HerdView®

USER GUIDE

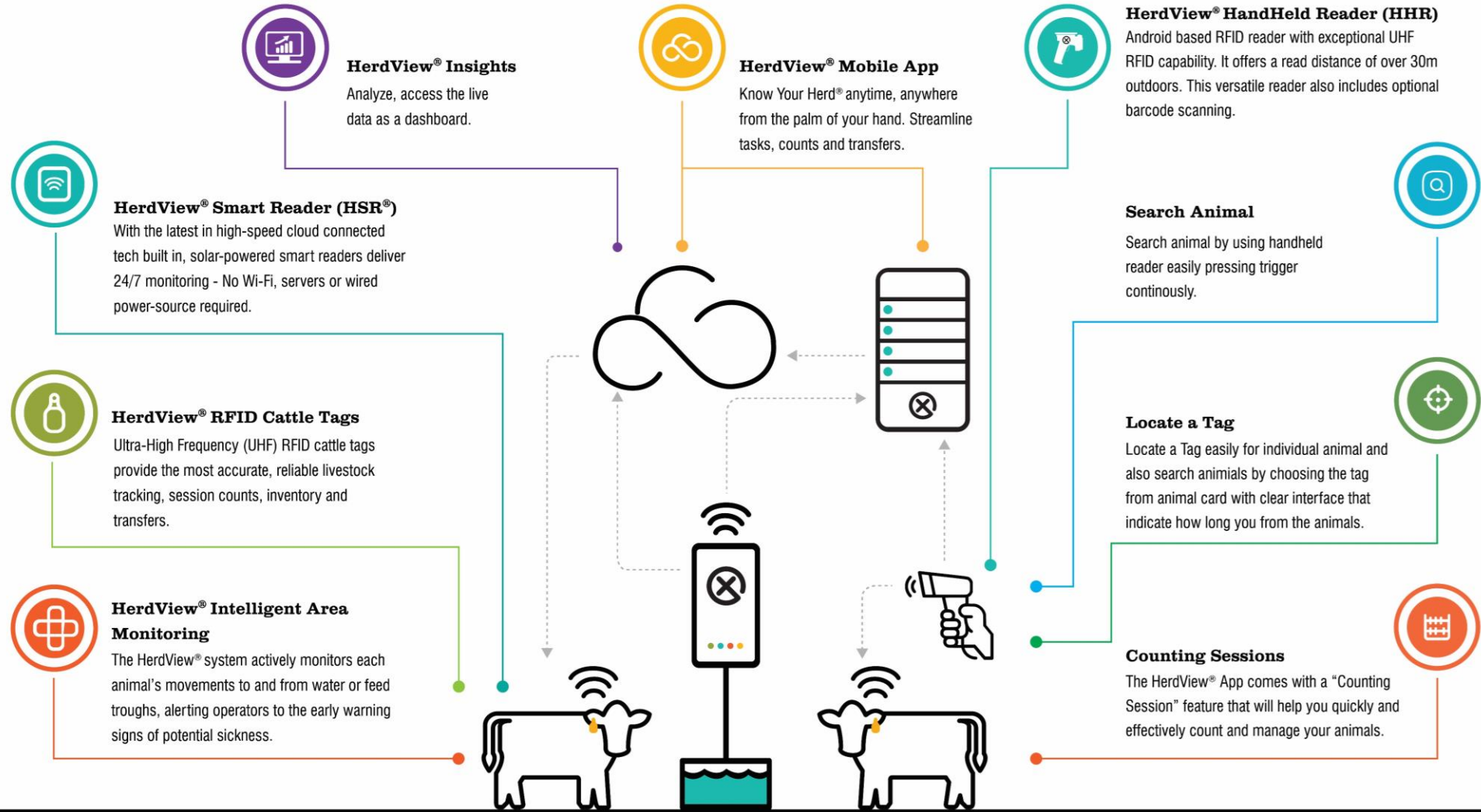# TABLE OF CONTENT

(833) 437-3987
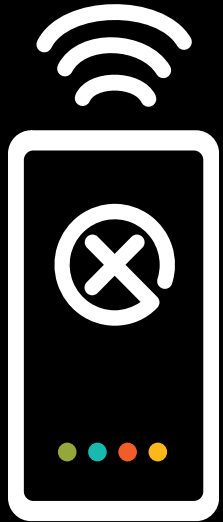
support@herdx.com

INTRODUCTION

What is HerdView®?

The only intelligent livestock management solution engineered to monitor animal health & improve your bottom line. HerdView® is Like Putting an Extra Set of Eyes on Your Cattle 24/7.

- Know When Animals Aren't Coming to Water
- Pinpoint Potential At-Risk Animals Early
- Keep Track of Inventory
- Take Accurate Counts and Track Transfers
- Streamline Operations, Increase Profits
- Know Your Herd® Anytime, Anywhere

We are so pleased that you have chosen our HerdView® system to provide you our advanced technology solution that will help you improve your company's operation and increase profits. Below you will find an overview of the HerdView® livestock management solution and some additional information on each of the components of the HerdView® systems that harnesses the most advanced high-speed tracking, tags, and mobile technology to help you Know Your Herd®.

HerdView® Insights

Analyze, access the live data as a dashboard.

HerdView® Mobile App

Know Your Herd® anytime, anywhere from the palm of your hand. Streamline tasks, counts and transfers.

HerdView® HandHeld Reader (HHR)

Android based RFID reader with exceptional UHF RFID capability. It offers a read distance of over 30m outdoors. This versatile reader also includes optional barcode scanning.

HerdView® Smart Reader (HSR®)

With the latest in high-speed cloud connected tech built in, solar-powered smart readers deliver 24/7 monitoring - No Wi-Fi, servers or wired power-source required.

Search Animal

Search animal by using handheld reader easily pressing trigger continously.

**HerdView® RFID Cattle Tags**

Ultra-High Frequency (UHF) RFID cattle tags provide the most accurate, reliable livestock tracking, session counts, inventory and transfers.

Locate a Tag

Locate a Tag easily for individual animal and also search animals by choosing the tag from animal card with clear interface that indicate how long you from the animals.

HerdView® Intelligent Area Monitoring

The HerdView® system actively monitors each animal's movements to and from water or feed troughs, alerting operators to the early warning signs of potential sickness.

Counting Sessions

The HerdView® App comes with a "Counting Session" feature that will help you quickly and effectively count and manage your animals.

HERD⊗

HerdView®
Application Training (excluding HHR) ❯

TAG. TRACK. TAP

HerdView® RFID Cattle Tags

Ultra-High Frequency (UHF) RFID cattle tags provide the most accurate, reliable livestock tracking, session counts, inventory, and transfers.
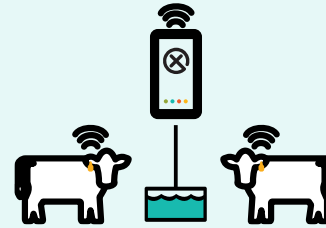
HerdView® Intelligent Area Monitoring

The HerdView® system actively monitors each animal's movements to and from water or feed troughs, alerting operators to the early warning signs of potential sickness.

HerdView® Smart Reader (HSR®)

With the latest in high-speed cloud-connected tech built in, solar-powered smart readers deliver 24/7 monitoring—no Wi-Fi, server or wired power-source required.

HerdView® Mobile App

Know Your Herd® anytime, anywhere from the palm of your hand. Streamline tasks, counts, animal records and transfers.

THE HERDVIEW® MOBILE APP
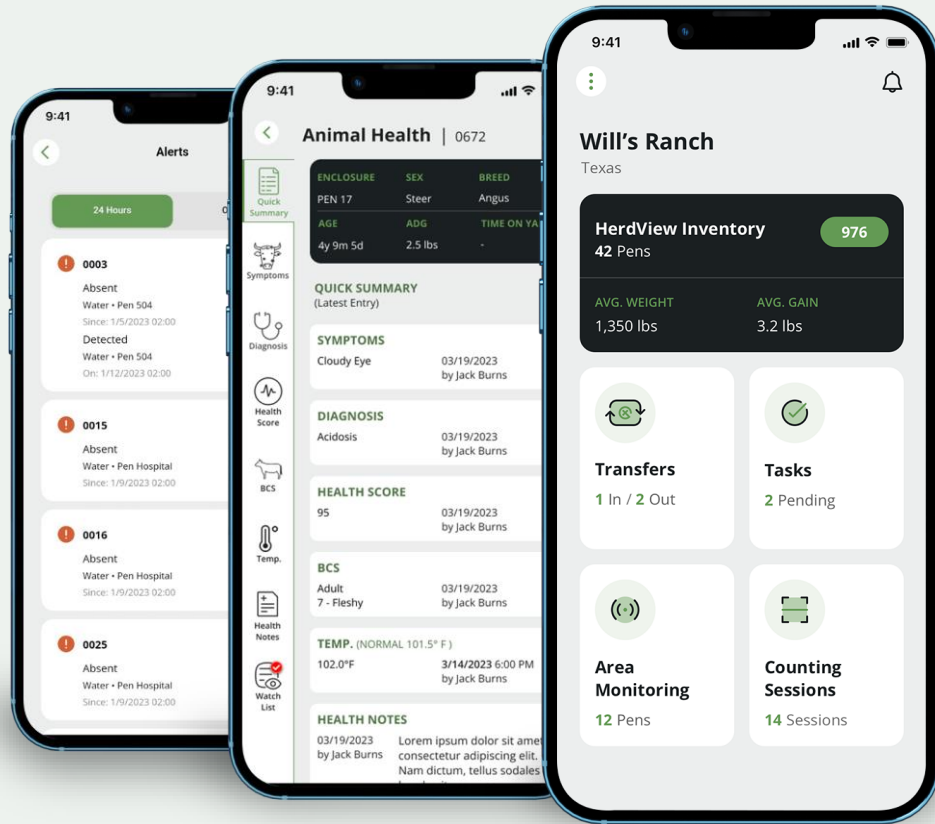
The HerdView® Application is a user-friendly herd management application for the livestock industry that works with Android & iOS. The application is designed leveraging leading cloud frameworks that dynamically scale performance as more users are onboarded. The simple and intuitive HerdView® application makes herd management easier than ever. With real-time tracking, tasks, transfers, animal health and counting data, plus Intelligent Area Monitoring alerts at your fingertips, it is like putting a new cowboy to work. You can check animals' health anywhere right in the palm of your hands.

HerdView® App Features:

- **Area Monitoring** - Animal Movement Monitoring with Alerts.
- **Counting Sessions** - Animal Counting and Validation.
- **Inventory** - Animal Records, Management, Control, Reporting, etc.
- **Tasks & Alerts** - Task Management, Due Dates & Monitoring Alerts.
- **Health/Treatment -** Manage and Monitor animal wellbeing.
- **Transfers** - Traceability between ranches, locations, pens/pastures and 3rd parties.
- **Notifications** - Area Monitoring Alerts, Tasks, Transfers, and Treatment Reminders.

1A. LOGIN
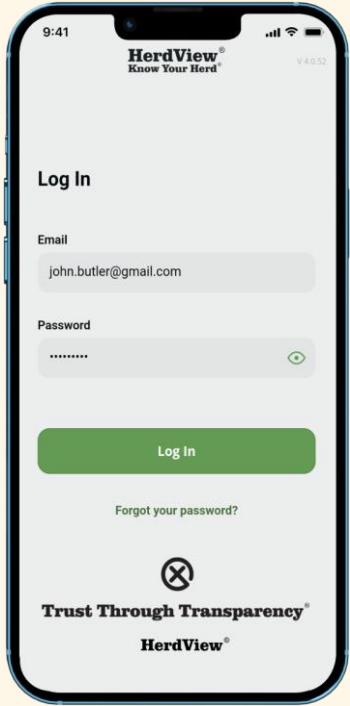
Welcome to the HerdView® Application!

Enter your account credentials and press **"Login"**.

If you have forgotten your password, follow the **"Forgot your password?"** prompts below the login button to reset your password.

1B. MAIN DASHBOARD ("HOME PAGE")

"Once" you have signed in, you will be taken to the "Home" page.

In the upper left-hand corner, there are "three dots" which when selected will take you to the "Settings" page. At this time under "Settings", The user actually sees the following:

- **Manage Sites** - add, select and edit sites
- **Data Management** - ability to export data - via a CSV file
- **App User Guide** - ability to download pdf of app user guide
- **Logout** - ability to logout of the application
- **App Version** - the version/build of app, the user is using
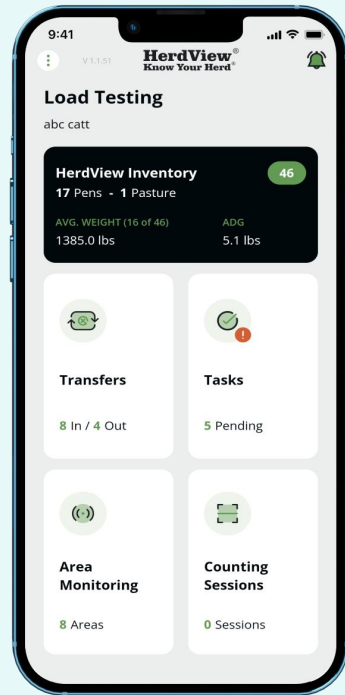
Hit the **"arrow"** in the left-hand corner of the **"Settings"** page and you will be directed back to the Home page.

In the upper-right hand corner, there is a "bell" which if selected will take you to a new page that will provide you with a listing of outstanding notifications. Hit the "arrow" in the left-hand corner of that page and you will be directed back to the Home page.

Back at the Home page you will see the following five cards that include the primary features/functionalities of the HerdView® application:

- **HerdView® Inventory**
- **Transfers**
- **Tasks**
- **Area Monitoring**
- **Counting Sessions**

The details and instructions on the functionality of the above will be reviewed in detail in the User Application Guide.
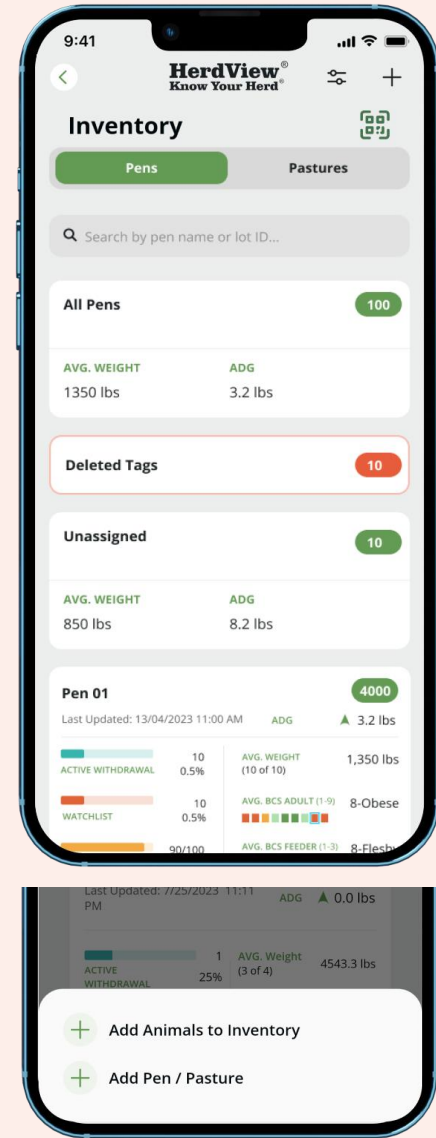
2. ADDING TO INVENTORY

HerdView Inventory — 74
7 Pens - 0 Pastures

AVG. WEIGHT (10 of 74)   ADG
2318.3 lbs   0.0 lbs

In the top right-hand corner of the **"HerdView® Inventory"** card, in a green oval shape, you will see the total number of animals in your Inventory, across multiple Pens/pastures. Additionally, the number of pens, combined average weight and ADG are also provided.

Tap the **"HerdView ® Inventory"** you have a card to see all of your animals in inventory, across pens and pastures.

In this section, we'll show you how to add animals to inventory, and add new pens and pastures to inventory.

But before you start, please take note that you have a card with "All Pens" that gives you same information noted on previous page and provides a card for each pen with same information plus Lot ID and date last updated.

To add new inventory, begin by tapping the **"+"** symbol in the upper right corner of the app. Also you can add by using "⬚" icon top right to add animals to inventory.

Additional notes:
If you see a card on this screen with **"Unassigned"**, animals in this category have not been assigned to a **"Pen"** or **"Pasture"**. **"Unassigned"** animals will add to the total animal count on the main **"Inventory"** card on the previous page. Also, the one **"Unassigned"** animal inventory card will be shown in both the **"Pens"** and **"Pastures"** cards.

Next, you'll see a pop-up menu at the bottom of the screen where you will have the option to add animals to inventory. Select **"Add Animals to Inventory"** and continue to the next page.

We'll cover three ways to add animals to your inventory

1) Mobile Device Camera through a QR code scan.
              or
2) with your HerdView® Smart Reader.
              or
3) with Manual Entry.

Select your preferred method of adding to inventory.
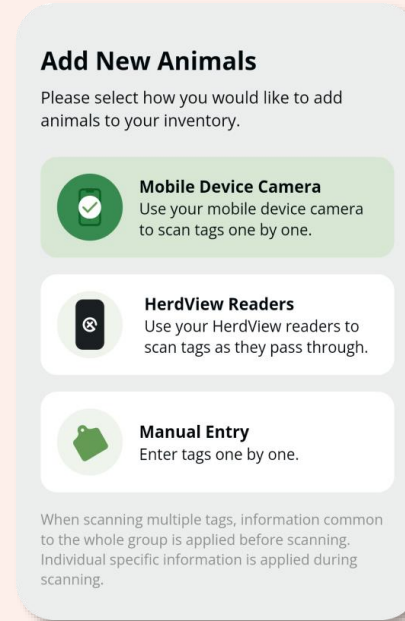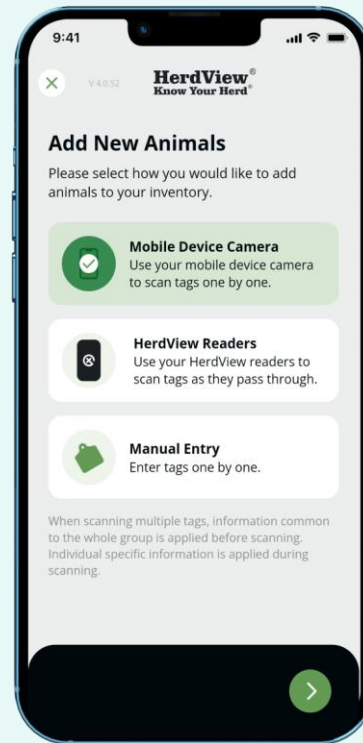
To **'Add New Animals'** to inventory by scanning QR codes, select **'Mobile Device Camera'** and tap on the lower **"green arrow"** to continue with next steps.
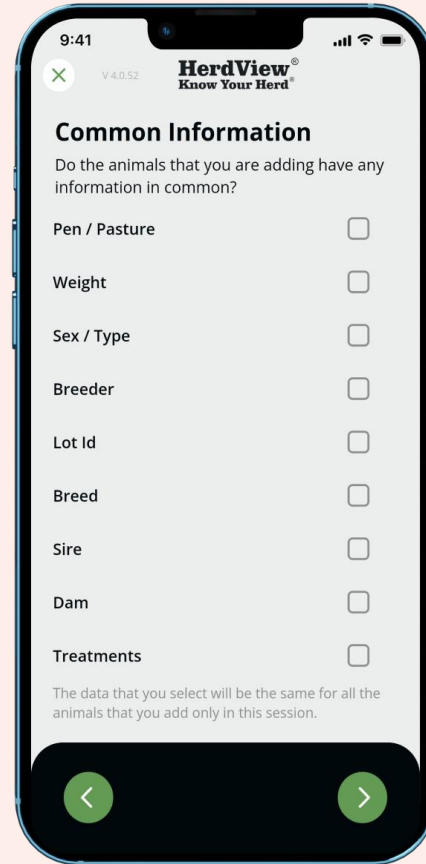
2A – ADD WITH QR CODE

Next, you'll have the option to select **'Common Information'** for the animals you are adding. Just remember, you'll always be able to go back and edit these fields later, but this gives you the opportunity to save some time from the beginning.

Once you've made your selection on the previous screen, continue to the next page, where you will be able to fill out the selected fields on this screen.

Fill out each field based on the **"Common Information"** selections you made on the previous page. You can go back to the previous screen and modify the selections.

Tap the lower **"green arrows"** to go forward or go back to the previous screens.

After you've filled in each field, you'll continue to **'Specific Information'**. Just hit the arrow on the right to go forward. Here, you can select any fields you'd like to fill in for each individual animal when scanning their respective tag. Please note, adding **"Specific Information"** is optional.

Please note you can save the selections by turning on the **"Save preferences for the next time"** at the bottom of the screen.

If you need to go back to the previous screen just hit the **"green arrow"** on the left.

Now it's time to start scanning tags! Select **"Start Scanning"**.

Remember the more animal information you enter, whether now or later, the more information you will have to more effectively and efficiently manage and **Know Your Herd** ®
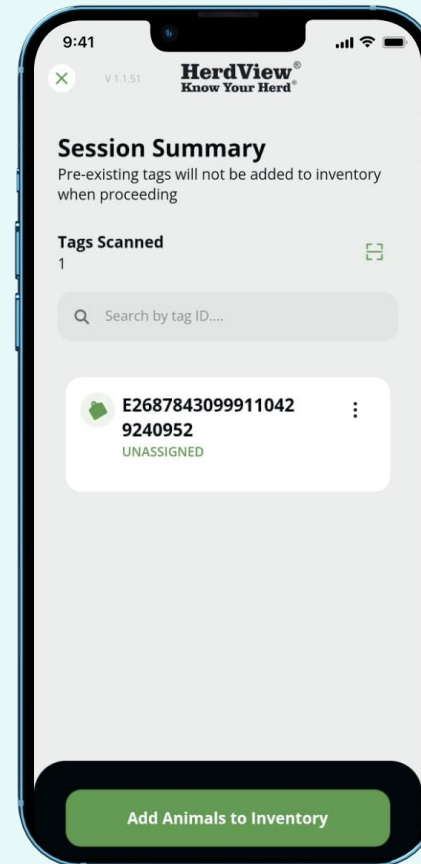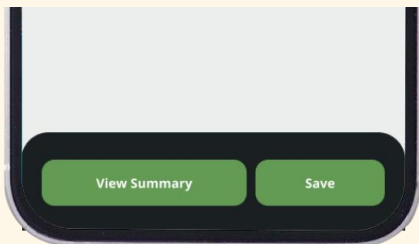
2A – ADD WITH QR CODE

To scan each tag, focus the camera on the QR code. Be sure to place your camera close to the tag to ensure a good tag read. Scan each QR code and fill out any selected specific fields on the **"Add Information"** screen (following page).
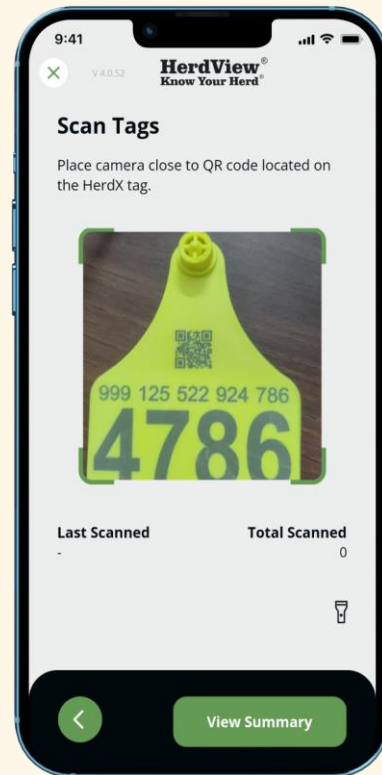
Tap the lower right-hand button to **'Save'** each tag scan.

You can also hit **"View Summary"** to see the summary of the work you have done.

On the **"Session Summary"** page you can see the number of **"Tags Scanned"** and a listing of the tags scanned with additional information. You can also perform a search on the tag number.

When you have finished scanning the desired tags and reviewed the summary for your session, tap **"Add Animals to Inventory"** in order to save the work you have done.

You are all set now! If you need to review the animals that you have set up, or edit any of the information, you can navigate to Section 3 on **"Inventory Management"**.

2B – ADD WITH READER

STEP 1

To "Add New Animals" to inventory using your HerdView® Readers, select **'HerdView® Readers'** from the options on this page and tap the lower "green arrow" in the circle to continue.

Add New Animals

Please select how you would like to add animals to your inventory.

Mobile Device Camera
Use your mobile device camera to scan tags one by one.

HerdView Readers
Use your HerdView readers to scan tags as they pass through.

Manual Entry
Enter tags one by one.

When scanning multiple tags, information common to the whole group is applied before scanning. Individual specific information is applied during scanning.

STEP 2

From here, you'll be able to **"Select Reader Device(s)"**.

Be sure that your phone's Bluetooth and location feature is turned on as well – you can check this in your phone's settings.

Select Reader Device
Power on the readers and make sure your device is within 5 feet.

RFID-05CA-6J5PNI
ID: 7C:9E:BD:A8:05:CA
Detection Mode: Max
29%

RFID-FFCE-QOFZRR
ID: E0:E2:E6:31:FF:CE
Detection Mode: N/A
N/A
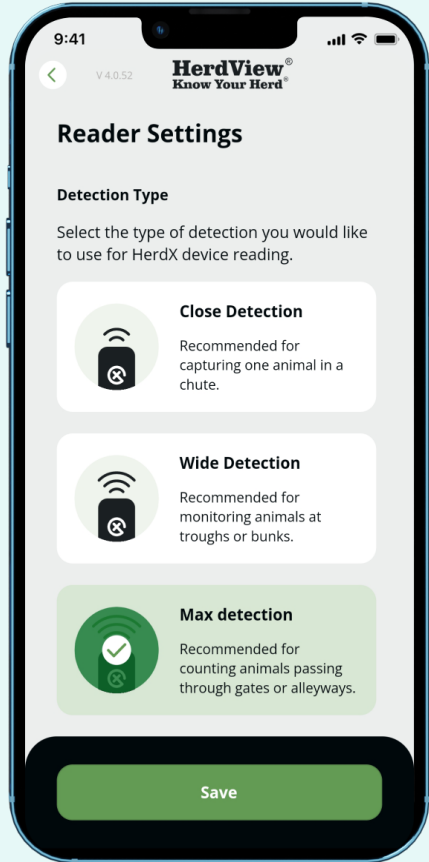
STEP 3

Your HerdView® Reader comes with 3 power options. When scanning, choose the reading range option that best suits your needs. Scanning with the wrong power setting may result in unread tags.

Close Detection – choose this option for chute side scanning sessions.

Wide Detection – choose this option for area monitoring, such as over water troughs.

Max Detection – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates & alleyways.

Once you have made your selection, hit the **'Save'** button.

Reader Settings

Detection Type

Select the type of detection you would like to use for HerdX device reading.

Close Detection
Recommended for capturing one animal in a chute.

Wide Detection
Recommended for monitoring animals at troughs or bunks.

Max detection
Recommended for counting animals passing through gates or alleyways.

Save

2B – ADD WITH READER

STEP 4

From here, you'll select and enter fields of **"Common Information"** for the group in this scanning session.

Please note you can save the selections by turning on the **"Save preferences for the next time"** at the bottom of your screen.
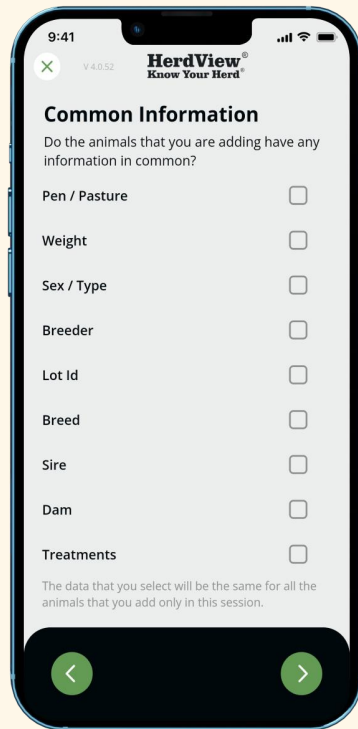

STEP 5

Fill out each selected **"Common Information"** field and tap the **"green arrow"** to continue.
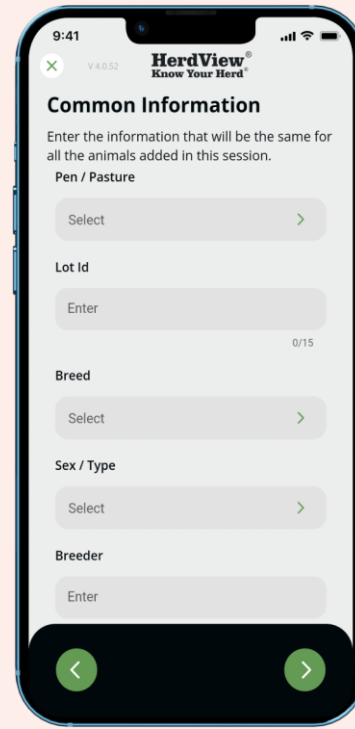
STEP 6

Next, you'll be able to add **"Specific Information"** for each tag scanned. This feature works well if you are adding animals through a chute.

To begin a scanning session, tap the green **'Start Scanning'** button on the lower right-hand corner. You can always go back to the previous screen by hitting the **"green arrow".**
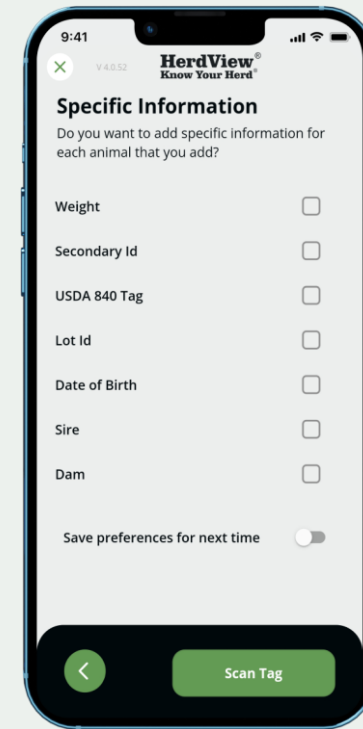
2B – ADD WITH READER

STEP 7

As each tag is scanned, you'll be able to **"Add Information"** and continue. Be sure to hit **"Save"** when you have finished adding the information.
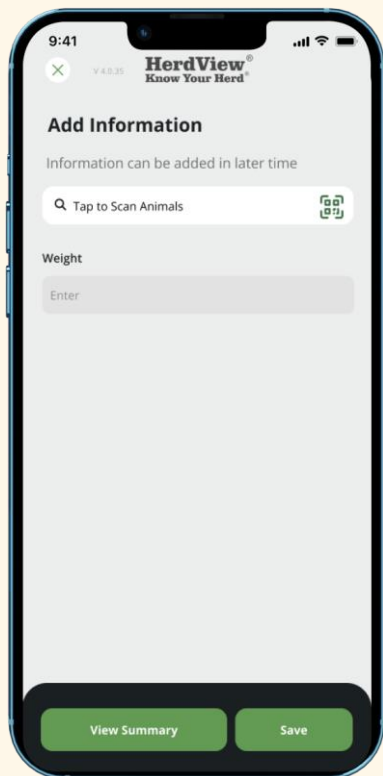
STEP 8

As you continue the reader scanning session, a list of all scanned tags will appear on the screen. If necessary, you can review and edit information.

If you need to review your animals, or edit information, Refer back to Section 3 on **"Inventory Management"**.
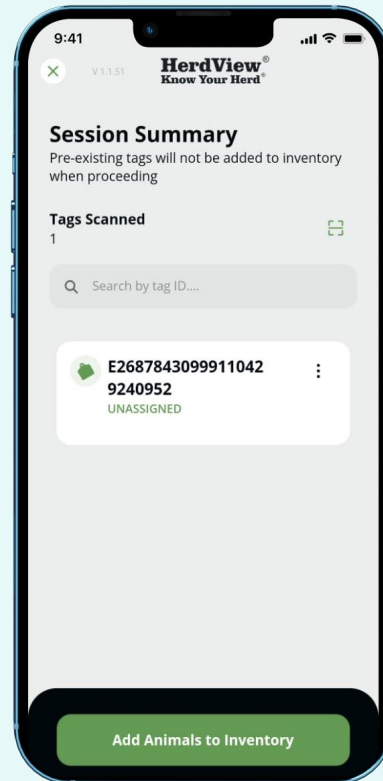
STEP 9

After you have finished your session, select the option **"Add Animals to Inventory"** and confirm to complete the session.

If you choose to cancel, you will be taken back to the session summary.
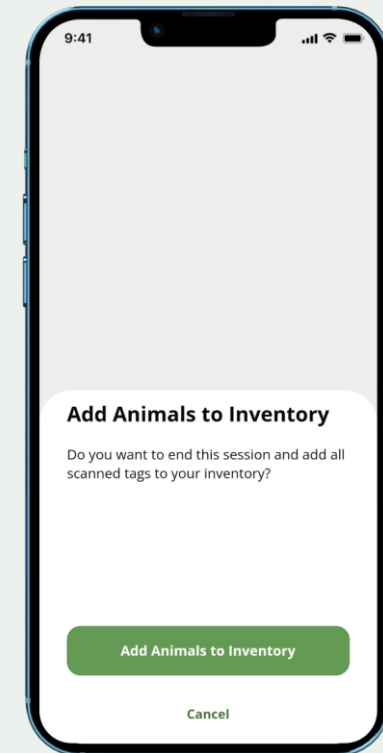
2C – ADD WITH MANUAL ENTRY

Add New Animals

Please select how you would like to add animals to your inventory.

Mobile Device Camera
Use your mobile device camera to scan tags one by one.

HerdView Readers
Use your HerdView readers to scan tags as they pass through.

Manual Entry
Enter tags one by one.

When scanning multiple tags, information common to the whole group is applied before scanning. Individual specific information is applied during scanning.

STEP 1

To **'Add New Animals'** to inventory by Manually, select **'Manual Entry'** and tap on the lower **"green arrow"** to continue with next steps.

STEP 2

Next, you'll have the option to select **'Common Information'** for the animals you are adding. Just remember, you'll always be able to go back and edit these fields later, but this gives you the opportunity to save some time from the beginning.

Once you've made your selection on the previous screen, continue to the next page, where you will be able to fill out the selected fields on this screen.

Fill out each field based on the **"Common Information"** selections you made on the previous page. You can go back to the previous screen and modify the selections.

Tap the lower **"green arrows"** to go forward or go back to the previous screens.

Common Information

Do the animals that you are adding have any information in common?

- Pen / Pasture
- Weight
- Sex / Type
- Breeder
- Lot Id
- Breed
- Sire
- Dam
- Treatments

The data that you select will be the same for all the animals that you add only in this session.
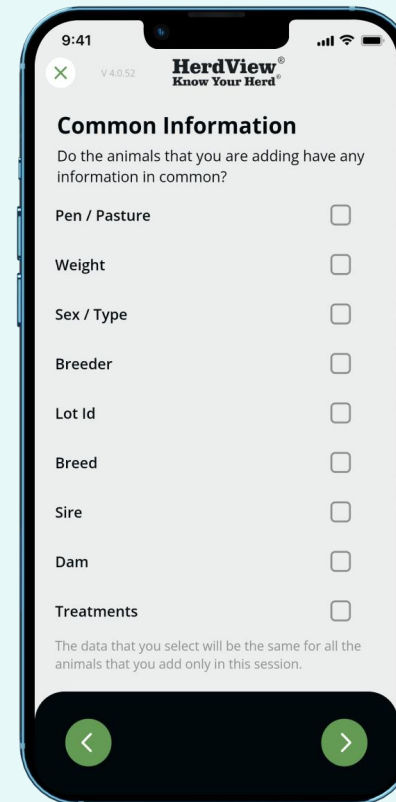
2C – ADD WITH MANUAL ENTRY

STEP 3

After you've filled in each field, you'll continue to **'Specific Information'**. Just hit the arrow on the right to go forward. Here, you can select any fields you'd like to fill in for each individual animal when scanning their respective tag. Please note, adding **"Specific Information"** is optional.

Please note you can save the selections by turning on the **"Save preferences for the next time"** at the bottom of the screen.

If you need to go back to the previous screen just hit the **"green arrow"** on the left.

Now it's time to start scanning tags! Select **"Start Scanning"**.

Remember the more animal information you enter, whether now or later, the more information you will have to more effectively and efficiently manage and know your herd.

STEP 4

After tapping on the **"Enter Tag"** option, you will be taken to a page with a text input field to enter the tag ID. On this screen, you need to input a pre-assigned 4-digit tag ID for the selected first 11 digits. The valid range for the tag ID will be provided below on the page.
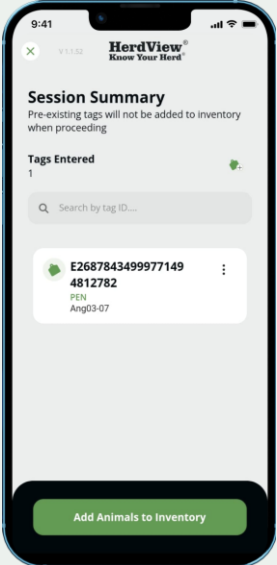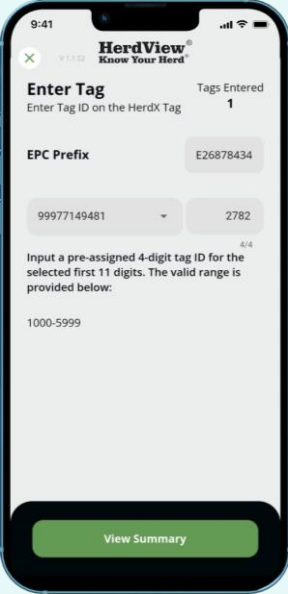
STEP 5

After tapping on the **"View Summary"**, you will be taken to the **"Session Summary"**. In that you can view the tag mentioned card with detailed card number.

