



Horse Training

Trainers

Training Plan

Training Schedule

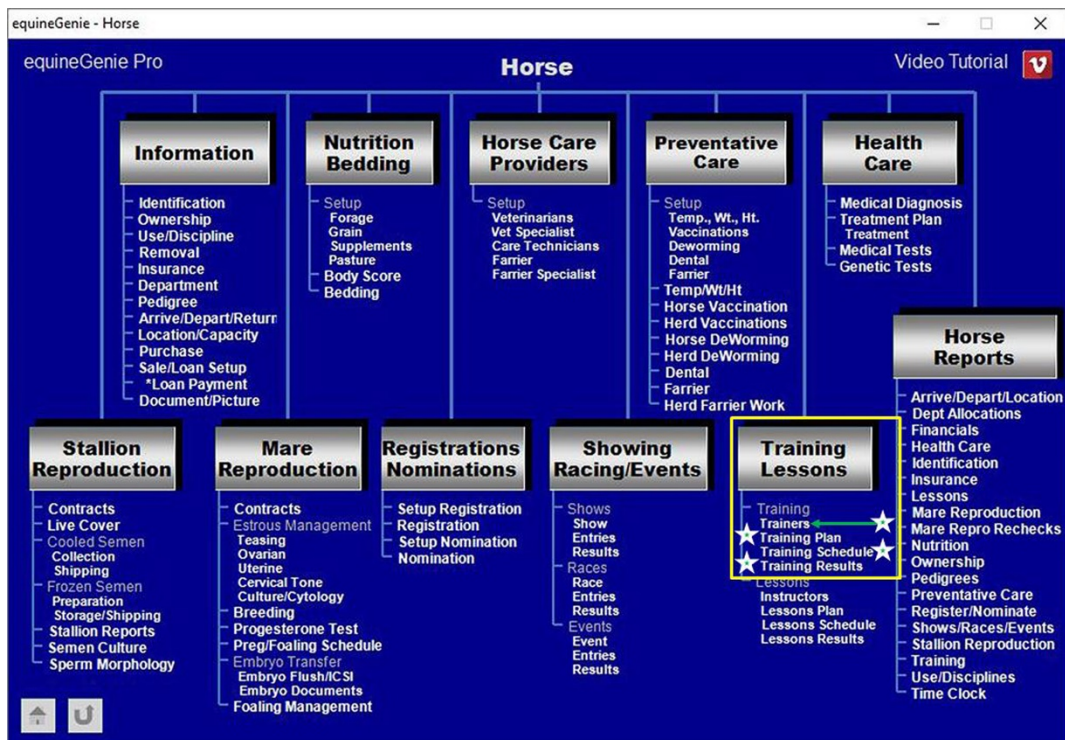
Training Results

Horse Training

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Horses Training – Trainers

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There are no prerequisites required before horse trainers can be entered.

① **Enter or select** a horse trainer from the *Enter or Select A Trainer* dropdown.

Note 1: If a previous trainer had been entered, equineGenie would have remembered it and it would be available for selection. If it is a new trainer entry, select **[New Trainer]** from the *Enter or Select A Trainer* dropdown and enter the trainer. EquineGenie will remember the trainer for future selection.

② **Select the trainer's specialty** from the *Training Specialty* dropdown. A training specialty is selected by selecting the check box next to a training specialty. Multiple training specialties boxes can be checked. To remove selected specialties just uncheck a specialty box.

③ **Enter the trainer's address** in the *Address* box.

Enter the trainer's city, state and zip code in the *City, State, Zip Code* box.

Enter the trainer's telephone in the *Phone* box.

Enter the trainer's emergency telephone in the *Emergency Phone* box.

Enter the trainer's email address in the *email Address* box.

Enter the trainer's website address in the *Website Address (URL)* box.

④ **The trainer's contact information can be added to the equineGenie** business address book by selecting the *Add To Address Book* button.

⑤ **To Enter a trainer's picture:**

Select the Locate button to locate the trainer's picture file. Selecting open will automatically add the trainer's picture to equineGenie. Selecting the View button allows you to view the picture. Selecting the Clear button will remove the trainer's picture from equineGenie.

