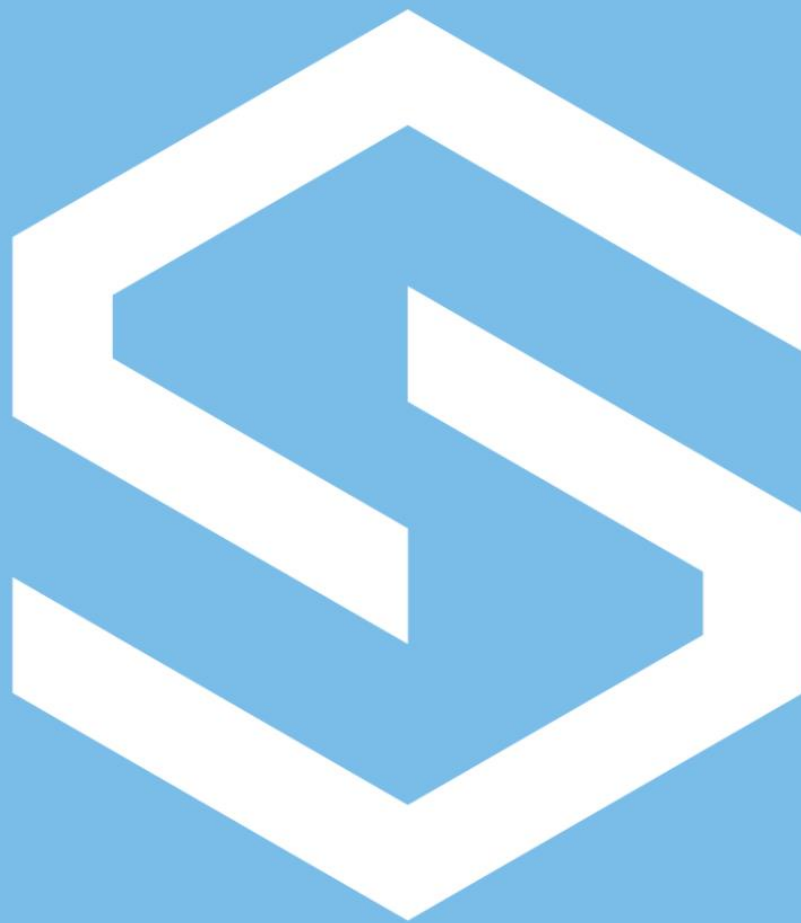# Your data Your way!

Practical, powerful and profitable livestock management software.

STOCKBOOK
Quick Start Guide

Stockbook

Contents

For more detailed instructions, please refer to the

Stockbook (SB) Knowledge Base

https://kb.outcrosssystems.com.au/portal/en/kb/stockbook

STOCKBOOK QUICK START GUIDE

This Quick Start Guide offers a quick way to begin using and understanding Outcross Systems - Stockbook.

1   Installing & Registering Stockbook

1.1   How to Install Stockbook

- Go to the **Outcross Systems website www.outcrosssystems.com.au**
- Click on **Client Support > Stockbook** > Client **Downloads**
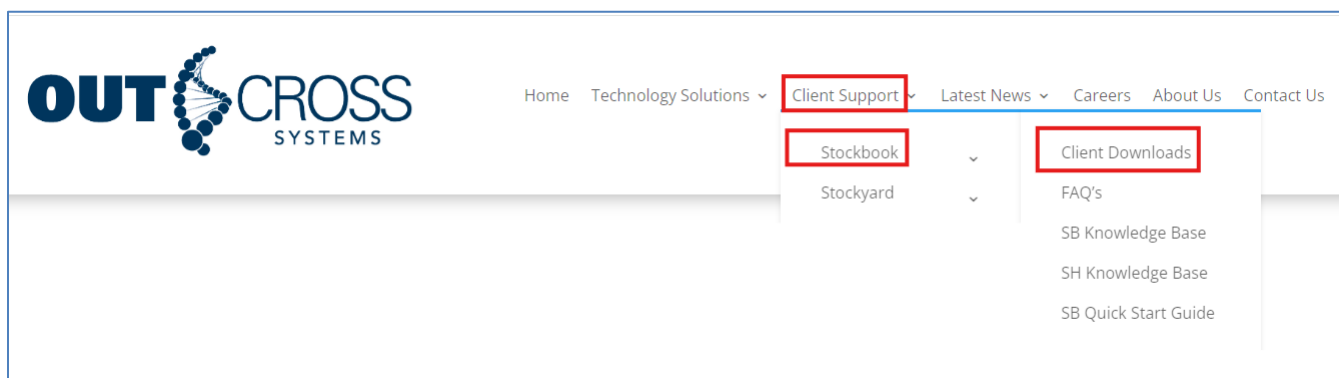
- Enter your **Client ID** and **Password**, then click **Login**.
- Click on the **Download Now**.
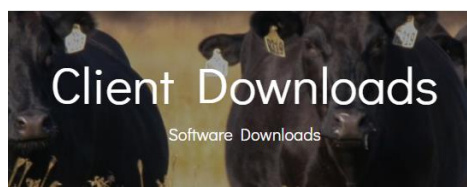
- Click **YES** to 'Do you want to allow the following program to make changes to this Computer?'

- Follow the prompts to complete the **Installation process.**

1.2   Registering Stockbook

To register Stockbook after installation:

- Go to your desktop and click on the Stockbook icon.
- Enter your **Client ID** and **Password**
- Click on **Register Now**
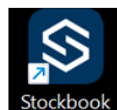
This will register the program and
you will be able to start using Stockbook.

You will now be given the option to open the Quick Start Guide and use the set-up wizard.

If you are saying **No** to the setup wizard, you can then begin to setup as per instructions outlined in this guide.

2   STOCKBOOK HELP

2.1   On Screen Help

Go to the **Help** tab > **Help Centre**
Or
For help from within a particular area of the program:

Press the **F1 key** or click the [?] **button** at the bottom right of the screen.

2.2 Stockbook (SB) Knowledge Base

- An online library providing step-by-step instructions on how to use the various features of Stockbook.
- Go to **www.outcrosssystems.com.au**
- Click on **Client support > Stockbook > SB Knowledge Base**
- In the **Search articles** text box, enter one or more keywords to find related documents. OR
- Select a **Category** and a list of related knowledge base articles will appear.

