



### **RECORDING BATCH ACTIONS**

How to save data entry time and avoid data entry errors with Batch Actions.

#### Contact <a href="mailto:support@Species360.org">support@Species360.org</a>

Batch Actions allow you to record the same, or similar, information in multiple animal records without having to open up each individual record. They obviously allow you to save data entry time. In addition, they can help reduce data entry errors as you don't have to retype the same thing over and over or cut and paste multiple times. This comes with the caveat that the data is entered correctly the first time to avoid having to do Batch Edits.

There are three ways to record Batch Actions:

- From Animal Lists
- From a Search Results Grid
- From Enclosure Occupants

### **Topics Covered**

Creating and Managing Animal Lists Batch Actions From Animal Lists Batch Actions From Search Results Batch Actions From Enclosure Occupants Editing Batch Actions Additional Time Savers

## **Creating and Managing Animal Lists**

Animal lists are helpful for recording the same data against a set of animals at once instead of doing it for each animal individually. Creating an Animal List means you do not have to search for the animals each time. In the Husbandry module, Animal Lists make Batch Actions very easy. For example, you may regularly train each of your seven armadillos and you want to record this all at once instead of entering the training information on seven individual animals every day. In the Medical module, Animal Lists can be used for Clinical Notes and Quick Prescription entries. For example, you are vaccinating your gazelle herd. Lists can also be used to help Staff search for the animals they are responsible for if they are organized by enclosures or strings.



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2	Vour animal lists	2 Bati	ch Measuremer	ts <sup>2</sup>		
	Please Select	-			~	
	Create new ani	mal list batch actior	1			
Pending	Transactions	By Othe	r Institutio	n <u>s (33)</u>		
- Last 30 c	lays (0)					
- Last 180	days (0)					
- Last 1 ye	<u>ar (0)</u>					
- Older the	an a year (33)					
Medical Reco	rds					
9 New 🗸   陷 E	dit 🗙 Delete [	E Manage	Animal Lists 🕶	🤁 Reloa	d medical list	
ashboard 🤣		Please Sele	ct	· · ·		
elect animal t	o see detail	🔶 Create	new animal list			
Records		Make a	simple batch a	ction 3		
Clinical r	otes					
Diagnos	es & Procedures					

Animal Lists can be created and managed from both the Husbandry and the Medical modules. All Lists will display in both modules.

From the Husbandry module select Animals > Your Animal Lists. (top)

From the Medical module select Medical Records > Manage Animal Lists. (bottom) Selecting the options here will actually bring you back into the Animal Lists in the Husbandry module.

To create a new animal list, select the "Create new animal list" option:

Freate New Animal List	×
Animal List Name	
kinkajous	
Select one or more Animals	
GAN: MIG12-29623864/Potos flavus × GAN: MIG12-29623869/Potos flavus ×	Q
☑ allow other users to edit this list	
	🚽 Save 🚫 Cancel

The Animal List Name must be unique within your facility - in this example, kinkajous. You then choose animals to add to it. You can either type in the GANS, the local IDs, the house names, or the transponders of the animals you wish to add, or you can click the magnifying glass to do a search and find them another way. Once you have selected the animals, you can choose whether or not to allow others to edit your list. This edit ability will apply to any Staff who have access to Animal Lists. By default, Animal Lists are shared.







The List will now appear in the dropdown. To use the List select it from the dropdown.

Sea	rch Ar	nimal	s By Identifier/C	GAN		23	Filter By Institution
>>	Stat	istics	Animal List: ki	nkajous * Ani	ima	l List: Asia 🗵	
	*	2	Actions - 🔶 Add	animal(s) to the li	st	X Delete selected	animals from list
		-	Record Batch Tra	ansaction	Þ.	House Name	Preferred ID
	7	-	Edit animal list name and privacy			[Marie/GREEN	[M18008/GREENVISC][1
	1					[Frank/GREEN	[M18006/GREENVISC]
		-	Service animal is	hunnesuren		[Anne/GREENV	[M18007/GREENVISC][4
		9	3FR10-00040	[B11001/GREE		[Fez/GREENVI	[B11001/GREENVISC][A
	1	01	AIG12-29858192	[880212/GREE		(Oscar/GREEN	[880212/GREENVISC]
	7	) I	RCH10-00075	[M14003/GREE		[Ella/GREENVI	[M14003/GREENVISC][9
	7	0 1	1SV17-00058	[M17001/GREE		[Arthur, junior (	[M17001/GREENVISC]
	V	0	/IG12-28443030	[M16031/GREE		Nelkan/BERLI	[M16031/GREENVISC][/

A results grid of the animals in the List will display. From the Actions button you can Record Batch Transaction, edit the List Name and edit ability (privacy) or delete the list. From the top of the list you can Add and Delete animals from the List.

