



# Notes to Video Tutorial

## Maintenance Wizard, Promote and Replace – Tutorial #14

This tutorial discusses the addition or promotion of raised replacement heifers and bulls to the breeding herd via the Maintenance Wizard. The Maintenance Wizard is a powerful tool that can save valuable data entry time and makes updating herd records much easier for routine tasks. These tasks may include entering the results of pregnancy examination in our cattle herd or “Preg Check” (explained in previous tutorials), promoting replacement heifers and/or bulls and disposal of large groups of cows, bulls and their progeny (discussed in Tutorial 15). Although you can enter this information on the Individual Animal record from the Manage Menu, the Maintenance Wizard provides the ability to make mass data entries, making your task easier while improving accuracy.

The Maintenance Wizard is a member of the process functions in Cow Sense. Launch the Maintenance Wizard by clicking on **Manage>Process>Maintenance** from the Task Pane on the left. As you operate this tool you will not only have the opportunity to enter data, but also export data for further analysis and use in the field. These features provide you the information necessary to make the best decisions based on the factors important to your operation.

Clicking “Next” will bring up the Choose Task screen. Select an option in this screen, and the Wizard will set the respective screens with information and other choices relevant for the task you choose. This tutorial will focus on the Promotion of Replacement Females and Bulls. This video is the third in the series for the Maintenance Wizard, and additional tutorials cover the other functions available from this screen. Note: there is an option to choose “Replace Females” and one for “Replace Bulls”.

### Replace Females

The “Replace Females” option is discussed first. Select a record set with which you wish to work, either **All Records**-which would be ALL ACTIVE eligible females, or by specific **Calving Season**-which would be only ACTIVE eligible females born in that Calving Season. The “Date” column displays the calving season date. The “Count” column displays the number of Active eligible candidates from either All Records or within a specific Calving Season. The information displayed in the “Status” column represents the processing stage of the records within the calving season. Refer to the Compute Function Tutorial for information regarding updating the Status of a Calving Season.

As indicated before, the power of this tool is to make mass changes to data that are common to many animal records. Most operations that promote replacements from within their herd would do so from a group of cattle with similar ages. In this case, begin by choosing a specific calving season. When you click in the select box a check mark will appear. Click the ‘Next’ button at the bottom of the form.

The Optional Fields form is then displayed. As the name implies, this step allows select the fields from the list of Optional Fields to be displayed at time of documenting the promotion of Replacement Females or Bulls. The fields that appear here are driven by those that you have turned on in **Options > Data Field Settings** and have relevance to the promotion process. Although you can choose to display these additional fields, many are available for reference only and cannot be edited in this form. Comment fields are examples of fields that you **MAY** edit from the grid display. Be sure to consider which fields will be shown on your data sheet and your presets.

Buttons on the top of the page include the “All” button at the bottom left of the form (Turns all Optional Fields on for display), and the “None” button beside it (will un-mark the Include flag and prevent the display of any Optional Fields). The “Back” button moves you to the previous page, “Next” moves to the subsequent page, and “Exit” will close the Maintenance Wizard. To individually select from the Optional Fields you wish displayed from the list on the right click the “Include” box.

The next screen provides you the option of exporting a worksheet for use in the field when making replacement selections. This can also be used as reference or as a hardcopy to help with recording data for entry when you return to your computer. The Export options are available to select a set or subset of records to include in your Field Form for export to Excel (and optional printing). If you do not wish to create a Promotion or Replace Worksheet, proceed to the replacement selection grid by clicking “Next”. The Export options to the top right allow you to choose what records you wish to export. You can include: “Active” eligible records; records you have previously flagged as “Marked” with the marker flag, or “All” female records regardless of status.

To create and print the Promotion and Replace Female Field Form, click the “GO” button next to Export Worksheet. Select a location on your computer to save the form, give it a name for easy reference, and click “Open”. The form will open in your default application, usually Microsoft Excel as a .csv file. You can modify the layout of the field form, or add and modify columns as desired. Click the printer icon to send the field form to your default printer. Closing or minimizing the worksheet allows you to return to the Maintenance Wizard. If you do not have a Spreadsheet program such as Excel installed on your computer, you will not be able to open this form, but you may contact Cow Sense Customer Service for advice on low cost spreadsheet solutions available.

