# Overview

## *What Is It?*

*Heavy Horses* is a computer program used to register and track the ownership of horses. *Heavy Horses* was originally developed for the Clydesdale Breeders of United States (thus its name), to facilitate printing a comprehensive stud book. While *Heavy Horses* accomplishes this task with ease, providing camera ready reports for both comprehensive and annual stud books, it has developed into a complete horse association management tool, capable of tracking both horse and membership information. *Heavy Horses* also has a companion product, *Heavy Horses - Personal Edition*, which is an 'electronic stud book' that you can make available to your membership. *Heavy Horses - Personal Edition* provides all the search capabilities, and a sub-set of the reporting capabilities of *Heavy Horses*, all available to members their own home PCs.

*While Heavy Horses was developed originally for the horse community, there is no reason it can't be used for other animals. Contact us and we'll change the name for you.*

## *Technical Information*

*Heavy Horses* is a Windows based program written using Powersoft's Powerbuilder development tool. Minimum requirements to run the system are a Pentium bases PC with 64mb RAM and Microsoft Windows 98 or better; you will need at least 20 Mb of free disk space. All information is stored in an ODBC compliant database, so you can use any ODBC compliant database or report writer to access your information and produce custom reports.

# Definitions

### *Horses*

*Heavy Horses* tracks a multitude of information about your horses. This information can be broken into two types: attributes and lists. Each horse has the following attributes : record identification number, sequence number, display number, breed, country, color, sex, gelded, gelding date, breeding date and type of cover, birth date, deceased date, name, description, sire, dam, breeder, registration date and status, registry, studbook volume and section, blood type case number, parents verified, and stem or generation number. In addition, you can define up to nine additional attributes which are specific to your association. Each horse has four lists associated with it: owners, breeding records, inspection records, and notes. Each horse is also linked to each of it's offspring so that progeny lists and family trees can be generated.

### *Owners*

Owners own one or more animals. An owner has an identification number, name, farm name, and address. In addition, a owner can be linked to a membership record; doing this causes all address changes on the membership record to be reflected on the ownership record also.

### *Members*

Member records contain the same information as ownership record, along with several additional fields. These fields are membership type, status, registered name, member since date, renewal date, and last date renewed. Membership records are kept separate from ownership records so that name changes can be made to the membership record without affecting how any horses are registered.

### *Queues*

Queues are a way of maintaining ad-hoc lists of both horses and members. You could set up a queue to contain all board members, and then each time you needed labels to send out a mailing to only board members, you could print labels from this queue.

# How To Use *Heavy Horses*

## Starting the program

It is assumed that the user has experience using computers and Microsoft Windows;  if you do not, then your homework before installing this program is to buy a good word processing program (Microsoft Works or Word), or some other Windows based program to teach you the basics of  using a mouse and working with Windows (if all else fails, spend several hours playing Windows Solitaire program, at least you'll have your mousing down!).

To start using *Heavy Horses* after it has been installed, get into Windows and double-click on the *Heavy Horses* icon. A small information window will appear and then the main window will fill the screen.  You will see the main menu along the top of the window, and below that an a icon bar containing four icons.

## The Main Menu

The main menu has five options.  Whenever you open a new screen, that screen's menu will overlay the main menu (in Windows lingo, this is a *Multiple Document Interface*).  No matter which menu is currently displayed, there will always be a *File* option, and a *Help* option.  Main menu options are as follows.

***File*** — System related items.  Printer Set up is used to choose which printer to send reports to, while Exit does just that, exits the program.

***Owners*** — Owner and member related items:  creating and modifying owners and members, transaction entry, and queue maintenance.

***Horses*** — Horse related items:  creating and modifying horses, progeny lists, family trees, and queue maintenance.

***Set up*** — Programs used in first setting up the program for use: definitions, breeds, countries, colors, etc.

***Help*** — Getting help on how to use the program.

## Standard Conventions

As you use Heavy Horses, you will find that the program uses a common interface to manipulate both horses, owners, and members.  In general, you first choose what to work on by using a *Lookup Window*.  Once you have chosen

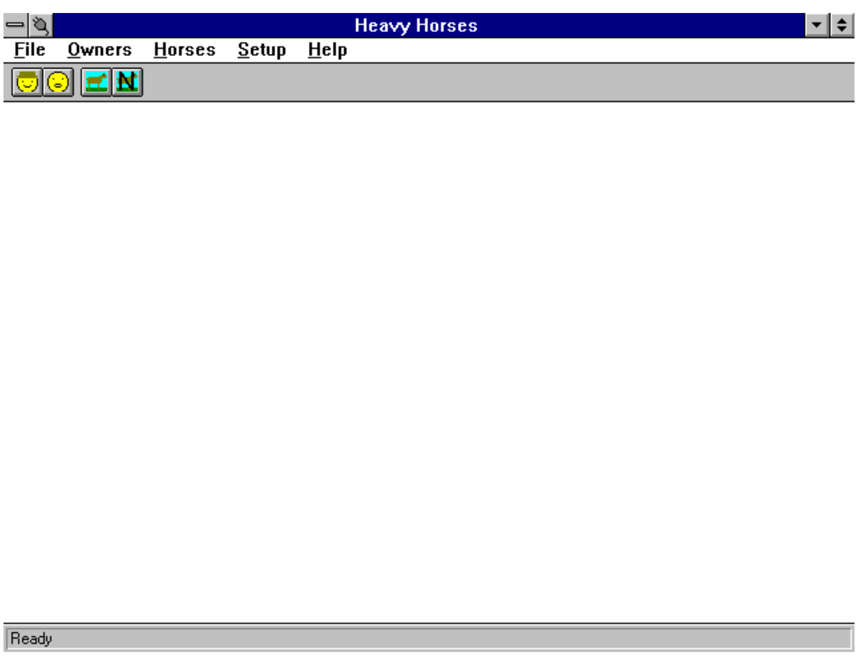


*Figure 1 :  The Heavy Horses Main Window*

something to work on, information for this object is displayed using a *View/Lookup Window*. If you wish to change a piece of information, you will use a *Dialog Window* to make the changes. When you print a report, you use the *Selection Window* to choose what to print.

