There are four main branches of this application:

Setup

Templates

Checklists

Flocks

**Setup**

This is where you can find all of the various information behind drop-down selections in addition to your user setup.

User Setup-> Users: This is where you will put in the user information. Users are automatically logged into the system using their Windows Login. You can then assign users to individual user groups to control which screens they can see and/or edit

User Setup-> User Groups: This is where you can add User Groups. These are types of users that will then allow you to mass edit who can see what

User Setup-> Portal Security: Currently disabled. Can be accessed for an individual screen by clicking on the Lock Icon in the upper right corner for an individual screen. This then allows you to select users/user groups who have access to the screen you just came from

Drop down Setup: All drop down setup has a display name, sort order, and active. Display name is what shows in the drop down. Sort order is the order in which it displays in the drop down. Active is whether or not it shows in the drop down. When you are no longer using an option in a drop down, you want to inactivate it. This will allow for historical data to be reported on, while disabling any future saving to select that option

Flock Info: These are the drop downs you find on the Flock screen

Location Info: Information about Layer Houses and Locations

Contact Info-> Role: This is where you put in names of Roles for different entities. Ex: Production Manager\*

Contact Info-> Contact: Anyone that needs to receive reminder alerts and/or should have contact information available to report on should be in this list\*

\*Contact Roles and Contacts are assigned to flocks and steps. More information later

Vaccine: Information about Vaccines. Instead of “Active” and “Inactive” you can instead assign a date range for vaccines to be available for selection. You can also select the vaccine that will replace the current vaccine once it is inactive (ex. Flu vaccine 123 is active 1/1/2016 – 12/31/2017. It is replaced by Flu vaccine 124 which is active 1/1/2017 – 12/31/2018). This functionality will be flushed out in more detail as we move forward in the reporting and data entry process

Attachment Type: Attachments can be “tagged” with a type for reporting purposes. Screen type determines which kinds of attachments can be tagged with this label- flock attachments or checklist attachments. So if it is Screen Type of Flock, you will only see that option in the drop down when uploading an attachment on the Flock screen, not when uploading a file to a checklist step.

**Checklist Templates**

You start by seeing a list of the different kinds of Checklists you have. For example, you may have a Main Checklist, an Organic Checklist, and a Free-Range Checklist. This is because different types of flocks may require a different set of steps.

Create New: To create a new checklist template, click the plus icon and enter a name

Change Checklist Template Names: Just edit the name and click the save button

Edit Existing Checklist: Click the Edit icon next to the checklist template name

Editing a checklist template takes you to the Checklist Template Detail screen. The name of the specific template you are in is displayed at the top.

Step Order: This is always numeric and sequential. To change the order, use the arrows in the right-most column

Adding a Step: Use the plus icon in the left-most column in the bottom row and it will create a step and forward you to the edit screen

Edit a Step:

Step Name- the name for the given step

Action Description- a brief summary of the action to be taken

Details- detailed instructions/description of the step

Default Status- what the status defaults to when the checklist is created

Step Scheduling:

The date for a has three options:

Date Based on Field- This is if the Date of Action should be based on the value stored on the Flock (example: Hatch Date). If this is selected, you can fill out three options. The first is a number, either positive or negative. The second is the date part- days/weeks/years. The third is the field from which you are calculating the date. For example, if the step is due 3 months before the hatch date, you would type -3, select Months, then select Hatch Date. Likewise, 3 weeks after the Old Out Date would be 3, Weeks, Old Out Date.

Date Based on Step- This is if the Date of Action should be based on the Date of Action for another step. If this is selected, you get basically the same three options: number of, days/weeks/etc, and Step Name. For example, you could say Step 3 happens 2 weeks after Step 2 by entering 2, Weeks, Step 2.

Manual Entry- select this if you don’t want a date to be automatically scheduled or updated, but manually entered for the checklist step.

As you work on this screen, use the save button to save your changes. *You should always save your changes before moving on to edit Step Attachments or Alert Schedules*

Step Attachment:

To add a new attachment, click the file icon next to the blank row. To change the description or type for an existing attachment, click the file icon next to an existing row.

