EQUIS REPORT

Committee – Janice Tyndall, Chris Gould, Jennette Coote, Louise Masek, Susan Jenkins, Ben Tyndall,

Introduction - contract overview - Janice
The Equis contract is a Software as a Service (SAS) contract that means we own our data, but have a license to use the software. It is a fixed cost flat fee (for five years) based on the number of members. At a cost of 10,000 Euros plus, depending added features. A fixed cost will improve our budgeting accuracy and should allow us to save money on the registrations and therefor hopefully add services through the reopening of our office.
Included in the contract at no additional cost, is the Horse Link pedigree exchange hub that will allow us to share pedigrees with other subscribed studbooks.

Transition from CLRC - Jennette
The change of the database from CLRC to Equis, that occurred January 1, 2022 had much background work done from August forward. The data base had to be transferred from CLRC to Equis, there were two data dumps that had to be processed and checked for accuracy. We have had weekly meetings with Equis staff solving any problems and working section by section through the process making sure everything works. The back office which is the operational center where Victoria will process applications, stud book placements, and process inspections is operational and continues to be adjusted as we go. The next step which is in process is the front office installation and making sure that all functions are working.   This is the section where the member can directly access their own files and where all pedigrees can be researched. It will also have the ability for the members to enter their own registrations directly and many other functions that were explained in the AGM pre-program.

Web Integration and implementation timelines- Chris
The CWHBA website will be integrated with the Equis studbook management system and will be the access point for members to login to the services and functions of the system. A public pedigree search access will also be part of the website integration as well as the stallion management and directory. Details of this aspect are yet to be determined.
Although we have not met our earlier expectations for implementation for member access our current priorities are:
- Public access to pedigree search number one priority -asap
- Member front office for online registrations – fully implemented no later than July 1.
- Stallion management – following front office implementation.

Operations/functionality - Victoria

The full system is accessed by what is called the back office. The CWHBA registrar works there with full access to all data and with the ability to customize some of the reports. At present paper applications are received by the office and the information is entered into the system. When both parents are in the system and all information is correct the process is very quick and seamless. The DNA hair sample when received is forwarded to Bureau Veritas for processing. Once the DNA results have been returned to the office, the certificate is printed and sent to the member. The turn around time is really only a function of the time of DNA

processing and the speed of mail service.

When one of the parents is not in the system there is additional time required to enter the pedigree and verify the information. Horse Link once operational will be a huge help here.

The front office is where members access the system. There they will be able to renew memberships and up date information about themselves and their horses, including deaths and sales. It is also where they enter data for a new registration. Once entered a DNA form will be generated with the horses name and number to accompany the sample. The data is verified by the registrar and invoice paid before the certificate is issued.

Conclusion – This is a brief overview. There are of course many features not covered in this report and there is much to do to fully maximize its potential. We are very pleased with the working relationship we have developed with the Equis staff. This is a state of the art studbook management system that is going to give our members timely service with a number of great features. After years of frustration and delays we are excited to get back to fulfilling our mandate to provide Canadian Warmbloods breeders with the tools and service to produce world class horses.