

Keeneland Portfolio

Documentation

October 17, 2010

Below is an example of the screen you will see after you log in to the Keeneland Portfolio. Each element is labeled with a number that corresponds to a section in this document.

The screenshot shows the Keeneland Portfolio web application interface. At the top left is the Keeneland logo and a navigation menu with items: 2010 November Breeding Stock Sale (2), Browse Sales (10), Alerts (11), Portfolio Access (12), Contact Info (13), Log Off (14), and Help (15). The main content area is titled 'Horses (57 entered)' (1) and contains a table with columns: Hip, Out, Consignor, Grade, Book/Session, Video, Keeneland Pedigree, Horse Name, Sire, Dam, YOB, Sex, Barn, and Updates. The table lists several horses, including Qu' Appelle, Fapindy, Alaazo, Aztec Pearl, Keep Me Informed, Money Queen, Between Raindrops, A P's Boomin Baby, Luminous Beauty, and Indycatfighter. At the bottom of the table are buttons for Comments (3), Delete (4), Keeneland Account (5), History (6), Export List (7), Add Horses (8), and Refresh (9). The footer contains the copyright notice: ©1999-2010 Keeneland Association, Inc. All Rights Reserved.

Hip	Out	Consignor	Grade	Book/Session	Video	Keeneland Pedigree	Horse Name	Sire	Dam	YOB	Sex	Barn	Updates
3364		Paramount Sales, Agent XVII		6 / 10			Qu' Appelle	A.P. Indy	Aly's Adita	1998	Mare	19	Updates
1138		Highclere Sales, Agent III		2 / 4			Fapindy	A.P. Indy	Aroz	1998	Mare	42	Updates
3283		Eaton Sales, Agent		5 / 9			Alaazo	A.P. Indy	Atelier	2005	Horse	11	Updates
0098		Middlebrook Farm, Agent		1 / 1			Aztec Pearl	A.P. Indy	Aurora	1999	Mare	1	Updates
3340		WinStar Racing, Agent		5 / 9			Keep Me Informed	A.P. Indy	Awesome Humor	2007	Colt	12 14	Updates
3207		Taylor Made Sales Agency,		5 / 9			Money Queen	E Dubai	Bail Money	2008	Mare	4	Updates
0663		Hill 'n' Dale Sales Agency, Agent		2 / 3			Between Raindrops	A.P. Indy	Beaucette	2007	Filly	30	Updates
3069		Hill 'n' Dale Sales Agency, Agent		5 / 9			A P's Boomin Baby	A.P. Indy	Boom Bird	2006	Mare	8	Updates
0431		Blandford Stud (Padraig Champion),		1 / 2			Luminous Beauty	A.P. Indy	Caertina (IRE)	1999	Mare	14	Updates
2839		Warrendale Sales		4 / 8			Indycatfighter	A.P. Indy	Cat Fighter	2006	Mare	3	Updates

1 Horse List

The heart of the Keeneland Portfolio is the Horse List, which you populate with horses from our upcoming sales using the Add Horses feature (see Section 8 for information). It will represent your “short list” of horses that you want to follow throughout the sale. You will be able to create your Horse List once the catalog is released online.

Information presented in the Horse List can be sorted by clicking on any column heading.

Clicking on the horse name will display that horse’s catalog page.

Clicking on the sire name will display all horses in that sale by that same sire.

Clicking on “Updates” will display the free Equine Line catalog update for that horse.

2 Sale Selector

When you log in to the Portfolio, you will automatically be taken to the latest sale available. You can use the Sale Selector to choose a different sale. If you had a list in a prior sale, you can go back and review your old lists. Please note, however, that you cannot create lists for sales that have already ended and you cannot revise lists from previous sales.

