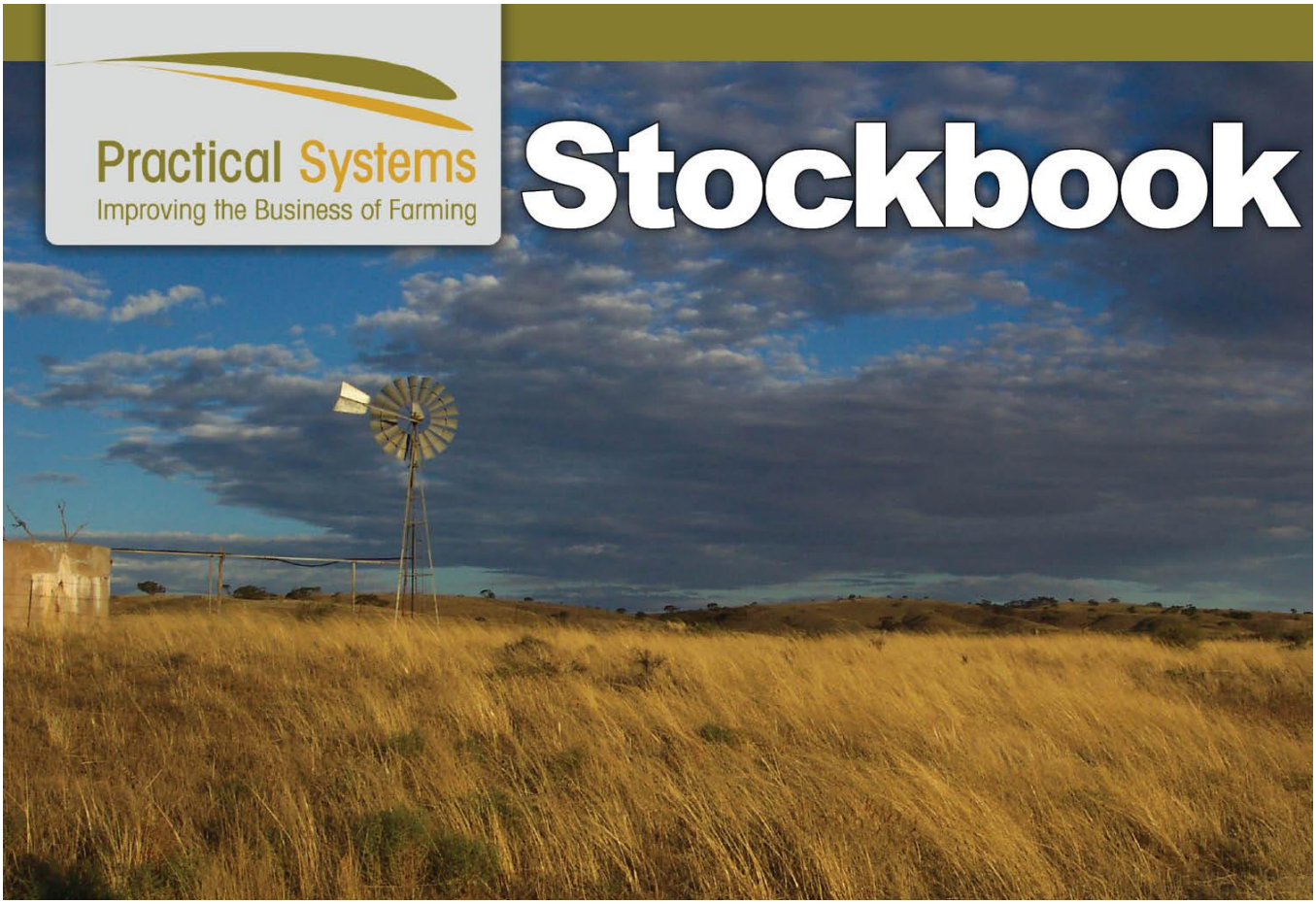
Practical Systems
Improving the Business of Farming

STOCKBOOK
QUICK START GUIDE



Livestock Management Software for Farmers to Work Smarter

Stockbook

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For more detailed instructions, please refer to the Stockbook Manual within the program under Help > Manual.

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Stockbook Quick Start Guide

The hardest part about using new software is getting started. This Quick Start Guide offers the quick way to begin using and understanding Practical Systems' Stockbook.

Quick Start Guide Icons

📖 Learn a bit

💻 Do a bit

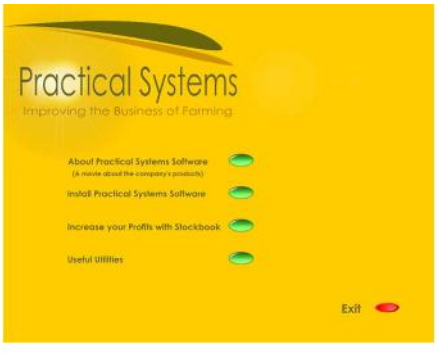
☝ Important information

1 How to Install Stockbook

There are two ways to install our programs:

1. Practical Systems website www.practicalsystems.com.au
   Go to **Customers > Login** and log in using your client ID and password.
   Install the full program or update your existing program through our website.

2. Install from the installation disk.
   ⦿ Insert the Installation CD into your CD drive.
   The CD will run automatically and open the Installation Screen.



🖱 Use your mouse to select the program you wish to install and follow the onscreen prompts.

1.2 The opening screen for Demonstration Herd

From this screen select your main livestock type, type of operation and herd/flock size and click OK. Stockbook will now recommend which level of the program best suits your operation and allows you to view and use that particular level of Stockbook. Eg if you select the setting below you will have access to the Stockbook Stud unlimited herd size with report writer and embryo transfer whilst you are in the demonstration herd or trial period.

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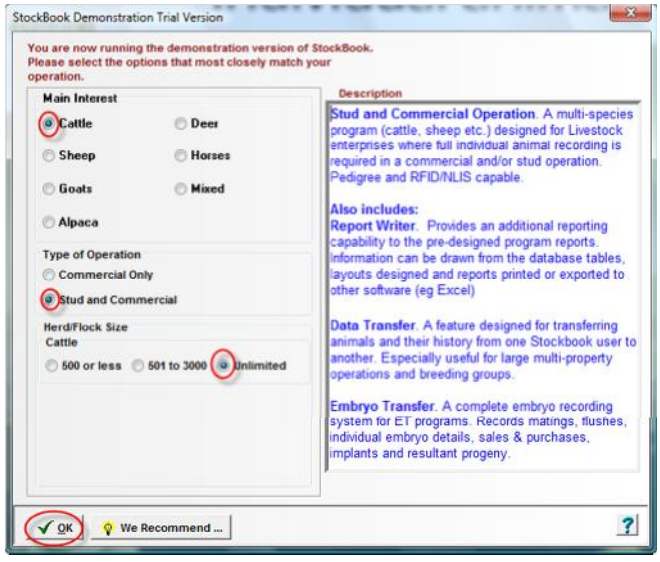

1.3 Registration

To register your purchased copy of Stockbook after installation, please phone Practical Systems on 1800 624 688 for your unique unlock code.

❖

2 Finding help when you need it

Help and Electronic Documents

📖 By going to the **Help menu** you will find a comprehensive set of resources to assist you including a full **Stockbook manual** and a search function for quick access to help on a particular subject.

💻 Go to **Help > Manual**.
Additional instructions can be found by going to
Help > Program Documentation.

2.1 On Screen Help

📖 To summon help from within a particular area of the program relevant to the screen you are on:

💻 Press the **F1 key** or click the **button** at the bottom right of the screen.

2.2 Demonstration Data

📖 The **demonstration data** in Stockbook has been created so that you can start viewing, editing or manipulating information straight away. This allows you to make entries of your own, amend and delete items - all to help you explore and understand the features of Stockbook.

💻 Go to **File > Demonstration Herd.**

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2.3 Practical Systems Software Support Desk.

📖 Keeping your Annual Subscription up to date will ensure:

- **Your software is always current.** Your Annual Subscription entitles you to **program updates** and **upgrades.**
- **Help is always at hand.** Annual Subscription provides you with **telephone support** during business hours (8.30am to 5.30pm Monday to Friday AEST) to help you through any queries or problems you may have. Use of this service is unlimited for your period of cover.

  Phone: 1800 624 688
- You are provided with **regular Practical Tip emails** in the form of a step by step guide that will help you keep getting the most from your software and **newsletters.**

❖

3 Getting Started

☝ **As mentioned previously, the hardest part about using new software is getting started.**

The two basic steps to get started are:

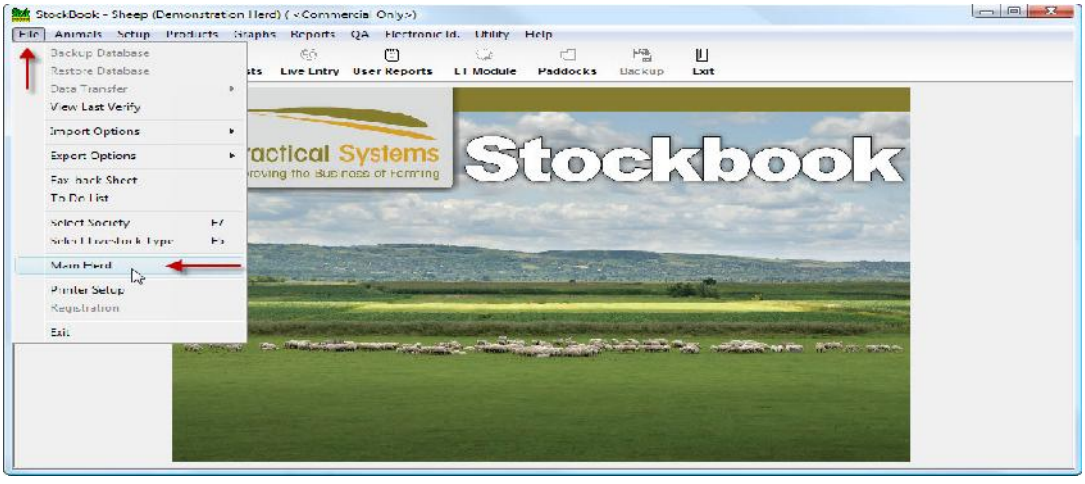
- Step 1. Enter setup information via the Setup Menu or Setup Wizard;
- Step 2. Enter your animals.

Don't forget to use the demonstration herd to assist you to view and/or practice using the program.

☝ **The following illustrates how to setup a commercial operation. If you have purchased the Stud edition you will also be required to complete the Part 5 "additional setup for Stud users" in this quick start guide.**
Setup is strongly recommended before adding your animals.

Before we proceed please make sure you are in the main herd. If you are not, please go to

💻 **File > Main herd.**



As Stockbook is a multi species program, select the livestock type you wish to set up first by going to:

💻 **File > Select livestock type** or press **F5** on your keyboard.

