Farmplan
Time to grow

Gatekeeper Grower

Setup & Quick Start Guide

Grower Edition

Gatekeeper Version 3.5 – June 2016

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Contents

Introduction to This Guide

Welcome to Gatekeeper software from Farmplan Computer Systems.

This guide is intended as a quick start-up guide to Gatekeeper for new users who are starting from scratch, and for those users who are converting data from MultiCrop.

It will be best to work your way through the guide step-by-step, taking note when to skip to other parts of the guide to miss out irrelevant sections – this mainly applies to new users who don't have to import existing data.

The guide is split into two parts. Part 1 covers Gatekeeper installation, setting up a new business, 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.

As this is a quick start-up guide, it's beyond its scope to provide detailed help and support. If you require this, please click on the icon seen below, which will appear on every screen within Gatekeeper.

The icon with the question mark takes you to the embedded detailed Help. You can always 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 1

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.

If you are converting MultiCrop version 3 data, it's important to check that your MultiCrop business years are linked correctly with the STAN years, otherwise your data will 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 then please ring support for assistance.

1. **Windows Vista, Windows 7 & 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.**

2. **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**.

3. 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 18).

4. 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**.

5. 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.

6. 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.

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

9. 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**.

10. 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 79).

11. 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 both 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.

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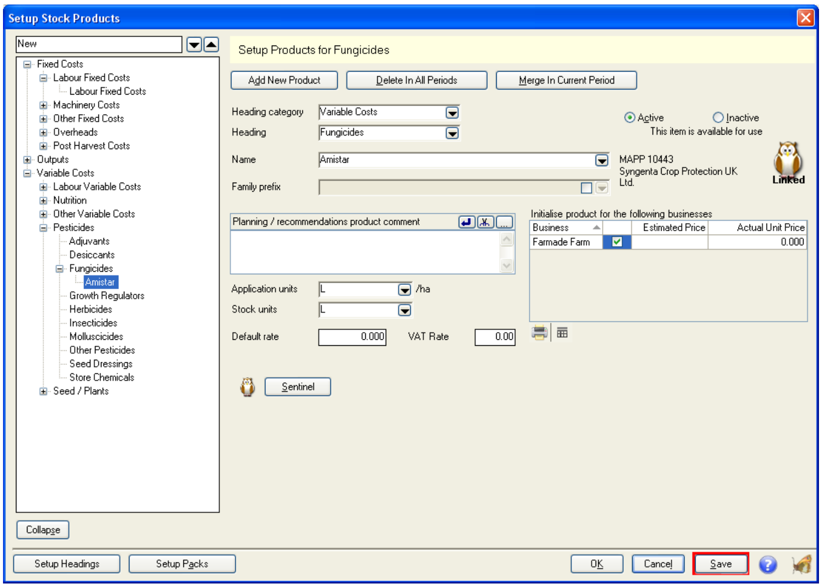
Basic Setup Conventions within Gatekeeper

The program does look different to MultiCrop (for new users, that was the previous Farmplan crop management software), but please don't be worried by this. You will master Gatekeeper in no time!

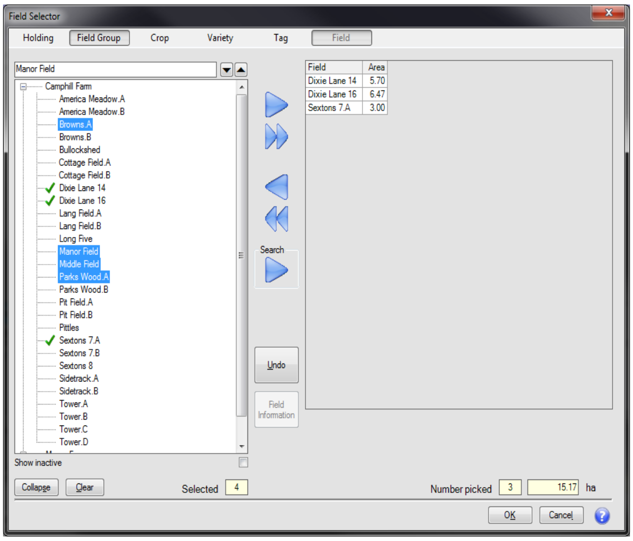


The screenshot (right) is taken from the 'Setup Stock Products' window. As you can see on the left hand side there is a 'tree view', which gives you an overview of the categories and headings, which are preloaded into Gatekeeper. If you want to see what is included under each category or heading you need to either click next to the item or double click on the item to expand the list; to condense 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 'Setup Stock Products' window, you can see the basic product details for Amistar.

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

At the bottom of every window are these buttons shown on the right. They govern how your work is saved throughout the program: When you click **OK**, any changes that you have made will be saved and the window closed. When you click **Save** any changes made will be saved and the window will remain open. When clicking **Cancel** a warning sign will appear; 'Caution - if you click Yes you will lose all data since you last clicked Save. Do you wish to continue?'



The screenshot to the right shows a 'Selector' window, which are 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.

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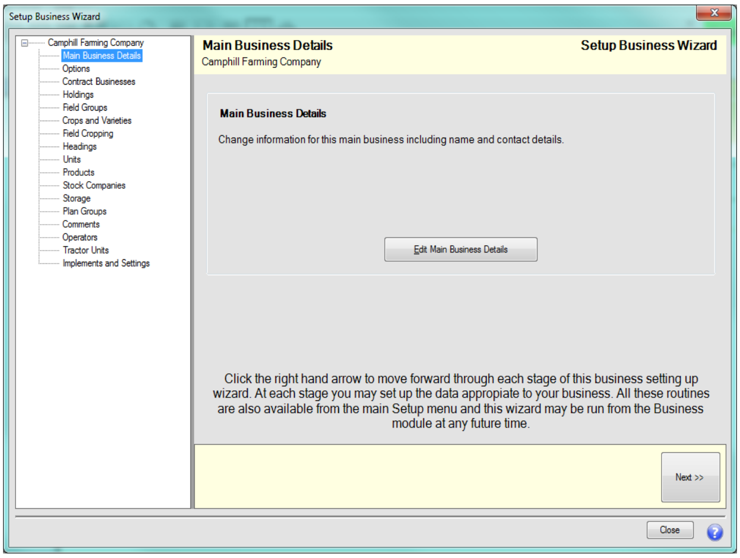
Adding a New Business (new users not converting data from MultiCrop)

(MultiCrop users can skip to page 13, but it may be useful to read through the setup process as many terms you will encounter within Gatekeeper are explained in this section.)

1. With the default 'Add a new business' option selected, click **OK**.

2. Your business needs a name; by default it's named 'new'. To replace this, click in the **Name** box and replace 'new' with your business name and click **OK**.

3. Your business name will now appear at the top of the tree view on the left (see screen-shot on right). Under this name are the setup headings that are available in Gatekeeper – you need to input your business's details into these headings. To move though the headings you can either select them from the tree view or click **Next** or **Previous**.



The following notes will help you with the basic set-up. Please refer to the embedded Help for further details.

Holdings – these belong within your business and represent your official Holding Number. You will automatically be given a 'Main Holding' (you can change this name by editing, as in step 2), but if you have more than one, sub-holdings can be added.

Field Groups – these are groups of fields, but it's up to you how you group fields. It can be as traditional farms, by location (e.g. North Block) or by some other criteria. Field Groups are also used to associate Fields with Contract Businesses. You can have as many Field Groups as you like.

Crops and Varieties – this is where you setup your Crops and Varieties. They are organised into three tiers: Crop Groups (e.g. Wheat Winter), Crops (e.g. Feed Wheat, Milling Wheat), and Varieties (e.g. Chianti, Arran). When you activate a Crop Group, e.g. Wheat Winter, a linked Crop will be created automatically; in this case, Wheat Winter. If you want to have your own crops, e.g. Wheat Feed or Wheat Milling, etc, you can add these below the appropriate Crop Group. If you don't want to use the automatically created Crop (Wheat Winter) make this Inactive by using the button in the bottom half of the screen. Making an item inactive turns it grey in the tree view.

Field Cropping - this section allows you to setup the fields within your Field Groups and allocate their cropping. For more details see **Setting up Fields and Cropping** in the Fields Module section, page 45

Products – any incoming or outgoing products to the business should be setup here. This includes all variable costs (e.g. pesticides), fixed costs (e.g. machinery costs) and outputs (e.g. harvest and area aid). For more details see **Setting up New Products** in the Stock Module section, page 24

Stock Companies – these are any businesses that you trade with as suppliers or buyers.

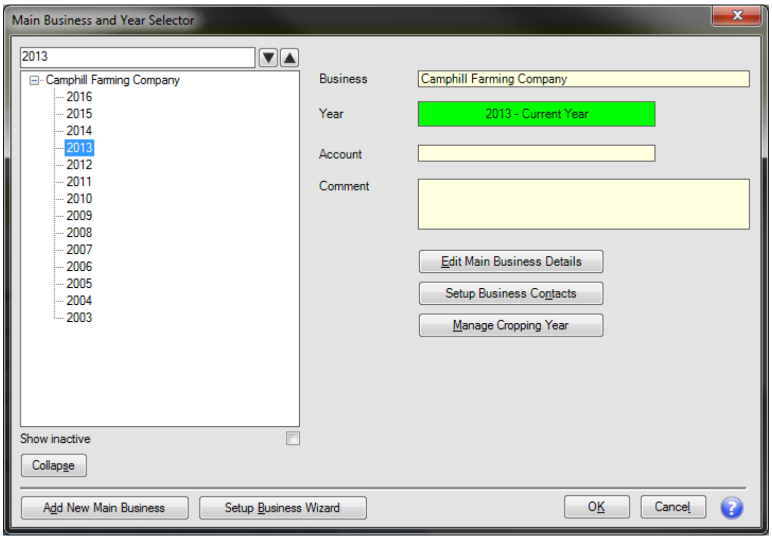
Operators – the names of all the workers on the farm; required for traceability and HSE records.

Tractor Units – the different tractors, harvesters, etc. which are used on the farm; which, again, are required for traceability and HSE records.

Implements and Settings – the different implements used on farm and their settings; again for traceability and HSE records.

It isn't necessary to setup all of these headings in one sitting. The **Save** and **Synchronisation** functions will store all of your information at each sitting and when you log back into Gatekeeper you just need to click into **Setup** at the top of the main Gatekeeper window to continue.

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 screen-shot right).



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. By clicking **OK**, you will be taken into the main Gatekeeper screen.

You should now skip to page 17 "First Steps" and also refer to page 18 to familiarise yourself with Gatekeeper layout and screen conventions.

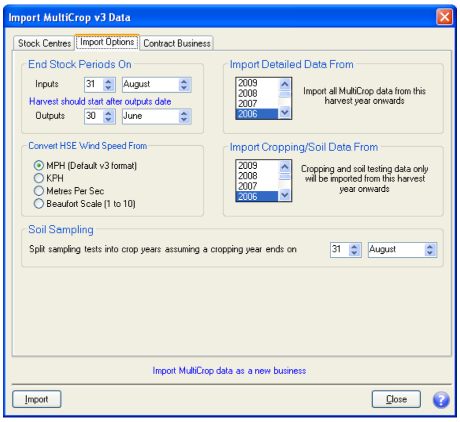
Importing a Business from MultiCrop (Only relevant to those converting data from MultiCrop)

1. Choose the 'Import a business from MultiCrop Version 3' option and click **OK**. If you are converting multiple stock centres into Gatekeeper please call the support line for further help.

2. The 'Import MultiCrop v3 data' window will appear, listing the MultiCrop stock centres which are held on your computer (default is within C:\ drive). Highlight the stock centre you want to import and then select the '**Import Options**' tab. If you have more than one stock centre then import the main stock centre first and return to import any subsequent stock centres. The subsequent stock centres will almost certainly be imported as contract businesses.

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

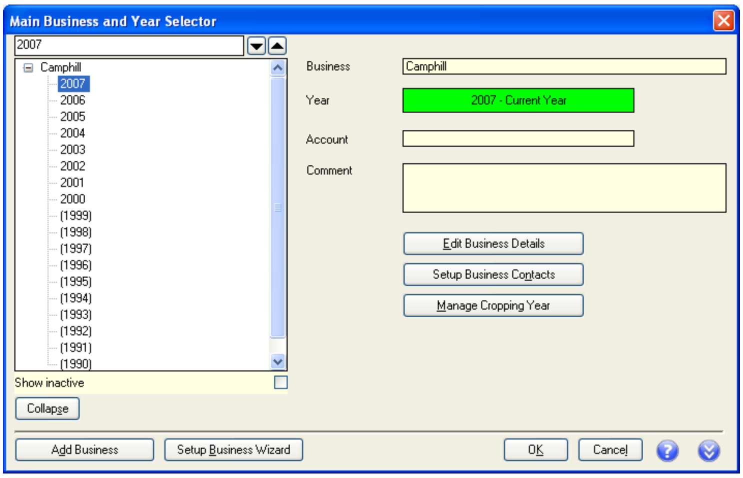
    - There is an essential difference between Gatekeeper and MultiCrop re. the relationship between the Stock Period and the Cropping Season. In MultiCrop, the Stock Period was automatically set to follow the Cropping Season so when you started a New Year, a new Stock Year was also created. In Gatekeeper, you have to start a new Stock Period, as well as a new Cropping Season – they are completely unrelated. This gives a great deal more flexibility and allows more reliable stock management. With that in mind, the 'Import Options' window (see right) is asking you to set the end of your Stock Periods (top left) based on the last date that inputs will arrive on farm, and the last date outputs will leave the farm within the Cropping Season. They are set by default to 31 August for inputs and the following 30 June for outputs. This should work well for the average cereals farm, but if you are a soft fruits or vegetable grower you can adjust these dates here.



    - Within the same window, you can control 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.

4. Click **Import** and your MultiCrop data will be converted and imported into Gatekeeper. When the process has finished, click **Close**.

5. You will now see the 'Main Business and Year Selector' window (see below). Your Main Business name will appear at the top of the tree view, followed by the years that you imported. Years in brackets are those just containing past cropping, soil testing, field and agronomy notes, etc. To select the year that you want to work with, highlight it in the tree view and click **OK**. This will take you into the main Gatekeeper screen.



It's now important to check through, and 'tidy up', some sections of Gatekeeper to ensure that your data converted correctly and that you begin with tidy data.