3 Comments



Enter A Grade/Comments for Hip 3364, foaled 1998 by Aly's Adita out of A.P. Indy

Grade:

Comments:

Save Cancel

After inspecting a horse, you can use the Keeneland Portfolio to document your evaluation. You can enter a grade and free-form comments for any horse by highlighting that horse and clicking the “Comments” button. The grade will appear on the horse list, so you can use it to sort your list. The comments will appear by accessing this screen again, or if you export your list to a CSV or PDF file (see Section 7).

Purchased Horses (3 records found)								
Hip	Out	Consignor	Horse Name	Sire	Dam	DOB	Sex	Sale Price
0280		Carley Stemmer, Agent		Dynaformer	Song of Sam	02/25/2010	F	325,000
0242		Stemmer Farm	Queen's Lady	Reignite	Tiara Girl	05/09/1997	M	500,000
0245		Cloverleaf Farm	Kendra	Medaglia d'Oro	Winning One	02/08/2006	M	250,000

Return
Print Results
Download CSV

The “Show Purchased Horses” button will display your purchases for the selected account in a sortable list. You can export this list as either a print-friendly PDF or a CSV for analysis in Excel.

Please note that any horses that have been transferred from your account will not appear on this list. We plan to allow you to view these transfers from this screen in a future update to the Portfolio. Information related to transferred horses is presently available by viewing a statement.

6 History

Sales History (25 records found)

Current Hip	Sale	Hip	Sire	Dam	DOB	Horse	Sex	Buyer	Sale Price
3364	1999-09	0667	A.P. Indy	Aly's Adita	05/31/1995	Hip 667	Filly	Winsong Farms (James Delahooke, Agent)	300,000
0431	2000-09	0571	A.P. Indy	Caertina (IRE)	02/11/1995	Hip 571	Filly	Moyglare Stud Farm	2,000,000
1062	2000-09	0118	A.P. Indy	Radu Cool	01/23/1995	Hip 118	Filly	Moyglare Stud Farm	2,150,000
0602	2001-09	0229	A.P. Indy	Meadow Star	01/29/2000	Hip 229	Filly	Padua Stables	470,000
3364	2002-11	0700	A.P. Indy	Aly's Adita	05/31/1995	Qu' Appelle	Mare	Ben Glass, Agent	245,000

Back Print Results Download CSV Statistics ▾

Clicking the “History” button will display the Keeneland sales history for all horses on your list. This screen will display the “Current Hip” (the hip number for the upcoming sale) and the “Hip” (the hip number for the horse when it sold previously) in a sortable format similar to the horse list.

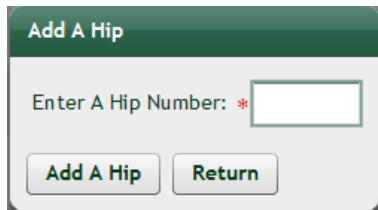
You can print the results to a PDF file, download a CSV for analysis in Excel, or view various statistics about the purchases shown in the history.

7 Export List

You can export your horse list in three ways:

- 1: Mini-Catalog. Selecting this option will create a PDF file containing the catalog pages for all the horses in your list in hip number order.
- 2: PDF. Selecting this option will create a PDF file containing your list in a printer-friendly format, in whatever order the list is sorted in at the time.
- 3: CSV. Selecting this option will generate a CSV file for analysis in Excel.

