EMBER™

EQUINE

USER'S MANUAL

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WARNING! This symbol indicates that failure to follow directions could result in serious injury.

CAUTION: This symbol indicates that failure to follow directions could result in damage to equipment or loss of information.

Part Number 27209-02

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CHAPTER 1

Getting Started

System overview

EmberEquine™ field software runs on a Mesa 2 Rugged Tablet™ or a supported Windows 10 device for collection of veterinary exam data, including images captured by the Draminski 4VetJ Ultrasound™. EmberEquine simplifies the process of storing exam data and sharing reports.

During a veterinary examination, the veterinarian or an assistant uses EmberEquine to enter exam data.

A wireless connection between the Windows 10 device and the Draminski 4VetJ Ultrasound allows ultrasound images to be saved directly in EmberEquine with other exam data.

EmberEquine allows customization of data fields for contacts, locations, animals, exams, and events.

With a cloud subscription, EmberEquine synchronizes exam data and ultrasound images to cloud storage, sharing data with other team members who are also running EmberEquine software, and making it easy to create reports and share information with the clinic office and clients.

For information about subscription services, refer to *www.emberequine.com*.

Online resources

The User's Manual may be updated periodically. Please refer to these URLs for updated documentation, training videos, and downloads:

- *www.junipersys.com/emberequine/support*
- *www.junipersys.com/emberequine/downloads*

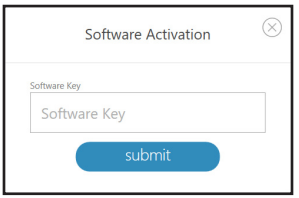
Starting Ember for the first time

The first time you run the EmberEquine software, you need to complete the software activation process by entering the license key.

Your package may include both an EmberEquine Field Software license key and an EmberEquine Office Software license key. The key for the Field license enables all features in the software. Use the Field license on the Mesa 2 or other Windows 10 tablet device used to perform veterinary

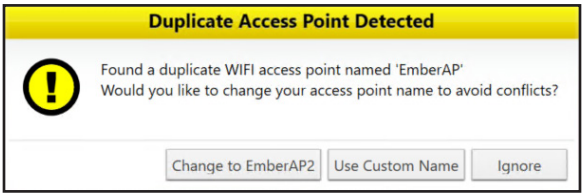
exams. The Office license cannot create exams, edit exam data or connect with the 4VetJ ultrasound.

Enter the key, and click the submit button. If there is an internet connection, the software contacts the license server to activate the software. If there is not an internet connection, you will need to follow the instructions on the screen to activate the software over the phone.



After the software is activated, you may see a prompt indicating that a duplicate access point name was detected. This means that there is another Windows 10 device running EmberEquine, and you may need to configure a different access point name in EmberEquine and in the 4VetJ to make sure that the 4VetJ connects to your device instead of the other device that is in the same area.

The prompt provides options for ignoring the conflict or reconfiguring the access point name as shown in the screen shot. If you customize the access point name do not use spaces or special characters. The Wi-Fi network name appears in the top-left corner of the EmberEquine screen.



When the software is activated, the End User License Agreement (EULA) displays on the screen. Read the agreement and click the button to indicate that you understand the agreement.

For keys with a cloud subscription, a prompt to create a clinic (an online database) or to login to an existing clinic is presented. If you want to login to an existing clinic, then tap or click the Login button and then enter the clinic name and password. Otherwise, complete the clinic name, email address, and password. The clinic name and password are used to log into your cloud account. The email address is used to verify your account and to help you with password recovery.

To check whether you are logged in to a clinic cloud account, go to **settings** and then choose **cloud**.

CAUTION: If you do not use EmberEquine with a cloud account, your data is stored in a local database and is not synchronized with the cloud or other computers. If you change to an online database, the local database remains local and cannot be synchronized with the cloud or other computers. To be sure that you are working with a database that is synchronized with the cloud, create a new cloud account or log in to your cloud account if you have already created an account.

When using a cloud subscription with EmberEquine, the software updates the cloud database as changes happen. When an internet connection is available, the software automatically pushes changes up to the cloud and pulls changes from the cloud about every six minutes. In addition, the user can manually trigger synchronization by clicking the sync button in the cloud setup screen under settings. When closing the software, it will present a warning message if the synchronization has not completed.

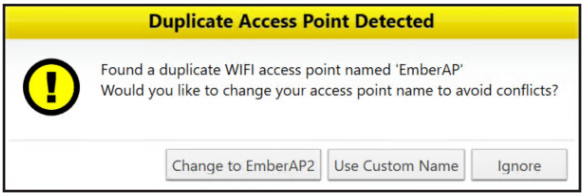
Mesa 2 cellular setup

For a Mesa 2 tablet with a cellular modem, you can maintain cellular internet connectivity by purchasing a SIM card with data service from a cellular carrier. Please refer to the Mesa 2 manual for details on configuring the cellular data connection.

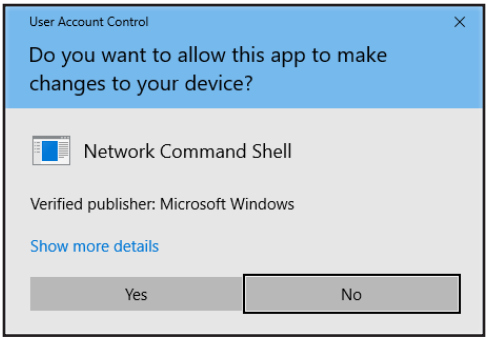
Linking with the 4VetJ ultrasound

When an exam form is open, EmberEquine starts the Wi-Fi access point service and the image transfer service. These are the features that allow the 4VetJ to connect to the Windows 10 device and to transmit images to the EmberEquine software.

If the software detects a conflicting Wi-Fi access point name, it displays a prompt, allowing you to ignore or change the Wi-Fi name.



You may also see a User Access Control prompt. Choose yes to start the Wi-Fi service. If you are not an administrator, you may be prompted to enter an administrator password.



From the factory, the 4VetJ comes configured to connect with a device running EmberEquine software, using the default wireless configuration shown in the following table.

Default Wi-Fi name	**EmberAP**
Default Wi-Fi password	**12345678**

If the default Wi-Fi name has changed (refer to the Wi-Fi name in the upper left corner of the EmberEquine window), you will need to configure the 4VetJ Wi-Fi to connect with the new name.