'Tidying up' Converted MultiCrop Data

1. Print out a 'Cropping List' from both Gatekeeper and MultiCrop and compare field cropping and areas.
   In MultiCrop:
   Advanced Reports ► 'Field Cropping List' ► **Run Report**
   In Gatekeeper:
   Fields Module ► **Reports** ►'Cropping' ►**Run Report**

2. Whilst in the 'Cropping' report in Gatekeeper also check for any duplication of crops and varieties (you may have more than one instance of a crop being spelt in different ways – to Gatekeeper these are all different crops).

   To 'tidy' up any duplication:

   a) Close the report ► **Setup** (in the Top Menus) ► **Crops and Varieties**.
   b) Within the tree view select the crop you wish to remove and its details will appear on the right. Click **Delete Crop**.

c) In the ‘Select Replacement and Delete’ window, select the crop that you wish to replace the deleted crop with, and click **OK**.
NB: all data related to the deleted crop will be absorbed into the replacement crop data.

d) Click **OK** again at the warning message that appears.
e) Repeat the process as many times as necessary. Varieties can also be deleted/replaced in the same manner.
f)

3. Check that the stock lists are as you expected in Gatekeeper. Open the **Stock Module**.

It’s best to familiarise yourself with the tree view and Main Grid first. The current year will be labelled as ‘Open Stock Period’ in the tree view and other converted years will be ‘Closed’. Click on one category at a time in the tree view and all the products within that category will be shown under different headings in the Main Grid. You will find that only those products that were used in your converted years have been imported. Check that the stock lists are as you would expect and also check for incorrect units (e.g. ‘Misc.’).
If you need to change units: Highlight the item in the Main Grid and click **Setup Products** (first module option). You can change the stock units here, and remember to click **Save**.

NB: For pesticide products only, the conversion process will have tried to match every product in your stock list with the same named product in the Sentinel Catalogue. If it has managed, the product will now be linked to Sentinel, in which case the correct active ingredient, LERAP details and MAPP Number will be available. If the conversion was unable to find an equivalent product in the Sentinel Catalogue, then your product will be named as it was in MultiCrop, but it will not be linked to Sentinel.

4. To check for unlinked products, go to **Setup** (in the Top Menus) ►**Products (business)** and select the appropriate pesticide list, e.g. Fungicides and click on each product in turn in the tree view. If the product is linked you will see the Sentinel Owl icon (see below), the manufacturer’s name and the Official reference on the right of the product ‘Name’ box in the main window. If these are not displayed, then choose the right product name in the drop-down list and press **Enter/Return**. Accept the warning that the product name will be changed and click **Save**. If you were using Sentinel Active with MultiCrop, then the MAPP Number of the linked

product will have been used to associate the Gatekeeper pesticide with the Sentinel Catalogue, so the product name will now be exactly the same as the linked Sentinel product and verification will be against this product.

5. Still within the **Stock Module**, all products that were in the MultiCrop 'Cultivations' list will be imported into Gatekeeper under the 'Establishment' heading in the tree view, within the 'Machinery Costs' heading or 'Fixed Costs' category.
   You may wish to move products to one of the other headings in that group which may be more applicable, e.g. Application, Harvest or Other Machinery.
   To do this:
   a) Click on 'Establishment' in the tree view (remove any Filter Buttons which may be depressed). Highlight the product you wish to move in the Main Grid.
   b) Click **Setup Products**. Choose your preferred heading from the 'Heading' drop-down list. Remember to click **Save** after you have finished with your changes.

6. We recommend that you also carry out a stock take and reconcile your stock once you have converted your MultiCrop data (see page 26). This allows you to start Gatekeeper with a 'clean slate' and your 'In Stock' quantities will be correct.

First Steps

If you have started using Gatekeeper during a cropping season you will want to get yourself up to date as quickly as possible, by recording all your field work (product usage) and stock deliveries so far:

1. You need to set up your Fields, Field Cropping, Stock Companies and Products (which you may already have done, otherwise see above).

2. Add your field records using 'Field Operations Express' in the **Recording Module** (see page 54) – this will give you a 'Used Quantity' for each product in the Stock Module.

3. Record a 'delivery' in the **Trading Module** to cover all the quantities of product used within those field operations (see page 40). To find out the total amount of each product used on the fields, go into the **Stock Module** and click on each heading in the tree view and look down the 'Used Quantity' column for each product.

4. Do a physical stock take on farm and if there are any discrepancies between the 'In Stock' quantity and the 'Used Quantity' within the **Stock Module** for any product(s) (after you've added field usage and product deliveries), add another delivery to cover the short fall.

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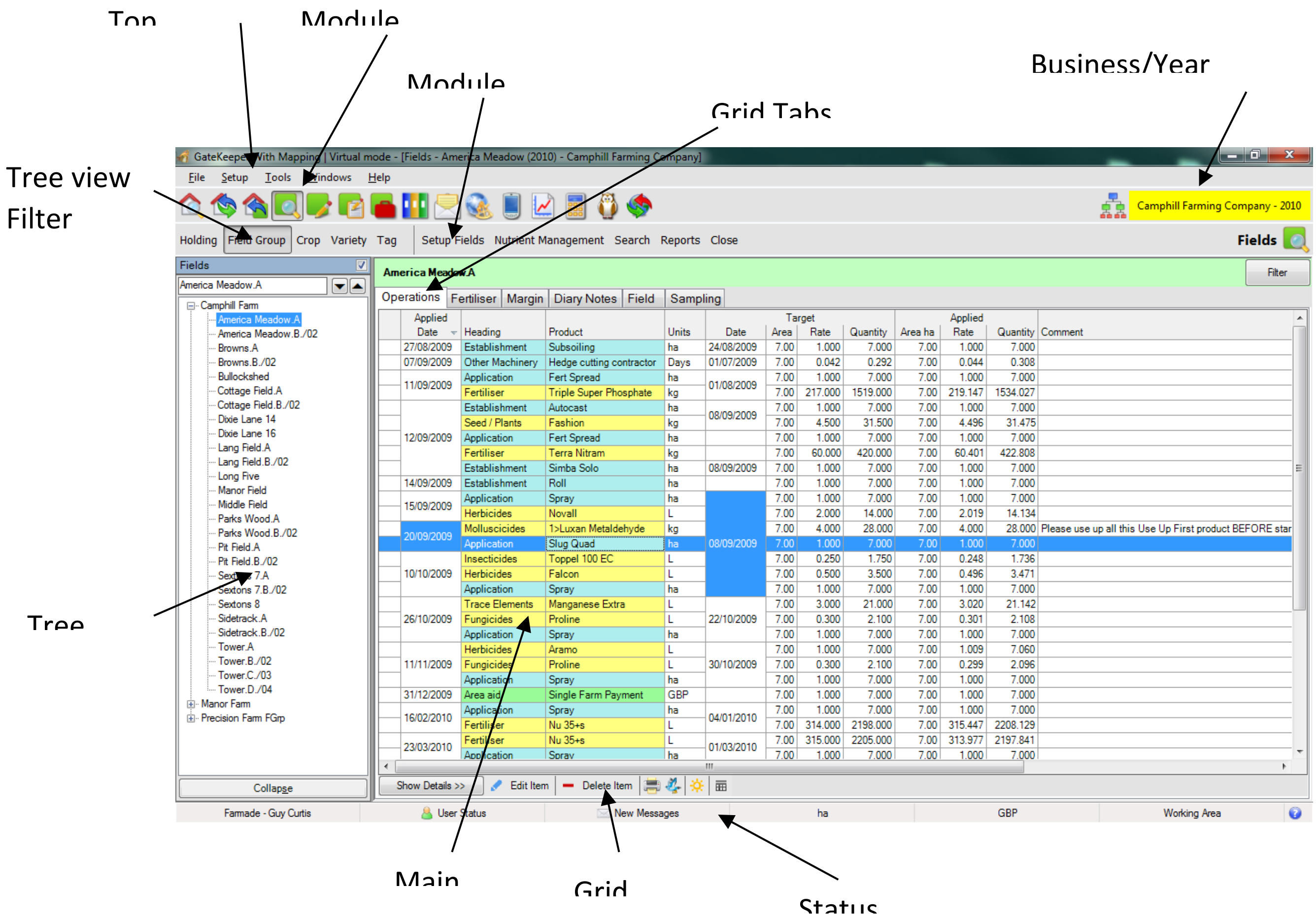
Gatekeeper Layout and Screen Conventions

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

Stock: you can view and edit details for a particular item or product, manage your stock and price lists by reconciling stock quantities and values, close Stock Periods and generate reports.

Trading: use to record any sale or purchase of a product or item; at the order, delivery or invoice stage.

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

Recording: record work done (applications or other jobs) on a field, or group of fields.

Planning: allows you to setup plans for jobs that need to be done and record work done when the job is completed.

Catalogues: you can view, organise and manage the products used by your business (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 the farm business.

Machinery: management and reporting for Tractor Units, Implements and
ators.

Agrilator: contains a collection of calculators and conversion tools for standard 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 or Tag (or a combination of these). The search facility (the blank box above the tree view window) allows you to find specific fields.

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, notifies you when you have received new mail, shows warning indicators (click on the sign to get an explanation) and the currency in use.

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.

By clicking on the column headings, the Main Grid can be sorted by date, product or heading. If you need to change any data within the grid, e.g. quantities, you need to first click in the cell to be edited so that the row is highlighted and then double click on the cell. This will take you to the original data record where you can change the quantity. Remember to then **Save** your amended data.

The Grid Footer allows you to view even more details about an item highlighted in the Main Grid by clicking **Show Details**. You can also delete items and print the grid in this area.

At the bottom of a grid is the print button and publish button allowing you to print/publish the grids as they appear on the screen.

New users: please return to page 17 to begin your 'First Steps'

Converted MultiCrop data users: please continue to find out how to 'tidy up' your data.

Part 2

Stock Module

This module allows you to see what products you have in stock and the quantities you have in stock. You can also see where the products have been used, i.e. on what fields (**Show Details** (bottom of Main Grid) ▶ **Fields Audit** ▶ select the hyperlinked field – underlined in blue – to the original field record). And also the purchase or sales details associated with each product (**Show Details** ▶ **Trading Audit** ▶ transactions have a hyperlink to the original delivery/invoice). In addition you can carry out stock management tasks such as managing the products that you have in your stock lists with stock reconciliations and manage your stock periods.

Each product is under a Heading type (e.g. Herbicides, Fertiliser, etc) and you can choose the stock method for each heading. By default, Area Aid, Establishment, Other Variable Costs and Rebates are set to 'Price List Stock Mode' and all others are set to 'Full Price Stock Mode'. You can change the stock mode if you wish: **Setup** (Top Menus) ▶ **Headings** ▶ Find the heading in the tree view ▶Change the 'Stock Mode for Current Stock Period' ▶ **Save**.

The methods are:

- 'Price List Stock Mode' – Stock product name, unit and unit price. Most suitable for cultivations etc., but can be used for any heading.

- 'Basic Stock Mode' – An intermediate stage between none and full stock quantity tracking. You record sales/purchases to the heading using Stock Management by entering a figure in the "Purchased" column and completing the details

- 'Full Stock Average Price Mode' – This option allows tracking of all sales and purchase movements for the heading and is the default option for all variable cost and output type headings. It will accumulate an average unit price for the open stock period.

- 'Full Stock Last Price Mode' – Manages stock in the same way as 'Full Stock Average Price' however the actual unit price is taken from the last delivery invoice price by date immediately preceding the product applied date or opening unit price if no invoice is available.

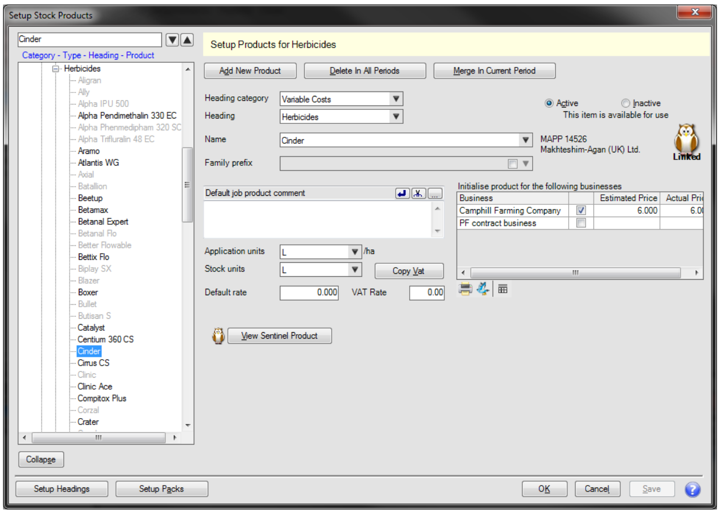
- ‘Full stock Batch price’ (outputs only) – This mode can only be used for output type headings. This mode allows products to be harvested into a Batch. When deliveries are recorded from that batch a price is calculated for each batch (based on the invoices associated with those deliveries). The batch price is used for those outputs recorded into the batch rather than the output product average stock price for the period.

- ‘No Stock Mode’ – In this mode all stock functions are hidden. Product prices will be taken from the ‘Actual Price’ setting in ‘**Setup>Products (business)**’. Individual product prices can be changed by editing them within the job. They can also be adjusted at any time using the ‘Custom Pricing’ function. Please call support for advice on No Stock Mode.

Setting up New Products

If you haven’t initialised any products into Gatekeeper or converted data from MultiCrop, your Stock Module will be empty on opening so you will need to enter products. Even if you are already using Gatekeeper, you will need to add new products periodically.

1. Click **Setup Products** (the first Module Option). Browse the tree view until you can see the heading into which you want to add a new product, and highlight it. Click **Add New Product**.



2. ‘New’ will appear in the product ‘Name’ drop-down list (see right). In the case of pesticides, choose from the drop-down list of UK approved pesticides; any other category will require you to overtype the ‘New’ with your chosen item/product.

NB: If you have chosen a pesticide from the drop-down list, then press **Return/Enter** and the product will become linked to the Sentinel Catalogue (UK only): the Sentinel owl icon will appear to the right of the product name (see above). This means that the active ingredient, the MAPP Number and LERAP details for that pesticide are automatically available. The application units and stock units (middle left in main window) can be different, i.e. you can set the application units to millilitres, whilst the stock units are recorded in litres.