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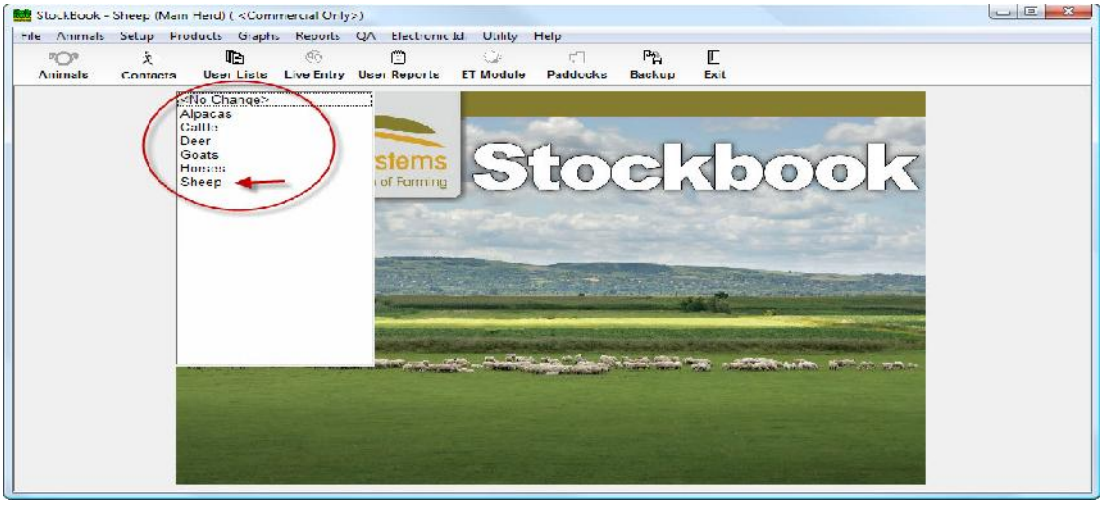
Select a livestock type from the list and your main screen of Stockbook will now change to reflect the livestock type you have selected.



If you are already in the correct livestock type, click on <No Change>

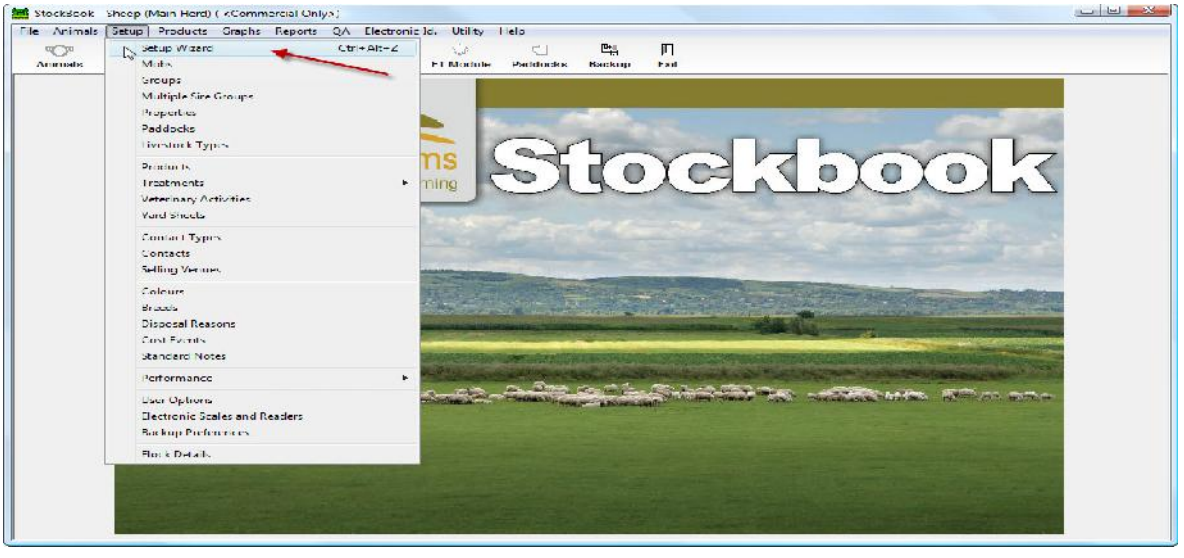
3.1 Options for Initial Stockbook Setup

There are two methods to choose from for the initial Stockbook setup -

Option One – Use the Setup Wizard

The set up wizard offers a quick way of getting started. You will complete 5 simple (optional) screens which allows you to setup basic information such as properties, paddocks, mobs and groups prior to adding your animals. Please use this quick start guide to assist you or the full manual for more detailed set up information.

Go to **Setup > Setup Wizard** or use **Ctrl+Alt+Z** on your keyboard.



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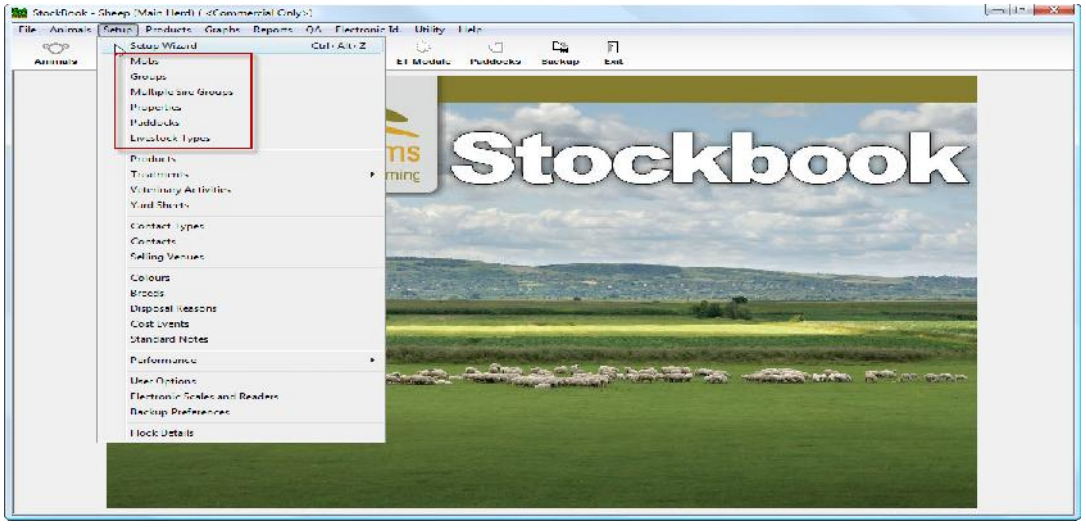
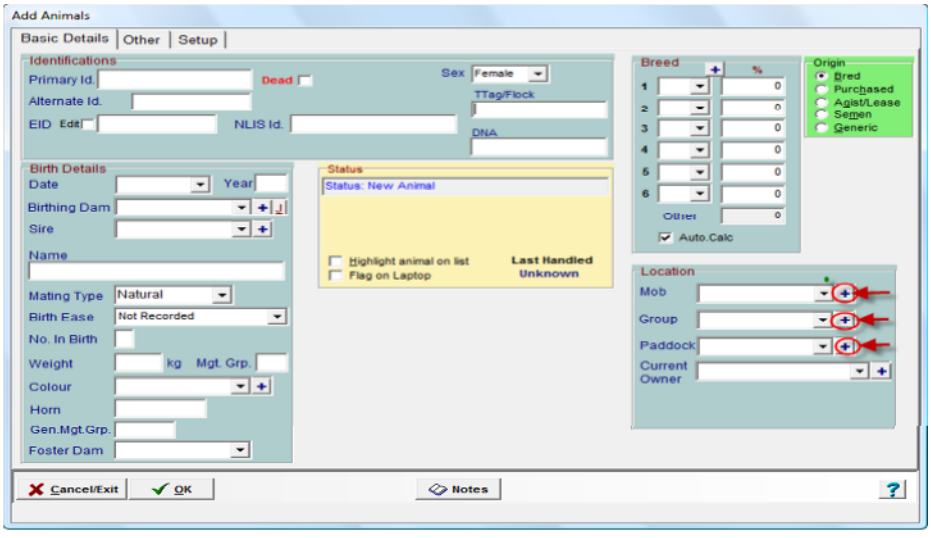
Please follow the prompts using this Quick Start Guide to assist you. Once you have entered your basic setup you can use the setup menus to add, edit or delete setup information.

Option Two - Entering setup information using the setup menus

Mobs, groups, properties, paddocks, treatment and products etc can be entered into a drop-down list to save time typing and to speed up data entry.



You can also add to the setup lists through the use of the + plus button which can be found throughout the data entry screens as you use the program (add on-the-fly).



If the selection that you require is not in your dropdown list, click on the + (plus button) and enter the required information, this will now be added to your dropdown list.(add on-the-fly)

We suggest that you set-up most of the initial information from the menu items. This will speed-up the adding of animals in the first instance. Additions to the list can then be added on-the-fly as new items are required.

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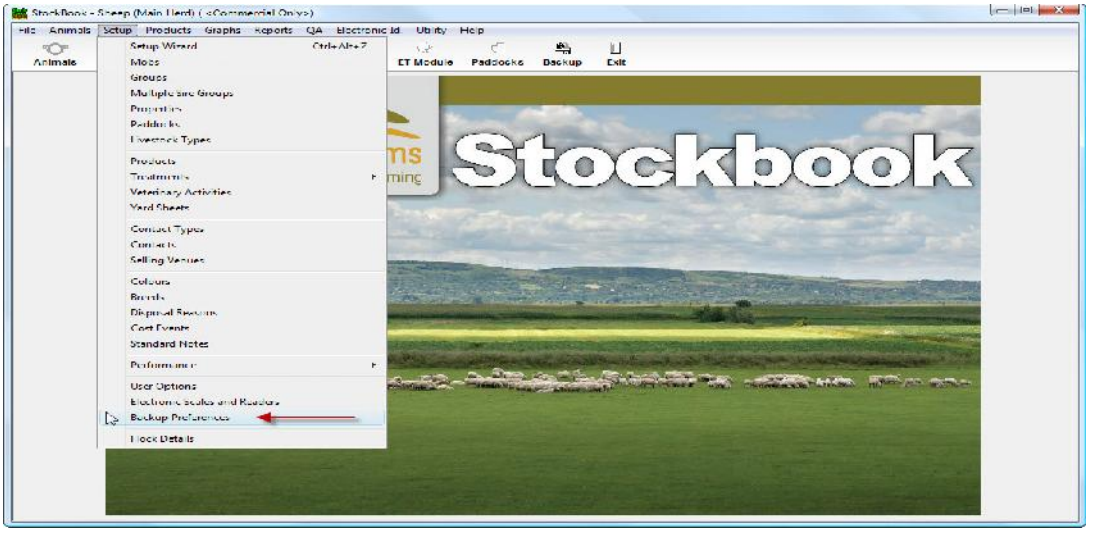
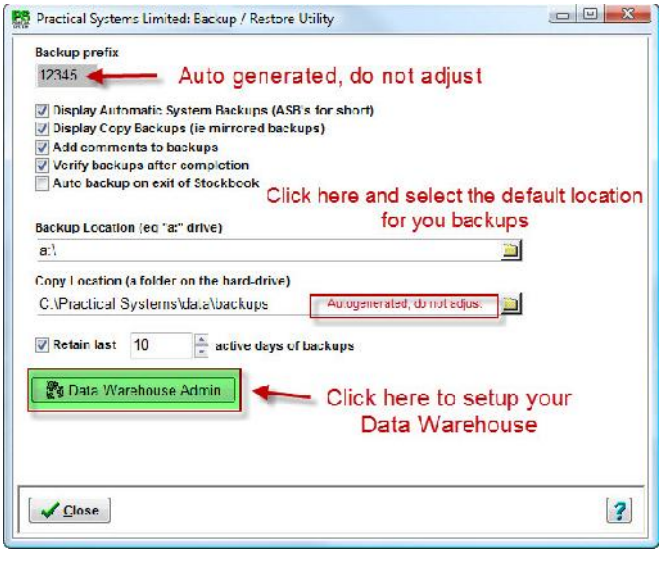
3.2 Setup Backup Preferences

Before we start working our way through the suggested setup lists it is important to first setup your backup preferences.

Backing up is fundamental to managing your Stockbook data.

Go to **Setup > Backup Preferences.**





Select your preferences by ticking or unticking the series of tick boxes.
Click on the yellow folder (browse) in the backup location and select a location for your backups.