⑥ **To add another trainer**, select the orange **Another Trainer**. Selecting **Another Trainer** clears the previous trainer's information enabling a new trainer to be entered.

⑥ **Enter** any comments or notes associated with the selected trainer's information.

⑦ **Select** enter before leaving the *Horse Training – Trainers* screen.

① **Selection** of the 'View Trainers' button will enable all the trainer's information to be viewed, exported or printed.

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Horses Training – Training Plans

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There are prerequisites required before a horse's training plan can be entered. A horse must be entered in equineGenie, ([Horses: Information: Identification](#)). A horse must be identified for training in equineGenie, ([Horses: Information: Use/Discipline](#)). A trainer must be entered and their training specialties identified on the Horse Training – Trainers screen ([Horses Training – Trainers](#)).

① **Select** the horse from the *Select A Horse* dropdown.

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select A Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen. A horse must have been previously identified in equineGenie for training to appear in the *Select A Horse* dropdown. Horses are identified for training in equineGenie on the *Horse Information – Use / Discipline (Select Use)* screen.

② **Select** the horse's training discipline from the *Select A Training Discipline* dropdown. The horse's training disciplines that were identified on the *Horse Information – Use / Discipline (Select Discipline)* screen are displayed in the *Select A Training Discipline* dropdown.

Note 2: The horse's discipline(s) must have been identified on the *Horse Information – Use / Discipline (Select Discipline)* screen to be displayed in the *Select A Training Discipline* dropdown.

③ **Identify** a trainer from the *Identify A Trainer* dropdown. Trainers whose training specialties that were identified on the *Horse Training – Trainers* screen that match

the horse's selected training discipline will be displayed in the *Identify A Trainer* dropdown.

- ④ **Select** the type of training from the *Select The Type Of Training* dropdown. If the training type is not available in the dropdown, 'click' in the *Select The Type Of Training* dropdown and enter the type of training. equineGenie will remember the type of training entered for future selection.
- ⑤ **Identify** the rider for the selected training type from the *Identify A Rider* dropdown. If the rider is not available in the dropdown, 'click' in the *Identify A Rider* dropdown and enter the rider. equineGenie will remember the rider entered for future selection.
- ⑥ **If there is another training discipline for the same horse**, selecting the **Another Discipline, Same Horse** will enter and clear the previous discipline information so another discipline for the same horse can be entered.
- ⑦ **If another horse needs to be entered for a training plan**, selecting **Another Horse** will enter and clear the previous plan information enabling the information for a new horse's training plan to be entered.
- ⑧ **If you need to remove a training plan**, it can be removed by displaying the training plan information to be removed and selecting the **Red Remove Selected Training Plan** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the selected training plan.



After selecting **OK** on the **Delete Item** popup you need to select the **Enter** button⑩.

- ⑨ **Enter** any comments or notes associated with the selected horse's training plan information.
- ⑩ **Select** enter before leaving the *Horse Training – Training Plan* screen.
- ① **Selection** of the '*Horse Training Plan*' button will enable the selected horse's training plan information to be viewed, exported and/or printed.
- ② **Selection** of the '*Training Plans*' button will enable all the horses' training plan information to be viewed, exported and/or printed.

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Horses Training – Training Schedule

Path: Home: Horses: Training Lessons: Training Training Schedule

There are prerequisites required before a horse's training schedule can be entered. A horse must be entered in equineGenie, (Horses: Information: Identification). A horse must be identified for training in equineGenie, (Horses: Information: Use/Discipline). A trainer must be entered and their training specialties identified on the Horse Training – Trainers screen (Horses Training – Trainers).

① Select the horse whose training schedule will be entered from the *Select Horse* dropdown.

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen. A horse must have been previously identified in equineGenie for training to appear in the *Select Horse* dropdown. Horses are identified for training in equineGenie on the *Horse Information – Use / Discipline(Select Use)* screen.

