Adding Notes & Observations

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Recording notes and/or observation for a specimen and the terms, definitions, and global sharing status.

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Recording Notes & Observations for a single record

To record a note or observation for an animal record, go to the Note & Observation tab. Select the Actions button and choose "Add New Note" or "Add New Observation".
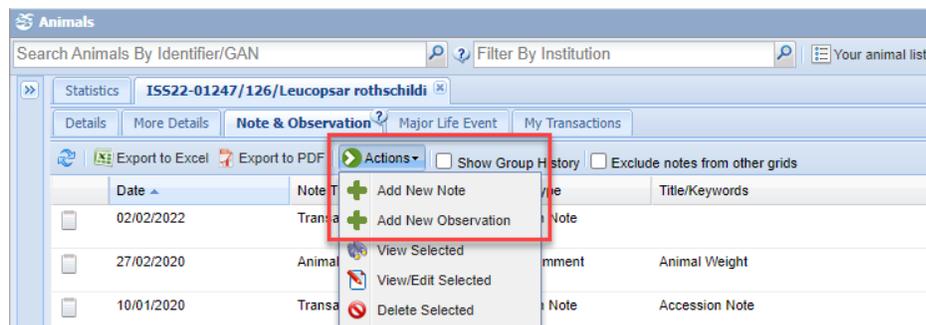
You can choose whether to add a note (1) or an observation (2). There are more fields available in an observation (highlighted in green). Observation can be more specific than notes as you can assign observations to other users, record more detail about the duration of the observation, or record it as a scheduled event.
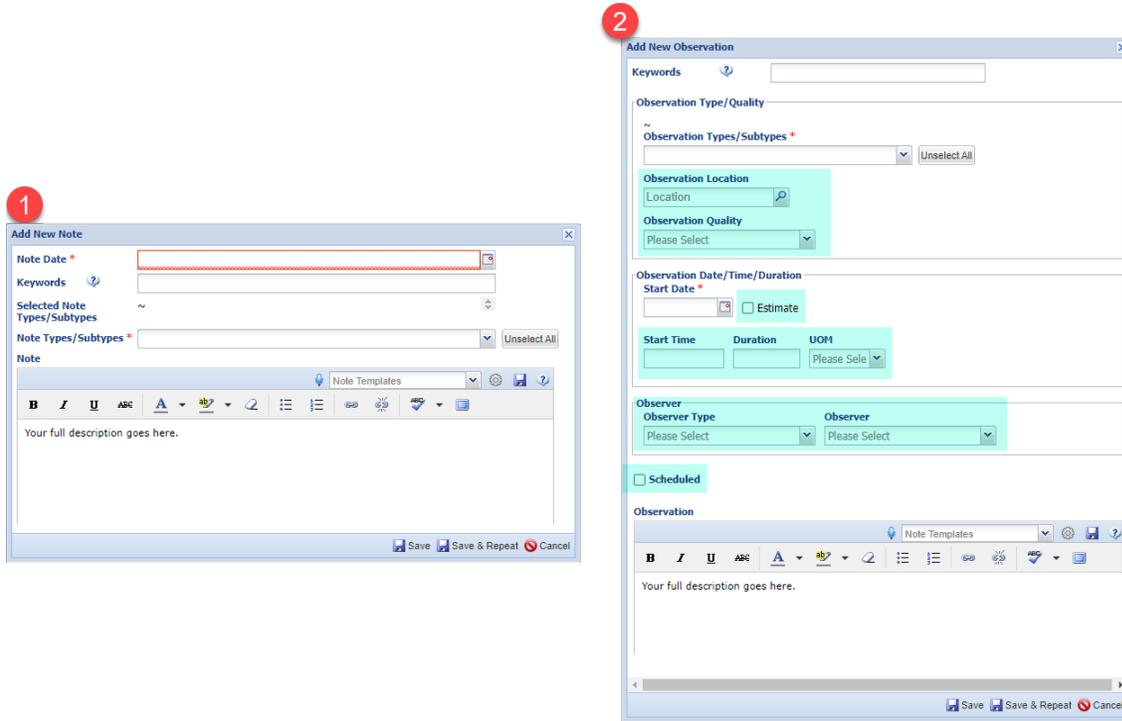
Complete the required fields and any others you wish. Click "Save" to save and close the entry, or "Save and Repeat" to save your entry and complete a second entry. When you save and repeat, the observation screen for the second entry will retain the information from the first entry to save you time. Use the "Unselect All" button if you need to remove all the Note Types/Subtypes, or use the check boxes to select or unselect specific Types/Subtypes.

The list of note types/subtypes provide an expandable menu with checkboxes allowing you to select multiple types and subtypes as needed:
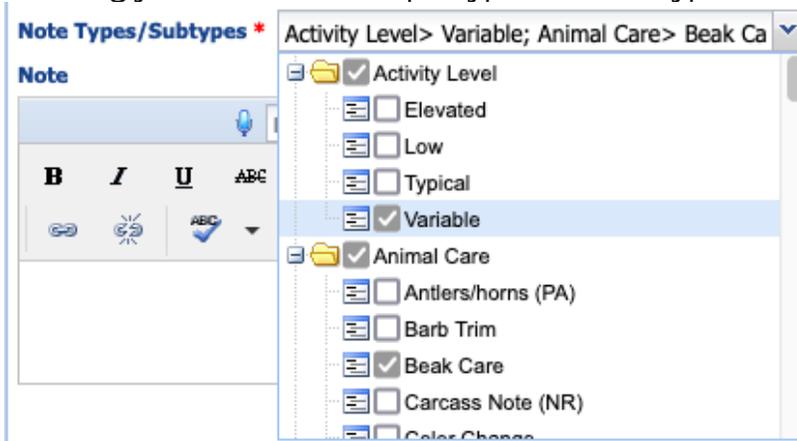
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Time saving tip:

Keyboard shortcuts can reduce your data entry time by reducing the number of times you need to use the mouse. When in the Note Types/Subtypes drop down menu:

- use the DOWN ARROW key to open the menu
- use the DOWN and UP ARROW keys to move up and down the menu
- use the LEFT and RIGHT ARROW keys to expand and collapse the note types to see/hide all the subtypes
- Type the beginning of the Note Type/Subtype to narrow down your choices. (You can re-type to search for the next one once you have selected a Note Type/Subtype)
- Use the ENTER key to select a Note Type/Subtype
- Use the ESCAPE key to close the menu.