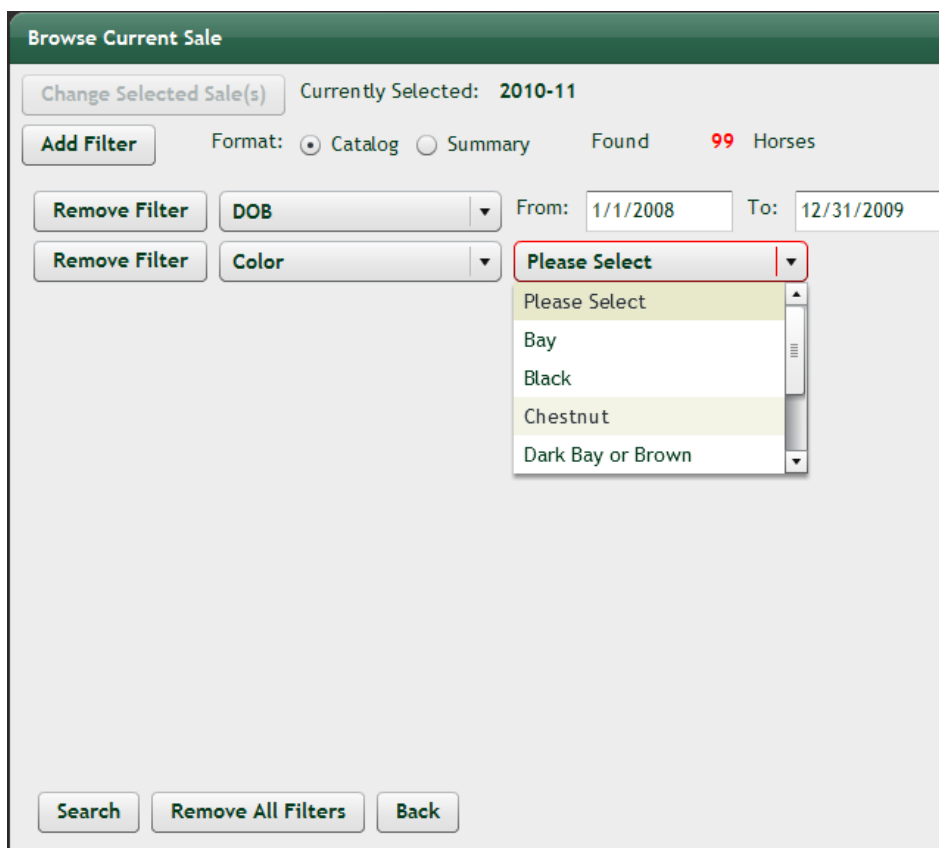
8 Add Horses



Add A Hip

Enter A Hip Number: *

You can add horses to your Horse List two different ways using the Add Horses button. Use the “Add A Hip” option from the “Add Horses” button to quickly add any hip from the sale. You can continue to add hips in this way until you click the “Return” button to exit the window.



Browse Current Sale

Change Selected Sale(s) Currently Selected: 2010-11

Format: Catalog Summary Found 99 Horses

From: 1/1/2008 To: 12/31/2009

- Please Select
- Bay
- Black
- Chestnut
- Dark Bay or Brown

Using the “Add Multiple Horses” option, you can search the current sales catalog for and apply different filters to identify specific horses. To get started, click “Add Filter” to create the first filter. Then, choose the filter type from the drop-down menu. Finally, choose the value you want to apply to the filter. (The red number at the top shows you how many horses match your filter(s).)

You can add several filters to find a specific group of horses. When you are ready to view the results of your search, click the “Search” button. (Choosing “Catalog” or “Summary” format affects what fields you see in the search results.)