## Finding a Horse or Owner using a Lookup Window

To view an owner or horse, click on the appropriate menu item, or press the appropriate icon (which icon to use will be explained later). This will open a *Lookup Window*. A lookup window contains two areas: a place to enter an identification code or name, and a scrolling list window where you can use the mouse to choose the item you are looking for. You can enter as much information as you know about a horse or owner, and click on the **Choose** button. If there is more than one record matching your selection, you can choose the appropriate record from the lookup list by clicking on it with the mouse, and clicking on **Choose.** Double clicking on a record or choosing a record and pressing the Enter key have the same effect as clicking on **Choose**. If there is only one record matching your criteria, you will be automatically taken to that record.

*A note on finding horses:*

*When you lookup a horse, there are three criteria you can use to find it - its **Horse ID** number, its **Name**, and its **Display Number**. The horse ID number is a unique number that is assigned to each horse; depending on your association's numbering scheme, this number may or may NOT be the horse's registration number.* If you *do not know the horse's ID number, you can lookup the horse either by name, or by putting the horses registration number in the display number field.*

## View / Lookup Windows

Once you have chosen a horse, owner, or member, you use a *View / Lookup* window to view horse and owner information. The View / Lookup window has two parts. The upper part of the window gives you information about the horse or owner. You can control what is displayed in the bottom part of the window. You can display the horse's description, progeny, family tree, etc. You can also use the bottom part of the window as an easy way to get to other information. When you view a horse's progeny or owners, one line will be highlighted. This means that you can double click on any one of the records displayed in the bottom part of the window, and that record's view screen will be brought up. If you were looking at progeny, you would be able to double click on one of the horse's foals, and that foal's View Horse screen would be displayed.

## Dialog Windows

Dialog windows are used for data entry; these usually have an area where you can enter some information and then accept the information by pressing the **OK** or **Done** button. Most dialog windows also have a **Cancel** button, which will allow you to painlessly undo any grief you have created. A variation on the dialog window is the *Tabbed Dialog Window*. With a tabbed window, there will be several tabs at the top of the window. By clicking on different tabs, you can view different pages of information.

## Selecting Records for Reports

When you print general purpose reports, you use the *Selection Screen* to choose what to print. This screen has three tabs. The first tab is the *Identification* tab. The contents of this tab depend on which report is being printed. The identification tab is used by some reports to enter a description of the report that is about to be printed; it is also used by others to specify what to print.

The second tab is the *Selection* tab. The selection tab is used to specify the criteria with which to select records to print. For example, say you want to print a list of gray horses. To do this you would click on the selection tab and then click on the **Add** button to add a line. The selection table has three columns. The first column is the field that you wish to select by. In our example, you would drop down the list and choose 'Color.' The second column specifies the type of operation to perform; this is also a dropdown list. Examples of operators would be 'Equal To,' 'Not Equal To,' 'Greater Than,' etc. In our example, we want all gray horses in the registry, so we would click on 'Equal To'. The last column is the actual criteria by which we are selecting. In our example, we want all gray horses, so we would enter the word Gray. Our final row would read 'Color Equal To Gray.'

The third tab is the *Order* tab. This tab can be used to specify in what order the records will be sorted. In our above example, if we wanted all gray horses listed by birth date, we would click on the Order tab, then click on **Add** to add a line. The order table has two columns. The first column specifies the field by which to sort; this is a dropdown list. In our example, we would choose 'Birth Date'. The second column determines if records are to be sorted in ascending or descending order. In our example, if we specified Ascending , we would get a list of all gray horses, oldest to youngest. If we specified descending, we would get a list of all gray horses, youngest to oldest.

# Getting Ready

### *Definitions*

The definitions screen is used to set up defaults for the program, and to enter simple code and description lists...

### *Registration Status Codes*

Choose *Setup/Registration Codes* to set up registration status codes. Registration status codes control whether a horse can be printed in the stud books, and if foals of this horse are allowed to be registered. Examples of registration status codes would be: Not Registered, Foreign Registered, Grade, Registered, etc. You can set up a default registration status code for each *Breed* and *Country* that you set up. The fields for this table are as follows :

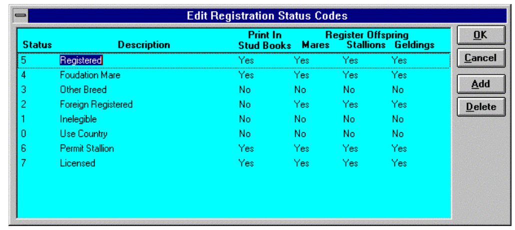


*Figure 2 : The Registration Status Code Entry Screen*

**Code** Unique code to define this registration status code.

**Description** Description of the code.

**Print in Studbooks :** Choose yes if you would like horses with this registration status code to be printed in stud/mare books.

**Allow Registration of Mares :** Choose yes if mares produced by horses with this code are eligible to be registered.

**Allow Registration of Stallions :** Choose yes if stallions produced by horses with this code are eligible to be registered.

**Allow Registration of Geldings :** Choose yes if geldings produced by horses with this code are eligible to be registered.

### *Breeds*

Choose *Setup/Breeds* to set up the different breeds you register. The fields are as follows :

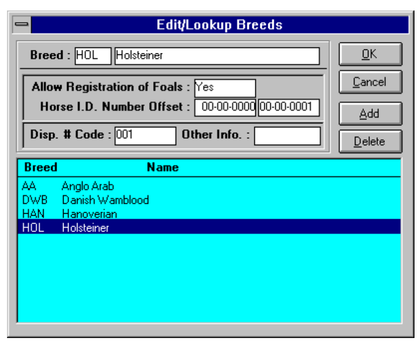


*Figure 3 : The Breed Entry Screen*

**Breed** The code to identify this breed.

**Description** Description of the breed.

**Default Registration Code** : Choose the registration status code from the dropdown that you would like to use as the default for this breed. If you would like the registration status code to be defined by the country the horse is being registered in, the choose the code 'Use Country Code'.

