

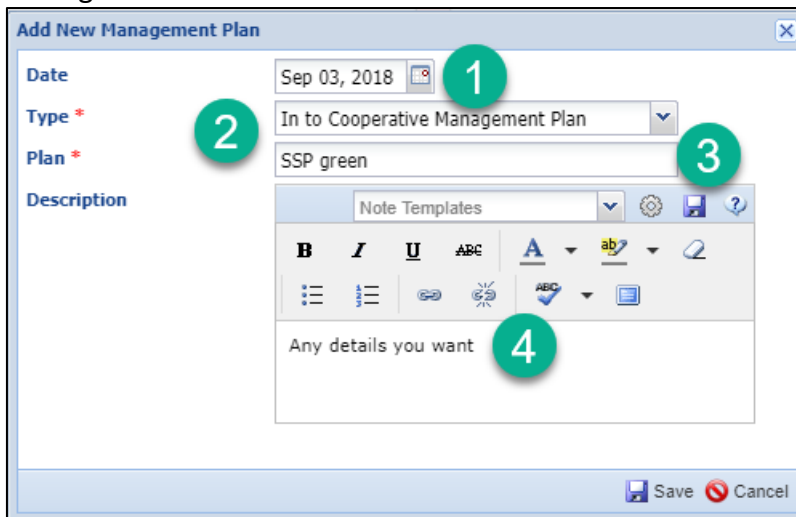
Adding and Using Management Plans

How to add animals into a Management Plan and searching for your Plans

[Contact SPECIES360 Support](#)

This functionality allows you to indicate any animals in your collection that are under an organized Management Plan. You can then search by Management Plans to find them. The examples given here will be using the AZA color-coded Management Plans. And to keep it simple we are using only one animal.

To add an animal to a Management Plan, open the appropriate record > More Details > Management Plan > Actions > Add New.



1. The Date is not mandatory but if you keep it blank it will default to 1 January 1900. There are a few options that you can use for initial recording of dates and you should be consistent with what you select.

- You can use the date that you are recording the information.
- You can use the date that the Management Plan was established. This may be hard to determine and, if established before you received the animal you will get a message that you did not have the animal at the time.
- You can use the date you acquired the animal (either birth/hatch date or acquisition date). In our example we used the birth date.

2. The Type is a data standard dropdown containing the following Terms:

- In To Cooperative Management Plan (in most cases this will be your first entry)

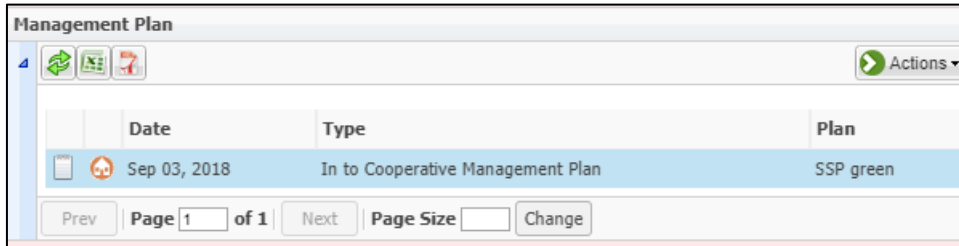
It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- No Longer Surplus To (as per the program manager)
- Out of Cooperative Management Plan (as per the program manager)
- Surplus To (as per the program manager)

3.The Plan is a free text field. Think about how you want to retrieve this information before entering. The AZA Species Survival Plans receive color designation depending on viability of the captive population. Our convention is to start with “SSP” and follow it with the color designated to the species. Later on, this will allow you to retrieve either all SSPs or by all SSPs with a specific color designation. Our species has a green designation.

4.The Description box allows you to enter any details you want. One idea is to enter who your Institutional Representative is for the species.

Select Save and the Management Plan information will display in the grid.

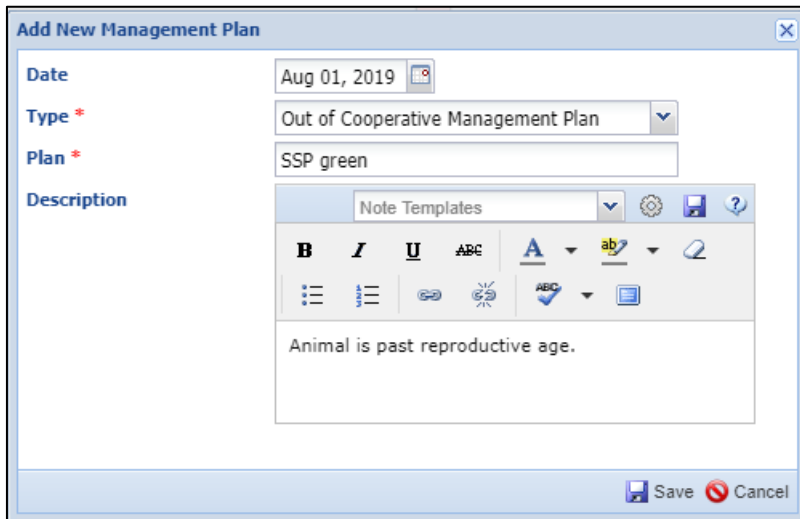


Date	Type	Plan
Sep 03, 2018	In to Cooperative Management Plan	SSP green

You have two options when you want to change the Type.

- You can edit the original entry. Be aware that no history will be retained if you use this method.
- You can add a new entry. This approach will maintain a history of the animal’s involvement with the Plan.

Our animal is now past reproductive age and the Program Manager has removed it from the managed set of animals.



Add New Management Plan

Date: Aug 01, 2019

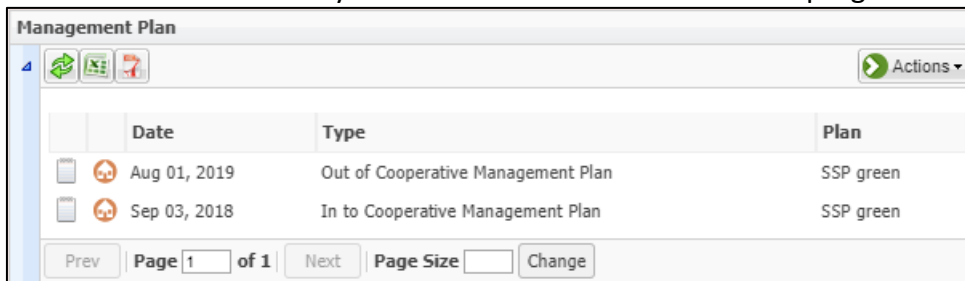
Type *: Out of Cooperative Management Plan

Plan *: SSP green

Description: Animal is past reproductive age.

Save Cancel

You can now see a history of the animal’s involvement in the program.





Date	Type	Plan
Aug 01, 2019	Out of Cooperative Management Plan	SSP green
Sep 03, 2018	In to Cooperative Management Plan	SSP green

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Include births in Groups


Collection Include Historical 

Please Select 

Enclosure Responsible Party

Please Select 


Enclosure

Search for Enclosure 

Include Sub Enclosure

Search in Notes


Shipping Company

Please Select 

Birth Location


Nest ID



Management Type

Please Select 

Management Plan

Responsible Party

Please Select 

 Reset  Search

To search for animals in Management Plans, open Advanced Animal Search and scroll down to the bottom. You can search by Management Type or Management Plan. For our example, if you select Plan = SSP, it will find all animals that are managed as SSPs. If you select Plan = SSP green, you will find animals with only green designations for SSPs.

Revised 2 September 2019