Gatekeeper Agronomist

Setup & Quick Start Guide

Agronomist Edition

Gatekeeper Version 3.5 – June 2016

www.farmplan.co.uk 01594 545022 Gatekeeper@farmplan.co.uk

Contents

Introduction to This Guide

Welcome to the Gatekeeper Agronomist software system from Farmplan Computer Systems.

This guide is intended as a quick start-up guide to Gatekeeper for new users, who are either: starting from scratch, converting data from MultiCrop Agronomist version 3 or importing client's MultiCrop or Gatekeeper data.

The guide is split into two parts. Part 1 covers Gatekeeper installation, setting up new client businesses, converting existing data and an overview of Gatekeeper's layout and screen conventions. Part 2 deals with the program modules and the different tasks which can be carried out within Gatekeeper Agronomist.

This is a quick start-up guide and is designed to be used in conjunction with the detailed embedded help which can be accessed by clicking the on-screen Help icon (see below) which appears on every screen within Gatekeeper.

 The icon with the question mark takes you to the embedded detailed help. You can also ring the Gatekeeper support line if required – 01594 545040.

NB: Within the guide, any words in **bold type** indicate a button to be pressed and ►indicates the next step in a process.

Part I

Installation

Gatekeeper will take about 30 minutes to install, depending on the speed of your machine. Before you begin, please make sure that you have an internet connection (this will be used to check and register your authorisation, download updates and synchronise your databases), and the access code, which is provided with the installation CD.

Note: Gatekeeper uses components of the Microsoft operating system framework. Therefore it is essential that all Microsoft components are updated with the most current versions before installing Gatekeeper. If your PC is configured to accept automatic updates from Microsoft it is likely to be up to date. If you are in doubt, please consult your system administrator or call the Gatekeeper Helpdesk.

1. **Windows Vista, Windows 7 and Windows 10** - Put the most recent Gatekeeper CD into your machine's CD drive, it should autorun. If it doesn't, then you will need to click **Start** (bottom left of screen), and then in the 'search programs and files' box at the bottom of the start menu, type **run**. Under programs at the top of the start menu the run application will appear, click **Run** to open.
   In the Open box, type D:\GK Setup.exe (D: represents your CD drive). Then click **OK.**

   Windows 8 (8 RT is not supported) – Put the most recent Gatekeeper CD into your machine's CD drive, it should autorun. If it doesn't, then you will need to open the Charm Bar by moving the pointer to the top right of the screen. Click the **Search** icon, (the top most of the Charm Bar icons), type **run** and press Enter. The run application will then appear.

   In the Open box, type D:\GK Setup.exe (D: represents your CD drive) then click **OK**.

2. Before the Gatekeeper software is installed, one or more other components will need to be automatically installed on your machine, so click **Next** at the 'Gatekeeper Installer' window. These components may take a while to install so it would be worth familiarising yourself with some of the conventions used within Gatekeeper while they load (see page 8).

3. When Gatekeeper is ready to be installed, click **Next** and you will be taken to the 'Gatekeeper License Agreement' window. Select the radial button accepting the terms and click **Next**.

4. Now three options will appear Typical, Custom and Complete. Chose <u>Typical</u> for the Standalone Edition (recommended for most users); Custom for Network Edition (Server and Client) or Standalone with specified location (Advanced) or Complete for all available versions (subject to licensing), this will require the most disk space.

5. In the next screens you just need to click **Install** so that Gatekeeper will be installed into a Reed Business Information folder on your hard drive.

6. After Gatekeeper has been installed, click on **Finish.** There will now be a Gatekeeper icon on your desktop.
7. Double click on  to open the program and start the registration process.

   A login window will appear asking you to enter the following details:
   User Name: it's best to use your name as this name will be used throughout the program and will be printed on reports and work plans (don't use a nickname if you don't want it to be made public!)
   Password: this is optional, but if you do enter a password make sure you don't forget it; you will need it every time you open Gatekeeper. The password is case sensitive.
   Access Code: this code is provided by Farmplan, along with the CD.
   Click **Log On**.

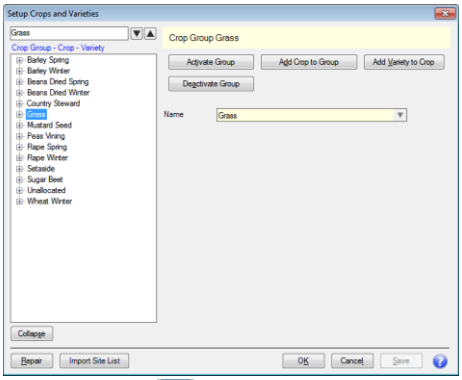
8. The 'Synchronisation' window will appear. You just need to click **Synchronise.** The software will now use your internet connection to check your registration details, authorise your copy of Gatekeeper and download any updates to the program or Sentinel data (see page 75).

9. When Gatekeeper has finished synchronising, click **Close**. At the 'Add Business' window, you may have several choices: 'Add a new business', 'Import a business from MultiCrop' or 'Import a business from Amais' for example.

Before walking you through these options it's best to introduce you to the basic format of the setup process in Gatekeeper, because at some stage everyone using the program will need to setup new details, such as products, split fields, etc.

Basic Conventions within Gatekeeper

The look and feel of Gatekeeper is consistent throughout, making it easy to find your way about. Below are some examples of the formats used within Gatekeeper, with an explanation of how they work.



This screen shot is taken from the 'Setup Crops and Varieties' window. As you can see on the left hand side there is a 'tree view', which gives you an overview of the categories and headings within your Gatekeeper program (these will either be pre-loaded or you will have created them from scratch). If you want to see what is included under each category or heading you need to either click ⊞ next to the item or double click on the item to expand the list; to close the list click ⊟.

By working through the tree view, you can click on the item you want to work with and it will be highlighted in blue. Once an item is highlighted, any details associated with the item are displayed on the right. In the above window, you can see 'Grass Seed Crop' ready for editing.

In the bottom right corner you have the Gatekeeper Help options, which can be found throughout Gatekeeper. Just click on them to access help.

Also at the bottom are these buttons, which govern how your work is saved throughout the program:

When you click **OK**, any changes that you have made will be saved and the form closed. When you click **Save** any changes made will be saved and the form will remain open. When clicking **Cancel** a warning sign will appear – use this option with caution as you will lose any changes since you last clicked **Save** or **OK**.

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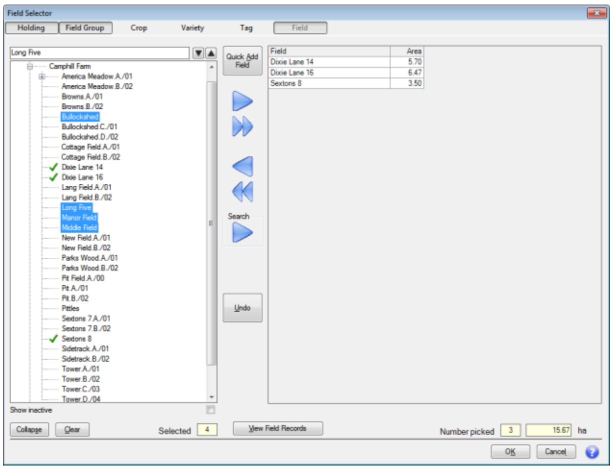
gatekeeper

This screen shot shows a ‘Selector’ window, which is found throughout Gatekeeper. To select items, you need to highlight a choice(s) in the tree view and use the blue arrows to transfer them to the selection box on the right. One arrow in either direction transfers the highlighted item(s), and the double arrows in either direction transfer all the items whether highlighted or not.



Setting up Client's Data within Gatekeeper

There are four ways of creating client businesses within Gatekeeper:

- Creating a new client business from scratch.
- Importing data from your MultiCrop Agronomist program.
- Importing data from a client's MultiCrop program.
- Importing data from a client's Gatekeeper program.

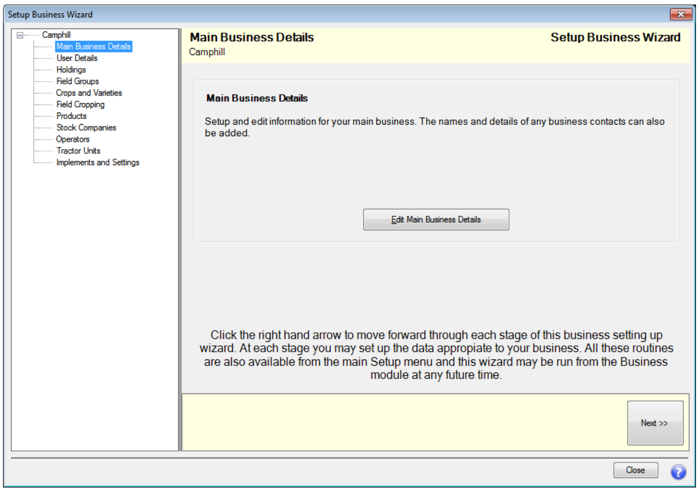
Setting up from Scratch

1. Choose **Add a new business** in the 'Add Business' window (if this is not on the screen, click the **Business/Year selector** in the top right hand corner of the main Gatekeeper screen ► **Add New Main Business**). Click **OK**.

2. Within the 'Setup Businesses' window, your client's business name will be set by default to 'new'. To replace this, click in the **Name** box and replace 'new' with your client's business name.

3. If you are intending to email recommendations to this client, then you will need to click **Setup Contacts** ► **Add**. Fill in the Contact name box, their address details and, within the '**Details**' tab, their email address (this is essential). You will also need to create a publishing key for this client if they are using Gatekeeper (see page 45) within the Publishing module section for instructions). Click **OK**.

4. Returning to the 'Setup Businesses' window, click **OK**.



5. The business name will now appear in the 'Setup Business Wizard' at the top of the tree view on the left (see above). Under this name are the setup headings that are available in Gatekeeper – you need to input your client's business details into these

headings. To move though the headings you can either select them from the tree view or click **Next** or **Previous**.

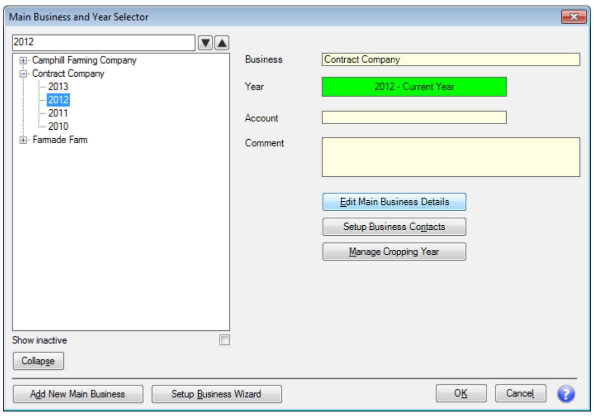
To begin with, it will only be necessary to concentrate on the following headings:

Crops and Varieties: Set up Crops and Varieties in your catalogue first (see page 22). To import the catalogue lists into the client business go to the **Setup** menu>**Crops and Varieties**. From this window click **Import Site List** or **Import Organisation List** to populate the client business with the crops/varieties that exist within your Site or Organisation catalogue.

N.B: For a full explanation of the catalogues held within Gatekeeper, please see the Catalogue Module section. If you don't have access to an Organisation list of crops/varieties, and have not yet set up a Site list of crops/varieties you will need to set up a Site list within the Catalogue Module before continuing (see page 22). When you wish to return to the 'Setup Business Wizard', click on the **Business/Year selector** in the main Gatekeeper window, and click **Setup Business Wizard**.

Field Cropping: This section allows you to setup your clients' fields and allocate their cropping (assuming that you are not importing their field records either from Gatekeeper, MultiCrop or a compatible third party software). For more details, see 'Setting up and Amending Fields and Cropping' in the Fields Module section (page 55). If you are going to exchange data with your client, it is essential that the field names and the working areas of each field are identical in both your and your clients programs.

1. When you have either completed the setup, or finished part of your setup you will see the 'Main Business and Year Selector' window (see below). As you build Gatekeeper records you will be able to view different years from here by highlighting the year you want in the tree view (you will also use this form to move between clients). Make your selection and click **OK**, to go to the main Gatekeeper screen.



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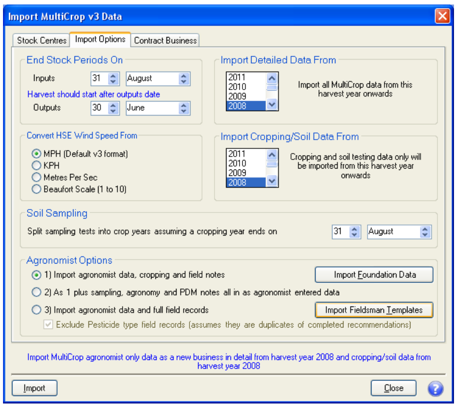
Setting up by importing from MultiCrop Agronomist data

(MultiCrop Agronomist must be on the same computer as Gatekeeper Agronomist – if this isn't the case, please call the support helpline - 01594 545040

<u>Before importing any data</u>: If you are converting MultiCrop Agronomist version 3 data it's important to check that your MultiCrop business years are linked correctly with the STAN years, and that your crops/varieties are also correctly linked, otherwise your data will be converted incorrectly. To do this: open up MultiCrop **►Update Summary** (the Σ module button) **►Reports ►MultiCrop**. This will give you the 'STAN Data Audit' report. If there are any discrepancies in the years or crops/varieties, then please ring the support helpline for assistance - 01594 545040.

2. Choose **Import a business from MultiCrop Version 3** in the 'Add Business' window (if this is not on the screen, click **Business/Year selector** in the top right hand corner of the main Gatekeeper screen ► **Add Business**). Click **OK**.

3. The 'Import MultiCrop v3 data' window will appear, listing the MultiCrop stock centres (clients) which are held on your computer (default is within C:\ drive). Highlight the client you want to import and then select the '**Import Options**' tab (see below).



4. There are several points to be noted on the '**Import Options**' tab:

   a) You can choose how much MultiCrop data you import by selecting the years of detailed data and years of cropping that you require (top right). It's automatically set to convert the current year and two previous years of detailed data and cropping, but if you want to select more past cropping, for example, then you can. **Detailed data** includes all of the recommendations, imported operations and soil analysis etc. whereas, **Cropping/Soil data** only includes the crop/variety and the soil sample history. This gives you the flexibility to bring forward a few recent full years but retain the whole crop and sample history.

   b) Next you need to decide how much of your Agronomist data (recommendations and field data) to import into Gatekeeper. Choose the best option from the 'Agronomist Options' at the bottom of the box. Click **Import** and your client's

MultiCrop data will be converted and imported into Gatekeeper, along with your recommendations.

I. **Import agronomist data, cropping and field notes** – brings in agronomist recommendations, field cropping, and notes.
II. **As 1 plus sampling, agronomy and PDM notes all in as agronomist entered data** – these data types are also brought in as though they were entered by the agronomist even if they were imported from customers.
III. **Import agronomist data and full field records** – brings all data across including imported customer records. If you choose this option you should probably elect to exclude the pesticide type field records as they are likely to have corresponding recommendations giving duplicate records

c) Then you need to import your MultiCrop Foundation data (if you had this option) and your Fieldsman Templates. In turn, click **Import Foundation Data** (only available if you had the foundation module) and when this is complete, click **Import Fieldsman Templates**. You only need to import these **ONCE; do NOT do this step for each client**. Check through these lists to make sure that all the data converted correctly.

N.B: If you have an Organisation catalogue in Gatekeeper and you are the Catalogue Manager, the Foundation data will be imported to the Organisation catalogue (see page 22 for more on catalogues). If you do not have an Organisation catalogue in Gatekeeper, the Foundation data will be imported into your Site catalogue assuming that YOU managed the MultiCrop Foundation Data.

If you did not manage the MultiCrop Foundation Data, the conversion of this data will be completed by another member of your organisation and sent to your Organisation catalogue during synchronisation. Fieldsman Templates are imported to the Site catalogue, becoming Site Templates.

5. Once happy that the client's business details have also been imported successfully – check the field details in the Fields Module (page 54) and the recommendations in the Recommendations Module (page 29) – you should synchronise or backup your data (page 73) before you import another client business.

Setting up by importing from client's MultiCrop data

<u>Before importing any data</u>: Please ask your client to check that their MultiCrop business years are linked correctly with the STAN years, and that their crops/varieties are also correctly linked, otherwise the data will be converted incorrectly.

To do this: open up MultiCrop ▶**Update Summary** (the Σ module button) ▶**Reports** ▶ **MultiCrop**. This will give them the 'STAN Data Audit' report. If there are any discrepancies in the years or crops/varieties, then please ask them to ring support for assistance.

1. Choose **Add a new business** in the 'Add Business' window (if this is not on the screen, click on the **Business/Year selector** in the top right hand corner of the main Gatekeeper screen ▶ **Add Business**). Click **OK**.

2. Within the 'Setup Businesses' window, your client's business name will be set by default to 'new'. To replace this, click in the **Name** box and replace 'new' with your client's business name. It is helpful, but not essential, to have the same business name that the client uses.

3. If you are intending to email recommendations to this client, then you will need to click **Setup Contacts** ▶ **Add**. Fill in the Contact name box, their address details and, within the '**Details**' tab, and their email address (this is essential). You may wish to add their publishing key as well if you intend to publish recommendations to them (see page 46). Click **OK**.

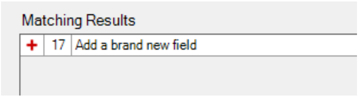
4. Returning to the 'Setup Businesses' window, click **OK**.

5. Click **Close** at the 'Setup Business Wizard' window to return you to the 'Main Business and Year Selector' window.

6. Ask your client to export their MultiCrop data: **Field Records** ▶ **Actions** ▶ **Data Export** ▶ Choose 'Gatekeeper Agronomist' export format ▶ Choose the appropriate export options ▶ **Export**. This should be either emailed to you or transferred to a USB memory stick.

7. To import this data into Gatekeeper: make sure you are in the correct client business within the 'Main Business and Year Selector' window, click **OK** ▶Go to the **Publishing module** ▶ **Third Party** tab ▶**Import Field Data** ▶ Browse to and select the exported .zip file using the picker button . Ensure the File Format is set to MultiCrop Plan File and click **Import** ▶ At the 'Import

   Published Data' window **<u>make sure that you are importing this data into the correct client's business</u>** then select the option to 'Full import of ALL field data' ▶**Import Data**. Within the 'Match Publication Fields Pre Importing' window, ensure the matching results says 'Add a brand new field' as shown in the image on the right and click **Import.**



8. Once you are happy that the client's business details have also been imported successfully – check the field details in the Fields Module (see page 54) – you should synchronise to make a secure backup of your data (Data Secure option required) (see page 73).

Setting up by importing from Client's Gatekeeper data

1. Choose **Add a new business** in the 'Add Business' window (if this is not on the screen, click on the **Business/Year selector** in the top right hand corner of the main Gatekeeper screen ► **Add Business**). Click **OK**.

2. Within the 'Setup Businesses' window, your client's business name will be set by default to 'new'. To replace this, click in the Name box and replace 'new' with your client's business name. It is helpful, but not essential, to have the same business name that the client uses.