Search Results											
	Hip	Sire	Dam	DOB	Horse	Sex	Consignor	Barn(s)	Book		
<input type="checkbox"/>	0347	Giant's Causeway	Turkish Tryst	05/11/2008	Bethan	Filly	Eaton Sales, Agent	20 21	1		Updates
<input type="checkbox"/>	0566	Storm Cat	Beaucette	01/24/2008	Sunset Colours	Filly	Hill 'n' Dale Sales Agency,	30	2		Updates
<input type="checkbox"/>	0590	First Samurai	In On the Secret	02/16/2008	Understated	Filly	Greenfield Farm (B. D. Gibbs Farm LLC),	23	2		Updates
<input type="checkbox"/>	0781	First Samurai	Hidden Reserve	04/17/2008	Intelligent	Filly	Claiborne Farm, Agent for Phipps	23	2		Updates
<input type="checkbox"/>	0876	Eddington	Watch the Time	03/28/2008	Promptness	Filly	Claiborne Farm, Agent	23	2		Updates
<input type="checkbox"/>	2083	Dixieland Band	Bejat	02/20/2008	Mrs Goldnorth	Filly	Highdere Sales, Agent V	26	3		Updates
<input type="checkbox"/>	2766	More Than Ready	Totally Crafty	02/25/2008	Fantastique	Filly	Paramount Sales, Agent LVI	44	4		Updates
<input type="checkbox"/>	2837	Lemon Drop Kid	Circle of Gold (IRE)	03/25/2008	I'm a Lady Too	Filly	Taylor Made Sales Agency,	48 49	4		Updates
<input type="checkbox"/>	2919	Hennessy	Ometsz (IRE)	05/03/2008	Hip 2919	Filly	Highdere Sales, Agent V	2	4		Updates
<input type="checkbox"/>	2955	Orienteer	Reinfree	05/01/2008	Rein Me In	Filly	WinStar Racing,	12 14	5		Updates

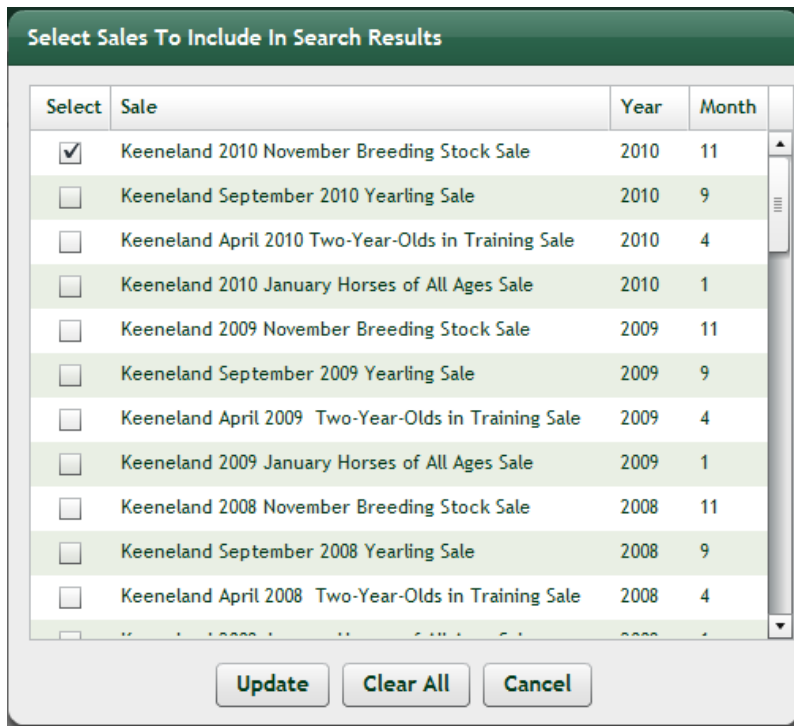
The search results will appear in a sortable format similar to the horse list.

You can add horses to your Horse List in two different ways. If you want to add all the horses from your search, click "Select" and choose "All," then click "Add To List." If you only want to add some horses to your list, use the check boxes on the left hand side of each horse to select the ones you want, and then click "Add To List."

9 Refresh

Clicking the “Refresh” button will reload the data for your list from our database.