NB: Within the different headings there are various additional details which you can fill in, e.g. under Fertilisers you can specify the nutrient analysis of your liquid or solid fertilisers – essential if you want to create Nutrient Recommendations in the **Fields Module** (see page 45).

1. Tick the box to initialise the product for use in your business, and/or in contract businesses (middle right in window).

2. Click **Save** and continue browsing through the tree view to add more new products; repeating the process.

When you have initialised products, their heading category (e.g. Variable Costs) will appear in the tree view of the Stock Module. Browsing through the category will reveal headings containing all your initialised products.

NB: For new users, there will be no 'In Stock' quantities or 'Unit Price' values until you either record product deliveries into the **Trading Module** (see page 40), or do a stock take and add an 'Opening Stock' quantity and 'Opening Unit Price' via **Stock Management** (type values in the 'Opening Stock' / 'Opening Unit Price' columns). If you add an Estimated Price to a product this will be displayed both in the 'Estimated' and 'Actual Unit Price' columns, and in any field records until you record a priced delivery.

Stock Management

With Stock Management you can do the following:

- Carry out stock reconciliations – A stock reconciliation is the process which allows you to adjust the Gatekeeper stock levels to match the stock levels actually on-farm. There are various tools to allow you to adjust rates to take account of measuring inaccuracies, adjust opening stock, etc.

- Manage Stock Periods – A Stock Period is defined by a start and end date. At the start date there is an opening stock quantity and value. All deliveries up to the end date are added to the stock quantity. The delivery price is taken into account to create an average unit value for each product in the period. All field applications are taken from stock and it is the application date which defines which stock period that application will affect and thus where the price will come from (depending on the stock method chosen).

Normally, a stock period is started at the beginning of the crop season and is finished to coincide with the end of the season. Typically, for an arable farm, the input stock period should start on the 1st August and end on the 31st July in the following year. So it captures all of the inputs (by date) from establishment through to pre-harvest. The **OUTPUT** stock period needs to capture the period from the harvest date of the crop through to the date when the crop was sold (delivered) off the farm.

It is essential that you complete a Stock Reconciliation before you start a new Stock Period (apart from Price List method headings). However it is not essential to create a new Stock period every time you carry out reconciliation. For example, you may wish to reconcile your stock regularly (monthly) but only have one annual stock period. This is fine as you can have multiple reconciliations within each stock period. If you decide to have more than one reconciliation in a stock period, you should use “Locking for Quantities” (see following notes) to ensure that field rates are only adjusted once in the stock period.

How to carry out a Stock Reconciliation for a single business. (Contract business users should see the section - Stock Management and Contract Businesses)

In order to be able to complete a stock reconciliation, all actual deliveries must have been correctly recorded in Gatekeeper and all field applications that have been carried out must also have been recorded in Gatekeeper. Thus the Gatekeeper stock and the physical stock should be similar. Any discrepancy is likely to be due to a measuring or recording inaccuracy which can easily be adjusted during the reconciliation in a variety of ways.

If you have not yet completed the on-farm stock take for your physical stocks, follow steps 1 – 12. If you have already completed a stock take and now want to reconcile the Gatekeeper and physical stock skip to the next section.

1. Print out a stock taking report. In the Stock Module, select a heading from the Open Period in the tree view, click the **Stock Management** module option and in the Stock management form click the **New Stock Take button** (top right).

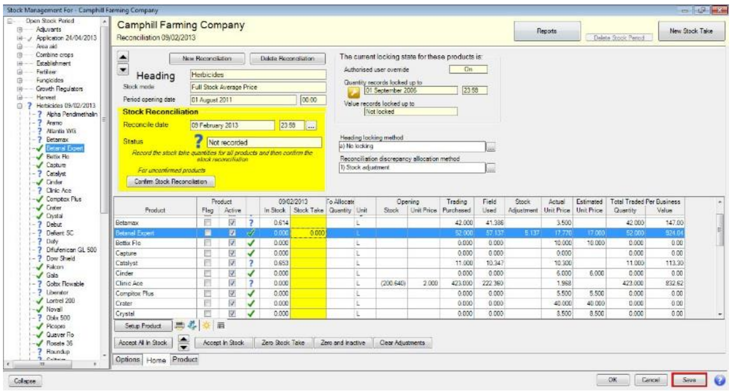
2. In the 'Heading Selector' window, select from the tree view, and using the arrows, the headings you wish to include in the stock take, e.g. pesticides, nutrition, seed/plants, primary output. Click **OK**.

3. The 'New Stock Take' window will ask you to specify the date you want to do the stock take (31st July??) Then click **Stock Take Report**, which will produce a printable sheet that contains a blank 'On Farm Quantity' column. You can take this report to the store to fill in the on-farm quantities.

4. Close the 'Stock Take Sheet' report and you will return to the 'New Stock Take' window. Click **Initialise Headings** and the Stock Reconciliation will be initialised for the headings included in your stock take ready for you to transfer your on-farm totals to later.

5. Go and do your on-farm stock take.

6. Once you have the actual on-farm stock position at the stock reconciliation date you can complete your Gatekeeper stock reconciliation. Returning to the reconciliation, fill in the yellow boxes in the 'Stock Take' column (see right). As you fill in the boxes, the blue question marks next to the product name (which indicates products needing to be dealt with) turn to grey tick marks.



7. When you have finished a heading, i.e. all products show a grey tick, you need to decide two things:
8. Whether to lock the stock take figures or not. If you are planning to do more than one Stock Reconciliation in this Stock Period, you should choose to lock for 'Quantities only', thus preventing deliveries and field records being adjusted more than once.

9. How any discrepancies in stock quantities will be allocated. The default is 'Stock adjustment', but there are 5 options to choose from (see the "stock adjustment methods" on page 32). Select the most appropriate adjustment method to suit your needs, (a full explanation for each type is included with the on-screen help). The method you choose will be saved for the next time you do a reconciliation within that heading. However, each heading can have a different method. Click **OK**.

NB: More than one method can be used in a reconciliation session to manage stock discrepancies. This will allow different products to be allocated as required. See embedded help 'Carrying out a Stock Reconciliation' for further information.

10. Click **Confirm Stock Reconciliation** in the yellow rectangle. Click **OK** at the confirmation window. The grey tick marks will now turn green.

11. Unless you intend to start a new Stock Period (see below), you should click **Save** and either click **OK** to return to the main Stock window, or choose another heading to reconcile.

12. You can change the unit price for “Price List” stock mode headings by changing the ‘Actual Unit Price’ in Stock Management. The new price will be used across the Stock Period.

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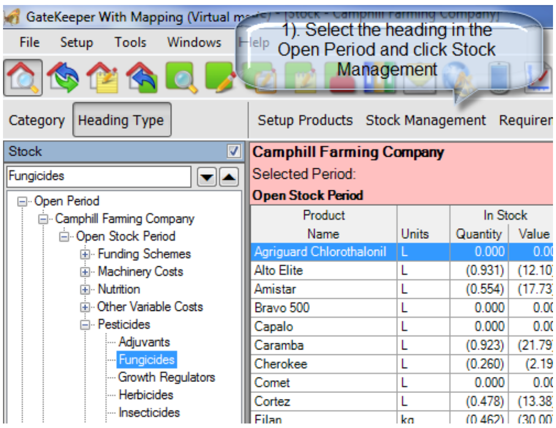
If you have already completed an on-farm stock take and now want to reconcile the Gatekeeper and physical stock do the following (see also the following screen prints):

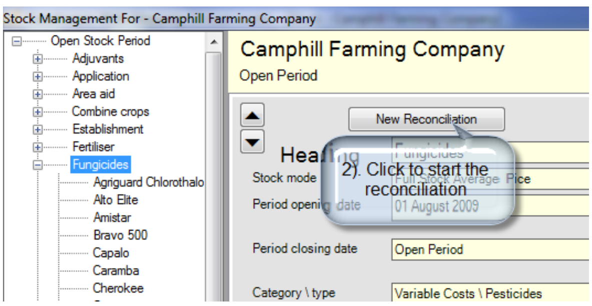
1. From the Stock Module, choose the heading in the Open Period that you want to reconcile and click the **Stock Management** module option.

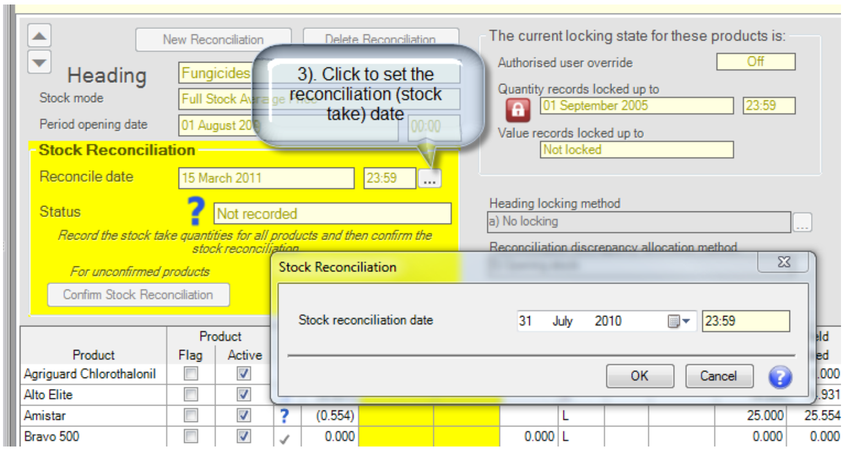
2. Now click **New Reconciliation** and set the **Reconcile date** to the date when you actually carried out the stock take. Gatekeeper will then calculate the stock position (according to its figures) at that date and display this in the **In Stock** column. All you need to do is type the actual stock take figure for each product in to the yellow **Stock Take** column. If the figure that you enter is less than the Gatekeeper In Stock figure then Gatekeeper will need to reduce the stock by using the appropriate Reconciliation discrepancy allocation method (see next section). If the figure that you enter is higher Gatekeeper will use the selected adjustment method to increase the In Stock figure.

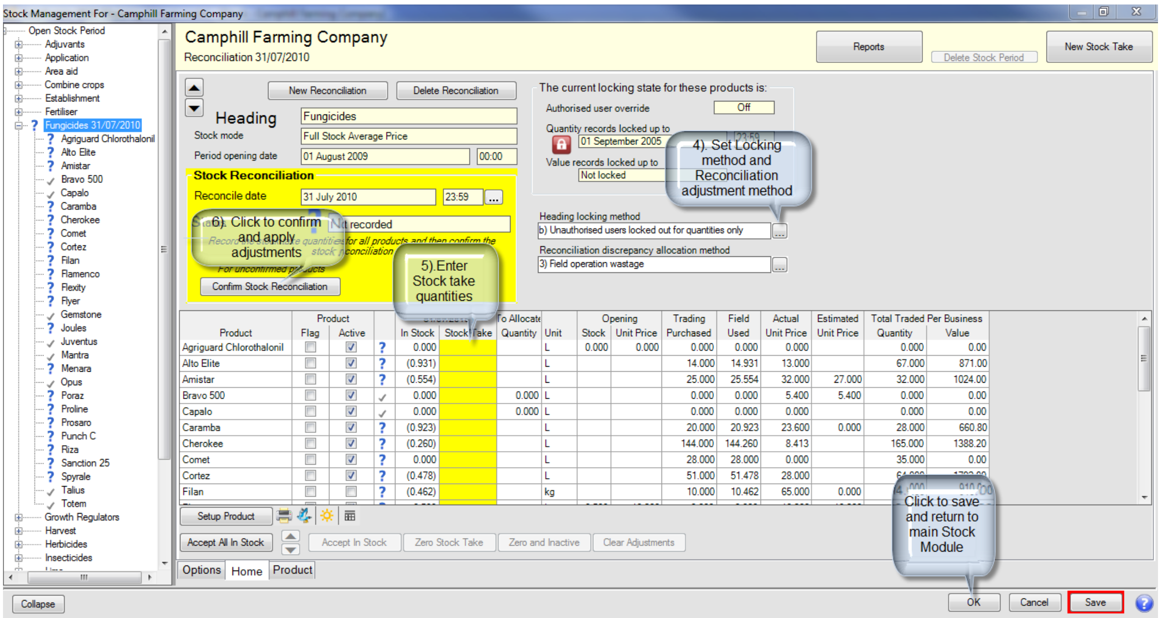
3. Once you have made the appropriate adjustments, check that the adjustment method is what you want and that you have set the appropriate **Heading Locking method**. If you set the Locking Method to Quantities only it will prevent you from inadvertently changing the records at a later date (they can be unlocked again) and more importantly, you must lock for quantities if you are intending to reconcile a heading more than once in the same Stock Period. Click **Confirm Stock Reconciliation** and then **Save**

You can partially complete a reconciliation and come back to it later. Click either **Save** or **OK** to save and return to the main Stock Module. To pick-up and continue the reconciliation, click the appropriate heading in the Stock Module in the Open Period and click **Stock Management**.









Once this heading is complete you can reconcile another heading by selecting it in the tree view and then follow the process from step 2 above.

Reconciliation Discrepancy Allocation Methods

If there is a discrepancy between the figure that Gatekeeper has In Stock and the actual physical quantity of that product in the store, and assuming that the Opening Stock figure for the stock period for that product was correct, then either one or more deliveries have been incorrectly recorded (or not entered at all) in which case this should be rectified in the Trading Module. OR the product has been recorded to the fields incorrectly. If it is the latter and there are application records missing or entered very wrongly, then they should be corrected in either the Recording or Planning Modules. However, if the discrepancy is relatively small and down to an accumulated measuring inaccuracy or rounding over a number of applications, then Gatekeeper can retrospectively adjust the application quantities (or harvested quantities for output types) over the fields on which those products were recorded in the period.

There are 5 Reconciliation discrepancy adjustment methods available to Gatekeeper during a reconciliation. Some are subtle, whilst others can be considered as cruder. It would be fair to say that once your stock is running well, you would normally only expect to use one of the two “rate adjustment methods”.

During a reconciliation, it is quite possible that you will need to use different methods for different products in the same reconciliation. This is fine. Choose the appropriate Discrepancy allocation method and ONLY enter the Stock Take figures next to the products that you want to adjust using that method. Click **Confirm Stock Reconciliation** to make the adjustment. Those products will be adjusted (indicated by a green tick next to them). Now change the method and enter the Stock Take figures for those products to be adjusted by the new method and click **Confirm Stock Reconciliation**. Once all of the products have a green tick the reconciliation is complete.