**Horse ID # Offset :** These two fields define a range of numbers which are to be used to identify horses of this breed.

**Disp. # Code** This code can be used by the routine to calculate the default display number for horses of this breed.

**Other Info.** As the name implies, use this field to add any other information you need to track.

## *Countries*

Choose *Setup/Countries* to set up the different countries for which you will be entering horses. The fields are as follows :

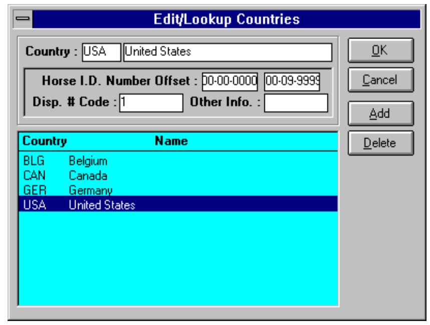


*Figure 4 : The Country Entry Screen*

**Country** The code to identify this country.

**Name** Name of the country.

**Horse ID # Offset :** These two fields define a range of numbers which are to be used to identify horses from a given country. When you enter a new horse, this number plus the breed offset number will be added together, and the first available number after this number will be defaulted as the horses ID number.

**Disp. # Code** This code can be used by the routine to calculate the default display number for horses of this breed.

**Other Info.** As the name implies, use this field to add any other pertinent information.

## *Colors*

Choose *Setup/Colors* to define the different colors that you use to register horses. These should be the ‘base’ colors you use (i.e., chestnut, brown, black, etc.). The color is used primarily for selecting horses on reports, a complete description of the horse’s color should be given in the description.

## *Inspection Types*

Choose *Setup/Inspection Types* to define the different type of inspections that your registry performs. Inspections are used by registries which use a approvals system to decide which horses can be accepted into the registry. Another use of inspection records would be to track detailed information on bloodtyping. A inspection definition record defines a inspection code, description, and the meaning of the nine attributes that make up a inspection.

## *Breeding Types*

Choose *Setup/Breeding Types* to set up the different ways you wish to track how foals are conceived. Examples would be Live Cover, Artificial Insemination, Embryo Transplant, etc. This is a simple lookup list with a code and description.

## *Membership Types*

Choose *Setup/Membership Types* to set up codes to track different members. Examples would be Life, Annual, Junior, etc. This is a simple lookup list with a code and description.

# Horses

## *Creating a New Horse*

To create a new horse, either choose *Horses/New Horse* from the main menu, or click the fourth icon. You can also choose *Horses/Horse* and then press **New** from the lookup window. Doing either will bring up the New Horse dialog. This dialog box uses two tabs, or pages. You can change which page you are viewing by clicking on the tab on the upper left of the page. The first page has 'identity' information, while the second page has registration and user information. Fill these pages in as follows.

**Page One**

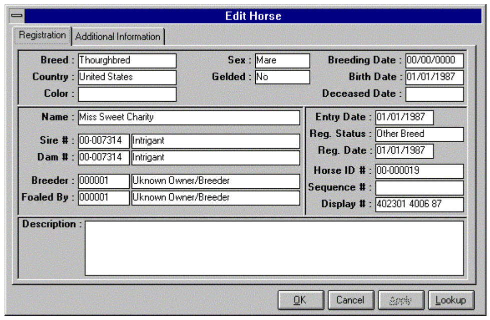


*Figure 5 : The Horse Entry Screen*

***Breed*** If you register multiple breeds of horses, or if you register horses of mixed breeds, you can define different breeds and specify the breed of each horse.

***Country*** Choose the country this horse is registered in. This is a drop down list.

***Color*** The primary color of the horse. This is a drop down list of the colors that you entered through *Setup/Colors*.

***Sex*** Enter the sex of the animal: Mare, Stallion, or Gelding. This is a drop down list box, so you can press on the arrow to drop down a list, or you can press 'M' for mare, 'S' for stallion, or 'G' for gelding.

*You can only register a horse as a gelding when it is first created. Registering a horse as a gelding simply sets the Gelding flag to Yes, and sets the Gelding date to the birth date of the animal. Read on.*

***Gelding*** If this is a stallion that has been gelded, then enter Yes for gelded, and enter the date of gelding. If this horse was gelded at birth or you do not know the gelding date, it is safest to enter the horses birth date as the gelded date. If you entered the sex of this horse as a gelding, then Gelded will be set to Yes and the birth date will be defaulted as the gelded date.

***Breeding Date*** Enter the date on which this horse was conceived.

***Birth Date*** Enter the date the horse was foaled.

***Deceased Date*** You can only change this field if you have already recorded the death of this horse.

***Name*** Enter the name as you would like it to appear on the registration certificate. The computer will automatically scan for all horses that have a similar name. If the computer finds any horses, it will display a window listing all the horses; you can either ignore this warning and hit **Proceed**, or you can press **Halt** to stop and figure out what to do.

*If you have a lot of horses, this search may take a couple of seconds. If this is a problem, or you are not worried about duplicate names, this feature can be turned off.*

***Sire and Dam*** Enter the horse identification numbers of this horse's sire and dam. If you do not know their horse numbers, you can press the **Lookup** button to get a list of all stallions (Sire) or all mares (Dam). If the horse is not in the system, you can press **New** from the Lookup Horse window to create a new horse.

*Instead of pressing **Lookup** and then pressing **Find** to find a horse by name, you can enter the first couple of letters of the horse's name into the sire or dam field, and then press **Lookup**. If there is only one horse that starts with those letters, the number will be put into the sire or dam field. If there are several horses that start with those letters, the Lookup Horse window will be displayed. If there are no horses that start with those letters, you will be asked if you would like to create a new horse; answer **Yes** to create, or **No** to return to the Enter New Horse screen.*

***Breeder and Foaled By*** : Enter the owner number of the breeder and, if different, the person who foaled the horse. As with entering the sire and dam, you can lookup and create owners by pressing **Lookup**. If you have entered in a breeding date, the *breeder* will be defaulted based on who owned the dam at the time of breeding; the *foaled by* will be defaulted based on who owned the dam at the time of birth.

