RECORDING BATCH ACTIONS

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

Contact support@Species360.org

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

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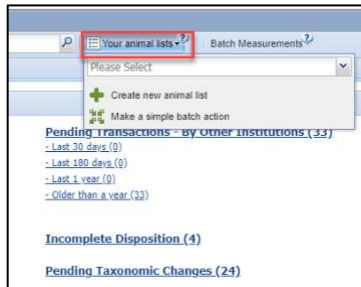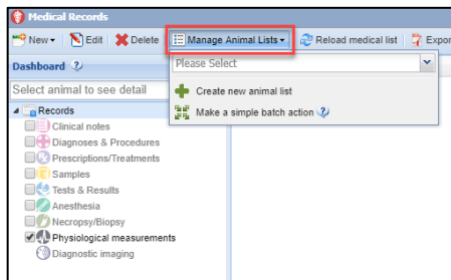
Animal Lists can be created and managed from both the Husbandry and the Medical modules. All Lists will display in both modules.

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:

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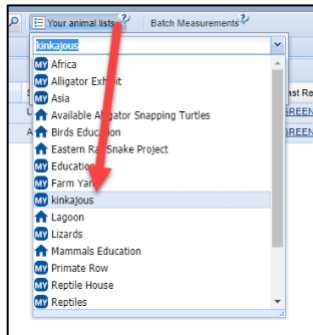
The List will now appear in the dropdown. To use the List select it from the dropdown.
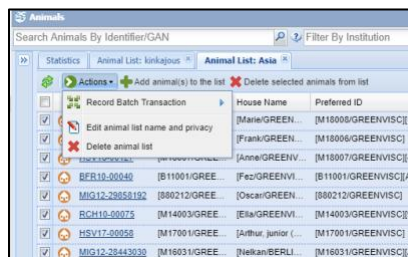
A results grid of the animals in the List will display. From the Actions button you can Record Batch Transaction, edit the List Name and edit ability (privacy) or delete the list. From the top of the list you can Add and Delete animals from the List.

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.
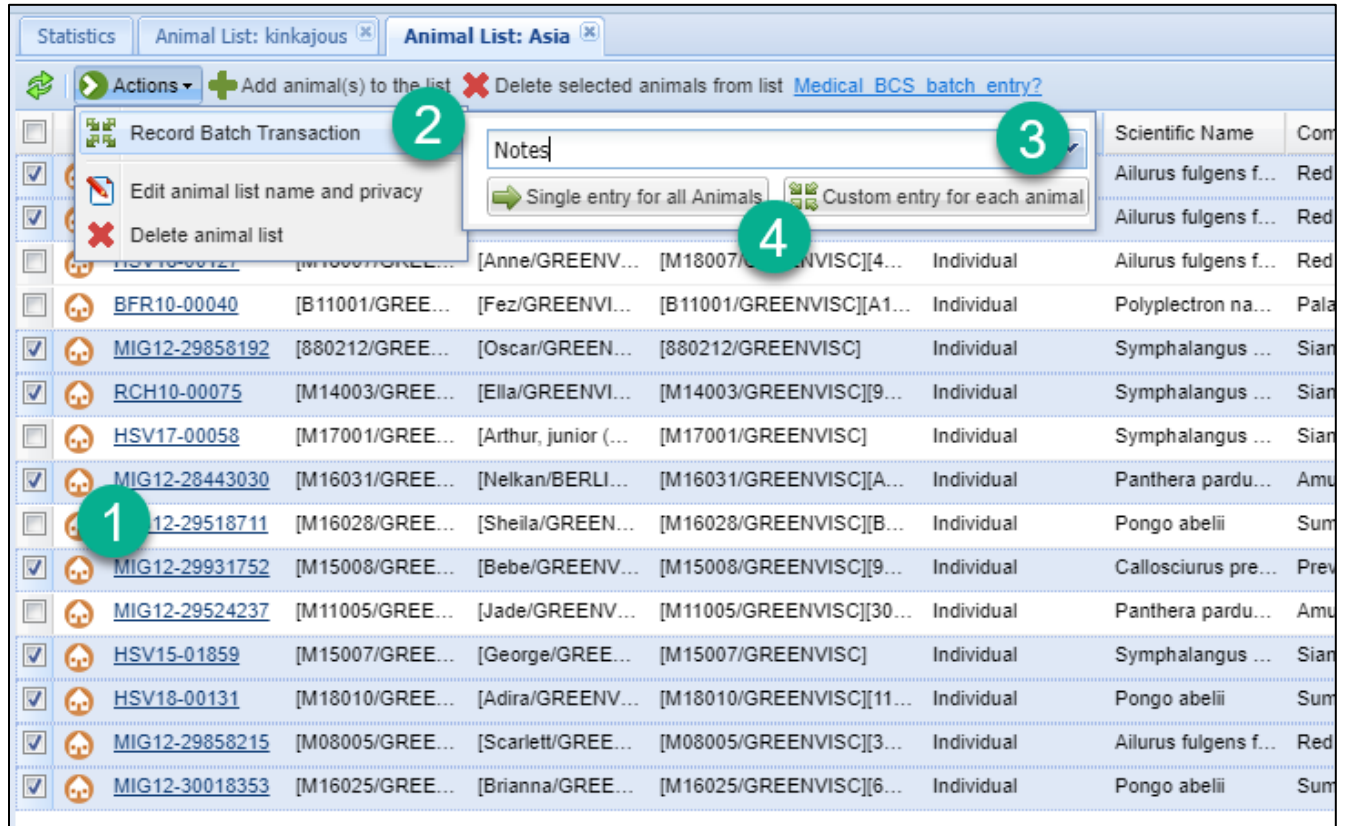
Animal Lists can be used in:

- In Animals Available 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 Care and Welfare 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.

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

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
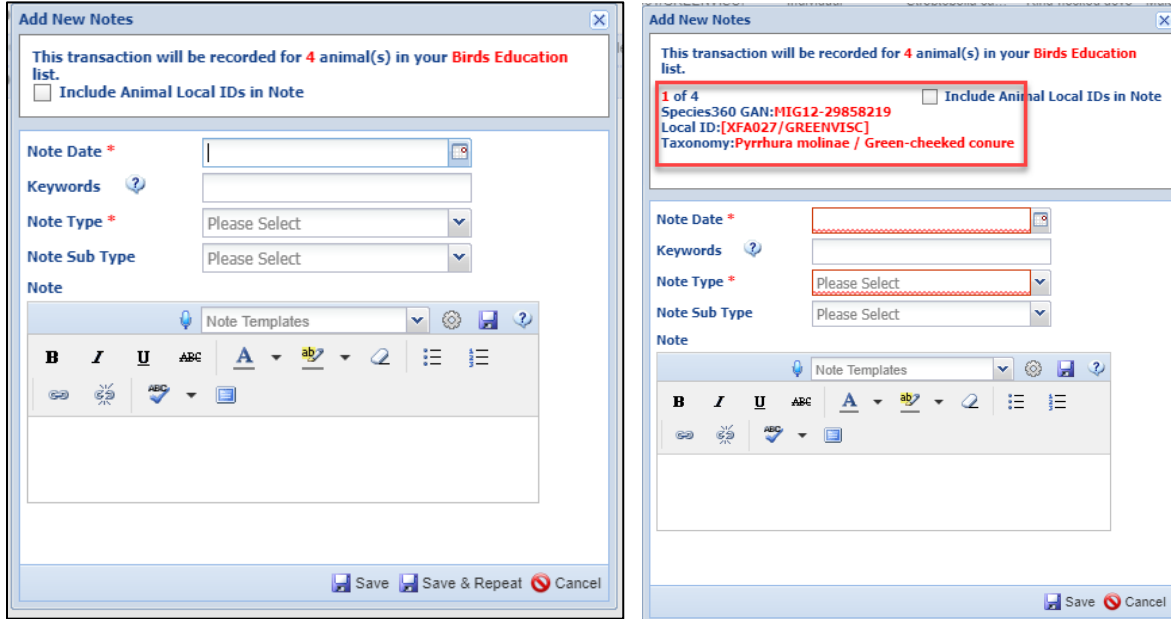
For the left hand screen above we have selected a single Entry for all Animals. Note that the number of animals is displayed and you have a Save and a Save & Repeat option. Whatever you enter in this screen will be duplicated in all records. For the right hand screen, we have selected Custom Entry for 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.
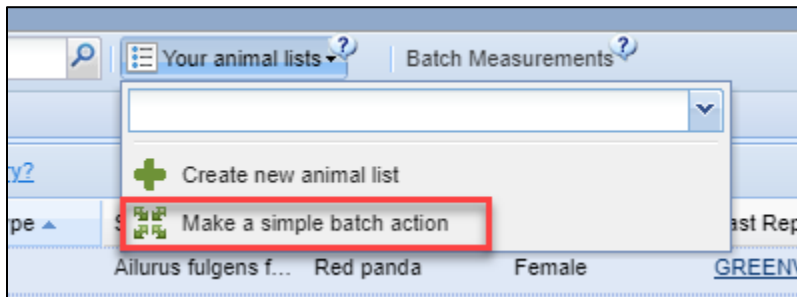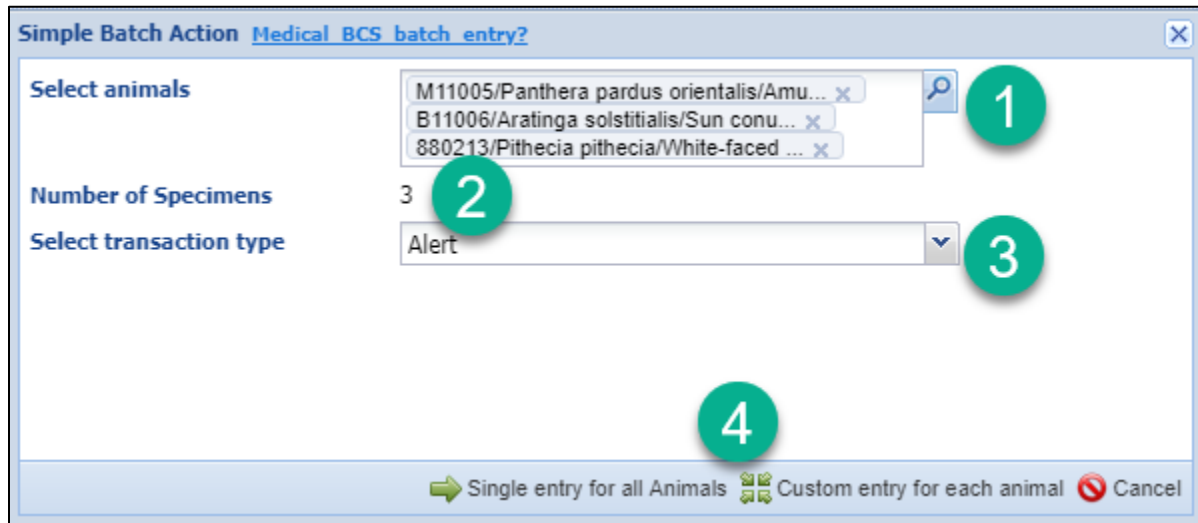
1. Select the animals by entering GAN, Local ID or other Identifier or use the lookup field.
2. The Number of Specimens will display.
3. Select the Transaction Type.
4. Select Single Entry for All Animals or Custom Entry for all Animals.