2D – ADD NEW PEN / PASTURE
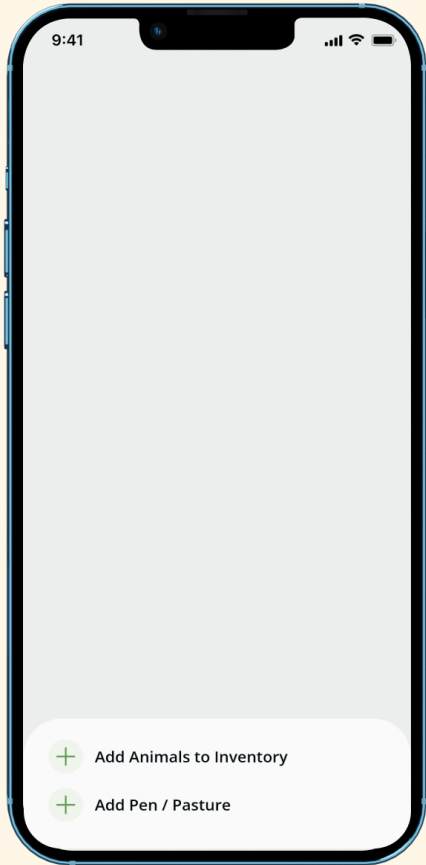
To adding a new pen or pasture, begin again by tapping the **"+"** symbol on the upper right-hand corner of the original Inventory page shown on

You'll see a pop-up menu where you'll see the option to add animals to inventory. Select **'Add Enclosure'** and continue to the next page.
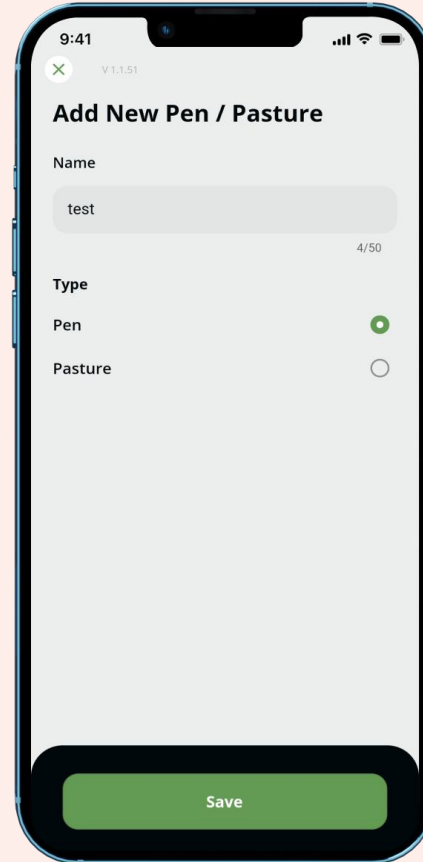
Enter the **"Enclosure Name"** and **"Lot ID"**, and designate if it is a pen or pasture under **'Type'**. Once you've filled in the required fields, be sure to tap the green **'Save'** button at the bottom of your screen.

You will now be able to see this pen or pasture in your HerdView® inventory card.

You can edit or delete a pen / pasture after saving. Enclosures can only be deleted, If there are no animals currently assigned to that enclosure.

If you do not select a enclosure at the time animal is added the animal will go to **"Unassigned Inventory"**. You will be able to see a list of **"Unassigned Inventory"** on the HerdView® inventory card.

(833) 437-3987 | support@herdx.com

3 - INVENTORY MANAGEMENT
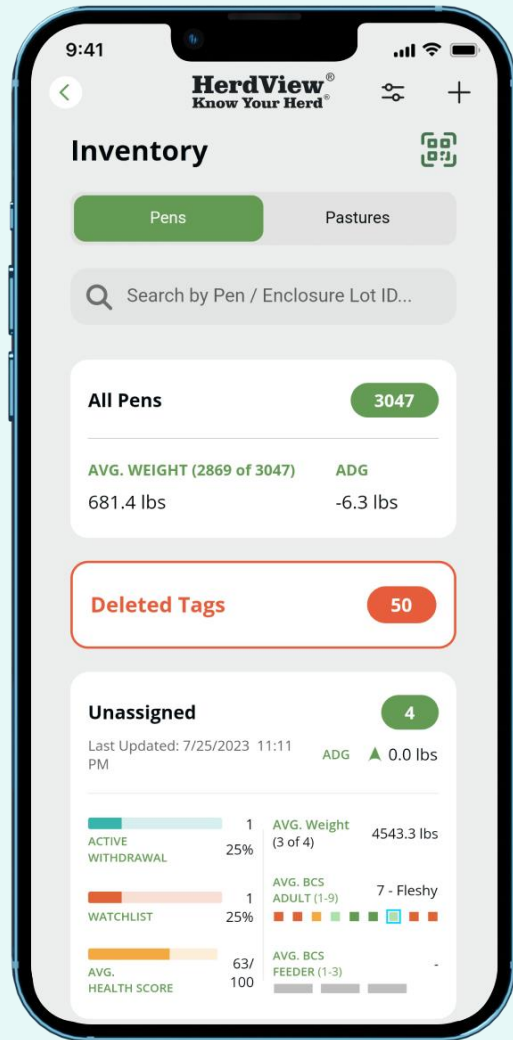
Begin by tapping the **"HerdView® Inventory"** card on the **"Home"** page. You will be at the **"Inventory"** page. From there you'll see a scrollable list of all Pens and Pastures in the system. You can use the search bar to find animals by Enclosure or Lot ID.

By selecting the **"toggle / filter"** icon in the upper right-hand corner, you'll also be able to sort and filter by Pen name or Lot ID.

Each pen card will also display the average weight and average daily gain of all animals assigned to that "Enclosure".

3A – SEARCH & FILTER PENS

3B – SEARCH & FILTER ANIMALS

You can sort by:

"Pen Name" - Ascending and Descending
"Lot ID" - Ascending and Descending

Make your sort and filter 'selections' then tap **'Apply Filters'**.
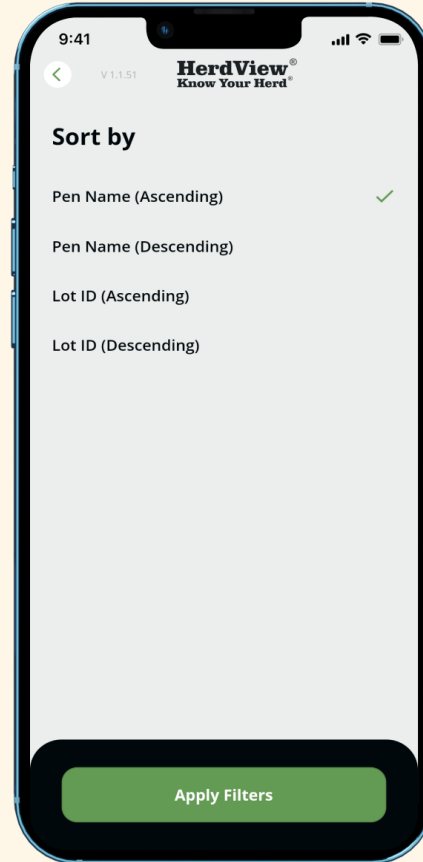
Then to search and/or filter animals in a pen, first navigate to the **"Inventory"** screen. Select the pen that you are interested in looking at.

Once you've found the pen or pasture you're looking for, tap the Black Pen Card to see the animals you have in inventory.

You can sort and filter by tag ID, lot ID, weight, and more attributes by selecting the **"filter toggle"** " ⚙ " in the upper right-hand corner.

For each pen/pasture you will see card listing of animals in the pen/pasture identified by the tag number. Each tag card/number will have additional information about the animal.

3B – SEARCH & FILTER ANIMALS
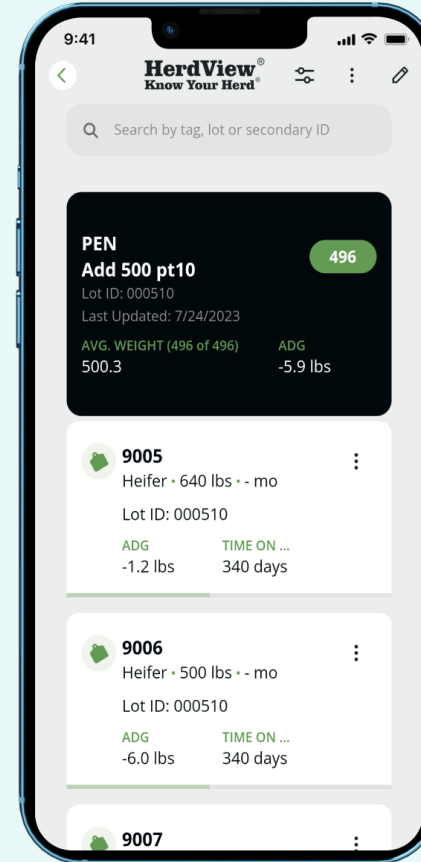
3C – UPDATE ANIMAL DETAILS

Here you can select your **"Sort By"** and **"Filter by"** options.

Sorts are either **"Ascending"** or **"Descending"** with options for Tag ID, Weight, ADG, Time On Yard and Age.

Once you have made your selections tap **"Show All Results"** and the filtered icon looks like this " ⚏ " when viewing a pen/pasture with filtered results. You will first see the number of animals included in the sort/filter and from there you will be taken to a screen that shows the individual results.

To view and update individual animal details, tap the Black Animal Tag ID.

You'll see a **"pencil"** icon in the upper right-hand corner. Tap this to edit any of the applicable animal information fields.

Tap the green **'Save'** button once you've edited animal information details.
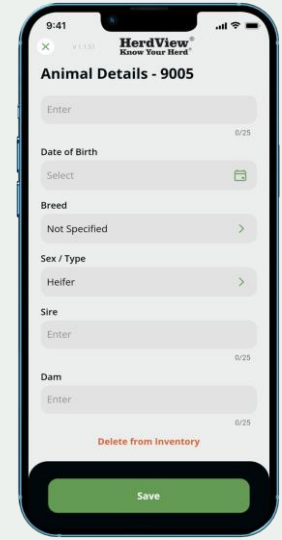
3D – PEN MOVEMENT

To move some or all the animals in one Pen / Pasture to another, begin by searching and selecting the **"Enclosure"** you want to transfer animals out of.

Tap the **"three dots"** icon in the upper right-hand corner of the screen.
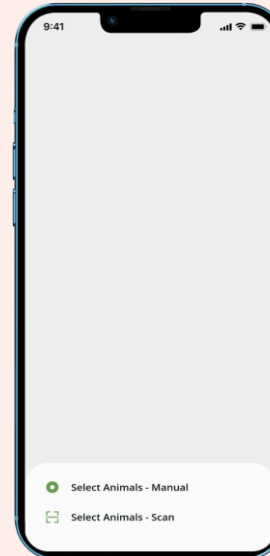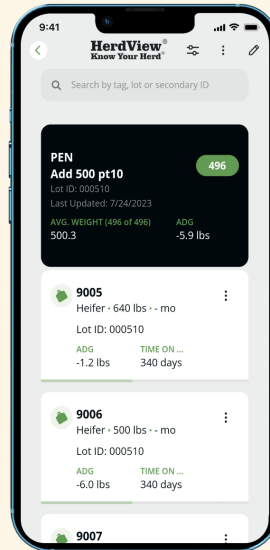
Tap **"Select Multiple – Manual"** from the pop-up screen. Pen/pasture movement can also be done by selecting **"Select Animals - Scan"** with a HerdView® Smart Reader
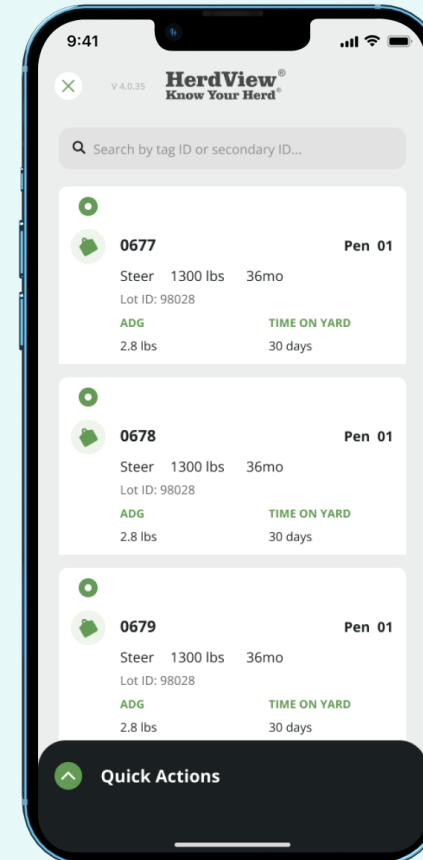
While on this screen you have the option to select all the animals (tags) in the pen or manually select individual animals/tags.

If you want to select all the animals hit **"Select All"** in the upper-right hand corner of the screen.

If you want to select only certain animals/tags just check the **"circle"** in from of each animal tag number.

If you **"Select All"** and decide you don't want to then you can always hit **"Unselect All"** that will be in the upper right-hand corner as well. That will remove the tag selections from the screen.

"Quick Actions" will be reviewed on the next page of the guide.

3D – PEN MOVEMENT

STEP 1

From the **"Quick Actions"** menu at the bottom of the screen, select '**Move to Pen/Pasture**'.
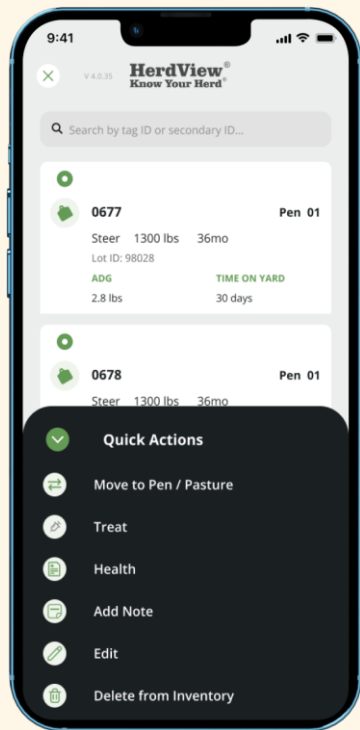
STEP 2

In the **"To Pen/Pasture"** section, choose the specific Pen or Pasture where you want to move your selected livestock.

Once you have made your selection, click on the **"Select >"** button to proceed with the process. If you fail to choose a pen, a message will appear in the lower box indicating **"No pen / pasture selected"**.
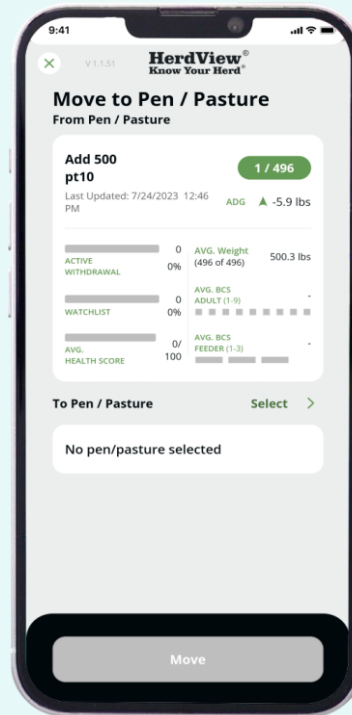
STEP 3

Confirm the information on the screen before moving on.

Be sure to tap the green **"Move"** button at the bottom of the screen to finish the movement of the animals.
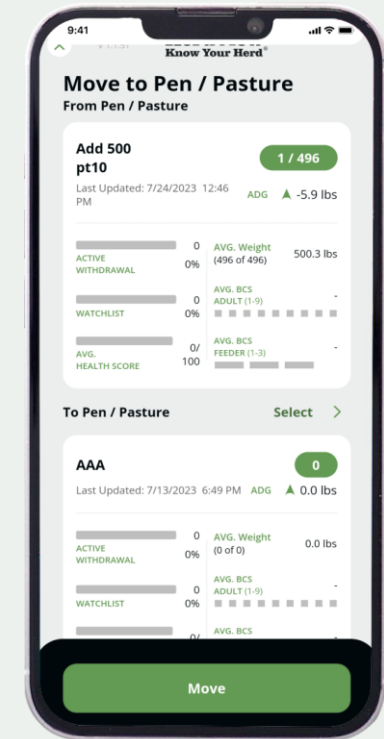
3E – ADDING NOTES

To add general notes to a specific animal, tap the square **"Note"** icon from the option menu at the bottom of the screen when viewing an animal card.

Tap the **"+"** symbol to add a **"New Note"**.
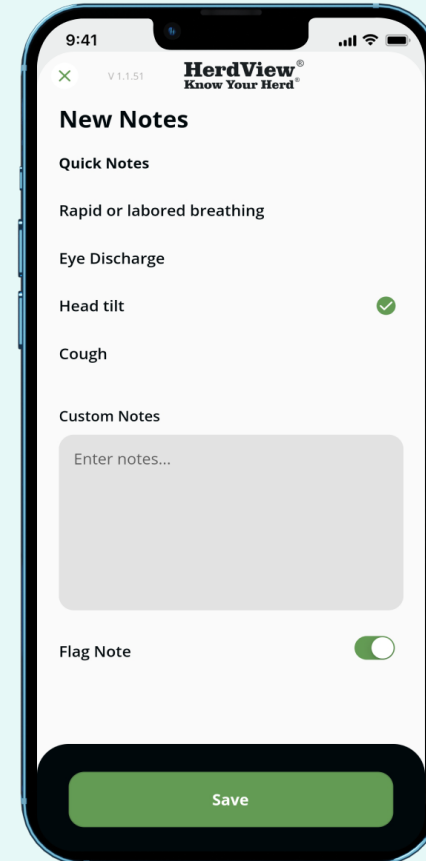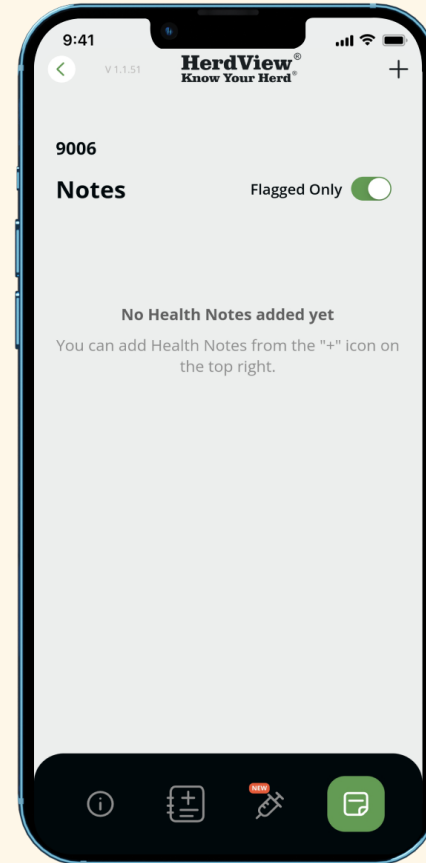
Here you'll have the option to quick-add a few common note options, such as a cough or labored breathing.

You can also add **"Custom Notes".** This is a text field.

Additionally, you can always flag a note. On the notes page you will see the **"red note"** icon for designating the flagging of a note. If you hit the **"three dots"** on the note you will see a box at the bottom of the screen. In the box there is option to unflag. Just hit **"Unflag"** and it's done!

When you are done, be sure to hit the **"Save"** button.

3E – ADD A NEW WEIGHT

STEP 1

To add a **"New Weight"** to an animal, search an animal by Pen ID or tag ID.

Tap the black animal card with the tag number, then tap the **"three dots"** at the right-hand corner of the **"Weight"** card.
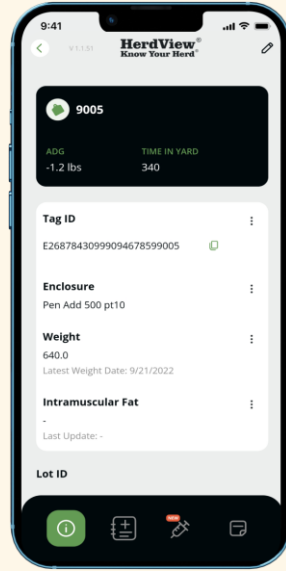
STEP 2

Tap the **"Add New Weight"** line on the bottom of the screen.

Also, if you tap on **"View Weight History"** you will see the animal's weight history with weight amount and date.
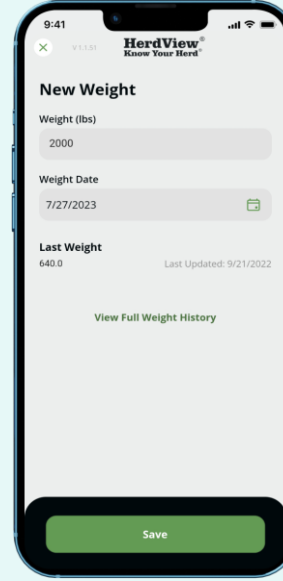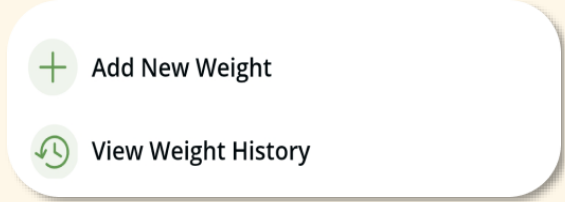
STEP 3

On this screen you can add a new weight for an animal and the date of the new weight.

The screen will also show the last weight and date updated.

By tapping **"View Weight History"** you can also view all of the weight history and with dates. When you are done, be sure to hit the **"Save"** button.

STEP 4

The **"Weight History"** will show the various weights and date logged.

You can also edit or delete weight history if needed. and you can view weight history in a graph view if you select the **"ıl|"** icon in the top right corner.

When you are done just hit the **"green arrow"** in the upper left hand corner to go back the previous page.
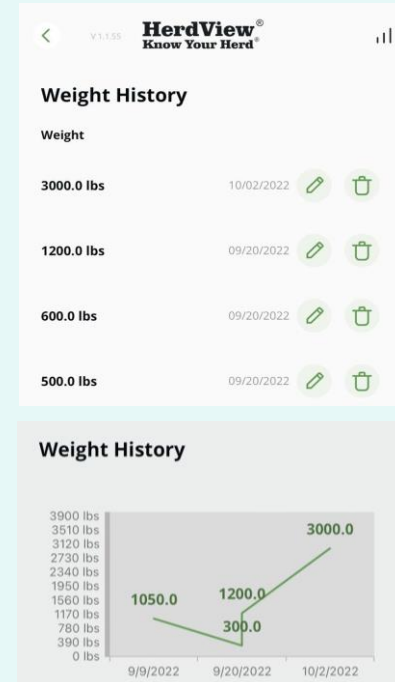
3F – DELETE A TAG FROM INVENTORY

STEP 1

To **"Delete a Tag from Inventory"**, find and select the animal ID(s) number(s) you want to delete. If you are deleting multiple tags from the same pen, you can use the **"Select All"** feature, or tap to select as many animal ID cards as you need.

If you **"Select All"** and decide you don't want all you can always hit **"Unselect All"** in the upper right-hand corner as well. That will remove the tag selections from the screen.

Revisit **"Section 3d"** for reference on how to get to the **"Select All"** feature in a specific pen or pasture.

Start the deletion by hitting the **"green down arrow"** for **"Quick Actions"**.
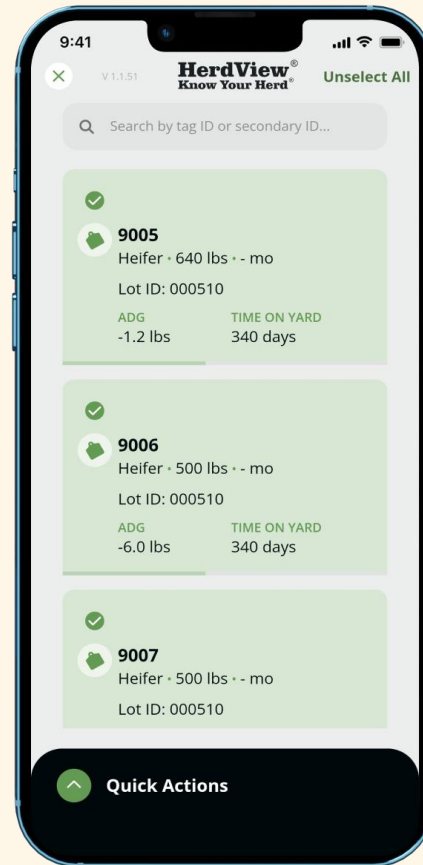
STEP 2

Using the **"Quick Actions"** menu from the bottom of the screen, select '**Delete from Inventory**'.

Deleting Animal:
Although not covered separately in this section, you can also edit animal details through **"Quick Actions"**. You will select the animal tag manually you want to edit. The **"Quick Actions"** section in black will come up at the bottom of the screen. Just click on **"Delete from Inventory"**. You will then be taken to the **"Animal Details"** screen.

If a tag is deleted the animal history will remain in the database unless the tag is deleted because it was accidentally scanned.

It should be noted that you can delete in bulk by using **"Select All"**.
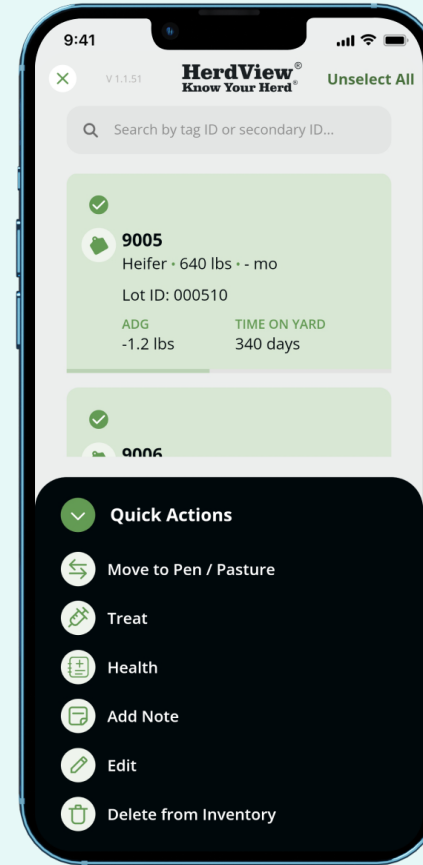
3F – DELETE A TAG FROM INVENTORY

STEP 3

Select the reason for deletion, then hit the **"Next"** button at the bottom of the screen.

In the screen example, lost or damaged tags can be Deleted by tapping the green **'Next'** option at the bottom of the screen. A tag will retain all previous information related to the animal. You can include **"AddT'L. Notes"** regarding the tag deletion for future reference.

See the following section for instructions on how to navigate the workflow for Deleting a tag.
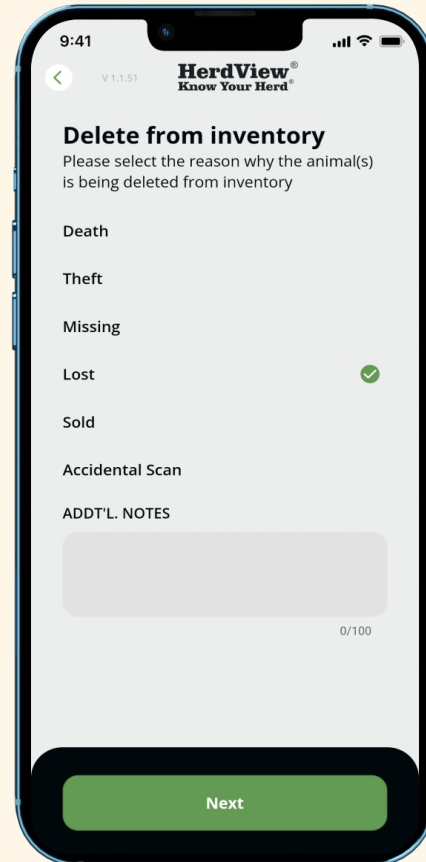
STEP 4

You will now see a list of the tags that will be deleted. Review the list and if you are okay with the list then hit **"Delete"** and the tags will then be deleted from the inventory.

You can always go back by to edit the tags you have selected by hitting the **" X "** button at the top left-hand corner of the screen. This needs to be done before you hit **"Delete"**. Deleted tags can not be readded to inventory unless the reason for deletion was an **"accidental scan"**.
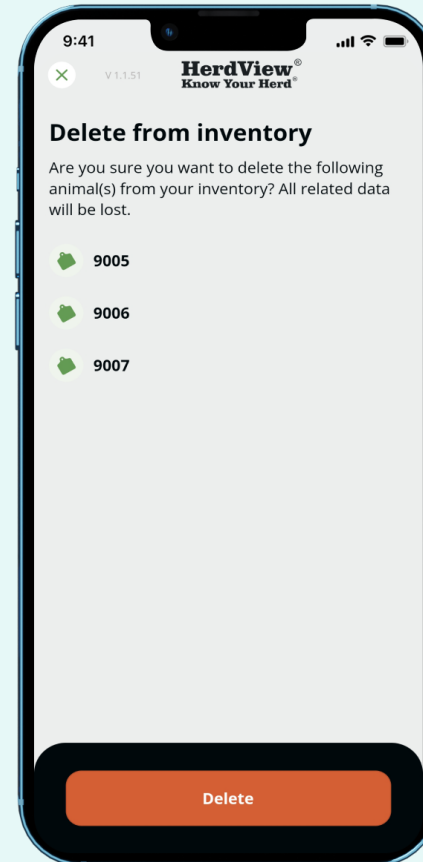
3G – REPLACING A TAG
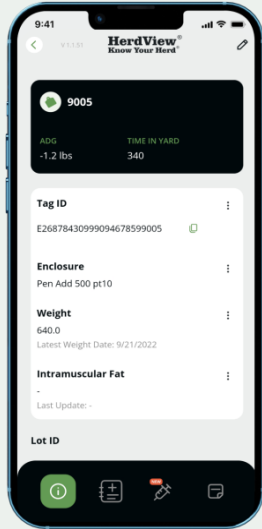
STEP 1

If you need to replace a tag, navigate to the Animal ID card you'd like to replace.

Tap the **"three dots"** next to the **"Animal ID"** number displayed at the top of the information card that follows the Animal ID card.
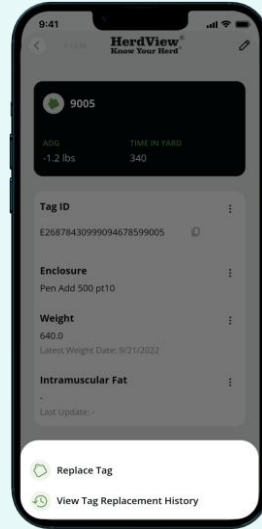
STEP 2

Next, a pop up menu will appear prompting you to choose the icon with **"Replace Tag"**.

You can also view the tag replacement history. All you need to do is choose the icon with **"View Tag Replacement History"**.
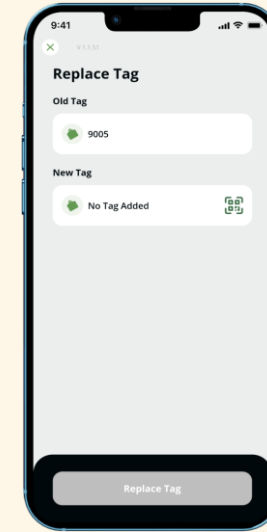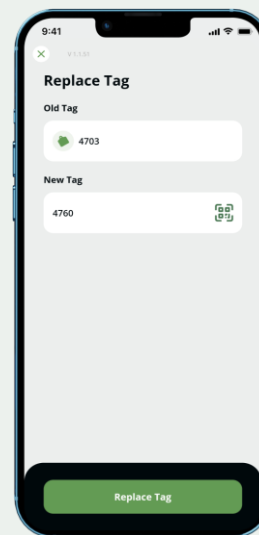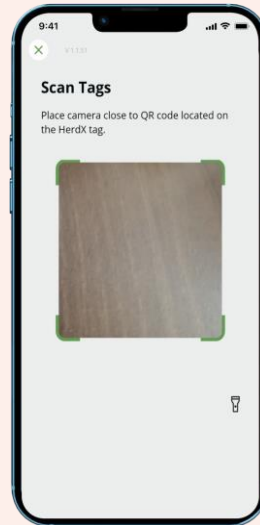
STEP 3

The **"Old Tag"** number will be shown at the top of the screen.

Under **"New Tag"**, tap the empty field to scan the replacement tag.

STEP 4

Scan your tag – this process is the same as when you scan the QR code to add a tag to inventory.

STEP 5

Once your tag has been scanned, you will see the **"old tag"** number and **"new tag"** number for verification.

A new tag number has been assigned to all data associated with the old tag. There is no data loss.

Then tap **'Replace Tag'** at the bottom of the page to finish the process.
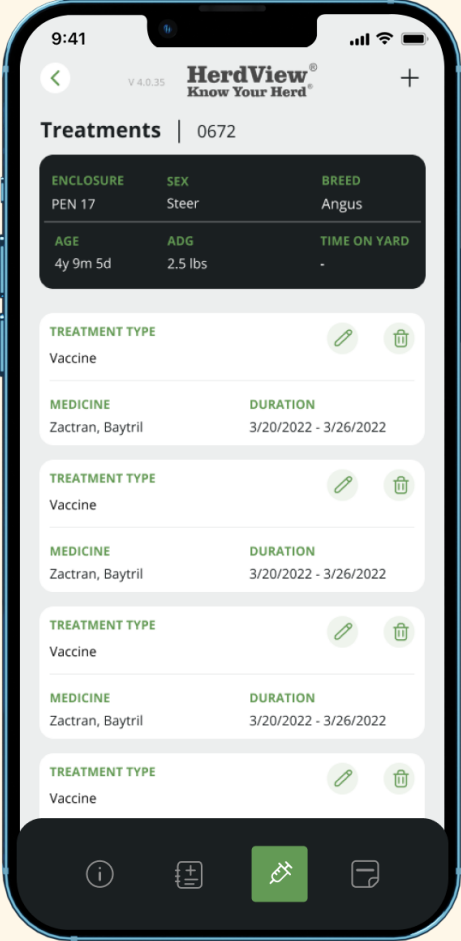
4 – TREATMENTS

STEP 1

To add and view **"Treatments"** to an animal, tap the **"Syringe"** icon from the options menu at the bottom of the screen. Doing this will take you to the treatment's summary screen. Any previously added treatments will appear as summary screen.

From that summary screen, you can edit treatments by clicking the pencil icon or tapping on the card. You can delete treatments by clicking on the trash icon.

Add a **"New Treatment"**, tap the **"+"** icon in the upper right corner.

STEP 2

Tap on the **'Treatment Type'** field to select from the dropdown list of treatments. Hit the back arrow once a treatment is selected. Optionally fill in the Vet, Prescription Date, and Prescription notes.

STEP 3

Click **'Next'** to save your entries and move to the **'Medicine'** tab.
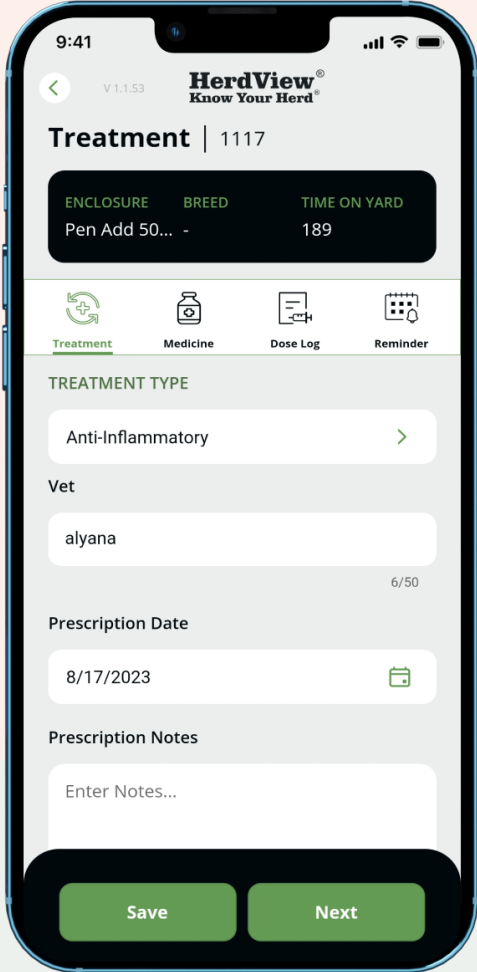
4 – TREATMENTS
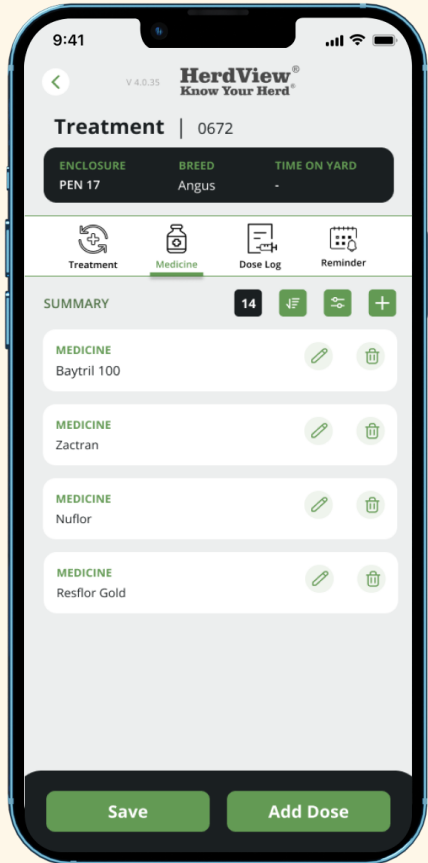
STEP 4

In the Medicine tab, you can view existing medicine or add a new medicine.