*You can only enter breeder and foaled by information on this screen when you are creating a new horse. To modify the breeder or owner of a existing horse, choose Horse/Modify Owner/Breeder from the horse menu.*

***Entry Date*** This is the date that this horse was entered into the system; it will default to today's date.

***Registration Status Code*** : Choose this horse's current registration status code from the drop down list. This list is based on the status codes you defined in Set up/Registration Codes. This status code defines whether offspring of this horse can be registered, and if the information for this horse should be printed in the stud books.

***Registration Date*** : Enter the registration date of the horse; it will default to today's date. The registration date controls what annual stud book this horse will appear in. If the entry date and registration date are the same, then the registration date will be automatically changed if the entry date is changed.

***Horse ID #*** The horse ID number uniquely identifies this horse; it can be up to nine digits long. The computer will automatically fill in the next available number, based on the breed and country of registration; you can change the default number. If you choose a number that is already in use, the computer will tell you and won't let you proceed until you enter a unused number.

***Sequence #*** Assignment of the sequence number is dependent on your registry's numbering system. In a registry in which all horses are numbered sequentially, the sequence number will be equal to the horse ID number. For registries that assign sequence numbers dependent on the year or registration or the sex of the animal, this number will be assigned based on those criteria.

***Display Number*** The display number is what will be printed on reports, it is equivalent to your registration number. While the identification number must be numeric, the display number can have any combination of numbers and letters. If this is a ancestor horse that comes from a country that uses a numbering system different from your default numbering system, you can change the display number.

***Description*** You can enter as much information in the description field as you want. Be sure that the description you enter will fit in the space allotted on the registration certificate.

**Page Two**

***Registry*** You can setup several different registries for your association, and classify horses and print stud books according to registry. An example of this would be associations which maintain a separate registry for purebred and mixed breed animals.

***Studbook Section*** : Specify the section of the studbook where this horse should appear.

***Studbook Volume*** : Specify the studbook volume this horse appears in. This field is for information only; studbooks are printed based on registration dates.

***Lineage or Stem*** For registries which trace there horses back to a set of foundation stallions or mares, you can specify the foundation stallion or mare code here.

***How Conceived*** Choose how this horse was conceived from the drop down list. This list is based on the breeding types you defined in *Setup/Breeding* Types.

***DNA/Blood Type*** : If your association use DNA or blood typing, you can use the field to record the case number of the DNA or blood typing test. If you would like to record more information than the case number, you can set up an inspection record with the information you require.

***Parents Verified*** : You can record if the parentage of this horse has been fully, partially, or not verified.

***User-defined Codes*** : When your system was set up, you could define as many as nine attributes, or user-defined fields, to enter with each horse. An attribute would be the place to enter a stallion license number, lease number, or any other information that you want to associate with a horse.

## *Viewing an Existing Horse*

To view or modify an existing horse, choose *Horses/Horse* from the main menu, or click on the Horse icon (the third icon). This will bring up the Lookup Horse window. Choose the horse you want to view.

*See* ***How to Find a Horse or Owner*** *for an explanation of how to use the Lookup Horse window.*

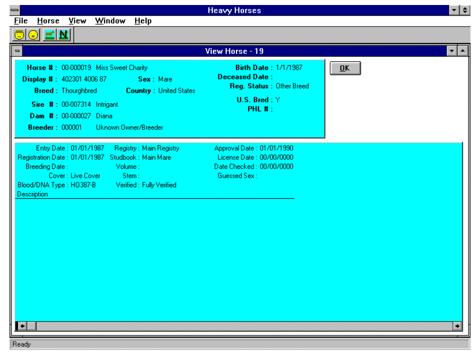


*Figure 6 : The Horse View Screen*

### View Options

***Description*** This displays the description of the horse. This is the default view when you pull up a horse.

***Owners*** This displays all owners who have owned this horse. The owner number and name, effective dates, and ownership type are displayed. You can scroll to the right to view any comments. Double clicking on an owner will bring up that owner.

***Progeny*** This displays all offspring of this horse. Double clicking on a horse will bring up that horse.

***Progeny Outline*** This opens a *Progeny Outline* window for this horse, allowing you to see in outline mode all descendants of this horse.

*The Progeny Outline is explained in more detail later in this manual.*

***Family Tree*** This displays a family tree for this horse to three generations back.

***Family Tree Outline*** This opens a *Family Tree Outline* window for this horse, allowing you to see in outline mode all ancestors of this horse.

*The Family Tree Outline is explained in more detail later in this manual.*

***Inspections*** This displays all inspections entered for this horse.

***Breeding Records*** : This displays all breeding records entered for this horse.

***Memos*** This displays any memos that have been entered for this horse.

***Dam*** This displays this horse's dam's View Horse screen.

***Dam's Progeny*** This displays any brothers or sisters from this horse's mother's side. Double clicking on a horse will bring that horse up.

***Sire*** This displays this horse's sire's View Horse screen.

***Sire's Progeny*** This displays any brothers or sisters from this horse's father's side. Double clicking on a horse will bring that horse up.

***Breeder*** This displays this horses breeder's View Owner screen.

## *Modifying an Existing Horse*

Choose *Horse/Modify* to make changes to a existing horse. This will bring up the Modify Horse dialog. Refer to *New Horses* for a complete description of each field. Changing the birth date, death, or entry dates will automatically update the horse's ownership records.

## *Changing a Horse's Identification Number*

Choose *Horse/Change Horse Number* to change the ID number assigned to a horse. Enter the new horse number and press **OK**; this will change all the links to the owner records and the occurrences where this horse is the sire or dam of another horse. You will need to manually change the horse's display number if it has also changed.

## *Recording the Horse's Death*

Choose *Horse/Record Death* from the View Horse screen to record the death of a horse. Before you record the death of an animal you should verify that all transfers for the horse have been recorded; you can not record a transfer after the animal's death has been recorded.   You will be asked for the date of death and the date the you wish the death recorded;  this date is like the registration date, and controls what annual book the death is recorded in.

### *Adding Horse Memos*

Choose *Horse/Edit Memos* from the View Horse screen to add to or change the memos attached to this horse.  This will bring up the *Edit Horse Memos* dialog box.