When uploading a new file, you can enter the description, the type, and then click the paperclip icon to select a file. Once you have selected a file, you will see the Upload cloud icon. Click this icon to upload the file, close the popup, and refresh the screen. You will now see the new file on the list.

Files uploaded to this screen will be displayed at the top of a step when a user is viewing the step for a flock. More on this later.

Alert Schedule:

To edit an existing schedule- change the values and click save

To create a new schedule- select values and click save

To edit recipients for an existing schedule- **once you have saved,** click the button in the recipients column (it will either say “add” or will list the recipients for that step). This will bring up a popup. The popup automatically adds three blank records to the recipients list so you can add multiple at a time. For recipient type, select To/CC/BCC. To select the recipient, you should select *either* the Role *or* the contact. The Role will detect who is assigned to that given role for that flock and send the alert to them. Selecting a contact will just send the alert to that person directly. For example, if Preston is the Production Manager for Flock A, and Stacy is the Production Manager for Flock B, and you want the alert to go to Preston for Flock A but Stacy for Flock B, you would select Production Manager. But if you always want Frank to be CC’ed for that alert, you would select CC and Frank.

Click save to save the changes and add more, or click save and continue to save the recipients, close the popup, and refresh the page. You will now see the new recipients on the list.

**Flocks**

This will bring up a list of all flocks.

Create a new flock: Click the plus button. This will create a flock and forward you to the edit screen.

Edit existing: use the edit button in the left-most column

Editing a flock:

When you edit a flock, you will see all the available fields to input. Some fields are uneditable because they are calculated (ex: Hatch Date, Housing Date, Age at Housing, etc)

Contacts- To assign contacts to a flock, select the role and the person. This is primarily used for alerts.

Pullet Growers/Vaccines: Enter the information in the tabs

Flock Attachments: Similar to all attachment windows, you can upload any attachments for a flock in this tab. This should be any generic attachments that aren’t necessarily specific to a step in the process.

Flock Step Attachments: If any attachments are uploaded to a specific step for this flock, these attachments will be available here to view or edit.

**Flock Checklist (admin editable- from flock list screen):**

To *create* a checklist for a given flock, use the plus list icon next to the flock. It will give you a list of the different checklist templates- select the template you wish to create for a given flock and it will generate the full list for the flock. This process copies all the information from the templates and creates the checklist, so after created any changes to a template will not trickle down to an individual checklist and any changes to a checklist will not trickle up to the template.

To *edit* the Checklist for a given flock, use the link in the Flock Checklist column on the Flock List screen next to the flock you want to edit.

Editing a Flock’s Checklist:

These screens work very similar to the Checklist Template screens. You will find a link to the Flock screen at the top. To add, edit, or resort steps the buttons are all the same.

Editing a step:

Any template attachments are visible for download at the top of the screen. All editable properties can be found on the screen.

By default, calculation details are hidden. If you wish to change how the date is calculated, check the “Show Calculation Details” button and you will see how the Date of Action is calculated.

Status- when the status is marked as complete, the page will display Completed By and Completed Date for the User to fill out and save.

Step Attachments:

These are any documents that are related to this Flock and this Step. Once uploaded, they will also show on the Flock screen under the Flock Step Attachments tab.

Alert Schedule:

This is the same as for the template. Any changes made here will only apply to this specific checklist for this flock, so override changes can be made here.

Save to save changes and stay on the screen (should be done before editing attachments or alert recipients)

Save and Return to return to the full checklist

**Flock Checklist (operations- limited editing, from main menu or Flock List):**

The “Checklists” menu option takes you to the operational checklist list. This shows a list of all checklists, what flock they are for, and the next step name and Date of Action.

View button: This opens the full checklist, however the steps are read only. Click on a step name to drill into the details.

Step Details: The flock name (link) and step name are displayed at the top.

This screen contains all relevant data for the step. The description, Originator, Status, and Details are all available for editing. The user can also upload attachments. This screen does not allow for the step properties to be updated (such as scheduling, alerts, and Date of Action).

Status- when the status is marked as complete, the page will display Completed By and Completed Date for the User to fill out and save.

Save to save changes and stay on the screen (should be done before editing attachments or alert recipients)

Save and Return to return to the full checklist