② Select the horse's training discipline from the *Select A Training Discipline* dropdown. The horse's training disciplines that were identified on the *Horse Information – Use / Discipline (Select Discipline)* screen are displayed in the *Select A Training Discipline* dropdown.

Note 2: The horse's discipline(s) must have been identified on the *Horse Information – Use / Discipline (Select Discipline)* screen to be displayed in the *Select A Training Discipline* dropdown. They do not have to be the training discipline(s) identified on the *Horse Training – Training Plan* screen.

- ③ **Enter the training date start time** in the *Start – Date/Time* dropdown by selecting the date from the calendar icon or by selecting [New Date] from the *Start – Date/Time* dropdown and entering date format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).

Note 3: Selecting the date from the calendar icon will enter the selected date and your computer's current time. To change the time, mouse over it and enter the correct time.

Entering a start date and time in the *Start – Date/Time* dropdown will enter the same date and time in the *End – Date/Time* dropdown. To change the date or time mouse over the date or time and enter the correct date or time. *The time is generally what needs to be changed unless a training session goes for more than one day.*

- ④ **Select** the type of training from the *Select A Type Of Training* dropdown. If the training type is not available in the dropdown, 'click' in the *Select A Type Of Training* dropdown and enter the type of training. equineGenie will remember the type of training entered for future selection.

Enter or select the training location from the *Enter or Select A Training Location* dropdown. If the training location is not available in the dropdown, 'click' in the *Enter or Select A Training Location* dropdown and enter the training location. equineGenie will remember the training location entered for future selection.

Note 4: equineGenie keeps track of facility usage to help in making facility decisions.

- ⑤ **Select a trainer** from the *Select A Trainer* dropdown. Trainers whose training specialties that were identified on the *Horse Training – Trainers* screen that match the horse's selected type of training discipline will be displayed in the *Identify A Trainer* dropdown.

Note 5: This prevents a trainer from being selected that are not qualified to train the selected horse in the identified discipline.

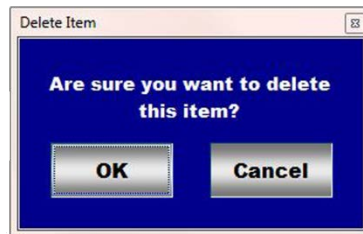
Select a rider if the selected trainer is not the handler or rider for the identified training. If the rider is not available in the *Select A Rider* dropdown, 'click' in the *Select A Rider* dropdown and enter the rider. equineGenie will remember the rider entered for future selection.

Select an assistant or volunteer if one is needed for the identified training. If the assistant or volunteer is not available in the *Assign An Assistant / Volunteer* dropdown, 'click' in the *Assign An Assistant / Volunteer* dropdown and enter the assistant or volunteer. equineGenie will remember the assistant or volunteer entered for future selection.

- ⑥ **If the same training needs to be scheduled on another date and time**, select the **Another Date/Time, Same Horse/Discipline**. Selecting **Another Date/Time, Same Horse/Discipline** keeps the previous training information; increments the previous start and end date by one day, but keeps the same start and end time. The date and or time can be changed by mousing over them and entering a new date and or time.

Note 6: This assists in expediting a horse's extended training schedule entries.

- ⑦ If another training discipline needs to be scheduled for the same horse, select the **Another Discipline, Same Horse**. Selecting **Another Discipline, Same Horse** enters and clears the previous training information so a new training discipline can be scheduled.
- ⑧ Selection of **Another Horse** enters and clears the horse's previous training information enabling a new horse's training to be scheduled.
- ⑨ If you need to remove a selected training schedule, it can be removed by displaying the training schedule information to be removed and selecting the **Red Remove Selected Training** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the selected training schedule.



After selecting **OK** on the **Delete Item** popup you need to select the **Enter** button ⑩.