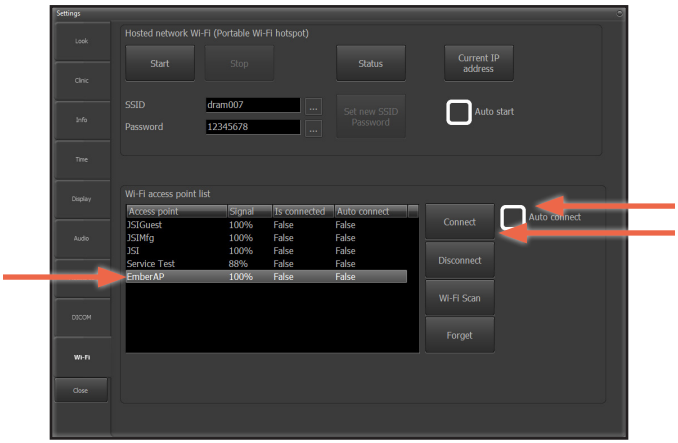
The 4VetJ normally connects to the device running EmberEquine, but if it does not connect, use the following steps to reconfigure the Wi-Fi configuration on the 4VetJ.

Start the EmberEquine software on the Windows 10 device.

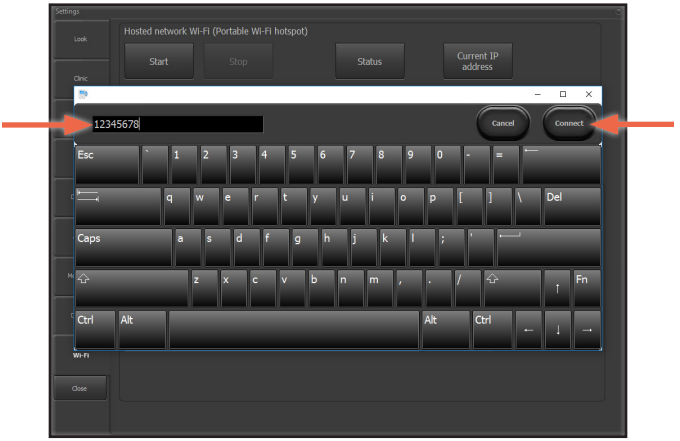
Start the 4VetJ and wait for the ultrasound app to open.

In the ultrasound app, go to **settings** and then choose **Wi-Fi**.

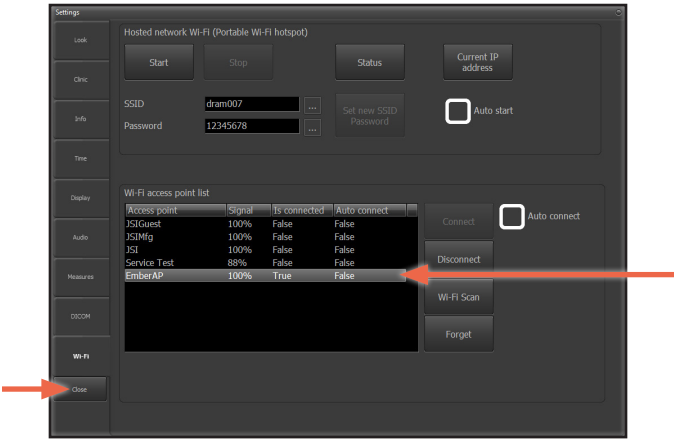
From the list of networks shown on the 4VetJ, select the Wi-Fi network name that matches the network name shown in the EmberEquine software (typically EmberAP), de-select the **auto connect** check box, and then tap **connect**. If you do not see the access point in the list, use the **Wi-Fi scan** button.



At the Wi-Fi network password prompt, use the default password, 12345678, and then choose the option to **connect**.



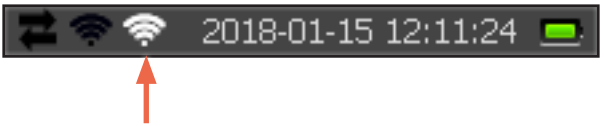
The Wi-Fi settings screen shows the 4VetJ connected to EmberEquine. Use the **close** button to return to the main screen on the 4VetJ.



To verify the wireless connection in EmberEquine, tap or click the Wi-Fi icon in the top-left corner of the screen to open the Wi-Fi status screen. The number of clients should show that one client is connected.

Wi-Fi status

On the main screen of the ultrasound app, the Wi-Fi status is indicated. Two Wi-Fi icons appear in the status bar. The icon on the right, near the date and time, appears white when the 4VetJ is connected to the EmberEquine software as shown in the following screen shot.



Troubleshooting Wi-Fi with the 4VetJ

If you do not see the EmberEquine access point name listed on the Wi-Fi screen on the 4VetJ, allow a few seconds for the list to refresh. If the access point name does not appear, close the settings to return to the main ultrasound screen, use the X in the upper-left corner to close the ultrasound app, and then start the ultrasound app again.

If you are still unable to connect the ultrasound with EmberEquine, try restarting both the 4VetJ and the PC running EmberEquine, and then try connecting again.

Getting started with EmberEquine

Consider the tasks in the following sections for getting started with EmberEquine. These sections offer a brief introduction to help get you started. Later chapters and sections cover these topics in more detail.

Customizing forms

Forms in EmberEquine provide the interface for collecting data. The default forms cover the needs for most users. If you need different forms, EmberEquine provides tools for customizing existing forms and for creating new forms.

Since customizing forms impacts the way that you enter data and the way that the data is stored, use extra care and consideration before using the form customization tools. When a form is changed, it is changed for all users of the clinic cloud account.

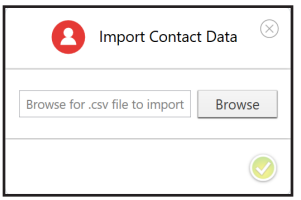
To customize forms, go to the menu, select **settings** and choose **edit forms**.

For more detail on this topic, refer to the section later in this manual for customizing forms.

Importing contacts

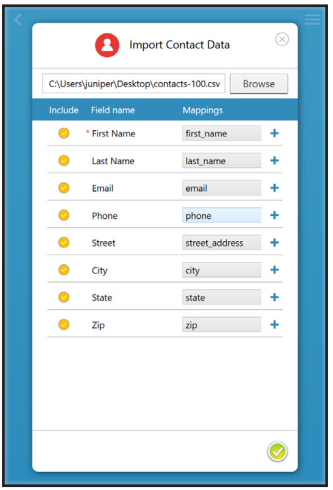
You may want to import contacts from other software so that you don't have to manually enter the information. Use a CSV file to import directly into EmberEquine by going to the menu, selecting **settings** and choosing **import**.

Choose the CSV file to import.