2.3   Outcross Systems Software Support Desk.

Support is available during business hours (8.00am to 5.00pm Monday to Friday AEST)

Phone **1800 799 107** Or email **support@outcrosssystems.com.au**.

3   SETTING UP STOCKBOOK

The following illustrates how to set up a commercial and/or Stud operation. Setup is strongly recommended before adding your animals.

Before we proceed, please make sure you are in the **Default Database**.
Click on the **File** > **Other Databases** > **Default Databases** menu option.
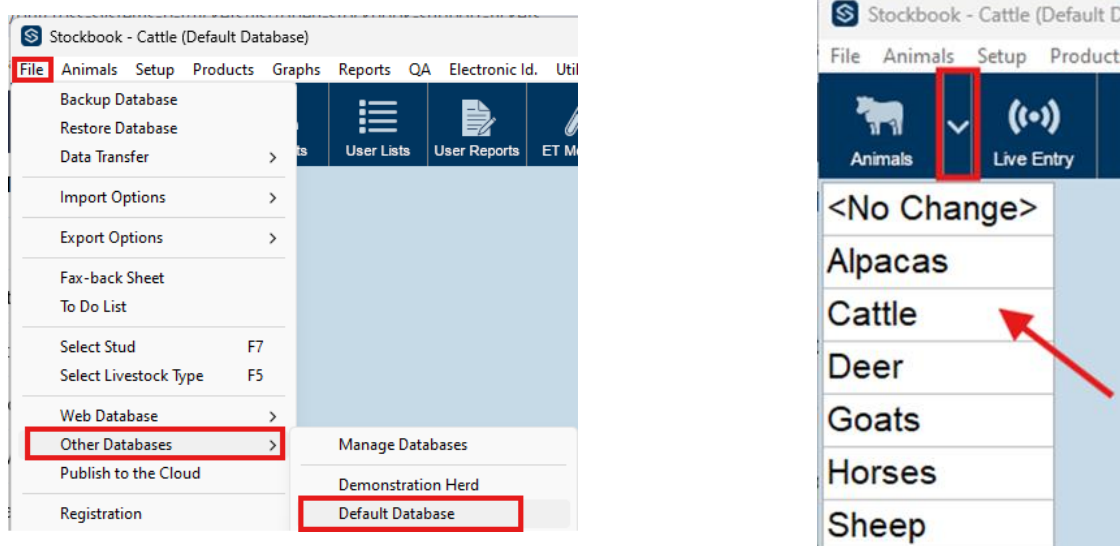
Now select the livestock type that you wish to set up:
- Click the **down-arrow** adjacent to the **Animals** toolbar option.
- Select a livestock type from the drop-down list.

3.2   Setup User Options – General Tab

Suggested areas to setup initially are as follows:

- **Trading Name** – Enter your trading name.
- **Installation type must be set on "Normal User"** (Both for Stud and Commercial users) unless the program is being operated by a Breed Society, i.e. you are an actual Breed Society.
- **QA Accred. No**. – Quality Assurance (Cattle Care) Accreditation Number.
- **QA Expiry Date** – Quality Assurance (Cattle Care) accreditation expiry date.
- **Performance Recording System** – If you submit data to a performance recordingsystem, you specify the system that you use, e.g. Breedplan.
- **Commercial animal Id Prefix** – If you want the Primary Id. for all commercial animals to start with a common set of characters, you can enter that prefix here.
- **I am using …**   **NLIS** (National Livestock Identification System) - Australia
                                                        NAIT (National Animal Identification & Tracing) New Zealand

3.1   Backup

3.2.1 Backup Preference

Backing up is fundamental to managing your Stockbook data.

Click on **Setup** > **Backup Preferences**

- **Backup Location (e.g. "c:" drive)** – click on the **yellow open folder** icon to search where you would like the backup file to be kept.
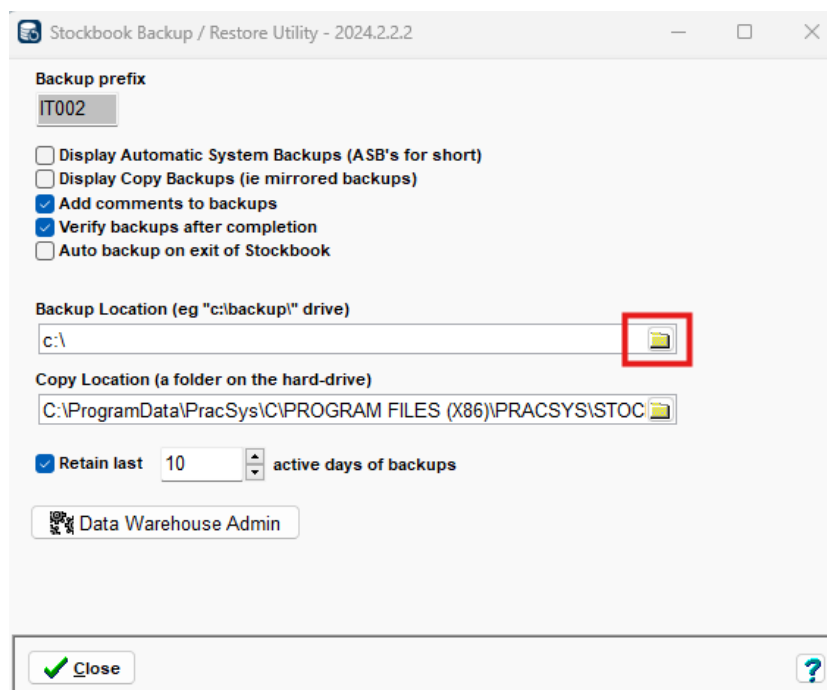
3.2.2 Data Warehouse Setup

The Outcross Systems Data Warehouse is a secure, off-site data storage service, located on the Outcross Systems server.