3. Returning to the 'Setup Businesses' window, click **OK**.

4. Click **Close** at the 'Setup Business Wizard' window to return you to the 'Main Business and Year Selector' window.

5. You now need to exchange Publishing Keys with your client (see Publishing Module page 45).

6. Having created, exchanged and saved the appropriate Publishing Keys, ask your client to publish their cropping to you: **Publishing module** ► within the '**Outbox**' tab, click **Publish Field Records** ► Select you as the contact using the selector button ► Choose the appropriate field groups ►**OK**.

7. **The client** should then synchronise OR choose to 'Distribute Locally' to copy the file to a USB memory stick.

8. On **your** computer, choose the client in the 'Business and Year Selector' window.

9. Either:
    a) Synchronise (if the client sent the data by synchronisation) and then go to the Publishing module ► Within the '**Inbox**' tab, highlight the published data in the grid and click **Import Published Data** ► In the 'Import Published Data' window make sure that you are importing this data into the correct business, then select the option to 'Full import of ALL field data' and click **Import Data.** Within the 'Match Publication Fields Pre Importing' window, ensure the matching results says 'Add a brand new field' and 'Add a new cropping record '.Click I**mport.**

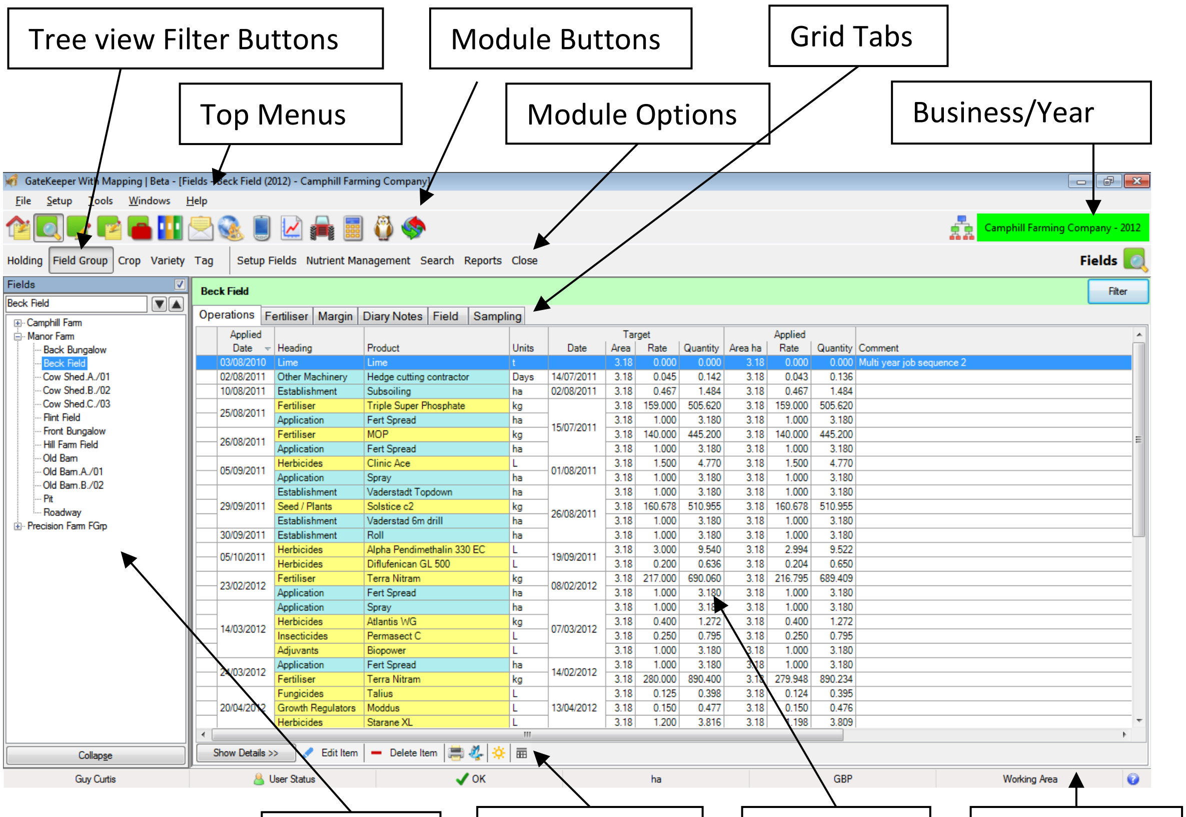
    Or:

    b) If the client transferred the data via USB memory stick, go to the Publishing module in the appropriate business ► Within the '**Inbox**' tab, click **Fetch Local Publication** ► Point to the file and click **Open** ► At the 'Import Published Data' window, make sure that you are importing this data into the correct business then select the option to 'Full import of ALL field data' and click **Import Data.** Within the 'Match Publication Fields Pre Importing' window, ensure the matching results says 'Add a brand new field' and 'Add a new cropping record ' click **import.**
10. Once you are happy that the client's business details have also been imported successfully – check the field details in the Fields Module (page 53) – you should synchronise or backup your data (page 73).

Gatekeeper Layout and Screen Conventions

Once you have your client's data within Gatekeeper you can begin to use the program. You should acquaint yourself with the main Gatekeeper layout, the screen conventions and an overview of the Modules within Gatekeeper first.

Below are the names that have been given to various parts of the main screen – they will be used throughout this guide.



Top Menus

File: - Log Off and Exit the program**.**

Setup: - Setup any new items here.

Tools: - The User Manager allows you to dictate who can use the program and what areas they are allowed to see/work in.

Options determine the way certain settings and functions are used for your business. It is also used for the customisation of Gatekeeper; such as report headers and colours etc.

Help: - Access Help menus and Support information.

The Module Buttons and Module Options

Orders: allows you to create, view and edit product orders based on recommendations.

Fields: browse records for individual fields, including field operations, soil sampling and buffer zone information, and setup fields and cropping.

Recording: Use to record field records <u>not</u> entered though the Recommendations Module.

Recommendations: allows you to generate recommendations for jobs that need to be done on clients' farms; verified by Sentinel Active.

Catalogues: you can view, organise and manage the products and crops/varieties used by your clients (and view those products within Sentinel).

Publishing: the place where incoming messages and data are received after synchronisation, and where messages and data to be sent are stored before synchronisation.

Devices: this module enables the exchange of data between Gatekeeper and in-cab controllers, handheld devices and other external software sources.

Analysis: allows you to create personalised reports across and/or within your client farm businesses.

Agrilator: contains a collection of calculators and conversion tools for units of measurement and others specific to agriculture.

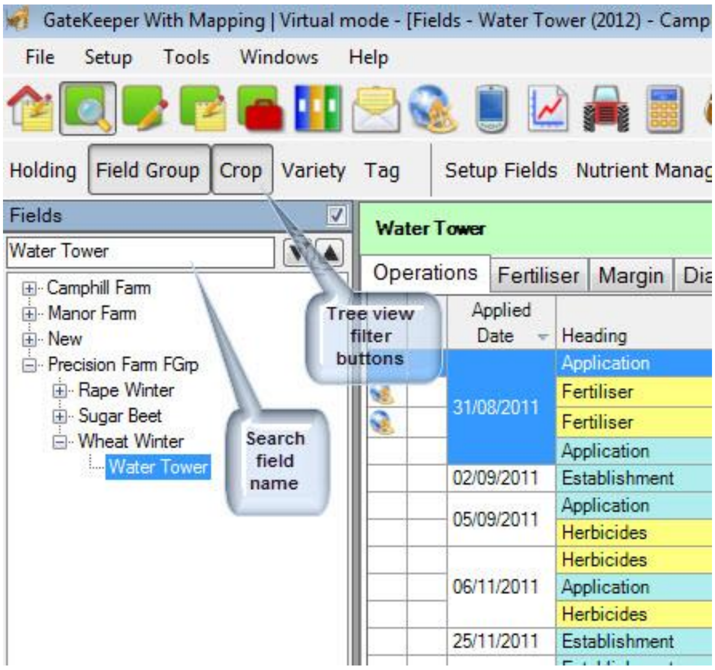
Sentinel: provides a wide range of agronomic, business and environmental information. Sentinel Active users will also receive detailed crop approval information for all UK pesticides.

Synchronisation: allows you to backup data, download program updates and Sentinel data, and send and receive publications.

Business: use to see and manage the business structure all in one place. Holds and records weather information and business Notes. Cropping years can also be managed within this module.

The Tree View, Filter Buttons and Search

How to navigate through the tree view has already been covered on page 8. The details that appear in the tree view can be sorted under different headings using the Filter Buttons. For example, the Fields Module tree view can be arranged by: Holding, Field Group, Crop, Variety, and Tag The search facility (the blank box above the tree view and below the filter buttons) allows you to find specific fields by typing the first few letters of the field name.



Status Bar

This ‘clickable’ bar allows you to: view the logged in user/s, toggle between hectares or acres and working area or official area, and shows warning indicators - ⚠ indicates a warning; click on the sign to get an explanation. The currency in use is also displayed on this bar.

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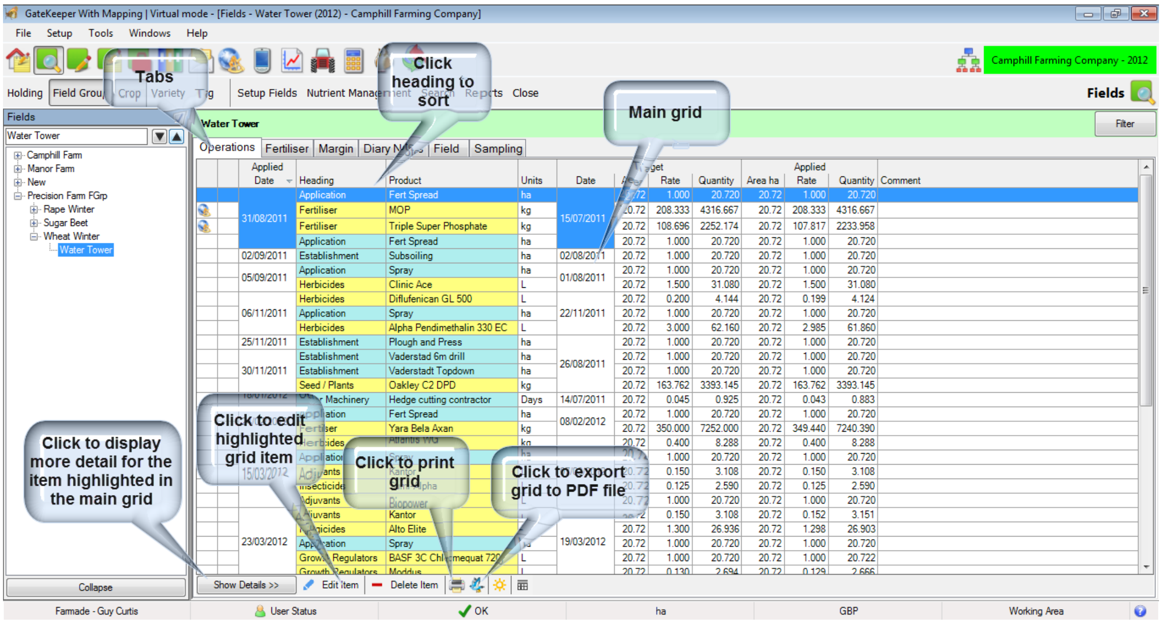
The Main Grid, Grid Footer and Grid Tabs

The Main Grid displays the details associated with the item highlighted in blue in the tree view. You can click on the Grid Tabs to view different aspects of data associated with the item.



Part 2

Catalogues Module

The catalogues within Gatekeeper Agronomist hold the information that might be shared across client businesses or even amongst a team of agronomists working collaboratively. Information contained in the catalogues can be used to create recommendations and setup client fields, such as crops/varieties, products, templates and comments. There are three potential catalogue types:

- *Organisation catalogue (optional) – users can elect to have this optional facility within Gatekeeper if they are part of an organisation with multiple sites. There is one designated catalogue manager who has full editing rights and other users are only able to view, and choose items from the catalogue. This catalogue is distributed and updated automatically during synchronisation and this allows for consistency in choice of products (including pricing), crops/varieties, user-defined reports, templates, comments and checks/protocols etc. across all sites in the same Organisation.*

- *Site catalogue – every Gatekeeper user has this catalogue. It enables you to set up your own templates, comments, products and crops/varieties to use across multiple client businesses on your Gatekeeper Site. You manage your Site catalogue independently of the Organisation catalogue but it has the facility to store similar data types (see below).*

- Sentinel catalogue – this catalogue carries all UK approved pesticide *information, such as pesticide name, LERAP details, active ingredient(s), SOLA's and MAPP ID numbers. When a pesticide is added to a business stock list, or to a Site or Organisation catalogue, it is usually picked from the Sentinel catalogue and linked accordingly, thus carrying the actives and other pesticide data which it will verify against assuming that you have purchased the optional Sentinel Active version.*

Setting up a Site Catalogue

You will certainly need to set up your Site catalogue if you don't have access to an Organisation catalogue – to include all crops and varieties, products to recommend, comments and recommendation templates you will use, which can be accessed by, and applied to any client business. However, if you ARE part of an organisation which has purchased the optional Organisation catalogue facility, you can add items to your Site catalogue that you need in addition to those in the Organisation catalogue (for example your own templates, comments and perhaps the odd product).

To setup Crops and Varieties in a Site or Organisation catalogue:

In the main Catalogue Module window select the appropriate catalogue fitter button ('Organisation' will be only be visible if you have the facility) and click the **Crops and Varieties** button.

1. The 'Setup Crops and Varieties list for – Site Catalogue' window appears. Within Gatekeeper, crops and varieties are organised into three tiers: Crop Groups (e.g. Wheat Winter), Crops (e.g. Feed Wheat, Milling Wheat), and Varieties (e.g. Chianti, Arran). Choose a Crop Group via Activate Crop Group, e.g. Wheat Winter, from the pre-defined list. A linked Crop will be created automatically; in this case, Wheat Winter. If you want to have your own Crop(s), e.g. Wheat Feed or Wheat Milling, etc, you can add these via Add Crop to Group. By clicking on the Crop in the tree view, you can then add varieties to each Crop via Add Variety to Crop.

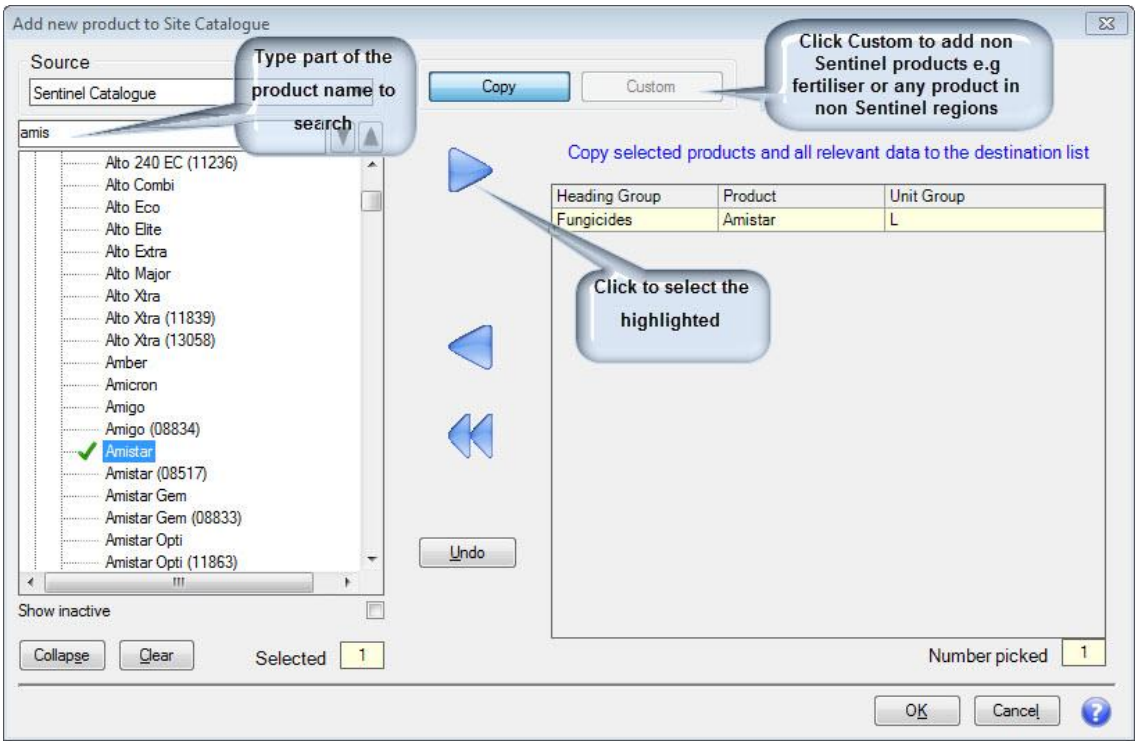
2. Click **Save** and repeat the process until you have finished inputting information. If you don't want to use the Crop name created by default when you activated the Crop Group, simply click the Crop name and make it Inactive.

To setup Products in the Site or Organisation catalogue

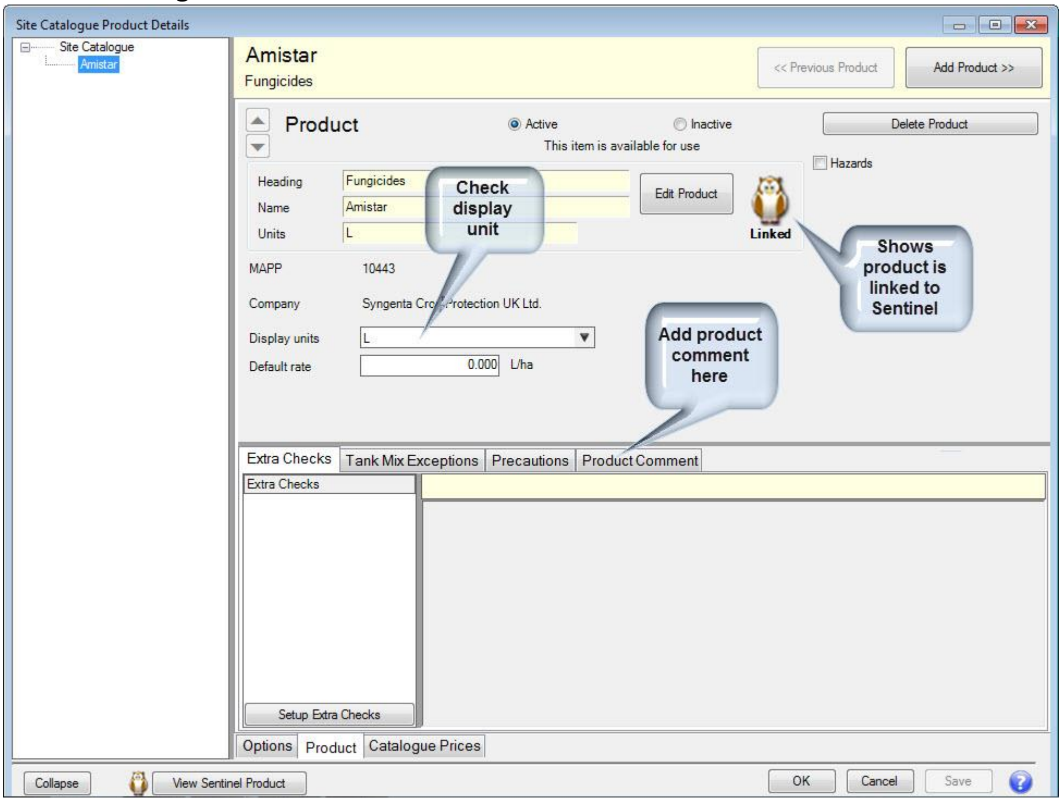
1. Choose the appropriate catalogue filter button ('Organisation' will be only be visible if you have the facility) in the main Catalogue Module window, and click **Add Product.**

2. In the 'Add new product to Catalogue' window, choose 'Sentinel Catalogue' (assuming that you are adding pesticide type products) from the 'Source' drop-down list and the tree view will populate with products held in Sentinel.