Note: *If you would like it to default to a memory stick please insert the memory stick into your computer and you will be able to set this location for all your backups.*

Backing up is vital and cannot be over-emphasized please see section 3.5 for how to backup.
Relevant

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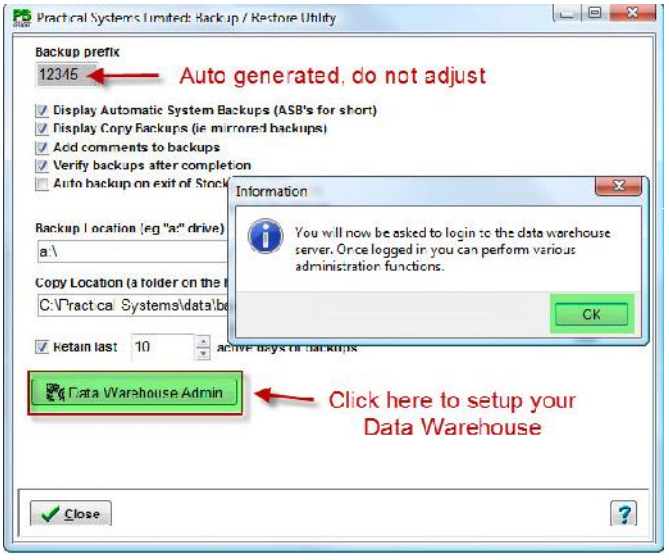
3.2.1 Data Warehouse Setup

Backing up your data is the most important part of using Practical Systems software. It is also important to have a Backup that is external to your computer and possibly even in another location away from your office or home, in case of any unforseen event.

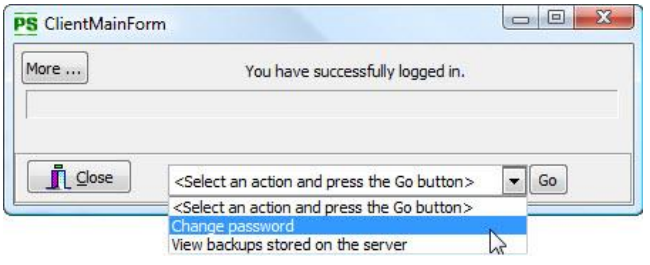
The Practical Systems Data Warehouse is a secure, off-site data storage service, located on the Practical Systems server at our office.

- Click on **Data Warehouse Admin.**



- the **first time you login**, your **password** will be **YOUR CLIENT ID**, You will then be prompted to change your password

- You can change your password at any time by logging in via **Data Warehouse Admin** and selecting **Change Password** from the drop down list



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3.3 The Setup Menus

The following outlines suggested lists to setup prior to adding your animals.

Each setup list follows the same basic rules and allows you to do the following:

Add a new item:

Go to **Setup** and select desired list (e.g. Setup > Mobs).
Click on **Add.**
Enter a (unique) **code** (if code required) and **description.**
Click on **OK** to accept the data and prepare for another entry, or click on **Cancel/Exit** to close the screen without any changes to the database.

Edit an item:

Go to **Setup** and select desired list.
Highlight the item to be edited and click on **Edit** or double click on the item.
Modify details as required, or make inactive (for items you no longer want to appear in the list).

Delete an item:

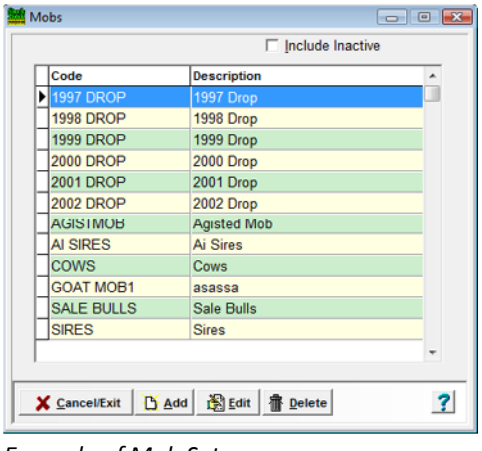
Go to **Setup** and select desired list.
Highlight the item to be deleted.
Click on **Delete.**
Confirm the deletion.

Note: You cannot delete an item that still contains at least one active animal within the selected list.

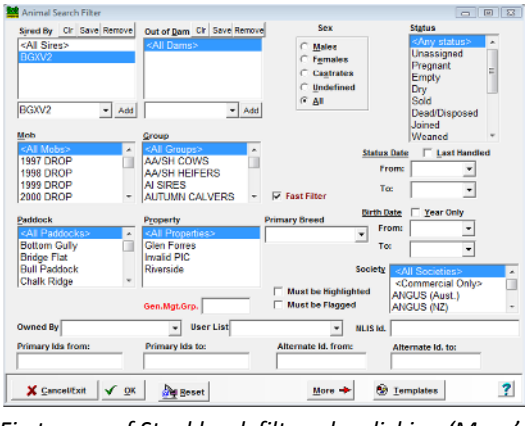
The following outlines **suggested lists** to setup prior to adding your animals. Keep in mind any items can be added on-the-fly by using the plus button next to the drop down list on the appropriate screens.

3.3.1 Setup Mobs

Mobs are a convenient method of organising animals, normally corresponding to physical mobs in paddocks. A mob can, however, be split over several paddocks, and can be used as a wider grouping method than a paddock.



Example of Mob Setup



First page of Stockbook filter - by clicking 'More' allows you to access another 3 pages of filter options.

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You may choose to setup your mobs as e.g. sale bulls, young bulls, autumn calvers, Rams etc. or use the year drop as the mob name. It's purely a personal preference, but keep in mind how you would like to find/search for these animals in the future by using the filter within Stockbook. The filter allows you to filter/search on criteria such as mob, group, paddock through to more advanced criteria such as weights, carcass feedback, and fleece data. *(See sample on first page of Stockbook filter).*

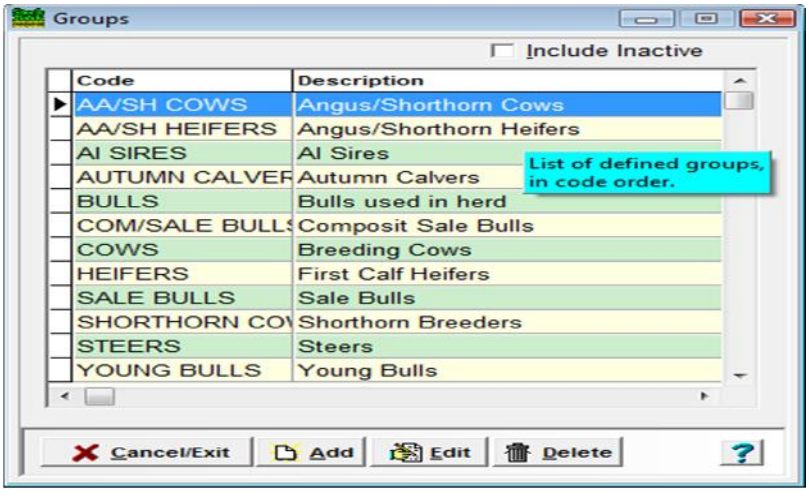
Animals can be in several different mobs or groups over their lifetime but can only be in one mob or group at any one given time. You can make a mob inactive or delete it. If you wish to view inactive mobs tick include inactive box.

Note: A mob cannot be made inactive or deleted if there are currently active animals in that mob.

Go to **Setup > Mobs** menu option. A list of current active mobs will be displayed. Note: This will be blank the first time. From this display you can: **Add a new mob, Edit a mob or Delete a mob.**

3.3.2 Set up Groups

Groups are a convenient method of organising animals outside a paddock or mob. A group could be set up for a particular management purpose e.g. breeding cows, sale bulls etc. You may decide not to put animals into a group initially and only move some into a group if the need arises at a later date.



Example of Group Setup

Go to **Setup > Groups**. A list of current active groups will be displayed.
Note this will be blank the first time. From this display you can:
Add a new group, Edit a group or Delete a group.

3.3.3 Setup Properties

Every animal on file can be assigned to a paddock. Every paddock must be linked to a property.

Go to **Setup > Properties** menu option.
A list of active properties will be displayed. To include inactive properties, tick the **Include Inactive** box. From this display you can:
Add a new property, Edit a property or Delete a property.

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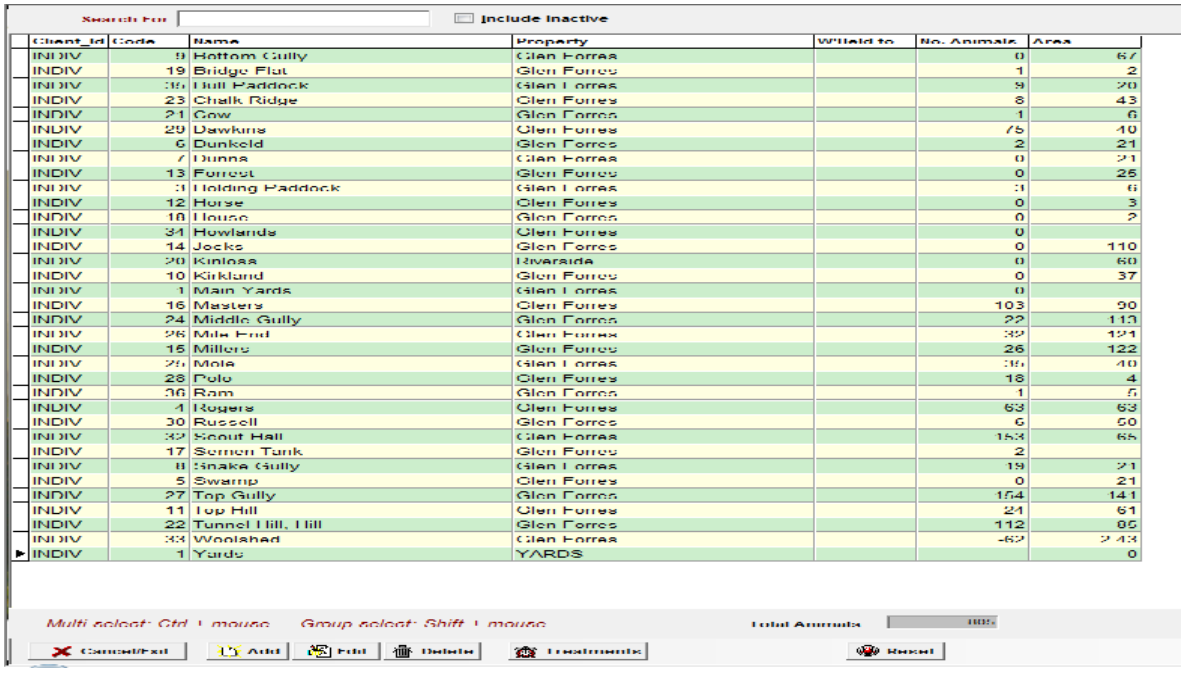
3.3.4 Setup Paddocks

Paddocks relate to a physical paddock, however if you do not wish to use paddocks you can add a paddock that has the same name as your property.

Paddocks are used to record paddock treatments from a quality control perspective, animal grazing history and assist with filtering and reporting.

Go to **Setup > Paddocks** menu option. From this display you can:

Add a new Paddock, Edit a paddock, Delete a paddock or Add Paddock Treatments.



Example of Paddock Setup

Understanding the Paddocks List

This list presents basic details of every paddock in your database.

Important colour coding:

Dark Green Background: Indicates the paddock you have selected. To select paddocks in a continuous group – click on the first paddock hold down the Shift key and then click the last paddock. Individual paddocks may be selected or deselected by holding down the Ctrl key and click on the paddocks required.

Maroon italic: Indicates the paddock is inactive.

Red text: Indicates the paddock is currently in a withholding period due to a previous chemical treatment.

3.3.5 Setup Treatments

Treatments are operations carried out on **animals** or **paddocks** where a **specific product is used.** A description of the treatment type must be setup before they can be used.