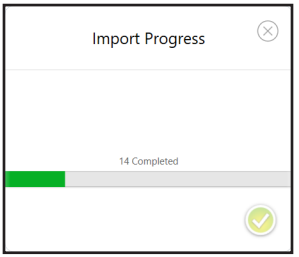


Select how the fields in the CSV file map to the fields in EmberEquine. The left column shows the field names in EmberEquine. For each field in EmberEquine, choose the corresponding field from the CSV file. The plus icon to

the right of each field mapping gives the option to map multiple fields from the CSV to the field in EmberEquine. If multiple fields are mapped from the CSV file, the import process uses the data from the first field containing data. To skip an import mapping for a field, tap the check mark to the left of the field name.



Click the **check mark** to start the import.



Importing other types of data

The default configuration of the other types of forms do not allow data import. The other forms include one or more required relationship fields, and CSV import does not lend itself to creating the relationship links with the data in the other forms.

The process to work around this limitation is to edit the form (refer to the section on customizing forms) and change the required relationship fields to unrequired, and this will allow for import of CSV data into the form. To check if a required field is a relationship field, use the gear icon for that field and choose edit from the menu. This shows the field type.

Since the required relationship field is important for reporting, we recommend changing the field back to required after the import and then manually entering the relationship to the correct record for each of the newly imported items of data.

Starting an exam

Choose **start** on the EmberEquine home screen to begin collecting exam information.

The software guides you to select a location and an animal, giving you the option to create new entries in the database for the location and animal if they are not already in the system.

After choosing the location and animal, the software prompts you to select the exam form (i.e. Repro Exam or Pregnancy), and then opens the form to begin entering data during the exam.

While the exam form is open, the ultrasound may send images, and EmberEquine automatically associates those images with the exam.

CHAPTER 2

Navigating EmberEquine

Icons

The following table shows the icons used in the EmberEquine software.

Icon	Description
	wireless network
	4VetJ ultrasound images
	start
	reports
	settings
	menu
	home
	new
	search
	exam
	location
	contact

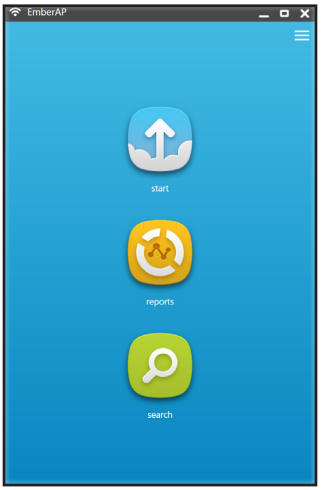
Icon	Description
	event
	animal
	mare
	stallion
	edit forms
	about
	import
	cloud

Screen orientation

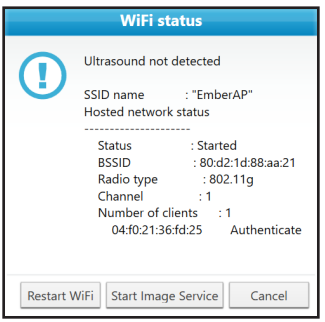
Screen shots in this manual appear in portrait orientation. But the software adjusts to display in either portrait or landscape orientation.

Home screen

The home screen provides shortcuts to start an exam, create reports, and to search records (e.g. exams, contacts, locations, and animals). The menu icon ☰ provides additional options. The WLAN name used to link with the 4VetJ appears in the top-left corner of the screen (EmberEquine Field license only).

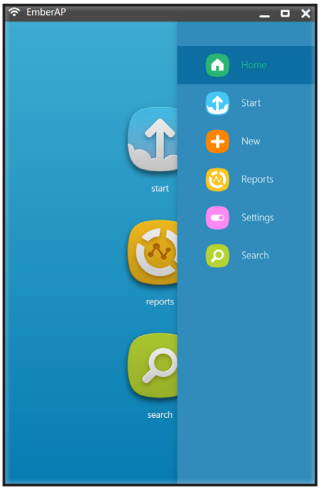


To troubleshoot the WLAN connection, tap or click the WLAN icon in the top-left corner of the screen. This displays some diagnostic information for the wireless connection.



Menu

The menu may be accessed from within most screens in the software, providing quick access to various functions. The menu icon appear in the upper-right corner of the screen. The menu icon is covered by the menu in the screen shot that follows, refer to home screen section in this chapter.



Home

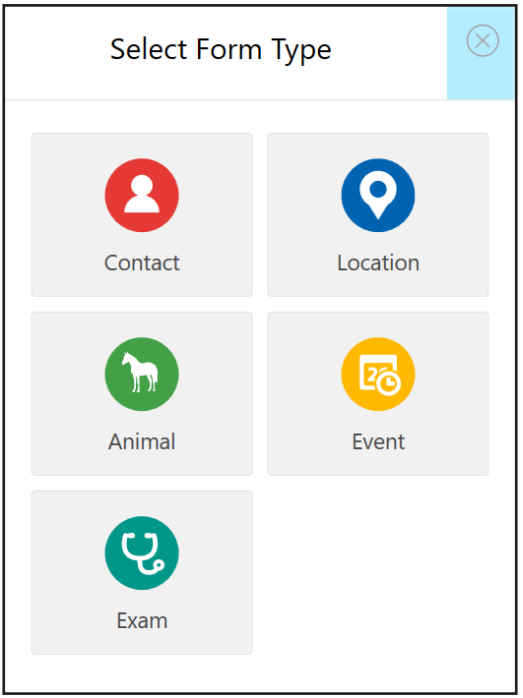
The home option in the menu returns the software to the home screen.

Start

The start option, shown in the menu and on the home screen, provides convenient access for starting a new exam. Start helps to streamline the process for entering data in a new exam by giving options to choose from existing locations and animals, modify information about an existing location or animal, or creating new locations or animals.

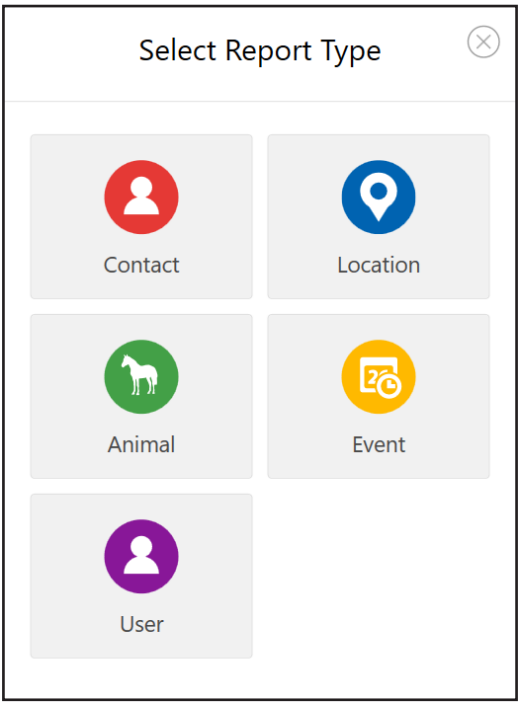
New

The new option in the menu presents the forms that are available for adding new information in the database. After selecting the form, EmberEquine shows the form, allowing entry of the new information.