To set up your Data Warehouse:

- Click on **Setup** > **Backup Preferences > Data Warehouse Admin**

- Click **OK** to the following **Information** message:
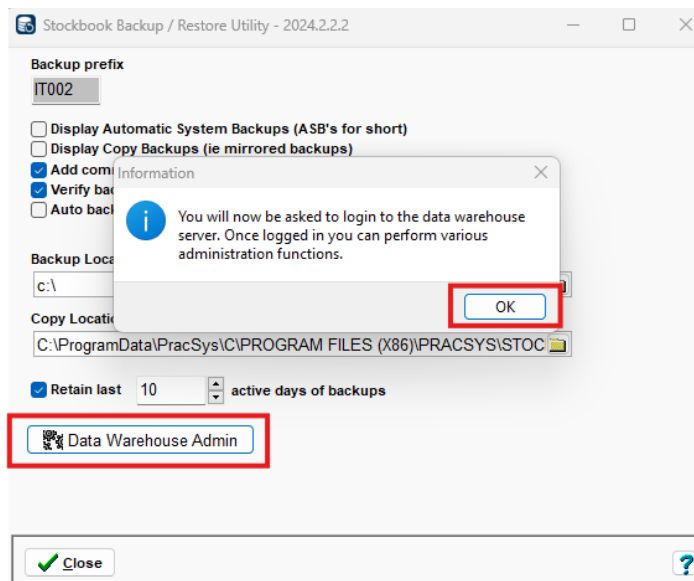
- The **first time you login**, your **username** and **password** will be YOUR Outcross Systems **CLIENT ID**.
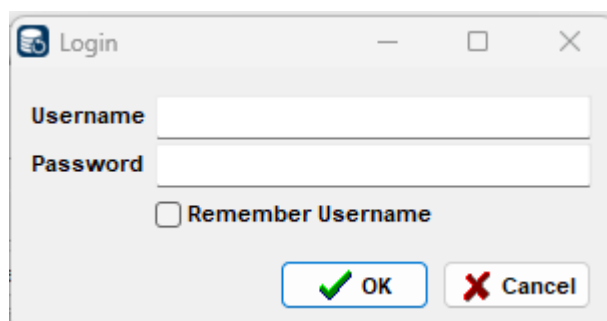
- You will then be prompted to **change your password**.

- Enter a password.

- Enter the same password to confirm.

- Click **OK** button.

3.2.3 How to Backup

- Click on the **File** > **Backup Database**
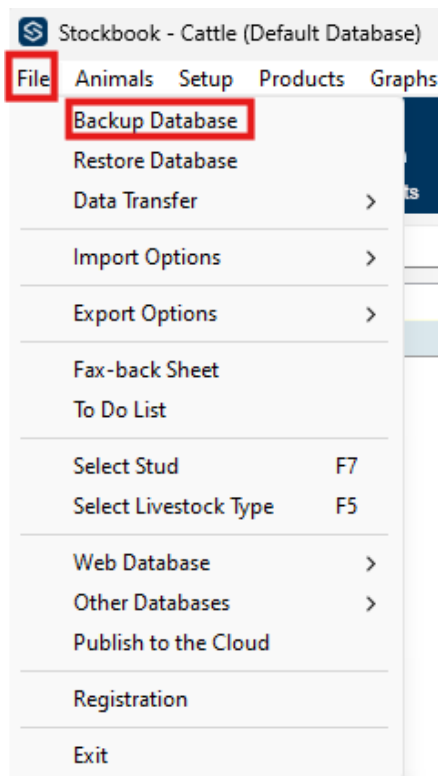
Sending a copy of the backup to the **Outcross Systems Data Warehouse**:
- Tick Send this file to the **Outcross Systems Data Warehouse**
- Click **OK** to: *'Backup completed'*
- Click **OK** to: *'You will now be asked to login to the datawarehouse server. Once logged in your backup will be uploaded.'*
- Login to the Data Warehouse using you **Client ID** and **Password**
- You now have the option to **Password Protect** the backup; this is completely optional. *(Note: if you forget this password, Outcross Systems cannot help you retrieve this backup.)*

- 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.
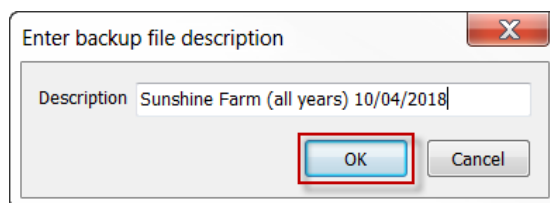
Click **OK** to the Information message: 'The File has been successfully uploaded to the server.'

3.2.4 Publishing a database to the cloud.

This allows access to your database on other devices including the Stockhand App. Please contact our support team for assistance with this process.

3.3 The Setup Menus for Mobs, Groups, Livestock Class, Paddocks and Properties

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

Add an item:

3.3.3   Click on **Setup** and then select desired menu option from the list (e.g., Mobs).
3.3.4   Click on **Add** button.
3.3.5   Enter a unique code and description.
3.3.6   Click on **OK** to accept the data or **Cancel/Exit** to close the screen.

Edit an item:

3.3.7   Click on **Setup** and then select desired menu option from the list (e.g., Mobs).
3.3.8   Click to highlight the item to be edited.
3.3.9   Click on **Edit** button.
3.3.10   Modify details as required or make inactive (for items you no longer want to appear in the list
3.3.11   Click on the **OK** to accept the data or **Cancel/Exit** to abort data entry.

Delete an item:

3.3.12   Click on **Setup** and then select desired menu option from the list (e.g., Mobs).
3.3.13   Highlight or select the item to be deleted.
3.3.14   Click on the **Delete** button.
3.3.15   Confirm the deletion.

Mark an item inactive:

3.3.16   Highlight to select the item to be marked inactive.
3.3.17   Select **Edit**
3.3.18   Tick the box next to **inactive**

Note:
- *An item cannot be made inactive or deleted if it still contains at least one active animal.*
- *What you classify as a mob or group is at your discretion based on your management needs.*

3.3.1 Setup Mobs

Mobs are a convenient method of organising animals, normally corresponding to physical mobs on the property or properties.