If you want the lists to be automatically updated when animals die or are dispositioned, go to Institution Preferences > Application Preferences > Animal Lists and check the Enable auto-update of Animal Lists upon disposition checkbox. Going forward, this will remove animals from the lists when they die or are dispositioned. If you have dead or dispositioned animals on the lists when you check this, ZIMS will not automatically remove them. You will still need to add appropriate new animals to the list when animals are acquired or born/hatched.

Animal Lists can be used in:

- In <u>Animals Available</u> in My Institution, you can also share a list of animals. This provides a dynamic list of Animals Available to the global listing service because as the Animal Lists are updated, so is the AA listing. This functionality only works if all the animals on your list are the same species.
- When creating Templates in the <u>Care and Welfare</u> module you can select an Animal List. This module helps you quickly capture information on your animals' mental and physical wellbeing.
- The Daily Report can also be run from an Animal List.

## Back to Topics Covered

## **Batch Actions From Animal Lists**

## To create Batch Actions from your Animal Lists, open the list to the results grid.



S	Statistics Animal List: kinkajous 🗷 Animal List: Asia 🗵							
<b>R</b>	Actions - Add animal(s) to the list X Delete selected animals from list Medical BCS batch entry?							
		Record Batch Tra	ansaction 2	Notes		3	Scientific Name	Com
	4	Edit animal list na	ame and privacy	Single entry f	or all Animals	try for each animal	Ailurus fulgens f	Red
	4	Delete animal list			1		Ailurus fulgens f	Red
	6	113410-00121	INTOWNORCE	Anne/GREENV	[M18007)	Individual	Ailurus fulgens f	Red
	ω	BFR10-00040	[B11001/GREE	[Fez/GREENVI	[B11001/GREENVISC][A1	Individual	Polyplectron na	Pala
	$\odot$	MIG12-29858192	[880212/GREE	[Oscar/GREEN	[880212/GREENVISC]	Individual	Symphalangus	Sian
	$\odot$	RCH10-00075	[M14003/GREE	[Ella/GREENVI	[M14003/GREENVISC][9	Individual	Symphalangus	Sian
	$\odot$	HSV17-00058	[M17001/GREE	[Arthur, junior (	[M17001/GREENVISC]	Individual	Symphalangus	Sian
<b>V</b>	$\odot$	MIG12-28443030	[M16031/GREE	[Nelkan/BERLI	[M16031/GREENVISC][A	Individual	Panthera pardu	Amu
	6	12-29518711	[M16028/GREE	[Sheila/GREEN	[M16028/GREENVISC][B	Individual	Pongo abelii	Sum
<b>V</b>	$\odot$	MIG12-29931752	[M15008/GREE	[Bebe/GREENV	[M15008/GREENVISC][9	Individual	Callosciurus pre	Prev
	$\odot$	MIG12-29524237	[M11005/GREE	[Jade/GREENV	[M11005/GREENVISC][30	Individual	Panthera pardu	Amu
<b>V</b>	$\odot$	HSV15-01859	[M15007/GREE	[George/GREE	[M15007/GREENVISC]	Individual	Symphalangus	Sian
V	$\odot$	HSV18-00131	[M18010/GREE	[Adira/GREENV	[M18010/GREENVISC][11	Individual	Pongo abelii	Sum
<b>V</b>	$\odot$	MIG12-29858215	[M08005/GREE	[Scarlett/GREE	[M08005/GREENVISC][3	Individual	Ailurus fulgens f	Red
<b>V</b>	$\odot$	MIG12-30018353	[M16025/GREE	[Brianna/GREE	[M16025/GREENVISC][6	Individual	Pongo abelii	Sum

1.All animals are checked by default. Uncheck any records that you do not want to perform the Batch Action on.

2.Select Record Batch Transaction from the Actions menu.

3.From the drop down, select the Actions you wish to take.