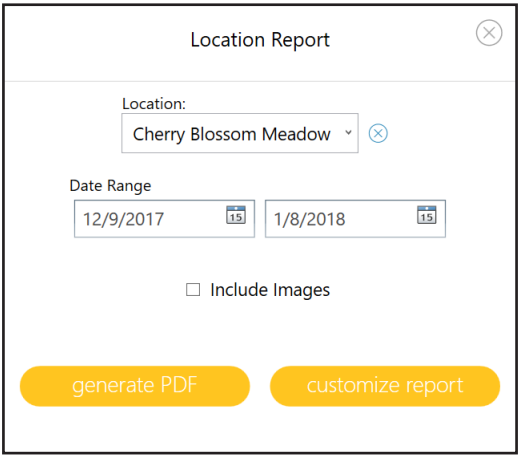
Reports

The reports option, shown in the menu and on the home screen, provides options for generating different types of reports.



Reports show exam data or other information related to the type of report selected.

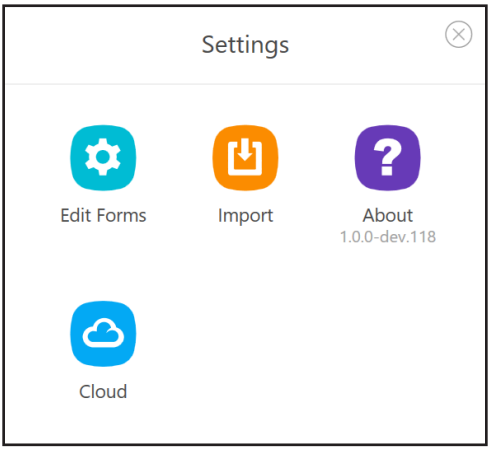
After selecting a report type, options for generating the report are presented. These options include the date range and whether to include the ultrasound images.



Use the generate PDF button to generate a report in PDF format. If you need a report in a different format, use the customize report option to choose the report format and other options.

Settings

The settings option in the menu presents software configuration options for EmberEquine.



Edit forms

Edit Forms shows the options for adding or deleting subforms and for customizing the data fields associated with each form and subform. This administrative feature requires the user to authenticate with the cloud to make changes.

Exercise caution when changing forms. Changes to forms are global, and propagate through the cloud to all other computers and users with the same clinic cloud account.

Refer to the section on *customizing forms* for details on how to edit forms.

Import

Import shows the option to import contacts from a CSV file. Other types of data can be imported. Refer to the section on importing other types of data in chapter 1.

About

Use the About screen to see information about the software version, license key, license type (Full or Office), cloud access expiration date, contact information for support, copyright, or the End User License Agreement (EULA). This screen includes a button for changing the license key. The

option to change the license key is used if you need to upgrade from a demo license key or if you need to move your license from one computer to another computer. When moving a license from another computer, the old computer is automatically de-authorized.

Cloud

Cloud shows the setup and configuration for synchronizing EmberEquine data with the cloud.

Search

The search option, shown in the menu and on the home screen, helps to find contacts, locations, animals, exams, and events in the EmberEquine database.

From the search feature, you can view details of individual records by clicking on the name of the item in the search list. You can edit the details of a record by clicking on the icon to the left of the name, and using the edit button that appears in the bar at the bottom of the screen. And you can generate a report or delete records by clicking on one or more of the icons to the left of the names in the list and using the report or delete button in the bar at the bottom of the screen.

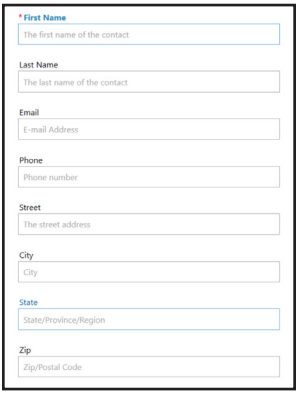
CHAPTER 3

Forms

Contacts

EmberEquine uses contacts to link data with owners or managers of animals and locations.

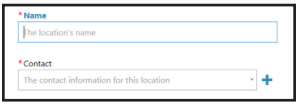
By default, contact information includes the fields shown in the following screen shot. You may use the forms editor to customize the data stored in contact forms (**settings > edit forms**).



Locations

EmberEquine uses locations to link data with exams performed at a location.

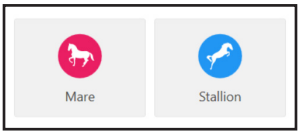
By default, location information includes the fields shown in the following screen shot. You may use the forms editor to customize the data stored in location forms (**settings > edit forms**).



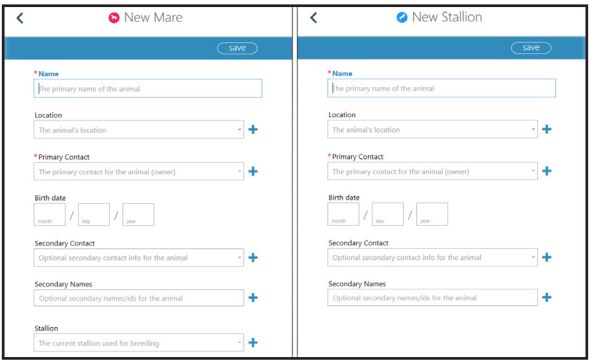
Animals

EmberEquine focuses on data collection for animals, and the animal forms store information about each animal.

By default, EmberEquine includes two subforms for animal information: mare and stallion.



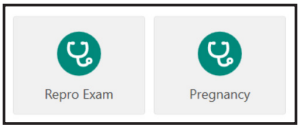
The following screen shots show the default fields for these. You may use the forms editor to customize the data stored in animal forms (**settings > edit forms**).



Exams

EmberEquine focuses on recording information from veterinary exams. Exam information is recorded in the exam forms, and these forms each link to an animal in the database.

By default, EmberEquine includes two subforms for exams: repro exam and pregnancy.



You may use the forms editor to customize the data stored in exam forms (**settings > edit forms**).

To see information about the meaning of abbreviated headers in forms, select the header.

Exam date

In exam forms, the exam date is automatically set to the current date. You may manually change the exam date when entering or editing data in the exam by clicking in the exam date field.

Gestation length

In the pregnancy exam, gestation length is automatically calculated if the ovulation field in a previous repro exam was set to "yes." The calculation uses the exam date from the repro exam for the gestation length calculation.

Events

EmberEquine uses events to track appointments for upcoming exams.

Customizing forms

The form editor allows customization of forms with the ability to modify existing forms and to create new forms. Within a form, the software allows customization of existing fields and the addition of new fields.