How you name your mobs is a personal preference, but keep in mind how you would like to find/search for these animals in the future by using the **Filter Option**. For example, you may choose to set up your using the society grade of your animals.
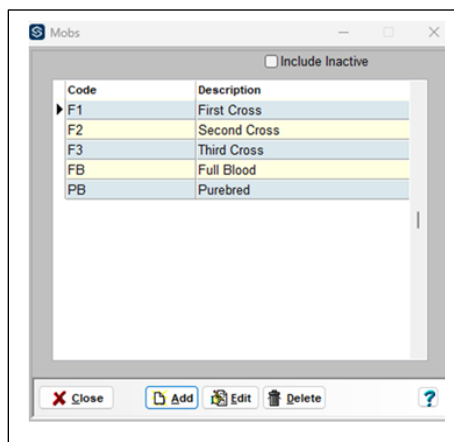
3.3.2. Setup Groups

Groups are a convenient method of organizing animals outside a paddock or mob. A group could be set up for a particular management purpose e.g., using the year drop.
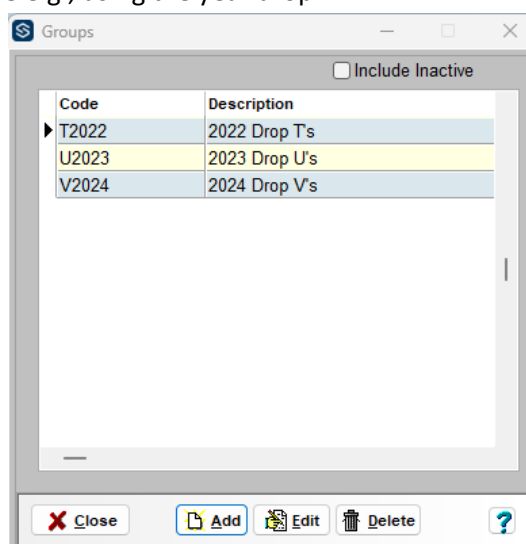
3.3.3. Setup Livestock Class

3.3.4. 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 > **Add** property.

3.3.4 Setup Paddocks

It is not necessary to list all your paddocks, however at least one paddock that has the same name as your property will need to be created. This is important for NLIS records.
Paddocks are used to record paddock treatments from a quality control perspective, animal grazing history and assist with filtering and reporting.

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Click on **Setup** > **Paddocks menu** option > **Add** Paddock.
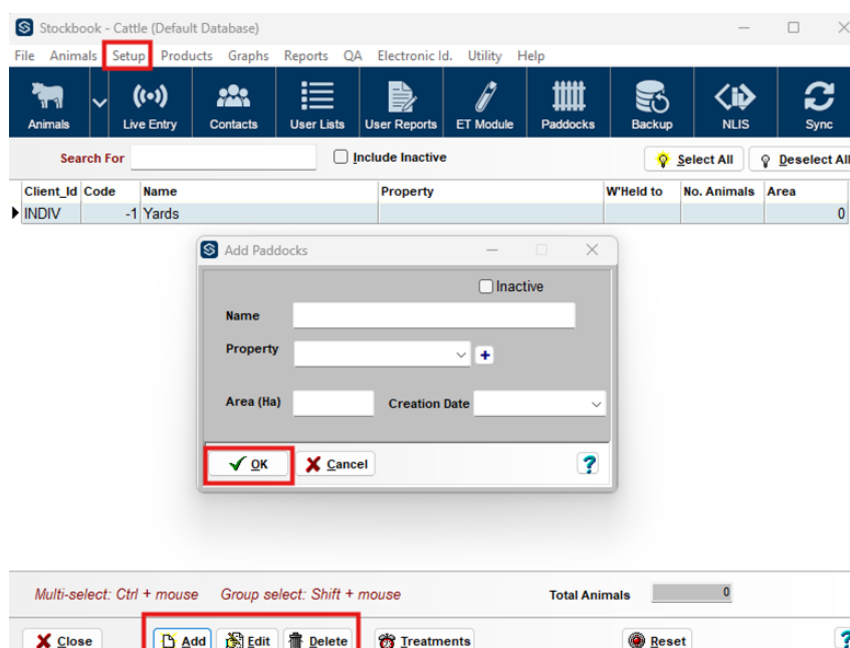
3.3.5 Setup Treatments

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

Animal Treatments

Create a general description for animal treatments. E.g., 'Internal Parasites' rather than 'Drench'; or 'External Parasites' rather than 'Pour-on'; 'Vaccination' rather than '5 in 1'etc.

Click on **Setup** > **Treatments** > **Animal >** Add

Note: Once a treatment has been assigned to an animal at any stage it will not be able to be deleted.

Paddock Treatments

Create a general description for paddock treatments. Again, we suggest using a general description rather than a treatment method. E.g., 'Weed Control' rather than 'Spray'.
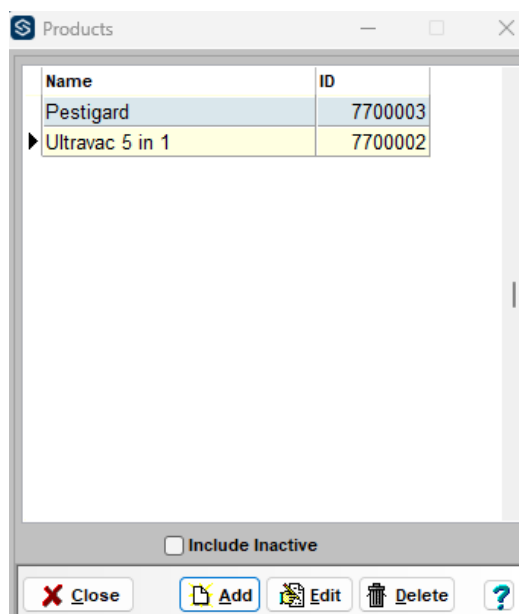
Click on **Setup** > **Treatments** > **Paddock** > **Add**

Note: Once a treatment has been assigned to an animal at any stage it will not be able to be deleted.

3.3.6 Setup Products

Enter the products that are used within the treatments that were set up in section 3.3.5.

Click on **Setup** > **Products > Add** product.

- Select the **Type** of product it is (a Vet. Product is all vaccines/drenches etc.)
- Enter all other details of that product.
- Link the product to a treatment by selecting the treatment from the dropdown list in the **Used inTreatment** section.
- Click on the **OK** button to accept the data.

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 Product Purchases

Products can be entered with batch numbers and quantity on hand to assist you in keeping an inventory of the chemicals and treatments on your property. This setup is essential if you are participating in a Quality Assurance (QA) program.