### *Inspection Records*

If your registry does inspections before it registers a horse or as a system for rating horses, you can record this information using inspection records.  An inspection record contains inspection code, date, location, and nine user-defined inspection attributes.  Each horse can have multiple inspection records, but the inspection type and date must be unique for the horse.   The fields are as follows :

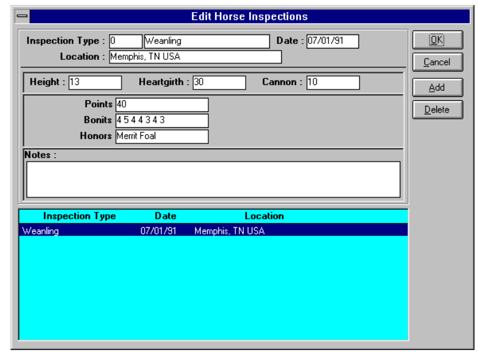


*Figure 7 : Entering Horse Inspection Records*

***Inspection Code*** The inspection code that defines this inspection record.  Examples could be Weanling, Foal, Two Year Old, Stallion, Mare, etc. You define inspection codes using *Set up/Inspection Types* from the main menu.

***Date*** The date the inspection took place.

***Location*** The location  (city, state, farm, etc.) where the inspection took place.

***User-defined Fields*** :  Each inspection code defines what the nine user-defined fields stand for.  Enter the information according to this definition.

***Comment*** A freeform comment in which you can add any additional information you need.

### *Breeding Records*

Breeding records are used to record the date and type of breeding for a horse.  This gives you a record of all the times a horse has been bred, even if a foal was not produced.  You can enter in breeding records from a stallion service report, and then use the breeding record as the basis for a new horse when you receive a live foal report.  Fields for the breeding records are as follows :

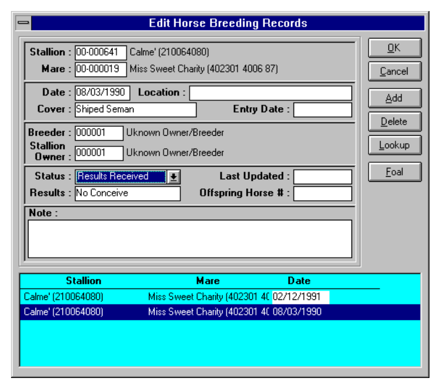


*Figure 8 : Entering Horse Breeding Records*

***Stallion*** The horse ID number of the stallion.

***Mare*** The horse ID number of the mare.

***Date*** The date the breeding took place.

***Location*** The location where the breeding took place - city, state, farm, etc.

***Breeder*** The owner number of the person who owned the mare at the time of breeding.  If this person is not in the owner database, you can either leave this field blank and put the information in the comments, or add the owner.

***Stallion Owner*** The owner number of the person who owned the stallion at the time of breeding. If this person is not in the owner database, you can either leave this field blank and put the information in the comments, or add the owner.

***Status*** Status of this record : Unknown, Owner Notified, Foal not Produced, Foal Produced.

***Results*** Was a foal produced from this breeding? You define the codes for this field in system definitions.

***Offspring Horse #*** :  The horse ID number of the foal produced.

***Comment*** A freeform comment in which you can add any additional information you need.

When a foal is produced and you have a breeding record entered, you can create the new horse from the breeding record. Choose the breeding record that produced the foal, and click on the Foal button. This will open the new horse window, with all the information from the breeding record already entered.

## *Transferring Ownership of a Horse*

### Transfers and Ownership Records

A transfer is a change of ownership of a horse. Each owner of a horse has an ownership record. An ownership record shows the owner of the horse and the dates ownership, as well as the date the record was created. Each ownership record also has a sequence number; this number is equivalent to who is the first owner, second owner, etc. The only exception to this is if a breeder bred a mare and then sold her before she foaled. Even though this owner never actually owned the foal, he would have an ownership record for the foal, recorded as sequence number zero, with its ownership dates, both starting and ending, set to the birth date of the foal.

### Types of Transfers

Transfers are broken down into six categories - regular transfers, exports, imports, re-entries, foreign transfers, and leases. The type of transfer determines which list the transfer is printed on in the annual book. Re-entries and foreign transfers are recorded in the Re-Entry list, while transfers, exports, and leases are recorded in the Transfer list. Imports are only recorded in the horse's Pedigree listing.

### Transferring a Horse

To transfer a horse, choose *Horse/Transfer* from the View Horse menu. This will bring up the Transfer Horse dialog.

***New Owner*** Enter the owner number of the new owner. If you do not know the owner's number, you can press **Lookup** to get a list; you can also enter a partial name into the owner number field and press **Lookup** to do a quick lookup. If the owner does not exist, you can press **New** from the lookup window to create a new owner.

***Effective Date*** This is the date the horse was transferred.

***Reference #*** This is a reference number so that you can cross-reference to a numbered paper transfer.

***Transfer Type*** This is the type of transfer: Transfer, Import, Export, Re-Entry, Foreign Transfer, or Lease. This is a dropdown list.

***Entry Date*** This is the date the transfer is recorded in the system. It controls which annual book the transfer is printed in.

***Historical Entry*** If this is an old transfer entered for historical purpose, but you do not wish to appear in the annual book, click on Historical Entry.

***Comment*** This is a freeform comment in which you can put any information you wish.

### Modifying the Breeder, Register, or Transfers

Choose *Horse/Edit Breeders - Owners* to bring up the Modify Breeder/Owner dialog. This dialog tells who the

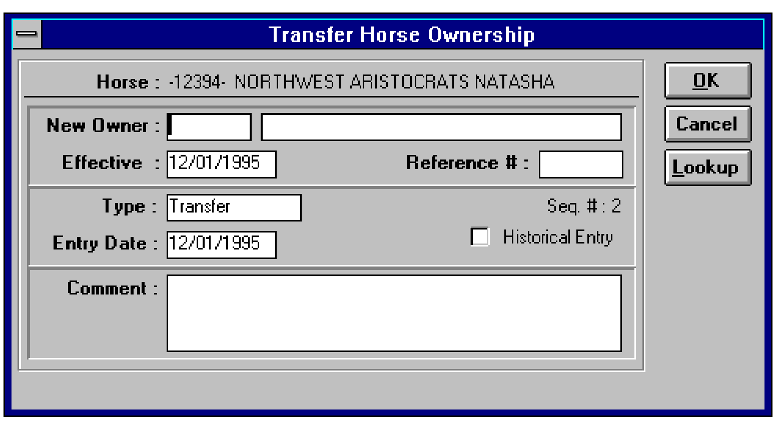


*Figure 9 : The Transfer Horse Dialog*

breeder and owner are, and displays a list of all the transfers that have occurred for this animal.  There are five options you can take.