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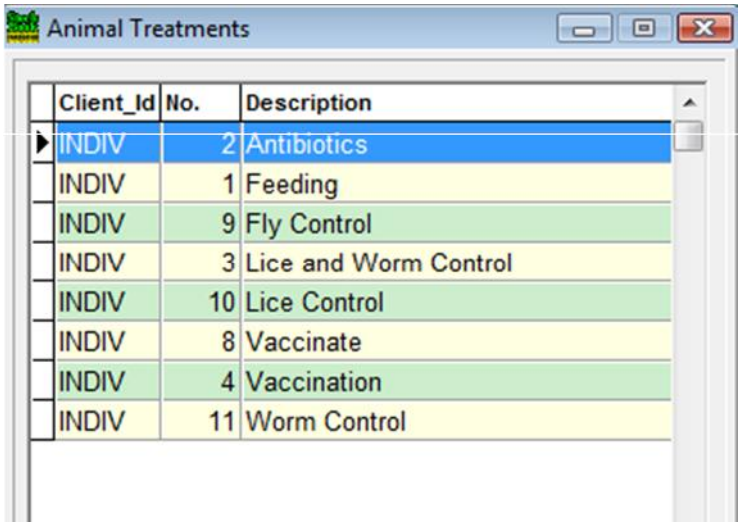
Animal Treatments

Define your own treatment names for animal treatments. We suggest using a general description rather than a treatment method. E.g. 'Internal Parasites' rather then 'Drench' or 'External Parasites' rather than 'Pour-on', 'Vaccination' rather than '5 in 1'etc

Go to **Setup > Treatments/Animal**. From this display you can:
Add a treatment, Edit a treatment or Delete a treatment.

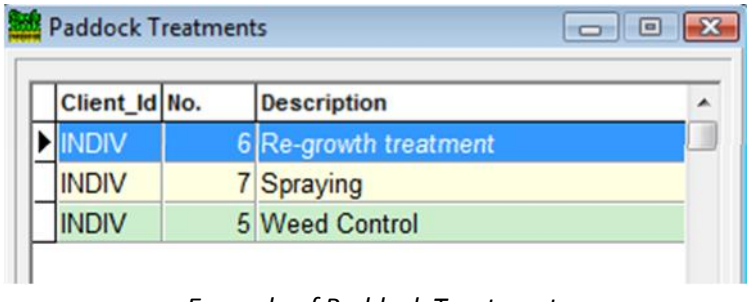


Example of Animal Treatments

Paddock Treatments

Define your own treatment names for paddock treatments. Again we suggest using a general description rather than a treatment method. E.g. 'Weed Control' rather than 'Spray'.

Go to **Setup > Treatments/Paddock**. From this display you can:
Add a treatment, Edit a treatment or Delete a treatment.



Example of Paddock Treatments

3.3.6 Setup Products

Products for use in animal and paddock treatments can be entered via the **setup menu**. E.g. 5 in 1. When adding a product, the **Used in Treatment** field can be selected from the dropdown list you created when you setup treatments.

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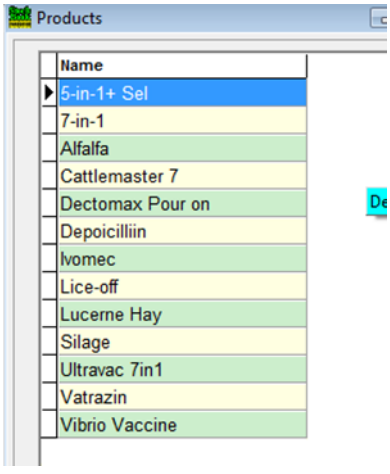
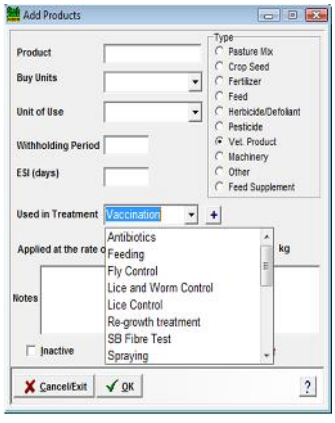
Go to **Setup > Products** or **Products > Setup.** Both will take you to the same **Products** screen. From this display you can: **Add a new product, Edit a product or delete a product.**





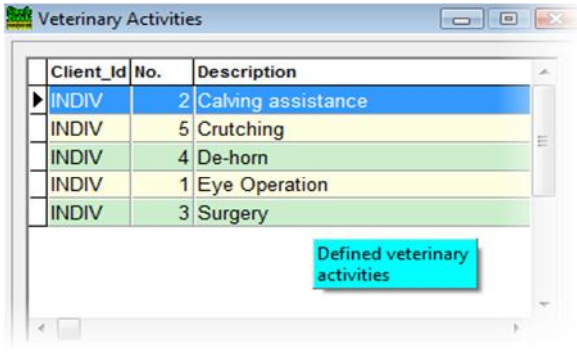
Example of Products setup *Example of Add Products screen*

Note: *After you add the withholding period in days, whenever that product is applied during a treatment the withholding period is added to the treatment date, giving a release date. The animal or paddock will be displayed in red text indicating it is in a withholding period. An attempt to sell this animal will give a warning, as will attempting to move animals into a paddock that is in a withholding period.*

3.3.7 Setup Veterinary Activities

Veterinary Activities relate to **procedures** that are of a general nature and do not require the **use of a** product. (E.g. Brucellosis Testing, Eye Operation, Feet Trimming). You can define as many different activities as you like.

Go to **Setup > Veterinary Activities.** From this display you can:
Add a new veterinary activity, Edit a veterinary activity or Delete a veterinary activity.



Example of Veterinary Activities'

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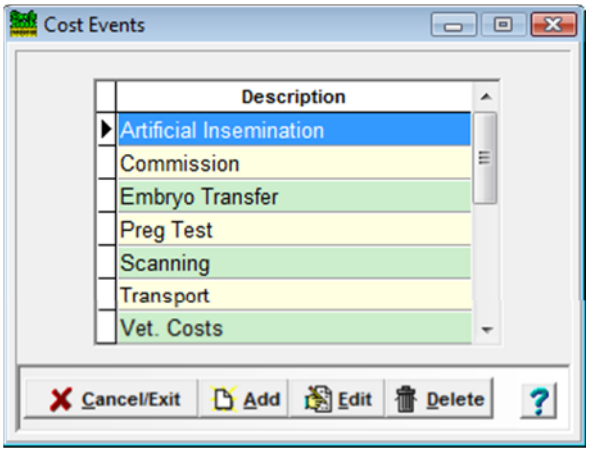
3.3.8 Setup Cost Events

Cost Events are descriptions that you can setup as standard descriptions for recording animal costs eg. Transport, yard dues, commissions etc. You will notice there is already an extensive list setup in this area of the program.

Go to **Setup > Cost Events**. From this display you can:
Add a new cost event, Edit a cost event or Delete a cost event.



Example of Cost Events

3.4 Setup User Options

User options allow you to customise parts of Stockbook.

Go to **Setup > User Options**

The six user option tabs are:

- General
- Options
- Screen
- User Fields
- Colours
- Animal Display

Suggested areas to setup initially are:

Go to General tab – Enter your trading name. This is the name you would like to appear at the top of any reports generated through Stockbook.
Installation type must be set on "Normal" (Both for Stud and Commercial users) unless the program is being operated by a Breed Society. E.g. You are an actual Breed Society.
Performance Recording System is only used if you submit data to a performance recording system. You do not need to do this if you are enrolled in Breedplan.

Go to Options tab – select your preferences by ticking or unticking the boxes.

Go to User Fields tab – This allows you customise/change the labels on the 'Basic Animal Details' screen; it is advisable to keep alternate ID and NLIS ID as is.

Go to Animal Display tab – This allows you customise your main animal display screen.
Put a tick in the box beside each field you would like to have displayed.
When you have completed choosing the fields you wish to have displayed, click **Assign** and then click **OK.**

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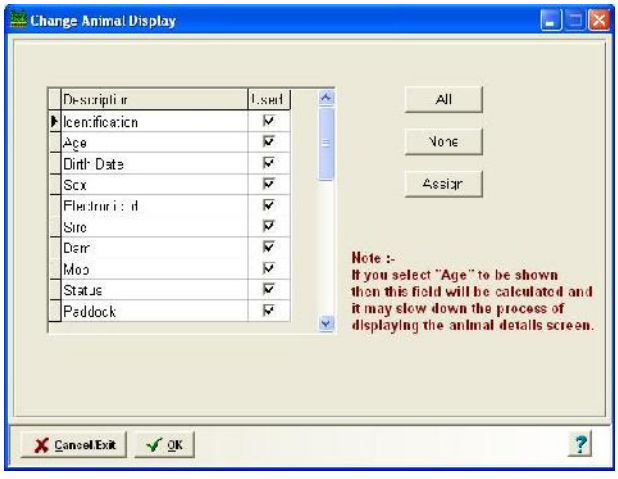
Note : The weight option displays the last weight taken for that animal. The Micron option (for sheep producers) displays the last Micron measured.

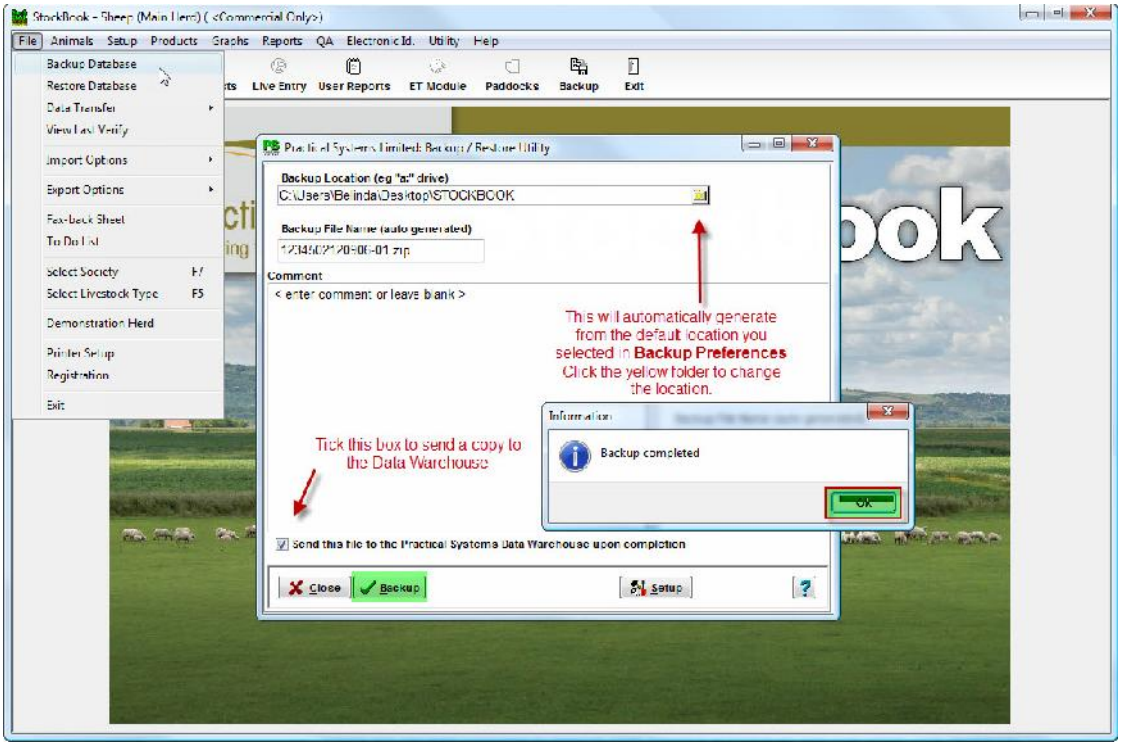


Now you have completed your setup you have a great head start to minimizing data entry.