To add a new medicine, tap the **"+"** icon in the upper right hand corner.

Edit existing medicines by clicking on the medicine card or by clicking the pencil icon. Delete medicine records by clicking the trash icon and confirming your choice. You can edit or delete the medicine by clicking pencil icon for the edit trash icon to delete. Clicking that Medicine card will take you to the **'View'** screen for the Medicine. From that screen you can move to edit option directly.

STEP 5

Next, you'll have the dropdown option to select **'Medicine', 'Treatment Route',** and **'Treatment Location'** for the animals you are adding.

Optionally fill in more information such as Treatment Route, Prescription Date, Notes, and Withdrawal Date.

You can delete a medication if there is not a dose log associated with it. If there is a dose log tied to a medicine, you must first delete the dose log before you are able to delete the medicine record. You can delete dose log in the **"dose log summary".**
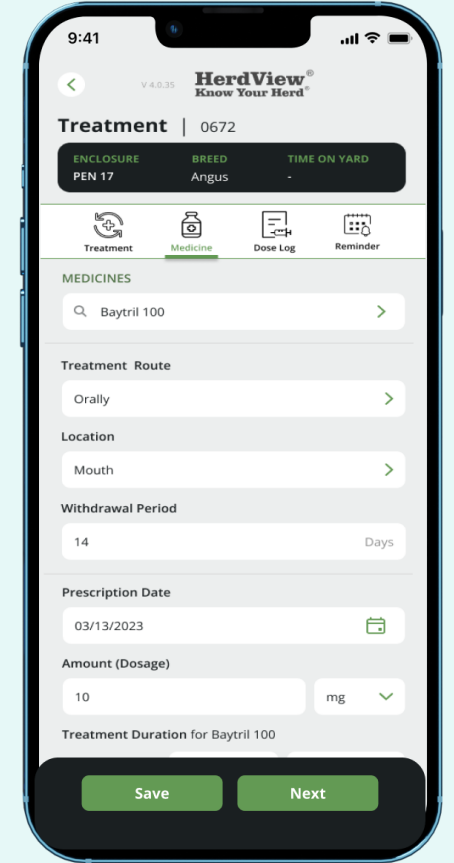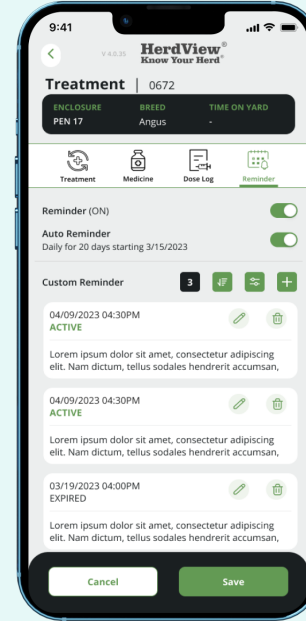
4 – TREATMENTS
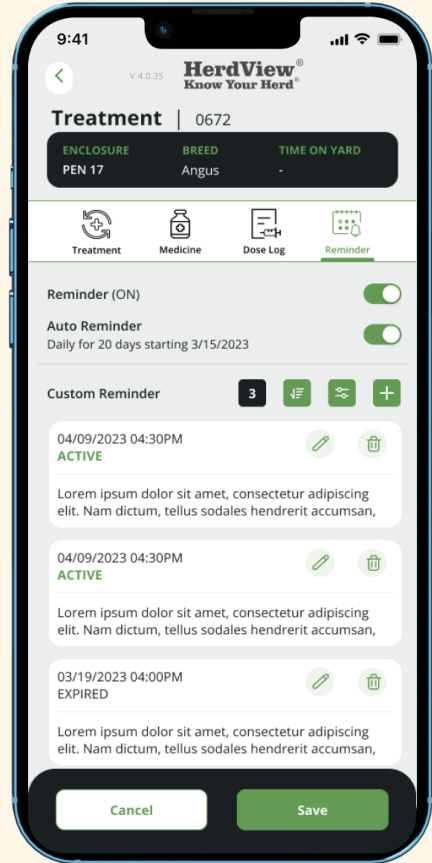
STEP 8

After you've filled in each field, then click **'Next'**. That'll take you to the Reminder summary page.

You can edit or delete **Treatment Reminders** by clicking the pencil icon or trash icon. Clicking that Reminder card will take you to the **'View'** screen for the Reminder.
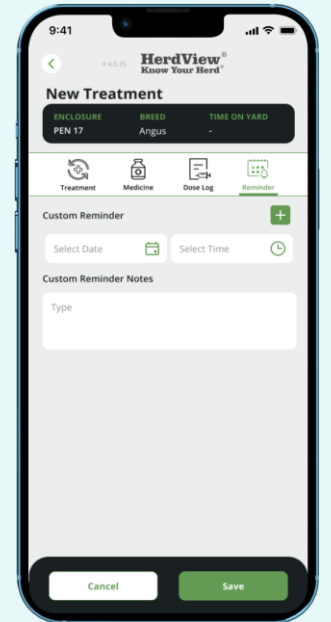

STEP 9

You have the option to enable a treatment reminder. You will receive a notification on the date set. You can also add a custom reminder by clicking the **"+"** icon.

STEP 10

After you've filled in each field, then click **'Save'**. That will take you to treatment summary screen.

In that screen you can hit a card to view or edit that treatment list.
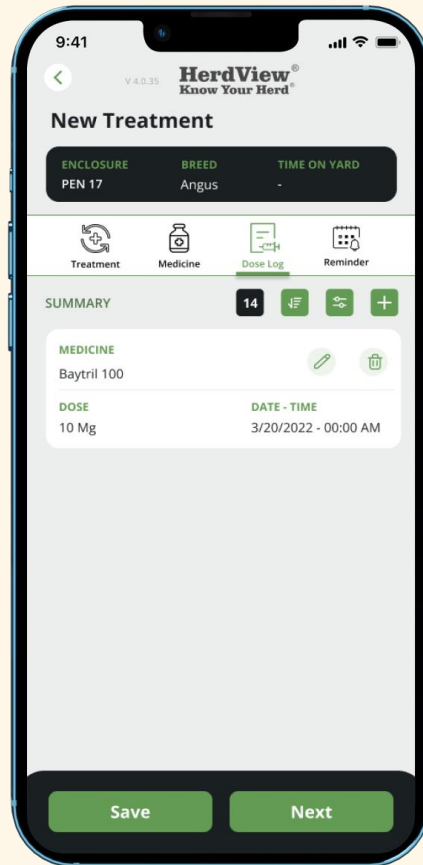
4 – TREATMENTS

STEP 6

After you've filled in the necessary fields for medicine, click **'Next'**.

You need to hit the **"Plus"** icon to add a new dose log.

You can edit and delete existing dose log records. Tap the dose card or pencil icon to edit information. Tap the trash icon to delete.

STEP 7

Next, is the option to add a **'Dose Log'** for a specific medication by selecting from the dropdown list.

You can select a Dose Log for a specific medication. Optionally input information such as **Lot ID, Serial #, Manufacturer, and Expiration Date.**
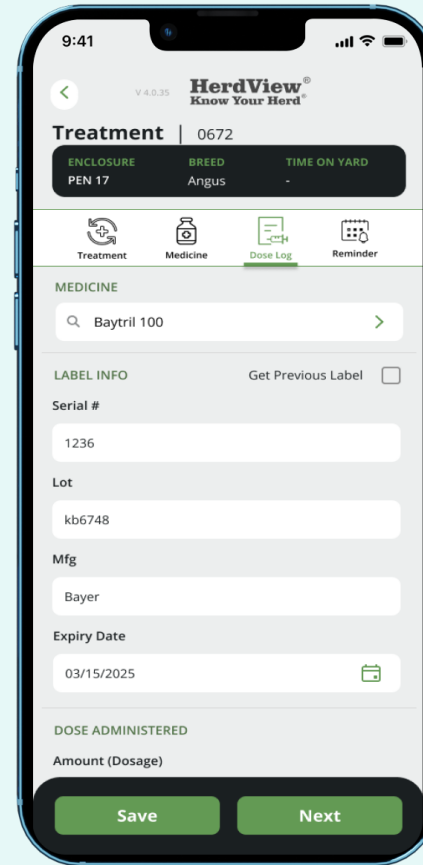
4A – BULK TREATMENTS

STEP 1

To add and view **"Treatments"** for bulk animals, follow these steps:

Navigate to a pen or pasture. Click on the three dots in the top right corner to access the **"Quick Action"** menu at the bottom of the screen.

Look for the **"Treat"** text with the **syringe icon** and click on it. This will take you to the **"Treatment Bulk"** page with the Animal Tab selected. You can add or remove selected animals. You can also see selected Tag ID's and Non Selected ID's.
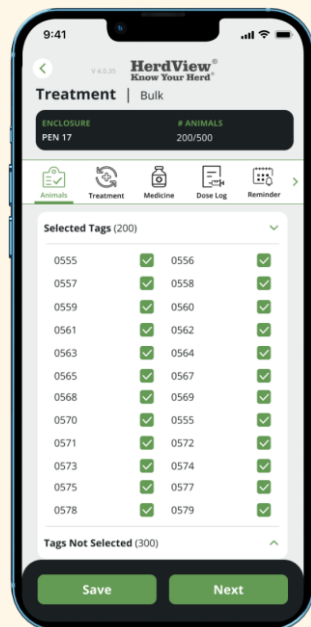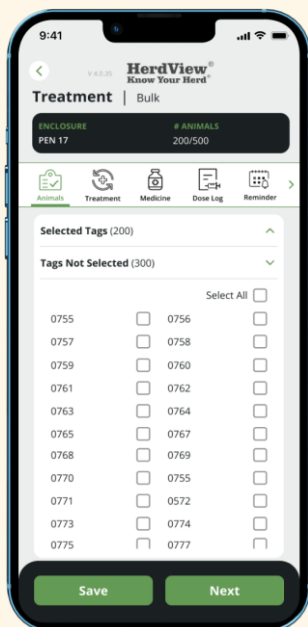
STEP 2

Click the **"Next"** button to proceed to the next process, which will display the **"Tag Not Selected"** Accordion. Click **"Next"** again to proceed to the next page.

Once you have selected all the animal tags, click on **"Next"** to continue to the **"Treatment"** section.
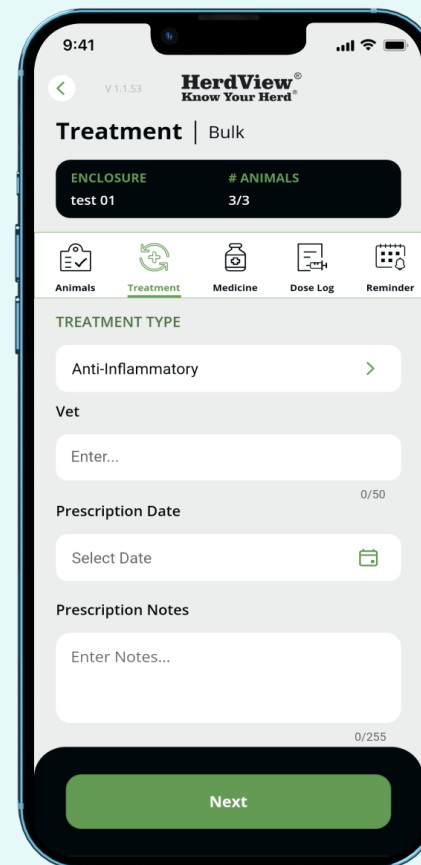
STEP 3

You will have a dropdown option to select the **"Treatment Type"** and add the vet's name in the designated field. Provide additional information such as the Prescription Date, Withdrawal Date, New Withdrawal Date, and Prescription Notes/Comments about the treatment.

Only fields designated with an asterisk **" * "** are required.
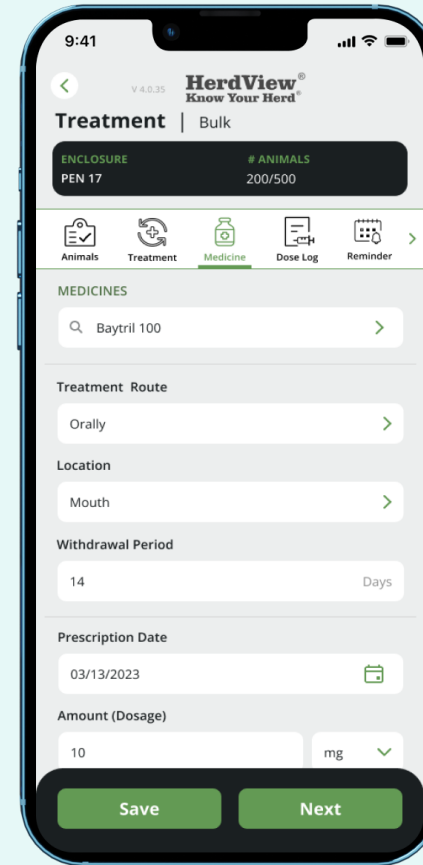
4A – BULK TREATMENTS

STEP 4

After filling in each field, click on **"Next"** to proceed to the **"Medicine Tab"**.

In the medicine tab, you can see existing medicines in the summary screen. To add a new medicine, tap on the **"+"** icon in the upper right corner. Any previously added medicines will be displayed. You can edit or delete a medicine by clicking on the pencil icon for editing or the trash icon to delete. Clicking on a medicine card will take you to the **"View"** screen for that medicine, where you can make edits directly.
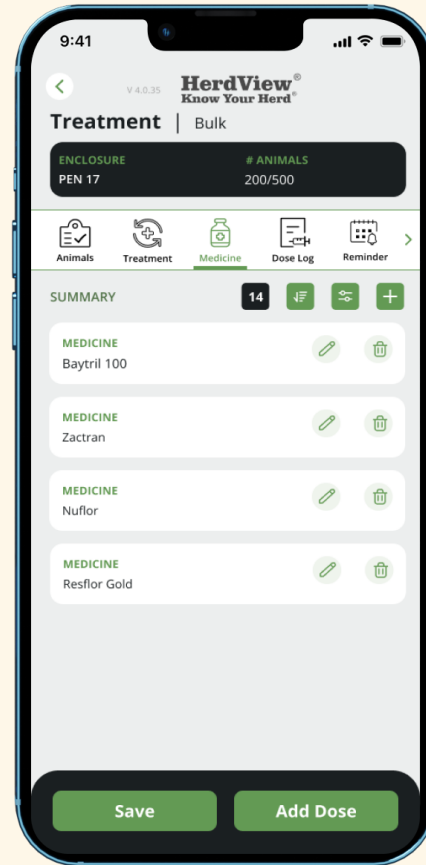
STEP 5

Next, you will have dropdown options to select the **"Medicine"**, **"Treatment Route"**, and **"Treatment Location"** for the animals you are adding. Provide additional information such as Prescription Date, Withdrawal Date, Dose Log, and Prescription Notes for the specific medicine. Note that you can only delete a medicine from the summary screen if you have not added a dose log for it. If you remove the dose log, you can then delete the medicine from the summary screen.

# 4A – BULK TREATMENTS

STEP 6

After filling in each field, click on **"Next"**. Alternatively, you can select the medicine and dosage from the summary screen.

You will then continue to the **"Dose Log"** section. You can edit or delete a dose log by clicking on the pencil icon for editing or the trash icon to delete. Clicking on a dose log card will take you to the **"View"** screen for that dose log, where you can make edits directly.
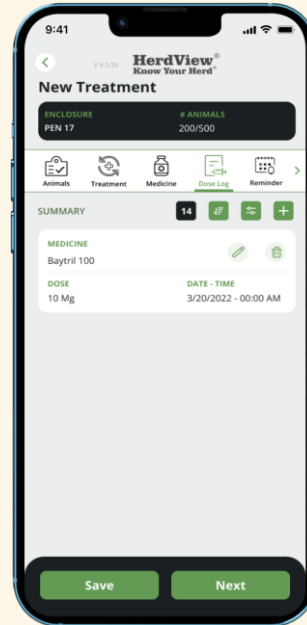
STEP 7

To select the **"Dose Log"** for the specific medicine, choose the medicine from the dropdown. Fill out the fields for Lot ID, Serial #, Manufacturer Name, and Expiration Date. Provide the dosage administration details, including the administrator's name and comments about the dosage.
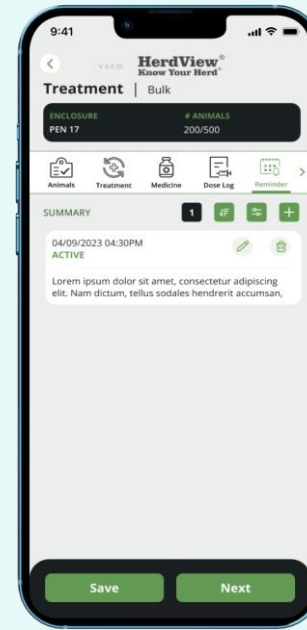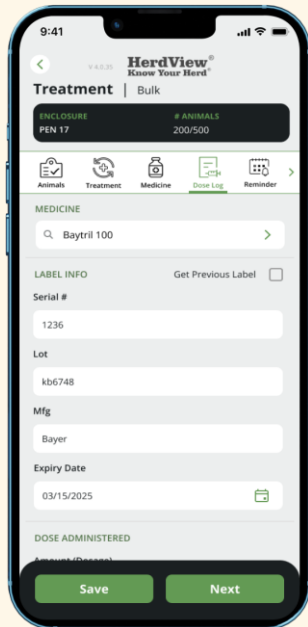
STEP 8

After filling in each field, click on **"Next"** to proceed to the **"Reminder"** summary page. You can edit or delete a reminder by clicking on the pencil icon for editing or the trash icon to delete. Clicking on a reminder card will take you to the **"View"** screen for that reminder, where you can make edits directly.

STEP 9

You will have the option to turn the **"reminder on or off"**. By default, the automatic reminder will be on when you add a treatment and medicine. You can also add a custom reminder by clicking the plus icon and providing the date, time, and custom reminder note.

HERD X
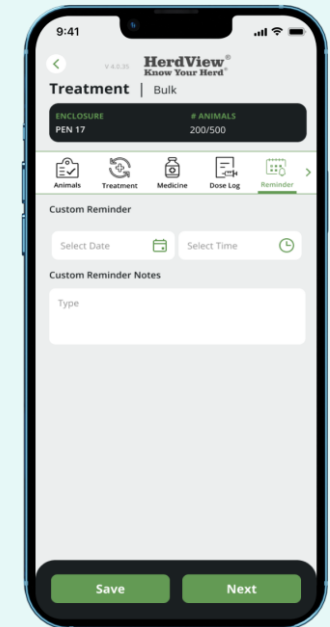
4A –BULK TREATMENTS

STEP 10

After filling in each field, click on **"Save"**. This will take you to the **Review & Save** page, where you can see the selected animal tags, treatment, medicine, dose log, and reminder for the bulk animals.
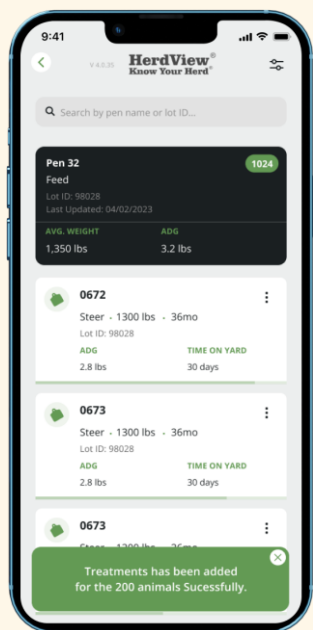
STEP 11

Clicking **"Save"** will display a popup confirmation screen for saving the bulk treatment. After clicking **"Save"**, you will be redirected to the enclosure screen with a popup message at the bottom stating, **"Treatments have been added for the animals successfully"**.
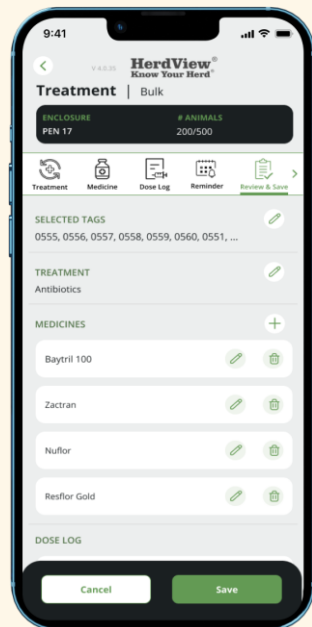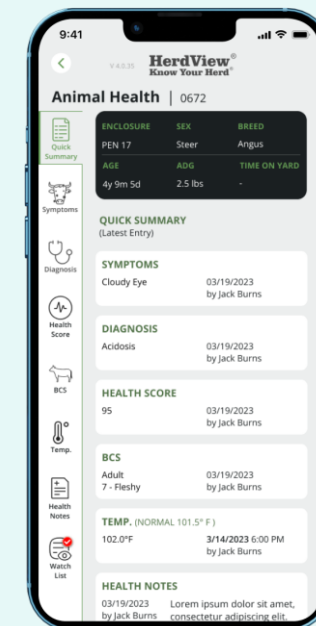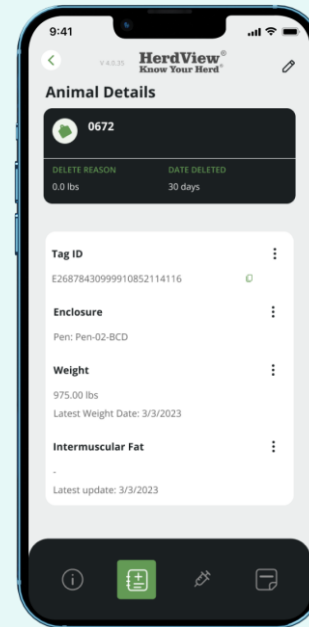
5 – HEALTH

STEP 1

To add and view **"Animal Health"** for an animal/tag, follow these steps:

Tap the **"Book with plus"** icon from the options menu at the bottom of the screen. This will take you to the animal/tag card for the specific animal.

STEP 2

On the animal/tag card, you will see the Quick Summary screen. This screen displays the Animal card, the latest entries for Symptoms, Diagnosis, Health Score, BCS (Body Condition Score), Temperature, Health Note, and the Watch list.
To access a specific health-related card, click on the corresponding card on the summary page. You can also use the side tab to navigate to the specific pages you want to go to.

5 – HEALTH

STEP 3

To access the **"Symptoms"** section, you have two options:
1. Click on the **"Symptoms Card"** in the **"Quick Summary"** section.
2. Click on the **"Symptoms"** option in the side tab.

In the **"Symptoms"** section, you will find a Symptoms Summary screen. This screen includes a Filter icon, Sort icon, number of notifications, and an add icon. You can edit and delete entries directly from this summary card.
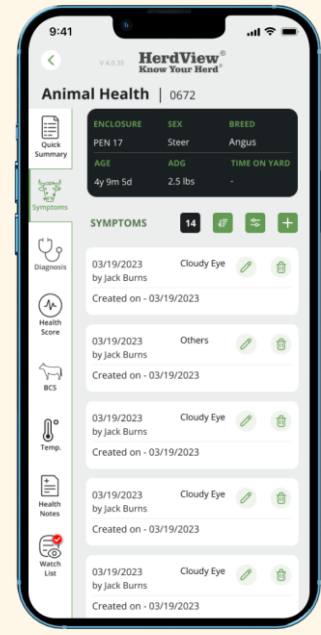
STEP 4

To add new symptoms, tap the **"+"** icon in the upper right-hand corner. You will have the option to select **"Symptoms"** and add the date and comments about the symptoms. You can also select a specific treatment from the drop-down menu.
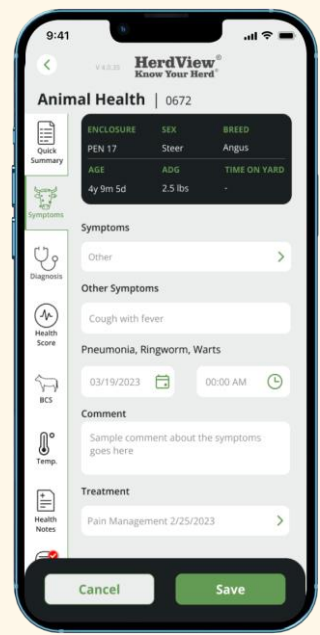
STEP 5

After filling in each field, click **"Save"** to proceed to the **"Diagnosis"** section.

In the **"Diagnosis"** section, you will find a Diagnosis Summary screen with similar options as the Symptoms section. To add a new diagnosis, tap the **"+"** icon in the upper right-hand corner.
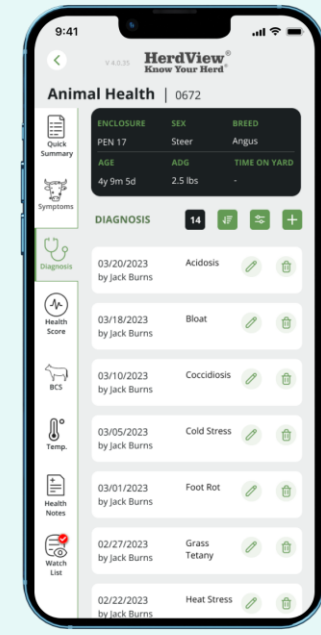
STEP 6

You will need to provide the Diagnosis Details, including the Diagnosing Party, Diagnosed Date, Comments, and Treatment Selection from the drop-down menu.
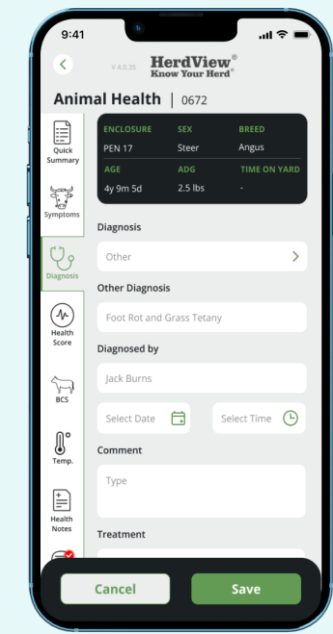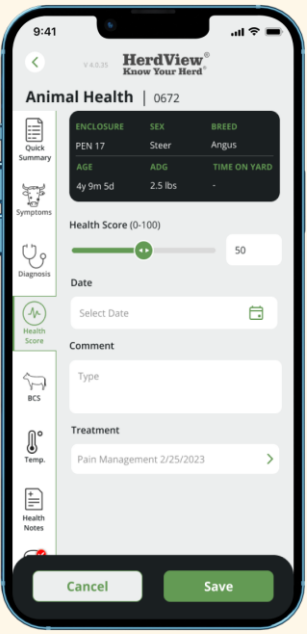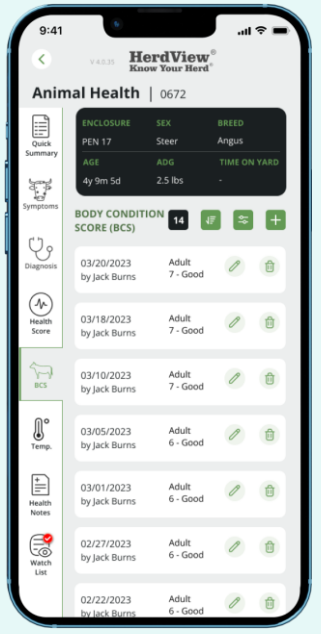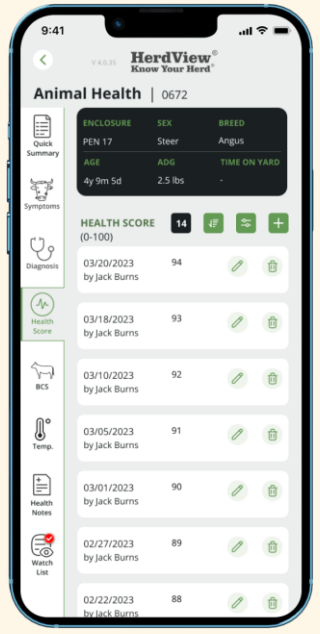
5 – HEALTH

STEP 7

After filling in each field, click **"Save"** to proceed to the **"Health Score"** section.

In the **"Health Score"** section, you will find a Health Score Summary screen. Similar to the previous sections, you can edit and delete entries directly from this summary card. To add a new health score, tap the **"+"** icon in the upper right-hand corner.

STEP 8

You will need to provide the Health Score, Specific Date, and Comments. Click **"Save"** button to update the animal's **"Health Score"** and proceed next step.

STEP 9

After filling in each field, click **"Save"** to proceed to the **"Body Condition Score (BCS)"** section.

In the **"Body Condition Score (BCS)"** section, you will find a Body Condition Score Summary screen. Again, you can edit and delete entries directly from this summary card. To add a new body condition score, tap the **"+"** icon in the upper right-hand corner.
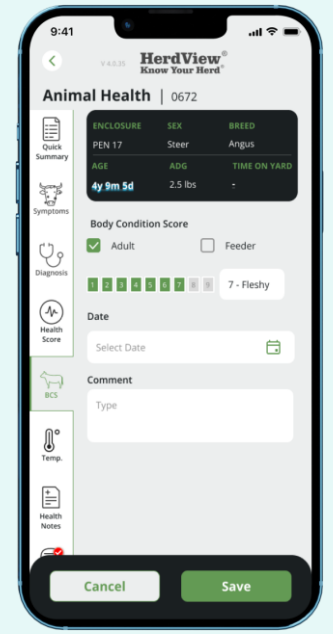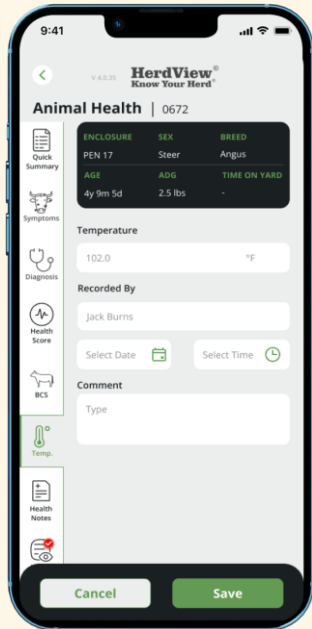
STEP 10

You will have check boxes for **"Adult"** and **"Feeder"** with corresponding score ranges. Enter the date and comments for the animal's body condition score.
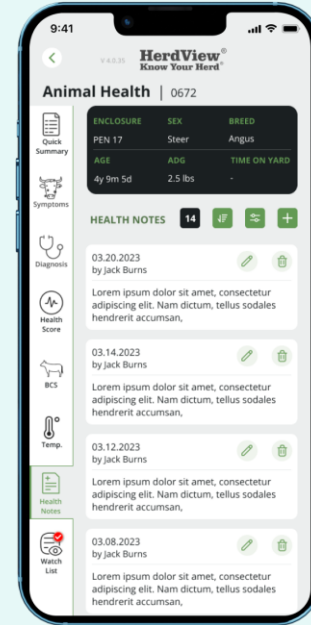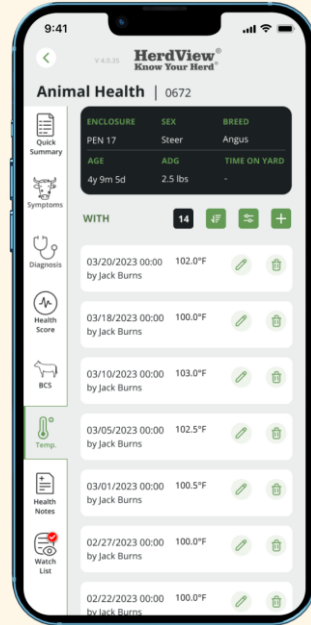
5 – HEALTH

STEP 11

After filling in each field, click **"Save"** to proceed to the **"Temperature"** section.
In the **"Temperature"** section, you will find a Temperature Summary screen. You can edit and delete entries directly from this summary card. To add a new temperature record, tap the **"+"** icon in the upper right-hand corner.

STEP 12

Enter the recorded by Name, Date, Time, and Comment about the temperature. You can also include treatment details if applicable.

STEP 13

After filling in each field, click **"Save"** to proceed to the **"Health Notes"** section.

In the **"Health Notes"** section, you will find a Health Notes Summary screen. Similar to the previous sections, you can edit and delete entries directly from this summary card. To add new health notes, tap the **"+"** icon in the upper right-hand corner.

STEP 14

Enter the notes about the health details, specific date, comments.

Once you have filled in each field and clicked **'Save'**, you will be directed to the 'Watch List' section.

5 – HEALTH
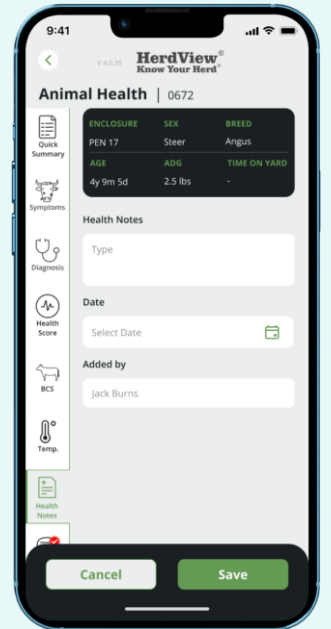
STEP 15

In the **'Watch List'** section, you will find a summary of your watch list. On this screen, you will see a Filter icon, Sort icon, number of notifications, and an add icon. Additionally, you can edit and delete entries directly from the summary card.
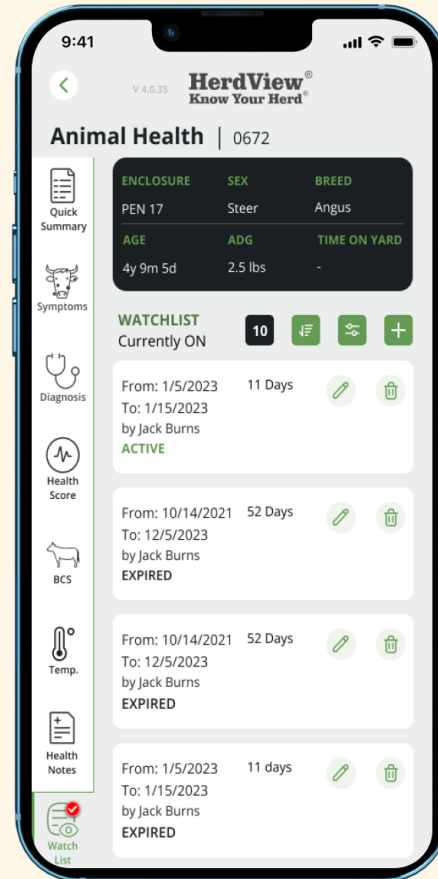
STEP 16

To add an item to your **Watch List**, tap the **"+"** icon in the upper right-hand corner. You will be presented with a toggle button for the selected animal and set the from and to dates for monitoring. You can also add comments about the **Watch List.**

Remember to save your changes after filling in each field in order to proceed with the **Watch List**.

HERD X

(833) 437-3987 | support@herdx.com
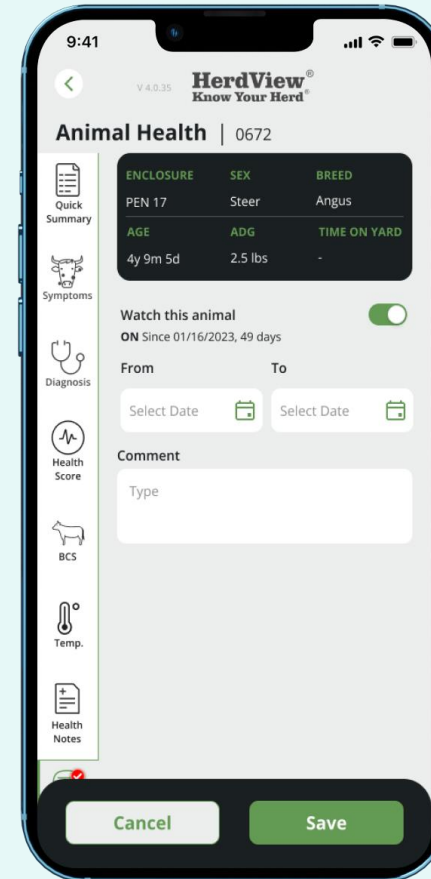
5A – BULK HEALTH

STEP 1

To apply **"Health"** records for multiple animals, follow these steps:

Navigate to a pen or pasture.

In the top right corner, click on the three dots to open the **"Quick Action"** menu at the bottom of the screen.

