



Notes to Video Tutorial

Partner Exchange Tool – Tutorial #21

The Partner Exchange Tool (PET) enables data to be exchanged seamlessly between your local Cow Sense herd file and other industry partners such as Breed Associations, feedlots, Marketing Alliances and others. This tool allows you to submit data you've already entered in Cow Sense to be processed in a central database, and to retrieve returned data that will download directly to existing animal records in Cow Sense. The goal of the Partner Exchange Tool is to reduce the amount of duplicate data entry between Cow Sense and our partners as well as validating the data, ultimately saving you time and improving accuracy.

Please refer to the NxGen PET Interface Guides, located under the Help Menu > References, for detailed instructions on individual interfaces. These Guides are also available when initializing the "Run" function of the Partner Exchange Tool and selecting the "?" icon on the lower left of respective Step Screens.

Set Up

The first step in running the Partner Exchange Tool is to ensure that the latest version of Cow Sense NxGen is installed. From the Top Menu choose Help, then select "Check for Update" (an open internet connection is necessary). If there is an update to the software version detected you will be prompted to install update(s). If your version is current you will be notified of this as well.

Launch the Partner Exchange Tool from the Task Pane on the left by selecting **Tools>Partner>Setup**. Choose an interface template for a Breed Association or production partner. Note: Each interface template is unique, but you can use multiple interfaces on one herd file. As we progress with the migration of existing interfaces in Cow Sense Version 4 to our NxGen platform, the list of PET interfaces will continue to grow. As additional relationships are developed, those interfaces will be added as well and available as a free Update.

Turn On the desired interface template by checking the On/Off box next to it. Click "OK" and the PET tool will stamp the partner's interface on your herd and close.

Use

Start the Partner Exchange Tool from the NxGen Task Pane on the left by clicking **Tools>Partner>Run**. The Partner Exchange Tool Step 1 Window will open. Ensure the desired interface appears in the partnership field, or use the drop down arrow to select it. Click "Next" and Step 2 will prompt you to select the function you wish to perform. Please refer to the proper NxGen PET Guide to step you through additional set up and use processes unique to your particular exchange interface.

Once the template has been imposed, you will need to turn on the desired fields you wish to be displayed on the Individual animal form. From the Task Pane on the left choose **Options>Data Field Settings>Standard Fields**. Note the Partner's name now appears on this list of available fields to be displayed. Select the Partner fields you wish displayed. Refer to the "Getting Started Video Tutorial" for additional information on Data Field Settings.

After the Partner Exchange template has been imposed and the respective fields have been turned on for display, they will appear as a separate tab on the Individual Animal Form.



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The data fields displayed on the tab will be unique to each Partner's interface. Note: there may be fields for data on this tab that will be required for you to complete, and others that won't be populated until data is returned from the partner with whom you are exchanging data which will be shaded, indicating they can not be edited by the user.

The Partner Exchange fields may be viewed side-by-side with other desired fields in List View. Click Setup, and check all the fields that you would like to be displayed. Refer to the Animal List Tutorial for additional instruction for display of this data in the Animal List View.

As stated earlier, the Partner Exchange Tool performs a critical process of validating data to be extracted from your Cow Sense herd file and submit to the selected Partner. This validation process confirms that the data for the records you wish to submit meets all the requirements imposed by the respective Partner. If it is not, a message box will appear containing a log of missing entries that must be completed before the data file can be created and exported. The last few pages of each of the NxGen PET Interface Guides will detail the required fields and the data validation requirements.