10 Browse Sales



Select	Sale	Year	Month
<input checked="" type="checkbox"/>	Keeneland 2010 November Breeding Stock Sale	2010	11
<input type="checkbox"/>	Keeneland September 2010 Yearling Sale	2010	9
<input type="checkbox"/>	Keeneland April 2010 Two-Year-Olds in Training Sale	2010	4
<input type="checkbox"/>	Keeneland 2010 January Horses of All Ages Sale	2010	1
<input type="checkbox"/>	Keeneland 2009 November Breeding Stock Sale	2009	11
<input type="checkbox"/>	Keeneland September 2009 Yearling Sale	2009	9
<input type="checkbox"/>	Keeneland April 2009 Two-Year-Olds in Training Sale	2009	4
<input type="checkbox"/>	Keeneland 2009 January Horses of All Ages Sale	2009	1
<input type="checkbox"/>	Keeneland 2008 November Breeding Stock Sale	2008	11
<input type="checkbox"/>	Keeneland September 2008 Yearling Sale	2008	9
<input type="checkbox"/>	Keeneland April 2008 Two-Year-Olds in Training Sale	2008	4

Update Clear All Cancel

The “Browse Sales” feature works the same way as the “Add Multiple Hips” feature discussed in Section 8, but with two main differences:

- 1: You can search any sales back to July 1999.
- 2: You cannot add the results of your search to your list (since it may contain horses not in the upcoming sale).

To choose which sale(s) to search, use the “Change Selected Sale(s)” button at the top of the filter screen. From there, everything works the same.

11 Alerts

Alerts

When you select any alert, it will automatically be sent to the default destination(s) you have set.
To change an individual alert's destination, click the Change button.

Keeneland will not be responsible to buyer, owner or lienholder(s) for any damages (including actual, consequential or incidental) resulting from delayed receipt or non-delivery of any alerts or notifications requested via the portfolio service.

Select Default Destination(s) for Alerts:	Contact Info	Select Alerts:	Change Destination for Alert:
Text Message:		<input type="checkbox"/> Horse Taken Out	<input type="button" value="Change"/>
<input type="checkbox"/> (859) 288-4184		<input type="checkbox"/> Catalog Updates	<input type="button" value="Change"/>
E-Mail:		<input type="checkbox"/> Hip In Ring <input type="text" value="10"/> hips before	<input type="button" value="Change"/>
<input type="checkbox"/> rspaigh@keeneland.com		<input type="checkbox"/> Hammer Price	<input type="button" value="Change"/>
		<input type="checkbox"/> Summary/Buyer Info	<input type="button" value="Change"/>
		<input type="checkbox"/> Van Release	<input type="button" value="Change"/>
		<input type="checkbox"/> Vet Comments	<input type="button" value="Change"/>

“Alerts” will allow you to request Keeneland to notify you when certain events happen concerning the horses on your list. These alerts can be sent to any phone number (as a text message) or e-mail address you have added to your contact information (see Section 13). These alerts are:

- *Horse Taken Out*: a horse on your list is taken out of the sale, or an out horse on your list is put back in.
- *Catalog Updates*: a new catalog update is issued for a horse on your list.
- *Hip In Ring*: a horse on your list is within a certain number – configurable by you -- of horses from being sold, taking outs into account.
- *Hammer Price*: reports the high bid in the ring for a horse on your list.
- *Summary/Buyer Info*: reports the official summary information for a horse on your list, including buyer name and RNA.
- *Van Release*: a van release is issued **for a horse you have purchased (not a horse on your list)**.
- *Vet Comments*: vet comments are entered into the pavilion display system for a horse on your list.

12 Portfolio Access

User ID	Name	Email Address	Admin	Accounts	Alerts	Contacts	Export
rspaight	Ryan Spaight	rspaight@keeneland.com	▼	▼	▼	▼	▼

This screen allows you to manage access to your Keeneland Portfolio. You'll start out with a single admin user (this is the user you first log in with). It has full control to all areas of your Portfolio.

If you want to allow another user to have access to your portfolio, you can do so from this screen. Click the "Create New User" button to get started. (The next screen you'll see is covered on the next page.)

You can also edit an existing user using the "Edit" button (though you cannot remove any authority from the admin user) or delete an existing user using the "Delete" button (though, again, you cannot delete the admin user).

If you also use the Consignor Portfolio, you can view your users' access privileges to that system by choosing the "Consignor Portfolio" option at the top. If you don't use this system, you can safely ignore that option.