Look for the **"Book with plus"** text with the syringe icon and tap on it. This will take you to the **"Animal Health Bulk"** page with the Selected Animal Tab selected. We can search animals in search by tag **"Search Bar".** In that screen we can click on the check box to select animals and Uncheck the check box to unselect the **Tag ID.**
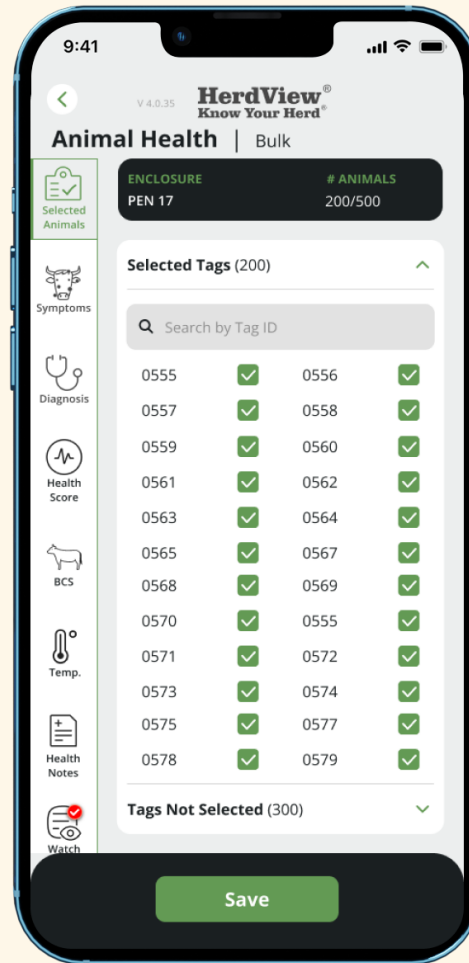
STEP 2

Click the **"Save"** button to proceed. On the animal/tag card, you will see the Selected Animal screen which displays various health-related information such as Symptoms, Diagnosis, Health Score, BCS, Temperature, Health Note, watch list, and Review & Save.

Click **"Save"** to proceed to the **"Review and Save"** section. If you try to save without adding a health record, a pop-up message will remind you to add at least one health record.
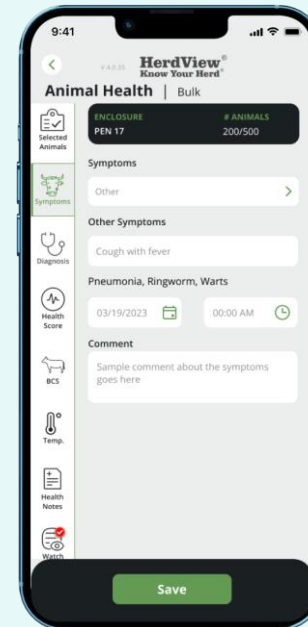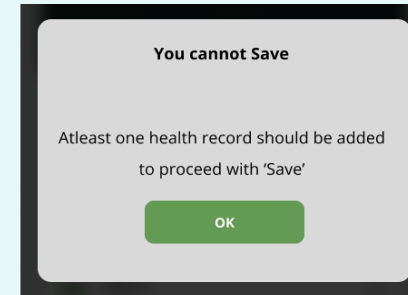
STEP 3

To access the **"Symptoms"** section, you have two options:

Click on the **"Symptoms"** option in the side tab.

In the **"Symptoms"** section, you can select symptoms, add the date and comments, and choose a specific treatment from the drop-down menu. Click **"Save"** to proceed to the **"Review and Save"** section.

5A – BULK HEALTH

STEP 4

Next, select the **"Diagnosis"** section where you can provide Diagnosis Details including the Diagnosing Party, Diagnosed Date, Comments, and Treatment selection from the drop-down menu. Click **"Save"** to proceed to the **"Review and Save"** section.
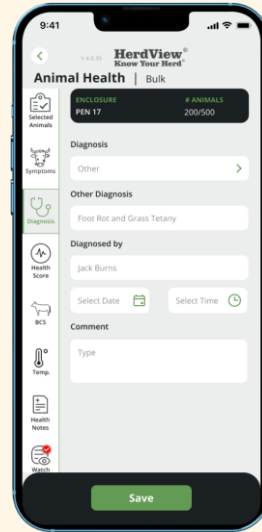
STEP 6

Now, in the **"Body Condition Score (BCS)"** section, you will find check boxes for **"Adult"** and **"Feeder"** with corresponding score ranges. Enter the date and comments for the animal's body condition score. Click **"Save"** to proceed to the **"Review and Save"** section.
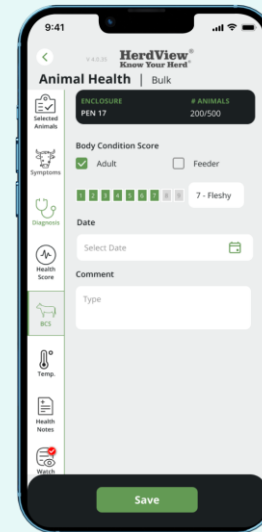
STEP 5

In the **"Health Score"** section, provide the health score, specific date, comments, and select a treatment from the drop-down menu. Click **"Save"** to proceed to the **"Review and Save"** section.
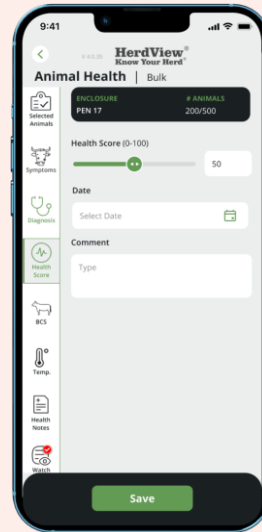
STEP 7

In the **"Temperature"** section, enter the record by name, date, time, and comment about the temperature. Click **"Save"** to proceed to the **"Review and Save"** section.

5A – BULK HEALTH

STEP 8

In the **"Health Notes"** section, enter the notes about the health details, specific date, comments, and select a treatment from the drop-down menu if needed. Click **"Save"** to proceed to the **"Review and Save"** section.
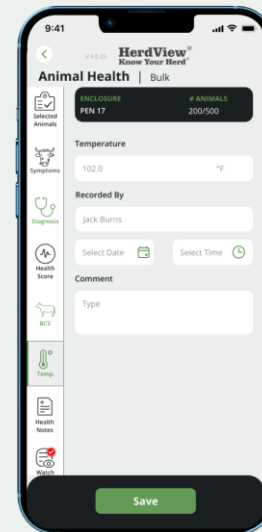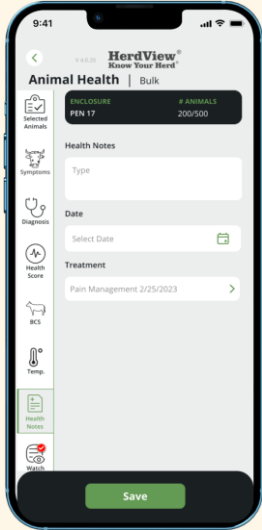
STEP 10

After completing the Watch List section, you will encounter the **"Review and Save"** option for all the tabs you have entered. It is important to carefully review the **"Bulk Health"** information you have entered before proceeding.
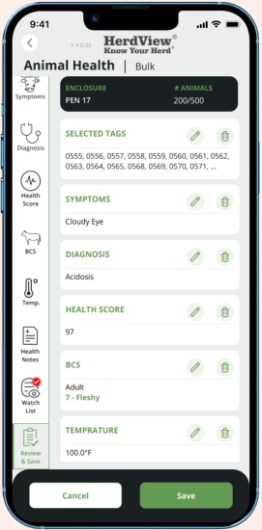
STEP 9

Now, in the **'Watch List'** section, you can select the specific animal, set the from and to dates for monitoring, add comments. Click **"Save"** to proceed.
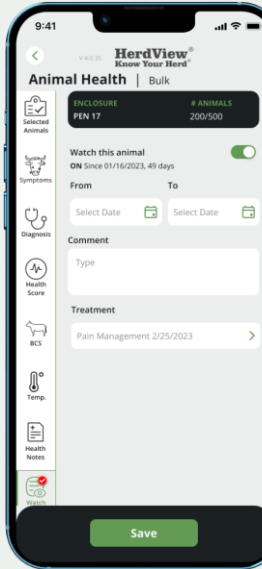
STEP 11

Once you click **"Save",** a popup notification will show that the health details will be added for the selected animals. You will have the option to click **"Cancel"** to go back and edit or proceed with **"Save".** If you choose to save, a popup confirmation screen will appear, and after clicking **"Save",** you will be redirected to the pen screen with a popup message at the bottom confirming that the **"Health Details has been added for the animals Successfully".**
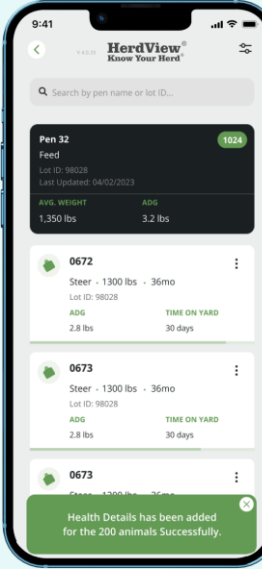
6 – SETTINGS & NOTIFICATIONS

6A – NOTIFICATIONS

In this section we'll cover navigating your available settings, exporting information to CSV files and how to view notifications. We will also show you how to switch your location site inside the app with your main **HerdView®** account.

To find your settings, tap the **"three dots"** button in the upper left-hand corner.

Notifications:
At the top right hand of the screen you will see a **"bell"** icon. If you tap this you will be taken to screen that shows notifications. If you don't see any you will see a message **"You are up to date. You don't have any notifications."**
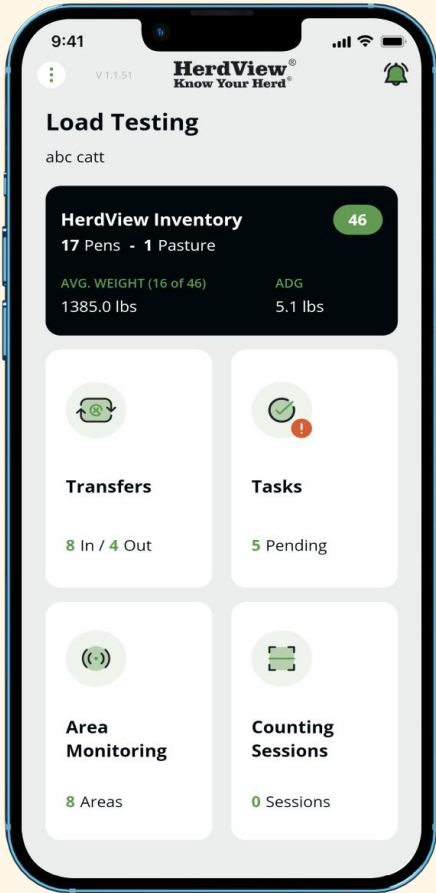
"Notifications" are provided for **"Treatments, Transfers, Tasks, Area Monitoring"**.

Initially, you will see **"Treatments"** notifications. These notifications will alert you of any changes in your condition or treatment. You can also view notifications for test results, medication reminders, and other topics related to animal health. You can also access other tabs by clicking the next topic.
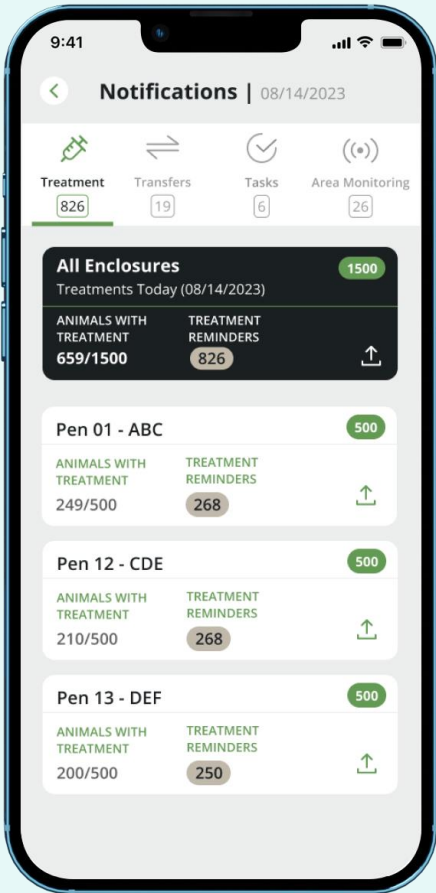
6A – NOTIFICATIONS

Next, you will see animal transfer notifications. These notifications will notify you when animals are transferred to you. They will also notify you when animals are transferred to another location. In addition, you have a list of accordions to choose which transfer details you need. The notifications will also include the details of each Incoming and Outgoing transfer, such as the date, location, and any other relevant information. This information can be used to track the movement of animals and provide critical animal information and help manage your operations more effectively and efficiently.

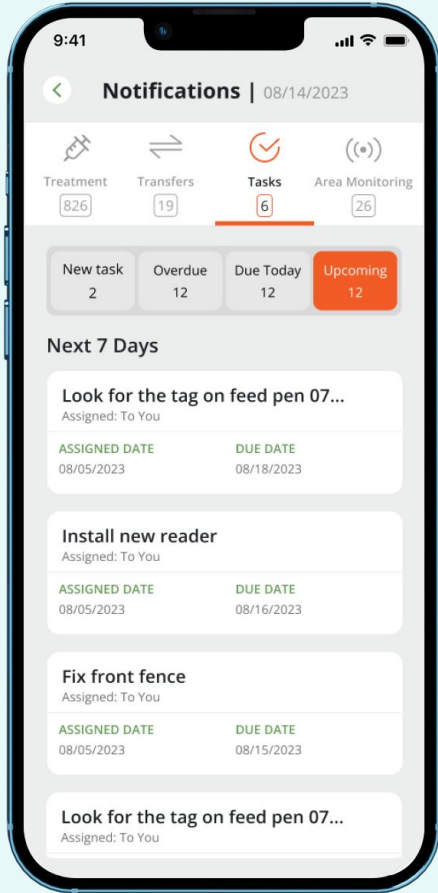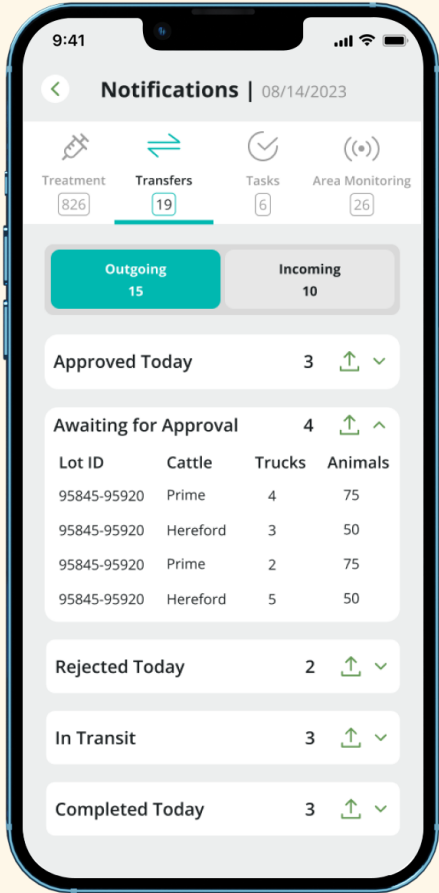The next step is to view task notifications. In the **"Task"** list, You can view overdue tasks, tasks that are due today, and tasks that are upcoming. You can also view tasks that have been marked as completed and those tasks that are still pending. The task list also allows you to view tasks that have been assigned to specific employees and their status. Finally, the task list provides insights into task completion rates across employees.
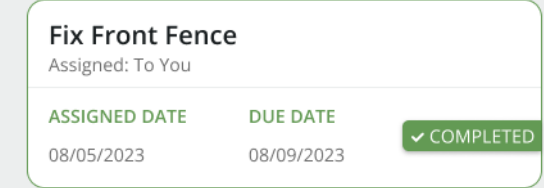
6A – NOTIFICATIONS
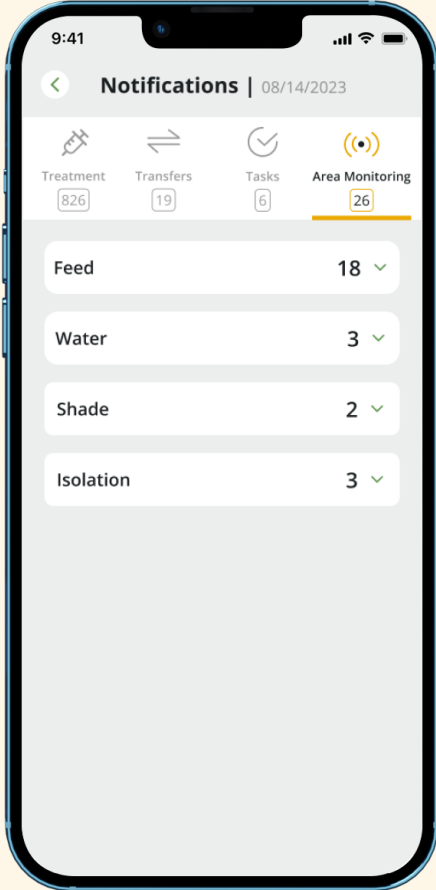
To continue, Here you can also access **"Area Monitoring"** notifications. These notifications can be viewed on a pen-by-pen basis. On the pen card, you have the option to review previous notifications as well as those from the past 24 hours. Additionally, you can check notifications from the animal area monitoring system. The notifications are conveniently organized by feed and water, and you can even create new area monitoring categories with custom names for easy and efficient review in the Area Monitoring functions of the app.
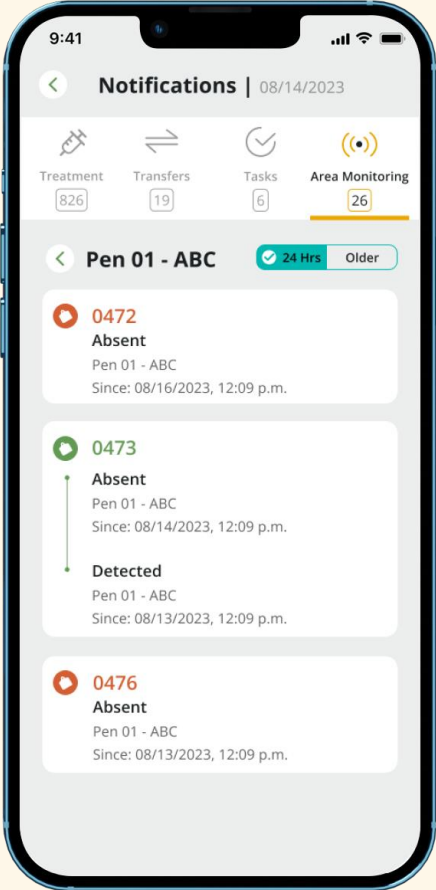
6A – MAIN SETTINGS

Select **'Settings'** with **"gear"** icon from the pop-up menu.
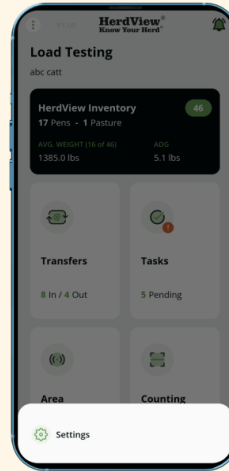
On the **"Settings"** screen you will have three options:

- Organization
- Manage Sites
- Data Management
- Export Data (CSV)
- Logout

These options will be discussed further.

To logout of the application, scroll to the bottom of the **"Settings"** screen and tap the **'Log Out'** letters in green.
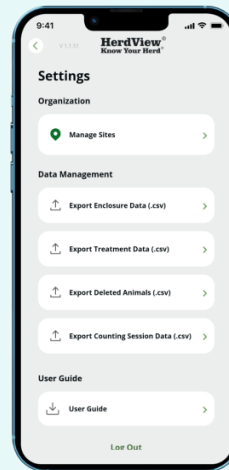
6B – EXPORT DATA TO CSV
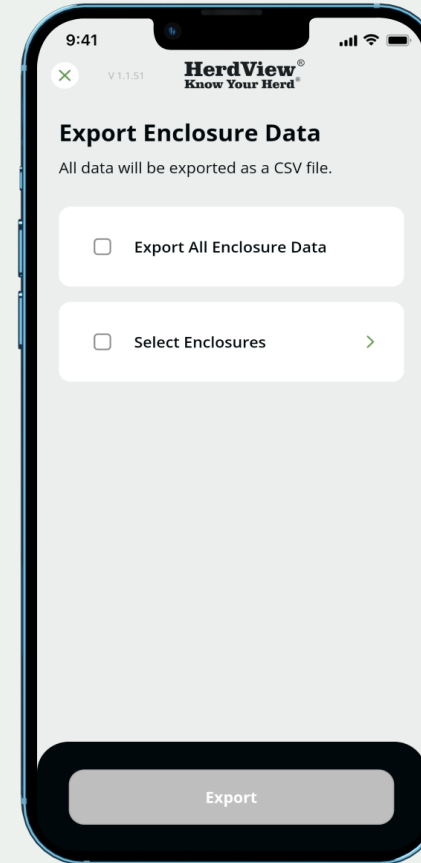
To export inventory data to a CSV fie, tap **"Export Data "** from the main **"Settings"** dashboard, under the **"Data Management"** category located in the lower half of your screen.

You will then see this page that gives you the option to export all pen data, or only data from select pens. the different export options are Enclosure, Animal Details, Treatments, Deleted Animals, and Counting sessions.

Make your selection and then hit **"Export"** at the bottom of the screen.

6B – EXPORT DATA TO CSV

If you are selecting Pens or Pastures, you will then see a screen allowing you to select the pens you'd like to export to CSV.

You will also be able to search by Enclosure in the top search bar. Once you've selected pens or pastures for export, tap the green **'Add # Pens or Pastures'** button.

Hit the **"Export 'n' Enclosures"** at the bottom of the screen you will be taken back to the previous screen where you will view the following:

The Pen and or Pasture names will be listed under **"Enclosures to Export"**

If the selections are correct hit **"Export"** to move forward.

You will get a message at the bottom of the screen. the **"CSV"** file will be emailed to the you.

Here is an example of what your CSV file will look like after export. This file will include:

- Organization
- Location/site
- Enclosure
- Animal ID
- Secondary ID
- Lot ID
- Sex
- Breed

- Dam
- Sire
- Date of Birth
- Age (at time of export)
- Time on Yard/Ranch (at time of export)
- Weight (at time of export)
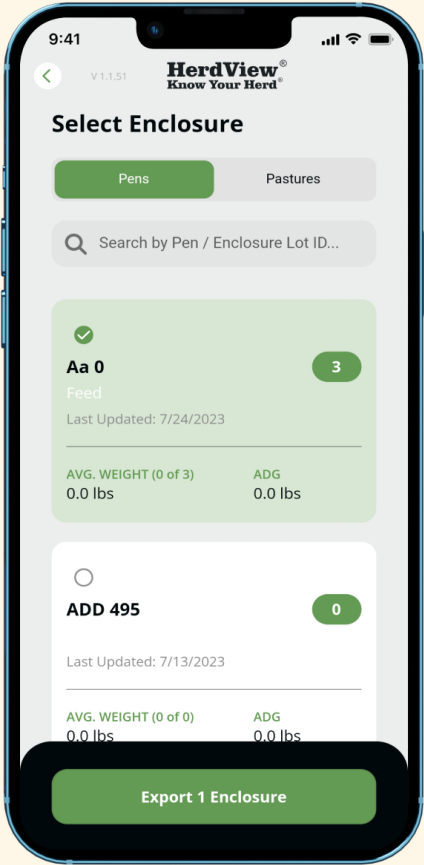- Receiving Date
- Purchase Date

Pen Export_(MM-DD-YYY)

Enclosure	Animal ID	Secondary ID	LOT ID	Sex	Breed	Dam	Sire,	Birthdate	Current Age (Months) as of Export Date	Time on Yard	Current Weight (lbs)	Treatment History (Only type not frequency)
Pen 1	999117429140801	5108	L3423	-	No Breed	No Dam	No Sire	No Birthdate	No Current Age	31 days	0	Vision 8 Somnus with Spur; Vista 5 SQ
Pen 1	999117429140802	5109	L3423	-	No Breed	No Dam	No Sire	No Birthdate	No Current Age	31 days	0	Vision 8 Somnus with Spur; Vista 5 SQ
Pen 1	999117429140803	5110	L3423	-	No Breed	No Dam	No Sire	No Birthdate	No Current Age	31 days	0	
Pen 1	999117429140804	5111	L3423	Steer	Hereford	No Dam	No Sire	8/16/19	33	31 days	453.59	
Pen 1	999117429140804	5112	L3423	-	No Breed	No Dam	No Sire	No Birthdate	No Current Age	31 days	0	Vision 8 Somnus with Spur; Vista 5 SQ; Vira Shield 6 + VL5
Pen 1	999117429140805	2435	L3423	-	No Breed	No Dam	No Sire	No Birthdate	No Current Age	31 days	0	Vision 8 Somnus with Spur; Vista 5 SQ; Vira Shield 6 + VL5

6C – CHANGING SITE LOCATION

To change site locations, begin by navigating back to the main app dashboard and tapping the same **'three dots'** button in the upper left hand corner and tap **'Settings'** from the pop-up menu.
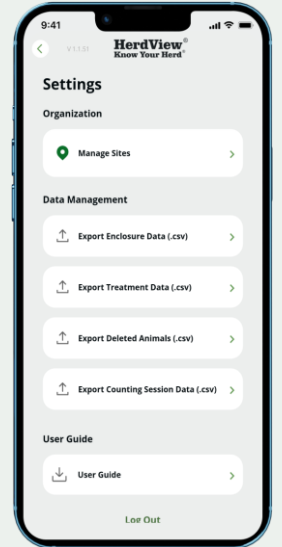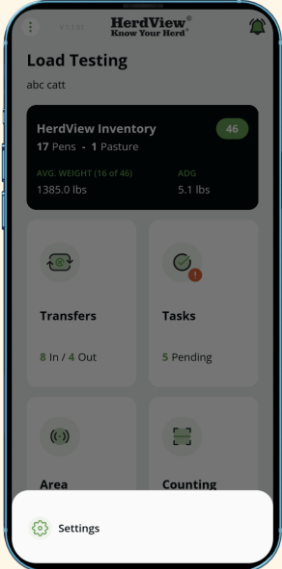
Now that you are on the **"Settings"** page, tap the **'Manage Sites'** box.
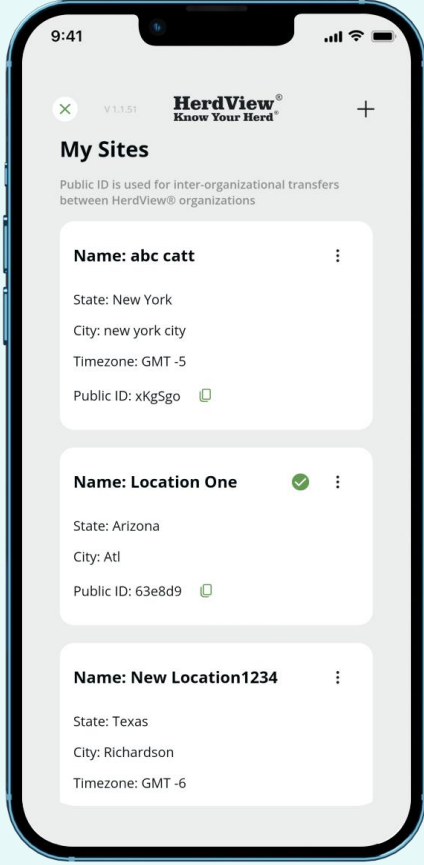
To change site locations, tap on the site you'd like to choose. It will be marked by a **"green checkmark"** in the upper right-hand corner of the card (as pictured).

To add a new site, tap the **'+'** in the top right-hand corner.

7– COUNTING SESSIONS

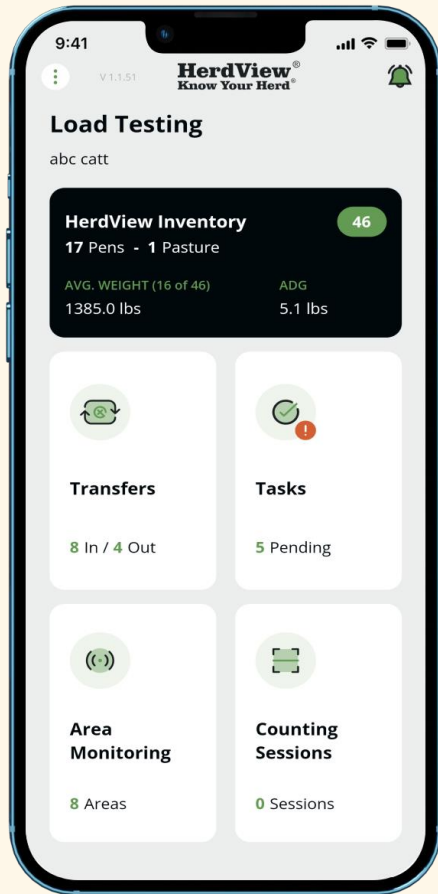The **HerdView® App** comes with a **"Counting Session"** feature that will help you quickly and effectively count and manage your animals. Please note, you must have already added animals to inventory before they can be counted.

Begin by navigating to your **"Home"** page main dashboard. Tap on the **'Counting Sessions'** card in the lower right-hand corner.

On this card , at the bottom you will see the number of counting sessions **('Sessions")** performed.

Add Counting Sessions Using HHR- Click Here ➤

7A – NEW COUNTING SESSION
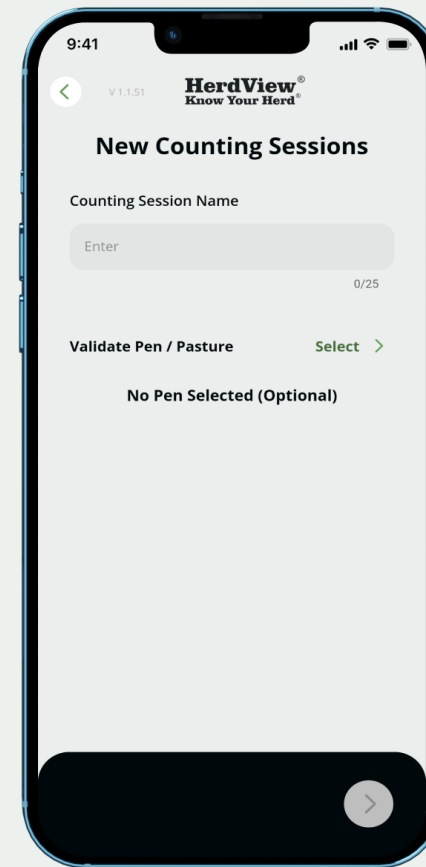
Enter a **"Name"** for your **"Counting Session Name"** and press the **"Green Arrow"** in the lower right-hand corner to continue. You can name each session whatever you'd like, there is no set format for naming a Counting Session.

However, the **HerdView® App** will automatically assign a six-digit identifier code to each session in order to differentiate individual counting sessions more easily in the system.

You'll also see a field for selecting a Pen or Pasture to validate, this field is optional and can be left empty for your counting session.

7A – NEW COUNTING SESSION
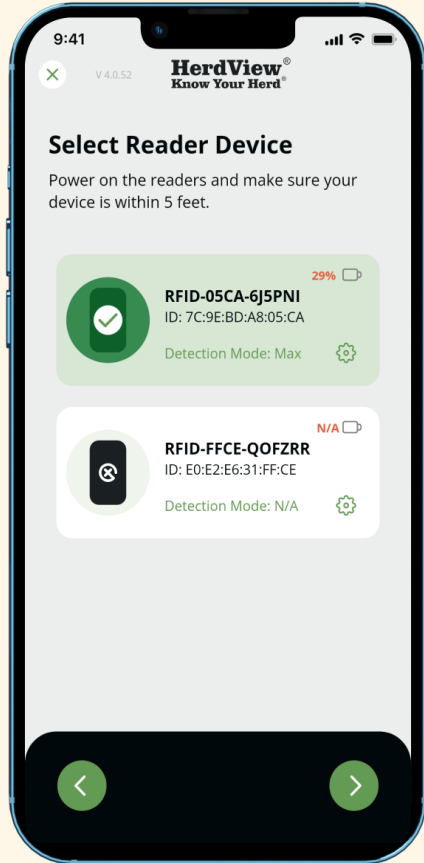
On the next page, tap to select a **"**On the next page, select the **"HerdView Reader" scanning method"** (or multiple readers). Make sure your reader is powered on and in range. Your phone's Bluetooth feature and location must be turned on as well – you can check your phone's settings to ensure they are on.

Check to ensure each reader is set to the required range. If you need to change a reader's range, tap the **"gear"** icon to change your reader's setting.
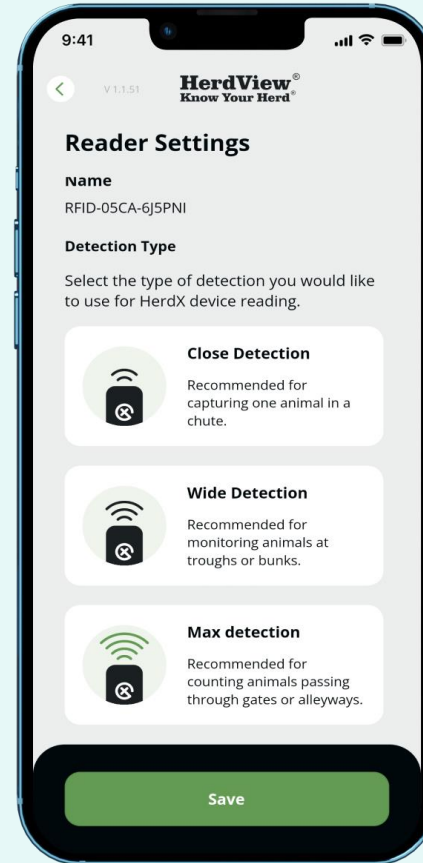
You can now select which scanning range configuration works best for your needs. Your range choices **("detection")** include the following:

• **"Close Detection"** – choose this option for chute side scanning sessions.

• **"Wide Detection"** – choose this option for area monitoring, such as over water troughs.

• **"Max Detection"** – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates and alleyways.

Tap **'Save'** to set your preferred reader range.

7A – NEW COUNTING SESSION
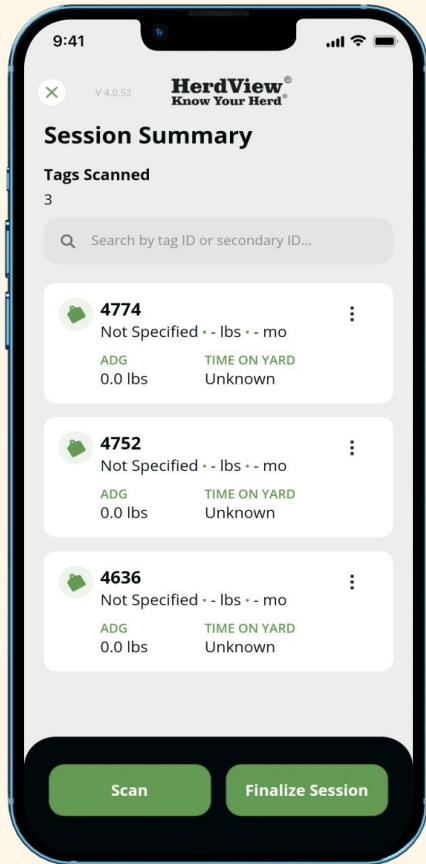
After selecting your reader and appropriate read range, tap the green **'Scan'** button to begin scanning tags.

You can tap the green **'Finalize Session'** button at any time to complete the session - see the following pages.
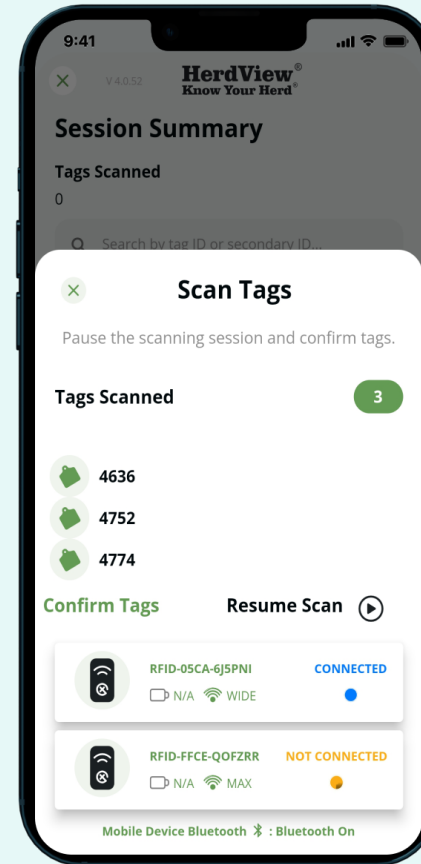
Once you've begun your counting session, you'll see tags appearing in a list as they are scanned.

If tags are being scanned, you will see **"Scanning"** in the lower right-hand corner next to the **"Pause"** button.

Tap the small pause button to pause a counting session at any time and tap the small play button to resume counting.

To end a counting session, tap the "Pause" button, then tap **'Confirm Tags'** to review your **"Session Summary"** on the next page.

7A – NEW COUNTING SESSION
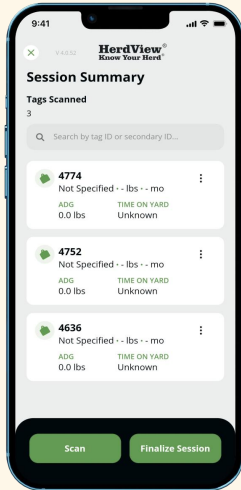
The **"Session Summary"** will list each tag scanned in your session, with each animal tag ID displaying individual information if it is listed.