### *Modifying Breeder/First Owner*

To modify the breeder or registrant of this animal, click on **Breeder/Owner**.  This brings up a dialog box that will allow you to enter the new breeder and/or registered owners code.  As usual, you can press **Lookup** to get a list, or enter the first few characters of the name and press **Lookup** to do a quick lookup.  You can press **OK** to save changes, or **Cancel** to abandon any changes.

### *Adding a New Transfer*

Choose **New Transfer** to enter a new transfer.  Refer to *Transferring a Horse* for details.

### *Modifying an Existing Transfer*

To modify an existing transfer, first choose that transfer in the transfer list, and then click on **Change Transfer** to modify it;   this brings up the Modify Transfer dialog.  Refer to *Transferring a Horse* for details.  When you have finished, sequence numbers and ownership dates will be recalculated based on the changes.

### *Deleting a Transfer*

To delete an existing transfer, first choose that transfer from the transfer list, and then click on **Delete Transfer** to delete it;  you will be asked to confirm the deletion. Sequence numbers and ownership dates will automatically be recalculated based on the changes.

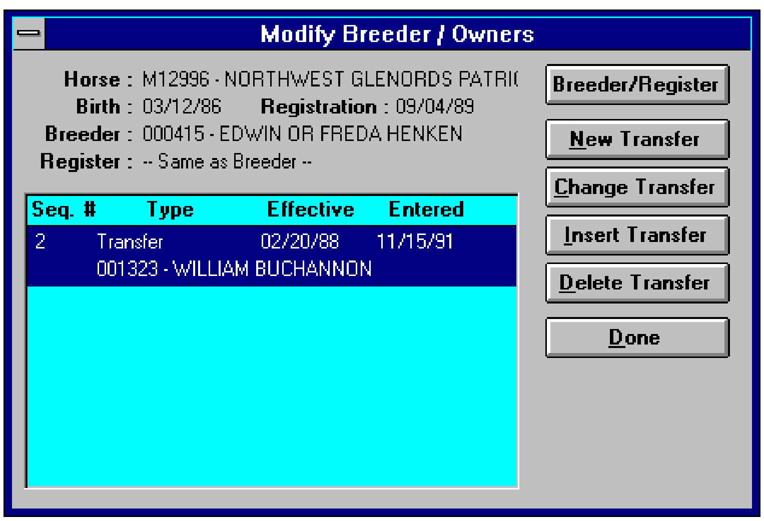


*Figure 10 :  The Edit Breeders - Owners Dialog*

### *Inserting a Transfer*

If you have forgotten to enter a transfer, choose the transfer following the new transfer, and press **Insert Transfer**; this will bring up the *Modify Transfer* dialog.  Refer to *Transferring a Horse* for details.  When you have finished, the sequence numbers and ownership dates will be recalculated based on the changes.

## *Printing a Horse's Record*

### Registration Certificate

Choose *Horse/Print Certificate* to print a registration certificate for this horse.  The certificate will first be shown on the screen, where you can review it.  Once you are ready to print it, choose *File/Print.*

### Horse Information

Choose *File/Reports/Print Horse* to print a report detailing all that is known about this horse. You can choose to print the horses family tree, progeny, breeding records, inspection records, and owners.

### Five Generation Pedigree

Choose *File/Reports/5 Gen. Pedigree* to print a five generation family tree for this horses.

## *Printing a List of Horses*

### Simple List

To print a simple list of horses, choose *File/Report/Horse/Horse List* from the main menu. You can specify what criteria to print. This report gives each horse's horse number, display number, name, date of birth, color, sire and dam in a columnar list format.

### Pedigree List

To print a much prettier list of horses (one that you would send to members), choose *File/Report/Horse/Horse Pedigree List* from the main menu. You can specify what criteria to print. This report provides the same information as the Pedigree report that is printed for the annual and comprehensive books.

### Generation List

Choose *File/Report/Horse/Generation List* for a listing of all stallions and their sires to four generations back.

### Breeding Records

Choose *File/Report/Horses/Breeding Records* for a listing of breeding records.

### Inspection Records

Choose *File/Report/Horse/Inspection Records* for a listing of inspection records.

## *Horse Progeny Outline*

The Progeny Outline provides a way to view and print all descendants of a horse; it can be accessed by choosing *Horses/Progeny Outline* from the main menu, or choosing *View/Progeny Outline* while viewing a horse.

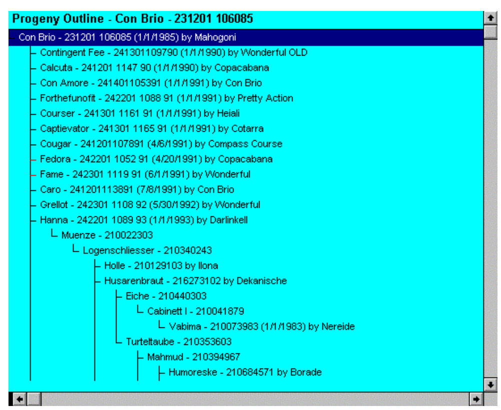


*Figure 11 : An Example of the Horse Progeny List*

When you first open a Progeny Outline, you will be asked if you want to build the outline. Answering yes will cause the whole outline to be built (this can take a considerable amount of time). If you do not have the program automatically build the outline, you must build it manually. You do this by clicking on the horse in which you are interested (in the beginning there will be only one), and clicking on *View/Expand* in the menu; this will show all the offspring of the selected horse. You can choose *View/Expand Branch* to expand a whole branch of the progeny outline; this would show all offspring of this horse, and all offspring of this horse's offspring. Any horse may be highlighted and either double clicked or click on *View/Goto* to display that horse's information.