The Reconciliation discrepancy allocation methods are:

- **Stock Adjustment (no average price implications)** – An adjustment figure (plus or minus) is introduced into the stock ledger to "fudge" the In Stock figure. This can be undone.
- **Trading Adjustment** – An adjustment figure representing a quantity of product purchased or sold at a unit price is introduced to the stock ledger. This can be undone.
- **Field operation wastage** – The accumulated product applied to (or harvested from) fields for the stock period (OR IF LOCKED FOR QUANTITIES when last reconciled), and the accumulated product from the previous reconciliation date within the open stock period up to the current reconciliation date will be adjusted up or down to make the In Stock correct. The rate actually recorded on the field is NOT changed. Instead the adjustment is made to a Field Wastage area. Thus with this method there is no risk of retrospectively infringing a max dose rate for example. This cannot be undone without further reconciliation adjustments.
- **Field operation rate** - The accumulated product applied to (or harvested from) fields for the stock period (OR IF LOCKED FOR QUANTITIES when last reconciled), and the accumulated product from the previous reconciliation date within the open stock period up to the current reconciliation date will be adjusted up or down to make the In Stock correct. In this scenario the field rate IS CHANGED. This cannot be undone without further reconciliation adjustments.
- **Opening stock** – The Opening Stock figure at the beginning of the Open Stock period is adjusted up or down to make the In Stock right. Unless the Opening Stock was incorrect then this method should be considered a "fudge". This cannot be undone without further reconciliation adjustments.

Stock Management and Contract Businesses

Standard Gatekeeper has one Main Business with a single stock entity. Contract businesses can be added and are ideal in a contract farming situation. One of the reasons that you may have Contract Businesses enabled is so that you can manage discreet stock entities rather than just one single one. This means that you can have different prices and stock levels in each main and contract business. However, each stock entity will need to be managed and reconciled to ensure that the stock correctly reflects the on-farm position.

In a multi-stock entity situation (i.e. when one or more contract businesses are enabled) Gatekeeper gives you the opportunity to manage those entities (for the purposes of stock reconciliation) individually or grouped. If you ALWAYS deliver to each main or contract business and NEVER "borrow" from one stock entity to another, then you can manage them separately, in which case all of the previous notes regarding Stock Management apply except that you will need to repeat the process for each stock entity. HOWEVER, if you DO BORROW between stock entities from time to time, then you will almost certainly have to consider the stock entities together when doing a reconciliation. Gatekeeper will offer you the opportunity of doing this when you go to Stock Management in the situation where you have a main and at least one contract business.

In this situation, when you click the Stock Management module option button from the Stock module an additional option window is displayed before you are taken to the Stock Management window. From this window you can choose whether you want to manage the stock in an individual or combined mode. Please note that you can start the reconciliation in one mode and then toggle between modes during the reconciliation. Each time you run into Stock management you will be offered the Business mode selection.

Single business.

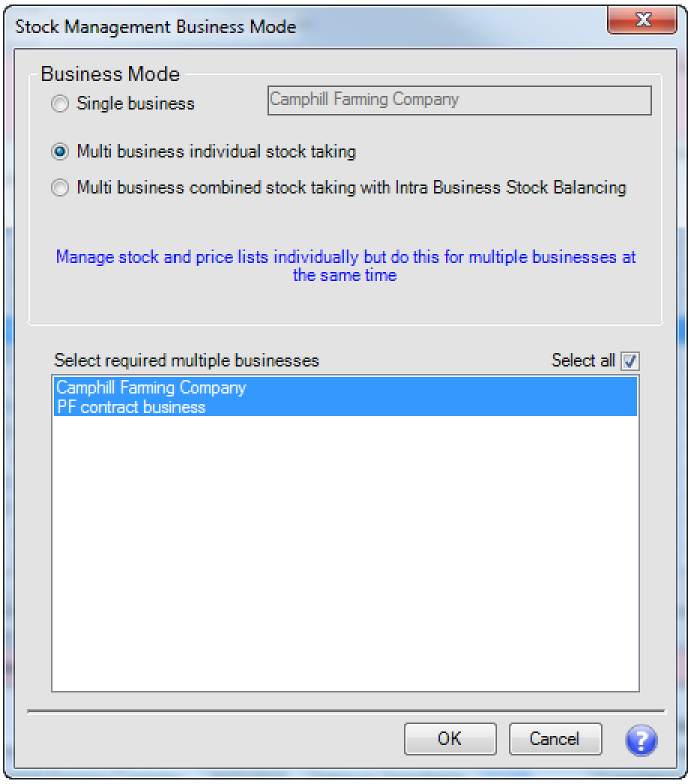
Manage the selected main or contract business stock entity only.

Multi-business individual stock taking.

See stock data for the selected heading for all the selected stock entities, but reconcile each product line separately.

Multi-business combined stock taking with intra-business stock balancing.

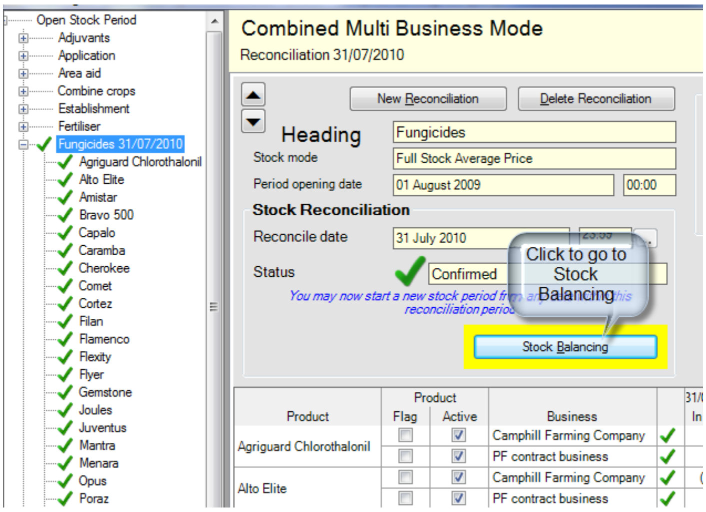
Once the reconciliation is initialised you will see a single In Stock figure for each product which is the balance across all the selected main and contract businesses. You can compare and reconcile that against the total combined on-farm figure for the product across the selected main and contract businesses. The discrepancy is adjusted by either Field Operation Wastage or Field Operation Rate only after which you are automatically taken into the Stock Balancing mode (see over).



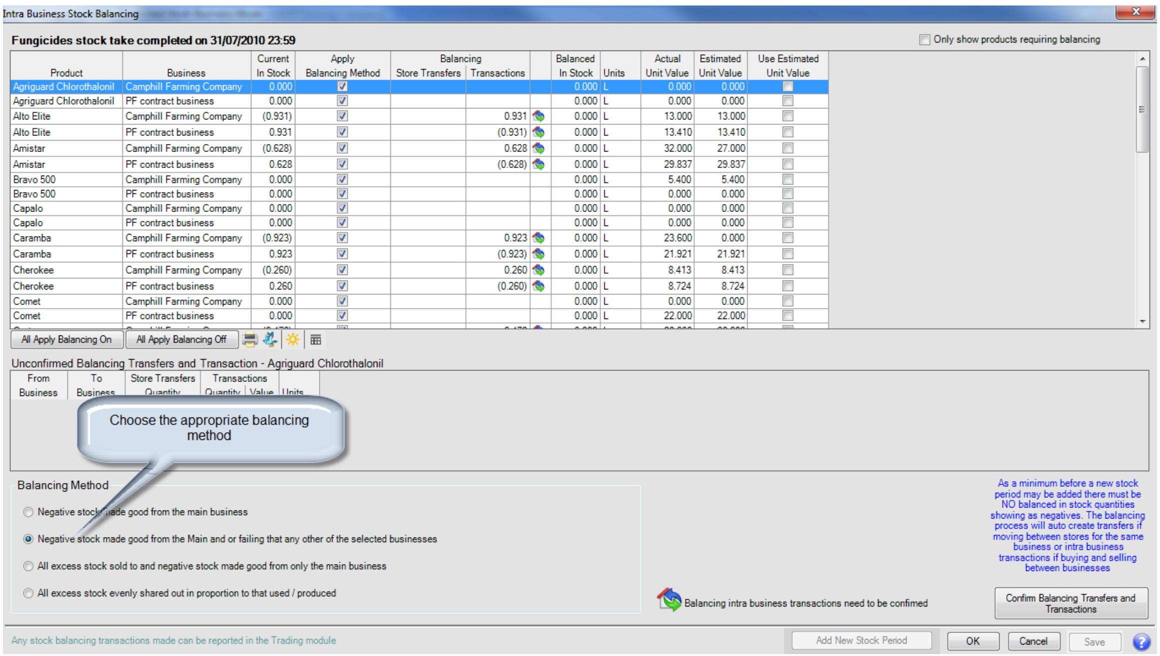
Farmplan gatekeeper

Stock Balancing Mode

If you use the Multi-business combined stock taking with Intra-business stock balancing you will automatically be prompted to enter the Stock Balancing mode. Basically, in this mode, Gatekeeper will generate purchase and sales transactions between the main and contract businesses to make the In Stock figures for each stock entity correct. These transactions can be seen and reported in the



Trading module. The purpose of this process is to make sure that none of the reconciled



products are left with a negative balance. You can choose the most appropriate stock balancing mode to suit your particular business requirements.

Balancing Methods

- **Negative Stock made good from main business –** Gatekeeper will attempt to sell sufficient of each product from the main business to the contract business/s to make their negative quantities zero. This method can only work if there is sufficient product in the main business.

- **Negative stock made good from the main and or failing that any of the other selected businesses –** Similar to above except, if the main business has insufficient product then the shortfall will be made good with transactions from other contract businesses.

- **All excess stock sold to and negative stock made good from only the main business** – Any surplus stock in the contract businesses is sold back to the main business reducing the contract business stock to zero. The main business will sell sufficient to any contract businesses with negative stock to make their stock zero.

- **All excess stock evenly shared out in proportion to that used/produced** – Any excess stock is shared between all the selected businesses in proportion to that used/produced.

Once the stock has been balanced you MAY initialise a new Stock period if you wish but this is not essential. If not click **OK** to return to the Stock Management window and **OK** again to return to the main Stock module.

Farmplan gatekeeper

Starting a New Stock Period

The Stock Period is managed by you the user in that you need to close stock periods (and in the process create a new open period) for each stock heading. The reason that you need stock periods is really twofold. Firstly pricing is averaged within each stock period allowing you to have the “price for the season” reflected in the field records and secondly so that you can effectively keep your stock reconciled with the on-farm levels isolating changes within defined stock periods.

Earlier in this chapter the stock period was defined thus.... *A Stock Period is defined by a start and end date. At the start date there is an opening stock quantity and value. All deliveries up to the end date are added to the stock quantity. The delivery price is taken into account to create an average unit value for each product in the period. All field applications are taken from stock and it is the application date which defines which stock period that application will affect and thus where the price will come from (depending on the stock method chosen). Normally, a stock period is started at the beginning of the crop season and is finished to coincide with the end of the season. Typically, for an arable farm, the input stock period should start on the 1st August and end on the 31st July in the following year. So it captures all of the inputs (by date) from establishment through to pre-harvest. The **OUTPUT** stock period needs to capture the period from the harvest date of the crop through to the date when the crop was sold (delivered) off the farm.*

You won’t be able to start a new Stock Period for a heading until you have done a Stock Reconciliation (see earlier in this chapter). When you click **Confirm Stock Reconciliation**, the **Add New Stock Period** button appears, highlighted in yellow. Clicking this button takes you to the ‘Add New Stock Period’ window (see below).

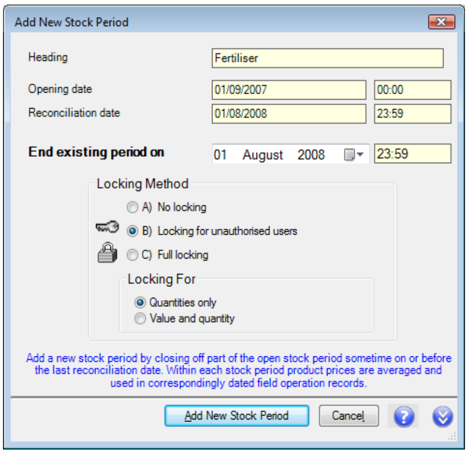
The END Date for the stock period is important and should be chosen to fit in with your crop season. Normally you will use the same end date for all your stock headings of input type unless there is an over-riding reason to do otherwise. It is likely that the end date for your output type headings will be different than that of your input heading types and indeed if you grow arable and root crops then the end date is likely to be different for each of these.

To End a Stock Period

1. First do a stock reconciliation. After which the **Add new stock period** button will be available.

The end date will automatically be the last reconciliation date. Choose the Locking method and type (see locking below).

2. Click **Add new stock period**.



Locking:
When you end a stock period you can elect to lock data. If you do so it will prevent you from inadvertently changing records (delivery and field operations) prior to the end date. Even if you do lock records, they can be unlocked by an authorised user.

Locking options:

- No locking – data remains unlocked and may be edited by any user.
- Locking for unauthorised users – unless a user is authorised, they will not be able to change records prior to the End date. The authorisation is defined by user permissions (**Tools ► Authorisation manager**).
- Full locking – all users are prevented from editing records prior to the End date

Locking for options:

- Quantities only – values can be edited in invoices for example but not quantities.
- Value and quantity – neither may be edited (depending on the locking option) prior to the End date.

Price List Type Headings

For this type of heading (for example Fixed cost cultivation types) it is not necessary to reconcile prior to ending a Stock period. However, it is necessary to define stock periods to isolate prices to a season. Stock periods are ended as above but without the need to reconcile first. Before ending the stock period for these types check that the **Actual unit price** is correct as this is the price that will be used in the field records for this period. Once you have ended the period you can edit the prices for the New Open period.

Ending Stock Periods and Contract Businesses

Managing Stock periods is exactly the same for contract businesses EXCEPT – If you are in the Multi-business combined stock taking mode. In which case you need to go to Stock Balancing and click the **Add New Stock Period** button.