If you need to remove an ID from a counting session, tap the **"three dots"** in the corner of the ID card and tap **'Remove from Session'.**

To save your Counting Session, tap the green **'Finalize Session"** button at bottom of screen.
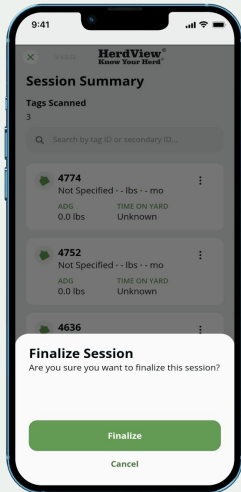
Confirm by tapping **'Finalize'** when prompted by the resulting pop-up screen.

If you hit **"Cancel"** you will stay on the **"Finalize Session"** screen where you can scan more tags or remove tags that were already scanned.

Your scan will now be listed on your **"Counting Sessions"** dashboard.

Please note you are always able to go edit the title of a counting session, or delete sessions, by tapping the **"three dots"** in the corner of each counting session card.

To view a previous counting session, tap the applicable card. You'll see each tag from the scanning session listed with any added information displayed for each ID number.

You can also delete all counting sessions. Just hit **"Delete All Counting Sessions"** at the bottom of the screen.

7B – VALIDATE A COUNTING SESSION PEN COUNT
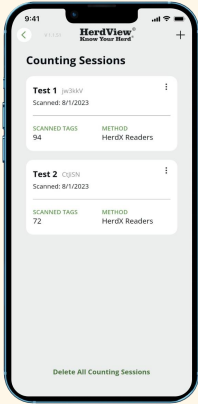
To validate the animal count for a pen or pasture, begin by tapping the **"Counting Sessions"** card from your main dashboard, then tapping the **'+'** symbol in the upper right-hand corner.

Name your counting session just like you would normally, then select a Pen or Pasture from the field below. Tap the **"green arrow"** to continue.

During the counting session process, if you select a pen to validate and have accidentally selected the wrong pen, you can go back and chnage the pen. Just hit **"Change >"** in the right hand corner above the top animal ID. Follow the steps and problem solved!
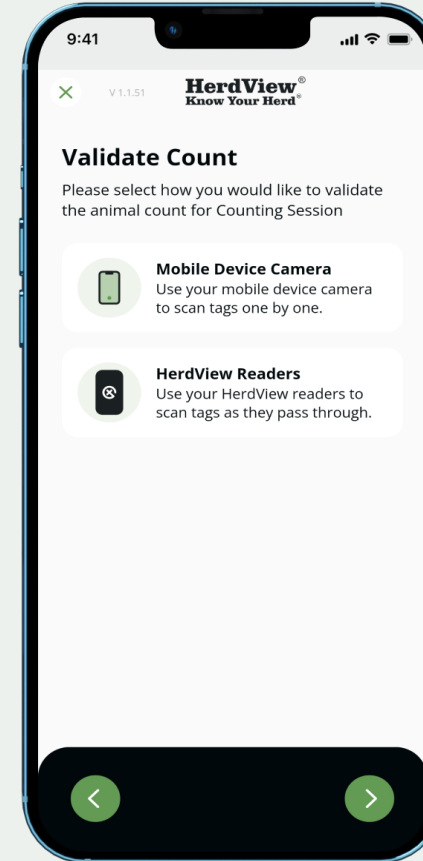
You are ready to start the counting session.

First, you will need to select **"HerdView® Reader"** as your method of counting.

Then just tap the **"green arrow"** at the bottom to continue.

7B – VALIDATE A COUNTING SESSION PEN COUNT
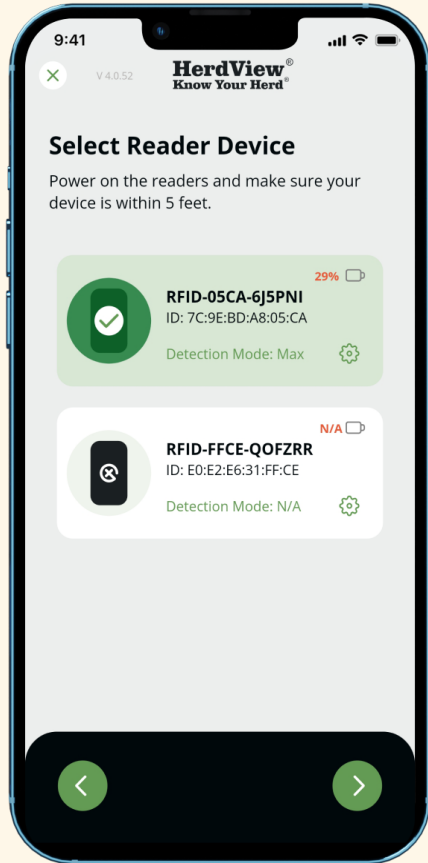
On the **"Select Reader Device"** screen you will be able to select a reader or multiple readers. Make sure your reader is powered on and in range. The battery status of the reader device will be displayed at the top right corner of the card. Your phone's Bluetooth feature and location must be turned on as well - you can check your phone's settings to ensure they are on. Check to ensure each reader is set to the required range.

If you need to change a reader's range, tap the **"gear"** icon to change your reader's setting. See the previous section on counting sessions for reader range descriptions. Once you've selected your reader, tap the green arrow in the bottom right corner to continue.
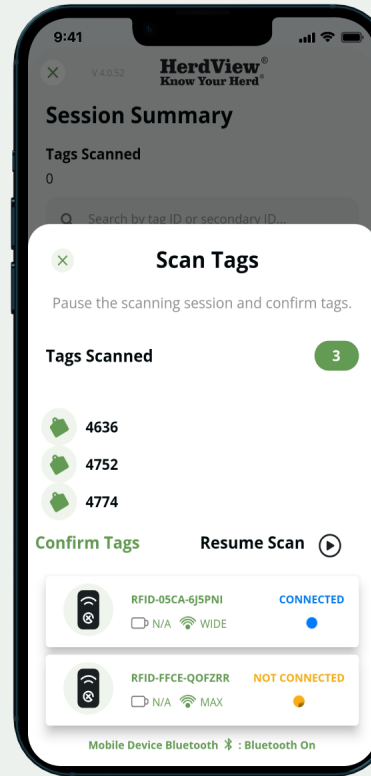
Just like the instructions for when you initially started scanning tags for the counting session, use the **"Pause / Play Buttons"** to stop or resume your counting session.
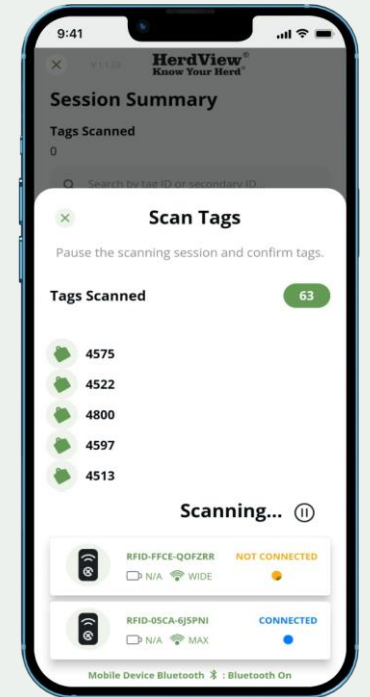
Tap the **"Pause"** button and hit '**Confirm Tags**' to continue.

7B – VALIDATE A COUNTING SESSION PEN COUNT
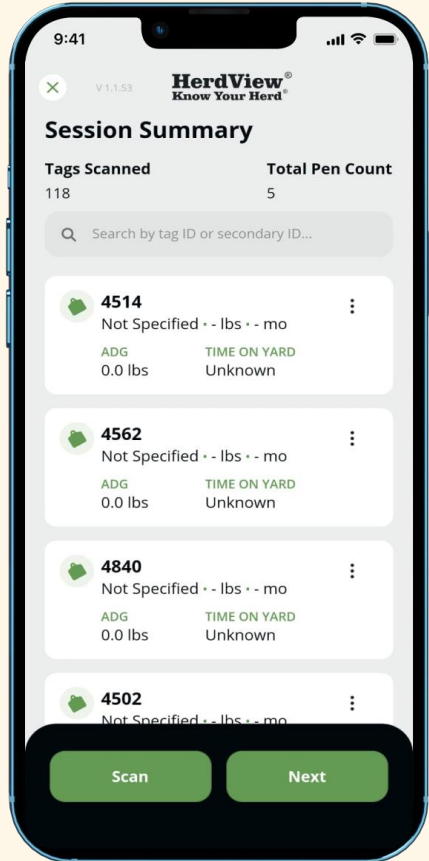
When validating a Pen Count, you'll see the number of animals currently counted and the number that have been counted in the upper-left hand corner **("Tags Scanned")**. Ideally, these numbers will be the same once the scanning session is complete. If needed, you will have an opportunity reconcile and resolve any differences.

Tap **"Next"** to continue.

"Missing" tags are tags that should have been scanned but did not show up in the count.

"Unexpected" refers to a scanned animal tag that is assigned to a different pen but was scanned in the selected Pen being counted.

Any tags that are missing from the validation count can be moved to a different pen in the application or a tag(s) can be removed from the counting session. Just tapping the animal ID card and select your option.

7B – VALIDATE A COUNTING SESSION PEN COUNT
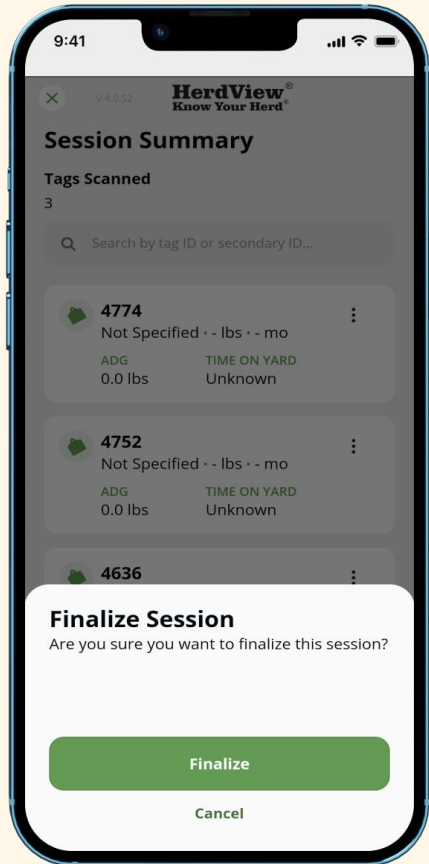
8– AREA MONITORING

Once you have resolved the missing tags and/or unexpected tags (as noted on the previous page), if any, continue to the **"Session Summary"** and tap **'Finalize'** to save your pen validation count.

You can always cancel the session by hitting **"Cancel"** at the bottom of the screen. Canceling will take you back to the session summary to review the tags that were scanned.

If you finalize, this session will now be listed in your **"Counting Session History"**.
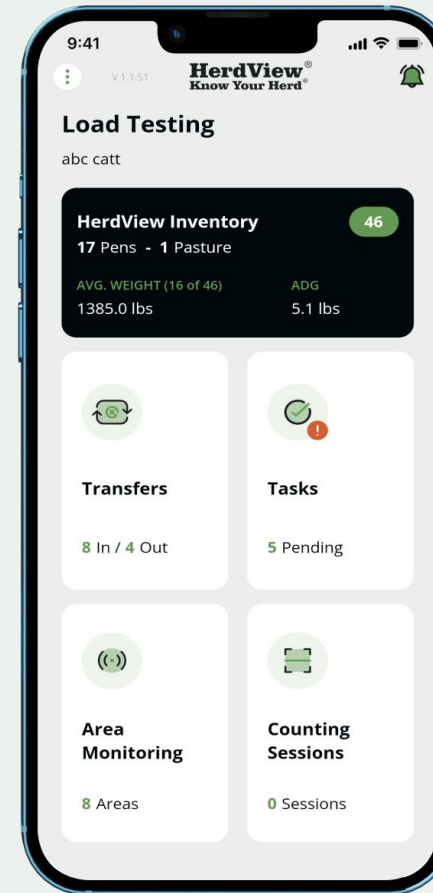
Used in conjunction with your **HerdView® Smart Readers**, area monitoring provides insights into animal behavior and alerts you when cattle aren't coming to water or feed. To begin, start from your main dashboard and tap the **"Area Monitoring"** card in the lower left-hand corner.

8A – AREA MONITORING
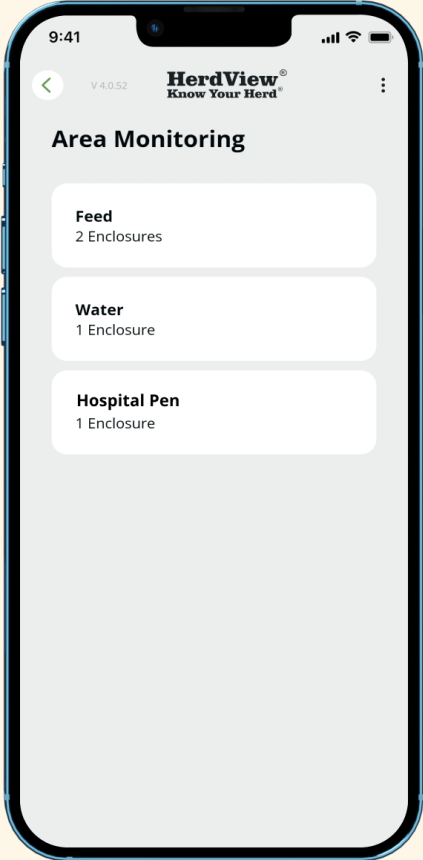
Your Area Monitoring dashboard will display areas based on category, including water and feed.

These sections will display activity summaries from all the pens assigned to that category. You can also add custom category types to suit your needs, such as shade, sick pen, hospital pen, etc. (Instructions on adding a new monitoring area are located further in this section.)
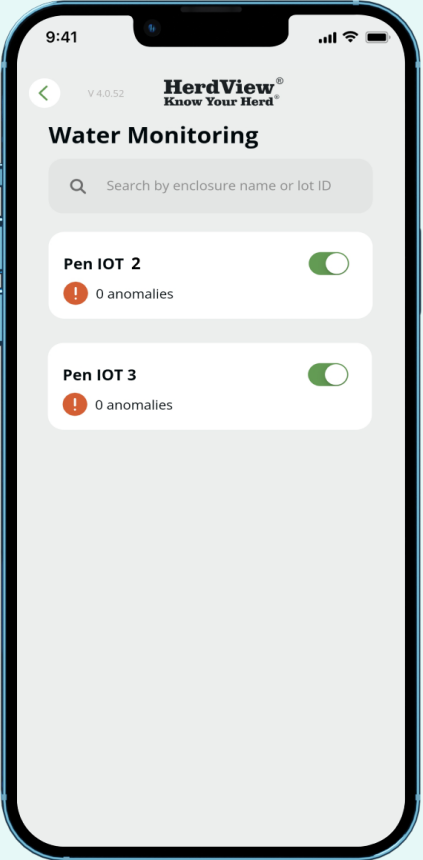
When opening an Area Monitoring type **(water, feed, etc.)** mentioned on the previous page, the app will list all the enclosures monitoring that type.

For example, in the image shown on the left, there are two pens monitoring water. If the enclosure has alert activity in the last 24 hours, the anomaly count will update to reflect the number of new absences and detection alerts. You can click on the enclosure to view the list of new and old alerts for that specific enclosure.
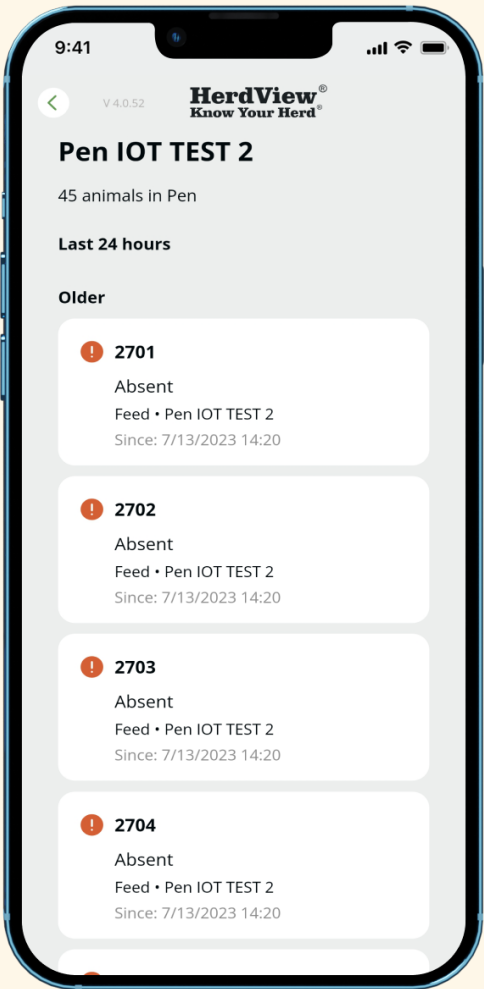
"Last 24 Hours"
If an animal has been identified as **"Absent"** from the area being monitored during the last 24 hours, an alert will be triggered. It will include a date and time stamp.

If the animal then appears again at the area a **"Detected"** alert will then be displayed on the card for the specific animal. It will include date and time stamp.

For example, on the screen to the left animal 2701 in Pen 16 triggered an absence alert, however it appeared again the next day and is now shown in a new alert as detected.

This screen will also display **"Older"** alerts. This section is for open alerts beyond the most recent 24-hour period displayed in the **"Last 24 Hours"** section.

"Alerts" will trigger a notification that will be seen on the **"Notifications"** screen discussed in Section 6A - Notifications.
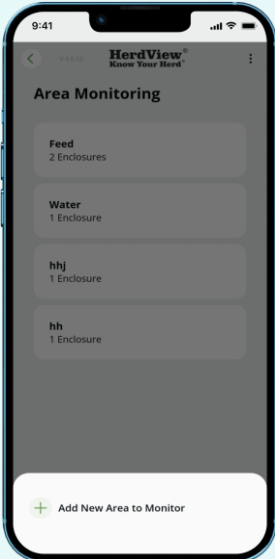
To add a new monitoring area, tap the three dots from the main monitoring area dashboard. You will then see a menu bar pop-up with the option to **'Add New Area to Monitor'**.
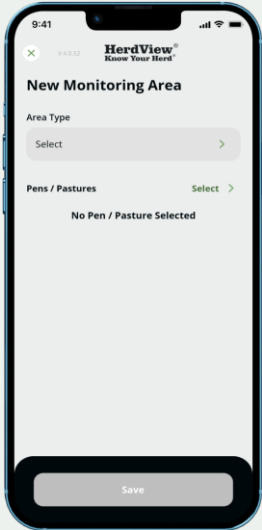
Select which **"Area Type"** you'd like to create.

8B – NEW MONITORING AREA
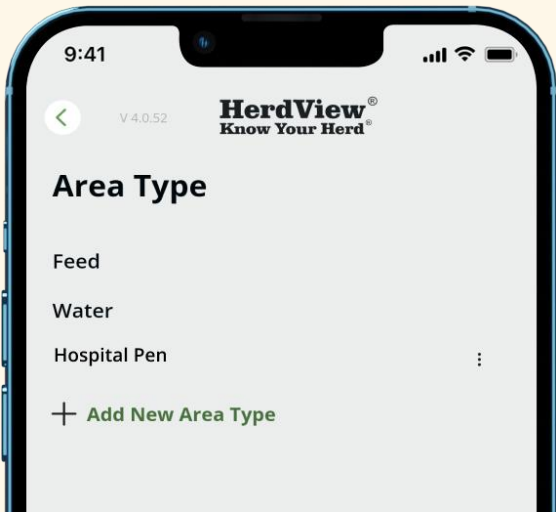
The default **"Area Type"(s)** are Water and Feed. You also have the option to create a custom area type.

You will now be able to select the area type you'd like to add. Tap the **"white arrow"** in the upper left-hand corner to return to the new area form.

To edit and/or delete your custom area types, click on the **"three dots"** menu next to the custom area type.

If you are adding a custom field, add your custom name into the field and hit the green check mark to successfully add a custom area type. The **"X"** icon will cancel the new area type.
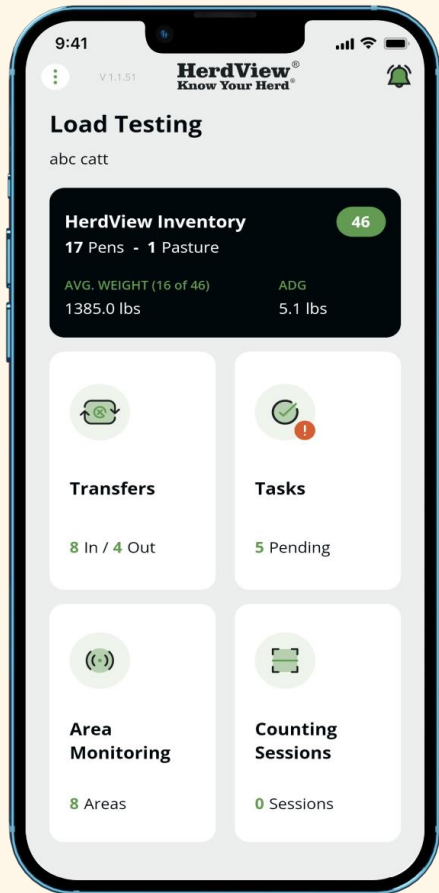
9 – TASKS

To see your current tasks and/or add new ones, tap the **"Tasks"** card from your **"Home"** page dashboard.
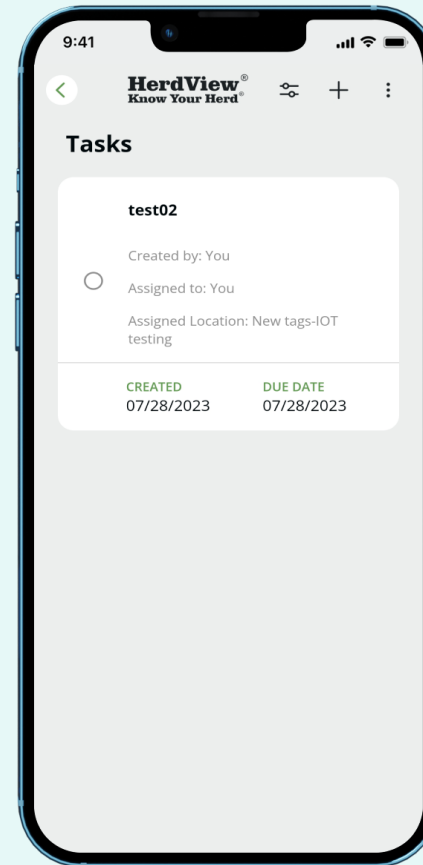
Before we get started on creating a new task, let's review a few other features with tasks.

You can sort or filter tasks. Just tap on the **"sort/filter"** icon (two lines with circles) in the upper right-hand corner. You will be taken to another screen (not shown here).
You can then sort by the following:
Due Date - Ascending and Descending
Date Created - Ascending and Descending
You can filter by **"Assigned"** person.
If you need to redo the selections just hit **"Clear All"** in the top right-hand corner.

At the bottom of the page, you will see a green box with message **"Show All Results"**. Hit the green box and you will be taken to previous task list screen.

9A – CREATING NEW TASKS
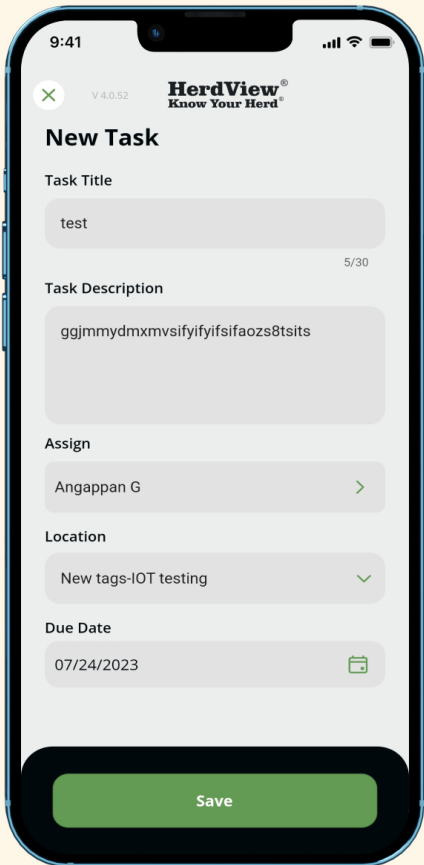
Now to creating a new task...just tap the '+' icon in the upper right-hand corner.

On the **"New Task"** page, give your task a title and a description. You can also assign someone to the task and set a due date.

Hit the green **'Save'** button to create the new task.

9B – EDIT AND DELETE TASKS
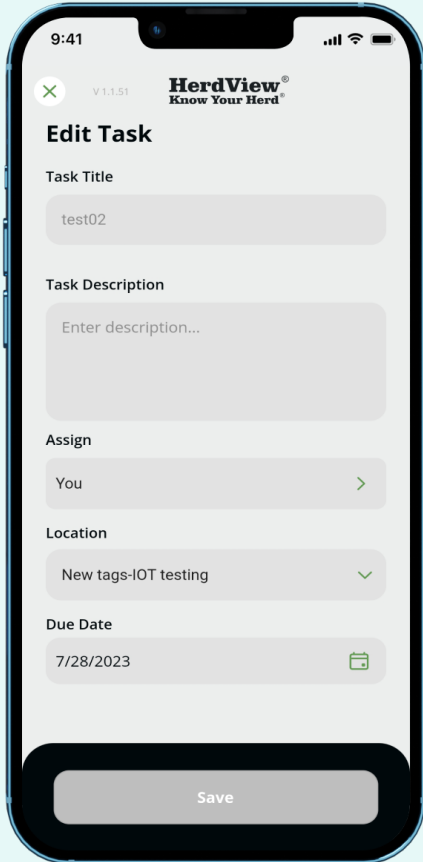
To edit an existing task, tap on the task card. Tap the **'three dots'** in the upper right-hand corner, then select edit.

You will be able to edit the tasks fields – it will look the same as the fields you complete when creating a new task. Be sure to hit **"Save"** after you are done.

9C – COMPLETING TASKS

10 – TRANSFERS
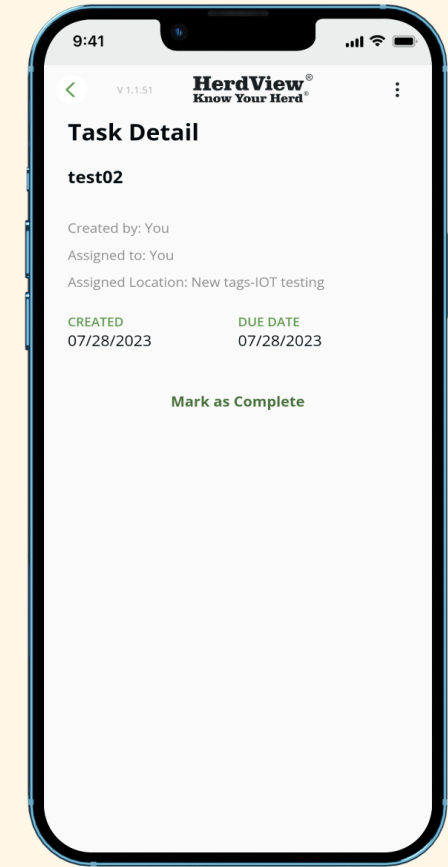
To mark a task as complete, tap an individual task. Tap the **'Mark as Completed'** letters in green. The task will then be crossed out as shown on the screen. To reverse a completed task back to an incomplete task, tap **'Mark as Incomplete'**.

It should be noted that at this time , when a task has been designated as **"Mark as Completed"**, when you select the filter/sort function (noted on previous page), all tasks with designation of **"Mark as Complete"** will be shown on filter/sort list with a line (-------) through the **"Task Title"** and will not be removed from the screen.

To remove a completed task from the listing of tasks, you should delete the task (see the previous page for instructions on how to delete a task). This should be done after the task is completed in order to reduce number of tasks remaining on the task list.
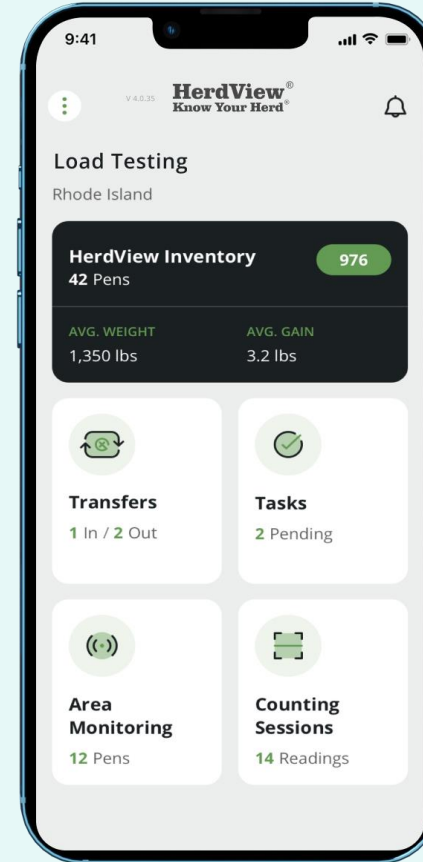
In this section we'll cover how to manage incoming and outgoing animal transfers, including creating and approving transfers. To begin, tap on the **"Transfers"** card from your main app dashboard

On this main **"Transfers"** card you will see **"1 In/2 Out"** below **"Transfers"**. These numbers represent the number of transfers out and number of transfers that have been initiated that are included in the **"View All Incoming History"** and **"View All Outgoing History"** screens.

Add Transfers Using HHR- Click Here ❯

In your Transfers dashboard, you'll see the option to toggle between **'Incoming'** and **'Outgoing'** transfers. You will also see transfers categorized as **'Need to Approve'** and **'Shipped From'**.

When you click on **"Incoming"** at the bottom of the next page you can click on **"View All Incoming History"** and you will be taken to a screen that will show you all the transfers created including certain high-level detail about the transfer. From there you can follow the steps on page 111.

When you click on **"Outgoing"** you will see at bottom of the next page **"View All Incoming History"**. Click on that and you will be taken to a screen that provides more detail about the transfer. However, no actions can be taken from this detail page.

Incoming transfers must be approved (and processed) before being added to your HerdView® Inventory.

To approve an incoming transfer, from the previous page, select **"Incoming"** card which will show you all **"In-Process"** transfers. Pick the applicable transfer and click on the card. From here you'll see the transfer details such as ship form, number of trucks and animals, as well as list of all of the animal IDs included in the transfer. Tap the green **'Accept'** button and confirm on the following page that you are accepting the transfer.

The receiving organization for the incoming shipment has the option to accept of reject. If they reject the **"New Incoming Shipment"** they will hit the **"Reject"** tab at the bottom of the page.

If the **"New Incoming Shipment"** is rejected, an email notification will be sent to the organization shipping the animals advising of the **"Rejected"** status. Once rejected, the shipment will no longer be visible as an open transfer in that organization.

10A – INCOMING TRANSFERS
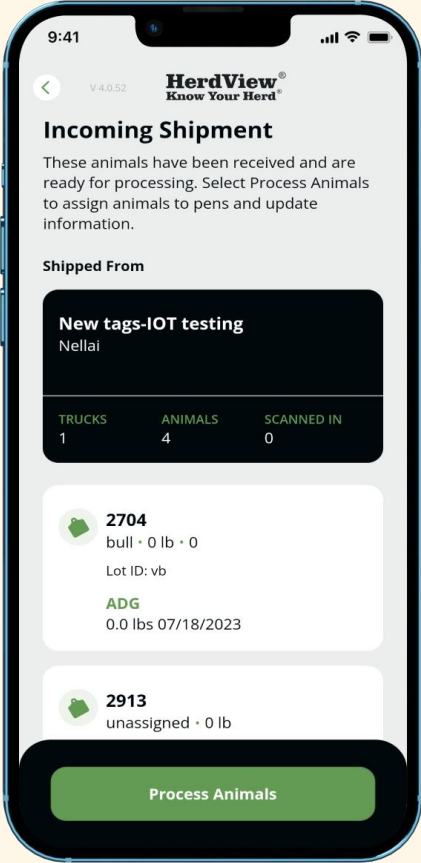
When you are ready to process an incoming shipment (for example, once an approved transfer arrives at your lot), find and tap the **"Transfer"** on the dashboard. Then tap on **"Incoming"** which will show you all **"In Process"** transfers. Pick the applicable transfer and click on the card.

Review the **"Incoming Shipment"** details. Then tap the green **'Process Animals'** button to begin. Remember, it is not until you have approved and processed an incoming shipment that the animals will be added to your inventory.
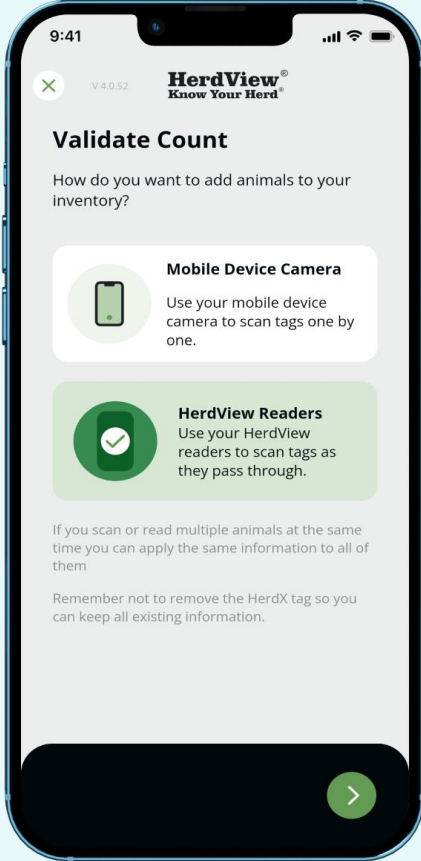
Next, you'll be given the option to validate the count of the incoming transfer. This workflow is the same as Adding to Inventory (covered in Section 2). You can choose to scan tags through a **"Mobile Device Camera"** using **QR codes or using the "HerdView® Readers".**

Continue through the pages to select common information, identical information, and to start scanning.

10A – INCOMING TRANSFERS
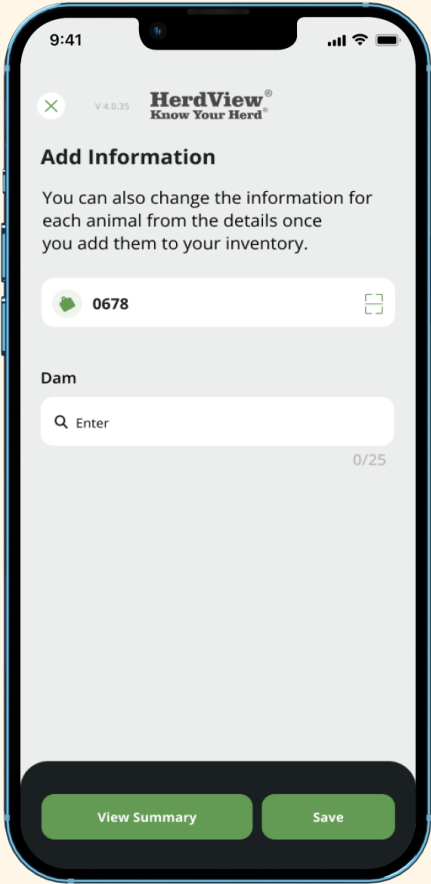
Here you can **"Add Information"** on the animal. Once you have added the necessary information and are ready to complete the session, tap the white **'View Summary'** button. Be sure to tap the green **'Save'** button before navigating to the next animal.

Note that you can also change the information for each animal from the animal details once you add them to inventory from the animal card edit function.
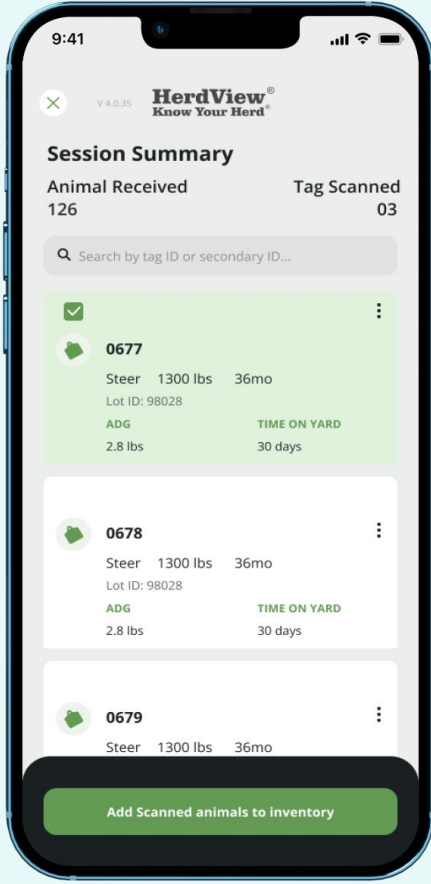
You are now at a point where you can review the session and make any needed edits before adding the scanned animals to Inventory. To make edits, tap the **"three dots"** in the upper right-hand corner of an animal ID card. Once you are ready to add to Inventory, tap the green **'Add Scanned Animals to Inventory'** button, and confirm.