- ⑩ **Enter** any comments or notes associated with the selected training schedule information.
- ① **Select** enter before leaving the *Horse Training – Schedule* screen.
- ② **Selection** of the 'View Horse Training Schedule' button will enable selected horse's training schedule to be viewed, exported and/or printed.
- ③ **Selection** of the 'Training Schedule Current Day' button will enable all horses' current day training schedules to be viewed, exported and/or printed.
- ④ **Selection** of the 'Training Schedules – Date Specified' button will enable all horses' training schedules within a specifies date range to be viewed, exported and/or printed.
- ⑤ **Selection** of the 'Training Calendar Detail – Date Specified' button will enable all horses' training schedule detail to be viewed, exported and/or printed in a calendar format.
- ⑥ **Selection** of the 'Training Calendar Summary – Date Specified' button will enable all horses' training schedule summary to be viewed, exported and/or printed in a calendar format.
- ⑦ **Selection** of the 'View Horse Trainer Schedule' button will enable all horse trainer schedules to be viewed, exported and/or printed.

Information: Additional horse training reports are available in the *Horse Reports – Training* screen. [Path - Home: Horses: Horse Reports: Training.](#)

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Horses Training – Training Results

Path: Home: Horses: Training Lessons: Training Training Results

There are prerequisites required before a horse's training results can be entered. A horse must be entered in equineGenie, ([Horses: Information: Identification](#)). A horse must be identified for training in equineGenie, ([Horses: Information: Use/Discipline](#)). A trainer must be entered and their training specialties identified on the Horse Training – Trainers screen ([Horses Training – Trainers](#)).

The screenshot shows the 'equineGenie Horse Training - Training Results' window. The left sidebar contains the following elements:

- Training Results** section:
 - Select Horse (1)**: A dropdown menu.
 - Training Date (2)**: A date field with a calendar icon.
 - Type Of Training (3)**: A dropdown menu.
 - Start Training (4)** and **Stop Training**: Buttons with clock icons.
 - Training Location**: A text field.
 - Training Discipline**: A dropdown menu.
 - Trainer (5)** and **Rider**: Dropdown menus.
 - Time/Score (5)**: A text field.
 - Business Owner (6)** and **Training Cost**: Text fields.
- Training Documents / Pictures / Videos** section:
 - Identify Training Documents / Picture / Videos**: A dropdown menu.
 - Training Files (7)**: A section with **Locate**, **View**, and **Clear** buttons.
 - Another Training Picture**: A button.
 - Remove Training Result (8)**: A button.
- View Selected Horse Training (3)**: A button.
- Training Pictures / Videos Saved (4)**: A button.

The right sidebar contains the following elements:

- Training Comments (9)**: A large text area.
- Document, Picture, Video Comments (10)**: A smaller text area.
- Enter (2)** and **Video Tutorial (v)**: Buttons.
- Enter and Charge the Horse/Customer (Go To Horse Billing Log) (1)**: A button.
- Popup And Red Flag equineGenie Notes**: A large yellow box.
- Horse Training - Date Specified (5)** and **Horse Training - Date Specified w/Cost (6)**: Buttons.

- ① Select the horse whose training results will be entered from the *Select Horse* dropdown.

Note 1: A horse must have been previously entered in equineGenie to appear in the *Select Horse* dropdown. Horses are entered in equineGenie on the *Horse Information – Identification* screen. A horse must have been previously identified in equineGenie for training to appear in the *Select Horse* dropdown. Horses are identified for training in equineGenie on the *Horse Information – Use / Discipline (Select Use)* screen.

- ② Enter the training date in the *Training Date* dropdown by selecting **[New Date]** from the *Training Date* dropdown or selecting the date from the calendar icon. Selection of **[New Date]** from the *Training Date* dropdown will enter your computer's current date. The date can be changed by mousing over the date and entering a different date in the format set in your windows operating system, (mm/dd/yyyy or dd/mm/yyyy).
- ③ Select the type of training from the *Type Of Training* dropdown. If the training type is not available in the dropdown, 'click' in the *Type Of Training* dropdown and enter the type of training. equineGenie will remember the type of training entered for future selection.

- ④ **Enter the start training time** in the *Start Training* box by selecting the time from the clock icon. If the time entered from the clock icon is incorrect it can be changed by mousing over the time and entering the actual training start time.

Enter the stop training time in the *Stop Training* box by selecting the time from the clock icon. If the time entered from the clock icon is incorrect it can be changed by mousing over the time and entering the actual training start time.