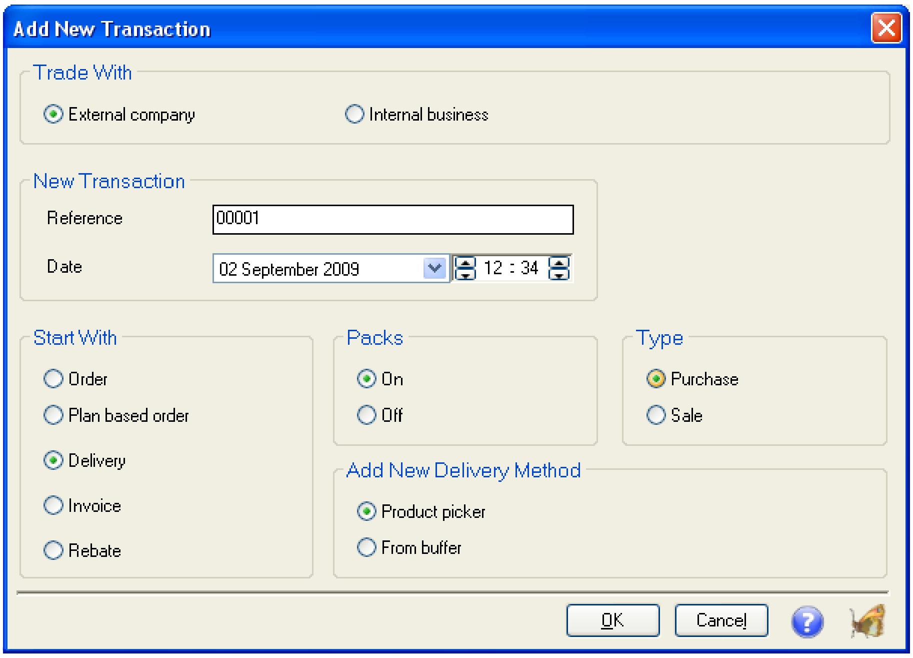
Trading Module

This module allows you to record sales and purchases of products. A transaction is a term used to describe an entry into the Trading Module, whether this records an order (or a contract), a delivery (or goods leaving the farm) or an invoice (or a combination of all three). Rebates are also recorded here.

The Main Grid shows the details of the transaction(s) highlighted in the tree view. The tree view can be ordered by month of transaction, the type (whether sale or purchase) and the status of the transaction (draft order, completed deliveries, etc.).

When adding a new Transaction in the Trading Module it is completely up to you how much detail you record. For example you might want to enter the details of the products ordered, then record the product/s delivered against this and finally record the invoice details. OR you might well decide that you only want to begin recording the transaction once you have the invoice in hand, in which case you can start the transaction by entering the invoice details and it will automatically create a corresponding delivery (in this scenario an Order is not necessary).

The Add New Transaction Window



Trade With – Gives you the option of trading with an external company i.e. a supplier or purchaser or (only if you have Contract Businesses enabled) an internal business i.e. one of the contract or main businesses.

New Transaction – The reference automatically increments on from the last one, but can be overwritten. If you are starting the Transaction at the Invoice (see Start With) enter the Invoice number which will be used as the Transaction number and the Invoice number. The Transaction Date is automatically the current date for the first Transaction entered in a session, but this can be edited. The date is used in the following way: The year is what tells Gatekeeper where in the Transaction main window tree view to "hang" the Transaction. Also the Transaction Date will automatically be used as the Order/Delivery/Invoice date (depending on the Start With option) but again this can be edited.

Start With – This tells Gatekeeper where in the transaction you want to begin. If you want to use the full order process then you should start with an Order. If you want to wait to enter the transaction until you have the invoice then start at the Invoice.

Packs – If you want to record packs delivered by pack size and cost, set to On. If you want to enter the number of units (litres, Kg's etc) delivered and their cost, set to Off.

Type – Purchase if you are buying and Sale if you are selling.

Add New Delivery Method – Choose Product picker if you know the stock list product/s being bought/sold. Only use the From buffer option when you have previously used the Add Buffer module option from the main Transaction module window and now want to move that buffer delivery to this specific transaction. (The Add Buffer option is used when you need to record a delivery off the farm e.g. a load or two of wheat have been dispatched, but you are unsure of the specific contract to which they belong and are waiting for the self billed invoice to arrive so that you can allocate the loads to the appropriate Transaction).

Adding Transactions

1. Click **Add Transaction** (first Module Option). The window that is displayed will remember the options which you used last time in the context of Type, Packs, Add

New Delivery Method and Start with option – see above for a summary of each option.

2. You can choose your own reference for the whole transaction, or just use the default number.

3. Decide where you want to begin recording the transaction; perhaps you wish to start with an order, or else just record the invoice in which case the delivery will be added automatically.

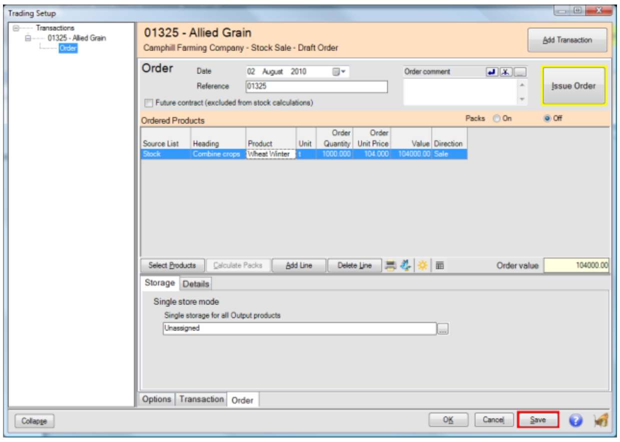
   NB: Choosing 'Plan based order' and clicking **OK** will take you to the 'Plan Selector' window. This will contain a list of issued Work Plans added in the **Planning Module** (see page 60). You can order the products required for one or more plans from here.

4. Choose to record a Purchase or Sale. Click **OK**.

5.
   a. Without contract business - The 'Select Supplier' window lists the Stock Companies you trade with (if you need to add a new Company click **Setup Company**). Select the supplier or buyer and click **OK**. Continue from step 6.
   b. With contract business(es) - the 'select purchaser or supplier' window will appear. This is for the internal business's stock centre i.e. Main business or contact business. Select the purchaser or buyer and click **OK**.

6. Select the product(s) you require in the 'Product Selector' window (you can type the first few letters of the product name in the search field rather than scrolling through the list) and use the blue arrow to move them into the right hand box. Add the quantity of each product and click **OK**. If you don't want to choose the products in the product selector but would prefer to add product lines directly into the invoice or delivery grid, click **Cancel** to close the product selector and then use the "**Add Line**" button in the invoice or delivery grid and enter the product details in the appropriate cell. Clicking **Enter/Return** will move the cursor along the row. Clicking **Enter/Return** in the last cell of the row will create a new line. Alternatively you can click "**Add Line**". Pack sizes can be created "on the fly" simply by typing the pack size. Also in this mode the same product may be added on more than one line (for example where a product appears in an invoice/delivery with multiple pack sizes or where it is listed in an invoice more than once).

7. Depending on where you started in the transaction process (i.e. Order, Delivery or Invoice), the following 'Trading Setup' window will either show you the draft order (see right), a delivery note or an invoice. Fill in the details as appropriate. Click **Save.**



NB: If you have started with an order, you now need to click on the yellow-ringed **Issue Order** box (see above). This will issue the order (rather than it just being a draft order) and you can now print out a copy of the order (via **Reports** - highlight the order in the tree view first) to send off to the company. Another option is to use the 'future contract' tick box. This will exclude the order from stock calculations when planning ahead or for harvest contracts.

Editing Transactions

Depending on the Transaction type and where you began the Transaction, it is quite likely that you will need to return to the Transaction to add new components. For example, if you set up a Sale type Transaction beginning with an Order because you are selling some wheat, when some deliveries off the farm take place which relate to that Transaction, you will need to find the Transaction and edit it, adding the details of the deliveries. Later on when the payment arrives, you will edit the Transaction again to add the invoice details. If at a later date you wish to add a delivery and/or an invoice to an issued order, or invoice/s to a delivery/s you need to:

1. Highlight the company in the tree view, followed by the transaction in the right hand window and click **Edit Transaction** (the second Module Option). This takes you into the 'Trading Setup' window where you can highlight whichever stage you wish to add in the tree view (either delivery or invoice).

2. If you choose to add a delivery, the completed delivery note will be shown which assumes that the delivery included everything in the order, if this is not the case, you

can amend the details. You can have many deliveries to fulfil an order (typically for marketing outputs).

NB: If there are outstanding products, fill in the 'Delivery Quantity' column and press **Enter/Return** and the 'Outstanding Quantity' column will be automatically filled. Untick the 'Completed Delivery' box and click **Save**. When the remainder is delivered, return to the delivery note and click **Add Delivery** and another delivery note will be issued for the remaining amount.

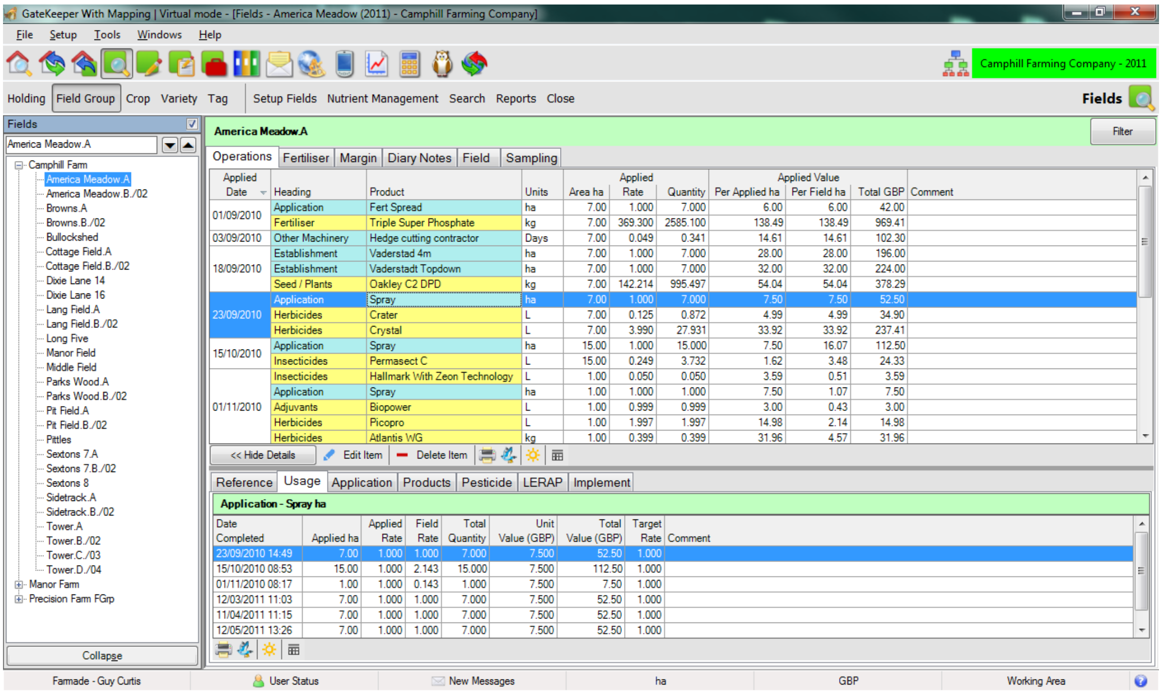
NB: Once a delivery is complete, the 'In Stock' quantity for the product will be adjusted in the Stock Module, but the unit price won't be, until an invoice is added.

3. If you choose to add an invoice, the 'Delivery Selector' window will appear. Choose the product(s) included in the invoice and fill in the 'Value' column for each product. If you are entering a payment invoice for Output loads you may well click several loads relating to this invoice, in which case, having selected the loads, adjust their weights to match the weighbridge weight for each load and then enter the total payment value (this is the amount that you will actually be paid net of any deductions) for all the loads by ticking the "selected deliveries price calculation" check box and then entering the figure in "Total value", and click **OK** (NB: if you are going straight from order to invoice, a delivery will be created automatically from the invoice quantity details). Once into the Invoice, you can edit any information you wish, then click **Save**.

   NB: Once the invoice is complete, the Unit Price for the products will be adjusted in the **Stock Module** and the field prices will be automatically updated to reflect the current stock period price.

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 detail 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,

- Click **Show Details** to view more details about the highlighted operation.

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. N.B: 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**.

   N.B. 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**.

3. 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 a 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 the 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 warnings.

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.