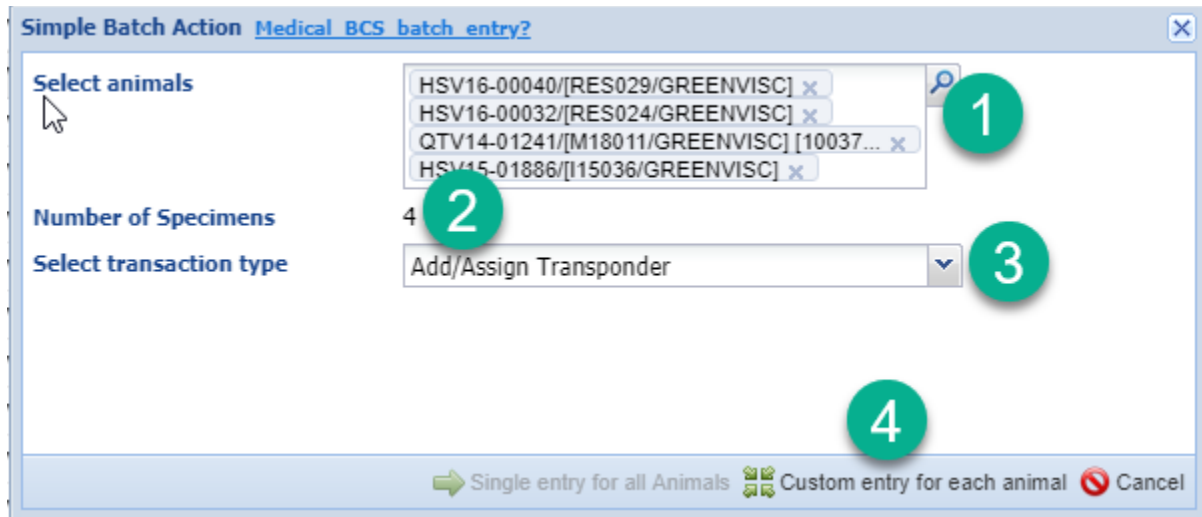The data entry screens will function as described above.