3. Select any number of products you wish to use across your businesses from this list. You can type into the empty white text box to search for specific products. A 'Unit Group' is assigned automatically to each selected product. Click **OK**.

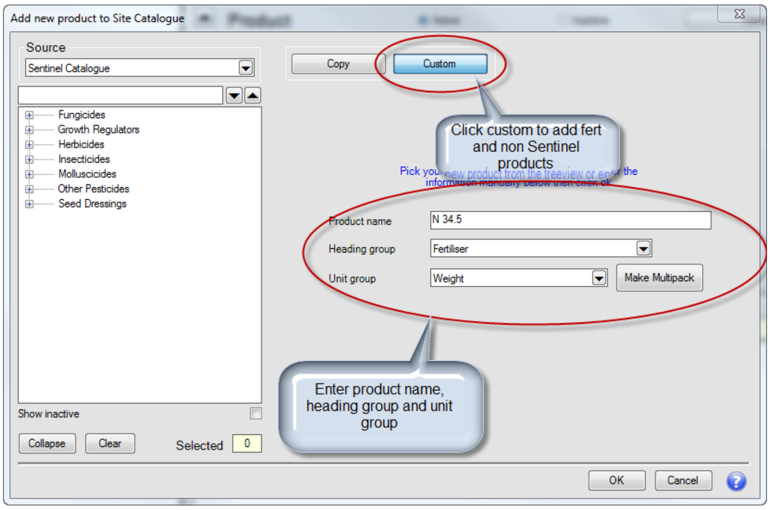

Add new product to Site Catalogue
Source
Sentinel Catalogue
amis
Type part of the product name to search
Copy
Custom
Click Custom to add non Sentinel products e.g fertiliser or any product in non Sentinel regions
Copy selected products and all relevant data to the destination list
Alto 240 EC (11236)
Alto Combi
Alto Eco
Alto Elite
Alto Extra
Alto Major
Alto Xtra
Alto Xtra (11839)
Alto Xtra (13058)
Amber
Amicron
Amigo
Amigo (08834)
Amistar
Amistar (08517)
Amistar Gem
Amistar Gem (08833)
Amistar Opti
Amistar Opti (11863)
Heading Group
Product
Unit Group
Fungicides
Amistar
L
Click to select the highlighted
Undo
Show inactive
Collapse
Clear
Selected
1
Number picked
1
OK
Cancel

4. In the ‘Site Catalogue Product Details’ window, choose a ‘display unit’ as appropriate and a default application rate for the product (per hectare). If you wish to add pack sizes and prices to products, use the ‘**Catalogue Prices**’ tab (right bottom) and setup prices by setting up a company the product will be sourced from if applicable (**Setup Companies** button) and using the Add Item button (see the Orders Module for more information on Companies, page 37).You can add comments and other details using the tabs available. **Note:** if you picked the product from the Sentinel catalogue you only need to check the display units are Ok and add a product comment if you wish. The remaining data will be accessed from Sentinel.

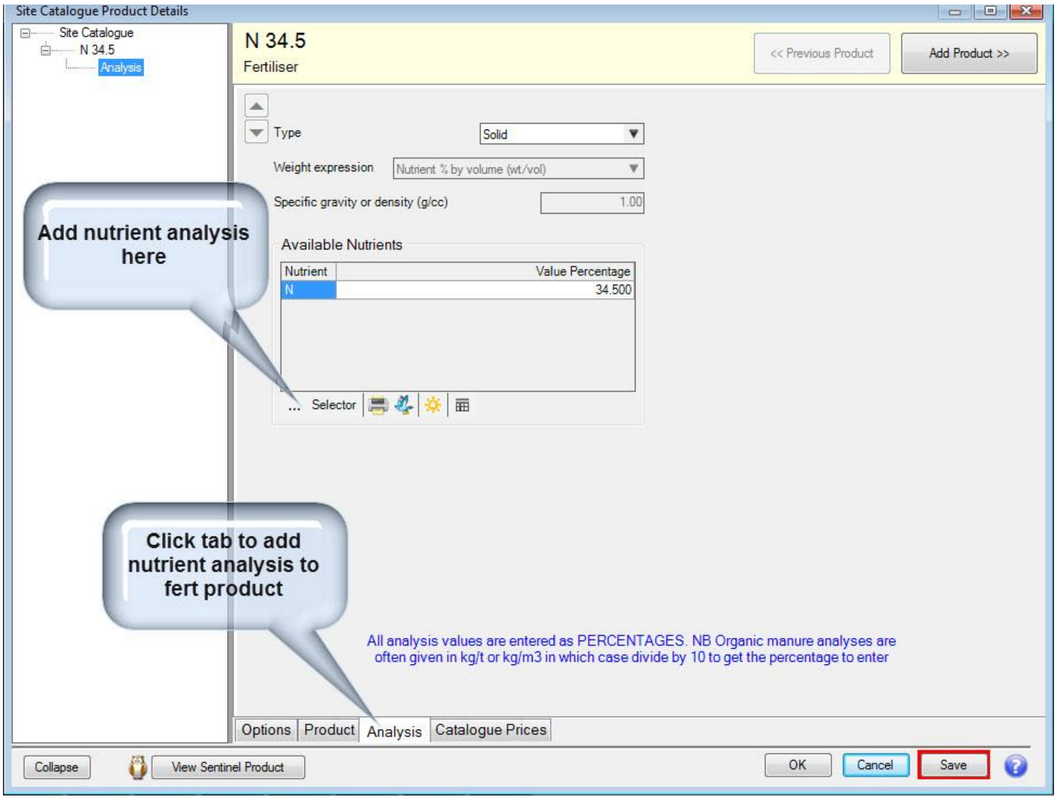


5. Click **Add Product** (top right) to add additional products to your Site catalogue. Click **OK** to return to the main Catalogue Module window.

N.B: If you wish to add non-pesticide products to your Site catalogue, such as adjuvants or fertilisers, click on **Custom** (see right) in the ‘Add new product to Site Catalogue’ window. You can then enter the product details manually. If you are entering a fertiliser, place it under the correct ‘Heading group’ and, in the ‘Site Catalogue Product Details’ window, use the ‘**Analysis**’ tab (see over) to



create a nutrient analysis (click ... Selector to select



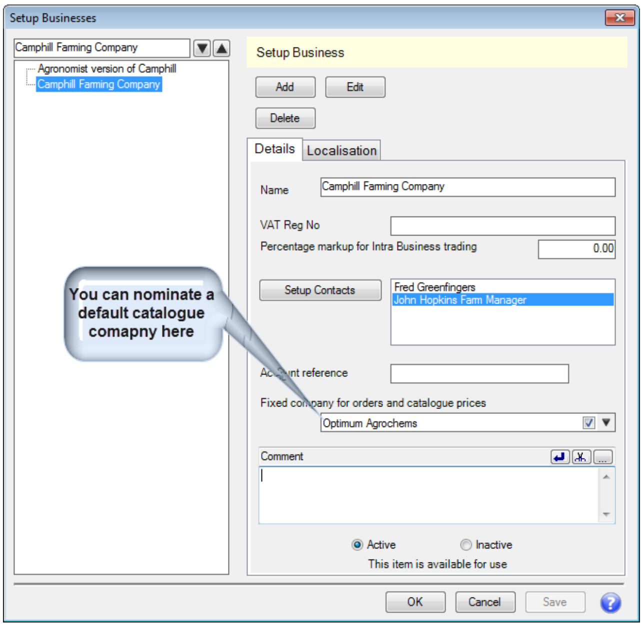
Once products are entered into the Site catalogue they are stored in the main tree view alphabetically under their Heading.

To edit any product details (including product prices), select the product from the tree view and click on the **Edit Product** option button at the top of the page. Alternatively, select the product heading in the tree view and click on **Edit Products** to edit several products. Edit product prices by clicking on the **Catalogue Prices** tab ► double click on the product price in the grid ► changing the unit/pack price ► **OK.**

Farmplan gatekeeper

Catalogue product prices and pricing logic in recommendations and Orders:

When you add a new client business, you can nominate a **Fixed company for orders and catalogue prices**. If you do so, it means that the nominated companies prices will be used in the recommendations and the nominated company will always be used by default to fulfil Orders for that particular client. You can nominate different companies for particular client businesses.



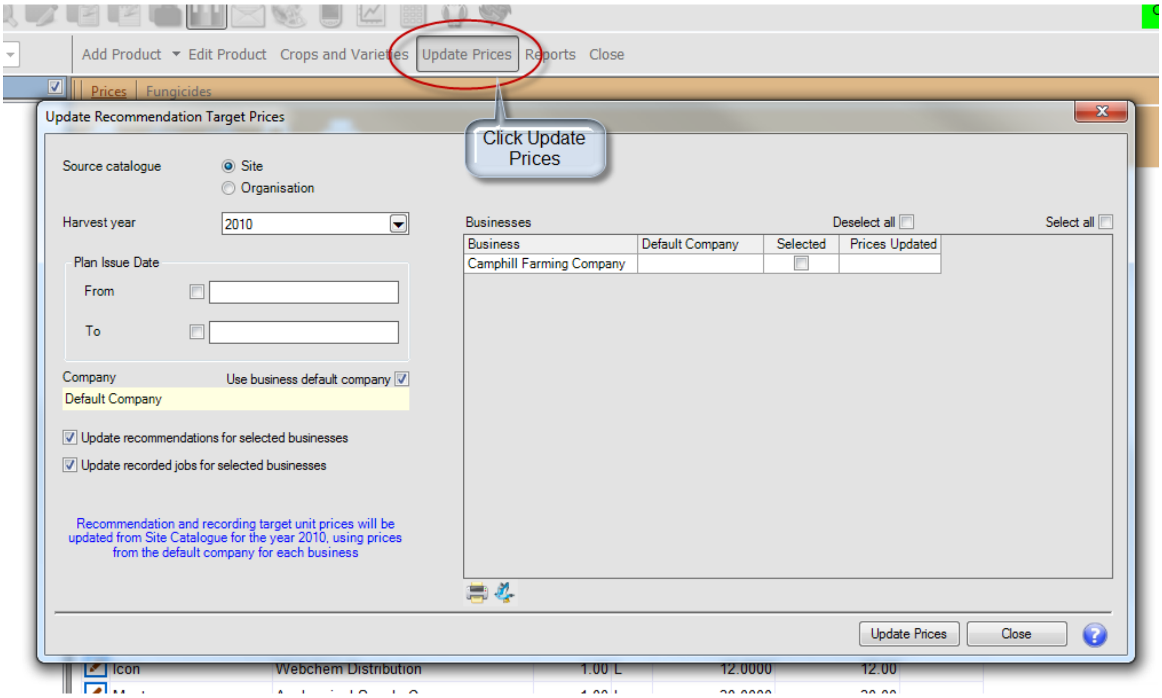
If you do not nominate a fixed company, then in the recommendation, Gatekeeper will use the lowest price that it can find in the nominated catalogue for that product regardless of supplier.

NB: You can amend the price in the recommendation to any price that you care to enter in that recommendation job, in which case the price entered "on the fly" in the Job will be held for that job only.

If you make a Plan based Order (see Orders page 50) the price in the order will be based on the options that you choose when building the order.

To update prices in existing recommendations with changed Catalogue prices

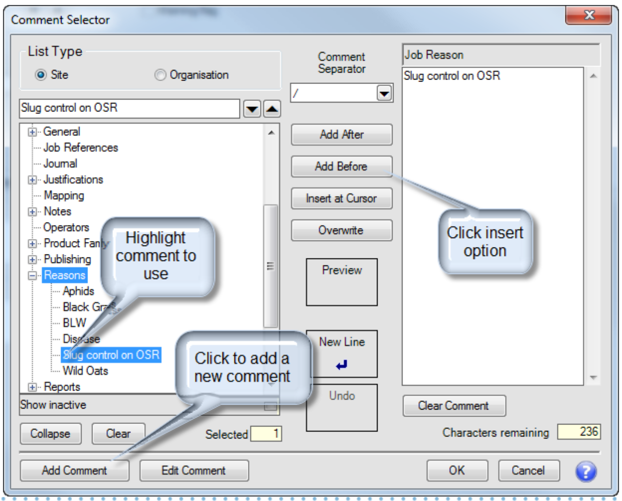
You can amend catalogue prices at any time and from that point on the new prices will be reflected in new Jobs and Orders. However, if you wish the new Catalogue prices to be reflected in recommendations already created, you will need to use the Update Prices function in Catalogues. First edit the catalogue prices for products that you wish to change. Then in the Catalogue Module main window use the 'Update Prices' option button in the main window ► select the Harvest year, Plan Issue Dates and the Businesses that are to be updated ► Update Prices ► OK. (See below)



To setup Recommendation Comments in a catalogue

When you are building Recommendations, Orders and setting up products, Gatekeeper often provides the facility to add comments. Although you can type any comment "on the fly", you may want to have a list of standard comments that you can re-use simply by picking them from the list. The advantage of having standard comments is that you only have to set them up once in the appropriate comments list from which you can pick them when you need them.

These text insertions or 'Comments' can either be setup within the 'Setup' Menu at the top of the main window, or (as we recommend) when you are working within a module and need to create a comment (e.g. when creating a recommendation) – this way it will be created  within context (in other words, you will see the context in which the comment is being used and find it easier to see what comments would be appropriate in that list). To create and select comments you need to open the 'Comment Selector' window that is accessed using the selector



button, which is found anywhere where a comment can be inserted.

1. To create a comment for a product within the Catalogue module, click on **Edit Product ► Product Comment tab ► Selector Button**
2. Highlight the heading under which you wish to add a comment (e.g. Justifications) and click **Add Comment.**
3. N.B: The default comment heading for the section you are in will be automatically opened and that is where you would normally add comments.
4. Within the 'Setup Comments' window, make sure you are in the Site catalogue and overtype 'New' with your comment. Click **Save**.
5. If you wish to add more comments, highlight a heading and click **Add**.

Any comments you have created will be part of the Site catalogue and will be available across all businesses, via the 'Comment Selector' window (see previous page). You can insert multiple comments (Click **Add After** to add first comment) from these lists into appropriate areas, using comment separators, which means that you don't have to setup individual, long-winded comments. If you are the Organisational catalogue manager, you will be able to create and edit comments from here too, or in the **Setup** (Top Menu).

Farmplan gatekeeper

Recommendations Module

This module allows you to create and issue recommendations. A recommendation represents a round of spraying, drilling, fertilising or other field based activity for which you want to advise your client on what to do, where and when. A recommendation consists of one or more Jobs and a Job consists of one or more fields which will be treated with the same product/s at the same rate/s. Thus the Job carries a list of the target fields, target products and rates, together with any comments and advice notes, warnings etc that are needed to ensure that your client carries out the work you intended.

If you have the optional SentinelActive module, your recommendation will be verified against UK crop approvals for pesticide type products and you will be alerted if Sentinel can spot any potential issues with your recommendation. Of course the final responsibility lies with you to ensure that your proposed application is appropriate.

Having created the recommendation, you can print it out and pass it to your client, or you can transfer the recommendation electronically.

Recommendations can be started from scratch or can be based on templates (see page 26), which are created within this module. A Template is a recommendation Job which once setup can be copied and used on any client. It makes sense to setup Template Jobs for applications which you will be using time and again so that you don't have to repeat the same thing for every customer. You can base a job on a template job and then "tweak" it for each client's particular circumstances.

Creating a New Recommendation from Scratch

In the Recommendations Module, make sure you are in the correct client Business and click **Add Plan** (first module option).

From within the 'Recommendations Setup' window, there are several options: First give the plan a name next to the Reference which is recognisable for both you and the client. The Plan will automatically be allocated the next available sequential plan number. The 'Contact' is the client and will be automatically populated assuming you have set up the contact (see pages 10 and 45) and elected that contact to be used by default for Recommendations. You can set your preferences for verification and LERAPs management which will be remembered for the next plan. Plan Comments and Conditions can be added by free typing or using the button (see page 21 for more details about setting up comments).

Click **Add Job >>** (top right). Choose the Job Type from the drop-down list and choose 'Adding a new job'. Click **Add Field Operations Job** (or whichever job type you chose. See Recommendation Job types on next page for further information). Remember that a 'job' is defined as a field, or a group of fields, which are going to be treated with the same product(s) at the same rate(s), although you can use the **Split Job** option if you wish to use different rates (see page 51).

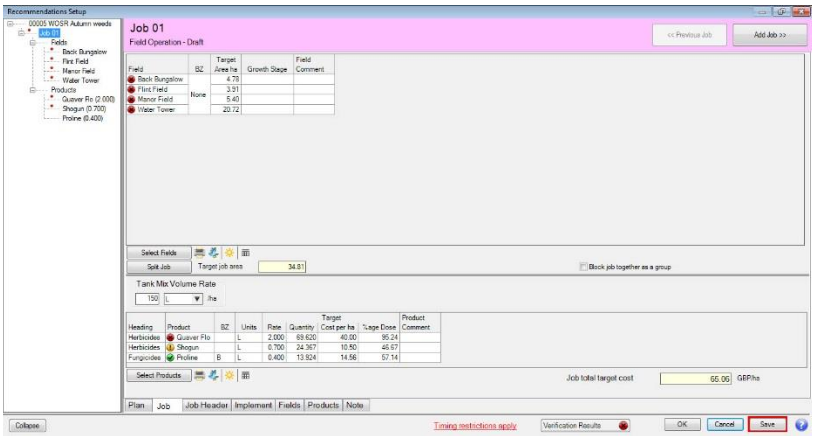
Recommendation Job types are:

- **Field Operations** – This is the Job type that you will use most often. You can include all recommendation details including implement settings.
- **Field Operations Products Only** – Similar to Field Operations Job type except you can't include implement settings.
- **Field Sampling** – Use to add soil sampling records to fields.
- **Field Nutrients** – Use to add a recommendation specifying the quantity of fertiliser NUTRIENT (as opposed to quantity of fertiliser product) to fields. A field Nutrients type Job can be converted into a product based job (see page 46)
- **Field Diary Notes** – Use to add notes type jobs i.e. no products to apply.

1. Choose the field(s) you are planning to work on in the 'Field Selector' window. Remember that you can filter the field list by crop, variety, field group, etc. Click **OK**.