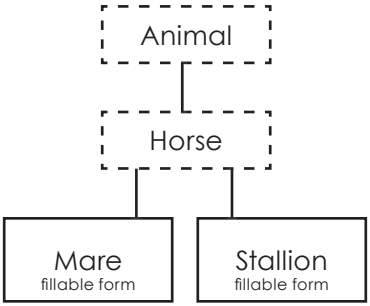
CAUTION: Be cautious and plan your changes carefully when customizing forms. Customization of forms is a powerful feature, allowing you to customize how forms are presented and how data is stored. When you make a change to a form, it changes that form for all users that use that cloud account.

Creating new forms

A new form becomes a child of the existing parent form under which it is created, and this relationship controls how the software presents the selection of forms when choosing a form to enter data. When creating a new form, consider the existing forms, how they relate to each other, and how you want the new form to be related in that structure so that it is easy to select.

A new form starts with the same fields of the parent form under which it was created. You may customize the existing fields, add new fields, and arrange the fields as needed.

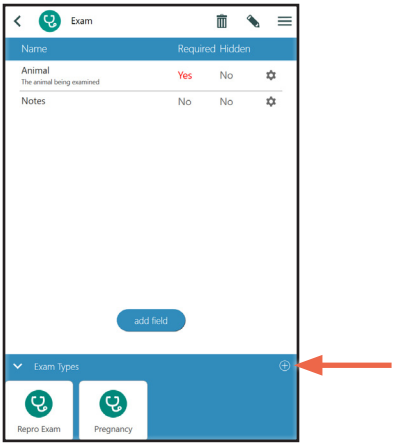
In considering the parent-child relationships between forms, be aware that the only forms available for data entry are the forms that do not have child forms. For example, the software has a form for animals with a child form for horses, and the horses form has child forms for stallion and mare. In this example, the software only allows entry of data into the mare and stallion forms because they do not have child forms. The figure below illustrates the concept in this example.



To create a new form, go to **settings**, choose **edit forms**, and select the type of form you want.

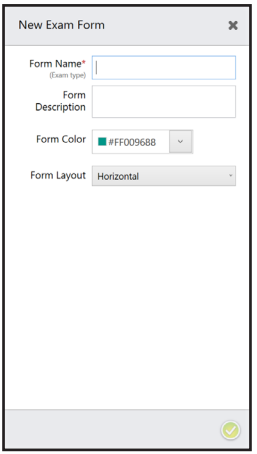
You can create your form under the main form category, or you can create the form under one of the other forms that appear in the area near the bottom of the window.

Use the **plus icon** ⊕ in the bottom area of the window to add the new form.



EmberEquine presents the options for the new form. Enter the form name, and if desired enter the form description, set the form color, and choose the form layout. The vertical layout displays the form in a traditional style where input fields appear in order from the top of the screen. The horizontal layout displays the form as if it were a row in a spreadsheet with fields labeled across the top of the screen. Any form can be modified to use either vertical or horizontal layout.

Use the **green check** icon to accept the settings and create the new form.



Customizing data fields

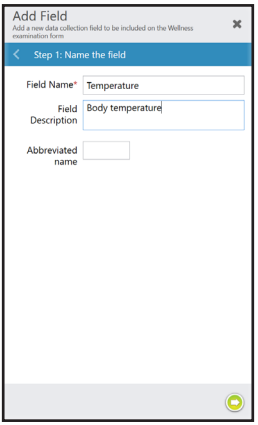
In a form, the software provides several options for customizing and arranging the fields. Use the **gear icon** ⚙ for the field to access these options. The following table describes the options.

Option	Description
move up move down move top move bottom	These options allow fields to be arranged into a specific order.
hide unhide	These options control whether the field is visible or invisible. A field might be hidden if it was used in the past, and is no longer needed.
make required make unrequired	A required field must be filled when completing the form.
edit	The edit option opens a dialog for modifying the name, description, and abbreviation.
delete	The delete option deletes the field. If any records contain data in this field, it cannot be deleted. Refer to the hide option as an alternative to hide a field in the form.

Creating a new data field

To create a new data field in a form, use the **add field** button.

Start by entering the field name. You may also specify the field description and the abbreviated name. The abbreviated name is used to label forms that display in horizontal layout, making the column more narrow. Hit the **green arrow** icon to continue.



In the next step, you need to choose the type of field. The following table describes the available field types.

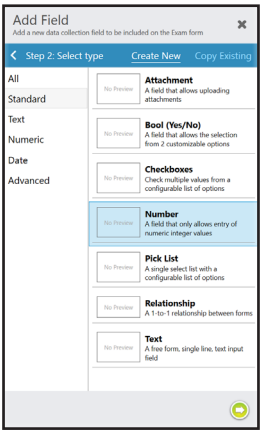
Type	Description
attachment	An attachment field allows stores files you want to attach to the record (images, spreadsheets, documents).
boolean (yes/no)	A boolean field stores either of two customized options (i.e. yes/no or male/female).
checkboxes	A checkboxes field stores multiple values from a configurable list of options.
date	A date field stores calendar dates.
decimal	A decimal field stores a number with digits after the decimal place.

Type	Description
multiline text	A multiline text field stores long strings of text and allows free form entry.
number	A number field stores an integer number.
numeric list	A numeric list field stores a list of integer numbers.
pick list	A pick list field allows for selection of an item in the customized list. The list supports a maximum of ten items.
relationship	A relationship field creates a one-to-one relationship with a record stored in another form. For example, you can link the current form to a specific contact.
text	A text field stores free form, single line, text.
text list	A text list field stores a list of text strings.

After naming the field, select the field type based on the type of data stored in that field.

If you want to copy the field definition from an existing field in another form, use the **Copy Existing** option in the upper-right section of the screen. If you wanted to reuse values in a pick list from another field, this method makes it easier than manually re-entering those values. This will guide you through the process of selecting the existing field that you want to duplicate.

By default, the field types are shown under the create new tab on this screen. Tap the **arrow icon** in the bottom-right corner to proceed.



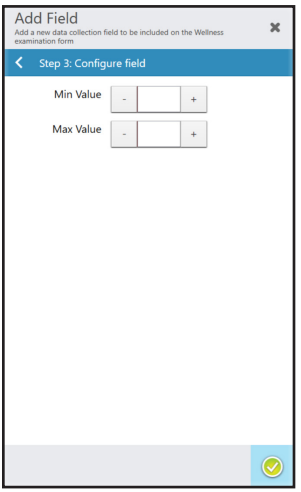
For attachment, multiline text, text, and text list fields, no further configuration is required, and the field is created at this point.