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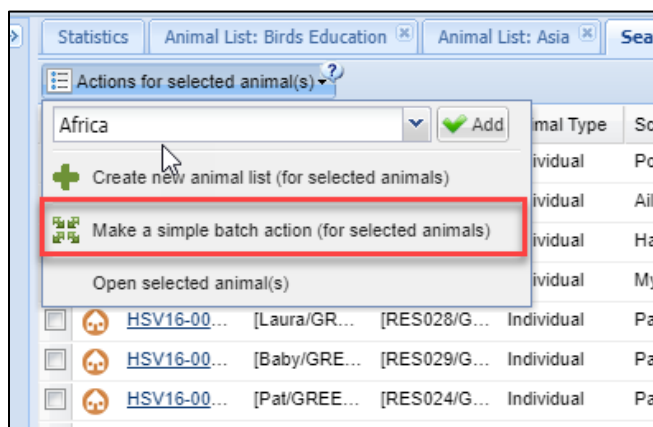
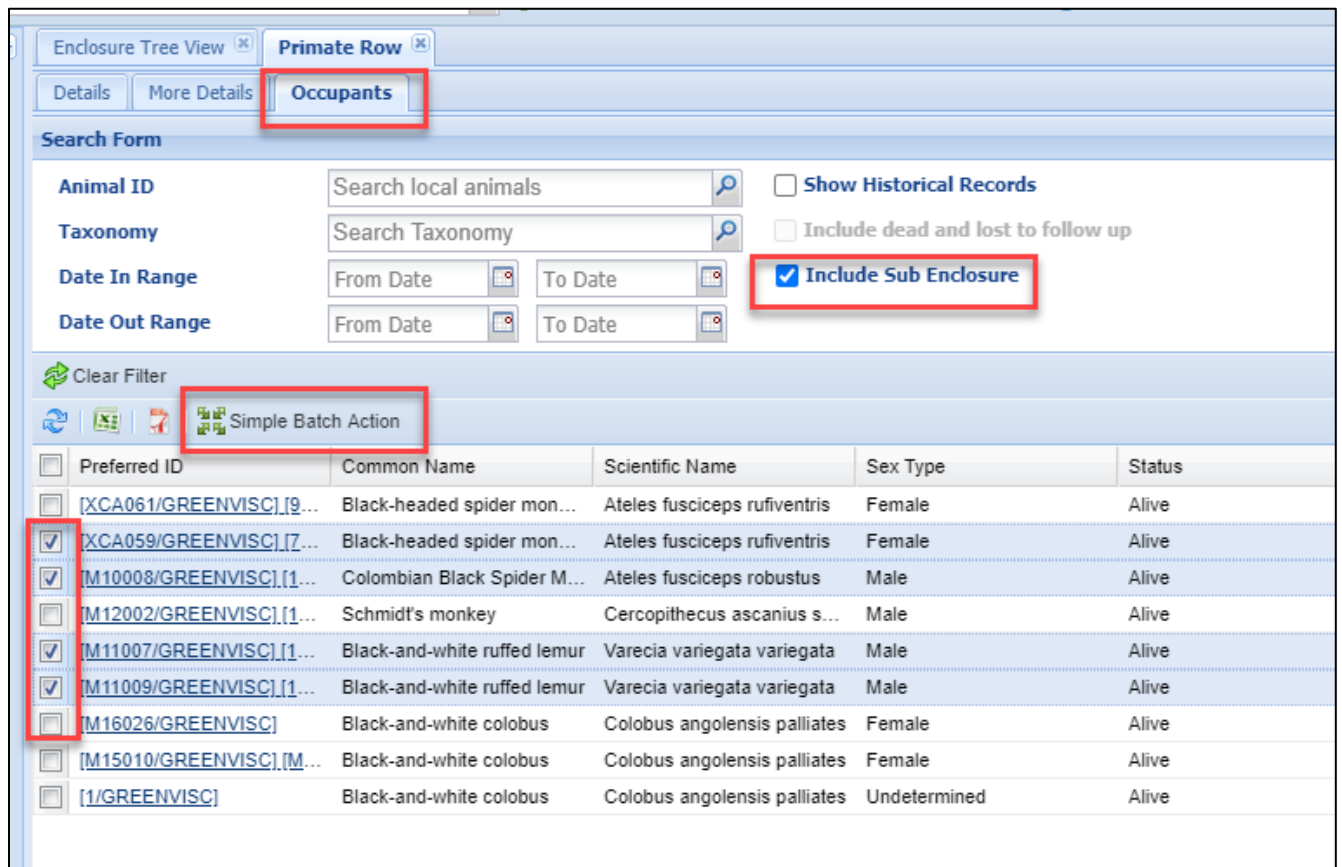Under Actions select Make a Simple Batch Action (for Selected Animals).