- Click on **Products** > **Product Purchases** > **Add** products.
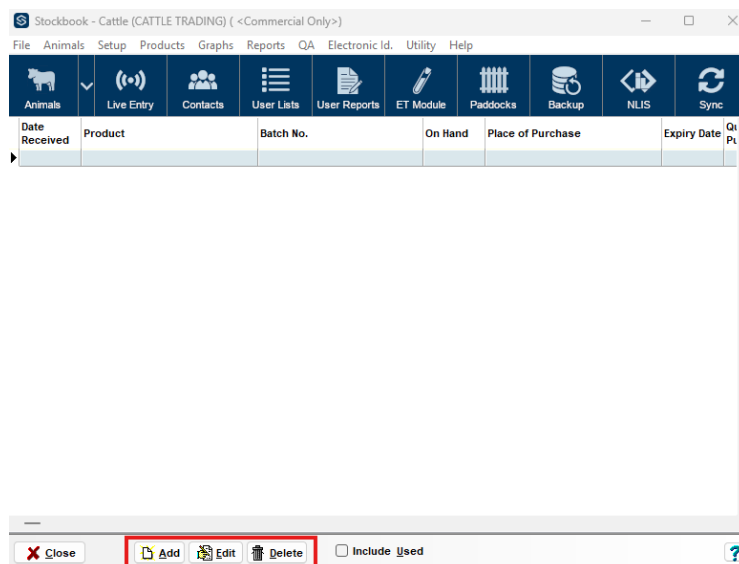
- Enter all details relating to the product. If the product does not have a batch number Stockbook will generate a batch number automatically. You can overwrite this with the actual batch number.
- Then click **OK** to save.

3.3.8 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).

Click on **Setup > Veterinary Activities** > **Add** a veterinary activity.
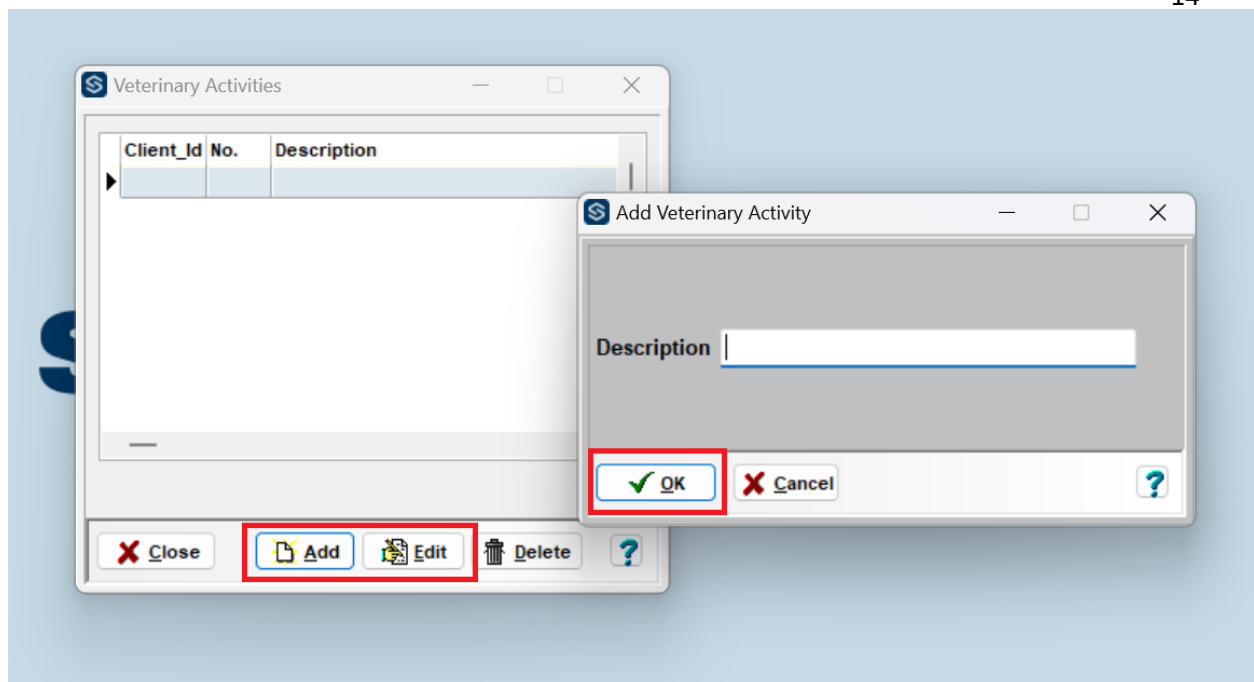
3.3.9 Setup Cost Events

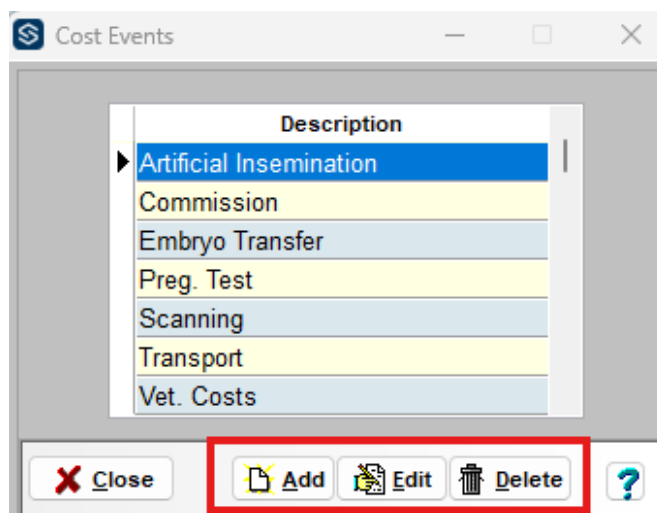Cost Events are descriptions for recording animal costs, e.g., transport, yard dues, commissions etc. Stockbook has an extensive list already setup in this area.

Click on **Setup** > **Cost Events** > **Add** a cost event.

- You will note that only a description can be entered in this list.

4. 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.

4.1 Stud Cattle - Society and Stud Setup

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

Click on the **Setup** > **Stud details** or **Flock details** > **Add, Edit or Delete** stud details.

4.5.1 **Enter Stud name.**

4.5.2 Enter your **Society Email** details - this will be necessary for data transfer.

4.5.3 **Choose a Society** from the drop-down box.

4.5.4 Enter your Herd Ident. This is the identification that will be assigned to your animals Society ID if auto-calculated by Stock book.

