Studbooks-Adding Notes

Recording notes for an animal and the note types and definitions.

Contact SPECIES360 Support

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Recording Notes

Animal Notes can be recorded in your Studbook for two purposes:

- Capturing information that is not recorded elsewhere within the animal record.
- Providing further details on information that is captured within the animal record.

Notes can be added to your Studbook in two places:

- Animal Notes grid in the Animal Detail screen
  - o This is where information that is NOT captured elsewhere within the Animal Details boxes would be entered.
  - o Note Date and Note Type are required when adding a note.
  - o Note SubType is optional and the options are driven by what was selected for Note Type.
  - o Keyword is also optional.
    - ▪ A Keyword is a significant word or short phrase that indicates the content of the longer note. Using a Keyword allows you to find related notes quickly.

- Note box in any of the other data entry grids in the Animal Detail screen.
    - This is where you can provide further details on the record that is captured in the grid.
    - Note boxes are available for the following grids: Transactions, Parents, Taxonomy, Sex, Rearing, Contraception and Identifiers grids.
    - For these Notes there is no Note Type, Note SubType or Keyword options. Date of the Note defaults to the date used to record the data.
    - The Notes will not display in the grid where they are entered, they will all display in the Animal Notes grid (the bottom grid in the Animal Detail.
    - The Note Type, Note SubType and Keyword for these notes will display information from the grid where they were entered.
    - These Notes can be edited from the grid they were entered or from within the Animal Notes grid. An edit made in either location will change the note in both the Animal Note grid and the event grid.

Best Practices

Some Best Practices for your Notes include:
- Develop conventions for what Note Type and SubType will be used so you are consistent when adding notes for similar records.
- Develop a list of Keywords for consistency and to quickly search for notes.
- The first time you use an abbreviation or an acronym you may want to spell out what it stands for.
- Do NOT use texting or regional slang.
- Write in a professional manner using the correct terms.

Data Standards and Definitions

Below is an Excel file of the Note Types and SubTypes plus definitions. **Note this list is fluid and may change, it is updated as of the date stamp in the linked document.** To find a specific Note Type/Sub-Type, Definition or Global Sharing status in the attached below, click Ctrl+F (Apple+F) and search for the specific term.

Download Notes, Types Definitions and Global Sharing Status

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