

Client Resource

Creating Groups and Adding Animals



Introduction

The purpose of this tip sheet is to walk you through the steps of adding new groups to your bioTrack+ account. Groups are used to organize and manage several animals based on common life stage or management and are required to enter certain events in bioTrack Plus.

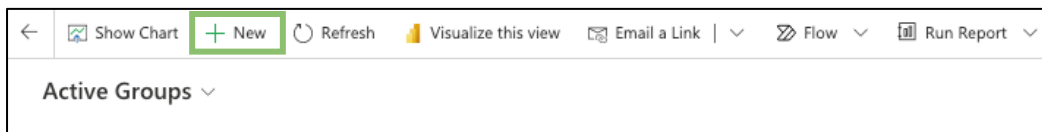
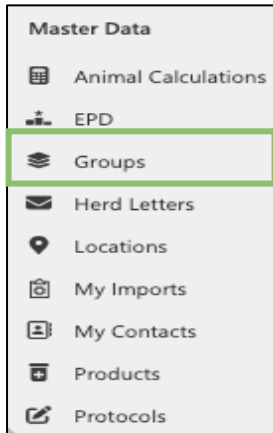
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Steps to Create a New Group

- Sign into your bioTrack+ Account.
- Using the left navigation menu, scroll down to the Master Data section, click **'Groups'**.
- This will bring you to a summary screen of any existing locations. Click **'New'**.
- A new page will appear to enter the details of your group.
 - Define a unique user group name (e.g., Fall Breedings)
 - Select the type of group (e.g., Breeding Group)
 - Select the parent group, if applicable (e.g., Breeding Group 1 within Fall Breedings)
 - Select the species for the group
 - Select the year of the group, if applicable (e.g., 2023)
 - Define the start and end dates for the group. This is used for data validation in some cases. For example, if a newborn animal's birthday is not within the date range for the birth season it is assigned this will trigger an error.

- Save the group and a grid will appear that you can use to view all animals that are currently in the group, as well as add existing or new animals to the group.
- You can also import groups if you have multiple to create at one time.
 - Ensure you are on the Groups tab before trying to import new groups.



New Group

General

User Group Name *	---	Group Year	---
Group Type *	---	Start Date *	---
Parent Group	---	End Date *	---
Species *	---		

User Group Name vs Group Name

It's important to note the difference between **User Group Names**, which are the names you assign your group and **Group Names**, which are the system's method of ensuring the group name is unique by adding the account's username to the User Group Name. For example, if Jane Farmer creates a group called "Fall 2022 Breedings" as the User Group Name. When the group is saved, the system will append the user's name to create a Group Name of "Fall 2022 Breedings – Jane Farmer". This is especially important when importing records, as if you do not Look up to the column matching how your group is formatted in the import file all of the records will fail to import.

Types of Groups

Group Type	Description
Animal Scan Group	Group of animals with ultrasound measurements at the same time.
Animal Test Group	Bull of heifer evaluation group.
Birth Management Group	Group of newborn animals that were managed under similar conditions (e.g., same pen, diet etc.) within a birth season. You must define a specific birth season as the parent group for each birth management group. The birth management group is particularly important for producers wishing to receive sheep genetic evaluations, where it is a required field.
Birth Season Group	Group of animals born at the same time. It is recommended that animals born more than 90 days apart are divided into separate birth season groups.
Breeding Group	A group of females bred to the same sire or multi-sire group at the same period of time.
Custom Group	Custom groups allow you flexibility in managing animals together for your own system. They can be defined for any task where animals are managed the same.
Feedlot Group	A group of animals entering a feedlot at the same time.
Health Group	A group of animals that were treated or had preventative veterinary care at the same time.
Multi-Sire Group	A group of breeding sires that are used for group mating. It is recommended that you name the group based on the IDs of the sires if you will have multiple multi-sire groups at once so it's easy to tell what group a progeny came from. Once you create the multi-sire group, you can add sires to the group and then use that group as the "Sire Group" when adding or importing new animals. See the tip sheet on Multi-Sired Animals for more information.
System Created Group	Groups that are triggered to create automatically by the system.
Weaning Group	Animals from the same birth management group that are weaned at the same time.
Weaning Management Group	This group is defined by the system to ensure animals are within a certain range of ages for the purposes of genetic evaluations so that comparisons are fair.
Weighing Group	A group of animals weighed at the same time.
Yearling Group	Animals from the same birth management group that have yearling weights at the same time.
Yearling Management Group	This group is defined by the system to ensure animals are within a certain range of ages for the purposes of genetic evaluations so that comparisons are fair.

Adding Animals to Groups

Once your groups have been created, you can then add animals to the group. Depending on the type of group, you may either add an animal to the group from the groups page, animal profile or when creating an event. To add a group from the groups page:

- Click on the link to go to the form for the group you want to add animals to
- Below the information about the group, you will see a grid displaying any existing animals that are in the group.
- Select **'New Animals'** to add an animal to a group that is not yet in the system. This will pull up a window where you can create the animal and then when the animal is saved it will be added to the group.
- Select **'Add Existing Animals'** to add an animal that is already in the system to the group.
 - This will bring up a panel where you can type an ID to search for the animal to add. You can search by Bio ID, RFID or Ear-Tag. If you do not see the animal you want to add, select 'Advanced Search' to look for the animal in a different view.
 - When you have selected the animal, click **'Add'** to add the animal to the group
 - Finally, refresh the group to ensure the animal has been properly added.

Groups may also be added from the animal profile (birth season, birth management group, sire group) or a specific event (e.g., health, breeding, weight).

The screenshot shows the 'Mar-21' group page. At the top, it says 'Mar-21 Group' and '- Saved'. Below this are tabs for 'General' and 'Related'. The 'General' tab is active, showing a table of group details:

User Group Name	Mar-21	Group Year	2021
Group Type	Birth Season Group	Start Date	1/1/2021
Parent Group	---	End Date	12/31/2021
Species	Goat		

Below the table, there is a section for 'Birth Season Animals'. At the bottom right of the page, there are three buttons: '+ New Animals', 'Add Existing Animals' (highlighted with a green box), and 'Refresh'.

The 'Lookup Records' dialog box is shown. It has a title bar with a close button (X). Below the title, it says 'Select record'. There is a search input field with the placeholder text 'Look for records' and a magnifying glass icon. Below the search field, it says 'Type to search or press Enter to browse'. At the bottom left, there is a '+ New Record' button.