4.5.5 Enter your **Correspondence/Membership No**.

4.5.6 Enter the **Animal Name Prefix** this is normally used as the first part of the name of any new animal that you enter into your system. These are characters that are allocated to you by your society.

4.5.7 Select the **Breed** from the drop-down list.

4.5.8 Tick the following boxes that are applicable to you and ensure that they are according to your society's requirements.

4.5.9 Click on the **OK** button.

Note: If you choose Stockbook to auto-calculate the society IDs it will calculate them based off the visual ID.

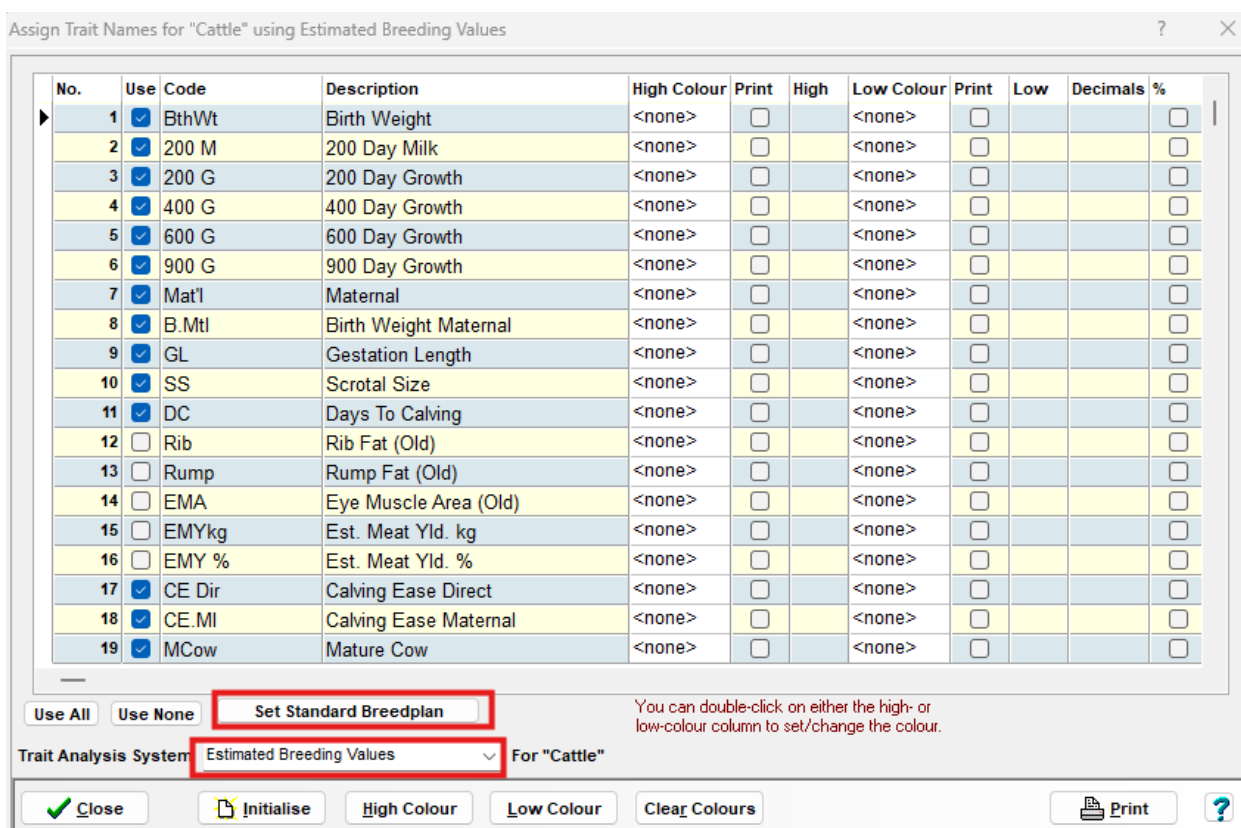## 4.1.1 Setup Performance Recording for Cattle

Stockbook gives you the flexibility of setting up your program for any trait analysis system (e.g. EBV's, EPD 's etc.). However, to do that, it requires you to tell it which system you are using and which values you want used with their names.

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

Click on the **Setup** > **Performance** > **Trait Analysis System**
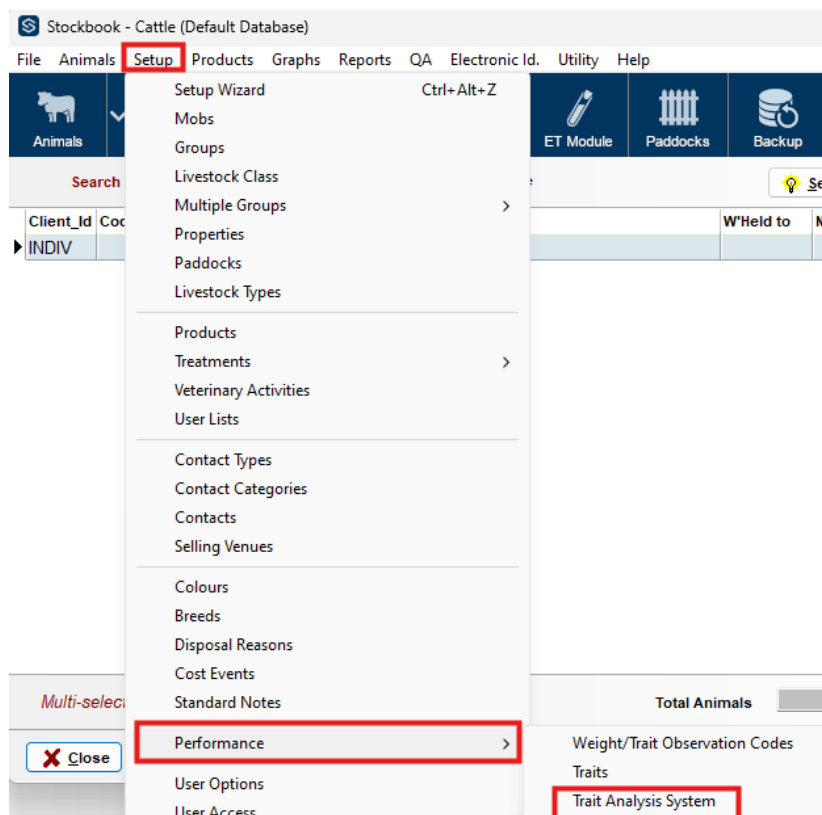
- Click **Set Standard Breedplan** at the bottom of the screen. This will default your traits to those used by Standard Breedplan.
- Select the EBVs and breed objects you require by ticking the **Use** box in the column.
- Select **Estimated Breeding Values** from the drop-down box for the **Trait Analysis system**.