10A – INCOMING TRANSFERS
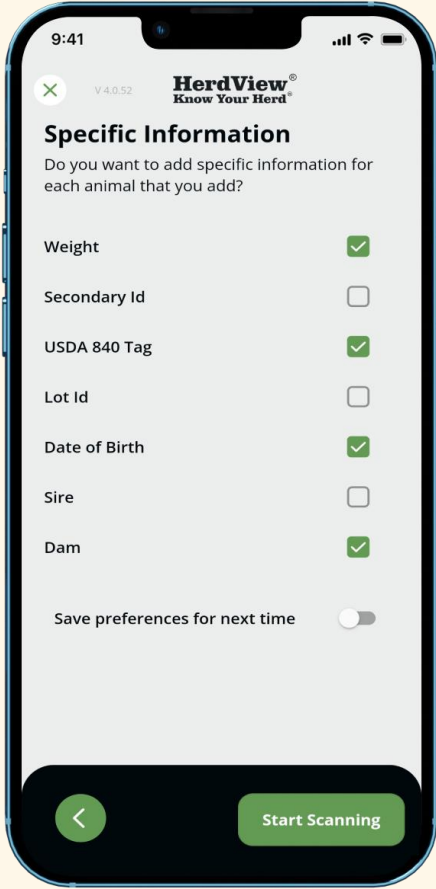
Once you have selected the **"Common Information"** and any **"Specific Information"** (information selected on separate screens in the process) criteria you'd like to include (again, this process is the same as the process for Adding to Inventory covered in Section 2), it is then time to begin scanning.

Tap the green **'Start Scanning'** button to begin.
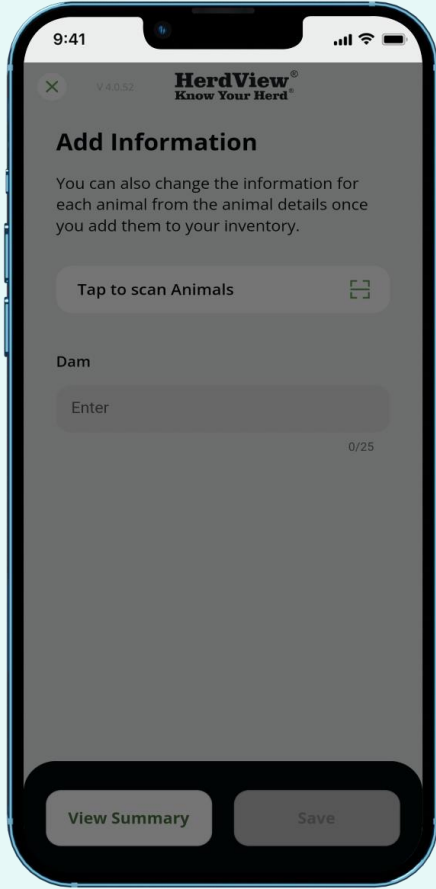
You can add **"Specific Information"** at any time by tapping an individual animal ID number from the session list. You can also scan an individual tag by tapping the scan icon on the right side of the **'No Tag Added'** Field. Be sure to tap the green **'Save'** button before navigating to the next animal as seen on the screen on the next page.

When you finishes processing an incoming transfer, the animals will show up in their inventory and will be removed from the sender's inventory.

10B – OUTGOING TRANSFERS
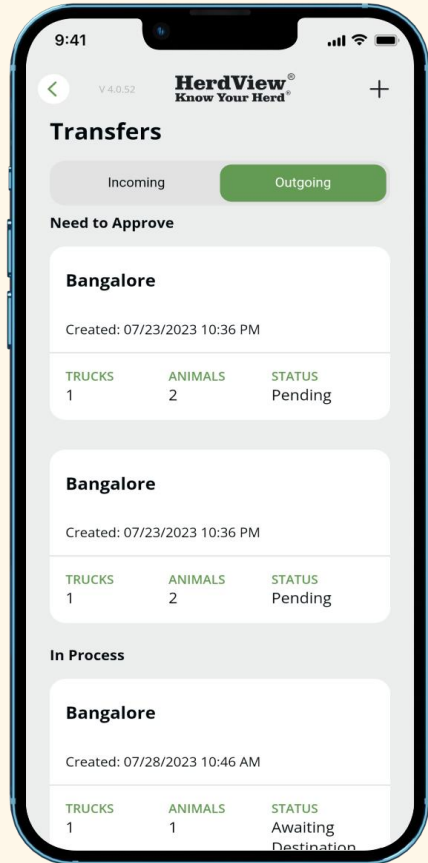
To view outgoing transfers, toggle the **"Transfers"** bar to the green **"Outgoing"** bar. Please note, all cattle leaving your site must be approved by the **'Shipped To"** organization before a transfer can be completed.

Approve a shipment by tapping the white shipment card and selecting **'Approve'**, just like you do with incoming transfers (as outlined above).

To create an outgoing transfer, tap the '**+**' icon in the upper right-hand corner.

Begin by selecting a participating HerdView® organization **"To Another Site"** (or **"To Another Organization"**) to ship to under the organization name field (simply tap to browse/search names). Tap **'Save'** to continue.

Next, on **"Select Pen/Pasture"** page select the pen or pasture you are creating a shipment from. The green oval provides the number of animals in the pen. You will also see the Lot IDs, date last updated, pen average weight and ADG. If you want to transfer number of animals less that the total pen amount then you will need to move the animals you do not want to transfer out of the pen into another pen using "Move Animals" function

Note that selecting a pen will select all animals inside of that pen, you cannot select portions or individual animals from a pen or pens.

Tap the **"green arrow"** to continue.

Next, you will have the option to validate the number of animals in your outgoing shipment. Select your preferred method of scanning and tap the green **'Start Scanning'** button.

This workflow is the same as the Counting Sessions workflow covered in Section 7 on Validating Counts. Please review it if necessary.

10B – OUTGOING TRANSFERS

Once you have scanned your animals, you'll arrive at your **"Session Summary"**.

You will be provided with number of tags scanned and the total pen count. This is provided to help you initially identify any potential differences, errors, or issues. You can also search by tag ID or secondary ID.

To edit or remove any animals, tap the **"three dots"** in the right-hand corner of an animal ID card. After you have finished your work, tap **'Next'** to continue.

If you click **"Save"** that will take you to **"Transfer Summary Screen"**.

If there are any errors, such as missing or duplicate tags, you will see the problem tags on **"Issues"** page. Issues will be listed with red error markers. You must tap on each issue and resolve them before being able to create an outgoing shipment.

Tags marked as **'Missing'** are animals that are supposed to be in the selected pen but were not scanned, and tags marked as **"Unexpected"** are animals that are not assigned to the pen but were scanned. Totals are provided for each type of issue.

10B – OUTGOING TRANSFERS
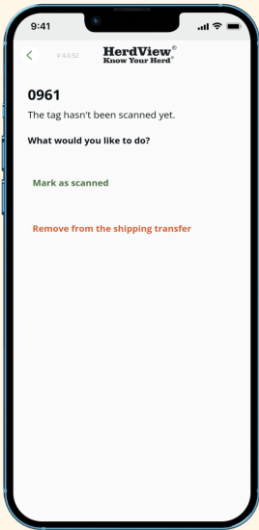
For **"Missing"** tags , you can mark as scanned (for example, if the reader missed the tag and you can confirm the animal is in the pen), or you can choose to remove the tag from the shipment. Just tap the appropriate action on the screen.
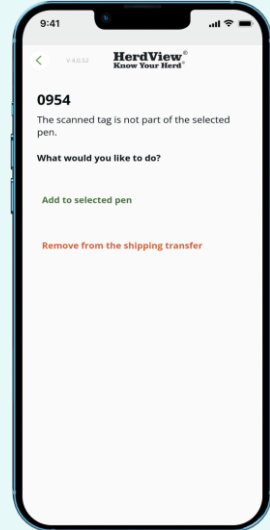
For **"Unexpected"** tags, choose to either **"Add the animal to the selected pen"**, or **"remove the tag from the shipping transfer"**. Just select the applicable option.
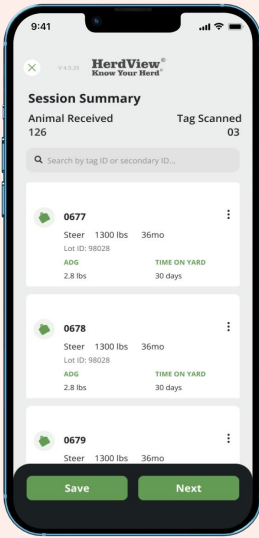
Once you have resolved all missing or **"Unexpected"** tags, return to your Session Summary. If the session is complete tap the green **'Next'** button.
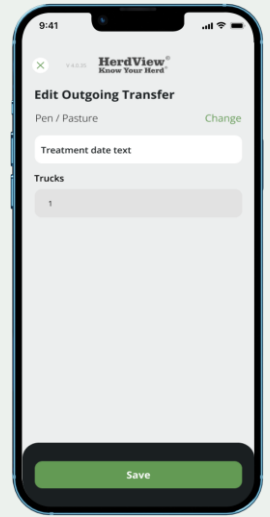
Next, you will enter the number of **"Trucks"** your shipment contains. Tap **'Create Shipping Transfer'** to continue.

After you click on **"Save"** button that will take you to **"Transfer Summary Screen".**

10C - NON HERDVIEW® OUTGOING TRANSFERS
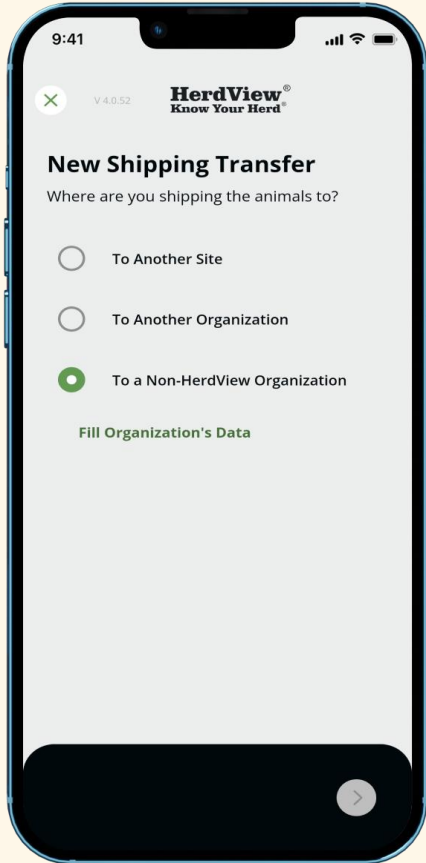
When creating an outgoing transfer for a recipient that exists outside of the **HerdView®** organization, select **'To a non HerdView Organization'** from the **"New Shipping Transfer"** page The proceed by hitting the **"green arrow"** at the bottom of the page.

On the next page we will be able to **"Fill Organization's Data"** - which is information about where you are shipping the animals to.
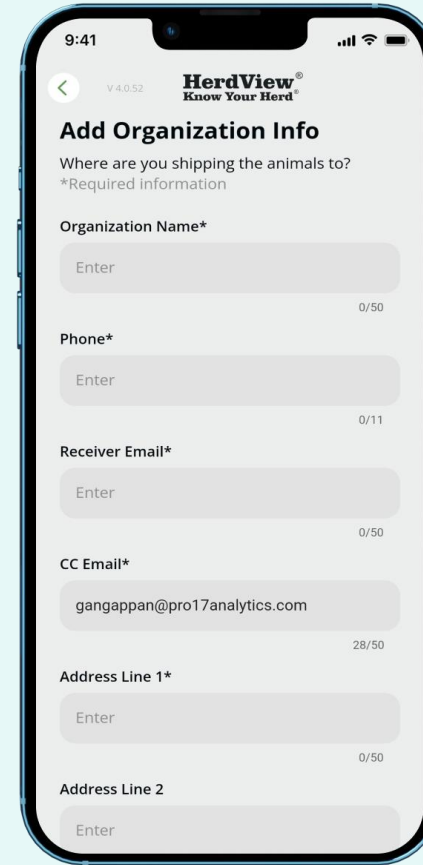
You will then need to fill out all of the required information for the recipient of the shipment.

When you are done hit **'Save'** box at the bottom of the screen and then continue through the rest of the workflow as outlined previously in this guide for **"Outgoing Transfers"**.

HerdView®
Application Training (including HHR)

support@herdx.com

(833) 437-3987

THE HANDHELD READER

A handheld reader is a portable device that allows users to scan and collect data from RFID tags. These readers are designed to be compact, lightweight, better reading range, durable, long battery life, and easy to use, making them suitable for a wide range of applications across your ranch.

Handheld readers provide real-time visibility and accurate data capture, enabling you efficiently track and manage the assets and inventory.

Handheld Reader Features:

- **Counting Sessions** - Animal Counting and Validation.
- **Inventory** – Adding animals, Animal Records, Management, Control, Reporting, etc.
- **Select Multiple Animals** – Select Multiple Animals and helps to move, ect,..
- **Locate a Tag** – Locate animal buy entering tag id or using animal card.
- **Transfers** - Traceability between ranches, locations, pens/pastures and 3rd parties.
- **Search Animals** – Search Animal easily.

1. ADDING TO INVENTORY

Step - 1

HerdView Inventory `74`

7 Pens **- 0** Pastures

AVG. WEIGHT (10 of 74)   ADG

2318.3 lbs   0.0 lbs

In the top right-hand corner of the **"HerdView® Inventory"** card, in a green oval shape, you will see the total number of animals in your Inventory, across multiple Pens/pastures. Additionally, the number of pens, combined average weight and ADG are also provided.

Tap the **"HerdView® Inventory"** you have a card to see all of your animals in inventory, across pens and pastures.
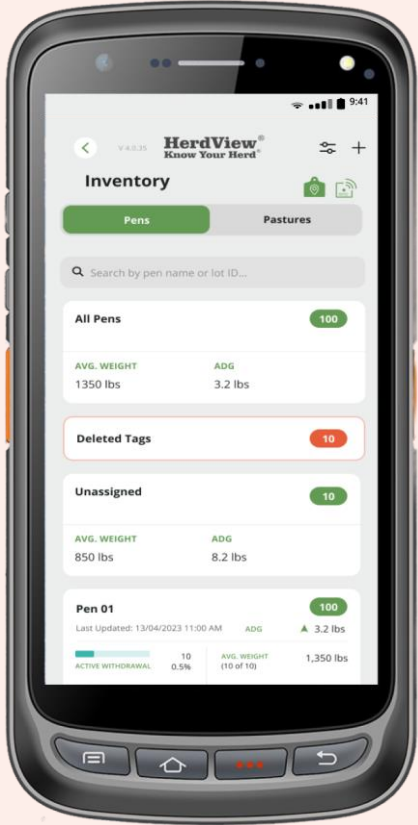
Step - 2

In this section, we'll show you how to add animals to inventory, and add new pens and pastures to inventory.

But before you start, please take note that you have a card with "All Pens" that gives you same information noted on previous page and provides a card for each pen with same information plus Lot ID and date last updated.

To add new inventory, begin by tapping the **"+"** symbol in the upper right corner of the app.

Additional notes:
If you see a card on this screen with **"Unassigned"**, animals in this category have not been assigned to a **"Pen"** or **"Pasture"**. **"Unassigned"** animals will add to the total animal count on the main **"Inventory"** card on the previous page. Also, the one **"Unassigned"** animal inventory card will be shown in both the **"Pens"** and **"Pastures"** cards.

Next, you'll see a pop-up menu at the bottom of the screen where you will have the option to add animals to inventory. Select **"Add Animals to Inventory"** and continue to the next page.

1. ADDING ANIMALS TO INVENTORY

Step - 3

We'll cover two ways to add animals to your inventory -

1)   Handheld Reader

2)   with Manual Entry.

Select your preferred method of adding to inventory.

To '**Add New Animals**' to the inventory by selecting the '**Handheld Reader**' and tapping on the lower **"green arrow"** to continue with the next steps.
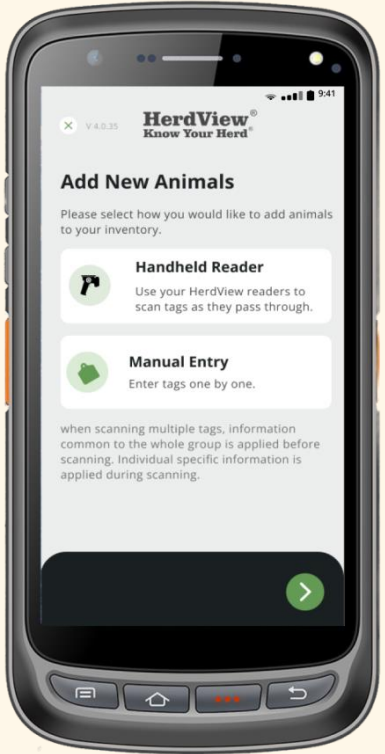
Step - 4

Next, you'll have the option to select '**Common Information**' for the animals you are adding. Just remember, you'll always be able to go back and edit these fields later, but this gives you the opportunity to save some time from the beginning.

Once you've made your selection on the previous screen, continue to the next page, where you will be able to fill out the selected fields on this screen.

Fill out each field based on the **"Common Information"** selections you made on the previous page. You can go back to the previous screen and modify the selections.

Tap the lower **"green arrows"** to go forward or go back to the previous screens.
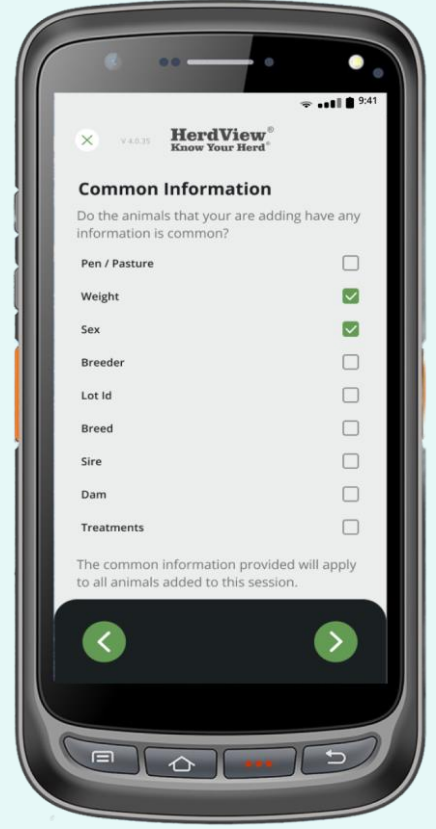
1. ADDING ANIMALS TO INVENTORY

Step - 5

After you've filled in each field, you'll continue to '**Specific Information**'. Just hit the arrow on the right to go forward. Here, you can select any fields you'd like to fill in for each individual animal when scanning their respective tag. Please note, adding **"Specific Information"** is optional.

Please note you can save the selections by turning on the **"Save preferences for the next time"** at the bottom of the screen.

If you need to go back to the previous screen just hit the **"green arrow"** on the left.
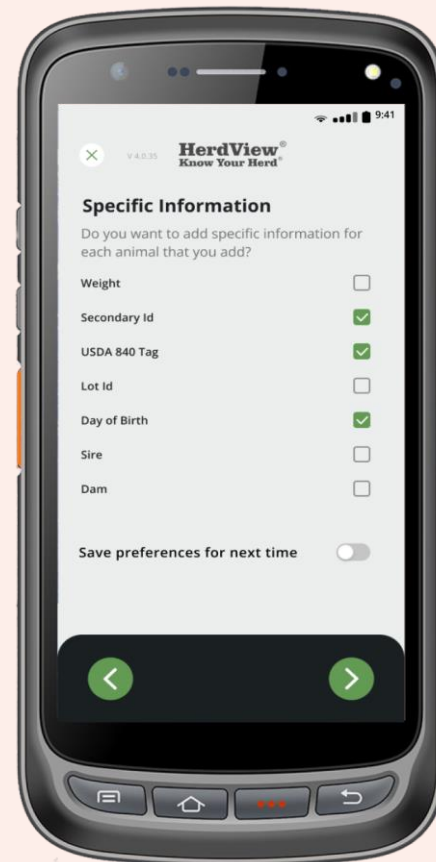
Step - 6
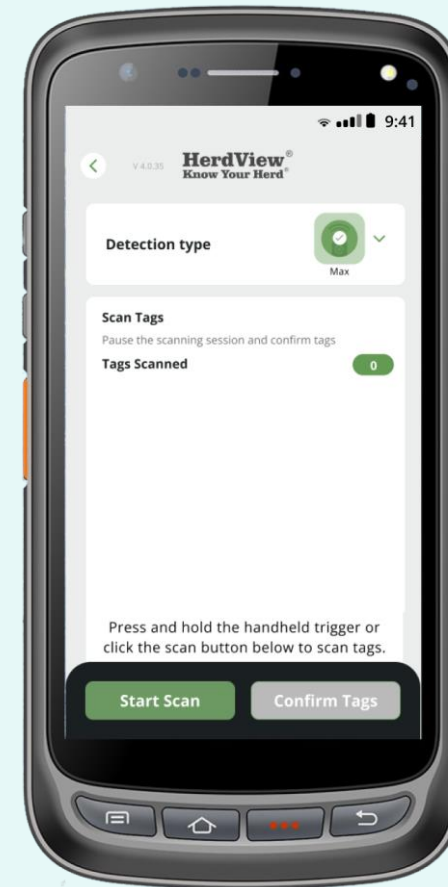
Our Handheld Reader comes with 3 Detection types. When scanning, choose the reading range option that best suits your needs. Scanning with the wrong detection setting may result in unread tags.

Close Detection – choose this option for chute side scanning sessions.

Wide Detection – choose this option for area monitoring, such as over water troughs.

Max Detection – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates & alleyways.

Once you have made your selection, hit the '**Start Scan**' button.

You can pull and release the handheld reader trigger to start scanning and stop scanning.

1. ADDING ANIMALS TO INVENTORY

Step - 7

If tags are being scanned, you will see **"Pause"** in the lower left-hand corner next to the **"Confirm Tags"** button.
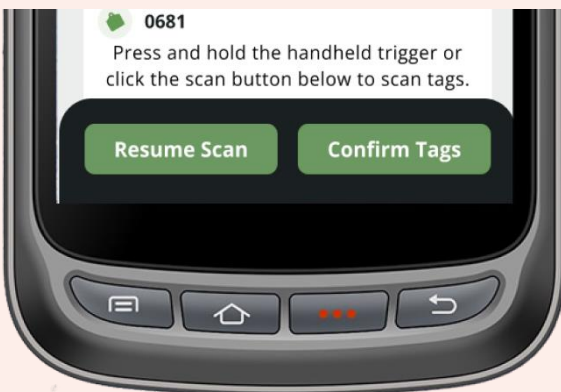
If you click **"Pause"**, you will see **"Resume Scan"** in the lower left-hand corner next to the **"Confirm Tags"** button. If your scanning process got the end, you can also click **"Confirm Tags"** to proceed next step.

Step - 8
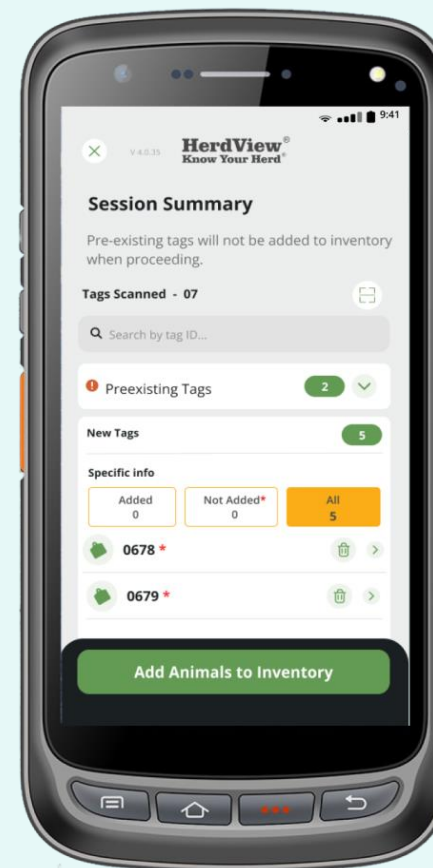
After clicking the confirm tags, you will see the next step as **"Session Summary"**.

You can see the number of **"Tags Scanned"** and a listing of the tags scanned with Specific Information. You can also perform a search on the tag ID.

Pre-existing tags will not be added to inventory. when proceeding **"New Tags"** only will show with the Asterisk **" * "**.

Also, You have a separate tab for "Non - Organization Tags".

1. ADDING ANIMALS TO INVENTORY

Step - 9

After selecting the **"Add Animals to Inventory"** option on the previous screen, a message will appear asking, **"Do you want to end this session and add all scanned tags to your inventory without adding specific information?"**

Choosing **"Yes"** will add the animals to your inventory, and you will receive a popup message confirming the successful addition.

Opting for **"No"** will redirect you to the **"Session Summary"** page.
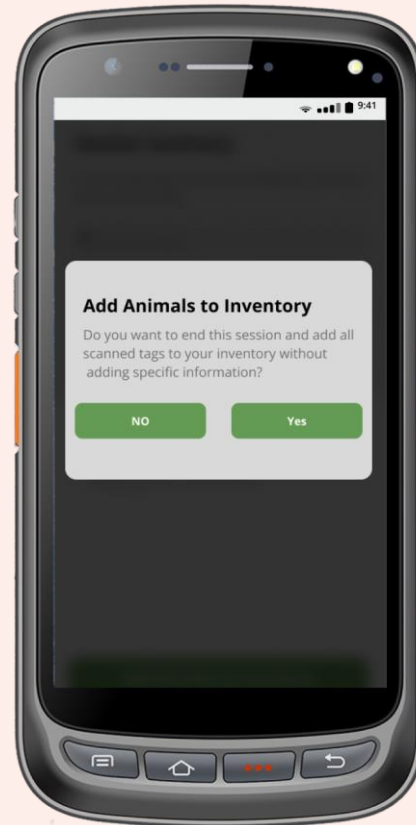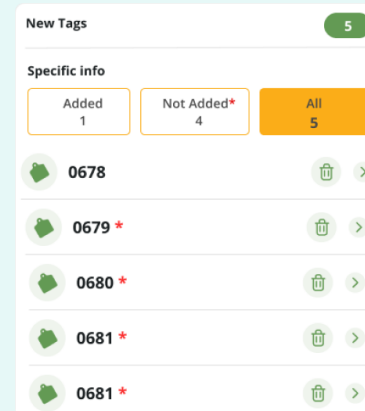
Step - 10

After clicking No that will take you the session summary page in there horizontally you can see the animal tag id, delete icon and arrow

If you select the arrow, a popup screen will appear prompting you to input specific information. Once you have filled out the necessary details, click on **"Save"** to proceed to the new session summary screen. Alternatively, clicking **"Cancel"** will redirect you to the same session summary screen.

Furthermore, by clicking on the delete icon, you can easily remove any unwanted tags from the system.

HERD X
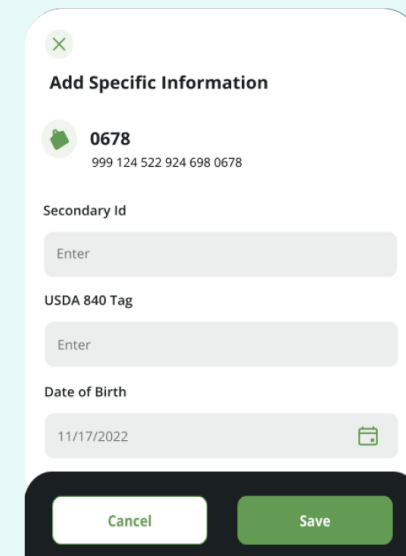
1. ADDING ANIMALS TO INVENTORY

Step - 11

Once you have entered the specific information and clicked on **"Save,"** you will be directed to a new session summary screen. On this screen, you will notice yellow buttons labeled as **"Added," "Not Added,"** and **"All."**

The **"Added"** button displays the currently added specific information for the animals.

The **"Not Added"** button indicates that there is no specific information available for the animals.

The **"All"** button shows all the scanned tags, whether they have specific information associated with them or not.
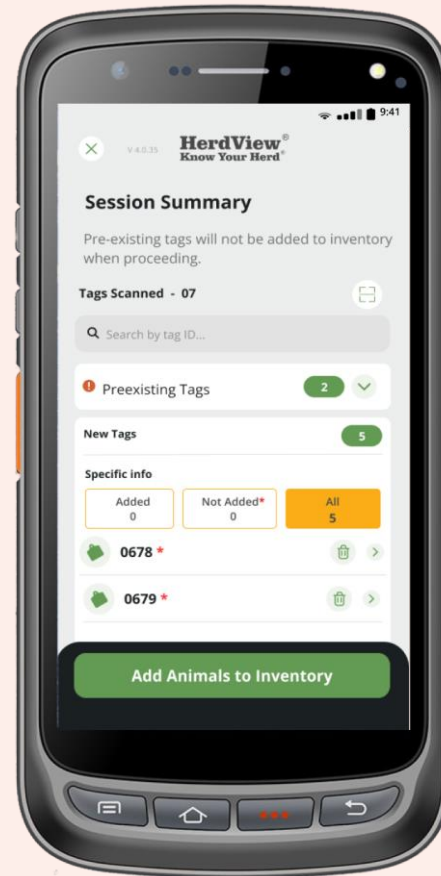
Step - 12

To delete an animal tag, simply locate and click on the "Delete" icon positioned horizontally next to the Tag ID. Once you click the delete icon, a popup screen will appear with the message, **"Are you sure you want to remove tag - 0680?"**

If you choose to click **"Yes,"** the unwanted tags will be successfully removed, and you will be redirected to a new session summary screen where the deleted ID will no longer be present.

On the other hand, if you click **"No,"** you will remain on the same **"Session Summary"** page without making any changes.

1. ADDING ANIMALS TO INVENTORY

2. SELECT MULTIPLE ANIMAL
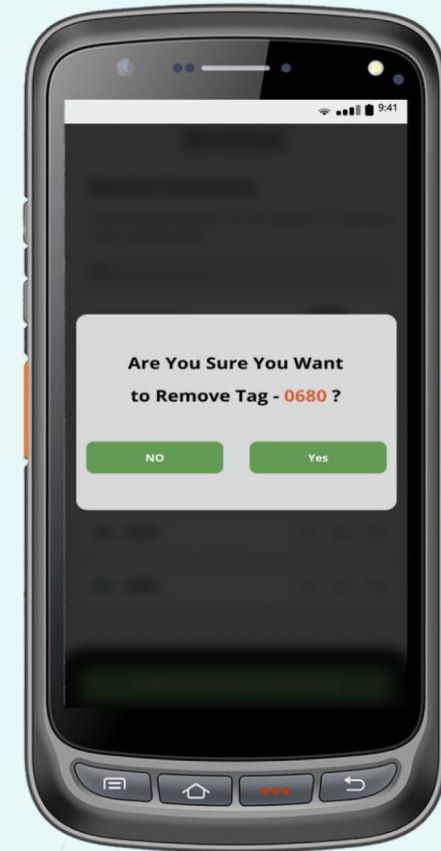
Step - 13

After confirming your session, select the option **"Add Animals to Inventory"**. Select **"Yes"** to confirm or **"No"** to stay on the summary page. Selecting **"Yes"** will add the animals to your inventory and a successful pop-up message will appear.

Animals not assigned to an enclosure will be added to **"Unassigned".** You can move animals to another enclosure at any time.
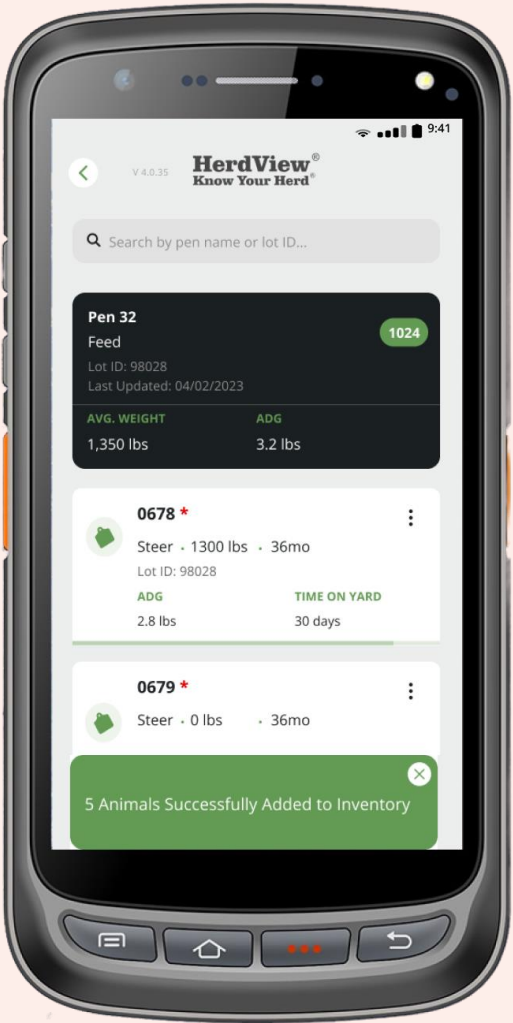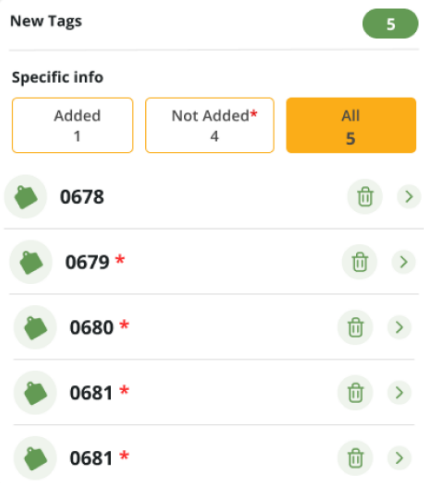
STEP 1

To move some or all the animals in one Pen / Pasture to another, begin by searching and selecting the **"Enclosure"** you want to transfer animals out of.

Tap the **"three dots"** icon in the upper right-hand corner of the screen.
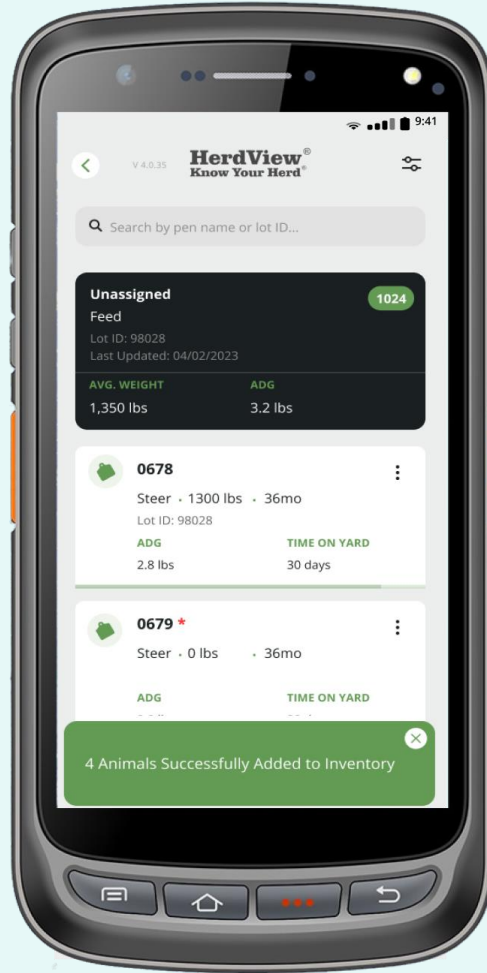
2. SELECT MULTIPLE ANIMAL

STEP 2

Tap **"Select Multiple – Manual"** from the pop-up screen. Pen/pasture movement can also be done by selecting **"Select Animals - Scan"** with a HerdView® Handheld Reader.
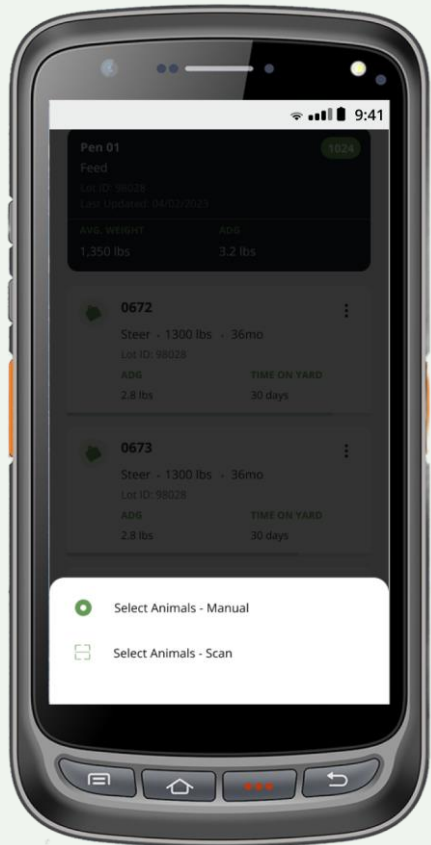
STEP 3

While on this screen you have the option to select all the animals (tags) in the Pens or Pastures or manually select individual animals/tags.

If you want to select all the animals hit **"Select All"** in the upper-right hand corner of the screen.

If you want to select only certain animals/tags just check the **"circle"** in from of each animal tag number.

If you **"Select All"** and decide you don't want to then you can always hit **"Unselect All"** that will be in the upper right-hand corner as well. That will remove the tag selections from the screen.

"Quick Actions" will be reviewed on the next page of the guide.