2. In the 'Product Selector' window, choose from the Organisation or Site catalogue from the **Source** drop down list and select the products(s) you are planning to use and adjust the rate(s) as required. Remember that you can filter the product list by heading, heading type, etc. Click **OK**.
   Once you have selected the source catalogue Gatekeeper will offer you the same catalogue next time as you will nearly always use the same catalogue to pick products from. **Note:** The products will be priced in the recommendation at the lowest price available in the source catalogue across all catalogue supplier companies. However, if you have elected a **Fixed company for orders and catalogue prices** (see page 19) then the lowest price from that company will be used. You can change the price in the recommendation in which case that price will be held in that job for that product. If the same product is used in other jobs in the same recommendation, the price of the product when picked will be the default price and will need to be changed as necessary.

3. Within the 'Recommendations Setup' window (see below) you will see the results of the Sentinel verification (if you turned it on) next to the product(s) being used – a green tick indicates that verification has not identified any issues, an amber exclamation mark is a warning, but a red



cross is a failure. To find out the reasons for a warning or a failure, click **Verification Results** (middle bottom).

4. If you wish to treat some fields differently (e.g. different product rate(s), you can use the **Split Job** button (see page 51), which allows you to break an existing job into separate jobs. This provides a great deal of flexibility within the module.
5. Under the '**Job Header**' tab (bottom middle) within the same window (see above), you can add Job Reasons and Job Comments; within the '**Product**' tab you can add Reasons and Justifications for using the products and within the '**Note**' tab you can add Note Comments.
6. Also within the 'Recommendations Setup' window is the '**Implement**' tab (middle bottom), click on this to fill in information, such as tank mix volume rate and LERAP star rating. You can also add Application Comments. Note: these are the settings details for your client to use to configure their application equipment. There is no provision for you to add a machine with settings specific to each client.
7. Carry on adding as many jobs to the recommendation as you wish using **Add Job >>**. When you are happy with your recommendation, click **OK**. You will be taken back to the main Recommendations window and your plan will appear in the tree view under 'Draft'. If you have more than one recommendation in the tree view you can move between them by highlighting the recommendation you want to work with.

You can edit recommendations at any time; just select the appropriate plan in the main tree view and click **Edit Plan** (second module option).

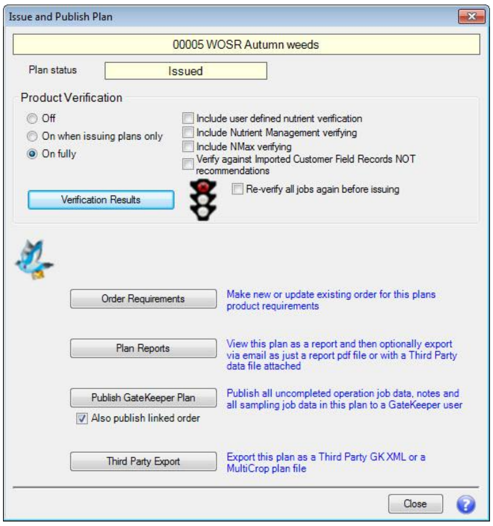
Issuing and Publishing a Recommendation

Before a recommendation can be printed out, transferred to a device or published to a client, it has to be issued. Once a Recommendation is issued it will be taken into account when verifying future Jobs. Only users with the necessary permissions can Issue recommendations. The permission to issue Recommendations is set on by default. Once Issued, the details of the recommendation will be shown against each field included in the recommendation, in the Fields module with a small icon against each line indicating an issued (as opposed to completed or customer imported status).

To issue a recommendation:

1. Highlight the plan in the main tree view and click **Issue Plan** (third module option).

2. Check the details in the ‘Issue and Publish Plan’ window are correct and click **Issue Plan**.



1. The plan status will then change from ‘Draft’ to ‘Issued’ and you have several options open to you depending on whether your client has MultiCrop or Gatekeeper .

a) If transferring recommendations to non-Gatekeeper users: **Plan Reports ► Recommendation Plan (Fields First) ► Run Report**. The report can then be printed out and posted, faxed or given by hand. It can also be emailed as a PDF, using the button in the report window. Select the contact in the ‘Add New Publication’ window (the contact’s email must already be set up – see step 3, page 10) and click **OK**. After synchronising, the email with a PDF attached will be sent via the Gatekeeper email server.

b) If transferring recommendations to MultiCrop or Third Party users: use the same method as in a), but tick the ‘Include MultiCrop format data file’ OR ‘Third Party GK XML data file’ box before clicking **OK** in the ‘Add New Publication’ window. After synchronising, the email, with a PDF and MultiCrop/XML import file attached, will be sent via the Gatekeeper email server.

c) If publishing recommendations to Gatekeeper users: follow the same method in a) to run the report and check the details, then close the report and the ‘Select Report’ window. In the ‘Issue and Publish Plan’ window, click **Publish Gatekeeper Plan** and choose your contact in the ‘Add New Publication’ window (you need to have already exchanged Publishing Keys – (see page 45). Click **OK** and the recommendation will remain in the Publishing Outbox until you synchronise, when it will be published to the Gatekeeper server until the client synchronises and the recommendation is transferred to their Publishing Inbox.

NB**:** If a product order has been generated from the recommendation, the 'Also publish linked order' option can be ticked to include the order as part of the publication.

Recommendation Reports

There are various recommendation report options and formats. In all cases, first create your recommendation and then Issue it. You can generate recommendation reports for Draft status recommendations in order to preview before issuing, but they will carry a watermark saying **Draft plan not authorised for use**.

To generate a recommendation report:

1. First create and issue your recommendation which should be highlighted in the main Recommendations module tree view.

2. Click the **Reports** module button.

3. Choose the appropriate report and set the options for that report. For product based recommendations, the report is likely to be either **Recommendation Plan (Fields First)** or **Recommendation Plan (Products First)**. The options that you select will be remembered for the next time that you visit this Reports section. The options available depend on the report selected in the side bar.

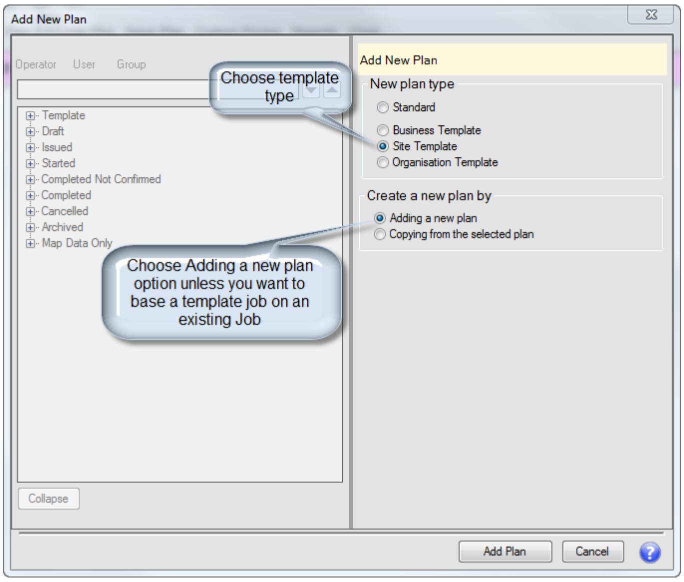
4. Recommendation reports can be printed and/or emailed as PDF attachments (See pages 32 and 45)

Templates and recommendations

It is more than likely that you will be prescribing the same types of recommendations across your clients' businesses, e.g. autumn weed control strategies. Template Plans (either Organisation or Site) allow you to create a number of jobs held under the same 'theme' to provide a quick way of issuing similar product recommendations without having to create them from scratch every time, e.g. under the template plan (or 'theme') of autumn weed control, you can have many jobs containing different cocktails of product applications (with suitable comments). When you use a template, you use a specific template JOB you do not copy the whole template plan.

To create a Template Plan:

1. Remember that each Template Plan is likely to be a collection of Jobs under the same theme, for example Autumn weed control, or Spring wheat fungicides, etc. The first thing to do is to create the Plan (theme) and then create individual jobs under that Plan. To create a new Template Plan; click the **dropdown arrow** to the right of Add Plan  to bring up the 'Add New Plan' window. Choose 'Site' Template if you want to use the templates on any client business on your Site. Choose Organisation (only available if you are the designated Organisation Catalogue manager) if you want the templates to be available to any agronomist site within your organisation. Under "Create a new plan by" select the "Adding a new plan" option and click **Add Plan**.



2. In the Plan Reference enter the name for the template Plan "theme" e.g. Wheat spring fungicides and then click **Add Job >>.**

3. Now you will create a number of Jobs, remembering that each job represents a cocktail of product/s including all the rate/s and comments that would be appropriate under this theme (in this example Wheat spring fungicides). You can add Jobs to this or any other Template Plan at any time by selecting the appropriate Template Plan from the tree view in the main Recommendations module window and clicking the "Edit Plan" module option button.

4. Jobs can be added to a template plan either by creating from scratch or by copying other jobs (either template or normal recommendation Jobs).

To add a template job from scratch:

I. First add the template plan or select the appropriate template plan and click **Edit Plan** and then click **Add Job >>**

II. In the Add New Job window Choose **New Job Type** of "Field Operations Products Only" and choose to **Create a new job by** "Adding a new job" and then click the **Add Field Operations Products Only Job** button.

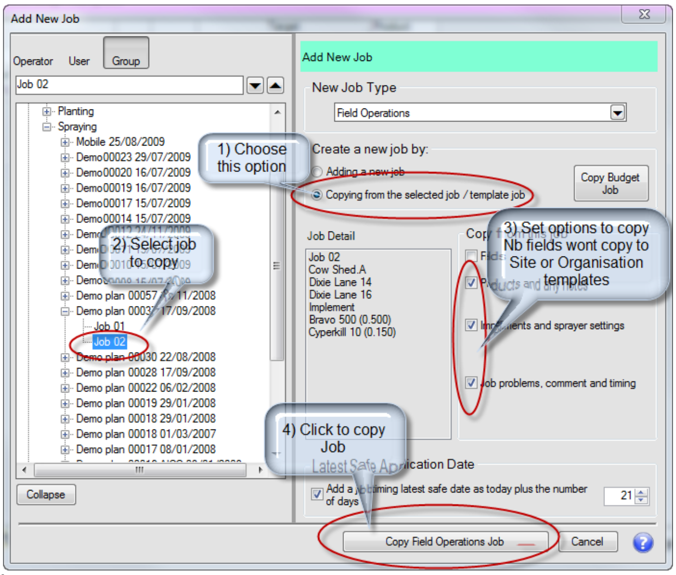
III. Set up the Job in the normal way EXCEPT you won’t add any fields at this stage. They will be added when you use the template job on a clients business. Most importantly you MUST name the job which is done from the **Job Header** tab at the bottom of the recommendations setup window. Click this tab and enter a suitable name in the **Optional Job Reference** slot. It is this name that you will use to identify this template job from other template jobs in the same template plan. As a suggestion use concatenated names of the products in the job, for example, Amistar/Hallmrk/5C.

IV. Remember to add any Job and product comments. It is worth taking some trouble over this as this detail will be included every time you use the template job and is a very effective way of passing useful information to your clients without having to type it every time. Don’t forget that you can edit any part of a recommendation job which is based on a template job.

V. Click **Add Job >>** to continue adding further jobs or **OK** to save and close.

To add a template job by copying a previous Job:

I. First add the template plan or select the appropriate template plan and click **Edit Plan** and then click **Add Job >>**



II. In the Add New Job window choose **New Job Type** of “Field Operations Products Only” and choose to **Create a new job by** “Copying from the selected job/template job”.

III. Now select the Job that you want to copy from the tree view. This can be either a template type job or a real recommendations type job and then click the **Add Field Operations Products Only Job** button.

IV. Edit the Job details as necessary and don’t forget to name the Job (see earlier section)

5. Once you have finished adding Jobs to the template plan, click **OK** and the recommendation will appear in the main tree view under the ‘Template’ heading. Remember that you can add new jobs to any existing Template by highlighting the appropriate template in the main module tree view and then clicking **Edit Plan**. It doesn’t matter which client business you have selected when editing Site or Organisation Templates as these templates are visible in all client businesses. However, if you want to copy a **recommendation job** from a particular client to a template Job, you will have to select that client so that those recommendations are available to copy.

Using a Template Recommendation

You use Template **Jobs** to copy to recommendation jobs. You would rarely, if ever, copy a whole template plan to a recommendation plan. Thus a recommendation plan can consist of jobs, some created from scratch with others copied from one or more template jobs from one or more template plans.

To use a template job in a recommendation:

1. Make sure you are in the correct client business and click **Add Plan**.

2. In the 'Recommendations Setup' window, name your plan and click **Add Job>>**.

3. Choose 'Copying from the selected job' in the 'Add New Job' window and the tree view will populate with template recommendations. Highlight the template job you wish to copy from and click **Copy Field Operations Job**.

4. Choose the fields you wish to include in the job in the 'Field Selector' window. Click **OK.**

5. The 'Recommendations Setup' window will now contain your copied job, complete with comments, etc. You can edit any product details/comments as required and add further jobs to the plan. When you are happy, clicking **OK** will take you back to the main window and the recommendation will be under 'Draft' in the tree view.

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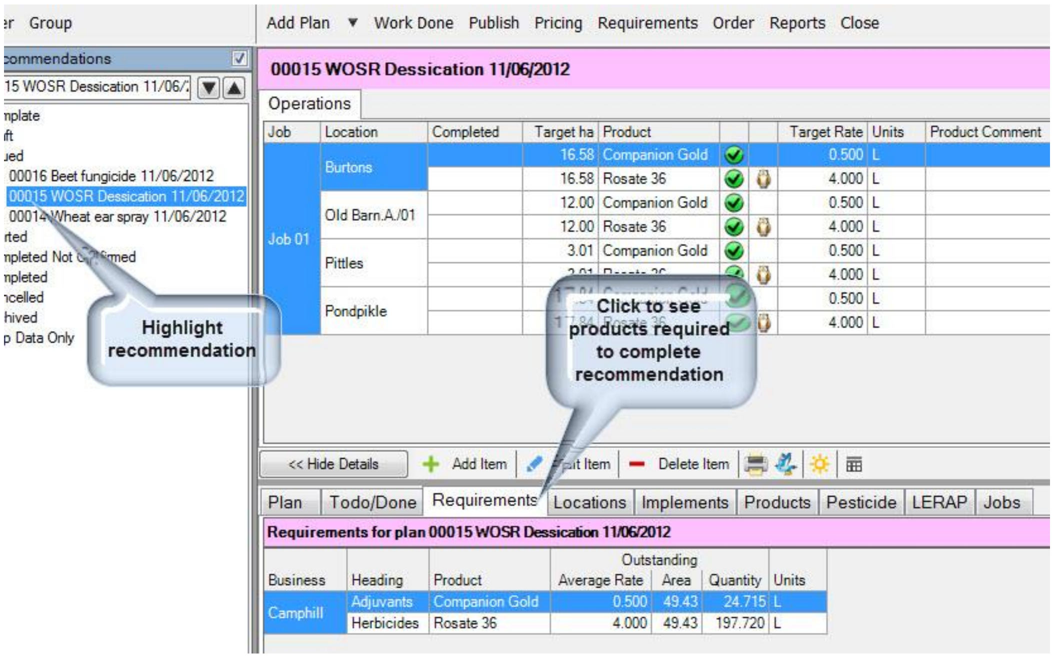
Recommendation Plan Products Required

You can easily and quickly see the total product required to complete a recommendation Plan without having to create a product order. This is handy if you want to get a “quick and dirty” view on products required. You can see how much product is required across a recommendation (containing multiple jobs) by highlighting the plan in the tree view ► **Show Details >>** (bottom of main window) ►



‘**Requirements**’ tab. If you need to create an order see Orders (page 37).

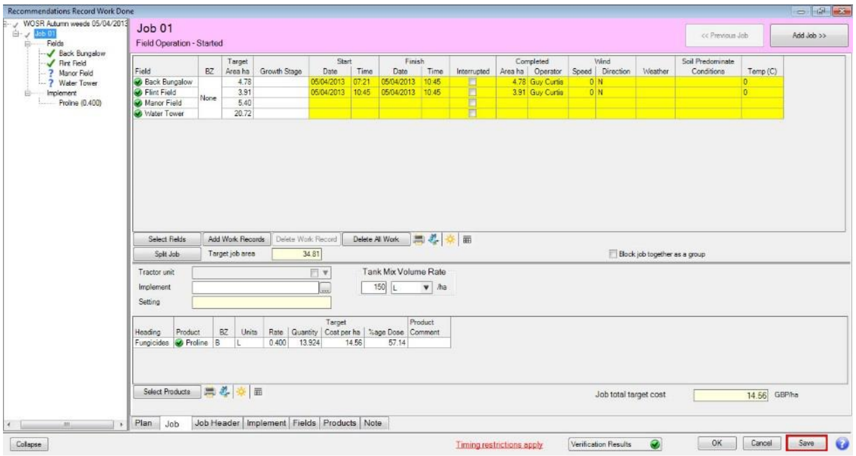
Recording Work Done

Once you have issued a recommendation, the **Work Done** button appears (the second module option) in the main Recommendations Module window. You can use the Work Done function to add the application dates etc. to completed recommendations. It is not essential to do this, although it is a useful exercise and will allow completed nutrient recommendations to be taken into account when using the Nutrient Management Module.

In the situation where a client records their own work done (in either MultiCrop or Gatekeeper) and you import their field records (see pages 13 and 15) you will be able to see what was actually carried out, and when. However, the original recommendation will <u>not</u> have its status of 'Issued' updated automatically to 'Completed' and thus will remain a record of what you issued to the customer as opposed to what they perhaps did.

To record work completed:

1. Select the recommendation you wish to work with in the tree view and click **Work Done** (making sure you are in the correct business).
2. In the 'Recommendations Record Work Done' window you need to fill in the yellow cells based on the work done, rather than what was planned, e.g. there may have been delays to completing the job so the work was not done on the planned day (see next page).
3. NB: If you want to record more detailed observations such as time started and finished for the completed work, you need to go to **Tools** in the Top Menus ► **Options** ► **Field Jobs** (in the tree view) ► tick 'Record work done observations for recommendation jobs' (optionally the tractor and implement can also be recorded with these setting, tick if required) ► **OK** ► back into **Work Done** ► '**Job Header**' tab (middle bottom) ► '**Observations Format**' tab (mid screen) ► tick boxes as required ► return to the '**Job**' tab.
4. If the job was not fully completed you can fill in some details and come back to it at a later date. Outstanding work in the recommendation is indicated in the tree view by blue question marks (see right) and, if the recommendation is closed, it will be listed under 'Started' in the main tree view.



5. Within the window, you can add a field to an existing job by using the **Select Fields** button. You can remove a field in the same way. You can also add and change products by using the "Select Products" button to access the product selector.

6. If you wish to break up an existing job into separate jobs (involving one or more fields), use the **Split Job** button (see page 51).

7. Once all the work is recorded in a recommendation, and saved, it is listed as 'Completed' in the main tree view.

Cancelling Recommendations, Jobs and Fields

If whole or part recommendations are not carried out you can keep them but change their status to clearly indicate what has and has not been done. In this way you retain the record of what was advised to the client without compromising your field recommendation history for the purposes of verification or nutrient planning.

To cancel a whole recommendation plan: In the recommendations window, select the Issued plan to be cancelled and click **Work Done**. Click the Plan tab and click **Cancel Plan.**

To cancel a field: Open the plan as above, click the Fields tab, select the field to cancel and click **Cancel Field**.