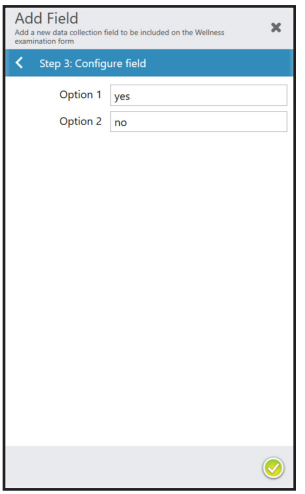
For number, numeric list, and rating fields, the software prompts for the maximum and minimum limits.

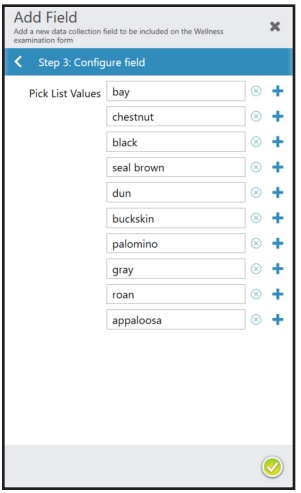
For boolean checkboxes, and pick list fields, the software prompts for the customized values available to the user when they are completing the form.

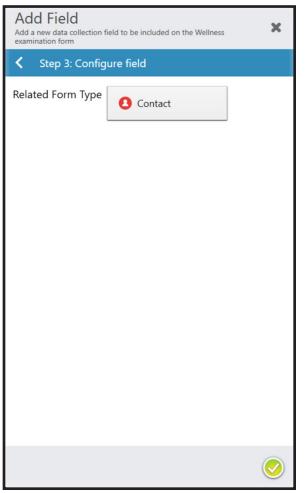
For the relationship field, the software prompts for the form to be related to this record.

The following screen shots show some examples of the page prompting for additional information to configure fields.

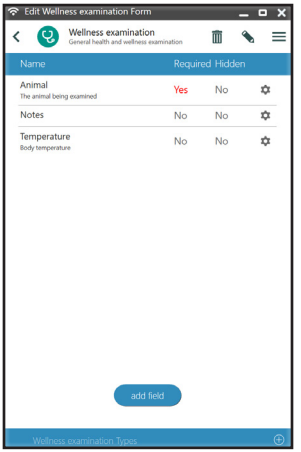




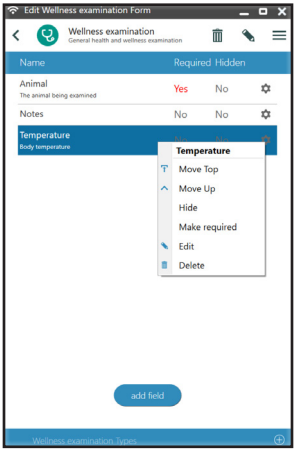




The new field appears in the list of fields for the form.



Use the gear icon for the field to choose where the field appears in the form and other options associated with the field.



CHAPTER 4

Working with Records

Using start

The start button, located on the home screen and in the hamburger menu, initiates a workflow to streamline collection of exam data. The start work flow, shown below, prompts for the location, animal, and exam type to begin entering exam data quickly.

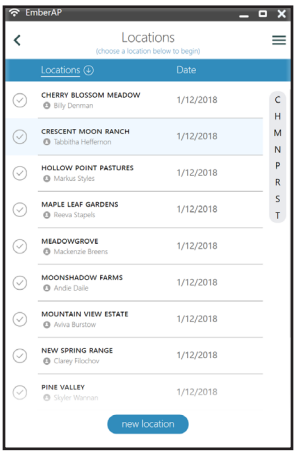
At each step, you may choose an item (location, contact, animal or exam) or create a new item if it does not yet exist in the database.

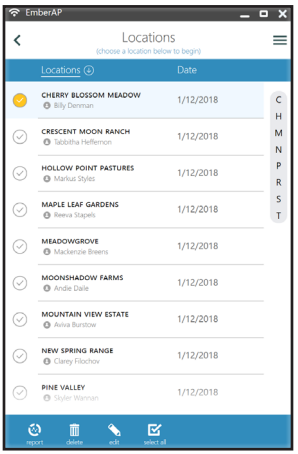
As you add or change data in forms, make note of the form navigation tool bar at the bottom of the window. It will navigate to the previous or next field in the form as well as providing options to enter data in the current field.

Choose start, and EmberEquine prompts you for the location and provides several options for selecting or working with existing location data as well as the option to enter information for a new location.

Select a location by tapping or clicking on the name (not the icon to the left of the name), or enter a new location by using the button that appears near the bottom of the screen.

Alternatively, you may choose to edit details about an existing location by tapping on the icon to the left of the name, and then using the edit button that appears in the bar at the bottom of the screen. Similarly, you may choose to delete one or more locations by tapping on the icon to the left of each name, and then using the delete button. To delete a record, any related data must first be deleted. The following screen shot on the right shows an item selected and the options bar at the bottom of the screen.

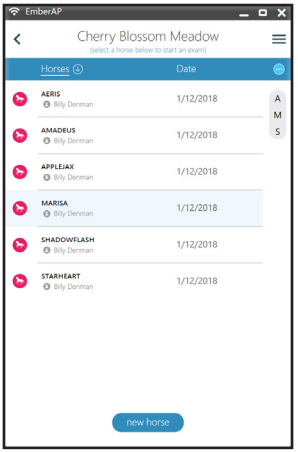


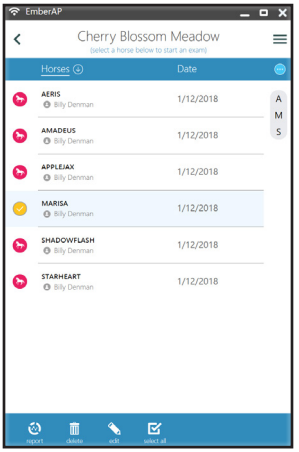


With a location selected, EmberEquine prompts you to select an animal that is associated with the selected location.

Select an animal by tapping or clicking on the name (not the icon to the left of the name), or enter a new animal by using the button at the bottom of the screen.

Alternatively, you may choose to edit details about an existing animal by tapping on the icon to the left of the name, and then using the edit button that appears in the bar at the bottom of the screen. Similarly, you may choose to delete one or more animals by tapping on the icon to the left of each name, and then using the delete button. When deleting an animal, any related data must be deleted first.





After having selected the animal, select the type of exam. If the exam form is not automatically opened, use the on-screen button near the bottom of the window to open the form.

When the exam form opens you, may see a User Access Control prompt. Be sure to choose yes to allow the Wi-Fi access point to start for connection with the 4VetJ ultrasound.

While the exam is open, images sent from the 4VetJ ultrasound will appear in the exam and will be saved with that exam.

After completing data entry for the exam, use the **save** button near the upper-right corner of the screen to save the exam record.