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.

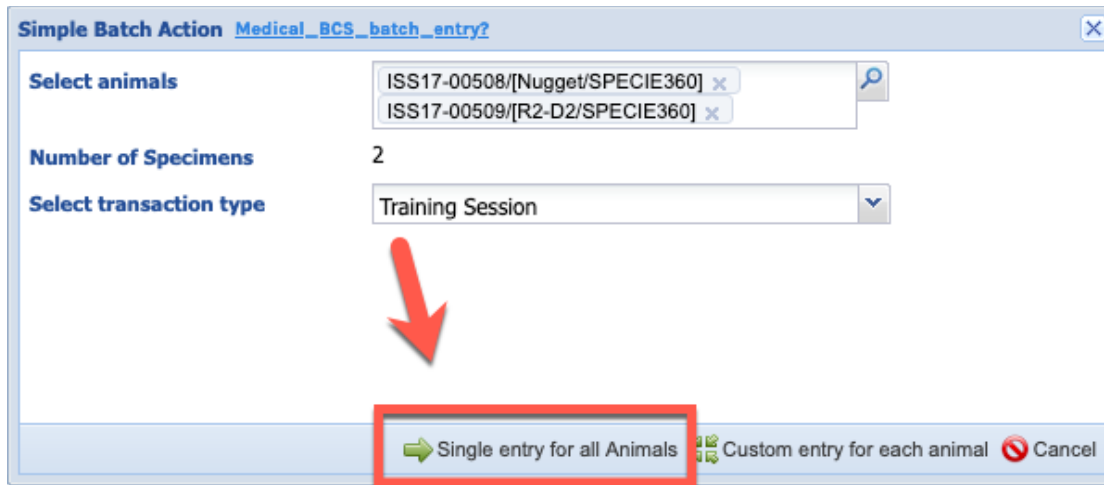Select the Transaction Type and a Single or Custom entry. The screens will function as described above.

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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.

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When editing the record, you will see the option to edit for the entire batch or for the individual.
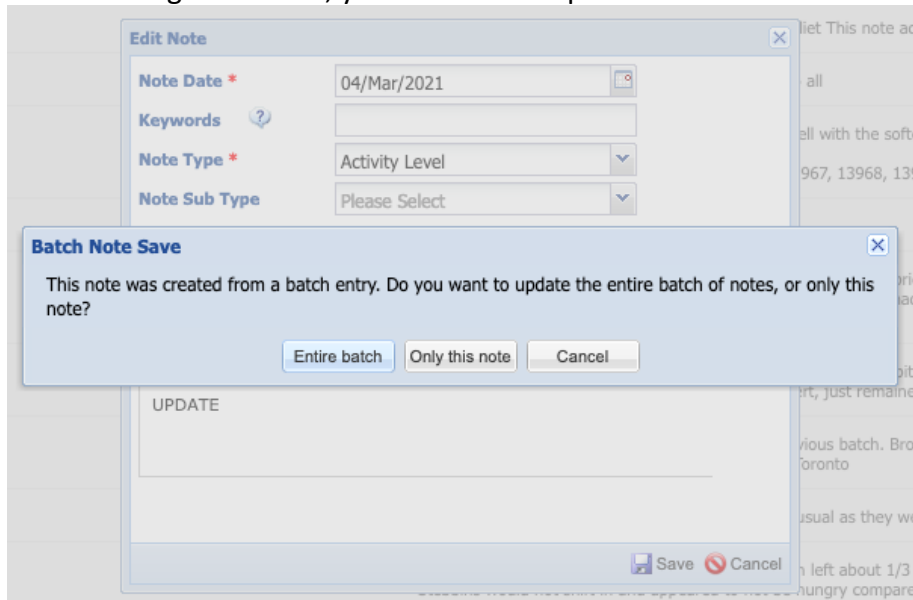
If you choose to edit for "Only this note" you will see the following:

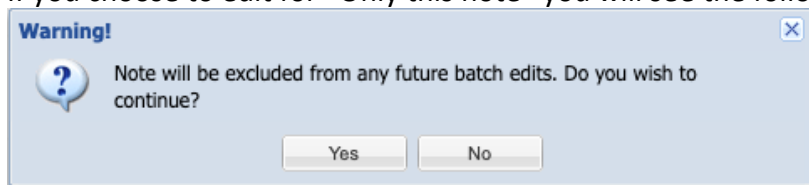This individual record will be excluded from future batch edits.

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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 Accessions. Creating Templates also helps you to quickly capture information with Batch type actions. See Aquarist Daily Log, Animal Measurements and Husbandry Log Templates for further information.

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