For Stud operations, please complete the section "Additional setup for Stud Operations" in Part 5 of this quick start guide. Setting up Stud information is strongly recommended before adding your animals.

3.5 Backing Up

FOLLOW THE STEPS BELOW AND BACKUP YOUR DATA SO FAR, BEFORE ADDING ANY ANIMALS.



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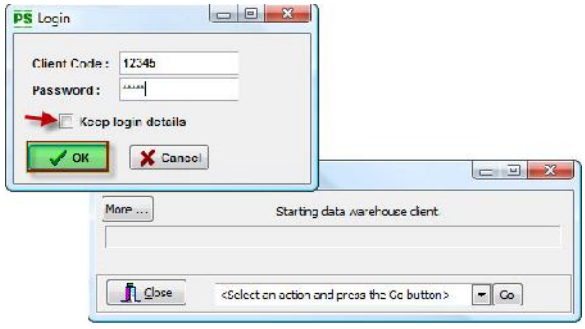
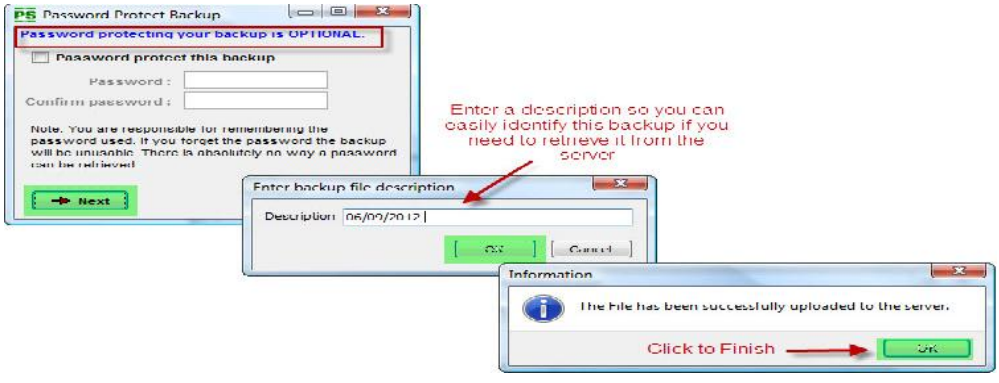
If you chose to Send a copy of the backup to the Practical Systems Data Warehouse:

- Once you click **OK** to complete the local backup you will be required to login to the Data Warehouse using you **Client ID** and **Password** (the first time you login your password will be you Client ID, and you will be prompted to set a new one, see section 3.2.1)

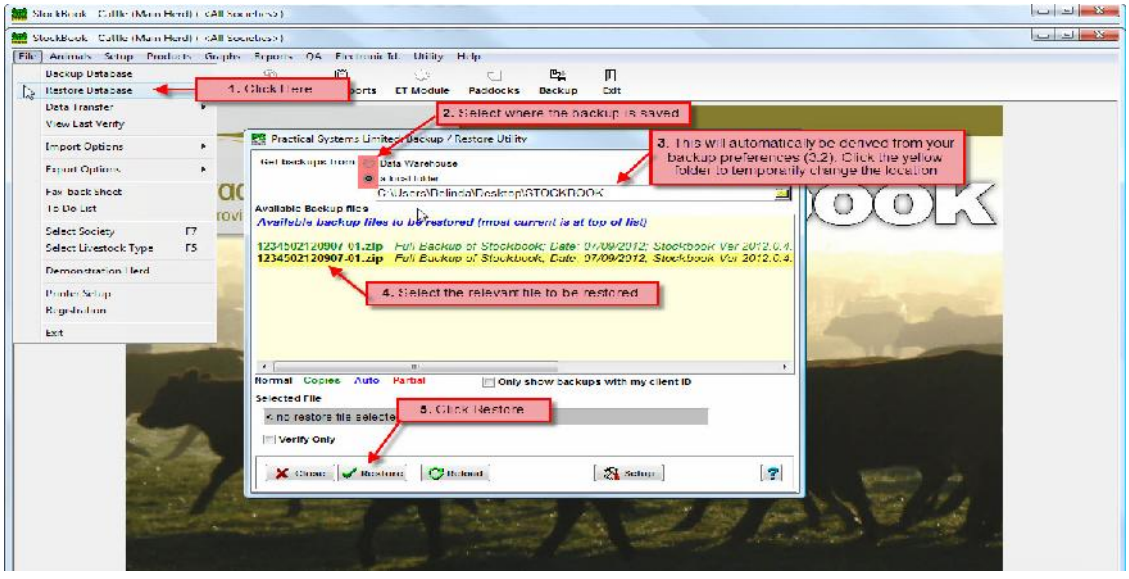


- Once you've successfully logged onto the serve, you have the option to **Password Protect** the backup. This is completely optional, click **Next** to continue
- Enter a backup file description, such as the date of the backup or the activity that you completed in Stockbook that session.



3.6 Restoring a Backup

In the event of things "going pear shaped while adding your animals" you can simply **restore** your **backup** that you made prior to adding animals and try adding animals again. If restoring from the Practical Systems Data Warehouse please refer to the User Manual.



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4 Adding your animals Into Stockbook

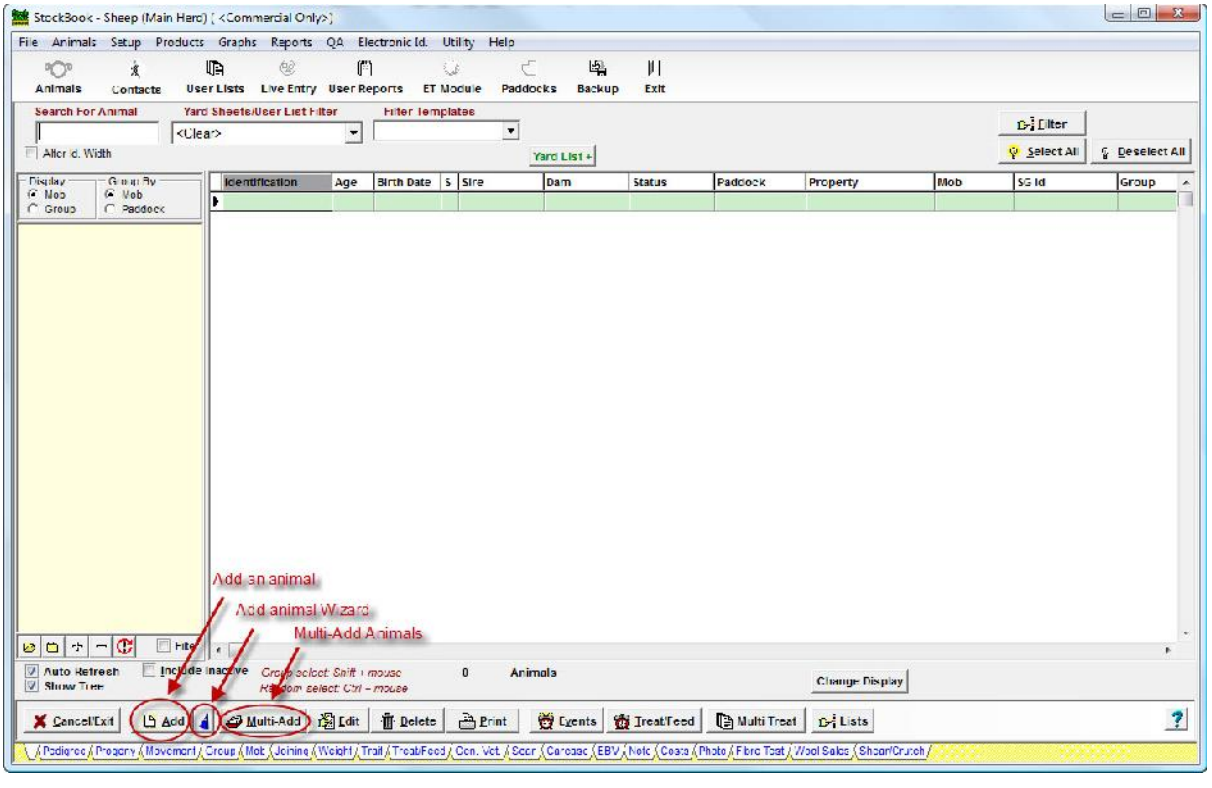
☝ There are various methods of adding your existing animals for the first time. The following illustrates how to manually add animal details.

☝ For a full list of methods for adding animals refer to section 4.5 of this quick start guide.

4.1 Manually Adding Animals into Stockbook

There are a few options for manually adding animals –

Option one – Use the **Add button** from the main animal screen (see section 4.2)
Option two – Use the **Add animal wizard** (see section 4.3)
Option three – Use **Multi-Add** (see section 4.4)



Example of where to find the various ways of manually entering animals

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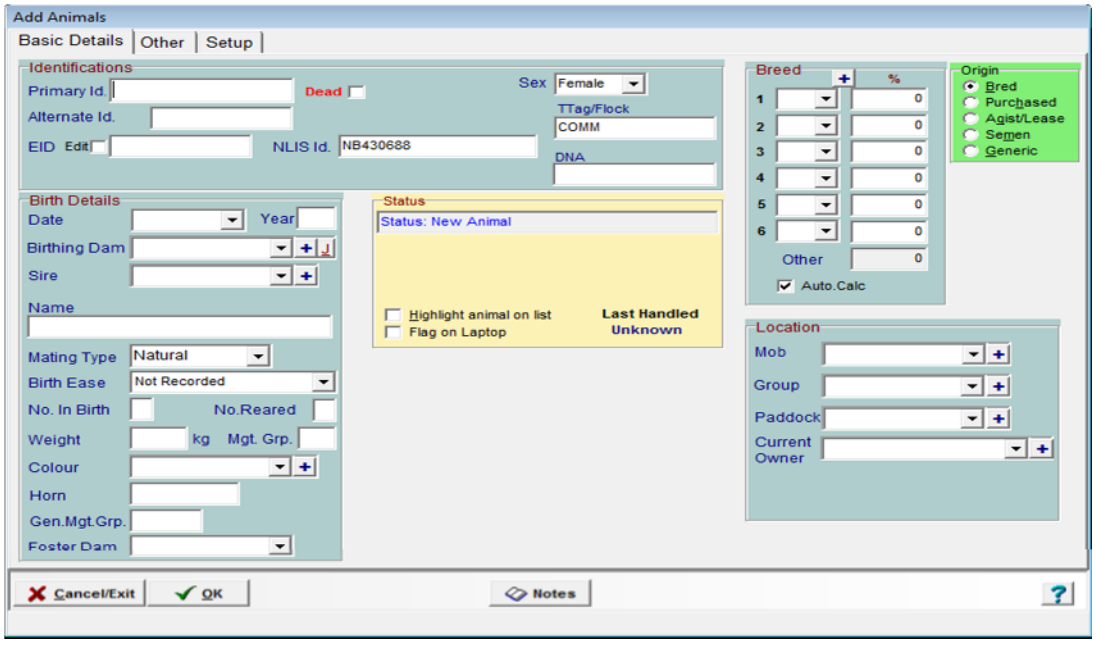
4.2 Using the Add button