Using new

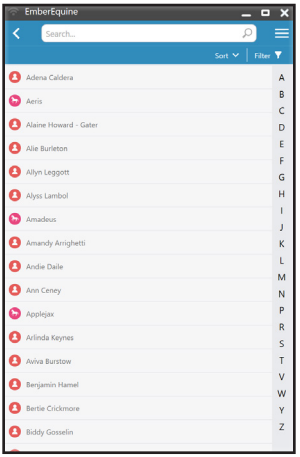
The new button appears in the menu, and prompts the user to select the type of data to enter. The software presents the form for entering the desired type of data.

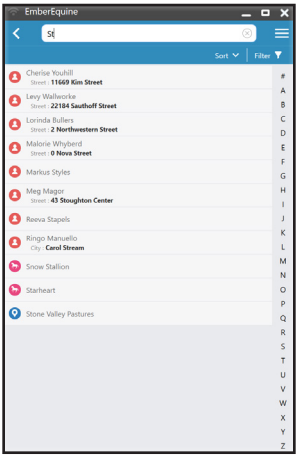
Using search

The search feature, available from the home screen or the hamburger menu, provides tools for sorting, filtering and viewing information in the clinic database.

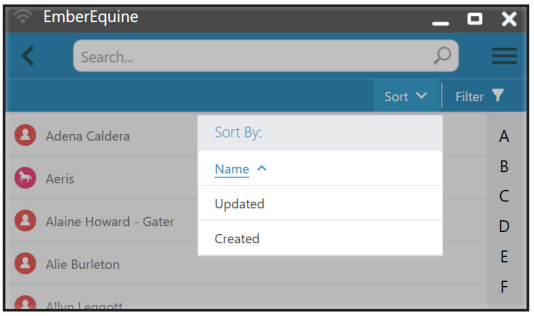
Enter a search string in the search box near the top of the window to find matching records. By default this searches all form types (e.g. contacts, animals, locations, etc.), showing records matching the search string. The screen shots below shows an example of using a search string to filter search results.

If you need to match a pattern, use the % character as a wildcard. For example, you would use a search string like "%son" to find names ending with "son."

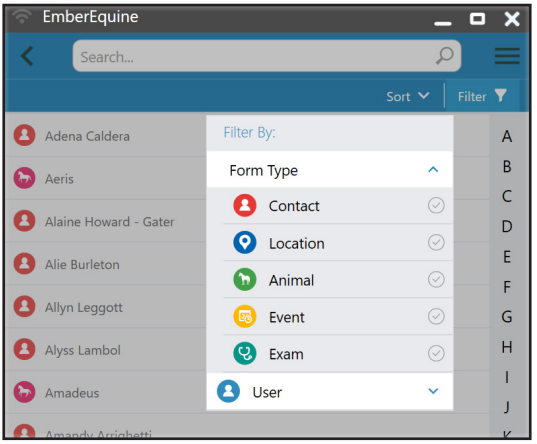




Use the sort menu to control the order of search results. In the search menu, choose a data field for sorting search results. Tap or click on the active sort field to toggle the sort order between ascending and descending. The screen shot below shows an example of results sorted by name in ascending order.

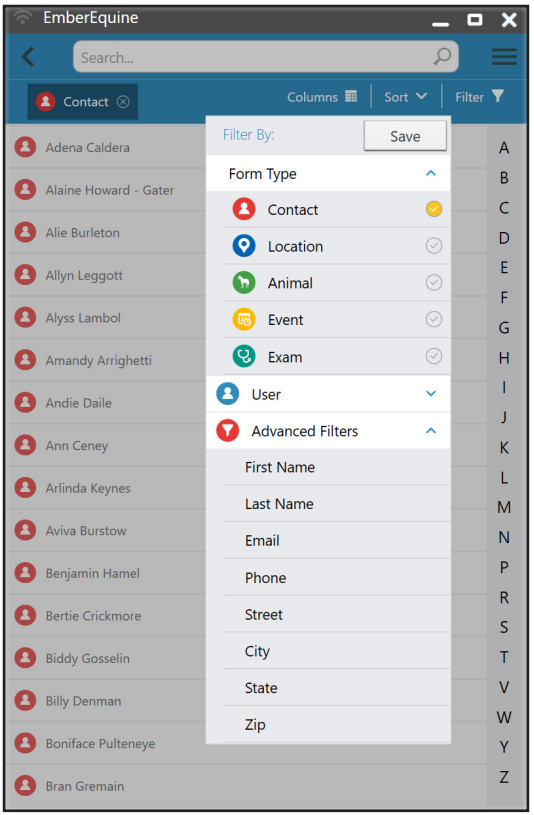


Use The filter menu to limit search results to a specific form type (e.g. contact, location, etc.). The screen shot below shows the filter menu.

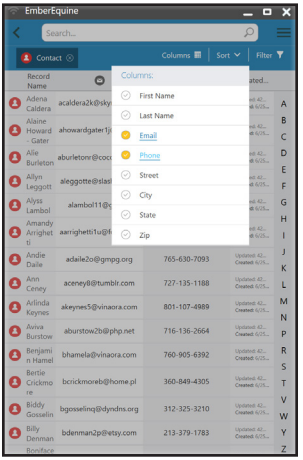


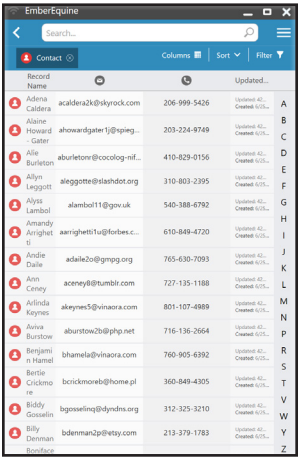
Apply a form type filter to enable more options on the search screen With a filter applied, the filter menu shows advanced filters and an option for saving the filter. In addition, the columns menu appears near the top of the search screen.

With advanced filters, you can apply more detailed search criteria based on the data stored in the form.



The columns menu provides options for showing additional columns of data. The following example shows this feature for contacts with additional columns for email and phone.

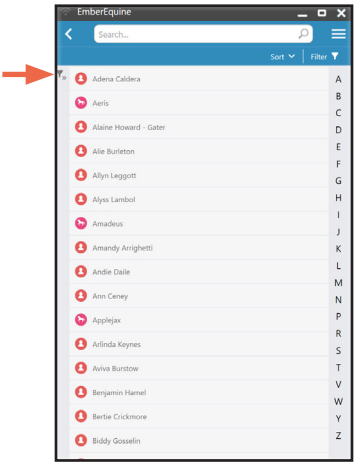


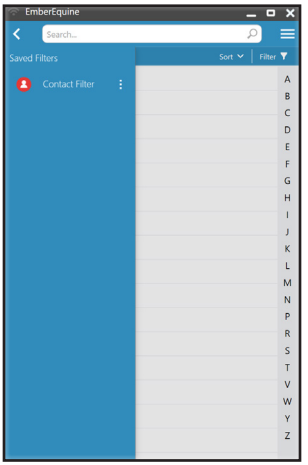


Once you have set all of the search criteria, columns, and sort order, use the save option in the filter menu to save the search to be used again in the future.