Note: 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

4.2 Stud Sheep - Flock and Performance Recording Setup

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

4.2.1 Setup Flock Details

Click on **Setup** > **Flock Details**

Click on the **Add** button.
Enter your **Flock Name**.
Enter your **Flock Ident** – this will be your 4 digit Sheep Genetics code.
Select your breed from the drop-down list.
Click **OK** to save.

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

4.2.2 Setup Flock Society Details

While still in **Flock Details**, select the Flock to setup society details for, so that it is highlighted blue.
Click on the **Edit** button.

Fill out the **Animal Name Prefix** (optional) and tick the **Tick this box if this flock is registered with ABRI** box if applicable.

Then:
   Enter your **ABRI Ident.** - which is your three-letter prefix.
   Tick any boxes that are applicable to you and your society.
   Click **OK**

Note: By ticking auto calculate society IDs, Stockbook will calculate your SGID based off your Visual ID,birth date and other society information you have entered.

4.2.3 Setup Performance Recording for Sheep

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

Click on the **Setup** > **Performance** > **Trait Analysis System**
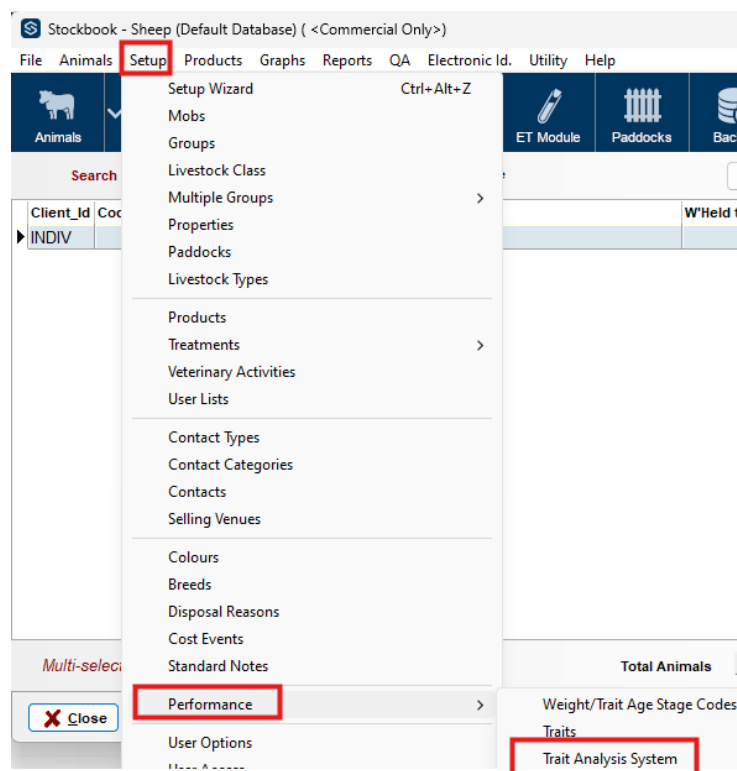
Complete the following steps:

- Click **Set Standard Lambplan** This will default your traits to those used by Standard Lambplan.
- Select the ASBVs and breed objects by ticking the **Use** box in the column.
- Select **Australian Sheep Breeding Values** from the drop-down box for the **Trait Analysis System**.
- Click on the **OK** button.

Assign Trait Names for "Sheep" using Estimated Breeding Values   ?

No.	Use	Code	Description	High Colour	Print	High	Low Colour	Print	Low	Decimals	%
1	✓	EBV1	Estimated Breeding Value 1	<none>	☐		<none>	☐			☐
2	✓	EBV2	Estimated Breeding Value 2	<none>	☐		<none>	☐			☐
3	✓	EBV3	Estimated Breeding Value 3	<none>	☐		<none>	☐			☐
4	✓	EBV4	Estimated Breeding Value 4	<none>	☐		<none>	☐			☐
5	✓	EBV5	Estimated Breeding Value 5	<none>	☐		<none>	☐			☐
6	✓	EBV6	Estimated Breeding Value 6	<none>	☐		<none>	☐			☐
7	✓	EBV7	Estimated Breeding Value 7	<none>	☐		<none>	☐			☐
8	✓	EBV8	Estimated Breeding Value 8	<none>	☐		<none>	☐			☐
9	✓	EBV9	Estimated Breeding Value 9	<none>	☐		<none>	☐			☐
10	✓	EBV10	Estimated Breeding Value 10	<none>	☐		<none>	☐			☐
11	✓	EBV11	Estimated Breeding Value 11	<none>	☐		<none>	☐			☐
12	✓	EBV12	Estimated Breeding Value 12	<none>	☐		<none>	☐			☐
13	✓	EBV13	Estimated Breeding Value 13	<none>	☐		<none>	☐			☐
14	✓	EBV14	Estimated Breeding Value 14	<none>	☐		<none>	☐			☐
15	✓	EBV15	Estimated Breeding Value 15	<none>	☐		<none>	☐			☐
16	✓	EBV16	Estimated Breeding Value 16	<none>	☐		<none>	☐			☐
17	✓	EBV17	Estimated Breeding Value 17	<none>	☐		<none>	☐			☐
18	✓	EBV18	Estimated Breeding Value 18	<none>	☐		<none>	☐			☐
19	✓	EBV19	Estimated Breeding Value 19	<none>	☐		<none>	☐			☐

[Use All] [Use None] **[Set Standard Lambplan]**   You can double-click on either the high- or
                                                        low-colour column to set/change the colour.

Trait Analysis System [▾] For "Sheep"

    Estimated Breeding Values
    Breeding Values
    Estimated Progeny Differences
    Australian Sheep Breeding Values
    Flock Breeding Values

[✓ Close]   [Low Colour] [Clear Colours]   [🖶 Print]

Note: you must select a minimum of one and a maximum of 19 ASBV's and at least one Breed Object and a maximum of 6

This completes the setup for Stud Sheep

5. Adding Animals

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 5.2 of this quick startguide.