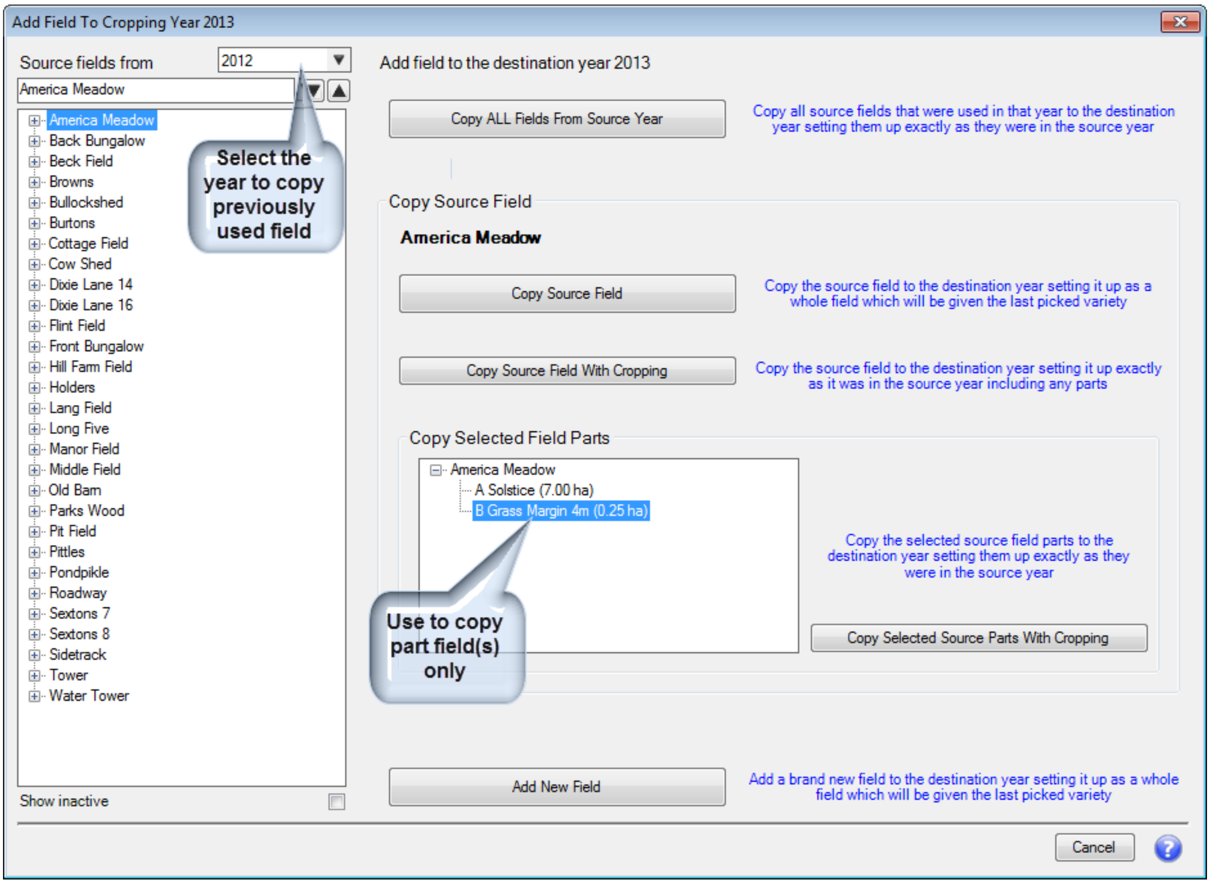
3. The 'Add Field to Cropping Year 20??' window will appear (see over). Choose from one of the following four options -
   a. To <u>copy all fields exactly</u> as they are in a previous year:
      i. Use the 'Source field from' dropdown box at the top of the window (above the tree view) to select the cropping year you wish to copy all fields from.
      ii. Click the **Copy ALL Unused Fields From Source Year** button.

   b. 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. To copy the field and ALL of its splits 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. 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) under the field within the 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.



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

2. Click **Next Field button** (bottom right corner) to display the 'Add New Field' window again. You will see that the field list reduces as the cropping is allocated.

   N.B: 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. DONT 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.

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.

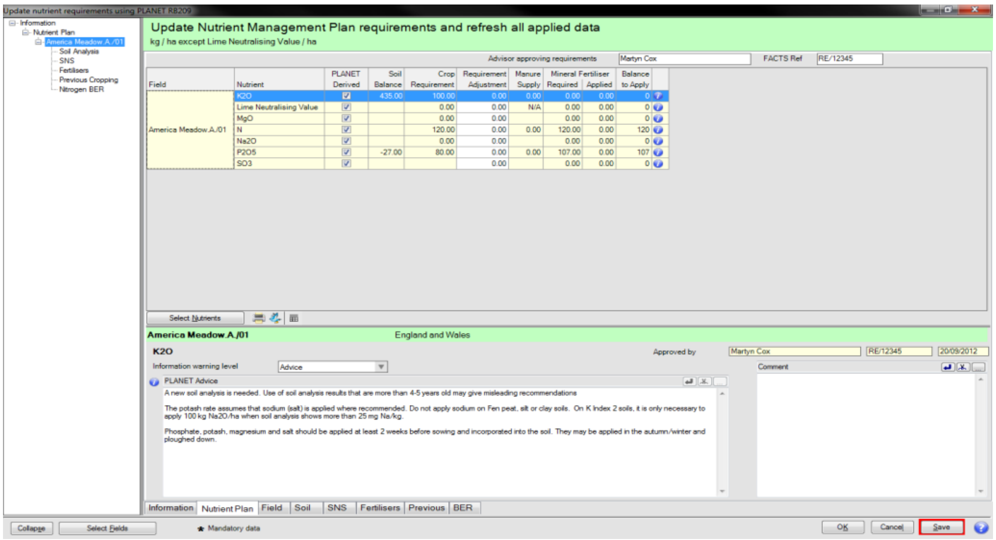
Nutrient Management

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 to 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:

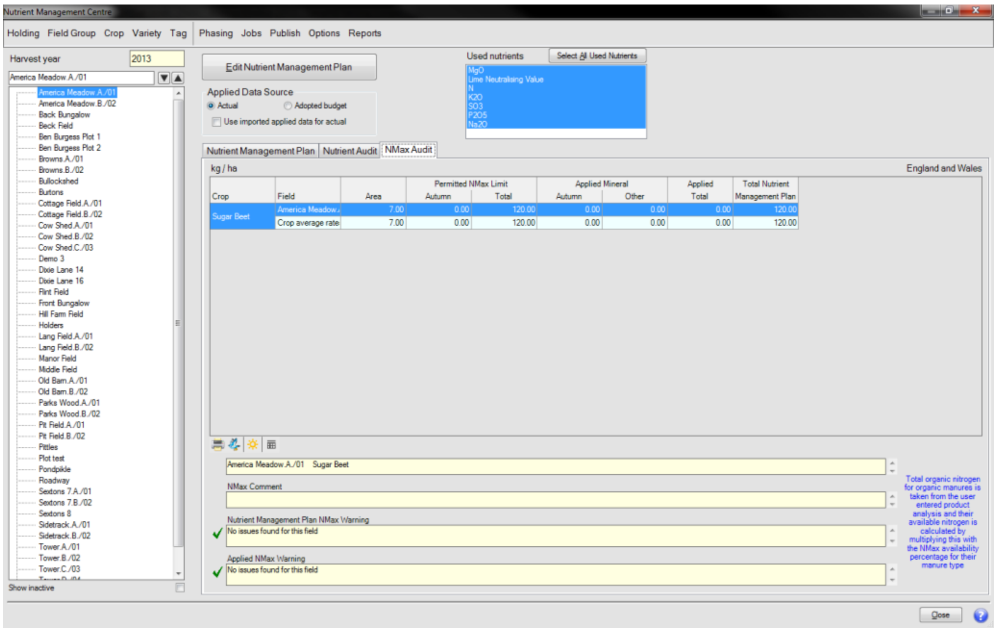
1. Click **Nutrient Management** (second module option) and the 'Nutrient Management Centre' will appear. Choose the field(s) that you want to include in the Nutrient Plan by selecting them in the tree view.
2. Click the **Edit Nutrient Management Plan** button and the 'Nutrient Management Plan Update' 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**. NOTE: 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**.
4. 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.

5. 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 below 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).



Nutrient Management Centre
Holding Field Group Crop Variety Tag Phasing Jobs Publish Options Reports
Harvest year 2013
America Meadow.A./01
Edit Nutrient Management Plan
Applied Data Source
Actual
Adopted budget
Use imported applied data for actual
Used nutrients
Select All Used Nutrients
MgO
Lime Neutralising Value
N
K2O
SO3
P2O5
Na2O
Nutrient Management Plan
Nutrient Audit
NMax Audit
kg / ha
England and Wales
Crop
Field
Area
Permitted NMax Limit
Autumn
Total
Applied Mineral
Autumn
Other
Applied Total
Total Nutrient Management Plan
Sugar Beet
America Meadow.
Crop average rate
7.00
0.00
120.00
America Meadow.A./01 Sugar Beet
NMax Comment
Nutrient Management Plan NMax Warning
No issues found for this field
Applied NMax Warning
No issues found for this field
Total organic nitrogen for organic manures is taken from the user entered product analysis and their available nitrogen is calculated by multiplying this with the NMax availability percentage for their manure type
Show inactive
Close

Recording Module

You add new field and store treatment records to Gatekeeper via either the Recording or Planning modules. 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 Work Plan.

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)
- **Storage Contents Operations** – Used to record treatments and operations to crop in-store
- **Storage Diary Note** – Used to add diary notes to stores
- **Store Fabric Operations** – Used to record treatments to the store itself i.e. fumigation.

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 the 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 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, until all your field records are up-to-date.

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

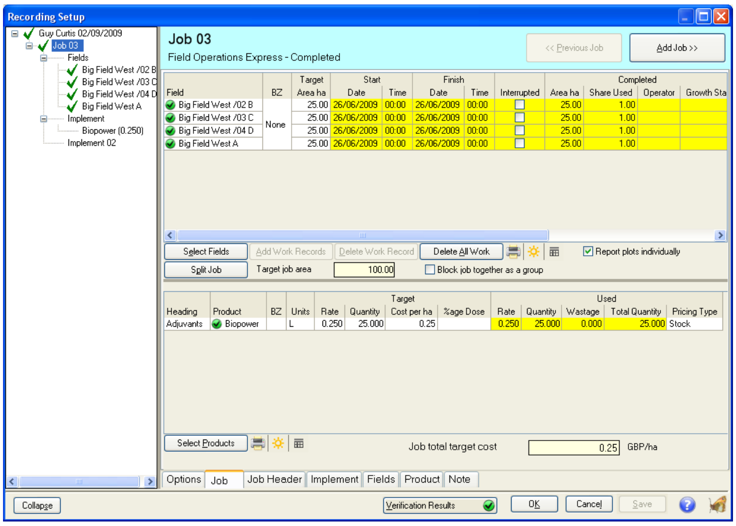
1. Click **Add Job** (first module option).

2. In the 'Add New Job' window, choose 'Field Operations' from the drop-down list and click **Add Field Operations Job**.
3. 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.

4. Select the field(s) you wish to add records to in the 'Field Selector' window.

5. 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**.



6. Fill in the yellow cells in the ‘Recording Setup’ window (see right) 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.

   NB: The column labelled “Pricing Type” allows the user to override the price of a product (as determined by the pricing method allocated to that heading) by using the “Job Stored” pricing method. To override simply double click in the “Pricing Type” column and change the type from “stock” to “Job”. In the “Unit Price or Total Value” (which will appear next to “Pricing Type” column) enter the price for the product.

7. 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.

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

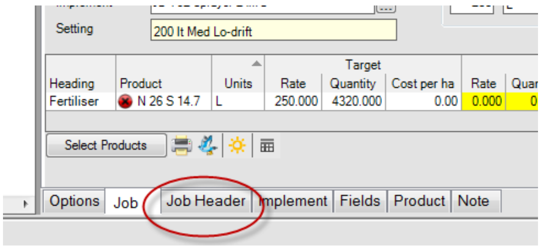
N.B: If you wish to repeat a job, choose the job type and then the ‘Copying from the selected job’ option in the ‘Add New Job’ window and highlight the job to be copied in the tree view. Click **Copy Field Operations Job (**or **Copy Plan** if you are in the Planning Module).

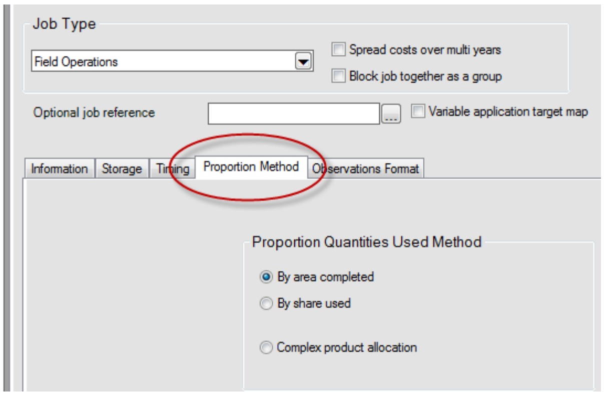
You can edit any job at a later date by using the **Edit Job** module option.

Complex and Share Used proportioning methods

In a Recording or Planning 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.

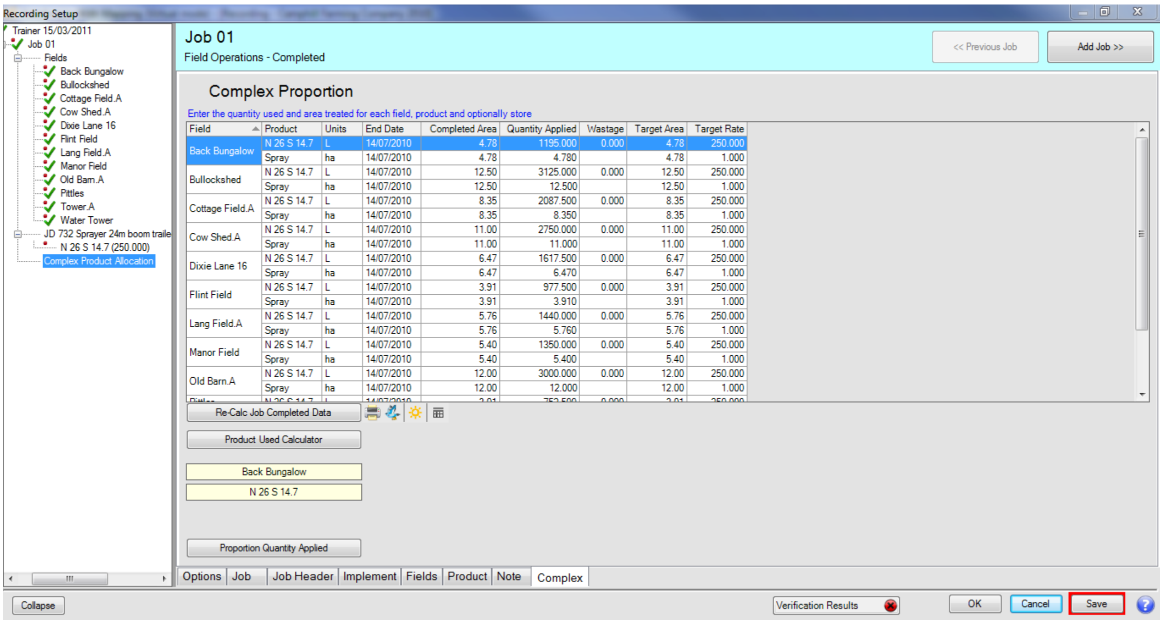
Unless otherwise specified products will always be apportioned on the basis of area. To use either Share used or Complex methods, first create the Job as normal selecting the Job type, fields and products. In the Recording Setup window click the **Job Header** tab and then the **Proportion Method** tab.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





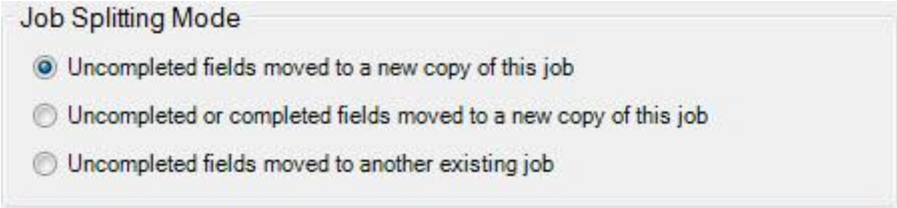
Share Used – Use this method if you have changed calibration part way through a job between fields and have therefore used different application rates on fields within the same job. You can enter the approximate amount of material (or mix in the case of a spray operation) against each field and the actual 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 dates and any other details against each field in the **Job** tab and then click the **Complex** tab. In the grid 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 Planning 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 the three options available.