To cancel a Job: Open the plan as above, click the Job header tab, select the job to cancel and click **Cancel Job**.

Creating a Nutrient Type Recommendation

As mentioned earlier in this chapter, recommendation plan jobs can be of various types. One such type is called a Field Nutrients type job and allows you to create a recommendation plan based on quantity of fertiliser nutrient as opposed to quantity of fertiliser product. Field Nutrient plans can be converted into product based plans eventually.

The logical work flow for nutrient planning is to use the Nutrient Management module (UK only) first to help calculate the optimum quantity of nutrient required for each field and then build a Field Nutrients type recommendation plan and then finally convert this to a normal Field Operations type recommendation plan.

Run Nutrient Management to calculate optimum requirement.

Create Field Nutrients type job

Convert Field Nutrients job type recommendation to Field Operations Job type recommendation. Issue and

To create a Field Nutrient job based plan:

1. Add a new plan in the normal way and then click **Add Job** (Nutrient Jobs can also be built directly from the nutrient recommendation, see page 46 for more information).

2. Under New Job Type choose **Field Nutrients** and click **Add Field Nutrients Job**.

3. Select fields into the Job from the tree view and click **OK**.

4. Now from the **Sampling Heading Selector** select the **nutrients** that you want to include, e.g. N and click **OK**.

5. In the Recommendations Setup window enter the target rate against the Nutrient which is the total amount of Nutrient that you wish to apply. Also enter any comments etc that you may want if you intend to send this Nutrient recommendation to a client. However, if you are going to convert it in to a product based recommendation first then don't bother to add comments yet.

6. Either issue and report/publish OR go to next section to convert to a product based recommendation.

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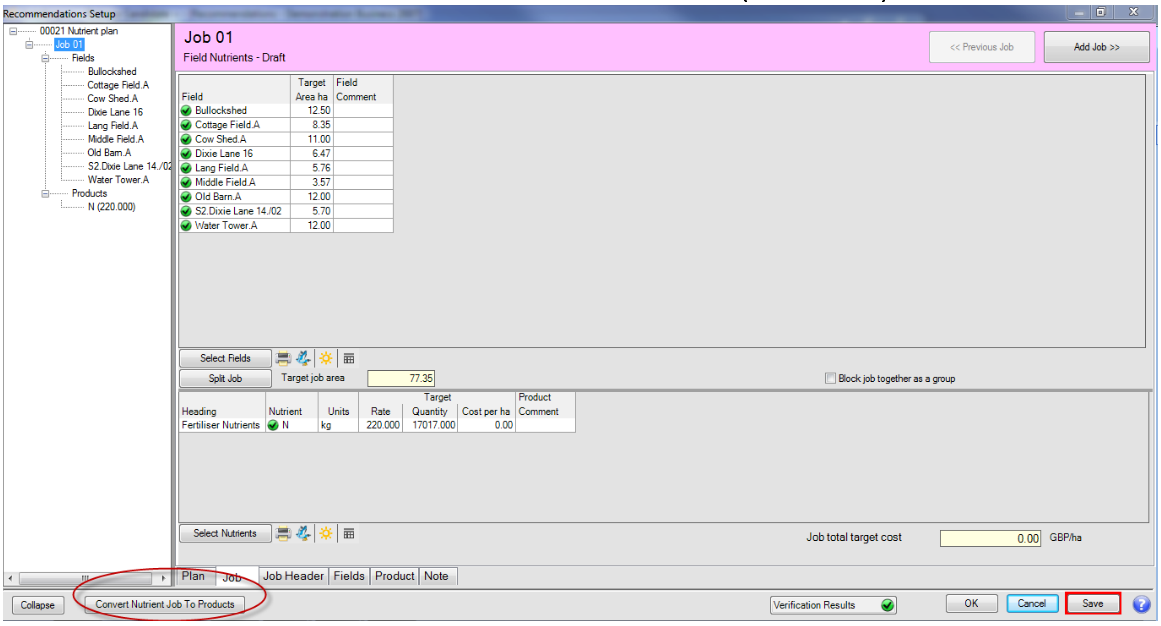
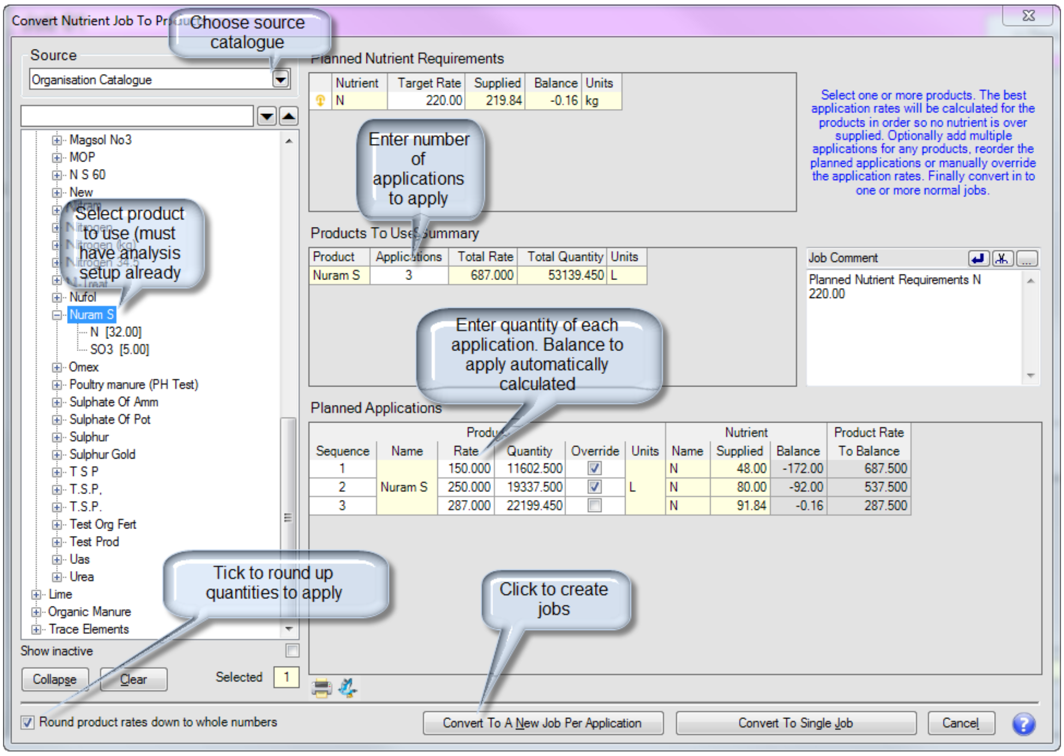
To convert a Nutrient recommendation to a product based recommendation:

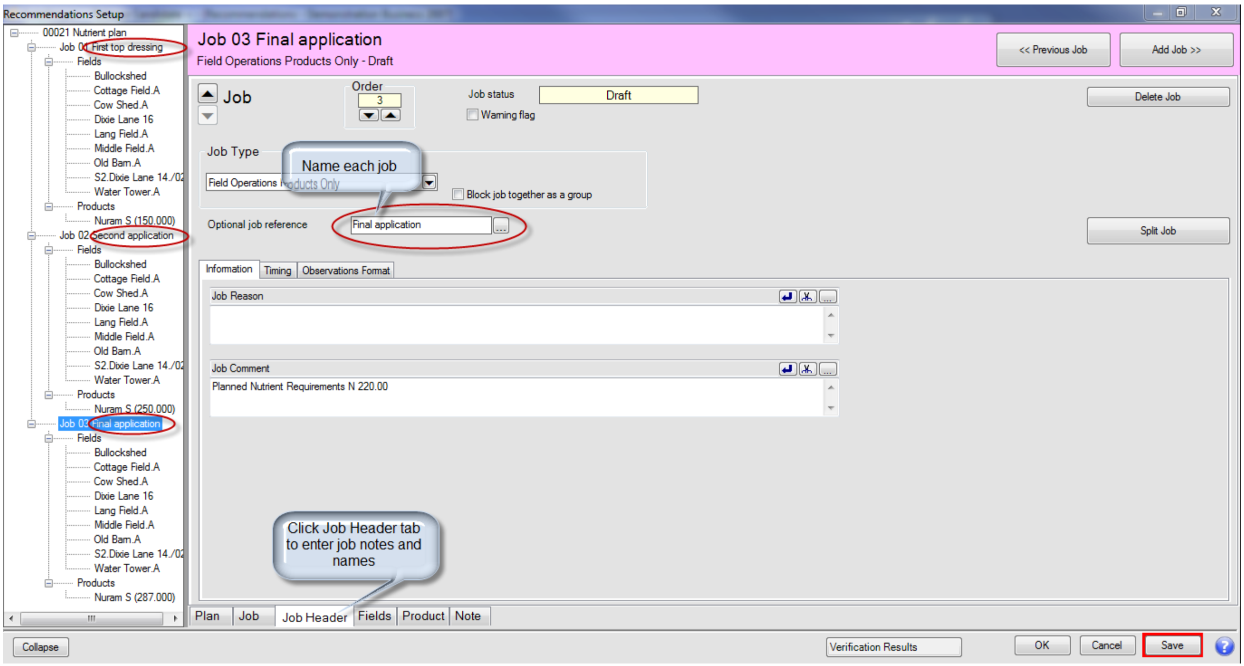
1. First make the Nutrient based recommendation (see above). Have the recommendation open on the Nutrient job to convert.
2. Click the **Convert Nutrient Job To Products** button (see below)



3. Set the options in the **Convert Nutrient Job To Products** window (see over)



4. Having converted the Nutrient Job/s to Products Job/s make sure that you name each job and add any notes required (see below)



5. You now have a nutrient recommendation with a draft status. In our example we created a recommendation containing a three dose N application programme. You could issue and send the recommendation to your client “as is” or you could decide to keep this recommendation as a draft version and then create a new Recommendation plan containing the first application Job/s only, copying them from the draft programme/s. That way you remain in control of the fertiliser programme at each stage.

Recommendation product pricing

Products will be priced in the recommendations at the price stored at the point of creating the recommendation. This will either be the catalogue price or the user defined price entered when making the recommendation. If no prices are setup in the Catalogue and no price was entered at the point of making the recommendation, then the price will be zero.

Recommendation prices can be changed in one of 3 ways:

- Edit individual recommendations – only suitable if one or two recommendations need changing.

- Edit the catalogue prices and then use the **Update Prices** function in Catalogues (see page 19-20). – useful if you want to change prices sourced from catalogues across one or more client businesses, but not if you want to change the recommendation prices for all or a range of recommendations in a single client business.

- Use the **Pricing** function in the Recommendations Module – useful if you want to change the prices for several recommendations over a defined date range for a specific customer or if you want to price up recommendations at a later date. See the following notes on how to use **Pricing**.

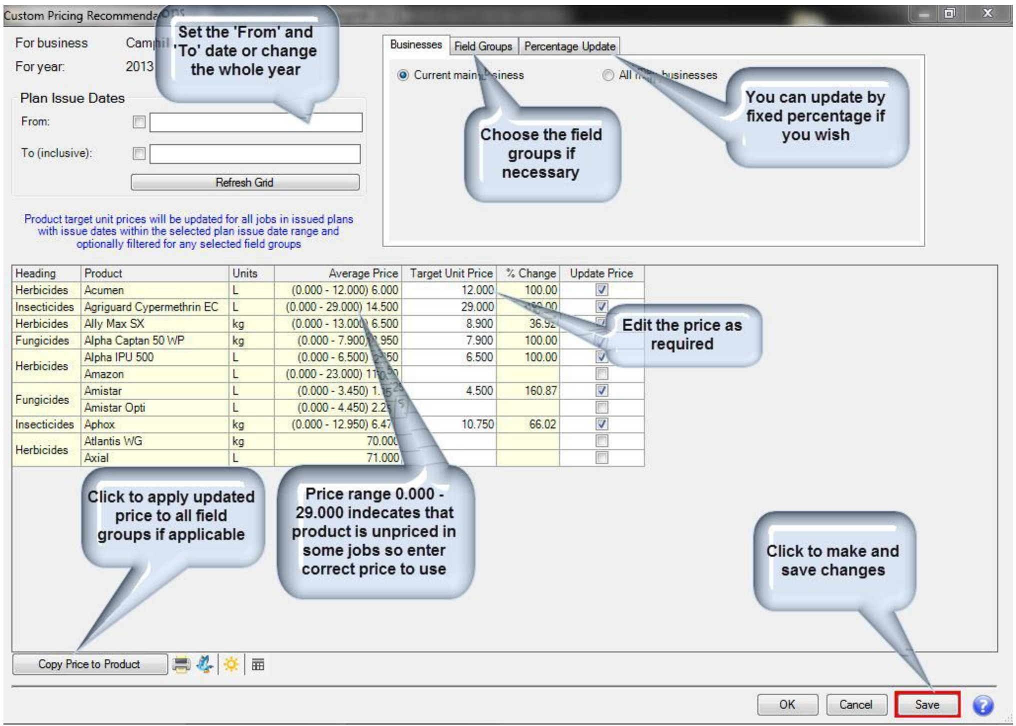
Changing prices using Pricing

Pricing allows you to change product prices in recommendations for a specific client within a specified date range. To change recommendation prices using this method:

1. Select the client using the Business and Year selector and go to the Recommendations Module.

2. Click the module option button labelled **Pricing**.

3. Set the options and amend the prices as required (see below). Click **Save** to make the changes.



Publishing Module

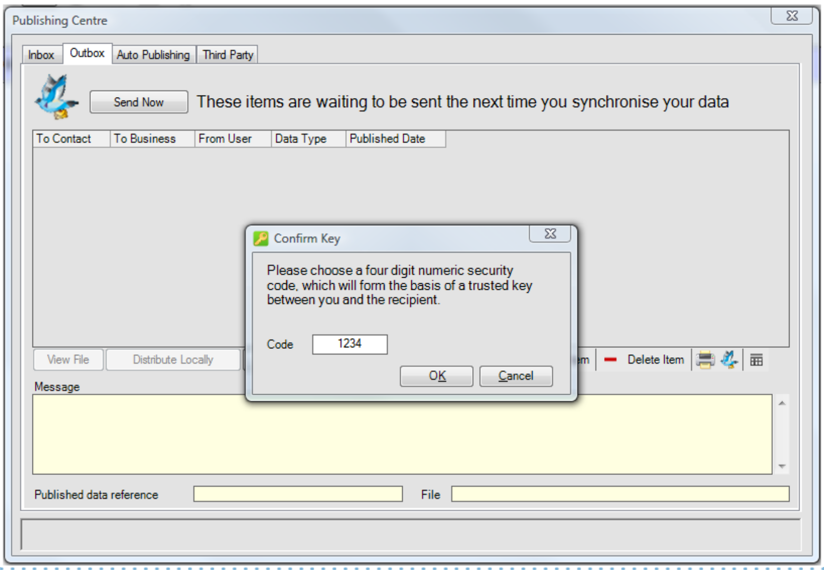
This module allows you to send and receive data from other Gatekeeper users electronically (see steps 6-7, page 13) for instructions on importing field records from MultiCrop users and other 3rd parties), either during the synchronisation process or locally, via a memory stick. You will receive cropping and field records from your clients into your Inbox, and you will send recommendations (see previous chapter) or cropping records to your clients, which will sit in your Outbox until synchronisation. You may also want to send data or reports to different locations and businesses.

NB: If you want to send out publications quickly, without having to synchronise, you can use the **Send Now** button (next to the carrier pigeon icon) in your Outbox.

However, you will only be able to send data to, and receive data from, other Gatekeeper users with whom you have swapped Publishing Keys. This essential part of Gatekeeper security ensures that published data will only end up at its intended destination. The following instructions will take you through the process of creating a Key, and swapping this Key with your chosen party (known as a Business Contact), either via email or a USB memory stick. You only need to go through this process once with each party.

Creating and Sending a Key

1. If the recipient of your Key is not already set up as a 'Business Contact' you need to click on the **Business/Year Selector** (coloured box in the top right of the main Gatekeeper screen) ▶ **Setup Business Contacts** ▶ **Add**. Fill in their name (and address if you wish), but the most important information to enter is a valid email address for them within the '**Details**' tab. Click **OK**.



2. Go to the Publishing module and click into the **Outbox** tab.

If you wish to send the Key via email:

1. Click **Send Key** and you will be prompted for a four-digit code (as shown above), which is the 'unlock' code for the Key and is needed by the recipient of your Key, so please make a note of it. Click **OK.**

2. In the 'Add New Publication' window, choose your recipient using the picker box to the right and add a message if you wish – it can be the four-digit unlock code. If you would like to keep a copy of your sent items, use the 'Send a copy to 'me'' tick box. This will forward you a copy of the publication to your email account. Click **OK** and the Key will be placed in your Outbox and sent the next time you synchronise.

If you wish to transfer the key via memory stick:

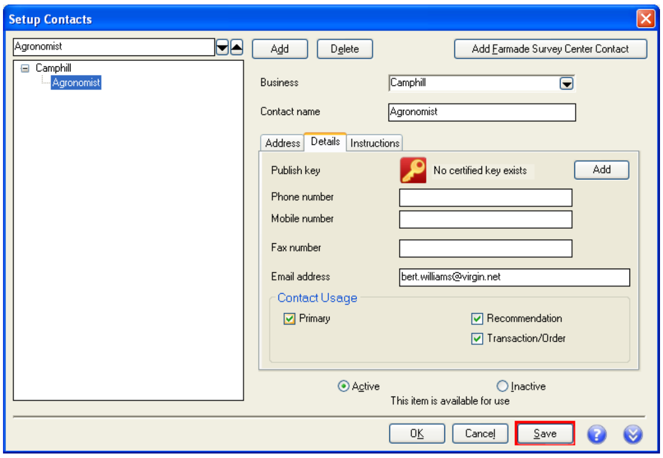
1. Click **Save Key** and within the 'Save Gatekeeper key file' window, browse for the location of your memory stick, then click **Save**. You will be prompted for a four-digit code, which is the 'unlock' code for the Key and is needed by the recipient of your Key, so please make a note of it. Click **OK**. Your Key is now on the memory stick.

Receiving a Contact's Key

Depending on which method you chose, the Key will arrive either as an email attachment, or as a file on a memory stick. Follow the instructions below for the appropriate method, BUT if the Key came via email, you must save the attachment to a known location first (e.g. create a 'Gatekeeper' folder within 'My Documents' and save it to there).

1. Click on the Business/Year Selector ► Setup Business Contacts.

2. Assuming that your Contact is already set up, select the appropriate Contact in the 'Setup Contacts' window tree view and click on the 'Details' tab (see right).



3. Next to the red Key icon, click Add and browse within the 'Add Gatekeeper Publishing Certificate' window to find the Key file (ending in .gkk). Click Open.

4. Enter the 4-digit code you received from your Contact when prompted, and then click OK.

5. You will now notice that the Key icon has turned green, meaning that you can now publish to that Contact.

6. Click Save or OK to save and close.

Sending Field Cropping / Field Records

Once you have set up your Contacts, if you want to send field records, as well as field cropping, to anyone, you will need to:

1. Click **Tools** (in the Top Menus) ▶ **Options** ▶ **General** (under the 'Business' heading in the tree view) ▶ Tick the box 'Allow Gatekeeper export of operations, notes and sampling; as well as just
2. cropping' ▶ **OK**. This step only needs to be done once.