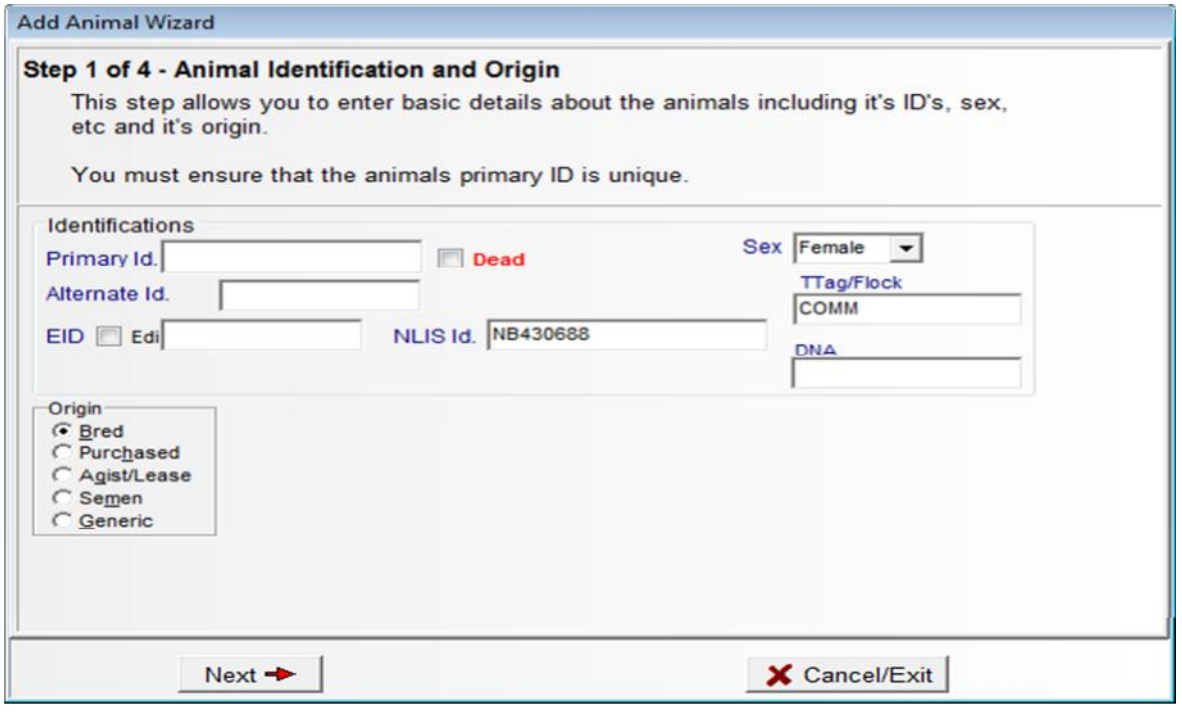
Manual data entry allows you to enter as little or as much information as you require. If you do not add a Primary Id (visual ID) Stockbook will generate one for you.



Example of option one – Using Add button

4.3 Using the Add Animal Wizard

Using the add animal wizard steps out the process of adding an animal over a series of 4 screens. If you do not add a primary Id (visual ID) Stockbook will generate one for you.



Example of option two – Using the Add Animal Wizard

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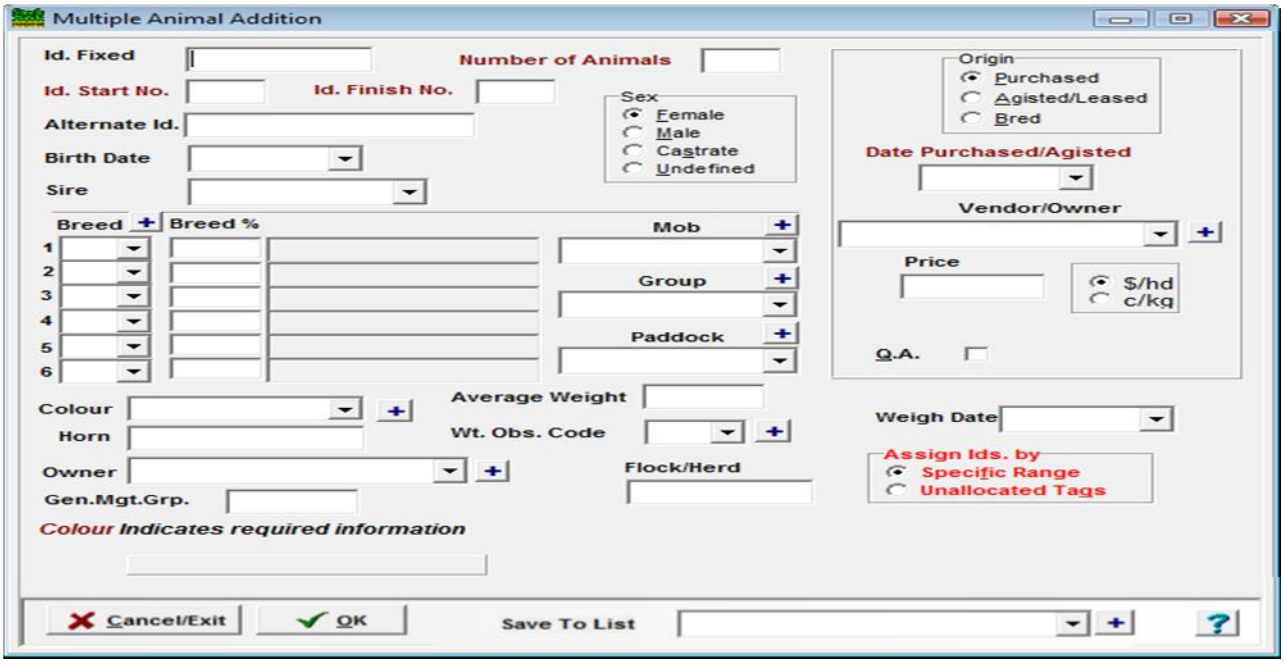
4.4 Using the Multi-Add

Multi-Add allows you to add a number of animals either by allocating a specific Visual ID range or by retrieving tags numbers from an unallocated tag list.



Example of option three – Using the multi-add

4.5 Methods for Entering Animals Into Stockbook

As mentioned there are various methods of adding your existing animals for the first time. The following table illustrates the various options for entering animals into Stockbook. Use this table to help you decide the easiest way to enter your animals based on your type of operation, equipment and animal information you have.

Method of entry into Stockbook	***Equipment Needed***	***Recommended for***	***Ease of use***
Manual Data Entry via the add animal, add animal wizard or Multi add screen. Starting at your oldest animal first.	Stockbook computer Visual Id numbers and animal details	This method is recommended for small herds/flocks.	Easy
Data Extraction from your Breed Society.	Data Extraction forms are available from Practical Systems.	This method is recommended for setting up Stud animals.	Easy
CSV Import or import from data collector file.	Stockbook Computer Excel file converted to a CSV file or Data collector file	If you have animal information in excel spread sheets (note this will need to be saved as CSV files before importing into Stockbook. You can also import files that been created from data collectors.	Moderate knowledge of excel & CSV files required

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Import data direct from collector	Stockbook Computer Data collector	This allows you to import direct from your weigh scales	Moderate knowledge of hardware required
Transfer data from reader	Stockbook Computer Reader with storage	This allows you to add animals by downloading direct from your reader	Moderate knowledge of hardware required
Using the laptop screen	Stockbook & laptop computer to use in yards – readers and scales can be directly plugged into the laptop but are not essential for using the lap top screen.	This option offers a quick effective method of adding animals.	Ability to operate lap top computer and hardware in the yards.
Download a tag bucket file from NLIS database	Stockbook Computer with internet access.	This method allows you to download existing animals and unassigned tags assigned to your PIC from the NLIS database. This information can then be imported into Stockbook.	Moderately computer literate

4.6 Animal Types

Once your animals are entered your animals into Stockbook they can be seen by clicking on the Animals icon.

You will notice there are three types of animals in Stockbook:

1. Current Animals - The current animals are ones on your farm at this moment.
2. Inactive Animals - The inactive animals are those animals that have been disposed of, (either sold or died). You can still view these animals on the main data base, look up their history and include them in reports. (These animals can be viewed by putting a tick in the Show Inactive box.
3. Archived Animals - Animals that have been made inactive can be archived. This procedure removes the animals from the current animal list and moves them to an archived database. The benefit of this procedure is to reduce your current animal list. Archived animals can be returned to the current animal list if needed.

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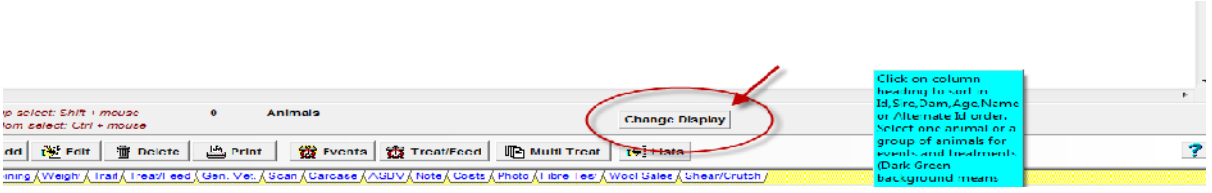
To adjust your main animal display screen, click on change display located at the bottom left of the main animal screen.



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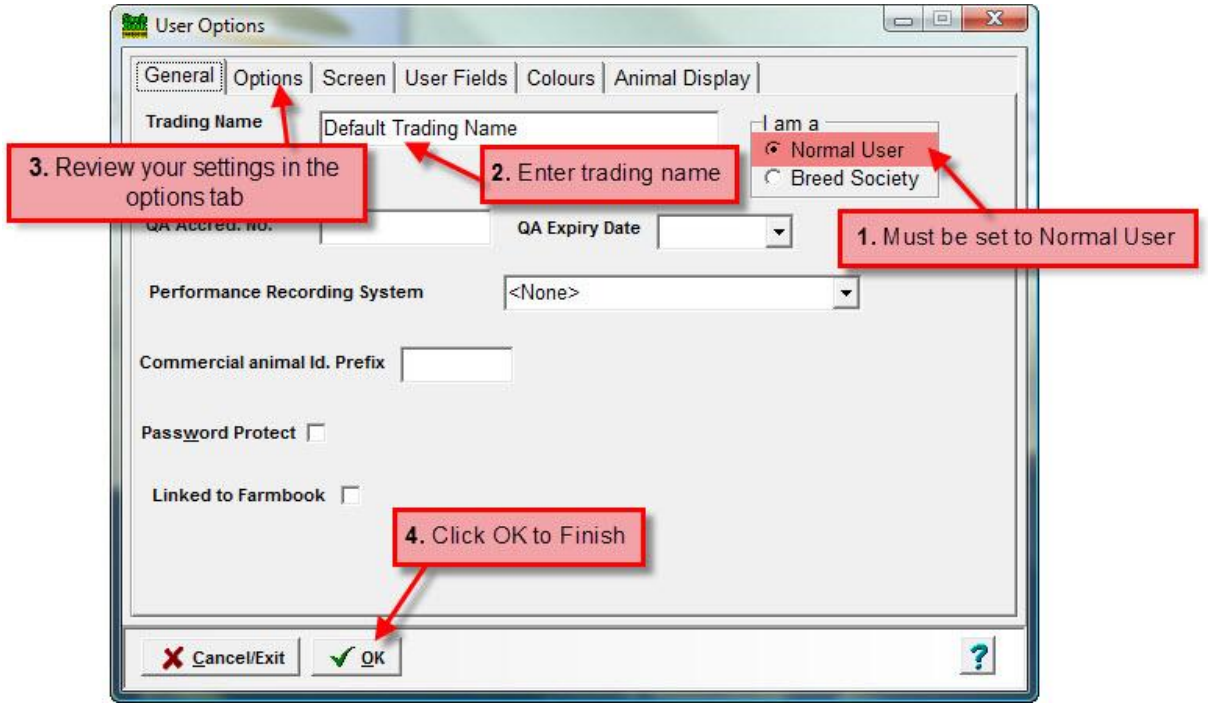
5 Additional Setup for Stud Users

This additional setup is done primarily to facilitate the transfer of data to and from Sheep Genetics, ABRI and Breed Societies.
We have outlined the necessary steps to enable this function.