Job Splitting Mode
Uncompleted fields moved to a new copy of this job
Uncompleted or completed fields moved to a new copy of this job
Uncompleted fields moved to another existing job

Planning Module

You add new field and store treatment records to Gatekeeper via either the Recording or Planning modules. The Planning module takes you through a process in which you create a Work Plan shortly before you intend to carry out an operation (for example a round of spraying). It only takes a few minutes to create a Work Plan and having created it you can print out instructions for your operator (or yourself) complete with product requirements and tank fill instructions (if you want). As you complete the work plan you (or your operator) can fill in the work completed details (date, weather, quantities used etc) on the work sheet providing a convenient way of capturing these details which can be entered as work completed records to the computer later. A major benefit of the work plan is that these details can be entered by a secretary who simply transposes the details from the work sheet to the appropriate work completed records on the corresponding Work Plan on the PC.

Work Plans are very useful for any field work when applying product, e.g. planting, fertilising, spraying and also harvest operations providing a convenient way to capture harvest data and quantity of crop harvested. As you create a work plan, it will be verified against SentinelActive crop approvals (optional) and also against Nmax and RB209 (in the case of fertiliser applications), giving you an extra check to help prevent mistakes.

You can import recommendations created by your agronomist which become draft Gatekeeper Work Plans. This saves you time and reduces your data inputting.

Note: Please read through the previous Recording section in this guide because, although Planning and Recording are separate processes, they share the Job type structure and thus the Job types and other comments are equally relevant to building and confirming Planning Module Jobs.

Creating a Work Plan

A Work Plan is relevant to a specific round of field operations. For example, drilling, fertilising and spraying. Each plan is normally created within a few days before the intended activity. The Plan carries one or more Jobs, each Job containing one or more fields which are to be treated with the same products and rates. This is not to say that a Work Plan restricts flexibility. Part plans or Jobs can be completed, you can deviate from or change the plan and there is a great deal of flexibility when you come to confirm work completed.

The process to create a Work Plan is as follows:

Create Work Plan or import Agronomist

Carry out work and fill in work sheet.

Work sheet returned to office and computer

Adding a Plan

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

2. In the 'Planning Setup' window, give your plan a reference or name and, if you require Sentinel verification, choose the 'On fully' button in the 'Product Verification' box. If you require a LERAP Assessment tick the box 'Make an on-going LERAP assessment'. Fill in any other details as required. Click **Add Job >>** (top right).

3. In the 'Add New Job' window, choose your job type from the drop-down list (refer to Recording section for description of Job types) - in the case of spraying use 'Field Operations'. Click **Add Field Operations Job**. Remember that a 'job' is defined as a field, or a group of fields, which have been treated with the same product(s) at the same rate(s) (unless using complex or share used proportioning methods).

4. Choose the field(s) you are planning to work on in the 'Field Selector' window. Click **OK**.

5. In the 'Product Selector' window, select the products(s) you are planning to use. Click **OK**.

6. Within the 'Planning Setup' window you will see the results of the product verification (if enabled) next to the product(s) being used – a green tick indicates a pass, 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).

7. Also within the ‘Planning Setup’ window is the ‘**Implement**’ tab (middle bottom), click on this to fill in the implement width and tick the ‘Provide Sprayer Setting’ box to provide information, if required, such as tank mix volume rate and LERAP star rating.
8. NB: You can set up each implement setting to carry an Associated Machinery Cost (see Setup Implements and Settings in the embedded help), in which case this will be automatically added when you record the completed work.

9. Add any notes to the Job Header, Product, or Field tabs.

10. Add additional Jobs for the Plan by clicking “Add Job”.

11. When you have added all of the Plan details, click **OK** to save the plan and return to the main Planning module.

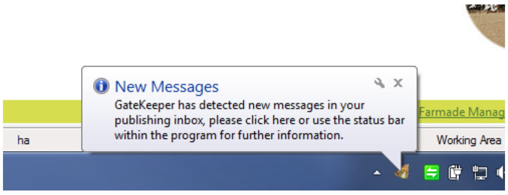
12. You will be taken back to the main Planning window and your draft plan will appear in the tree view and in the main window. If you have more than one plan in the tree view you can move between them by highlighting the Work Plan you want to work with within the tree view.

You can edit and change Work Plans at any time; just select the plan in the main tree view and click **Edit Plan** (second Module Option).

OR Importing an Agronomist Recommendation

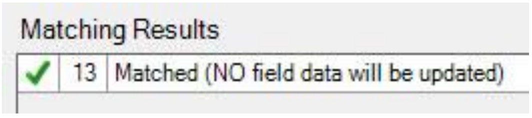
If your agronomist is using Gatekeeper:

1. Send your publishing Key to your Agronomist and make sure that your fields and your agronomists fields are setup the same (export your cropping to your agronomist, (see following section – Publishing page 67)).
2. Your agronomist builds and Publishes the recommendation to you via synchronisation. When you synchronise, Gatekeeper will automatically check for new publications which will be downloaded to your Publishing Centre and notify you that you have new Publications.



3. Check your Publishing Centre Inbox, highlight the recommendation and click **Import Published Data**.

4. Within the 'Import Published data' window, select the 'Do NOT change field and cropping data' options (see blue text for full detail) and check the Gatekeeper destination is for the correct business. Click **Import Data.**
5. Within the 'Match Publication Fields Pre Importing' window ensure the matching results says 'Matched (NO field data will be updated)' as shown in the image on right and click **Import.**

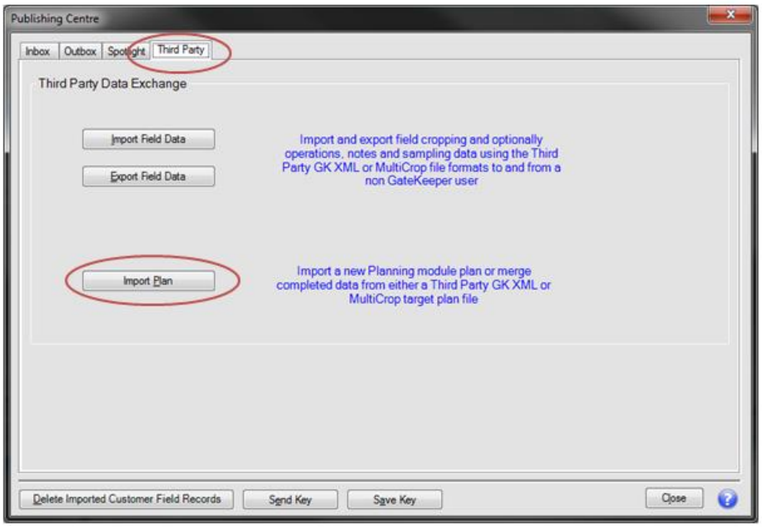


   NB: If all the fields do not match, you can use the 'Update field cropping data only' option on the previous screen to match the field/cropping manually. It is recommended that in this instance your fields be published to your agronomist to ensure your data matches.

6. The recommendation will be imported into the Planning Module as a draft Work Plan.
7. Check the details, select the appropriate operator, machine and setting (if appropriate).
8. **Issue** and print the Work Plan.

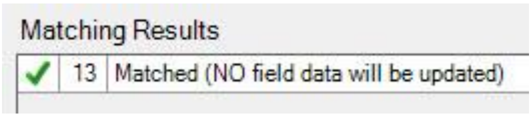
If your agronomist is using another compatible software package:

1. Make sure that your field names and cropping match exactly with your agronomist setup. You can publish your field list to your agronomist via **Publishing►Third Party tab►Export Field Data** to ensure this.
2. If your agronomist has emailed you the recommendation as an attachment. Download the attachment into a folder on your PC and remember the folder location.
3. Go to the Publishing Centre and click the **Third Party** tab.
4. Click **Import Plan**. Choose the appropriate File format (either MultiCrop or Third Party for all others) and browse to the folder containing the agronomist recommendation file.



5. Click **Import**.
6. Within the 'Import Published data' window, select the 'Do NOT change field and cropping data' options (see blue text for full detail) and check the Gatekeeper destination is for the correct business. Click **Import Data.**

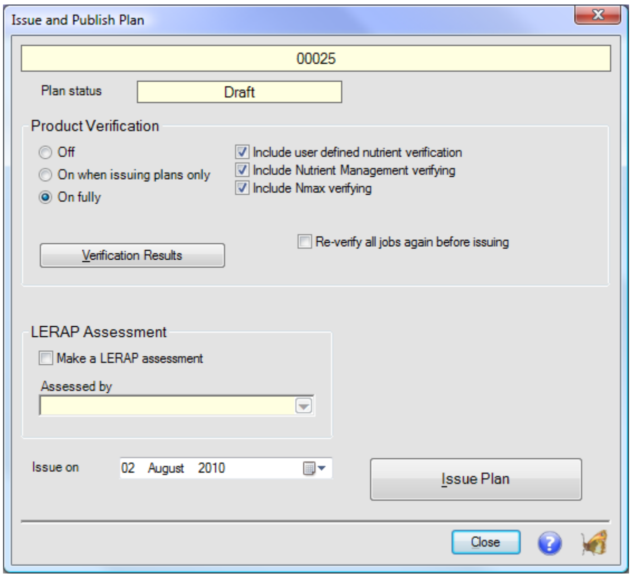
   NB: If all the fields do not match, you can use the 'Update field cropping data only' option on the previous screen to match the field/cropping manually. It is recommended that in this instance your fields be published to your agronomist to ensure your data matches.



7. Within the 'Match Publication Fields Pre Importing' window, ensure the matching results says 'Matched (NO field data will be updated)' as shown in the image on right and click **Import.**
8. The file will be imported into the Planning module as a draft Work Plan.

Issuing a Plan

Before a Work Plan can be printed out or transferred to a device (like Gatekeeper Web Apps, Mobile or an on-board controller), it has to be issued.

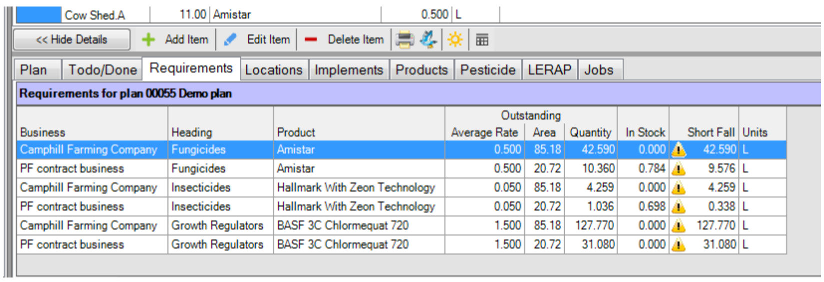


1. Highlight the plan in the main tree view and click **Issue Plan** (third Module Option).

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

3. The plan status will then change from 'Draft' to 'Issued' If you wish to print out a copy of the plan to give to the operator, click **Plan Reports** and select 'Work Plan (Field)' or 'Work Plan (Field) – Landscape' in the following window and tick any options you require. Click **Run Report** and print out the report.

Once a plan is classed as 'Issued', you can also create a 'Plan Based Order' in the Trading Module, whereby the product(s) required in the plan are built into an Order, which can be sent off to your supplier (see page 40).



If you just need to see the total products required for all of the jobs in the selected plan. In the main Plan module window, click the "Show details" button (bottom left corner) and choose the "Requirements" tab.

Recording Work Done

Once all or part of the Plan is completed you can update the plan with the completed records. As you do this the field, stock and operator records will be updated as appropriate.

1. Select the plan you wish to work with in the tree view and click the **Work Done** module option.

2. In the 'Planning Record Work Done' window you need to record the work done details in the yellow cells. Record the dates, times and weather details to each field first and then the total quantity of product. Use the tree view to navigate between and within jobs.

   NB: If you haven't completed the whole planned job you can fill in some details and come back to it at a later date. Outstanding work in a plan is indicated in the tree view by blue question marks and the plan will be listed under 'Started' in the main tree view. You can also delete a field work record or remove a field from the plan by using the **Delete Work Record** or **Select Fields** buttons (mid screen), respectively. If you have treated some fields differently (e.g. different product rate(s)), you can use the **Split Job** button when you come to record work done. This will allow you to break an existing job into separate jobs. This provides a great deal of flexibility within the Planning module. Also you can elect to use the Complex or Share used proportioning methods (see detailed on-screen help for details and also Recording section page 54).

3. Once all the work is recorded in a Work Plan, it's listed as 'Completed' in the main tree view and indicated with green tick marks in the main window.

Farmplan gatekeeper

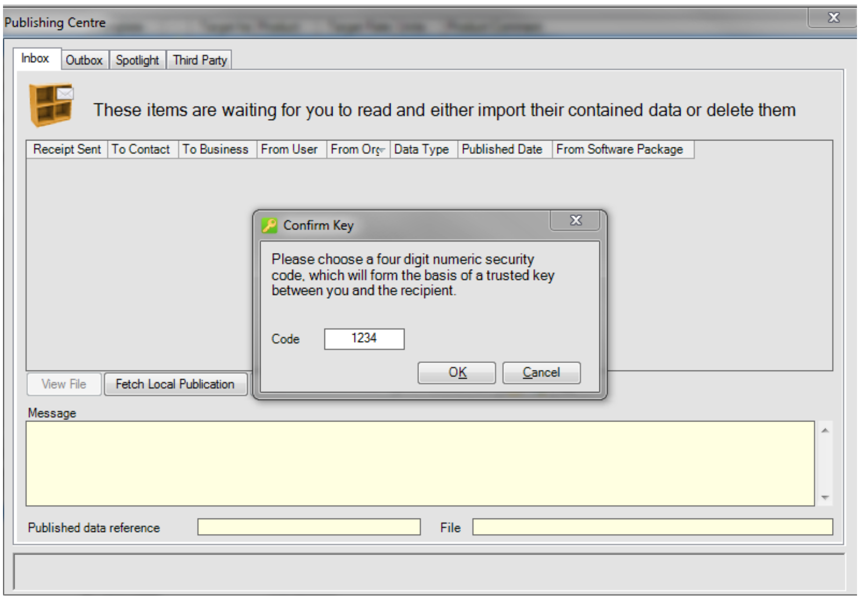
Publishing Module

This module allows you to send and receive data during the synchronisation process. You will receive recommendations from your agronomist in your Inbox (which will appear as ‘Drafts’ in the Planning module when downloaded), or you will send field records or field cropping to your agronomist, which will remain in your Outbox until synchronisation. You may also want to send data to different locations and businesses.