## *Horse Family Tree Outline*

The Family Tree Outline provides you with a way to view and print all the ancestors of a horse; it operates in exactly the same manner as the *Progeny Outline*, except that it goes back in time, while the *Progeny Outline* goes forward in time.

# Owners

## *Creating a New Owner*

To create a new Owner, either choose *Owner/Owner* from the main menu, or click the first icon, the happy owner wearing a hat. This brings up the Lookup Owners/Members window, and you can press **New**; this opens the New Owner dialog. Like the Edit Horse dialog box, this dialog uses three tabs, or pages. You can change which page you are viewing by clicking on the tab on the upper left of the page. The first page has ‘identity’ information, while the second page has membership and user-defined information. Fill these pages as follows.

***Owner Code*** The first thing a new owner needs is an owner code. The owner code uniquely identifies this owner. The computer will automatically fill in the next available number. You can change this number, but if it is already in use, the computer will tell you and won’t let you proceed until you enter an unused number.

***Name*** Enter the name as you would like it to appear on the pedigree.

***Search Name*** The search name is generally the last name of the owner; it is used to help find owners and to order owners in the Owners and Breeders Index. The computer will automatically take the last word in the name and enter it as the search name; in the event of multiple word last names (St. John) or businesses (Anheuser Busch Inc.), the computer will be wrong and you will have to change this.

***Farm Name*** If this owner uses a farm name, and wishes this farm name to be printed on the pedigree, enter it here.

***Address*** Enter the owner’s city, state, zip code, and country.

***Client Type*** The type of this record - Owner or Member; this will default to owner.

***Member Code*** If you would like to link this owner to a membership record, you can enter the membership code here. By doing this you are able to view membership information on this owner’s membership page.

## *View an Existing Owner*

To view or modify an existing owner, choose *Owners/Owner* from the main menu, or click on the Owner icon (the first icon). This will bring up the Lookup Owners window. Choose the owner you want to view.

*See How to Find a Horse or Owner for an explanation of how to use the Lookup Owners window.*

***Horses Owned*** Choose *View/Horses Owned* to get a list of all horses that this owner has ever owned. Choose *View/Currently Owned* to get a list of all horses that this owner currently owns. *Choose View/Bred, Not Owned* to get a list of all horses for which this owner owned and bred the mother, but sold the mare before the foal was born. You can double click on any of these lists to get a particular horse’s View Horse screen.

***Payments*** Choose *View/Payments* to display a list of all the money that this owner has paid.

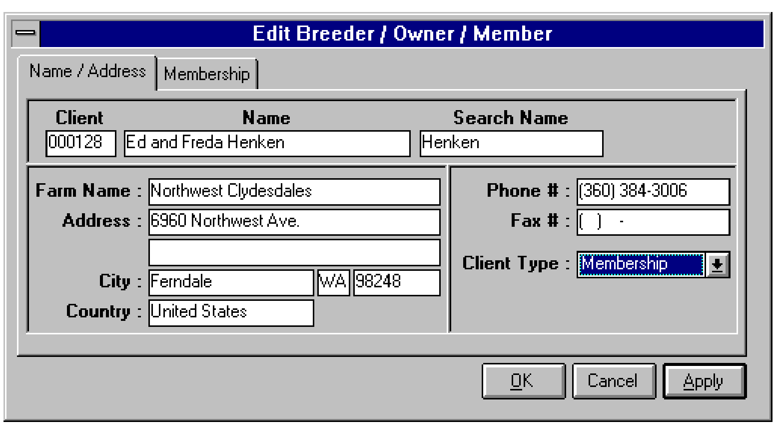


*Figure 12 : The New Owner Dialog*

## *Modify an Owner*

Choose *Owner/Modify* to change an owner’s name and address. This will bring up the Owner/Member Modify dialog. This dialog contains information for both owners and members, you should only change the name, search name, city, state, zip, or country. You should be aware that changing the owner's name will change what will be printed on the pedigrees of all horses that this owner owns; unless you are correcting a mistake, you probably will not want to do this.

### *Printing a Owner*

Choose *File/Print Owner* to see a report detailing this owner's information and a list of all the horses he has ever owned or bred. Choose *File/Print* to send this report to the printer.

## Members

Members differ from owners in that they have membership information and six user-defined fields. Member records are used for producing membership lists and for printing mailing labels. You add/view/modify member records the same way you enter owner records, except that you use *Owners/Members* from the main menu, or press on the grumpy bald member icon (the second icon).

#### *Adding / Modifying Members*

You add and modify members the same way you add and modify owners. In addition to the name and address information you put in for owners, you can also enter additional membership and user-defined information on the second page of the Edit Owners/Members Dialog box. These fields are as follows.


*Figure 13 : The Edit Owners / Members dialog showing the membership page.*

***Membership Status*** : Select this member's current status from the drop down list. Possible choices are: Active, Expired, Deceased, and Non-member.

***Membership Type*** : You can define several different membership types. Examples would be Junior, Life, Full, etc. You can use the membership type for mailing lists, etc.

***Member Since*** Records the date that this member joined the association.

***Renewal Date*** This is the date that this members needs to renew their membership.

***Date Last Renewed*** : This is the date that this member last renewed their membership.

***User-defined Fields*** : You can enter up to six user-defined fields for each member.

### *Membership Lists*

#### Membership List

Choose *File/Reports/Members/Membership List* from the main menu to print a membership list; you can use the selection system to choose which members to print. There are three different formats of lists to choose from: list of names, list of names and addresses, and three across list of names and addresses.

#### Mailing Labels

Choose *File/Reports/Members/Mailing Labels* from the main menu to print mailing labels; you can use the selection system to choose which members to print. You can use the label definitions screen to define the layout of your labels.