From the **"Quick Actions"** menu at the bottom of the screen, select **'Move to Pen/Pasture'**.
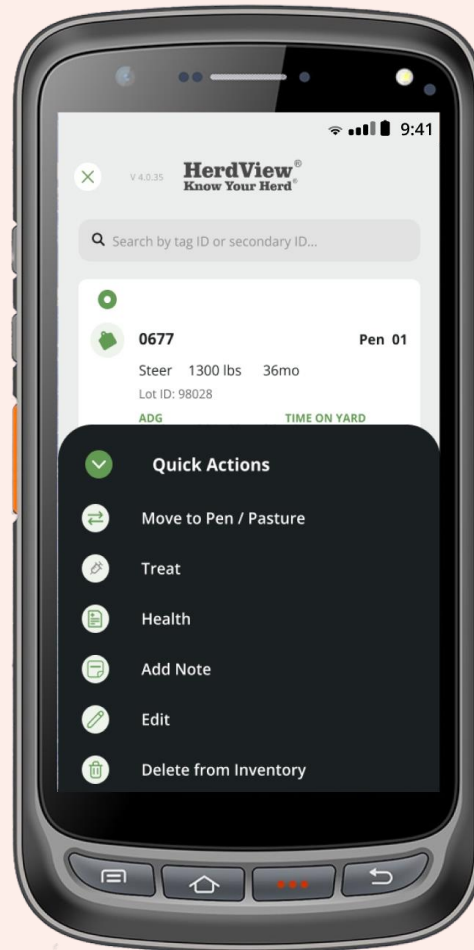
2. SELECT MULTIPLE ANIMAL

STEP 4

In the **"Move to Pen/Pasture"** section, choose the animal tag where you want to move your pen or pasture.

Once you have made your selection, click on the **"Finalize"** button to proceed with the process. After clicking the finalize that will show where you are transferring too**.** Made a selection of pen over there.
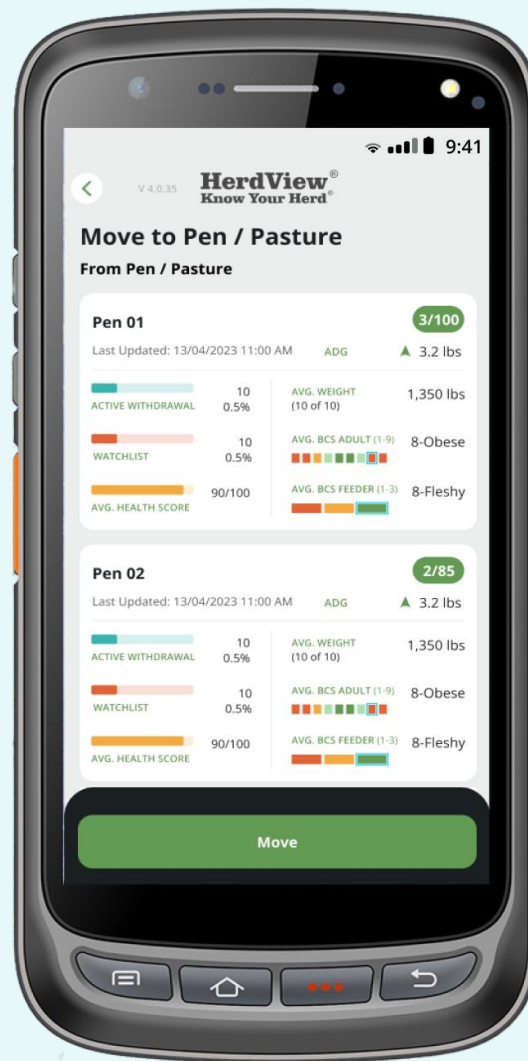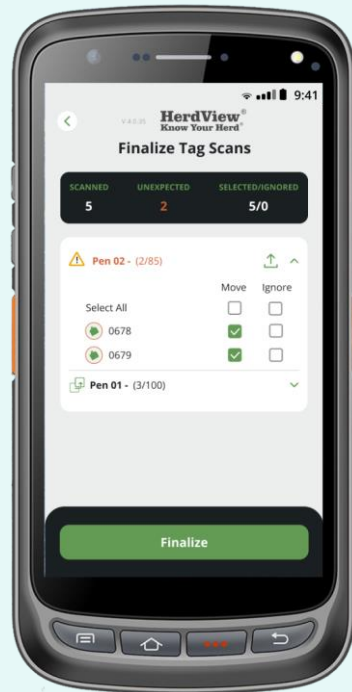
STEP 5

Confirm the information on the screen before moving on.

Be sure to tap the green **"Move"** button at the bottom of the screen to finish the movement of the animals.

After the process done you will get a pop up screen that the **"Animals Moved Successfully"**
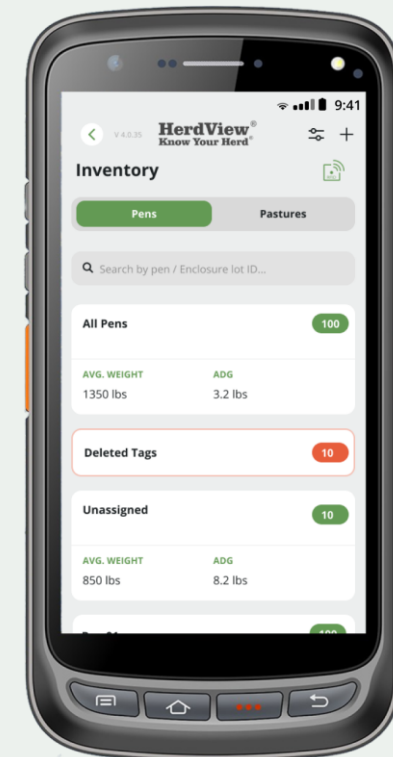
3. SEARCH ANIMAL
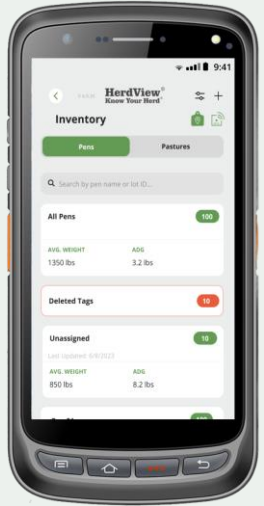
STEP 1

To 'Search a Animal' from inventory. You must Tap **"RFID"** icon on the right top of the screen.
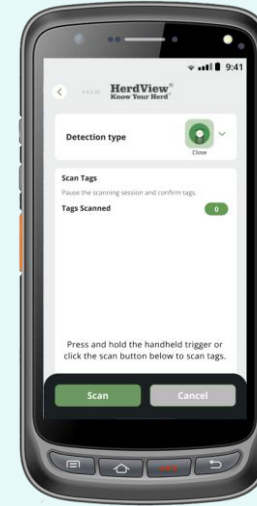
STEP 2

Next, you should click on **" Scan"** to start the process. Also, we can change the detection type.

While scanning press and hold the trigger to continue scanning.
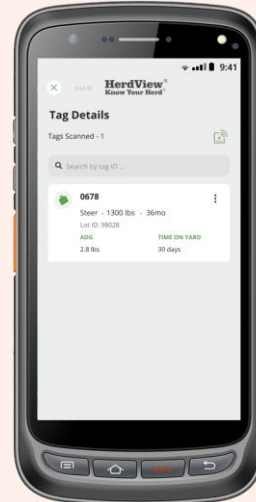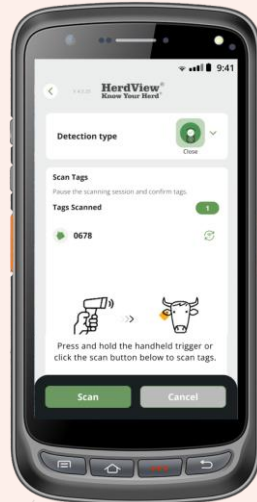
STEP 3

Once the tag gets scanned but have to pick some other tag id means you can refresh by using the **"Refresh icon"** to initiate the new scan. That will take you to the tag found screen.

(833) 437-3987 | support@herdx.com

4. COUNTING SESSIONS
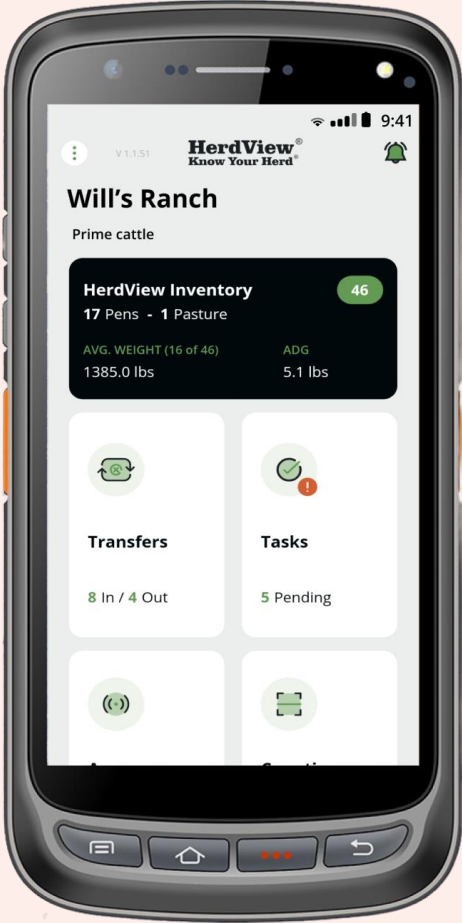
Step - 1

The **HerdView® App** comes with a **"Counting Session"** feature that will help you quickly and effectively count and manage your animals.

Begin by navigating to your **"Home"** page main dashboard. Tap on the **'Counting Sessions'** card in the lower right-hand corner.

On this card, at the bottom you will see the number of counting sessions **('Sessions")** performed.

Step - 2

Tap the **"+"** icon in the upper right-hand corner to start a new Counting Session.
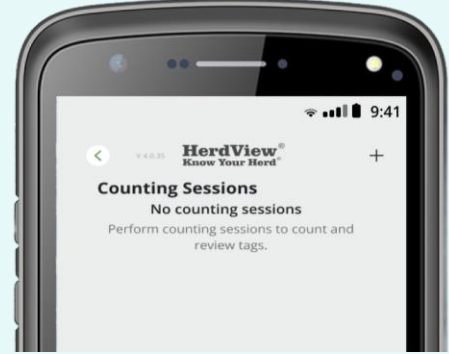
Enter a **"Name"** for your **"Counting Session Name"** and press the **"Green Arrow"** in the lower right-hand corner to continue. You can name each session whatever you'd like, there is no set format for naming a Counting Session.
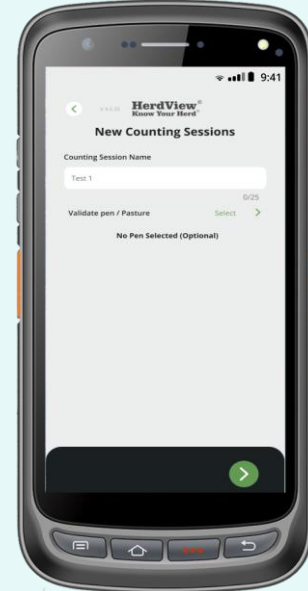
However, the **HerdView® App** will automatically assign a six-digit identifier code to each session in order to differentiate individual counting sessions more easily in the system.

You'll also see a field for selecting a Pen or Pasture to validate, this field is optional and can be left empty for your counting session.

4. COUNTING SESSIONS
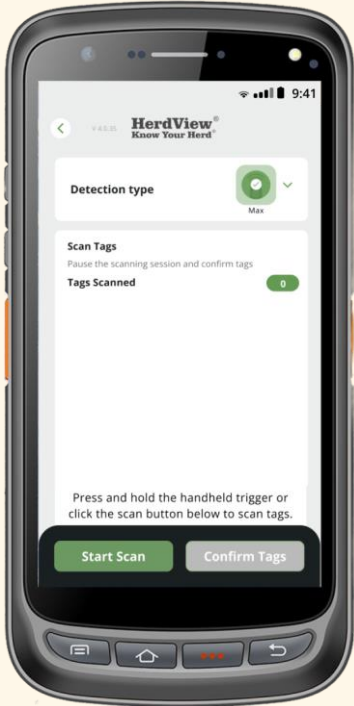
Step - 3

Once you click the Dropdown arrow next to the detection type your Handheld Reader comes with 3 Detection types. When scanning, choose the reading range option that best suits your needs. Scanning with the wrong detection setting may result in unread tags.

Close Detection – choose this option for chute side scanning sessions.

Wide Detection – choose this option for area monitoring, such as over water troughs.

Max Detection – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates & alleyways.

Once you have made your selection, hit the '**Start Scan'** button.

Step - 4

If tags are being scanned, you will see **"Pause"** in the lower left-hand corner next to the **"Confirm Tags"** button.

If you click **"Pause"**, you will see **"Resume Scan"** in the lower left-hand corner next to the **"Confirm Tags"** button. If your scanning process got the end, you can also click **"Confirm Tags"** to proceed next step.
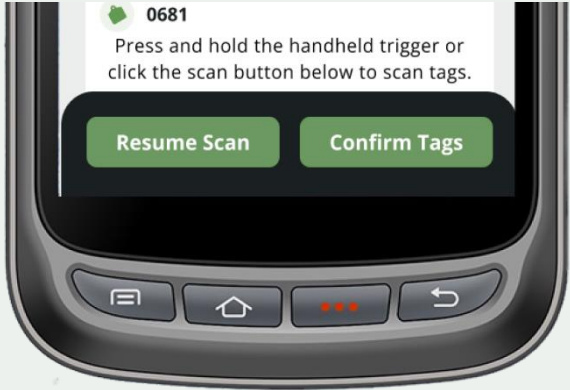
4. COUNTING SESSIONS
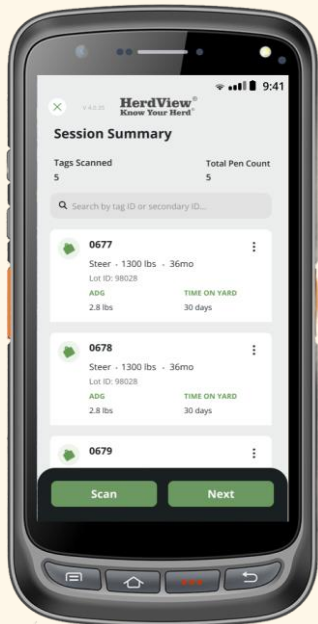
Step - 5

After selecting your reader and appropriate read range, tap the green **'Scan'** button to begin scanning tags.

You can tap the green **'Finalize Session'** button at any time to complete the session - see the following pages.
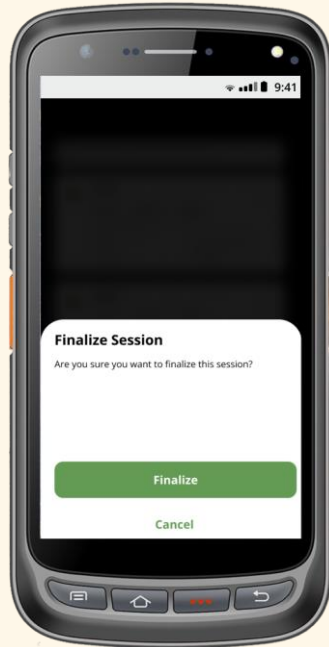
Step - 6

Confirm by tapping **'Finalize'** when prompted by the resulting pop-up screen.

If you hit **"Cancel"** you will stay on the **"Finalize Session"** screen where you can scan more tags or remove tags that were already scanned.

Step - 7

Your scan will now be listed on your **"Counting Sessions"** dashboard.
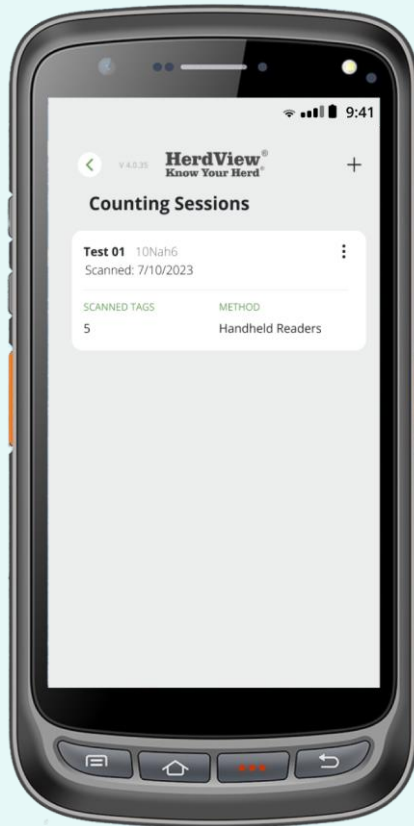
Please note you are always able to go edit the title of a counting session, or delete sessions, by tapping the **"three dots"** in the corner of each counting session card.

To view a previous counting session, tap the applicable card. You'll see each tag from the scanning session listed with any added information displayed for each ID number.

You can also delete all counting sessions. Just hit **"Delete All Counting Sessions"** at the bottom of the screen.

4A. COUNTING SESSIONS FOR PEN / PASTURE
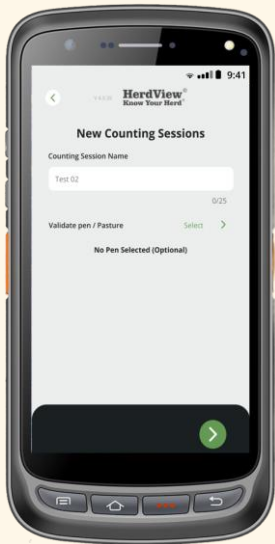
STEP 1

To validate the animal count for a pen or pasture, begin by tapping the **"Counting Sessions"** card from your main dashboard, then tapping the **'Select'** the Pen / Pasture .
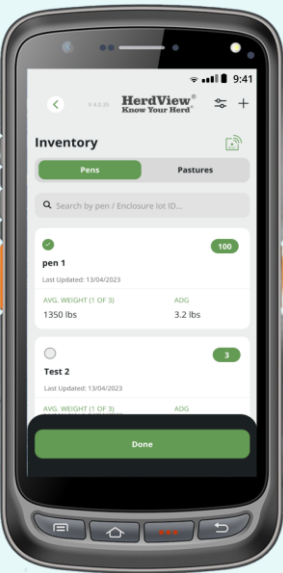
STEP 2

After selecting **"Pen / Pasture"** you will get a list. Once you select the pen or pasture from that list to view the individual pen details.
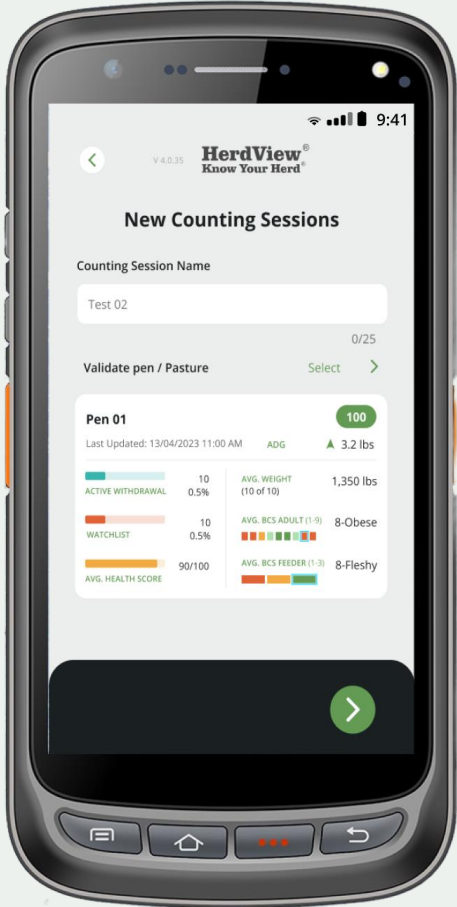
STEP 3

Name your counting session just like you would normally, then select a Pen or Pasture from the field below. Tap the **"green arrow"** to continue.

During the counting session process, if you select a pen to validate and have accidentally selected the wrong pen, you can go back and change the pen. Just hit **"Change >"** in the right hand corner above the top animal ID. Follow the steps and problem solved!

4A. COUNTING SESSIONS FOR PEN / PASTURE
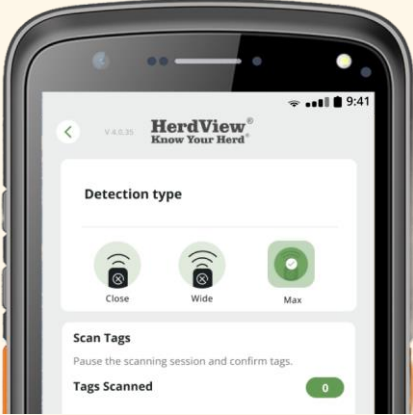
STEP 4

Once you click the Dropdown arrow next to the detection type your Handheld Reader comes with 3 Detection types. When scanning, choose the reading range option that best suits your needs. Scanning with the wrong detection setting may result in unread tags.

Close Detection – choose this option for chute side scanning sessions.

Wide Detection – choose this option for area monitoring, such as over water troughs.

Max Detection – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates & alleyways.

Once you have made your selection, hit the '**Start Scan**' button.
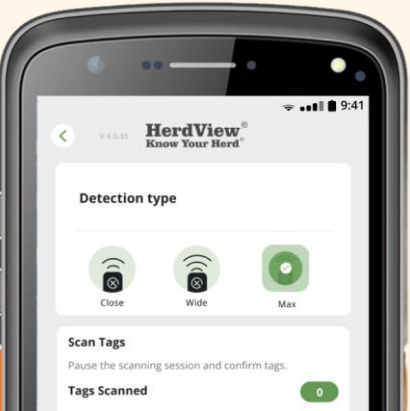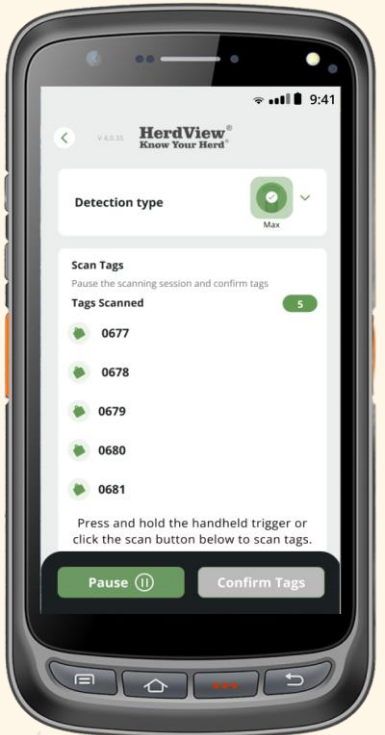
STEP 5

Just like the instructions for when you initially started scanning tags for the counting session, use the **"Pause / Play Buttons"** to stop or resume your counting session.
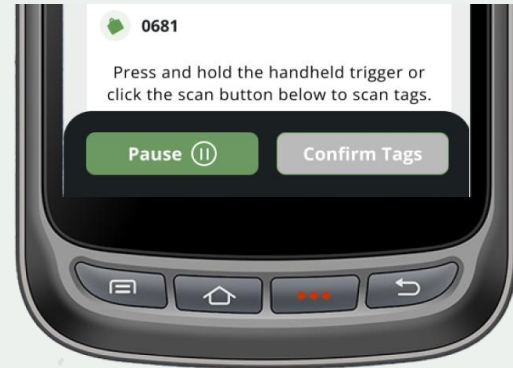
Tap the **"Resume scan"** button and hit '**Confirm Tags**' to continue.
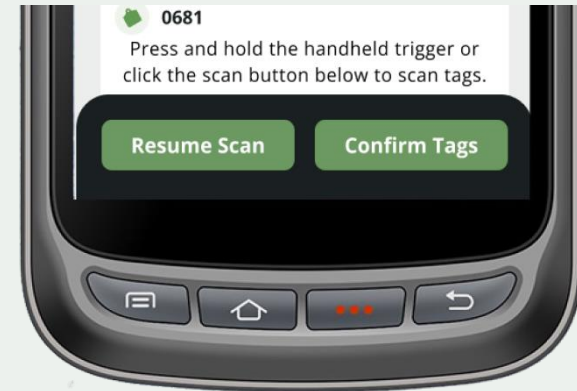
4A. COUNTING SESSIONS FOR PEN / PASTURE (HHR)
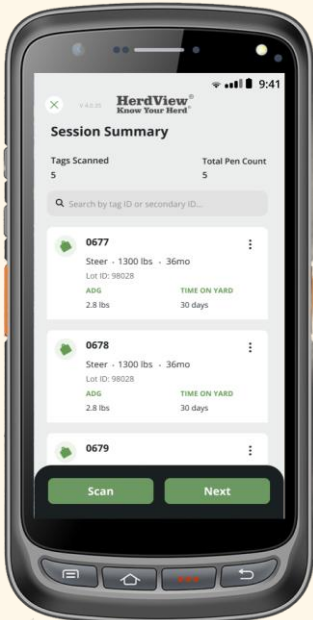
STEP 6

When validating a Pen/Pasture Count, you'll see the number of animals currently counted and the number that have been counted in the upper-left hand corner **("Tags Scanned")**. Ideally, these numbers will be the same once the scanning session is complete. If needed, you will have an opportunity reconcile and resolve any differences.

Tap **"Next"** to continue.

STEP 7

"Missing" tags are tags that should have been scanned but did not show up in the count.

"Unexpected" refers to a scanned animal tag that is assigned to a different pen but was scanned in the selected Pen being counted.

Any tags that are missing from the validation count can be moved to a different pen in the application or a tag(s) can be removed from the counting session. Just tapping the animal ID card and select your option.
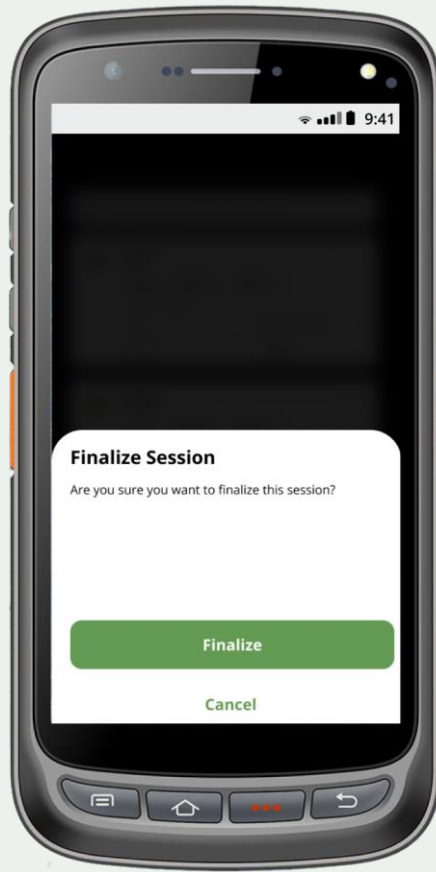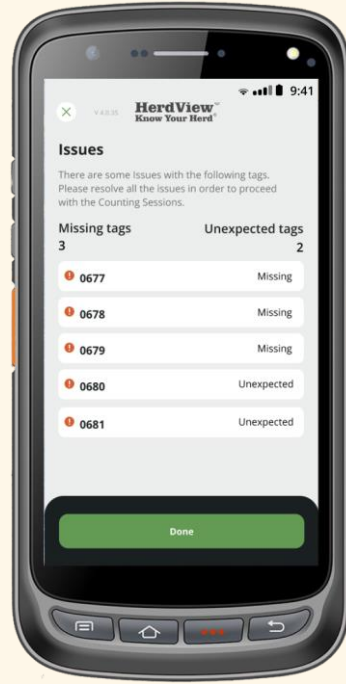
STEP 8

Once you have resolved the missing tags and/or unexpected tags (as noted on the previous page), if any, continue to the **"Session Summary"** and tap **'Finalize'** to save your pen validation count.

You can always cancel the session by hitting **"Cancel"** at the bottom of the screen. Canceling will take you back to the session summary to review the tags that were scanned.

If you finalize, this session will now be listed in your **"Counting Session History"**.

5. LOCATE A TAG FROM INVENTORY
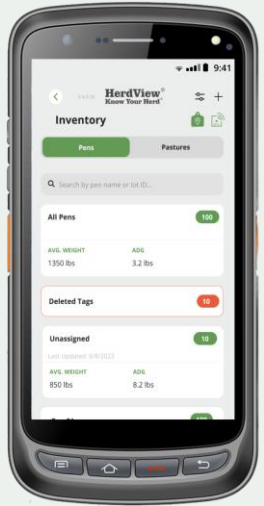
STEP 1

The Handheld Reader can help you locate a tag or specific animal amongst other tagged animals. To **'Locate a Tag'**, navigate to your inventory and tap **"Green Tag"** icon with the location pin in the middle.

STEP 2

Next, enter the Tag ID in the search field. Then click on the **"Start Scan"** button or press and hold the Handheld Trigger to start the search. If you use the trigger then the search will stop if you release the trigger.
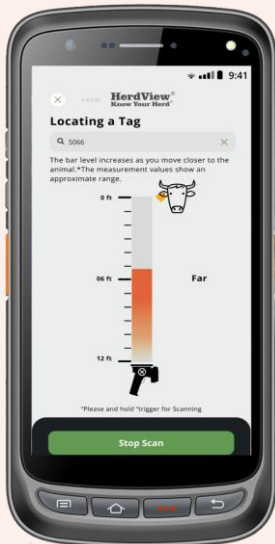
STEP 3

Once you start searching for a HerdX Tag, a gradient bar will appear on your screen to indicate how far away you are from the tag. There are three general ranges: **"Too Far", "Far", and "Close".** Once you get within feet of the searched tag, a message will appear that the tag was found with the animal card information.

STEP 4
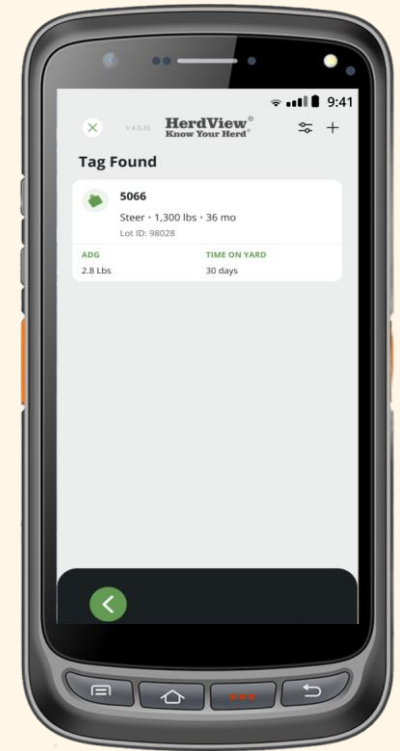
If you want to go back and search new tag means just tap on the **" X "** in top left corner.

5A. LOCATE A TAG FROM ANIMAL CARD
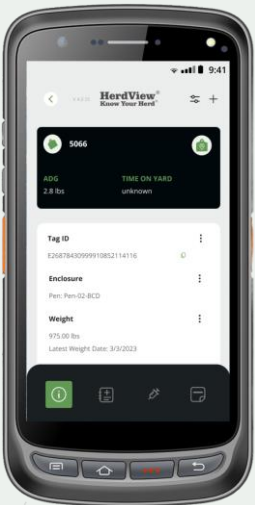
STEP 1

To **'Locate a Tag'** from an animal card, Tap the green tag icon with the location pin in the middle. This is located in the top right corner of the black card.

STEP 2

Next, enter the Tag ID in the search field. Then click on the **"Start Scan"** button or press and hold the Handheld Trigger to start the search. If you use the trigger then the search will stop if you release the trigger.
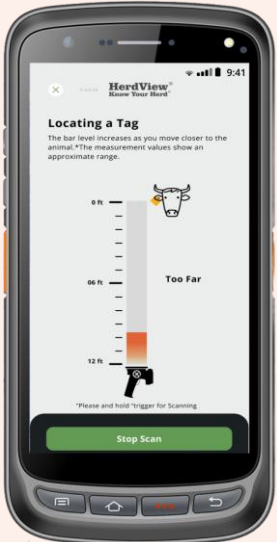
STEP 3

Once you tap on **"Start Scan"** by using **"Trigger"** and hold continuously, if you stop holding that trigger that will stop automatically.

Once you start searching for that Tag ID. You can see that indicates you with three ranges **"Too Far, Far, Close"**. After you find that tag you will get a text that says found successfully. Now, click on **"Done"**.

Once you click on **"Done"** that will take you to that animal card.

6 – TRANSFERS

In this section we'll cover how to manage incoming and outgoing animal transfers, including creating and approving transfers. To begin, tap on the **"Transfers"** card from your main app dashboard

On this main **"Transfers"** card you will see **"1 In/2 Out"** below **"Transfers"**. These numbers represent the number of transfers out and number of transfers that have been initiated that are included in the **"View All Incoming History"** and **"View All Outgoing History"** screens.

In your Transfers dashboard, you'll see the option to toggle between '**Incoming**' and '**Outgoing**' transfers. You will also see transfers categorized as '**Need to Approve**' and '**Shipped From**'.

When you click on **"Incoming"** at the bottom of the next page you can click on **"View All Incoming History"** and you will be taken to a screen that will show you all the transfers created including certain high-level detail about the transfer. From there you can follow the steps on page 111.

When you click on **"Outgoing"** you will see at bottom of the next page **"View All Incoming History"**. Click on that and you will be taken to a screen that provides more detail about the transfer. However, no actions can be taken from this detail page.

Step - 1

Incoming transfers must be approved (and processed) before being added to your HerdView® Inventory.

To approve an incoming transfer, from the previous page, select **"Incoming"** card which will show you all **"In-Process"** transfers. Pick the applicable transfer and click on the card. From here you'll see the transfer details such as ship form, number of trucks and animals, as well as list of all of the animal IDs included in the transfer. Tap the green '**Accept**' button and confirm on the following page that you are accepting the transfer.

The receiving organization for the incoming shipment has the option to accept of reject. If they reject the **"New Incoming Shipment"** they will hit the **"Reject"** tab at the bottom of the page.

If the **"New Incoming Shipment"** is rejected, an email notification will be sent to the organization shipping the animals advising of the **"Rejected"** status. Once rejected, the shipment will no longer be visible as an open transfer in that organization.

6A – INCOMING TRANSFERS

Step - 2
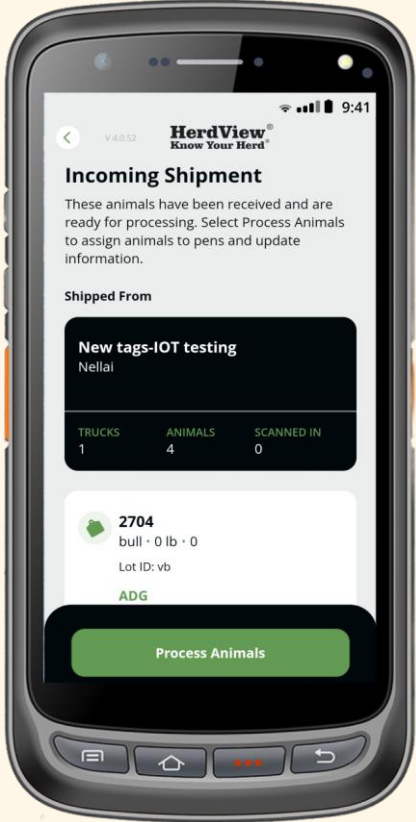
When you are ready to process an incoming shipment (for example, once an approved transfer arrives at your lot), find and tap the **"Transfer"** on the dashboard. Then tap on **"Incoming"** which will show you all **"In Process"** transfers. Pick the applicable transfer and click on the card.

Review the **"Incoming Shipment"** details. Then tap the green **'Process Animals'** button to begin. Remember, it is not until you have approved and processed an incoming shipment that the animals will be added to your inventory.

Step - 3

Next, you'll have the option to select **'Common Information'** for the animals you are adding. Just remember, you'll always be able to go back and edit these fields later, but this gives you the opportunity to save some time from the beginning.

Once you've made your selection on the previous screen, continue to the next page, where you will be able to fill out the selected fields on this screen.

Fill out each field based on the **"Common Information"** selections you made on the previous page. You can go back to the previous screen and modify the selections.

Tap the lower **"green arrows"** to go forward or go back to the previous screens.
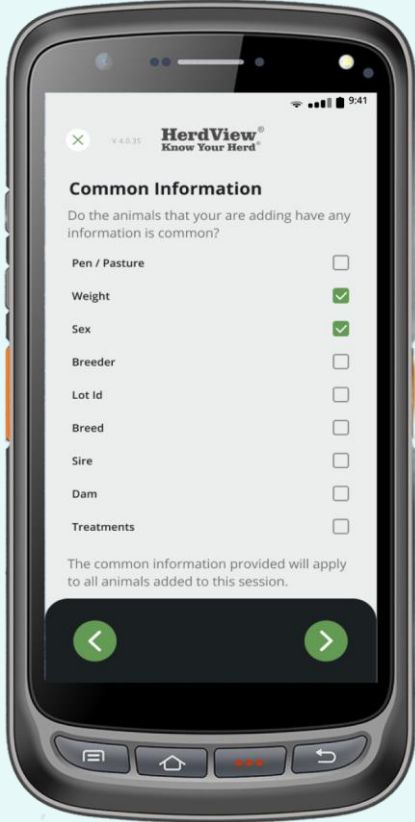
6A – INCOMING TRANSFERS

Step - 4

After you've filled in each field, you'll continue to **'Specific Information'**. Just hit the arrow on the right to go forward. Here, you can select any fields you'd like to fill in for each individual animal when scanning their respective tag. Please note, adding **"Specific Information"** is optional.

Please note you can save the selections by turning on the **"Save preferences for the next time"** at the bottom of the screen.