Click the “Next” button then click “Finish” to advance to the **Replace Female** selection grid to complete your data entry. If you do not wish to continue to the data entry screen at this time, you may click “Exit” instead of “Finish”. Clicking “Finish” will open the grid, which by default displays **active** eligible **candidate** females from within the selected Calving Season. Note the Standard Fields are included and displayed on this grid. The Optional Fields you may have chosen to include will appear as well.

The Count, or number of records, will appear at the top left of the screen. Moving to the right is a dropdown selection to allow you to filter the type of records you wish displayed including: Candidates, Done (completed records) and Marked (or previously flagged records). You can navigate to each animal record individually. Use the Promotion Type drop-down box next to each Candidate's record to update type data and promote to Breeding Cow or Replacement, depending upon the timing of when you promote the animal. Note, if you enter a value for Type, Replacement Date may be filled in AND Status Date is a required field that must be completed before the record can be saved and you can move to the next record. This is also true if you enter a Status Date, a value must be recorded in Promotion Type column. Notice in this case the current status is "Yearling", you may choose to promote to "Replacement" or "Breeding Cow" at this time. If you choose to update Status to Replacement, the female would be promoted from Replacement to Breeding Cow either at breeding or prior to Preg Check.

The **In Selection** shows what records you had chosen to work (such as all records versus a specific calving season). The **Check column** is a very important feature in the grid display. It can be extremely useful in repetitive data entry as well as changes individually by clicking "None" and manually checking individual records, or globally to ALL selected records. The Attach Note option is useful as well and the note detail will be recorded on all animals checked and recorded on their individual Notes record. When you select or "Check" individual records on this grid to add Preset data or a Note, it is different from changing the 'Marker' flag on a record or set of records. (For more information on use of the Marker flag review the Animal List Tutorial.) To update or record information for a single or a few records, you may choose the dropdown type of "Replacement" for each record individually, and type in the status date and replacement date. You may also type in the "VID as Calf". The VID as Calf Field is useful for operations that change visual IDs when the animal is promoted to the breeding herd.

The option to use **Presets** to apply global changes is a major benefit to this tool. Once records are checked you may use the Apply Presets button to record Replace Female preset values. As you may recall from prior video tutorials, Presets provide a mechanism for recording repetitive data for each record. General Preset fields (found in the **Task Pane, Options> Data Field Settings>Presets**) will contain the preset data for other fields from earlier work. Also, Presets allow you to add repetitive data applicable to all or many records at one time. On our Replace Female selection grid at the top right near Check, you can click "All" to select all records to Apply Presets globally, or click "None" to check records individually or globally for preset updates.

For preset data assignment, toggle "ON" or "OFF" after Presets to control preset values (in the header at the top left). Choose "ON" to use Presets, and fill in your preset data for Replace Type and Status Date in the top header. Then, select rows that you wish to update by clicking in the check box for each row to promote. Once rows are selected, click "Apply Presets" to assist with global changes. This will assign your **Preset Replace Type** and **Status Check Date** to all records checked. Click "OK" when a dialogue box opens stating that this will add data to records. The number of rows updated will be displayed. Note your data has been applied to all selected rows. Next, move to the column at left for Visual Tags and update the

visual tag to the new visual tags the replacement heifers are assigned (if it is your practice to change VID's at this time). Once determined that you have finished promoting the females to replacements, you may click the red 'X' in upper right hand to save the data and close the data entry grid.

## **Replace Bulls**

In the event you may decide to retain bull calves raised to the breeding herd, the process is much the same. From the Maintenance Wizard Task Screen, choose the "Replace Bull" option. As with the Replace Females function, you can either choose to work with All Active eligible candidates or from a specific calving season.

You will follow the same procedures as we discussed for promotion of replacement females. Click "Next" to continue and "Finish" to progress to the Replacement selection grid. Note the data entry grid is very similar to the Replace Female data entry grid. You would choose to update the data in the "Type" Field to Breeding Bull or Replacement, depending upon the timing of when you promote the animal. Once you have promoted the animals wished and finished updating records, click on upper right red X to save data and close the data entry grid. Then click "Exit" or close screen to return to Maintenance Wizard or another Task Option.