# Queues

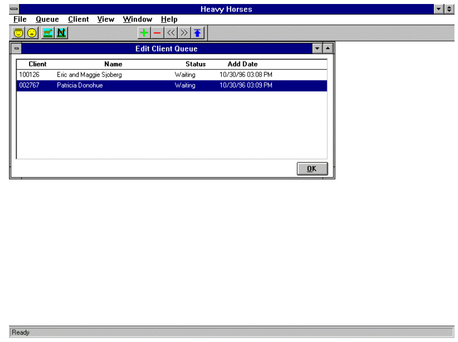


*Figure 14 : The Queue View Screen*

Queues are ad-hoc lists of either horses or clients. You can use queues to keep track of anything that you would normally keep as a manual list. Examples would be all horses waiting for blood typing results, members who are board members or committee members, or non-members who pay for association publications but are not full members. You can print a list of all horses or members on a queue, and for client queues, you can print mailing labels for all persons on the queue.

The first step in using a queue is to define the different queues that will be used; this is done using the system definitions screen. To set up a client queue, choose Clients as the definition category, and Queues as the subject. To set up a horse queue, choose Horse as the definition category, and Queues as the subject. A queue definition takes a queue number and a description.

### Using Queues

To begin using a queue, choose *Client/Queues* or *Horse/Queue* from the main menu. A lookup window of all available queues will be displayed; choose the queue you would like to use. Once you have chosen a queue to work with, the current contents of that queue will be displayed. You can do the following with queues :

- Add clients or horses to the queue.
- Remove clients or horses from the queue.
- Create a new client or horse and add them to the queue.
- Choose a client or horse from the queue to modify.
- Print a list of all clients or horses in the queue.

### Adding Clients or Horses to a Queue

To add a existing client or horse to the queue, choose *Queue/Add* from the queue menu. This will bring up the client or horse lookup window; choose the client or horse you would like to add.

### Removing Clients or Horses from a Queue

To remove a client or horse, select the client or horse and choose Queue/Delete. You will be prompted to confirm the deletion.

# Stud Books

## Difference between Annual and Comprehensive Stud Books

*Heavy Horses* can print two types of stud books;  a *comprehensive* book and an *annual* book.  The comprehensive book prints all horses that have been entered into the system.  This is a book that you would put out every five to ten years, or as demanded.  The annual book is a book that you would put out each year, as an update to the comprehensive book.  The annual book would only contain information entered into the system during the previous year (or since the last comprehensive or annual book was printed).

### *How does the Annual Book know what to print?*

The annual book prints its information based on entry dates.  When you enter a new horse, you enter a Registration Date; when you enter a transfer, you enter an Entry Date; when you enter a death, you enter an Entry Date.  The annual book takes a range of dates, and prints horses that were entered or registered between these dates.  It is very important to have all of one year's work done before you start the next year's, so that you have a specific starting date for the next year's book.  If you need to go back and add or change information for the previous year, be sure to change all registration and entry dates to fall before the year-end cutoff.

## The Reports

To print annual book reports, choose *File/Reports/Annual Book* from the main menu. To print comprehensive book reports, choose *File/Reports/Stud Book* from the main menu.  You can then pick the specific report that you want to print.

These reports all need a date range, country, start page, and heading.  The date range specifies what to print by *entry* or *registration* date.  For the comprehensive book reports, these dates will default to the start of time the end of time.  The country determines which country's horses will be printed;  this will default to the default country. The starting page specifies the first page number to print on the report;  if you are doing a book, you would start with the pedigrees at page one, the transfer list as the last page number of the pedigrees plus one, etc.  The heading is what will print at the top of each page.

It should be noted that these reports can take some time to compile, especially the pedigree report for the comprehensive book.  It is suggested that for this report, you start the report before leaving (or going to bed).  You should be able to print the report in the morning.

### *Pedigrees (Annual/Comprehensive)*

The pedigrees list all animals registered during the year, sorted by horse number.  Each pedigree is split into three sections - horse number / name, description and a list of  owners. The description of the horse includes the date of birth of the horse, along with the horses sire and dam.  If the dam was serviced and subsequently sold before foaling, the list of owners will show both the breeder of and registrant of the animal.

### *Transfer and Re-Entries Lists (Annual Only)*

The transfers and re-entries are actually two separate lists, each sequenced by horse number.  The transfer list shows all transfers, leases, and exports entered during the year.  The re-entries list shows all horses that were exported from the association and later imported back into the association;  all transfers which took place while the horse was out of

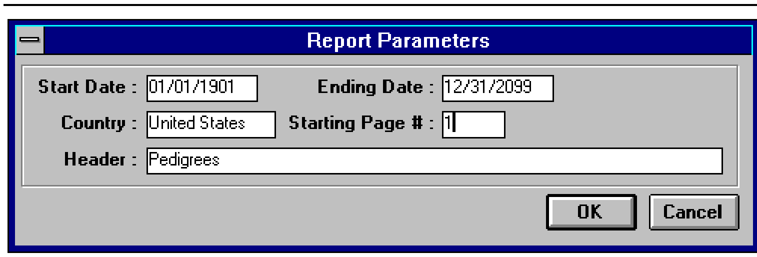


*Figure 15 :  The Stud Book Reports Parameters Dialog*

the country are noted in the re-entry list.

### *Horse Index - Mares / Stallions and Geldings (Annual/Comprehensive)*

The index of animals is separated into mares and stallions/geldings, each sorted alphabetically by name. A horse appears in this list if it appears in the pedigree, transfers/re-entries, or deceased animals lists.

### *Owners and Breeders Index (Annual/Comprehensive)*

The owners and breeders index is sorted by the owner's name. It lists all horses that this owner was involved with during the year, whether a registration, re-entry, death, or as the buyer or seller in a transfer.

### *Progeny of Dam / Get of Sire (Annual/Comprehensive)*

The progeny lists show each animal and all progeny for the animal.

### *Deceased Animals (Annual Only)*

This is a list of all animals that were reported as dying during the year.

### *Registered Names (Annual/Comprehensive)*

This is a list of all registered names sorted alphabetically by both the prefix and by the owner of the prefix.