3. Go to the Publishing module and click on the '**Outbox**' tab.

4. Click **Publish Field Records**

5. In the **'Add New Publication'** window, chose the Business Contact you are exporting to, your Harvest year and which Field Groups you wish to export. If you want to send 'Cropping operations notes and sampling' as well, select the option. Click **OK**.

6. The data will remain in the Outbox until you synchronise, when it will be published to the Gatekeeper server until the recipient synchronises at which point it will be transferred to their Inbox.

Importing Incoming Data:

After synchronising, if you have received any publications (for example Cropping from one or more of your clients), you will see a 'New Messages' balloon pop up in the bottom right of your screen. You can "preview" the contents by clicking the "**view file**" button.

To import the data:

1. Go into the Publishing module and click on the '**Inbox**' tab.

2. Highlight the data you wish to import and click "**Import Published Data**".

3. In the 'Field Data Import Options' window, select the relevant options and click "**Import Data**". At the warning message, click Yes. NB. You can delete any publication(s) from your Inbox or Outbox by highlighting it and clicking **Delete Item**.

Transferring data to and from a non-Gatekeeper user:

You can use the Publishing module to transfer data to and from a non-Gatekeeper user. For example your client might be using a Gatekeeper compatible software package. In these circumstances, you might want to transfer any of the following types of data:

Cropping set-up details – when you and your client transfer data it is essential that your fields and cropping are set-up identically. You can ensure this by exporting your cropping set-up from Gatekeeper to the other package. In that way you should get recommendations coming back that will merge with your data successfully.

Data is transferred to and from third parties using the Third Party tab in the Publishing module. There are two options for Third Party Data Exchange which are:

Import Field data – use to import cropping from your client (it is better if the grower exports their cropping to the agronomist usually)

Export Field Data – use to export cropping and/or operations to a third party.

Orders Module

Having created a recommendation for a client, you may also want to create an order for the products required, which can be emailed directly to the product suppliers or printed out and faxed. The order consists of an itemised report including products, quantities, and also optional product information such as prices, active ingredients, pack sizes etc. The order includes the purchaser and supplier contact details together with delivery point comments if they exist.

Orders can either be built from scratch, or based on an issued recommendation (a Plan-based Order). The Plan Based Order method is the quickest way to build an order assuming that it is to be based on one or more recommendations that have already been created and issued.

Creating a Plan-based Order

Creating an Plan-based Order direct for an issued plan:

A plan-based order can be created at the point of issuing a recommendation. After clicking the **Issue Plan** button (see page 24 for more information on creating and issuing recommendations), click the **Order Requirements** button (see image) and follow on from step 4 in Creating an Plan-based Order from Scratch section below .

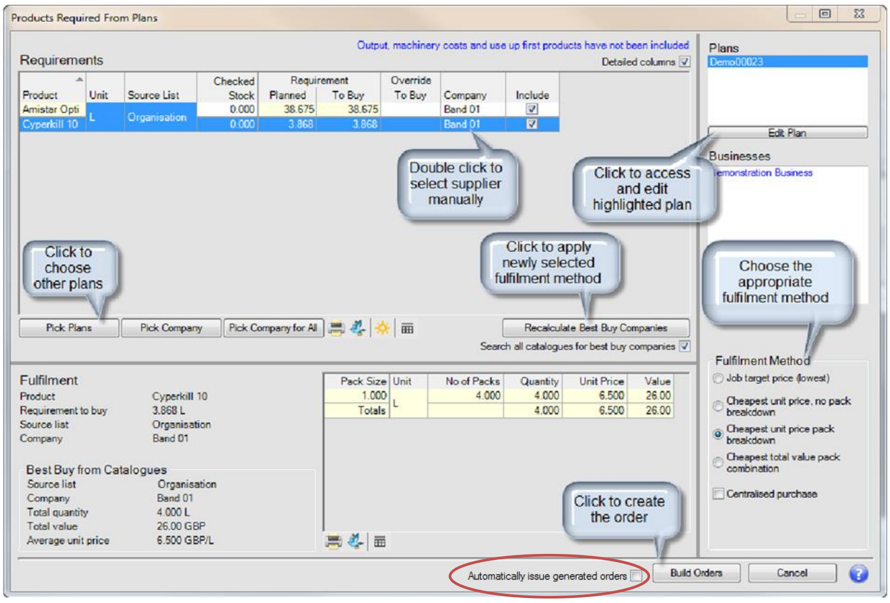
Creating an Plan-based Order from Scratch:

1. In the Orders main module window, click **Add Order** (the first module option).

2. In the 'Add New Transaction' window, enter a 'Reference' as appropriate and select the 'Plan based order' radial button. You can choose to turn the pack option On if you want Gatekeeper to calculate requirements based on optimised packs (this assumes you have setup pack sizes). Click **OK**.

3. In the 'Plan Selector' window, select the recommendation(s) you wish to use to base the order on

4. NB: You can filter the Recommendations included in the list by using the **Today, This Week** and **All** filter options. Click **OK** to continue.



5. Gatekeeper will create a grid of product requirements based on the recommendation(s) selected (see previous page). The Recommendation amount can be overwritten using the ‘Override To Buy’ column). If the ‘Detailed columns’ box is ticked (see previous page), a ‘Checked stock’ column will appear in the grid. Enter the on-farm quantity of product the client already has and this amount will be automatically deducted from the ‘To Buy’ column.

6. Also within this window you decide which supplier, or ‘Company’, you wish to buy the products from. You may want to select the supplier companies manually in which case choose the supplier for each product by double-clicking in the ‘Company’ column. To choose the same company to supply all products, click **Pick Company for All**.

Alternatively you can choose the appropriate **Fulfilment Method** and then click the **Recalculate Best Buy Companies** button which will use the selected fulfilment method to populate the supplier grid.

Fulfilment Methods:

- **Job target price (lowest)** – Uses the price of the product in the Jobs in the source Plan/s. Use this if you have priced products “on the fly” when creating jobs and want to use those rather than Catalogue prices. Note: if a product appears in more than one job in the source Plan/s at a different price, then the lowest price will be used.

- **Cheapest unit price, no pack breakdown** – Uses the cheapest unit price regardless of pack size and does not show any pack price breakdown.
- **Cheapest unit price, pack breakdown** – Uses the cheapest unit price regardless of pack size, but does show the pack breakdown.
- **Cheapest total value pack combination** - Calculates the best combination of packs giving the cheapest total value for each product in the Requirements grid

NB: You can setup Companies by clicking Pick Company ► Setup Company ► Add. Remember: if you wish to email them you need to set up the supplier as a Contact as well (see step 3, page 10.). If you wish to set one company as your default supplier, click in the Business/Year selector ► Edit **Business Details** ► tick the box within the 'Fixed company for orders and catalogue prices' area and choose the company.

7. Click **Build Orders** and your chosen products will be listed in the 'Orders Setup' window. You can adjust any details as required, including adding more products using the **Select Products** button (for example to add tank cleaner etc)

8. If visible, click the **Issue Order** button (ringed in yellow) and your order status will turn from a 'Draft Order' to an 'Issued Order'. Click **OK**.

   NB. If the issue Order button is not visible, the 'Automatically issue generated orders' option was ticked (circled red at the bottom of image on previous page). Click **OK** and move on to step 8.

9. To print out, email or export the order, highlight it in the main tree view and click **Reports** (fourth module option). Select **Order** in the 'Select Report' window and then choose to include prices and/or active ingredients in the order, if required. Click **Run Report**. Within the preview report window, you can email (using the  button), print out or save the order.

Creating an Order from Scratch

1. Click **Add Order** (the first module option).

2. In the 'Add New Transaction' window, enter a 'Reference' as appropriate and select the 'Order' radial button. You can choose to turn the pack option on if required. Click **OK**.

3. In the 'Select Supplier' window, choose the 'Company' you wish to buy the products from. You can setup Companies by clicking **Setup Company** ► **Add**. Remember: if you wish to email them you need to set up the supplier as a Contact as well (see step 3, page 10.).

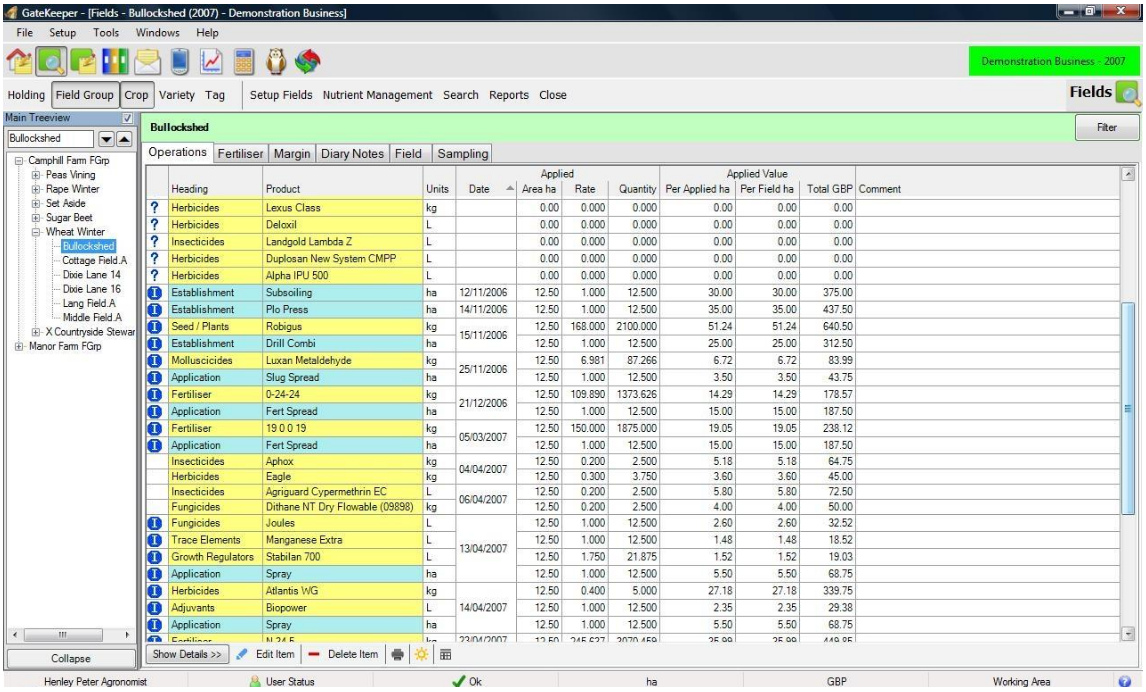
4. You build your order by selecting products within the ‘Product Selector’ window and filling in the quantity column in the grid. Click **OK.**

5. Edit the order as required in the ‘Orders Setup’ window, then click **Issue Order** (ringed in yellow) which turns the ‘Draft Order’ into an ‘Issued Order’. Click **OK**.

6. To print out, email or export the order, see step 8 above.

Fields Module

This module is for browsing your field records with options for searching and filtering the data:



- use the Filter Buttons above the tree view,
- type in the beginning of a field name in the search facility above the tree view,
- use the Grid Tabs to change details in the Main Grid,
- sort the data in the Main Grid according to column heading (the illustration shows the data sorted by date – indicated by the grey arrow at the top of the 'Date' column),
- click **Filter** (top right) to adjust what is contained in the Main Grid – this allows you to filter field records to show your recommendations and/or a client's imported field records (indicated by); and also the status of the records (e.g. ? indicates an issued recommendation, neither started nor completed),
- click **Show Details** to view more details about the highlighted field record.

If you need to edit any details in the Main Grid, such as recording a different quantity of product applied, just click on the operation and double click on the cell containing the data to be edited. This will take you to the original Job Record, which can be edited (e.g. allowing you to change all fields or individual fields if in complex proportion mode, within the job, if required).

Setting up Fields and Cropping

Use this to setup and manage annual cropping records. The **Setup Fields** button (first Module Option) will take you to the 'Setup Fields' window. NB: Once you have existing fields within Gatekeeper, clicking **Setup Fields** will take you to the 'Cropping Summary' window. If you need to edit any field details, such as splitting a field or adding Buffer Zone information, double click in the year column within the field you require and you will be taken to the original field data.

1. Overtype 'New Field' with the name of your field and fill in your field details.
2. Click **Cropping Record**.
3. NB. If you want to split a field, click **Divide Field** (bottom middle of the 'Setup Fields' window) ► **Add Item** ► Fill in the 'Working Area' of the first part of the field ► **Add Item** and repeat the process until you have the right number of splits to your field ► **OK**.
4. You should allocate a crop to the field (middle section of 'Setup Fields' window). If you haven't got any crops or varieties already set up, or you have new crops for the season, click **Setup Crops and Varieties** and work through the setup process. Having completed this, return to the 'Crop' drop-down list and choose the cropping for your field.

Managing Cropping Year

When you want to set up a new Cropping Season or convert a future Cropping Season (purple Plan Year) into the current Cropping Season (green Current Year):

1. Click the coloured box (probably green) with your business name in it (top right corner of main Gatekeeper window), which takes you to the 'Main Business and Year Selector' window.
2. Click **Manage Cropping Year**.
3. Click **Advance** (which will convert your Plan Year into your Current Year and your old Current Year into a yellow Previous Year). Click **Yes** at the warning.

You can allocate cropping to the new Cropping Season using the following instructions.

Starting a New Cropping Season

In Gatekeeper, you can allocate cropping to a new season at any time, even for Plan (purple) Years, from the 'Cropping Summary' window. This process allows you to copy all or part cropping from a previous season to the new season. This does not necessarily have to be the immediately preceding crop year. If you have the Farm Mapping module enabled, you will also be managing the field region boundaries (see separate Farm Mapping Quick Start guide).

1. Click **Setup Fields** button (First module option).
2. Within the 'Cropping Summary' window, click anywhere in the column for the year in which you want to allocate cropping and the **Setup Fields for 20??** button (bottom centre) will change colour to reflect the year you have chosen. Click this button OR double click the cell in the new year column adjacent to the field for which you want to set up the cropping.

3. The 'Add Field to Cropping Year 20??' window will appear (see over). Choose from one of the following four options -

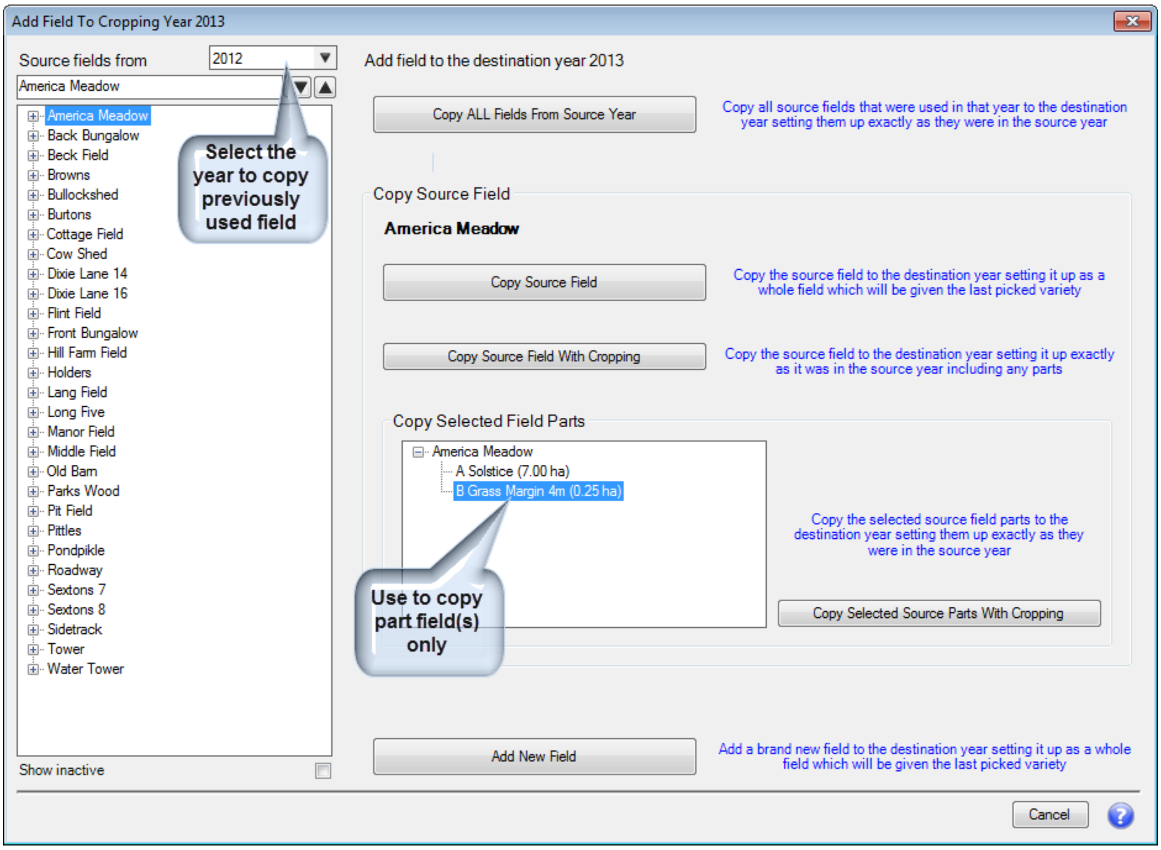
   a) To <u>copy all fields exactly</u> as they are in a previous year:
      I. Use the 'Source field from' dropdown box at the top of the window (above the tree view) to select the cropping year you wish to copy all fields from.
      II. Click the **Copy ALL Unused Fields From Source Year** button.

   b) If you want to <u>copy the main field only (without splits)</u> and allocate new cropping:
      I. Use the 'Source field from' dropdown box at the top of the window (above the tree view) to select the cropping year you wish to copy the field from.
      II. Click the field name within the tree view on the left so it's highlighted and click **Copy Source Field** button.

   c) If you want to <u>copy the field and ALL of its splits</u> together with allocated crop and variety (you can change the crop and variety in one or more splits later if necessary):
      I. Use the 'Source field from' dropdown box at the top of the window (above the tree view) to select the cropping year you wish to copy the field from.
      II. Click the field name within the tree view on the left so it's highlighted and click **Copy Source Field With Cropping** button.

   d) If you want to copy some but not all of a previous years cropping for a field:-
      I. Use the 'Source field from' dropdown box at the top of the window (above the tree view) to select the cropping year you wish to copy the field from.
      II. Click the field name within the tree view on the left so it's highlighted.
      III. Click the cropping record(s) within the 'Copy selected field Parts' box on the right so they are highlighted, and click **Copy Selected Source Parts with cropping** button.

e) If you want to add a completely new field never before used in Gatekeeper, click the **Add New Field** button at the bottom.



4. A new cropping record will be created to which you should allocate the appropriate crop and variety if necessary.

5. Click **Next Field** button (bottom right corner) to display the 'Add Field To Cropping Year 20??' window again. You will see that the field list reduces as the cropping is allocated.

   NB: To allocate the same crop and variety to the next field as the previous one, select it and click **Copy Source Field**. A new cropping record for the field will be created using the same cropping allocated to the previous field.

If you are **not cropping a particular field in this season** do not create a cropping record for it in the new year. It will be available in subsequent years if required, but will not appear in the new year field list unless you subsequently create a cropping record for it in that year.

