

Client Resource

Getting Started



Introduction

The purpose of this tip sheet is to fast-track your learning experience with your new bioTrack Plus account and help you customize the program to maximize the value it can bring to your operation. This factsheet describes:

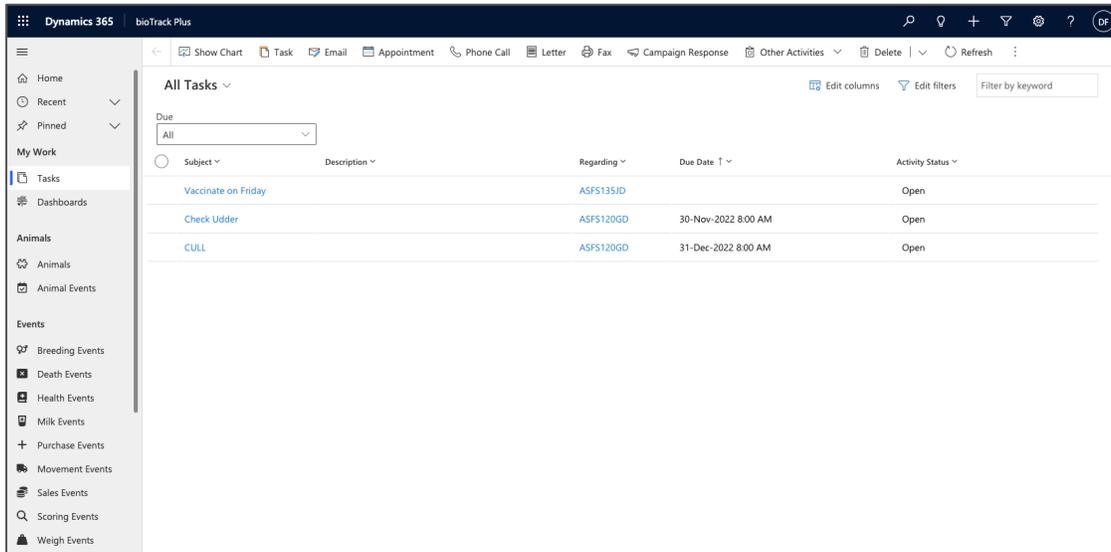
GETTING STARTED: GENERAL NAVIGATION AND SEARCH 1

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Logging In

Your welcome email will include a link to access the program and your login credentials. Use the link to navigate to the login screen and enter your credentials. During the login process, you have the option to setup 2-Factor Authentication. You can also ask the program to keep you signed in, which is recommended if you are using a personal device to prevent the program from logging you out due to inactivity.

Once you have successfully logged in, you will be brought to your Tasks view.



General Navigation

There are two ways of navigating in bioTrack Plus:

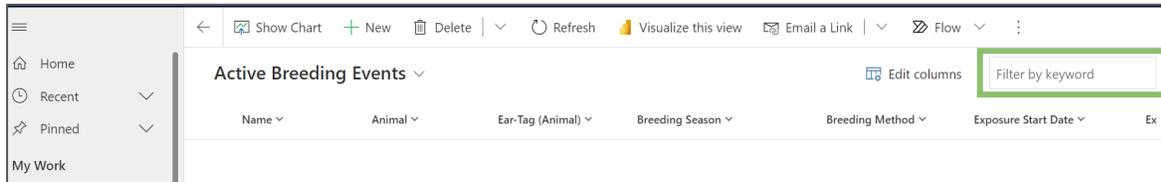
1. The **Left Navigation bar** is used to switch between screens in the program. It includes sections for the Animal and Events pages, as well as Master Data (e.g., Herd Letters, Locations, Groups, Products etc.)
2. The **Top Navigation Bar** allows you to perform actions (e.g., add a new record, export to Excel, view charts).

Pro Tip: Actions in the Top Navigation Bar apply to the screen you are currently on. So, for example, to add a New Animal, you first need to navigate to the Animals tab.

Global Search

On most pages there is a search field in the top right corner that says, '**Filter by Keyword**'.