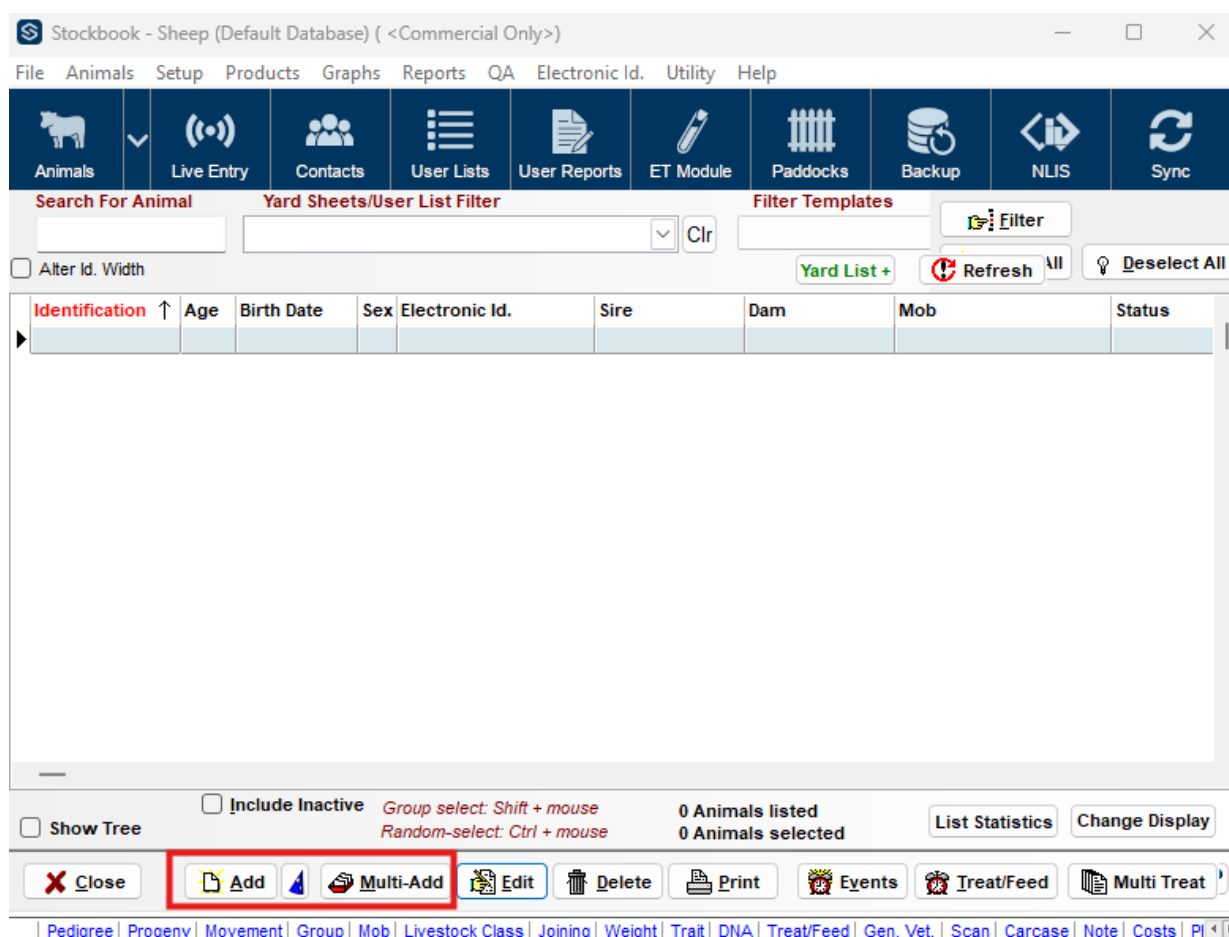We strongly advise taking a **backup** before adding animals. (see section 3.2.3)

5.1 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 5.1.1)
Option two – Use the **Add animal wizard** (see section 5.1.2)
Option three – Use **Multi-Add** (see section 5.1.3)

General information you need to know when entering animals:

- If you do not enter a Primary ID (Visual ID) Stockbook will generate one for the animal.
- If the dam and sire are not animals in Stockbook already they will not be able to be added in the animaldetails initially.

5.2   Add Button

The Add button allows you to enter as little or as much information as you require.

5.3   Add Animal Wizard

The add animal wizard steps out the process of adding an animal over a series of 4 screens.

5.4 Using the Multi-Add

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

## 5.5 Other 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.

The manual entry methods are a slower process of adding animals, so if any of the below apply to you please contact Outcross Systems support team or go onto our online knowledge base for more information.

Method of entry	Equipment Needed	Recommended for	Ease of use
Data Extraction from your Breed Society.	Data Extraction forms are available from Outcross 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.
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 connected to Stockbook.	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.	Moderate knowledge of Stockbook & the NLIS database.

5.6 Animal Types

Once your animals are entered into Stockbook they can be seen by clicking on the **Animals** icon.
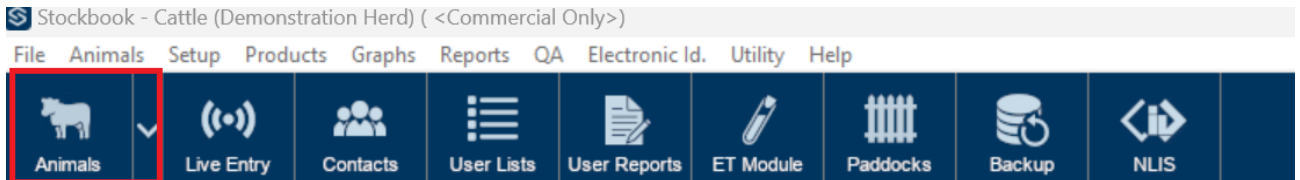
There are three types of animals in Stockbook. Current, Inactive and Archived.

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 database, lookup their history and include them in reports. These animals can be viewed by tickingthe **Include Inactive** box at the bottom of the main animal screen. Animals that areentered on the database for pedigree only purposes will also be marked as inactive animals.
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 anarchived 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.

Please contact the support team on 1800 799 107 for any further questions or access our online "Knowledge Base" on our website.

https://kb.outcrosssystems.com.au/portal/en/kb/stockbook