00"
 - c. *Account* = "Breeding Stock Rental"
 - d. *Paid To* = "Todd Neebur"
 - e. *Invoice #* = 85
 - f. *Date Paid* = "20-Sep" last year
 - g. *Pmt Type* = "Check"
 - h. *Num* = "4491"

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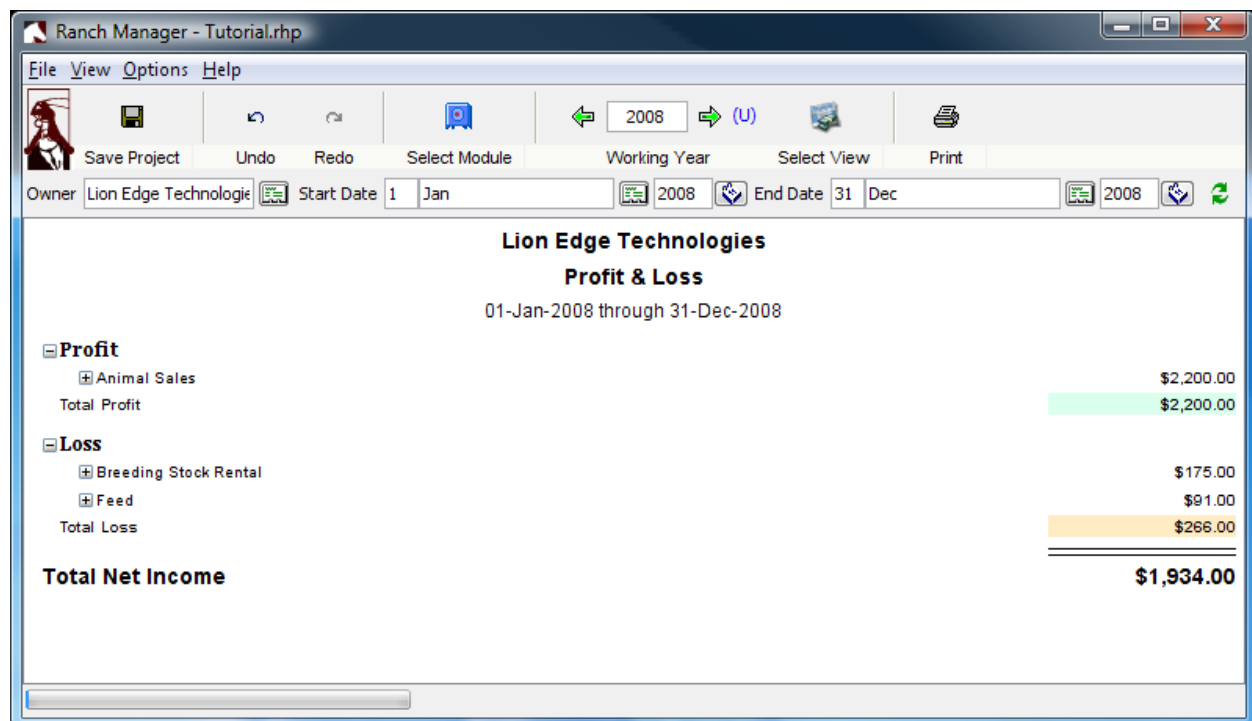
- i. Memo* = "Rented Russell to breed Fame".
- 10) Click "OK", and you will be asked to Quick Add "Breeding Stock Rental"; click "Yes".

Let's add some income now.

- 1) Use the **Select View** control to navigate to the **Income** view.
- 2) To create a new income entry, use the **Actions** control and select **Create New Income Entry**. The **New Entry** window will be displayed. Fill it in with the following data:
 - a. *Date* = "4-Jun" last year
 - b. *Amount* = "2200"
 - c. *Account* = "Animal Sales"
 - d. *Received From* = "Bob Breeder"
 - e. *Invoice #* = 3483
 - f. *Date Paid* = "4-Jun" last year
 - g. *Pmt Type* = "Check"
 - h. *Num* = "928"
 - i. *Memo* = "Sold Rookie."
- 3) An income entry is practically identical to an expense entry. The only real difference is that you have a *Received From* field instead of *Paid To*, simply because you are receiving money rather than giving it away. Click "OK".

There's not much more to it than that. The last view we will look at is the **Profit & Loss** view.

- 1) Use the **Select View** control to navigate to the **Profit & Loss** view. You should see the following:



- 2) If you do not see any data (e.g.: all zeros), it's probably because you are not viewing last year. Use the toolbar to change the **Working Year** to last year. This view provides a summary of all income and expense by account, rather than in chronological order (as is viewed in the other views). This view also gives you totals by account, which is useful for tax preparation. You can use the "+" and "-" symbols to expand the report to look at individual transactions under accounts, or to close parts of the report back up. When you print the report it will print in fully expanded mode, so you do not have to worry about having it expanded before printing.
- 3) The last piece to observe is the filter at the top of the panel (just below the **Toolbar**). You can adjust the dates in this area to narrow the view, or adjust for different year ends. Further, you can change the "Owner" value if you track income and expense for different owners. You can only select owners from the list that have been marked as "Managed".

Thanks for going through the tutorial. You should now have a pretty good feeling for how to use the software. The remaining sections in this guide will serve as more of reference material. Each of the modules is covered below, where each of the screens and actions are covered. To return to the project you created when you installed the software click on the **File** menu and select **Open**. You will find your project listed in the **Open Project** window, select it and click "Finish" to get back to work on your own data.

What's Next?

Congratulations! You should be adequately fairly familiar with Ranch Manager now. If you need further information about Ranch Manager, please let us know! You can either give us a call, or send us an email. We are here to help.

Thanks!

E-mail: support@lionedge.com

Phone: 720-870-5086

Additional Resources

Your success with Ranch Manager is important to us. If you can't find some of the information you need, here in this manual, there are a few more ways that you can get your answers.

- Check out our Web Site www.lionedge.com and navigate to the ***Frequently Asked Questions*** section under ***Support***. Here you may find that someone else has already asked the same question, and the answer will be posted
- Send us an email. You can write us using the email address: support@lionedge.com
- Finally give us a call; we will be happy to answer your question. You can call our support center with the following number: (720) 870-5086