5.1 Society and Stud Setup for Stud Cattle

Complete the steps below to enable data import and export facility between Stockbook, your Breed Society and ABRI.

Complete **steps 1 – 4** as pictured below



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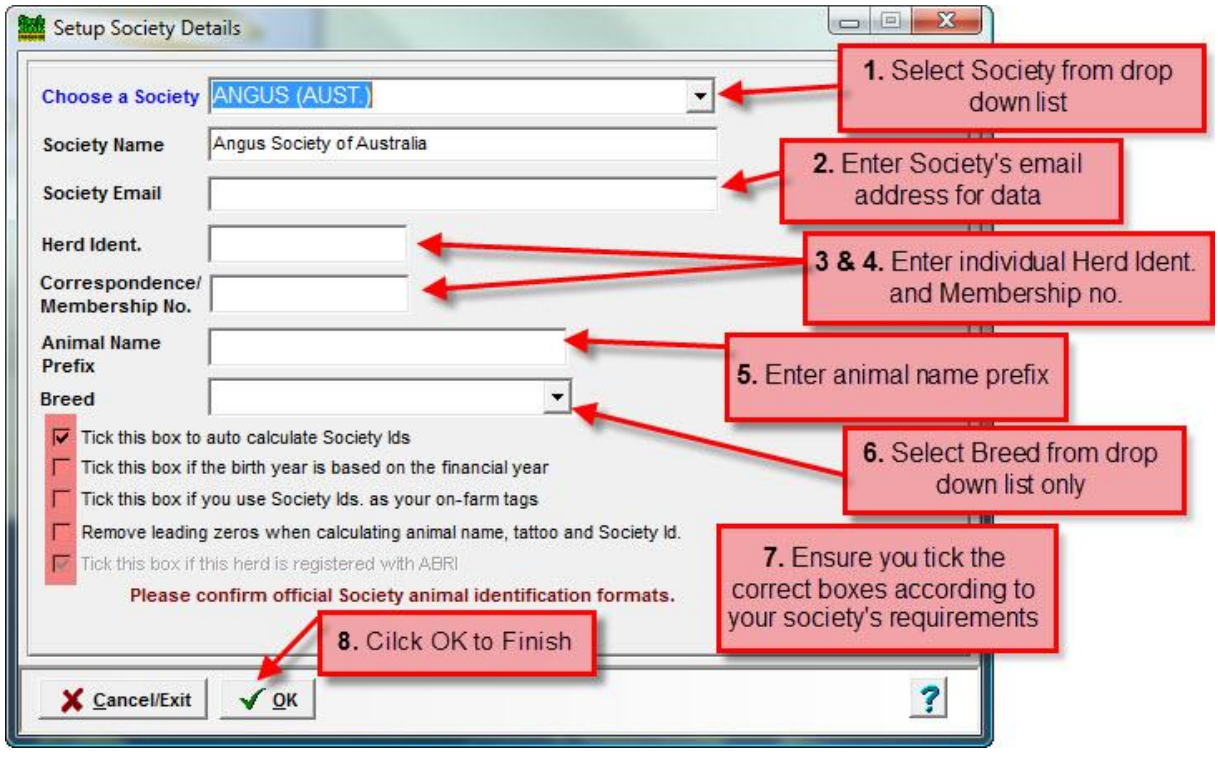
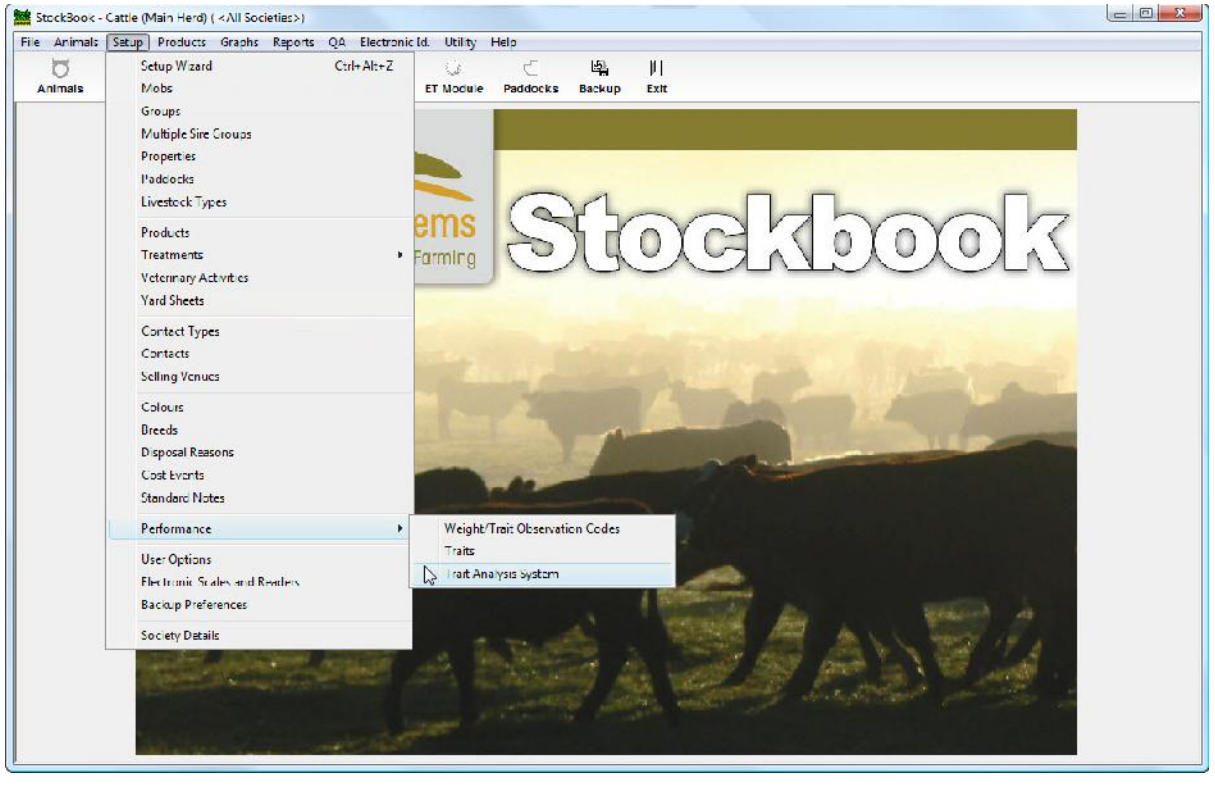
Go to **Setup > Society Details** &Follow **steps 1 – 8** as pictured below



5.1.2 Setup Performance Recording for Cattle

Complete the steps below to Setup your Trait Analysis System for Cattle

Go to **Setup > Performance > Trait Analysis System**



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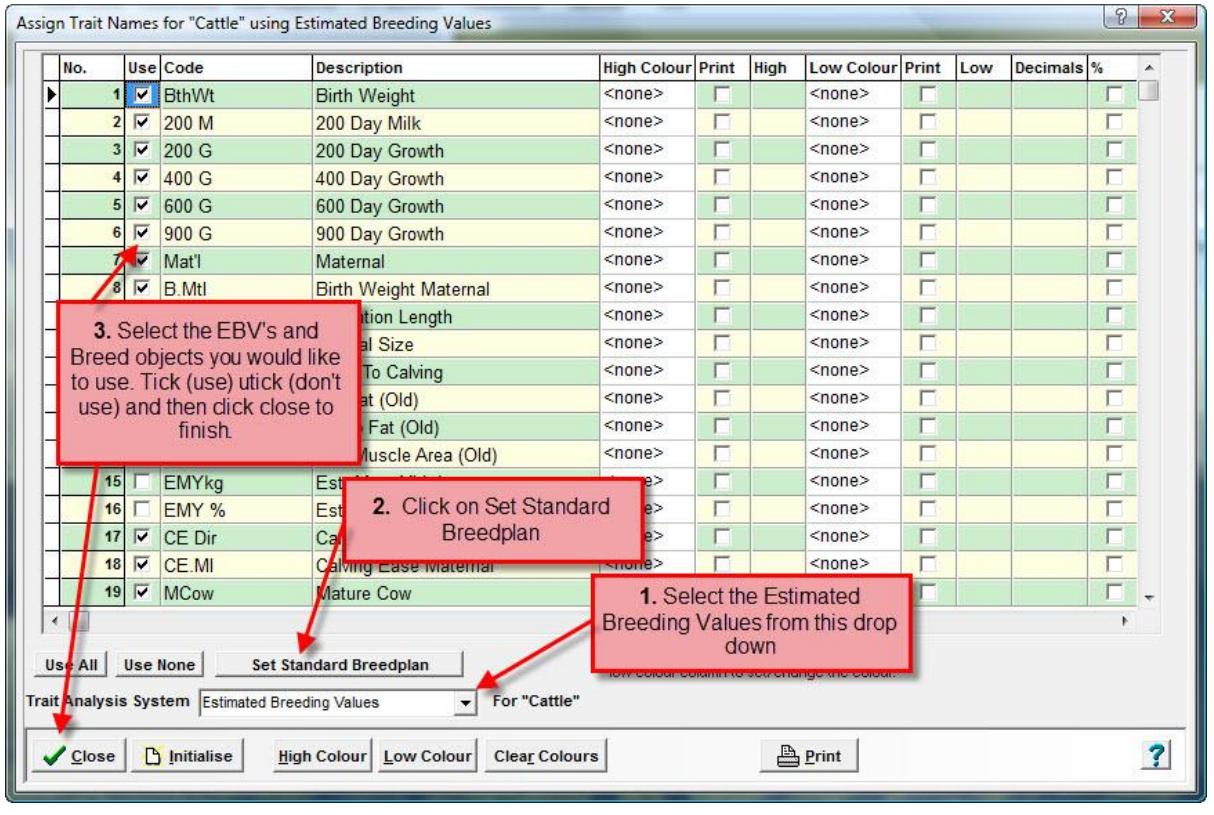
Follow the steps 1-3 below



No.	Use	Code	Description	High Colour	Print	High	Low Colour	Print	Low	Decimals	%
1	☑	BthWt	Birth Weight	<none>	☐		<none>	☐			☐
2	☑	200 M	200 Day Milk	<none>	☐		<none>	☐			☐
3	☑	200 G	200 Day Growth	<none>	☐		<none>	☐			☐
4	☑	400 G	400 Day Growth	<none>	☐		<none>	☐			☐
5	☑	600 G	600 Day Growth	<none>	☐		<none>	☐			☐
6	☑	900 G	900 Day Growth	<none>	☐		<none>	☐			☐
7	☑	Mat'l	Maternal	<none>	☐		<none>	☐			☐
8	☑	B.Mtl	Birth Weight Maternal	<none>	☐		<none>	☐			☐
			tion Length	<none>	☐		<none>	☐			☐
			l Size	<none>	☐		<none>	☐			☐
			To Calving	<none>	☐		<none>	☐			☐
			t (Old)	<none>	☐		<none>	☐			☐
			Fat (Old)	<none>	☐		<none>	☐			☐
			luscle Area (Old)	<none>	☐		<none>	☐			☐
15	☐	EMYkg	Est	e>	☐		<none>	☐			☐
16	☐	EMY %	Est	e>	☐		<none>	☐			☐
17	☑	CE Dir	Ca	e>	☐		<none>	☐			☐
18	☑	CE.MI	Calving Ease Maternal	<none>	☐		<none>	☐			☐
19	☑	MCow	Mature Cow					☐			☐

☝ You must select a minimum of one and a maximum of 19 EBV's, at least one Breed Object and a maximum of 6.