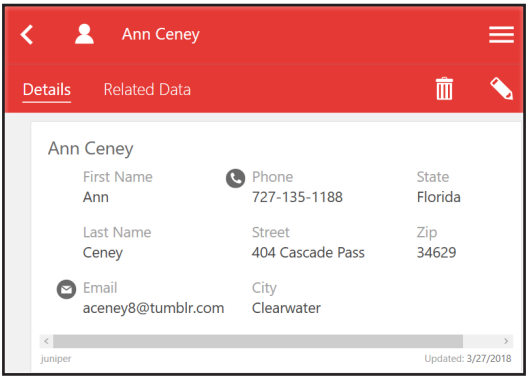
Use the icon on the left side of the search screen to access

the list of saved searches. Activate the saved search by tapping or clicking on the name of the search. You can edit the name of the search or delete the search by clicking the icon to the right of the search name. To edit the search criteria in a saved search, apply the saved search, modify the filter criteria, and then use the save button in the filter menu and either replace the existing search by using the same name or create a new saved search by using a different name.

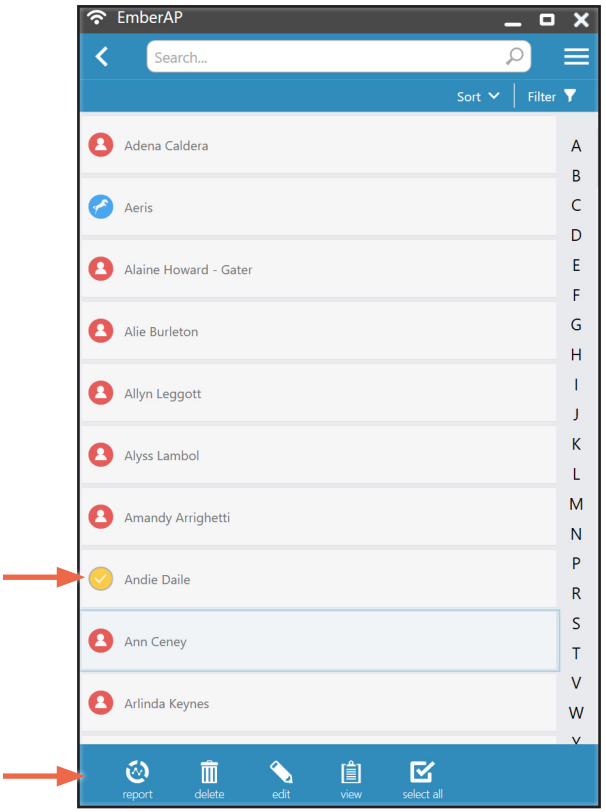




From the search screen, view the details of a record by tapping or clicking on the name of the record, and the software shows a screen similar to the screen shot that follows. Near the top right corner, the garbage can icon provides an option to delete the record, and the pencil icon provides an option to edit the record. Related data can also be accessed from this screen by choosing that option.



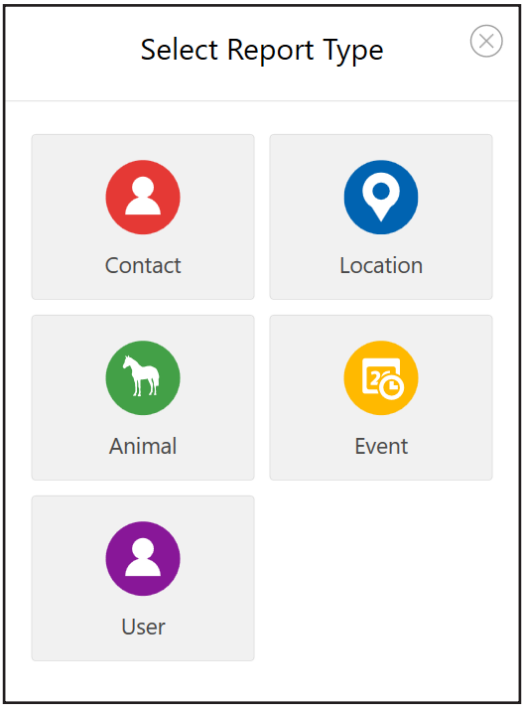
To perform other tasks on records, select one or more records by tapping or clicking on the icon to the left of the name of the record. When selected, the icon for that record changes to a check mark. With one or more records selected, a bar appears at the bottom of the screen with options to report, delete, edit, or select all. The delete option is available when one or more records is selected. To delete a record, you must first delete data related to that record. The report option is available when one or more record of the same type is selected. The edit and view options are only available when a single record is selected. The select all option is available to help select or deselect all of the records shown in the list. To delete a record, you must first delete data related to that record.



Using reports

The reports button appears on the home screen and in the menu. Use reports to export data to share.

Generate a report by using the report button and then selecting the type of report.

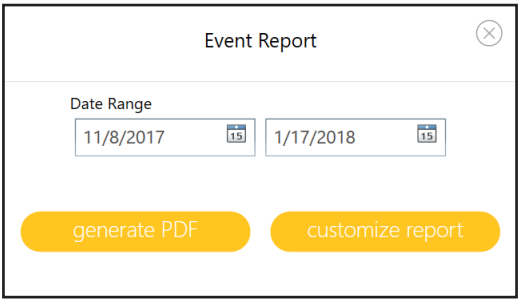


Reports for animal, location, contact, and user provide exam data collected in reference to the animal, location, contact, or user specified.

The user report is not available for offline (non-cloud) databases.

The event report provides a report of events scheduled for the specified date range.

After the required parameters are specified for the report, the software provides options to generate PDF or to customize report. The generate PDF option is an easy way to create a report in PDF format that is easy to share, and the customize report option allows you to choose other formats for the report such as html or csv, and these formats can be opened with Microsoft Word or Microsoft Excel.



Deleting records

When you try to delete a record, you may see a message telling you that related data must be deleted first. This means that another record in the database references the record you are trying to delete. For example, each exam record references an animal, and the software will not allow the animal to be deleted without first deleting all exam records related to that animal.

To find related data, use search to find the record you want to delete. View the details of the record by clicking on the record. Check for related records by clicking on "Related Data" near the top of the window. This screen shows the related records.