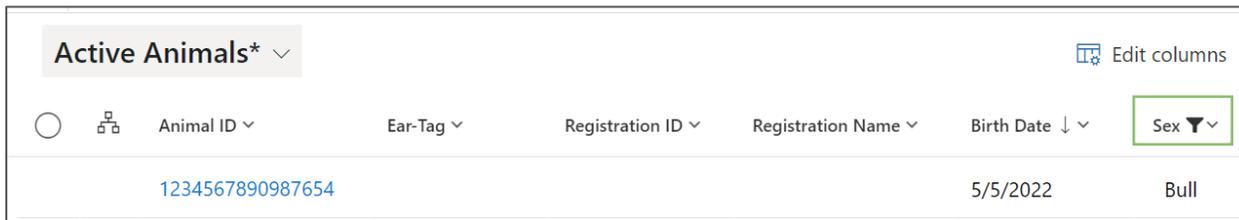
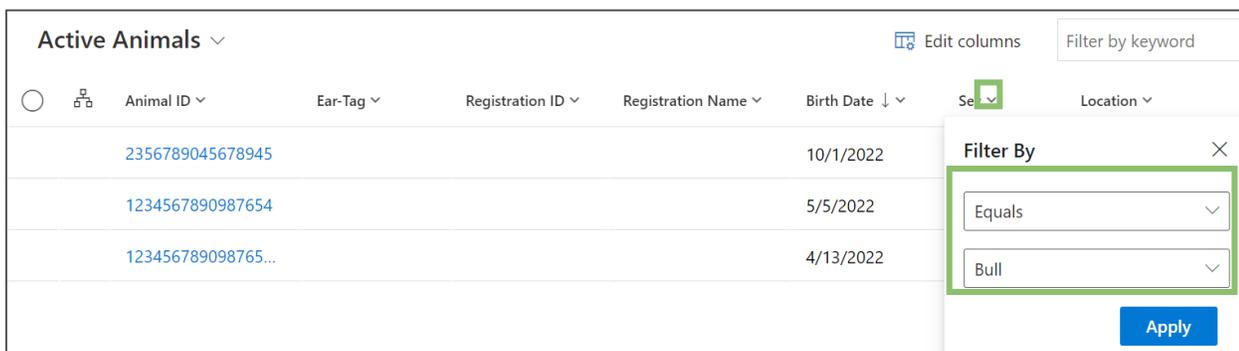
- This is a 'Global Search' that will search for any of the Animal ID fields that begin with this search term.
- If there is a space in the ID use a "*" (e.g., to find 'TST 1FD' you would search for 'TST*1F').
- If you only know the end of the ID you can use the wildcard "*" at the beginning (e.g., To find an RFID ending in 3245 you would search *3425).
- It will take a bit longer to search with a wildcard, so avoid this if possible.



Sorting and Filtering

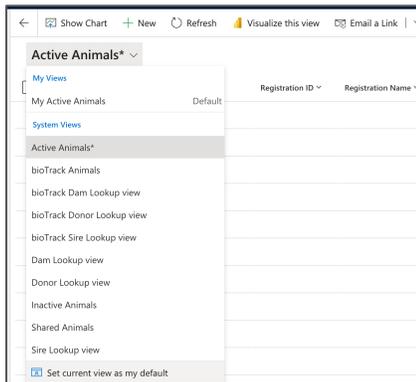
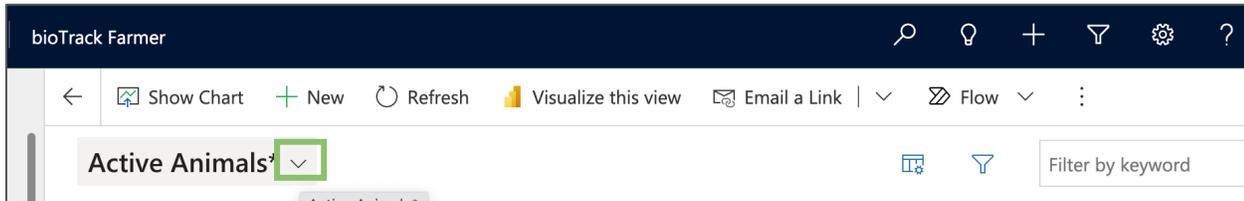
Another method to search is using the columns. Each column has a down arrow.

- Click the arrow and the options are sort A to Z, sort Z to A, and **'Filter By'**.
- Select **'Filter By'** and you will see various options depending on the type of data.
- Click apply to view results. You can see the Filter icon is **ON** for the selected column.
- To clear the filter, select the down arrow and click **'Clear Filter'**.



Switching Views

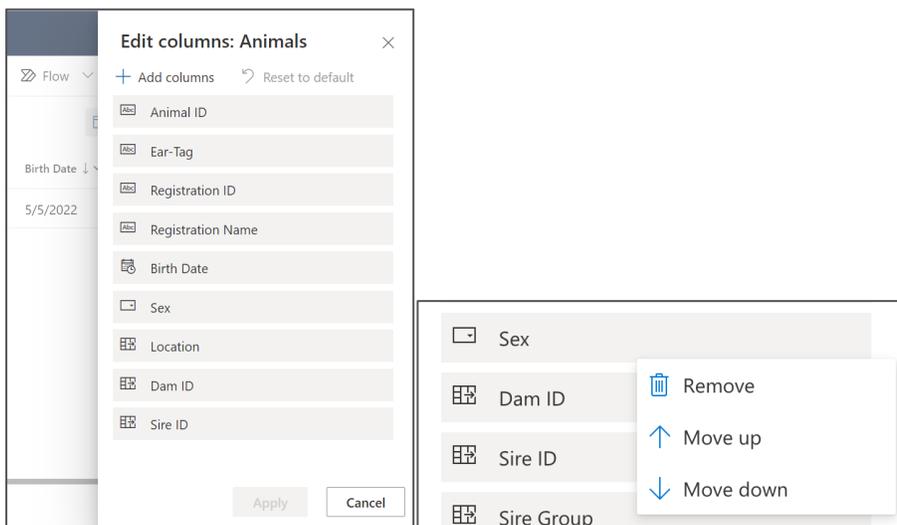
- Some of the screens of bioTrack+ have multiple 'Views' that allow you to see specific information on a subset of records.
- To switch between views, find the Title of the View and select the arrow beside it. This will give you a list of System and Custom views to allow you to select the view you want to use.