Create/Update Portfolio Access User
✕

User ID: *

Name: *

Email: *

Password: *

Verify Password: *

To view the password requirements, hover over the password box.

Consignor Portfolio

Accounts: <input type="checkbox"/>	Liens: <input type="checkbox"/>
Alerts: <input type="checkbox"/>	Papers: <input type="checkbox"/>
Contacts: <input type="checkbox"/>	Proofs: <input type="checkbox"/>
Entries: <input type="checkbox"/>	Repository: <input type="checkbox"/>

Keeneland Portfolio

Alerts: <input checked="" type="checkbox"/>
Accounts: <input type="checkbox"/>
Contacts: <input type="checkbox"/>
Export: <input checked="" type="checkbox"/>

Enter the desired User ID (you will be prompted to choose another if someone else is already using the ID you request), Name, Email and Password. Then, click the checkboxes for the Keeneland Portfolio features that you want this new user to be able to access. NOTE: the Consignor Portfolio features are only applicable to consignors and are not used in the Keeneland Portfolio.

After you click Save, the new user is ready to login with the permissions you have set up.

13 Contact Info

Contact Information (Ryan Spaight) ✕

Addresses (3 on file)			
Default	Type	Address	Description
<input checked="" type="checkbox"/>	Primary Business	4201 Versailles Rd	Physical Address
Phone Numbers (1 on file)			
Email Addresses (1 on file)			

This screen allows you to maintain your contact information so you can receive communications from Keeneland as you need to. You can set up multiple addresses, phone numbers, and email addresses.

Contact Information (Ryan Spaight)

Address Type: * **Primary Business** ▼

Description: Physical Address

Address 1: * 4201 Versailles Rd

Address 2:

City: * Lexington State: * **Kentucky** ▼ Zip Code: * 40510-9662

Country: * **United States** ▼

Default:

Send the following catalogs to this address
(P.O. Boxes only valid for April):

Catalogs: January April September November

Save **Cancel**

You can designate a “default” address, phone number and email address by using the checkbox as shown above. This will be the address Keeneland uses if in doubt about where a certain mailing should go.

In addition, you can specify to have up to one of each type of catalog sent to each of your addresses. If you need larger quantities, please contact the sales department.

Contact Information (Ryan Spaight)

New Email

Type: * ▼

Description: *

Email: *

Default:

Liens/Claims To Proceeds:

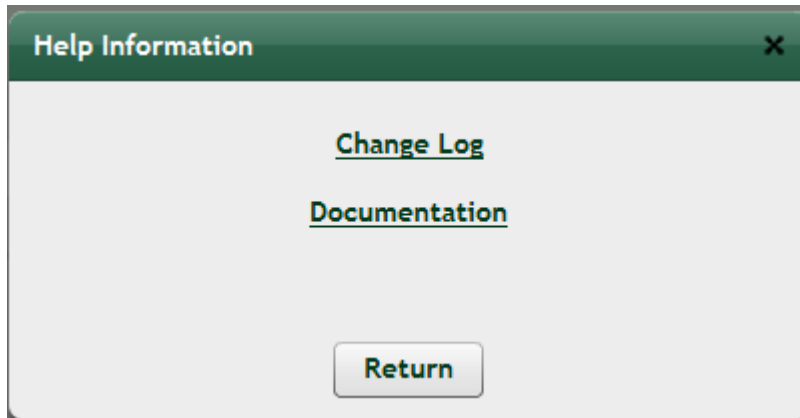
Save **Cancel**

For email addresses, you can specify an address for all lien/claim to proceeds related notifications by using the checkbox as shown above.

14 Log Off

Choose this to log off of the Portfolio. This is particularly important if you are using a shared or public computer.

15 Help



From here you can access a list of recent changes made to the Portfolio, as well as an updated copy of this documentation.