However, you will only be able to send data to, and receive data from, other parties you have swapped ‘Keys’ with. This security feature will ensure that the data publication will end up at its intended destination only. 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 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 (see above).

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, so please make a note of it. Click **OK.**
2. In the 'Add New Publication' window, choose your recipient using the selector 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, tick the 'Send a copy to 'me'' box. This will forward you 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

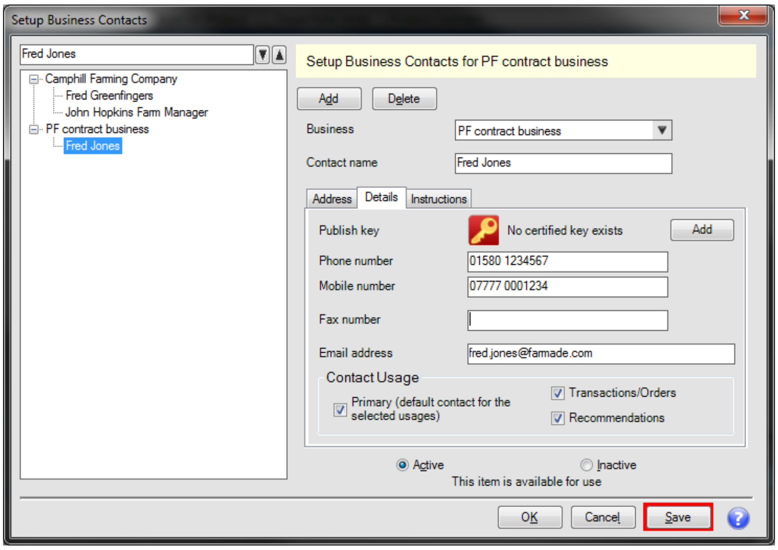
1. Click **Save Key** and within the 'Save Gatekeeper key file' window, browse for the location of your memory stick, then click **Save**.
2. You will be prompted for a four-digit code, which is the 'unlock' code for the Key and is needed by the recipient, so please make a note of it. Click **OK**. Your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

Receiving a Contact's Key

Depending on which method you chose, the Key will either arrive as an email attachment, or as a file on a memory stick. Follow the instructions below for the appropriate method, <u>BUT</u> 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 cropping' ► OK. This step only needs to be done once.

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

3. Click the Publish Field Records.

4. In the 'Add New Publication' window, choose 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.

5. 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 Work Plans or Recommendations), 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 'Import Published Data' window, select the relevant options and click "**Import Data**". At the warning message, click **Yes**. The imported data (if Work Plans or Recommendations) will be seen as 'Drafts' in the Planning Module.

N.B. 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 if your agronomist is 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 agronomist 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.

- **Agronomist recommendation plans** – As long as your agronomist is using a Gatekeeper compatible package then you should be able to import recommendations from them straight into your Gatekeeper. This is great as it reduces your data inputting and prevents mistakes etc.

- **Field operations** – You can send completed operation records to your agronomist if you wish so that they can see what you have actually done compared with what they recommended.

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

- **Import Field data** – use to import cropping from your agronomist (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.

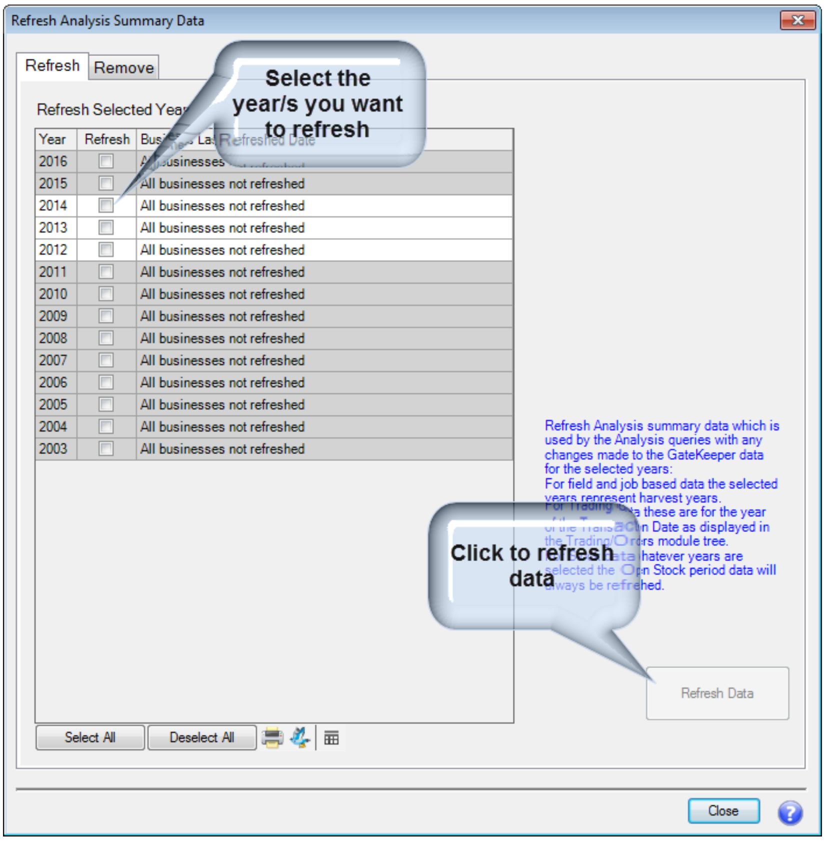
- **Import Plan** – use to import a third party recommendation.

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.

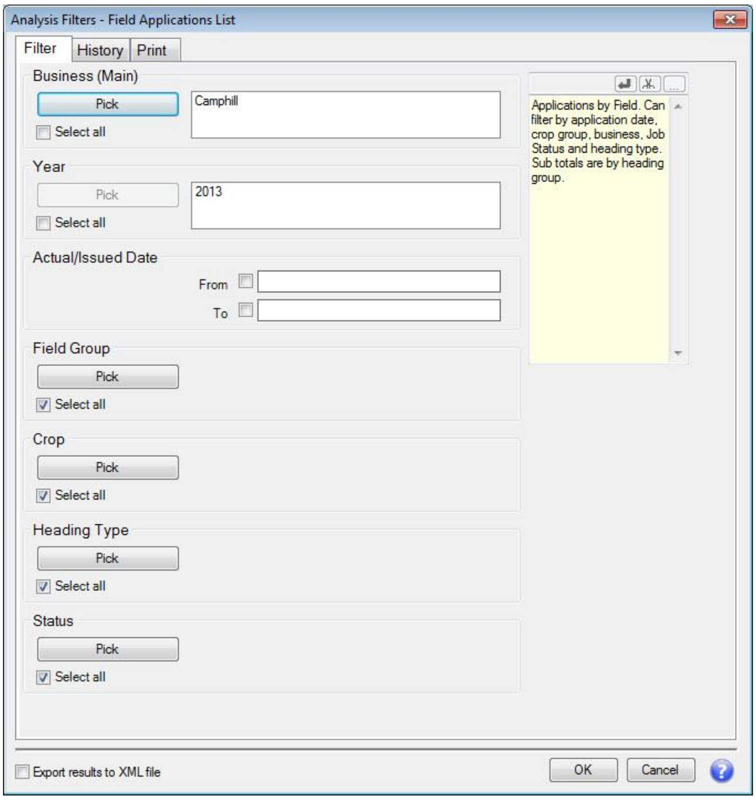


2. Select as many years as you need to be refreshed and click **Refresh Data**. Note: If you change data elsewhere in Gatekeeper it will NOT be reflected in the Analysis Module until you run the Update process. Once the refreshing process is complete, click **Close**.

3. Either click **OK** to run the report with the default filters (see over page) 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

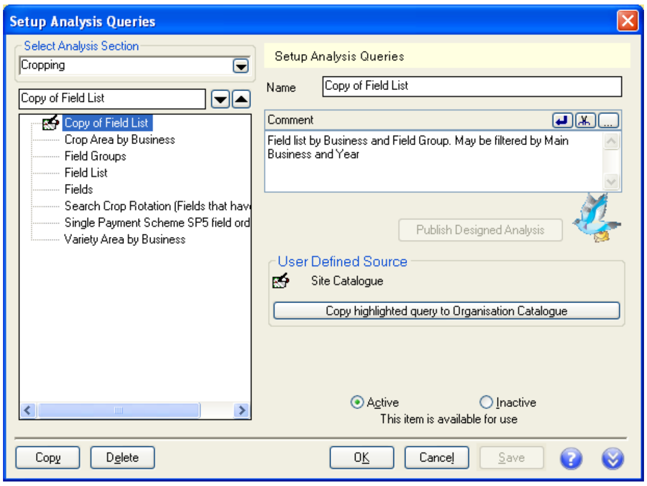
Specify start and end date boundaries for the report. Once you have made all your selections you will be able to click **OK** and the report will be displayed in the main Analysis window.

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**.

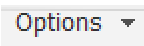
3. Once the report is shown in the main Analysis window, click **Options** (first module option) and then the '**Options**' tab. Tick and/or untick boxes from the 'Visible' column to make up your report. Click **OK** and pass through the 'Analysis Filters' window again. Click **OK,** and your new report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

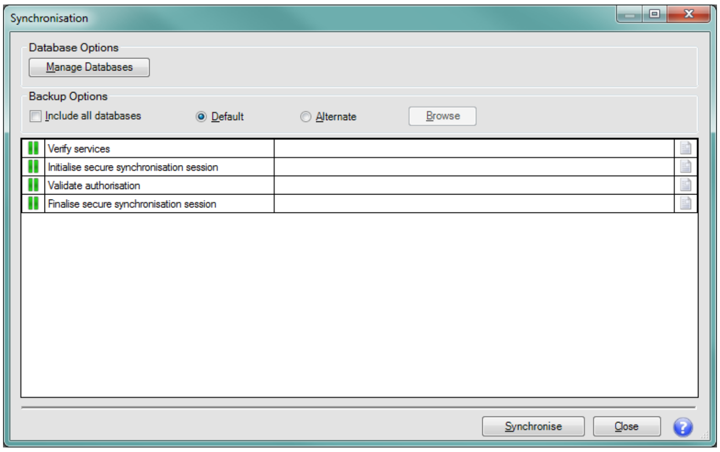
3. On the **Analysis Options** screen, tick the box to 'Include a graphical representation (chart) of the grid data'. Select the headings to be displayed in the X and Y Axis Columns. Click **OK.**

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.

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 to program, or exit.

For slow internet connections, you should tick the 'include all databases' tick box. This will backup the Sentinel, Analysis, and system databases that are created from synchronisation. Only updates are held in these databases decreasing the download amount on synchronisation if a backup is restored.

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.

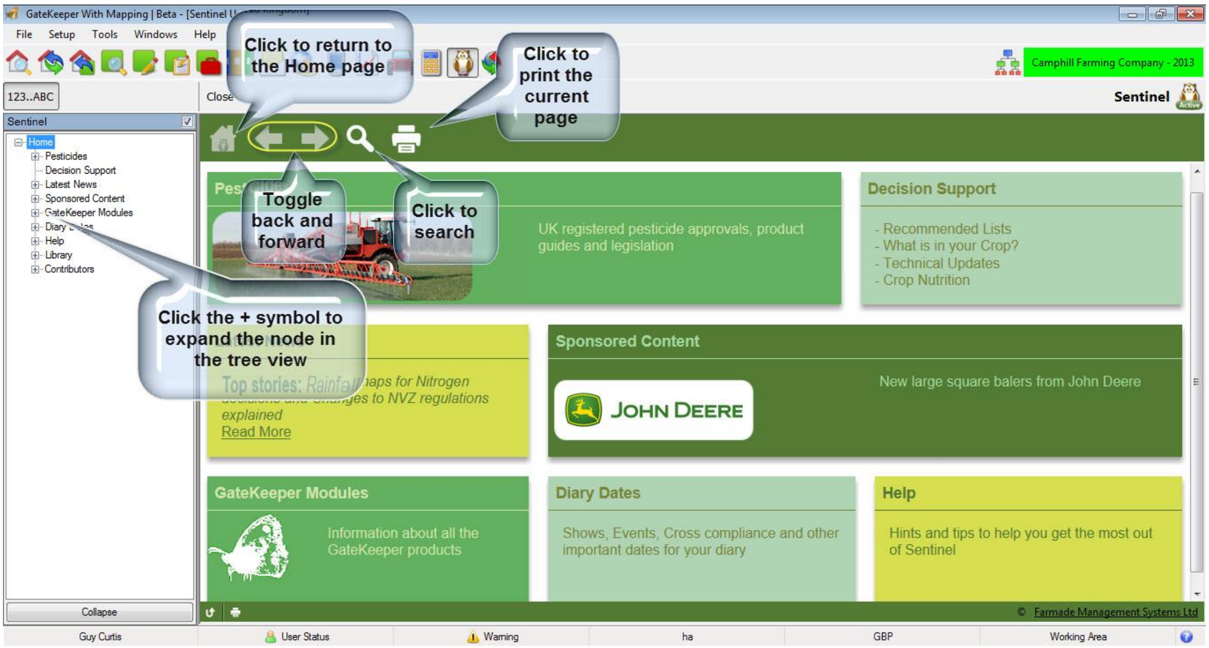
Clicking **Synchronise** will begin the process and any downloads will be collected from the Gatekeeper Server. When synchronisation has finished, click **Close** and Gatekeeper will self-update and require you to log on again to re-enter the program, or exit.

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 plans). 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.