Customizing Views

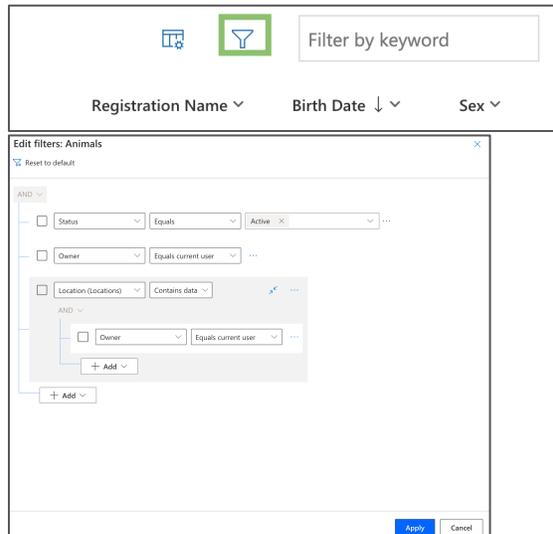
The ability to customize your personal Views is a very useful feature. This can be done on the Animals screen as well as any of the Event screens.

- To add or remove columns from your current view select '**Edit Columns**'.
- Select 'Add Columns' to add new columns to the view.
- To remove columns, hover over the right of the column and three dots should appear, select '**Remove**' from this sub-menu.
- You can also drag and drop to re-order the columns in the view.



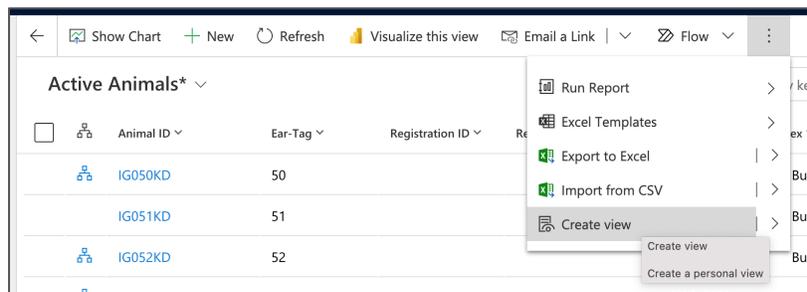
For more advanced filtering options, select the **'Filter'** button beside Edit Columns

- In the window that appears you can apply filters on multiple columns and criteria by building a custom query for the view.



When you are finished, you can save your custom view to be able to easily access it later.

- In the top navigation bar, select the three dots for more options, click the arrow beside **'Create View'** and then select **'Save as New View'**
- You will be asked to give the view a name describing what data the view includes (e.g., My Cows)
- To set this as your default view for a given screen, click the arrow beside the current view, find the view you want to select, and click **"Set Current View as My Default"**



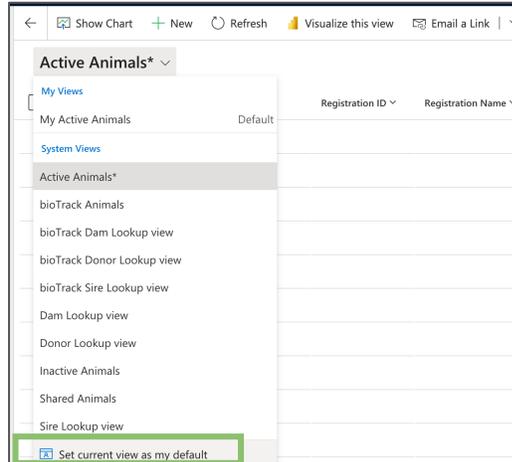


Chart Views

- Chart views give you another method of filtering data.
- Select 'Show Chart' from the top navigation bar.
- Depending on what screen you are viewing, there may be several options for the view.
- To change to a different chart, select the arrow next to the title of the view.
- You can hover over a data point on the chart to see more specific information.
- If you click a data point, the data table on the right will be filtered to only include animals in that group (e.g., On the Inventory by Location view, you could select to see only your 'Rams').
- The three dots next to the title give you the option to Expand the graph to make it easier to read and to Save the graph to your computer.