IMPORTANT:

Remember to click **Save** as you go. DON'T CLICK **Cancel** unless you want to lose all changes since your last save. If you do make a mistake, click **Save** and then edit the field to correct the error.

The 'Cropping Summary' window

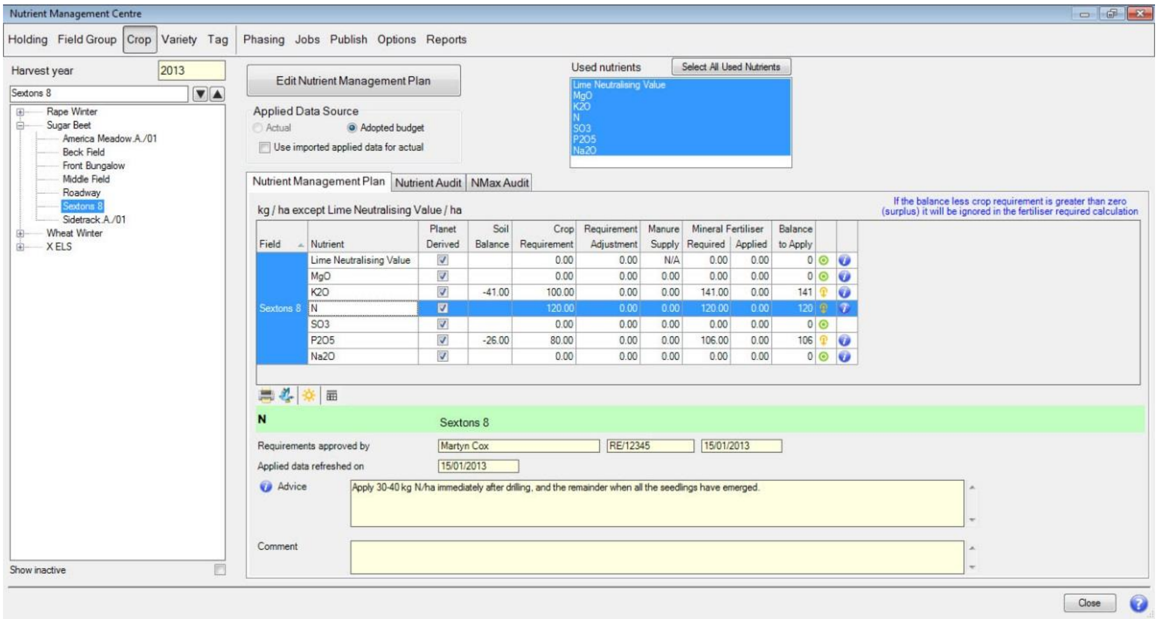
In this window you can review the cropping for the current year and previous/following years. You can also (for example) amend cropping, split a field or add Buffer Zone information in any year by first clicking any cell in the column for the crop year in which you want to work. You will notice that the button in the centre will change colour to match the chosen year and the button text will include the year name. Click this button to open the 'Setup Fields' window and amend any field details as required.

Reporting on fields.

In each Gatekeeper module there are a range of reports specifically relating to that module and the Fields Module is no exception. From the Fields main module window select a field in the tree view on which you wish to report. Now click the **Reports** module option button. Choose the appropriate report e.g. Field Gross Margin and then click **Run Report**. Depending on the specific report that you choose, there may be some options to select before running the report. You can run a field report for the single selected field or for a range of fields.

Nutrient Management

This module option allows you to plan your Nutrient Management strategy and create Nutrient Management Plans using your Gatekeeper data in conjunction with the PLANET RB209 software engine. The Nutrient Management module is valid for both England/Wales and Scottish regions. But there are a few things you need to check first:



- It's important to check that your fertilisers and organic manures have been setup correctly and that their nutrient analysis has been recorded: **Setup** (in the top menus) ► **Products (business)**► in the tree view of the 'Setup Products' window choose **Variable costs** ► **Nutrition** ► **Fertiliser** look through your fertiliser products and fill in the nutrient analysis (bottom right box). Repeat this process for Organic manures. Organic manure type products can be linked to their Planet type equivalent. Click on the '**Planet**' tab and use the appropriate button for your region.

- You need to enter your Telephone Area code so that PLANET can get the standard rainfall figures for your area of the country: **Setup** ► **Holdings** ► fill in the area code of your telephone number, i.e. 01986

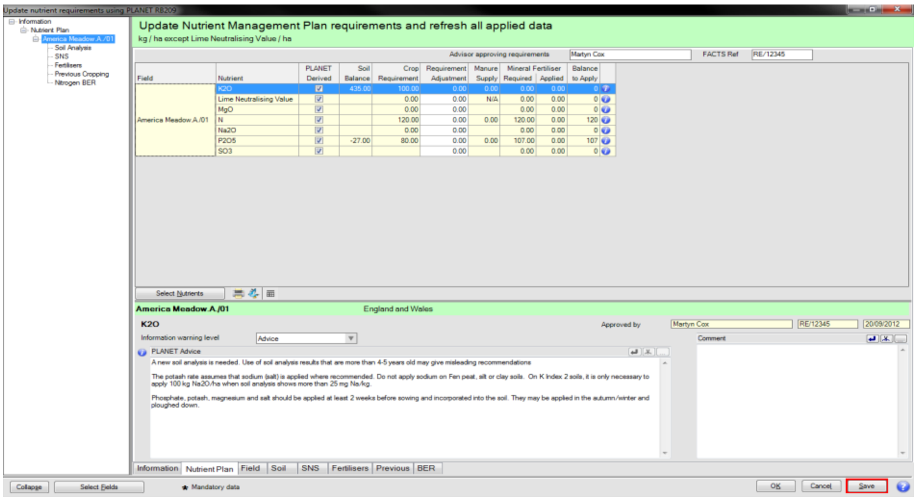
- If you are **in Scotland**, you must select one of the Scottish type Yield Regions in Setup Holdings otherwise it will assume your business is in England. If you have farms in both Scotland and England you should create separate holdings for each and make sure that the fields are linked to the appropriate Holding.

To run a Nutrient Plan:

1. Click **Nutrient Management** (second module option) and the 'Nutrient Management Centre' will appear. Choose the field(s) that you want to include in the Nutrient Plan by selecting them in the tree view.
2. Click the **Edit Nutrient Management Plan** button and the 'Nutrient Management Plan Update' window will appear. With the default selection of 'Update nutrient requirement using PLANET RB209' picked, click the **Update** button (Bottom right hand corner). For more information on the other options within the window, see imbedded help.

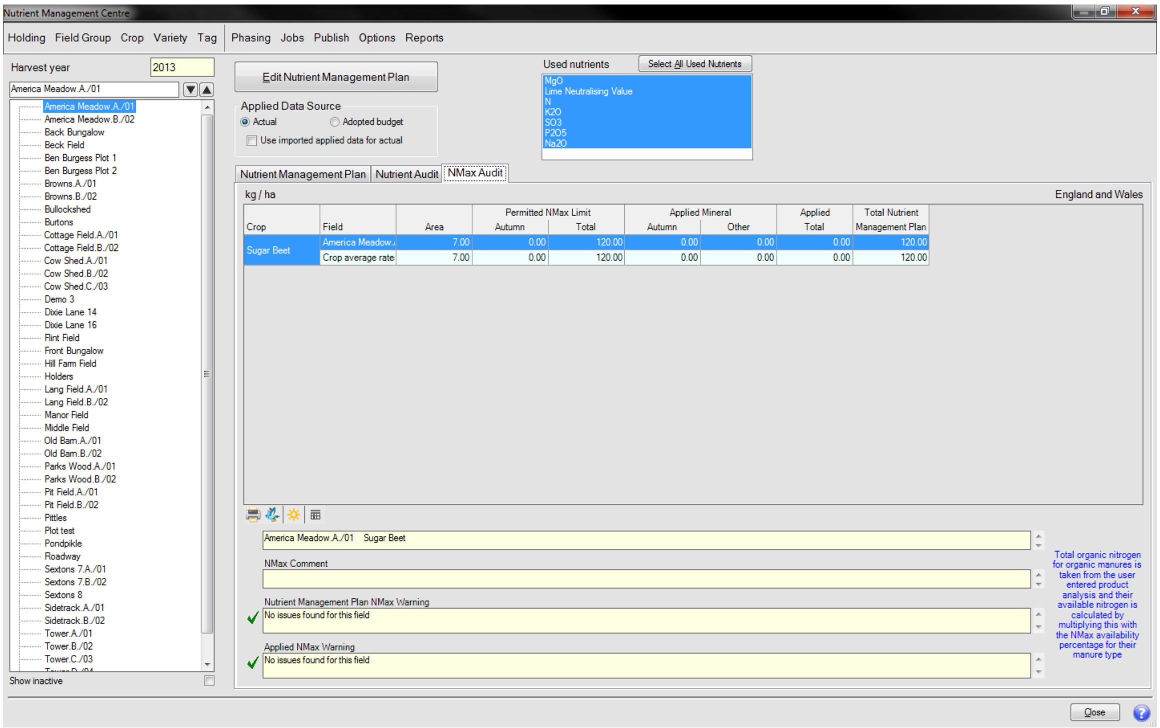
3. The 'Sampling Heading Selector' window will appear. Select the nutrients that you wish to include in the Nutrient Plan and click **OK**.
4. NB: If running Nutrient management for the first time, you must select all nutrients. This is because some nutrient management reports include all nutrients and cannot except a null value. Click the **double arrow** to transfer all items across to the right hand side. Click **OK**.

5. The 'Nutrient Management' window will then appear with recommendations for each field.



NB: Certain information is required for the nutrient calculation. If any of these details are missing the field/s will be marked with a red cross. Required data fields can be found by clicking the '**Field**' and '**Soil**' categories in the tree view and are marked with an asterisk. In addition the '**SNS**' (Soil Nitrogen Supply) is calculated on previous cropping by default. If there is no previous cropping information, you will either need to add it, or manually add a measured SNS figure before the nutrient requirement can be calculated.

6. Click **OK** to return to the 'Nutrient Management Centre'. You will now have a fully populated Nutrient Management Plan, Nutrient Audit and Nmax Audit. The screenshot shows the NMax Audit tab.
   NB: For the Nmax Audit to work, fields need to be set as 'in NVZ'. This can found on the main field setup. (See imbedded help on field details for further information).



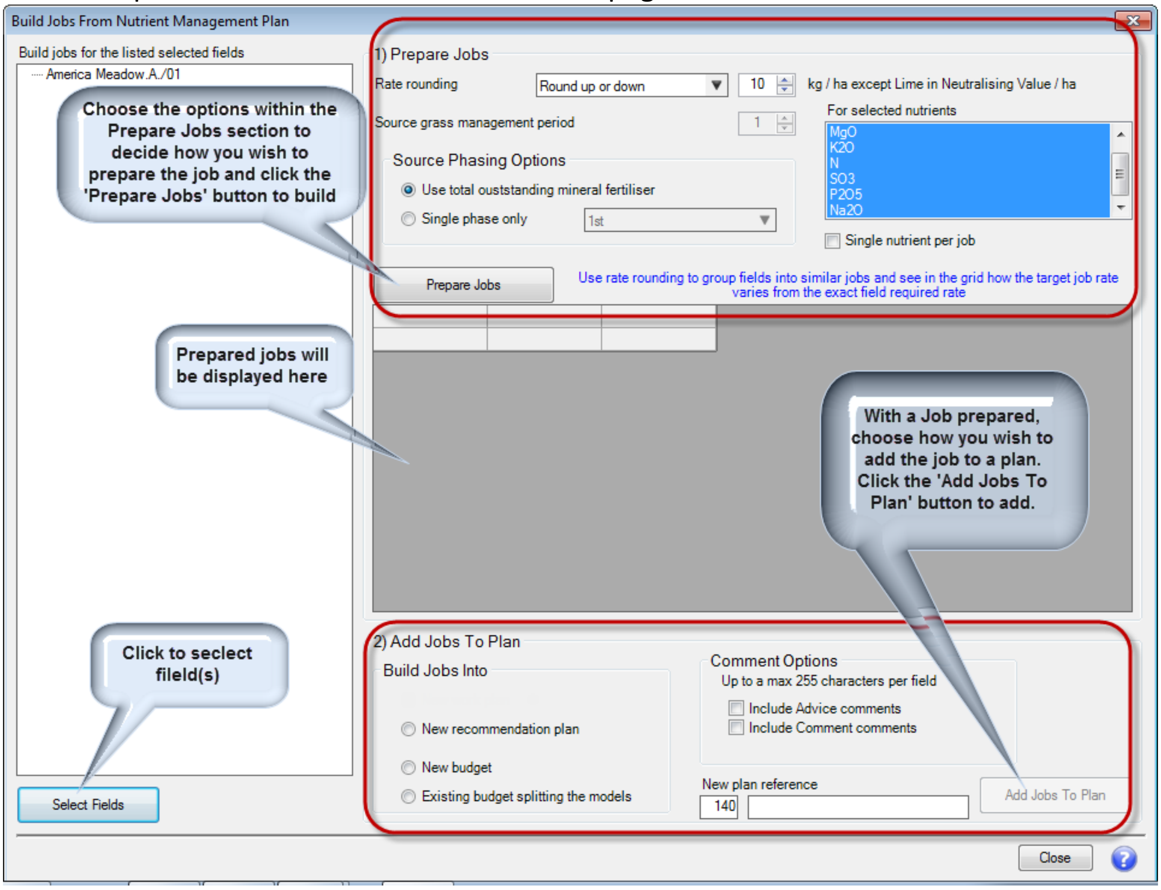
Building a Nutrient Job directly from Nutrient Plan:

1. Once the nutrient plan has been run (follow steps for 'To run a Nutrient Plan' on previous page), click the **Jobs button** at the top of the 'Nutrient Management Centre' window.

2. If not already displayed in the treeview, click **Select Fields** button (directly beneath tree view) and pick the fields intended for the job.

3. Within the 'Prepare Jobs section' (see image over), choose the options to decide how you wish to prepare the job and click the **Prepare Jobs** button to build.

4. With a Job now prepared (see image over), under the 'Add Jobs To Plan' section, choose which type of plan to add the prepared job(s) too. Use the 'New plan reference' box to name the plan. Click the **Add Jobs To Plan** button to add.
5. Click **OK** to save and exit or to convert a Nutrient recommendation to a product based recommendation see step two of the 'To convert a Nutrient recommendation to a product based recommendation' on page 30.



Recording Module

You can add new field records (NOT Recommendations) to Gatekeeper via the Recording module. Use the Recording module if you want to add new records for operations that have already been carried out and for which you did not create a Recommendation.

All of this type of data is job based. A Job is defined as one or more fields treated with the same product/s and rate/s (although rates can be changed across fields within a job using the Complex Proportion and Share Used methods – see later notes). The advantage of using a Job structure is that the Job in its entirety can be recalled later if it needs editing instead of having to find and edit individual field records (for example to correct an inputting mistake).

There are various **Job types**:

- **Field Operations** – The most commonly used job type, used to add products and machinery records to fields and also record harvest type operations.
- **Field Operations Express** – Only used when there is a backlog of historical records to add to individual fields (can be several fields). For example for new users starting part way through a season.
- **Field Operations Machinery Only** – Only used to add machinery records with no associated product.
- **Field Operations Products Only** – Only used to add products without any associated machinery record.
- **Field Sampling –** Used to add soil sampling results to fields.
- **Field Nutrients** – Used to build a job based on nutrient required rather than fertiliser product. These jobs can then be converted into product based jobs.
- **Field Diary Notes** – Used to add diary notes rather than products to fields. (Notes can also be added at the same time as making an Operations type job also)

Completed jobs are shown in the tree view of the main window, listed by date of recording. By highlighting a date, the associated job details are displayed on the right

Adding a Job

For new users starting part way through a season needing to enter a backlog of data to each field, otherwise go to next section:

1. Click **Add Job** (first module option).

2. In the 'Add New Job' window, choose 'Field Operations Express' from the drop-down list on the right and click **Add Field Operations Express Job** (middle).

3. In the ‘Field Selector’ window, select the first field (or selection of fields as long they have had the same treatments e.g. all rape fields) that needs to be updated. Click **OK**.

4. In the ‘Product Selector’ window, select the product(s) you wish to add to the field, starting with the first operation (e.g. ploughing). Remember you can type in the first few letters of the product’s name in the search box above the tree view to save scrolling through the whole tree view list.

5. Enter the date and rate, or quantity, for the product and then select the next product (e.g. power harrow). Repeat this process for all operations and products applied to the field up to the current date.

6. Click **OK** and Gatekeeper will create the jobs that you have just entered within the ‘Recording Setup’ window. Check the data is correct and then click **OK** to save the data and return to the main Recording window.

7. Repeat the process for each field (or group of fields), until all your field records are up-to-date.

For users who wish to add records to individual, or groups of, fields:

1. Click **Add Job** (first module option).

2. In the ‘Add New Job’ window, choose ‘Field Operations’ from the drop-down list and click **Add Field Operations Job**.

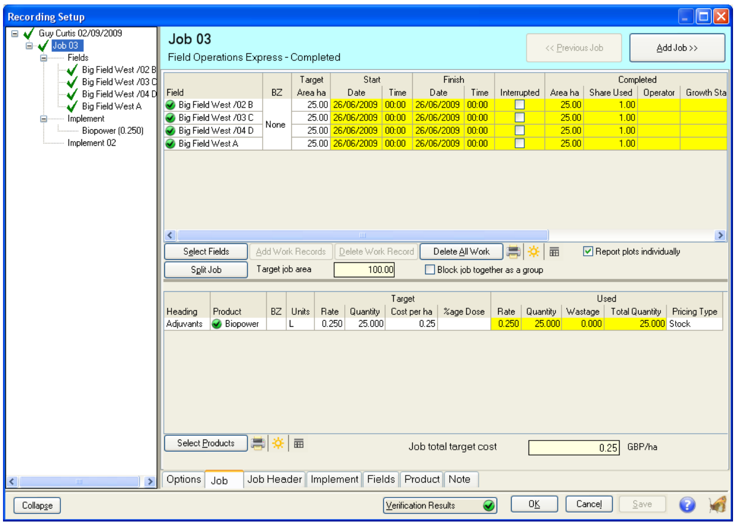
   N.B: You can add other records apart from Field Operations - Field Diary Notes or Field Sampling; choose either option from the ‘Add New Job’ window drop-down lists.

3. Select the field(s) you wish to add records to in the ‘Field Selector’ window.

4. Select the product(s) you wish to record to the selected field(s) – e.g. If you are fertiliser spreading, you would add the appropriate operation from within Fixed Costs (e.g. “Fert Spread”) and the appropriate fertiliser from within Variable Costs; If

you were combining cereals, you would add ‘Combine’ from within Fixed Costs and the output product from within Outputs. Once selected, click **OK**.

5. Fill in the yellow cells in the ‘Recording Setup’ window (see above) as required. Double clicking on some cells will cause a drop-down list of options to appear (weather conditions etc). If you have several fields within a job, you can tick the ‘Block job together as a group’ box (middle centre) and the start / finish dates will be universal. Below the fields grid there is an “Add Work Records” button. This is a quick and easy way of adding times and dates to the fields. See the detailed help for further information on this option.