This completes the Society and Stud Cattle Setup

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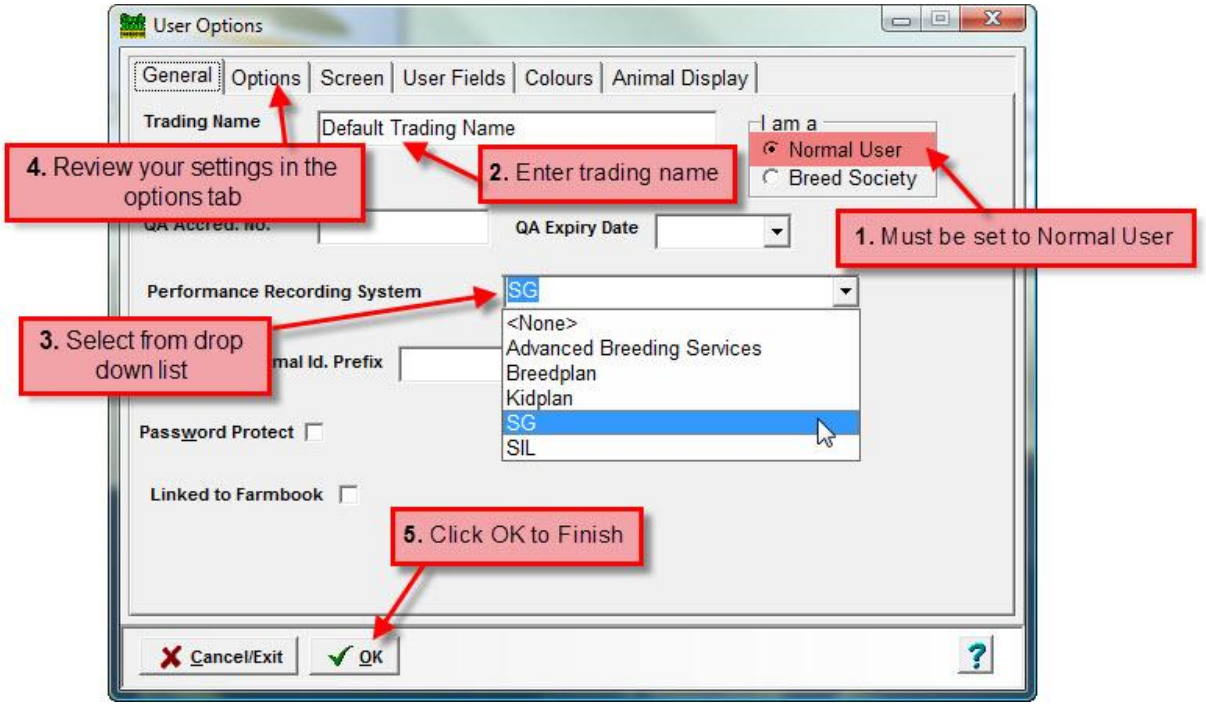
5.2 Flock and Performance Recording Setup for Stud Sheep

Please complete the steps below to enable data the transfer of data between Stockbook, Sheep Genetics and your Breed Association.

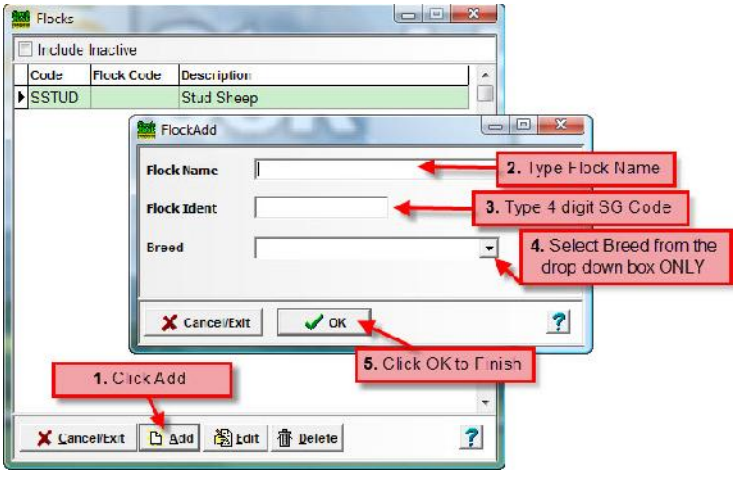
Go to **Setup > User Options** > **Follow steps 1 – 5**



It is also advised to review your settings in the options tab

Setup Flock Details

Go to **Setup > Flock Details > Follow Steps 1 to 5**



If you are registering your lambs with a Breed Association please continue.

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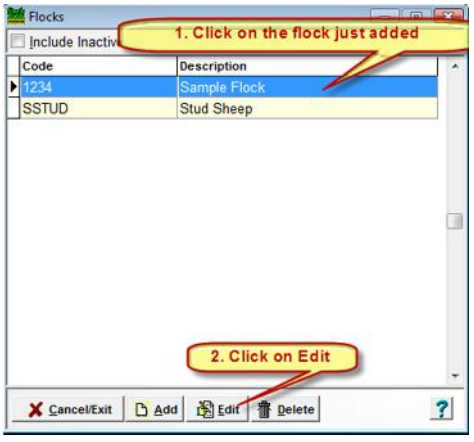
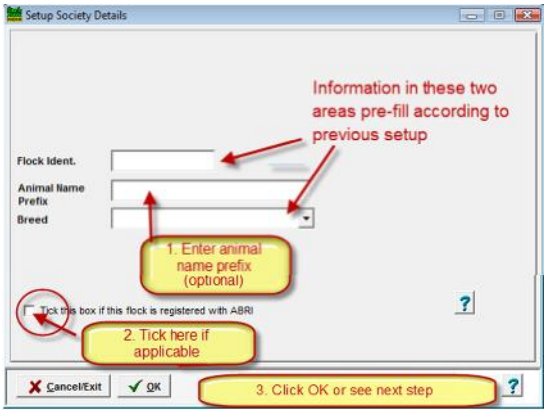
Complete steps 1 & 2 below:



Complete steps 1-3 below:



If your flock is registered with ABRI, please complete the following

Complete steps 1 & 2 below:

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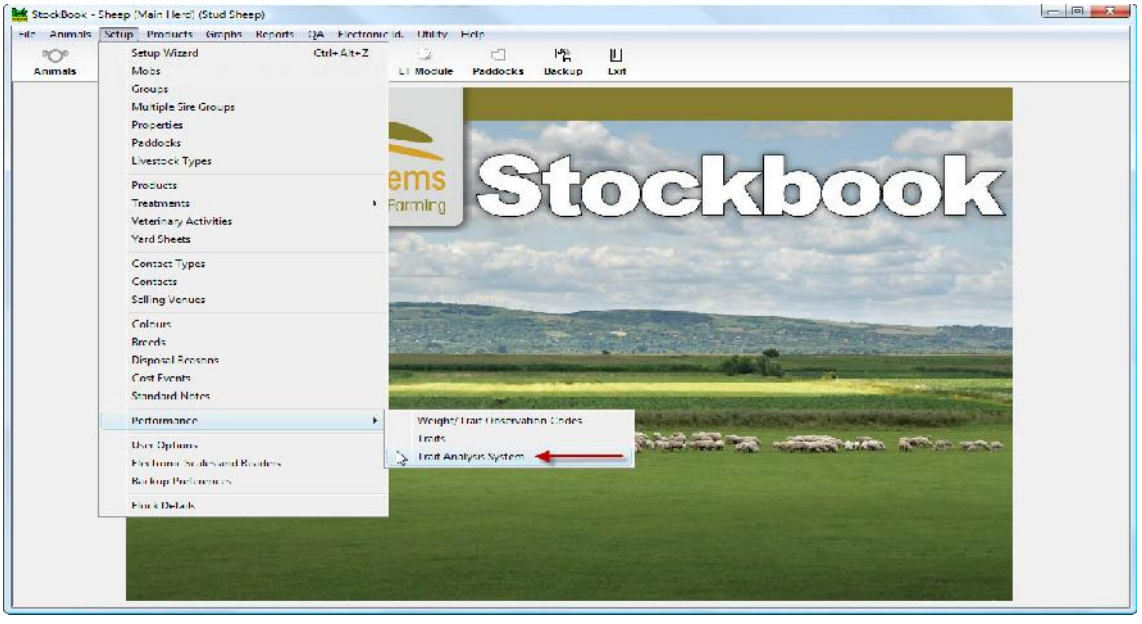
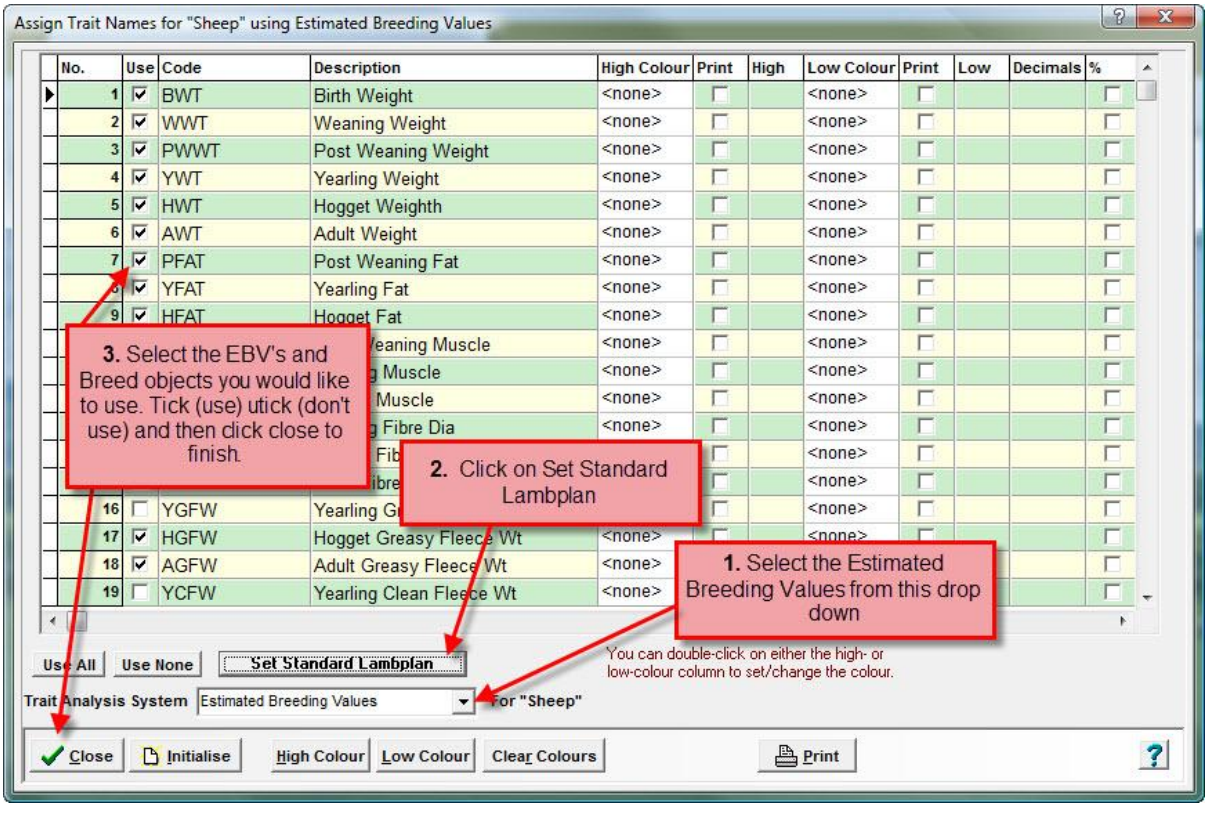
5.2.1 Setup Performance Recording for Sheep

Complete the steps below to Setup your Trait Analysis System for Sheep

Go to Setup > Performance > Trait Analysis System



Complete Steps 1- 3



You must select a minimum of one and a maximum of 19 ASBV's, at least one Breed Object and a maximum of 6.

This completes the setup for Stud Sheep.

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