4.Select Single Entry for all Animals (the same data will be entered in to each record) or Custom Entry for each Animal (each entry is editable so different data can be recorded in each record).





## Single versus Custom entry

Add New Notes	Add New Notes
This transaction will be recorded for 4 animal(s) in your Birds Education list.	This transaction will be recorded for 4 animal(s) in your Birds Education list.  1 of 4 Include Animal Local IDs in Note Species360 GAN:MIG12-29858219 Local ID:/YEA022/GPENVISC1
Note Date *	Taxonomy:Pyrrhura molinae / Green-cheeked conure
Note Type * Please Select	Note Date *
Note Sub Type Please Select	Keywords 🛛
Note	Note Type * Please Select
🖗 Note Templates 💌 🛞 🛃 💸	Note Sub Type Please Select
$\mathbf{B}  \mathbf{I}  \underline{\mathbf{U}}  \mathbf{ABC}  \underline{\mathbf{A}}  \mathbf{v}  \underline{\mathbf{W}}  \mathbf{v}  \mathbf{Q}  \mathbf{H}  \mathbf{H}  \mathbf{H}$	Note           Image: Note Templates         Image: Optimized State         Image: Optimized St
🖙 🔅 🌄 🗖	B I ∐ ARC A ▼ 🥙 ▼ 📿 🗄 🗄
	ခေ နှိန် 🥰 🔫 🗐
🛃 Save 🖉 Save & Repeat 🚫 Cancel	🛃 Save 🚫 Cancel

For the left hand screen above we have selected a single Entry for all Animals. Note that the number of animals is displayed and you have a Save and a Save & Repeat option. Whatever you enter in this screen will be duplicated in all records. For the right hand screen, we have selected Custom Entry for all Animals. The number of records still displays but now there is an indication of which record you are in. There is only a Save button and this will take you into the next record. What you recorded in the previous record will display in the following record but it is editable before you Save.

Some screens have the option to Include Animal Local ID in the Note field. If this is selected it is highly recommended that you record the text BEFORE the automatic note regarding the Local IDs to allow the actual text to display first in the Notes grid.

Also from the Animal Lists tab you can select Make a Simple Batch Action without selecting an Animal List.

2	E Your animal lists	
		~
<u>y?</u>	🔶 Create new animal list	
pe 🔺	S 웹페 Make a simple batch action	ast Repo
	Ailurus fulgens f Red panda Female	GREENV

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Simple Batch Action Medical BCS	batch_entry?	×
Select animals	M11005/Panthera pardus orientalis/Amu × B11006/Aratinga solstitialis/Sun conu × 880213/Pithecia pithecia/White-faced ×	
Number of Specimens	3 2	
Select transaction type	Alert 3	
	4	
	🚔 Single entry for all Animals 📲 Custom entry for each animal 🚫 Ca	ncel

1.Select the animals by entering GAN, Local ID or other Identifier or use the lookup field.

2. The Number of Specimens will display.

3.Select the Transaction Type.

4.Select Single Entry for All Animals or Custom Entry for all Animals.

The data entry screens will function as <u>described above</u>.

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## **Batch Actions From Search Results**

You can also perform Batch Actions from search results grids. Use Animal Simple Search or Animal Advanced Search to create your desired results grid. Unlike Animal Lists where all records are checked by default, no records will be checked by default in an Animal Search. Check the records you want to record the Batch Action on. You can check all records by checking the top checkbox.

8	Statistics A	nimal List: Birds Educ	ation 🗵 🛛 Animal Li	ist: Asia 🗵 🖌 Sear			
	E Actions for selected animal(s)						
	Africa		▼ ¥ Add	mal Type Sci			
	🔶 Create net	/ animal list (for selec	ted animals)	ividual Po			
		ividual Ailu					
	្អីត្រូ Make a sin	ple batch action (for	selected animals)	ividual Ha			
	Open sele	ted animal(s)		ividual My			
	E 🕢 HSV10	<u>،-00</u> [Laura/GR	[RES028/G	Individual Pa			
	E 🕢 HSV10	<u>-00</u> [Baby/GRE	[RES029/G	Individual Pa			
	E 🕢 HSV10	<u>-00</u> [Pat/GREE.	[RES024/G	Individual Pa			

Under Actions select Make a Simple Batch Action (for Selected Animals).