6. You can add more information to the job by using the tabs at the bottom of the window, e.g. the ‘**Job Header**’ tab allows you to record your reasons for doing the job or other comments that will show up on any field traceability report. Similar options are available to add product and field comments.

7. Click **Save,** then **OK** when you are finished.

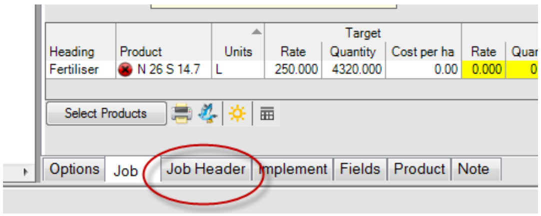
NB: If you wish to repeat a job, choose the job type and then the ‘Copying from the selected job’ option in the ‘Add New Job’ window and highlight the job to be copied in the tree view. Click **Copy Field Operations Job (**or **Copy Plan** if you are in the Planning Module).

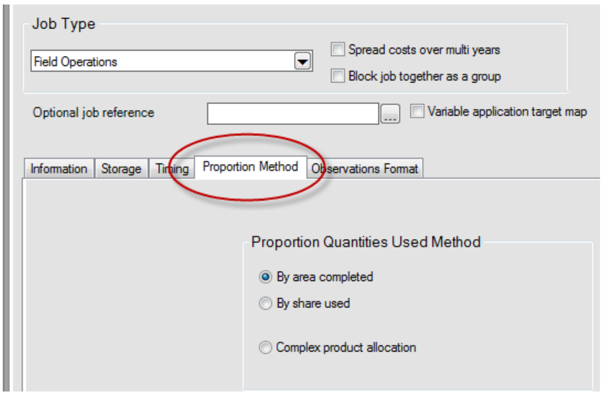
You can edit any job at a later date by using the **Edit Job** module option.

Complex and Share Used proportioning methods

In a recording Job the total product quantity is normally apportioned to each field on the basis of the field area to which the products were applied. However, there are two other proportioning methods which can be used giving great flexibility.

Unless otherwise specified products will always be apportioned on the basis of area. To use either Share used or Complex methods, first create the Job as normal selecting the Job type, fields and products. In the Recording Setup window click the **Job Header** tab and then the **Proportion Method** tab. Choose the appropriate method.

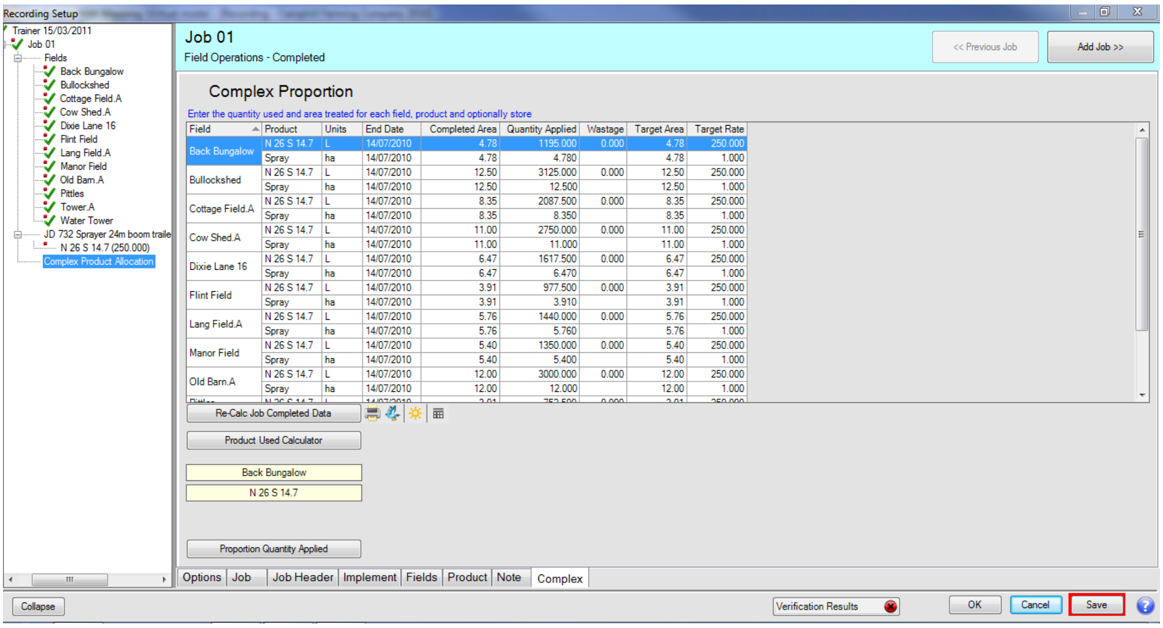




Share Used – Use this method if you have changed calibration part way through a job between fields and have therefore used different application rates on fields within the same job. You can enter the approximate amount of material (or mix in the case of a spray operation) against each field and the actual total amount of each product used. The product will be proportioned on the basis of the Share used figure rather than the application area. This is useful when fertiliser spreading for example and the first field applied is over the target rate. Make a note of the approximate amount of material used on that field (which will later be entered in the Share Used box) and then adjust the fertiliser spreader calibration before applying the next field. At the end of each field make a note of the approximate amount used on each field. When the Job is completed record the actual amount of total material used. When you

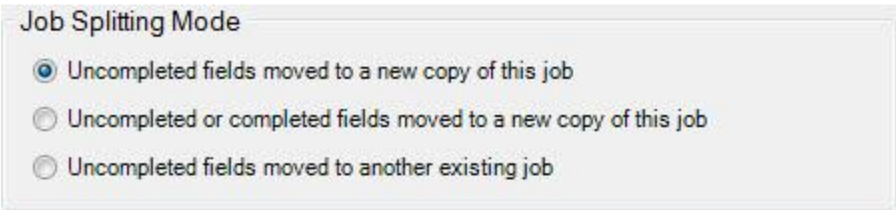
come to enter these details in the Job, set the proportion method to Share Used and then click the **Job** tab where you will see a new column labelled **Share Used**. Enter the share used amount for EVERY FIELD in the Job and the total amount of product used in the **Total Quantity** box.

Complex product allocation – Use this method when you know the absolute amount of each product applied to each field in the job and that amount is NOT to be proportioned on the basis of area. When you set the proportion method to Complex product allocation a new tab will appear at the bottom labelled Complex. First record the start/finish and any other details against each field in the Job tab and then click the Complex tab. In the grid in the Complex tab you can edit the Quantity applied for each product against each field. As you do this Gatekeeper will re-sum the total applied in the Job tab for each product. You can also change the completed area and Wastage of each product against each field.



Splitting Jobs

In the Job tab there is a button labelled Split Job. This gives great flexibility when setting up and saving Jobs in either Recording or Recommendations because it allows you to create a Job with all of the details including fields, products, comments etc, but then split out one or more fields moving them into a new job containing all of the same details as the "parent job" then you can tweak the products/rates on the split out job. See image below for three options available.

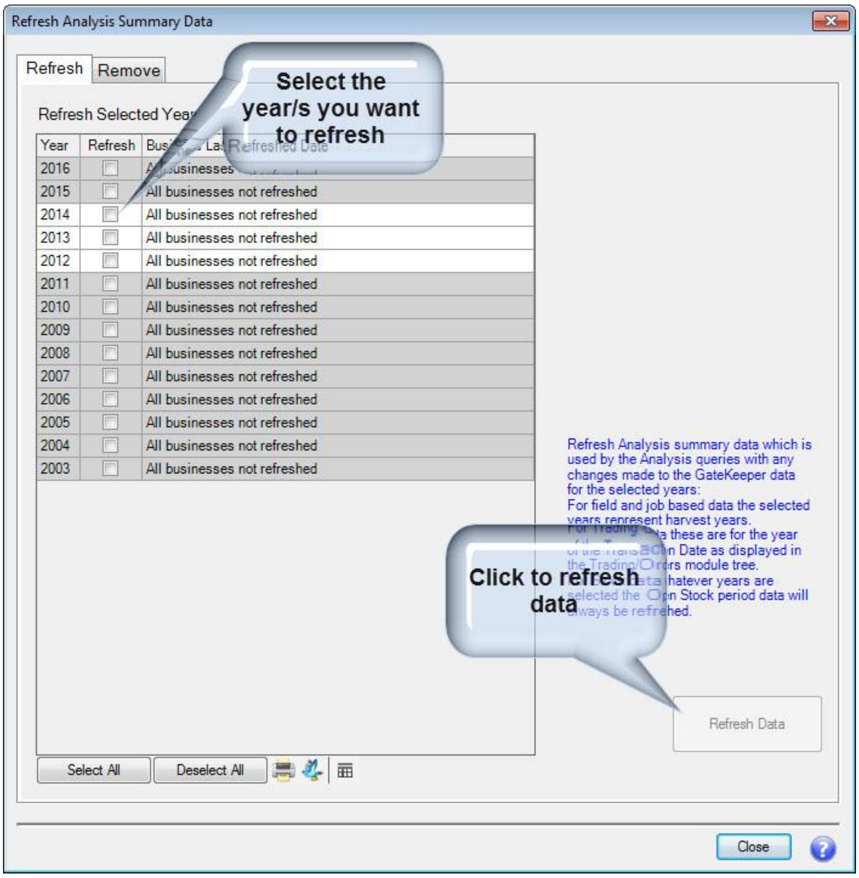


Analysis Module

This module creates reports from summarised data from within Gatekeeper. Report themes include Cropping, Diary Notes, Fertiliser Field Operations, Soil Sampling, Stock and Trading. Also Syngenta Partnership Plan output reports are available on request. You can copy any pre-defined report and then change any aspect of it adjusting it to your specific requirements. They can be viewed on-screen, printed, or exported in XML format which can be opened in most spreadsheets.

Running an Analysis Report

1. Select any pre-defined report from within the tree view of the Analysis module. If this is the first time you have opened a report in that section during this session, you will be taken to the 'Refresh Analysis Summary Data' window (see below). You only need to refresh data if there have been changes to the data since you last used this section.

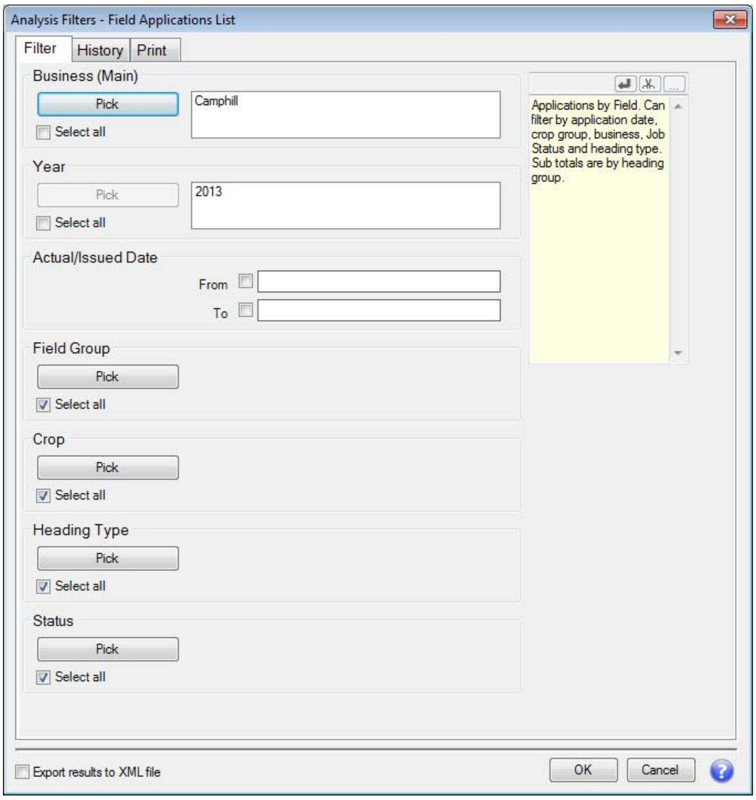


2. Select as many years as you need to be refreshed and click **Refresh Data**. Note: If you change data elsewhere in Gatekeeper it will NOT be reflected in the Analysis

Module until you run the Update process. Once the refreshing process is complete, click **Close**.

3. Either click **OK** to run the report with the default filters (see over) or you can choose your own filters by ticking the 'Select all' box or clicking the **Pick** button for each heading and choose what you want to be included in the report. Ticking the boxes within the 'Transaction Date' area will allow you to specify the start and end date boundaries for the report. Once you have made all your selections you will be able to click **OK** and the report will be displayed in the main Analysis window.

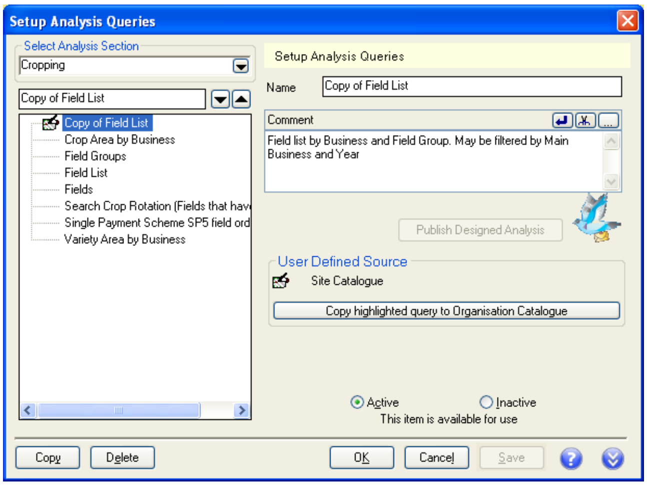
4. If you want to make changes to the report by changing your filter choices, click **Filter** (third module option) and you will be taken back to the 'Analysis Filters' window.



Creating a Personalised Report

You can copy a pre-defined report and then change it to suit your requirements. You can then save this report for future use.

1. Click **Setup** (sixth module option) and highlight the pre-defined report you wish to copy from the drop-down lists and tree view (see right). Click **Copy** (bottom left) and the ‘Copy of…’ will be listed in the tree view. You can rename it as you wish by clicking in the ‘Name’ box. Then click **OK**.



2. Choose your filters from the ‘Analysis Filters’ window. Click **OK**.

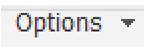
3. Once the report is shown in the main Analysis window, click **Options** (first module option) and then the ‘**Options**’ tab. Tick and/or untick boxes from the ‘Visible’ column to make up your report. Click **OK** and pass through the ‘Analysis Filters’ window again. Click **OK,** and your new report is shown in the main window.

To print out a report, click **Print** (Seventh module option) or to export the report as XML (which can be imported into most modern spreadsheet packages) click **Export** (third module option).

Creating a Chart for a Personalised Report

You can create a graphical representation of your personalised report using a variety of Chart styles. This can be displayed on screen and printed out.

1. Copy a pre-defined report as per steps 1-3 on the previous page.

2. Once the report is how you require it, click on the **Options** drop down arrow and select **Chart Settings**. 

3. On the **Analysis Options** screen, tick the box to ‘Include a graphical representation (chart) of the grid data’. Select the headings to be displayed in the X and Y Axis Columns. Click **OK.**

4. The chart will be displayed on the screen. The Chart and Grid can be hidden from view by clicking the **Hide** buttons at the bottom of the screen.

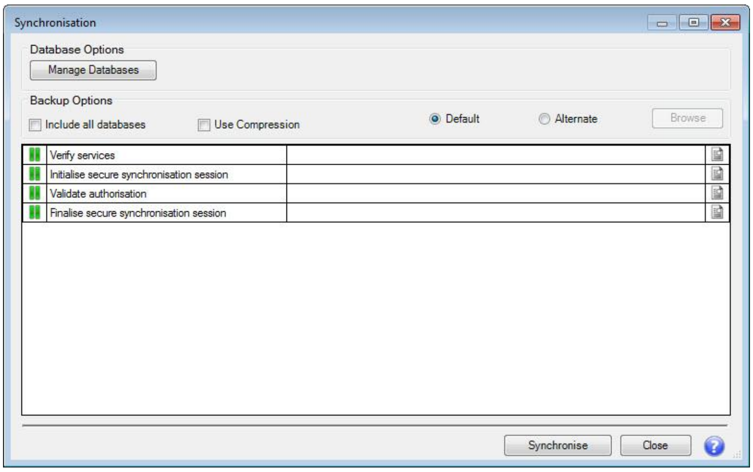
5. To edit the Chart, click on the **Options** drop down list and select Chart Settings or Styles as appropriate. The Chart can be printed/published with or without the Grid.

Farmplan gatekeeper

Synchronise Module

It’s essential to synchronise regularly - preferably at the end of each working session when changes have been made to the data. During synchronisation, your data will be backed-up, any updates for Gatekeeper or Sentinel will be downloaded and applied, and publications will be sent and/or received.

When you synchronise Gatekeeper, a data backup will be created automatically. The backup file will be placed in a default location or in a user defined location. Gatekeeper will keep the last three backups in any one location, automatically replacing the oldest one when necessary. Gatekeeper “Data Secure” users will also have a secure data backup on the Gatekeeper remote servers which will be updated at each synchronisation.



For Data Local users

You can either back-up to the default location (on your hard drive) or chose an alternative location wherever you like. Once you have designated an alternative location, each time you synchronise the back-up will be placed there, unless you change it again. The last three backups are maintained in any one location with the oldest one being overwritten on the fourth backup. Clicking **Synchronise** will begin the process and any downloads will be collected from the Gatekeeper server. When synchronisation has finished, click **Close** and Gatekeeper will self update and require you to log on again to re-enter the program, or exit.

For Data Secure Users

During the synchronisation process, your data will be securely backed-up to the Gatekeeper server and your previous data on the server will be overwritten. In addition a local copy of your data will be made on the hard disc of your computer. You can either back-up to the default location (on your hard drive) or chose an alternative location wherever you like. Once you have designated an alternative location, each time you synchronise the back-up will be placed there, unless you change it again. The last three backups are maintained in any one location with the oldest one being overwritten on the fourth backup.

Clicking **Synchronise** will begin the process and any downloads will be collected from the Gatekeeper server. When synchronisation has finished, click **Close** and Gatekeeper will self update and require you to log on again to re-enter the program, or exit.

Farmplan gatekeeper

Sentinel Module

When you run Gatekeeper the Sentinel module is loaded automatically. If you want to access any of the other modules, just click the appropriate module button. You don't have to close Sentinel first.

The Sentinel module gives you access to a wealth of agronomic information including pesticides and pesticide labels, best practice details provided by manufacturers in the Technical updates section, Nutritional and fertiliser information in the Fertilisers section, Variety recommended lists in the Seeds and Varieties section and much more.

Every time you synchronise, Sentinel checks for updates making sure that all information is current.

Sentinel Verification

All copies of Gatekeeper are capable of verifying Recommendation or Recording Jobs. However, only users who have subscribed to the optional SentinelActive module (Currently UK only) will have their recommendations verified against UK crop approvals for supported pesticide types (Herbicides, Insecticides, Fungicides, Growth Regulators, Molluscicides).

On Sites not subscribing to SentinelActive, verification will be against any user-defined checks added to either the Site or Organisation catalogues, user-defined protocols and if the Nutrient Management module has been used, fertiliser jobs will be verified against the calculated required nutrient less that already applied (plus issued recommendations). Jobs will be checked against calculated individual field NMax totals also.

Users should note that the final responsibility for the integrity and correctness of their recommendations lies with them.