- ⑤ **Select** the training location from the *Training Location* dropdown. If the training location is not available in the dropdown, 'click' in the *Training Location* dropdown and enter the location. equineGenie will remember the training location entered for future selection.

Select the training discipline from the *Training Discipline* dropdown. The only training disciplines available for selection from the *Training Discipline* dropdown are the training disciplines entered on the horse's training plan screen in this document. ([*Horse Training – Training Plans*](#))

Select the trainer from the *Trainer* dropdown. A trainer identified on the horse's training plan screen will be automatically displayed in the *Trainer* dropdown. If the trainer needs to change, all identified trainers identified on the *Horse Training – Trainers* screen will be available for selection from the *Trainer* dropdown.

Select a rider from the *Rider* dropdown. A rider identified on the horse's training plan screen will be automatically displayed in the *Rider* dropdown. If the rider needs to change, all previously identified rider will be available for selection from the *Rider* dropdown.

If the training was timed or scored, enter the time or score in the *Time/Score* box.

- ⑥ **Enter any cost to the business** associated with the training in the *Training Cost* box.

Note 2: If a business cost is entered, the \$ to the right of the Cost box will turn **Red**. Selection of the \$ will display the *Payment Method* popup to initiate recording the financial transaction associated with the training. Completing a payment transaction is explained in the *Deposits and Payments training documents*.

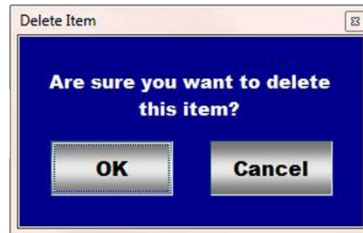
- ⑦ **To Enter any training documents, pictures or videos for the training result:**

Enter or select the item's storage identity from the *Identify Training Documents / Picture / Videos* dropdown. To enter a new storage item, select **[New Item]** from the *Identify Training Document / Picture / Videos* dropdown and add the new item's identity. To recall a previously stored item, select the item's identity from the *Identify Training Document / Picture / Videos* dropdown.

The item can be stored in equineGenie by selecting the Locate button to locate the item's file. Selecting open will automatically add it to equineGenie. Selecting the View button allows you to view the item. Selecting the Clear button will remove the item from equineGenie.

To store another item for the same training, select the orange **Another Training Picture**. Selecting **Another Training Picture** clears the previous item's storage information enabling a new item to be entered.

- ⑧ If you need to remove a selected training result, it can be removed by displaying the training result information to be removed and selecting the **Red Remove Training Result** button. When the button is selected a **Delete Item** popup will be displayed to make sure you want to delete the selected training result.



After selecting **OK** on the **Delete Item** popup you need to select the **Enter** button ②.

- ⑨ **Enter** any comments or notes associated with the selected training result information.
- ⑩ **Enter** any comments or notes associated with the selected training document, picture or video information.
- ① If the horse being trained is a customer horse, **selecting** the, '*Enter and Charge the Horse/Customer (Go To Horse Billing Log)*' button will enter the horse's training results information; any training results financial transaction and display the *Horse Billing Log*. The horse's name and the horse training date will be automatically displayed on the *Horse Billing Log*.
- ② **Select** enter before leaving the *Horse Training – Training Result* screen.
- ③ **Selection** of the '*View Selected Horse Training*' button will enable the selected horse's training results to be viewed, exported and/or printed.
- ④ **Selection** of the '*Training Pictures / Videos Saved*' button will enable a list of the selected horse's training documents, pictures and videos to be viewed, exported and/or printed.
- ⑤ **Selection** of the '*Horse Training – Date Specified*' button will enable all horses' training results within a specified date range to be viewed, exported and/or printed in a calendar format.
- ⑥ **Selection** of the '*Horse Training – Date Specified w/Cost*' button will enable all horses' training results with training cost within a specified date range to be viewed, exported and/or printed in a calendar format.

Information: Additional horse training reports are available in the *Horse Reports – Training* screen. [Path - Home: Horses: Horse Reports: Training.](#)

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