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1. The animals selected will display. You can also add additional animals or delete if incorrectly selected.

2. The number of records will display.

3.Select the desired Batch Action.

4.Note that for some action Types, such as Add/Assign Transponder, they do not have a Single Entry option because it is not logical to record the same data in all records.

The screens will function as described above.

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## **Batch Actions From Enclosure Occupants**

You can also record Batch Actions from the Enclosure Occupants tab. Open the Enclosure record from the Enclosure Tree or a search. The Occupants tab will display the current occupants of the enclosure. If you want to view Occupants of sub enclosures, open the Search Form and select Include Sub Enclosure. You can also use this form to find historical occupants, taxonomies and move in or out date ranges. Check the records you want to record the Batch Action on and select Simple Batch Action.





Enclosure Tree View 🗵 Primate Row 🗵						
Details More Details Occupants						
Search Form						
Animal ID	Search local animals	P Show	Historical Records			
Taxonomy	Search Taxonomy	P Inclu	de dead and lost to follow u	ıp		
Date In Range	From Date 🖪 To Da	ate 📑 🔽 Inclu	de Sub Enclosure			
Date Out Range	From Date 🔳 To Da	ate 🔳				
🕫 Clear Filter						
🍣 📓 🧣 📲 Simple Bat	ch Action					
Preferred ID	Common Name	Scientific Name	Sex Type	Status		
[XCA061/GREENVISC] [9	Black-headed spider mon	Ateles fusciceps rufiventris	Female	Alive		
XCA059/GREENVISC] [7	Black-headed spider mon	Ateles fusciceps rufiventris	Female	Alive		
M10008/GREENVISC] [1	Colombian Black Spider M	Ateles fusciceps robustus	Male	Alive		
[M12002/GREENVISC] [1	Schmidt's monkey	Cercopithecus ascanius s	Male	Alive		
M11007/GREENVISC] [1	Black-and-white ruffed lemur	Varecia variegata variegata	Male	Alive		
M11009/GREENVISC] [1	Black-and-white ruffed lemur	Varecia variegata variegata	Male	Alive		
[M16026/GREENVISC]	Black-and-white colobus	Colobus angolensis palliates	Female	Alive		
[M15010/GREENVISC] [M	Black-and-white colobus	Colobus angolensis palliates	Female	Alive		
[1/GREENVISC]	Black-and-white colobus	Colobus angolensis palliates	Undetermined	Alive		

Select the Transaction Type and a Single or Custom entry. The screens will function as <u>described</u> <u>above</u>.

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## **Batch Editing**

## Notes and Observations, Enrichment and Training sessions:

When creating records using a batch action with the option of single entry for all animals, you can edit the individual record afterwards.





Simple Batch Action Medical_BCS_	batch_entry?	×
Select animals	ISS17-00508/[Nugget/SPECIE360] × ISS17-00509/[R2-D2/SPECIE360] ×	
Number of Specimens	2	
Select transaction type	Training Session	
	Single entry for all Animals	ncel

When editing the record, you will see the option to edit for the entire batch or for the individual.

	Edit Note		×	liet This note add
	Note Date *	04/Mar/2021		all
	Keywords 🥠			ell with the softer
	Note Type *	Activity Level	×	967, 13968, 1396
	Note Sub Type	Please Select	*	
Batch No	te Save			×
This note note?	e was created from a ba	tch entry. Do you want to update the	entire batch of notes,	or only this had
	E	ntire batch Only this note Cance	el	pital
	UPDATE			irt, just remained
				vious batch. Brou Toronto
				isual as they wer
			🚽 Save 🚫 Cancel	h left about 1/3 o hungry compared

If you choose to edit for "Only this note" you will see the following:

Warning	1	×
?	Note will be excluded from any future batch edits. Do you wish to continue?	C
	Yes No	t.

This individual record will be excluded from future batch edits.

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Note on data entry monitoring. If you edit an individual record but then use data entry monitor to roll back the original batch entry, the individually edited entry will also roll back. If you roll back the individual edit, this will revert to being a part of the batch record.

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# **Additional Time Savers**

In addition, Batch Actions are available in <u>Accessions</u>. Creating Templates also helps you to quickly capture information with Batch type actions. See <u>Aquarist Daily Log</u>, <u>Animal Measurements</u> and <u>Husbandry Log Templates</u> for further information.

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