If you need to go back to the previous screen just hit the **"green arrow"** on the left.
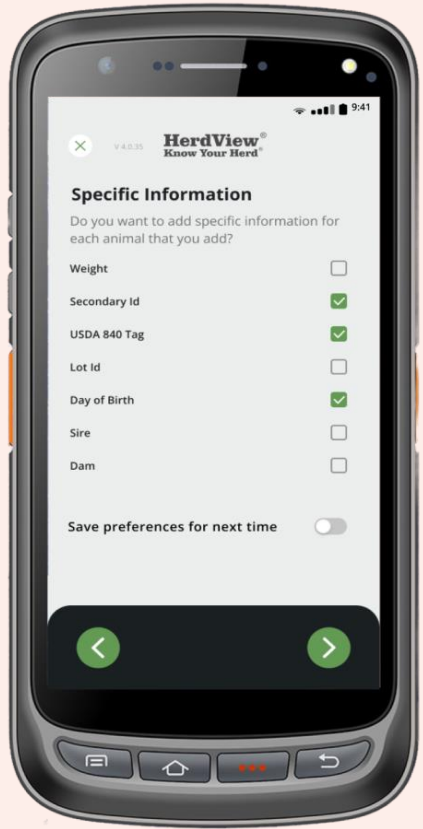
Step - 5
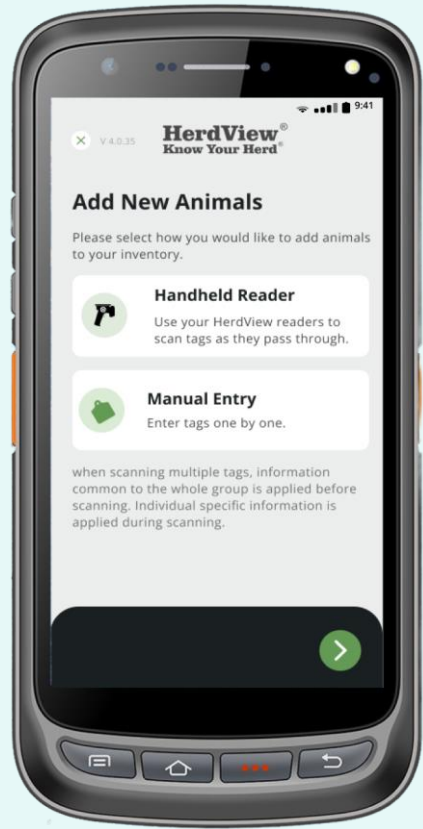
Our Handheld Reader comes with 3 Detection types. When scanning, choose the reading range option that best suits your needs. Scanning with the wrong detection setting may result in unread tags.

Close Detection – choose this option for chute side scanning sessions.

Wide Detection – choose this option for area monitoring, such as over water troughs.

Max Detection – choose this option for counting sessions that involve more than one animal being scanned at once, such as gates & alleyways.

Once you have made your selection, hit the **'Start Scan'** button.

6A – INCOMING TRANSFERS

Step - 6

If tags are being scanned, you will see **"Pause"** in the lower left-hand corner next to the **"Confirm Tags"** button.
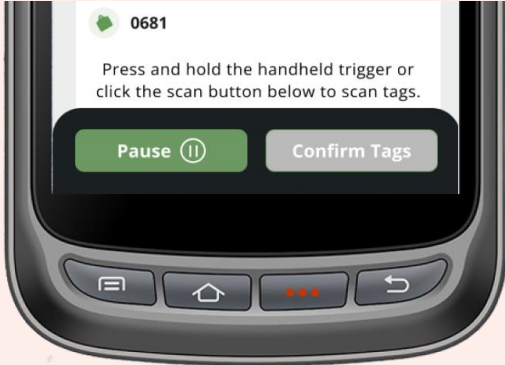
If you click **"Pause"**, you will see **"Resume Scan"** in the lower left-hand corner next to the **"Confirm Tags"** button. If your scanning process got the end, you can also click **"Confirm Tags"** to proceed next step.
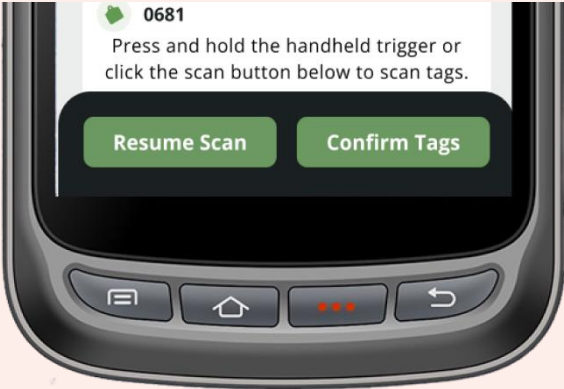
Step - 7

After clicking the confirm tags, you will see the next step as **"Session Summary"**.

You can see the number of **"Tags Scanned"** and a listing of the tags scanned with Specific Information. You can also perform a search on the tag ID.

Pre-existing tags will not be added to inventory. when proceeding **"New Tags"** only will show with the Asterisk **" * "**.

Also, You have a separate tab for "Non - Organization Tags".
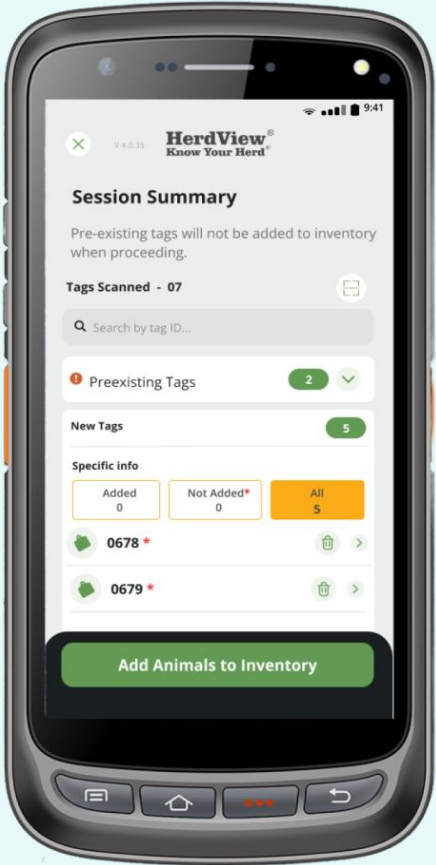
6A – INCOMING TRANSFERS

Step - 9

After clicking add animals to the inventory in the previous screen this message will pop up that says, **"Do you want to end this session and add all scanned tags to your inventory without adding specific information?"**

If we click on "**Yes**" those animals will be added to your inventory and you can see the successfully added popup message.

If you click on "**No**" that will take you to the "**Session Summary**" page.
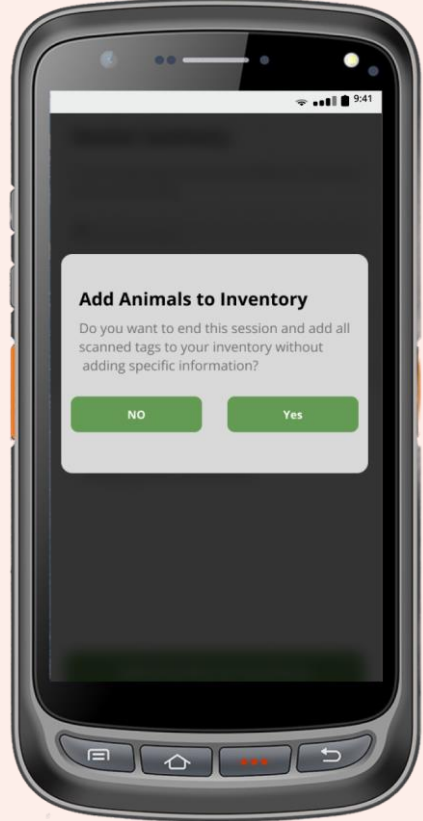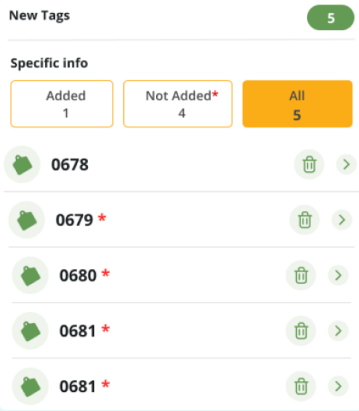
Step - 10

After clicking No that will take you the session summary page in there horizontally you can see the animal tag id, delete icon and arrow

If you click that arrow, you will get a popup screen to fill in specific information you should fill out that information and then click on **"Save"** that will take you to new session summary screen**.**
If you click **"Cancel"** that will take you to same session summary screen.

Now, if you click the delete icon the will help you to remove the unwanted tags.
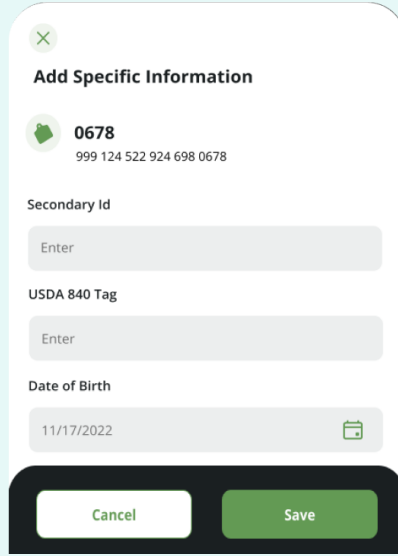
6A – INCOMING TRANSFERS

Step - 11

After you added the specific information and click save that will take you to new session summary screen. In that screen you can see those yellow buttons in there you can see Added, Not Added and All.

"Added" shows currently added specific information for the animals.

"Not Added" shows, there is no specific information for the animals

"All" show all tags that are scanned with or without specific information.
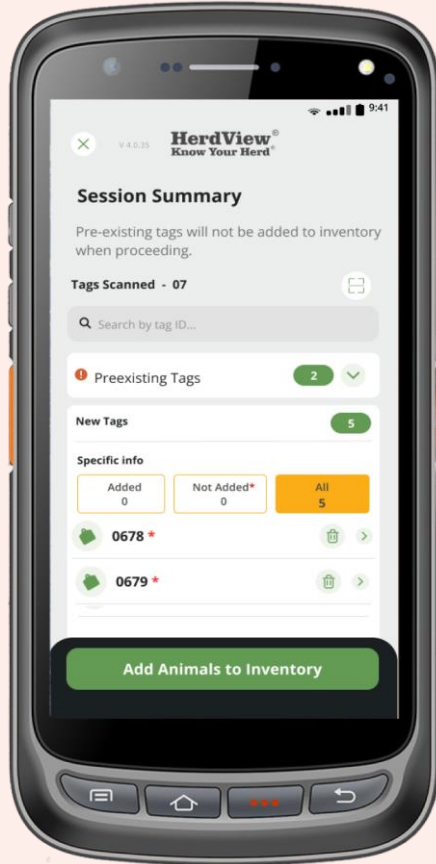
Step - 12

Now, If you want to delete the animals tag just click the "Delete" icon that horizontally you can see next to the Tag ID. One you click that delete icon. You got a popup screen with the message **"Are you sure you want to remove tag - 0680?"**

If we click on "**Yes**" that will help you to remove the unwanted tags. And you will land on a new session summary screen with the absence of that deleted ID.

If you click on
"**No**" that will take you to the same **"Session Summary"** page.
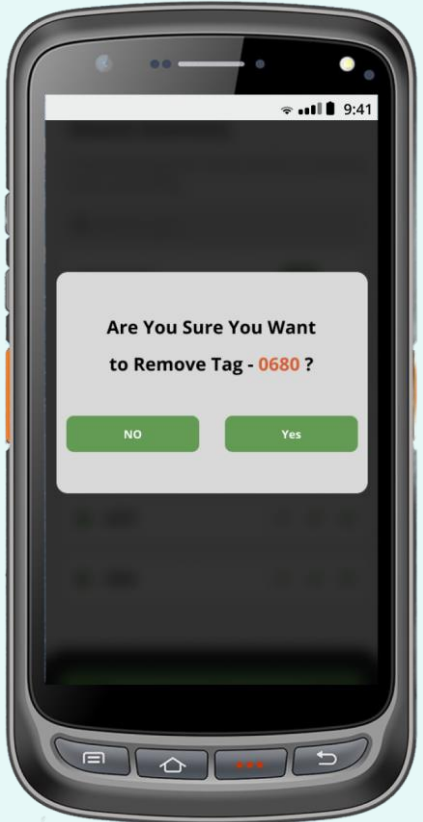
6A – INCOMING TRANSFERS

6B – OUTGOING TRANSFERS

Step - 13

After you have finished your session, select the option **"Add Animals to Inventory"** and confirm to complete the session, which will help you to add all the animals to the **"Inventory"**. Also, you can see that successfully added a pop-up message

And also, that animals added to **"Unassigned Pen"** from there you can move animals to specific pens
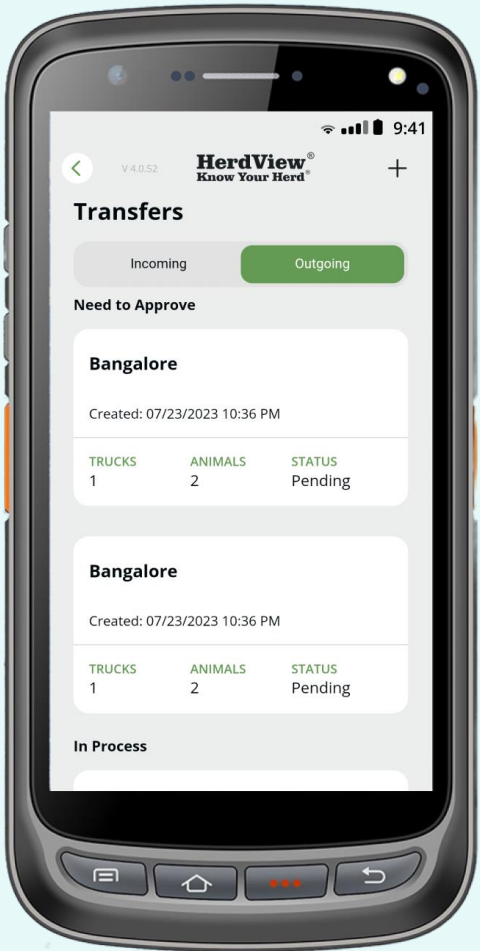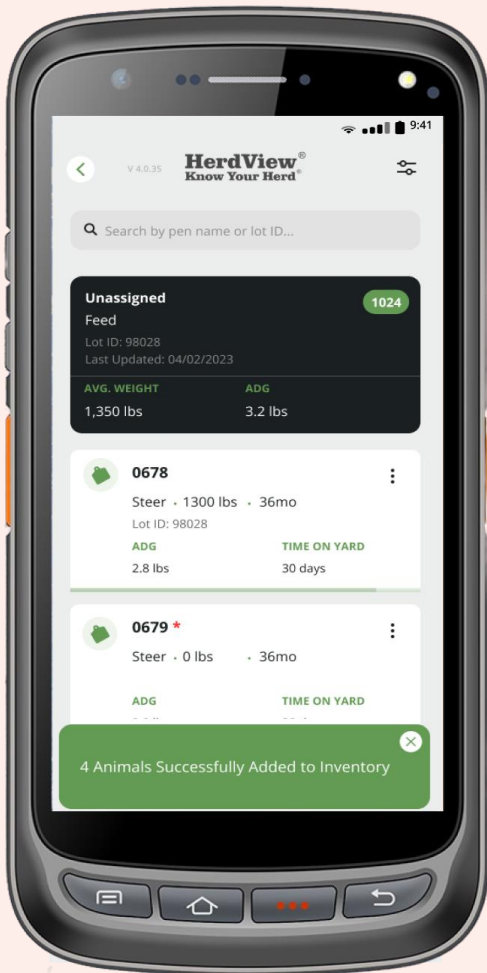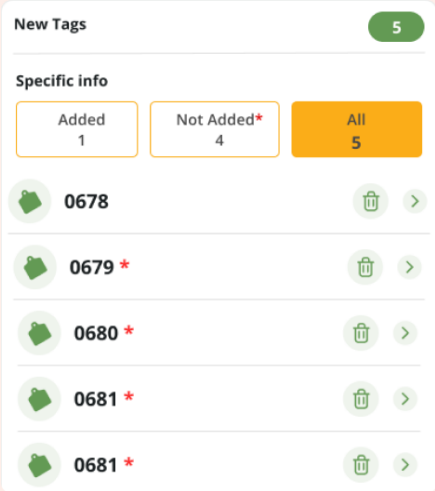
To view outgoing transfers, toggle the **"Transfers"** bar to the green **"Outgoing"** bar. Please note, all cattle leaving your site must be approved by the **'Shipped To"** organization before a transfer can be completed.

Approve a shipment by tapping the white shipment card and selecting **'Approve'**, just like you do with incoming transfers (as outlined above).

To create an outgoing transfer, tap the **'+'** icon in the upper right-hand corner.

6B – OUTGOING TRANSFERS

Begin by selecting a participating HerdView® organization **"To Another Site"** (or **"To Another Organization"**) to ship to under the organization name field (simply tap to browse/search names). Tap **'Save'** to continue.

Next, on **"Select Pen/Pasture"** page select the pen or pasture you are creating a shipment from.   The green oval provides the number of animals in the pen. You will also see the Lot IDs, date last updated, pen average weight and ADG. If you want to transfer number of animals less that the total pen amount then you will need to move the animals you do not want to transfer out of the pen into another pen using "Move Animals" function

Note that selecting a pen will select all animals inside of that pen, you cannot select portions or individual animals from a pen or pens.

Tap the **"green arrow"** to continue.

6B – OUTGOING TRANSFERS
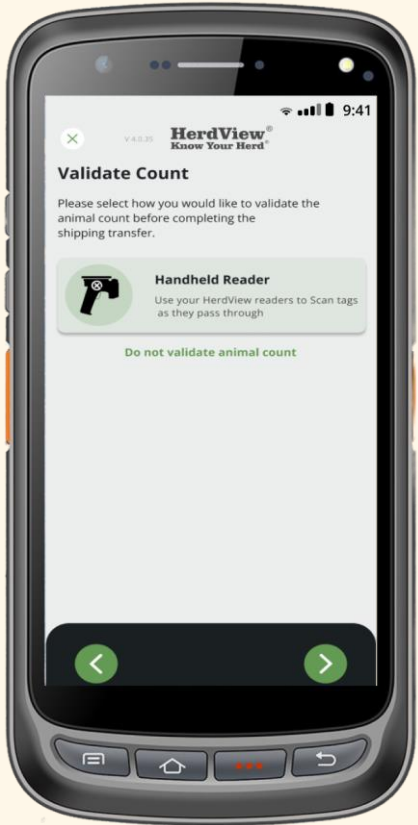
Next, you will have the option to validate the number of animals in your outgoing shipment. Select your preferred method of scanning and tap the green **'Arrow'** button.

This workflow is the same as the Counting Sessions workflow covered in Section 7 on Validating Counts. Please review it if necessary.

Once you have scanned your animals, you'll arrive at your **"Session Summary"**.

You will be provided with number of tags scanned and the total pen count. This is provided to help you initially identify any potential differences, errors, or issues. You can also search by tag ID or secondary ID.

To edit or remove any animals, tap the **"three dots"** in the right-hand corner of an animal ID card. After you have finished your work, tap **'Next'** to continue.

If you click **"Save"** that will take you to **"Transfer Summary Screen"**.

If there are any errors, such as missing or duplicate tags, you will see the problem tags on **"Issues"** page. Issues will be listed with red error markers. You must tap on each issue and resolve them before being able to create an outgoing shipment.

Tags marked as **'Missing'** are animals that are supposed to be in the selected pen but were not scanned, and tags marked as **"Unexpected"** are animals that are not assigned to the pen but were scanned. Totals are provided for each type of issue.

For **"Missing"** tags , you can mark as scanned (for example, if the reader missed the tag and you can confirm the animal is in the pen), or you can choose to remove the tag from the shipment. Just tap the appropriate action on the screen.
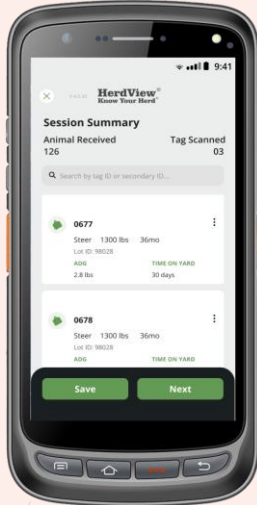
Once you have resolved all missing or **"Unexpected"** tags, return to your Session Summary. If the session is complete tap the green **'Next'** button.

6B – OUTGOING TRANSFERS
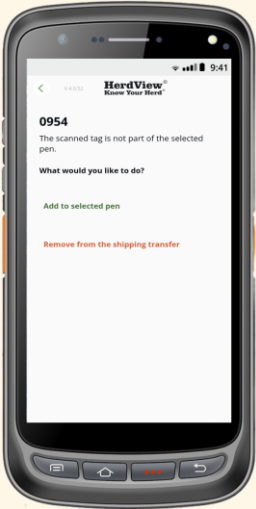
For **"Unexpected"** tags, choose to either **"Add the animal to the selected pen"**, or **"remove the tag from the shipping transfer"**. Just select the applicable option.
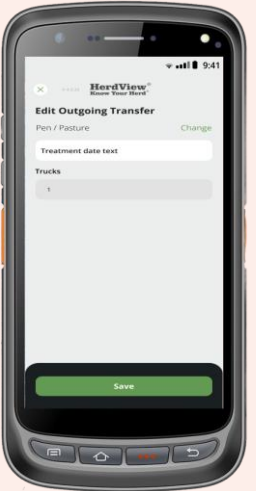
Next, you will enter the number of **"Trucks"** your shipment contains. Tap **'Create Shipping Transfer'** to continue.

After you click on **"Save"** button that will take you to **"Transfer Summary Screen"**.

6C - NON HERDVIEW® OUTGOING TRANSFERS
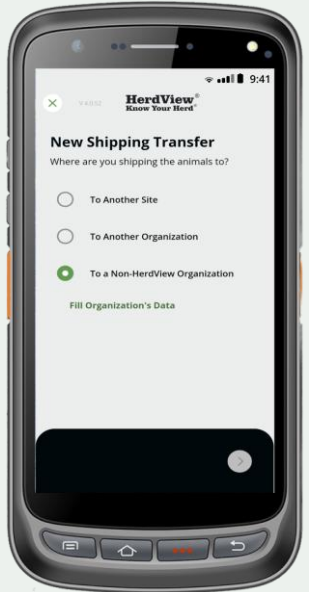
When creating an outgoing transfer for a recipient that exists outside of the **HerdView®** organization, select **'To a non HerdView Organization'** from the **"New Shipping Transfer"** page The proceed by hitting the **"Arrow"** at the bottom of the page.

On the next page we will be able to **"Fill Organization's Data"** - which is information about where you are shipping the animals to.

You will then need to fill out all of the required information for the recipient of the shipment.

When you are done hit **'Save'** box at the bottom of the screen and then continue through the rest of the workflow as outlined previously in this guide for **"Outgoing Transfers"**.
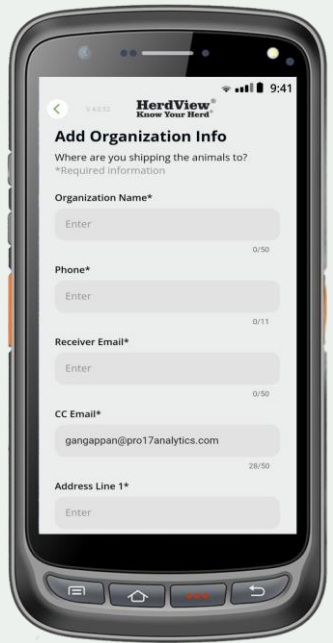
FAQ's

1. **Does the application work for iPhone and Android devices?**

   Yes, the application works for iPhones and Androids. You can find the 'HerdView® App' on the Application Store and Google Play Store.

2. **Can I use the application on a tablet?**

   You can use the application on a tablet, but the screens are not yet optimized to fit.

3. **Can I use the application on my computer?**

   No, In the near future a desktop version of the application will be made available to users"

4. **Is the application free to download?**

   Yes, the mobile application is free to download but only approved registered customers can use the app.

5. **How many users and sites can I have in my organization?**

   You can add as many users as you want to your organization. There are also no restrictions to the number of sites per organization.

6. **Does the app integrate with any other software programs, breed association databases, or equipment (scales, etc.)?**

   No, at this time the application does not integrate with other software application, In the near future with application will integrate with weather app and scale app.

7. **Can I track cattle that are in a process verified program with the HerdX software?**

   The current application version does not include the feature to track process-verified program cattle. You can add notes to individual animals with the program information. user can manually type in the 15 digit USDA tag ID to associate with the HerdX tag.

8. **Do the application and readers read other tags?**

   No, but you can track secondary IDs within the application.

9. **How many pens/pastures can I have within the application?**

   There are no restrictions to the number of pens/pastures in an Organization.

10. **How many cattle am I allowed to have in the application?**

    There are no restrictions to the number of cattle in an Organization.

11. **Can I export data from the application?**

    Yes, you can export data from the application. Users will receive an exported file through registered email.

12. **Can I import data into the application?**

    No, we do not support this functionality at this time, but this functionality will be included in future releases.

TROUBLESHOOTING

Mobile Application

Troubleshooting Issues and User Steps to Address:

- Mobile Application Crashes or Goes Black
- Mobile Application Will Not Open
- Mobile Application Will Not Respond
- Mobile Application Has Grey Screen

A. Restart Your Phone

1. Press your phone's power button. On the screen, tap Restart.
2. Open the HerdView® application and login.
3. Check that the issues have been resolved.

B. Check for updates for HerdView® Application

1. Press your phone's power button. On the screen, tap Restart.
2. Open the HerdView® application and login.
3. Check that the issues have been resolved.

To update your application:

- Go to HerdView® application "Settings" and scrolling down to the bottom. At the bottom you will see "Version and Build No."
- Compare that Version and Build No to the numbers listed on Google Play Store or Apple App Store.
- Google Play Store - click on "About this App" and the numbers that appear there should be the same as numbers in app Settings.
- Apple App Store - the version numbers will be on the front page.

C. Reset HerdView® Application Cache (Android)

1. Go to Settings > Apps > HerdView > Storage > Clear Cache
2. When the cache is cleared, the Cache Space 0 B.
3. Exit Settings and reopen the HerdView® application on your phone.
4. Check that the issue has been resolved.

D. Reset HerdView® Application Data (Android)

1. Go to Settings > Apps > HerdView > Storage > Clear Data
2. When the cache is cleared, exit Settings, and reopen the HerdView® application on your phone.
3. Check that the issue has been resolved.

E. Delete the HerdView® application and reinstall app

For Android:
1. Delete the app on your Android by holding on the application's icon for a couple of seconds then drag to the top right-hand corner to Uninstall. When prompted with "Do you want to uninstall this app?" select "OK".
2. Then launch Google Play Store app.
3. Search for HerdView® application then tap the install button to reinstall.

For IOS (Apple):
1. Delete the application on your iPhone by holding on the application's icon for a couple of seconds (hold until the icons start wiggle), then tap the x in the top left corner of the application icon, then tap Delete.
2. Then launch the App Store app.
3. Search for the HerdView® application and tap the download button to reinstall. Wait for the application to download and install.

TROUBLESHOOTING

Additional Troubleshooting - If the App Freezes or Screen Goes Black Closeout the app and reopen the app.

iPhone:

Step 1: Swipe on the screen to show all open apps (if you have an older iPhone you may need to double tap the home button)

Step 2: Swipe up one more time on the app and close out

Step 3: Reopen the HerdView® app.

Android:

Step 1: Tap your phone button to display all open apps. For Android phones without buttons follow same steps as for iPhone above.

Step 2: Swipe up on the HerdView app to close it out.

Step 3: Reopen the HerdView app (you should still be signed into last place you left).

HerdView® Smart Reader

A. Unable to Connect to HerdView® Smart Reader

1. Check for Bluetooth Connection

   - Navigate to your phone settings
   - Check your connections to ensure Bluetooth is turned on

2. Check for Phone Location Turned On

   - Navigate to your phone settings
   - Check Locations to make sure it is turned on

3. Check App Location Permissions

   - Navigate to your phone settings
   - Find your Apps
   - Select the HerdView® application from the list
   - Find the application permissions
   - Check to see if location is allowed

B. HerdView® Smart Reader Will Not Power On

Use the following steps:

- Press and hold power button for three (3) seconds.
- If that does not resolve the issue, then plug the reader into the power supply and allow time to charge.

If any of the above issues persist or you have other questions or issues, please contact HerdX® Customer Tech Support at:

Email: techsupport@herdx.com
Telephone: (833) 437-3987

GLOSSARY

"Absent" Monitoring Alerts
An alert that triggers when the activity through Area Monitoring functionality determines that the animal was not seen in the past 24 hours. When an Alert is triggered, the Alert will be sent to all users assigned the Site/Location the animal is assigned to.

Alert
A prompt that signals the detection of an anomaly. When an Alert is triggered, the Alert will either go a particular User or the entire Organization. Only alerts with initial release will relate to area monitoring and "Absent Alerts."

Animal
Refers to individual livestock – managed within the Application.

Animal Tag ID
A numeric identifier specifically associated with one particular animal.

Anomalies
Within the Application, any animal activity or behavior that deviates from the standard/default or defined threshold set by the Organization/User.

Antenna Transmit Power
Within the Application, the defined amount of power (in watts) of radio frequency energy that the transmitter produces as its output. Setting within the Application. Referred also as "reader range."

Area Type
Includes either a "feed" or "water."

Assigned Tasks
Tasks that have been assigned to a specific User in the Application.

Area Monitoring
The HerdView® proprietary system that actively monitors each animal's movements to and from water or feed troughs, alerting operators to the early warning signs of potential sickness.

Cattle Count
During counting session, represents the animal tags that were scanned and counted during the specific count.

Cattle Tags
A physical animal ear tag used to identify livestock. The tag will typically have a numeric identifier specifically associated with one particular animal.

Chute
A narrow corridor built for cattle that separates the animals from the rest of the herd and allows handlers and veterinarians to provide medical care or restrain the animal for other procedures.

Common Information
When assigning attributes to an animal, the User can assign specific attribute information to a group of animals. As an example, information would include weight, breed, sex, lot ID, breeder, date of birth, etc.

Counting Sessions
A specific inventory activity that allows the User to count inventory of animals quickly and effectively in a specific location (e.g., pen, pasture), and moving from one location to another. A counting session can be for entire pen/pasture or as otherwise required by the Organization.

GLOSSARY

Delete Tag
An action that deletes a tag number from the organization's inventory. Deleted tags are defined either as a "Soft Delete" or "Hard Delete."

A "Soft Delete" includes:
Death
Theft
Lost or damaged tags
Sold
Missing

In theses cases the system removes the tag from inventory but maintains all data records/ history.

A "Hard Delete" includes:
Accidental scan

Deleting this kind of tag permanently removes the tag from the database (no history) and the tag can be used again.

Detected Alert
An alert that triggers when the activity through Area Monitoring functionality determines that the animal has been seen in the past 24 hours.

Detection - Close
Animal detection by tag scan whereby the device will only detect the tags that pass below the reader. Recommended for capturing one animal in a chute.

Detection – Wide
Animal detection by tag scan whereby the device will detect all the tags that are in the range. Recommended for monitoring animals at troughs or bunks.

Detection – Max
Animal detection by tag scan whereby the device will maximize the range for detection for animals passing through an area. Recommended for counting animals passing through gates or alleys.

Device
Handheld mobile device that has a display screen with touch input. Can include tablets or smartphones. HerdView® has been developed for both iOS and Android use.

Edit
Any User activity in the Application that modifies information/data from its current state.

Email Notification
An electronic message sent to a User advising of some event or activity.

Enclosure
An enclosure can be a pen or a pasture within a site / location. There can be many enclosures within a site / location.

Export Data
Ability to extract and convert raw data from to HerdView® Application system into a format (such as CSV file or excel file) into a format required by a third-party.

Feedlot/Feed Yard
Typically, the final location during the cattle production prior to going to the processor. Feedlots are concentrated animal feeding operations and intensive livestock operations or confined feeding operations. Typically, they will contain thousands of animals in array of pens.

GLOSSARY

HerdView® Cattle Tags
Ultra-High Frequency (UHF) RFID cattle tags provide the most accurate, reliable livestock tracking, counting, inventory, transfers and other inventory management capabilities.

HerdView® Mobile Application
HerdX® proprietary user-friendly herd management application for the livestock industry that works on Android & iOS. The application is designed leveraging leading cloud frameworks that dynamically scale performance as more users are onboarded.

The simple and intuitive HerdView® app makes herd management easier than ever. With real-time monitoring, tasks, transfers and counting data, plus Intelligent Area Monitoring alerts at your fingertips, it is like putting a new cowboy to work, right in the palm of your hands.

> **Select features/functionality:**
> - Scan RFID cattle tag QR codes at set up
> - Monitor animal movement 24/7
> - Receive alerts to anomalies in animal behavior
> - Add tasks and track transfers
> Review and update livestock inventory

HerdView® Smart Reader - "HSR" or Reader
Proprietary reader With the latest in high-speed cloud-connected tech built in, solar-powered smart readers deliver 24/7 monitoring—no Wi-Fi, server or wired power-source required

History
All recorded activity for an animal in the Application that is stored in the database.

Incoming Transfer/Incoming Shipment
When incoming transfer is approved, the resulting activity is a notification of a transfer to the recipient of the transfer - if transfer with a HerdX® Organization it is considered an incoming transfer and if outside of the HerdX® organization it is considered an incoming shipment.

Inventory
Refers to the animals (cattle) within an organization whether in total or individual.

Location
A place owned/associated with an Organization. For example, an Organization can have multiple ranch locations. The word "location" can be used interchangeably with the word "site." An Organization may have multiple locations.

Lot ID
Unique group ID – group of animals sorted by similar attributes.

Missing Tags
During counting session, animal tags that are not scanned and are deemed missing from the count of the selected pen/pasture.

Move
Specific action in the Application that changes the location of an animal within the organization. *Example: Move to Pen/Pastures.*

Notes
Comments that can be appended to certain data in the Application.

Notifications
An action notifying a User of an event or activity. A User can get notifications for one-time event or recurring events depending on the nature of the notification. Notification can apply to the Organization or application platform wide.

Example of one-time events: Organization wide notification - new release on application.
Example of recurring events: Daily processes - would include alarms, treatments due, tasks due.

GLOSSARY

Types of Notifications:
- Absent Alerts
- Detection Alerts
- Tasks Due Today
- New Task Assigned
- Overdue Task
- Treatment reminders
- Transfers

Notifications can be read, unread or deleted.

The Application will issue a Notification for each Alert type – which will include list of all animals in the pen/pasture that exhibits the anomaly behavior.

Organization
The business associated with the use of the Application. The name of the business is associated with the Organization.

Outgoing Transfer/Outgoing Shipment
After a transfer is approved, the resulting activity is a notification of a transfer to the recipient of the transfer - if transfer with a HerdX® Organization it is in outgoing transfer and if outside of the HerdX® organization it is considered an outgoing shipment.

Pasture
Large grassy fields where animals graze. Enclosed tracts of farmland grazed by livestock.

Pen
An enclosure for holding livestock.

Pen Transfer
Function that allows User to transfer some or all of the animals in one Pen to another Pen within an Organization. User can move animals to a new Pen/Pasture.

QR Code
A machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by a camera or smartphone.

Quick Actions
Gives the User the ability to select multiple items on a screen and apply the action to all the items on the screen. Example: Can select multiple animal tags on a screen and the action will be applied to all animal tags on the screen.

RFID
Radio Frequency Identification. A system comprised of readers + antennas (transceiver) and tags (transponders). RFID has several frequency ranges: Low Frequency (LF), High Frequency (HF), and Ultra High Frequency (UHF). LF is usually implied whenever RFID is mentioned in the livestock sector.

Scan
A general term for a physical scan/reading of a tag at a specific point that results in record being added to the database.

The "original scan" that brings a HerdView Tag into the HerdView system for the first time. A HerdView® Tag is only Origin Scanned once in its lifetime. The Origin Scan is accomplished in the HerdView® App either through the HerdView® Smart Reader, or by scanning the QR code on the HerdView® Tag with a mobile device camera.

Settings
Control panel in the Application that enables the User to configure actions or appearances in the HerdView® Application.

GLOSSARY

Site
Each "location" within an organization. Example, a ranch listed as Organization in the Application named "ABC Ranch" may own multiple feedlot locations. Each location is its own site.

Specific Information
When assigning attributes to an animal, the User can assign specific attribute information to an animal. As an example, information would include weight, breed, sex, lot ID, breeder, date of birth, etc.

Switch Site
User ability to go between locations within an Organization. Cannot switch to another Organization.

Tasks
A specific work activity to be done or undertaken.

Task Details
The detail that is associated with each task. Would include the following information:
- **Task Title -** Short name for the Task
- **Task Description -** detail information about Task to be performed
- **Assigned -** Application User assigned to
- **Date Due -** Expected date Task should be completed

Transfers
An activity in the Application that moves animals from one location to another whether inside the Organization or outside of the Organization.

Transfer Email Notification
An electronic mail notification that is triggered when a HerdView organization transfers animals to a Non HerdView user.

Treatments
User has the ability in the Application to record various treatments given to an animal in the system – treatments can be medicines, etc.

UHF
Ultra-High Frequency – designation for specific radio frequency.

Unexpected Tags
During counting session, animal tags that are scanned that do not belong to the assigned inventory for the selected pen/pasture. Animal tag does NOT belong to the specific pen/pasture.

User
An individual authorized and granted access to the HerdView® by the HerdX Systems Administrator. Users may have varied levels of authority/permissions within the HerdView® Application.

Validate
When assigning attributes to an animal, the User can assign specific attribute information to an animal. As an example, information would include weight, breed, sex, lot ID, breeder, date of birth, etc.

Water Monitoring
User ability to go between locations within an Organization. Cannot switch to another Organization.

Weight
A specific work activity to be done or undertaken.