You can also use the TAB key to move from one box to the next.

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Viewing Your Saved Notes and Observations

Once you have saved everything, you will see the note or observation appear in the Notes & Observations list. The list is sorted in reverse date order (newest item on top) by default, but can be re-sorted by clicking on any of the column headers.
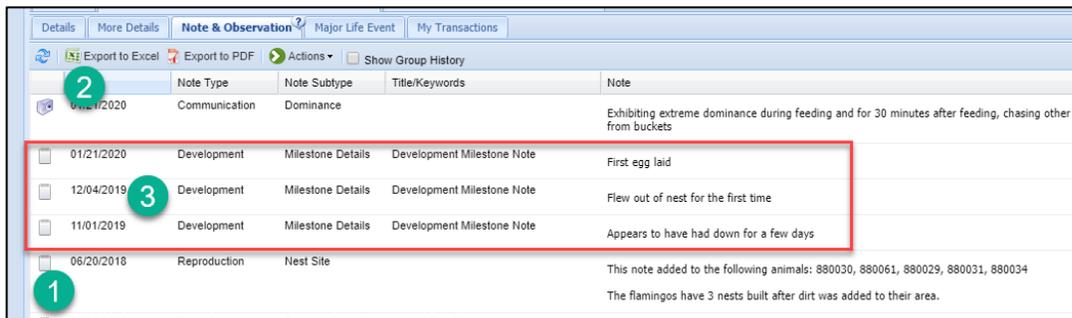
1. Notes have a notebook icon
2. Observations have a camera icon
3. Comments entered in Details fields of other data entry screens will display as Notes unless you have opted to hide notes from other grids.

If the Group or Individual has ever been associated with another Group, check the Show Group History box to include Notes & Observations from the previous records. The Notes outlined in red below were sourced from different Groups that this Individual had been associated with.

Notes added under studbooks use the same list of note types/sub-types. There are no observation options under Studbooks.
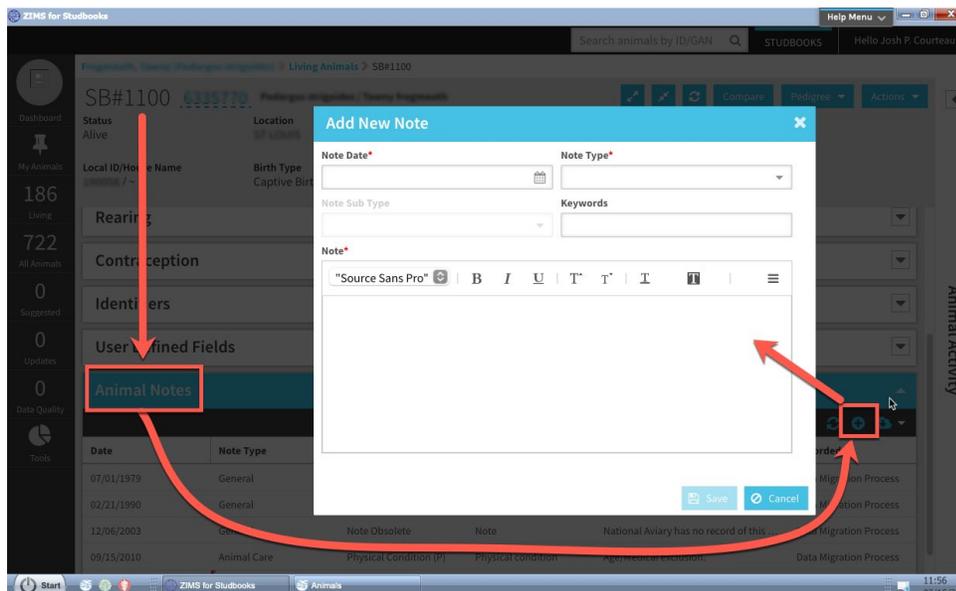
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Recording Notes & Observations for multiple records

Notes & Observations can be added to multiple animals at once through batch actions. Visit the [Batch Actions help document](#) for more information.

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Hiding specific Notes & Observation types and sub-types

Notes & Observations can be hidden in two different ways.
- Notes from other grids can be hidden by setting preferences in My Preferences (visit this [Preferences help document](#) for more information).

- Notes & Observation types and subtypes, and notes from other grids, can be hidden on an individual record.
    1. Check/Uncheck Exclude Notes from Other Grids to view/hide notes from other grids such as training sessions, enrichment sessions and weight comments. This box will over-ride the preference you have set in My Preferences and will revert to default when the record is closed, or you have logged out.
    2. Choose from a list of types and subtypes that you wish to exclude from your Notes & Observations – for example, hide everything but your animal care notes/observations, or hide any diet notes/observations. This choice will revert to default (nothing hidden) when the record is closed, or you have logged out.
    3. Choose whether you want the hidden types to apply to your notes.
    4. Choose whether you want the hidden types to apply to your observations.
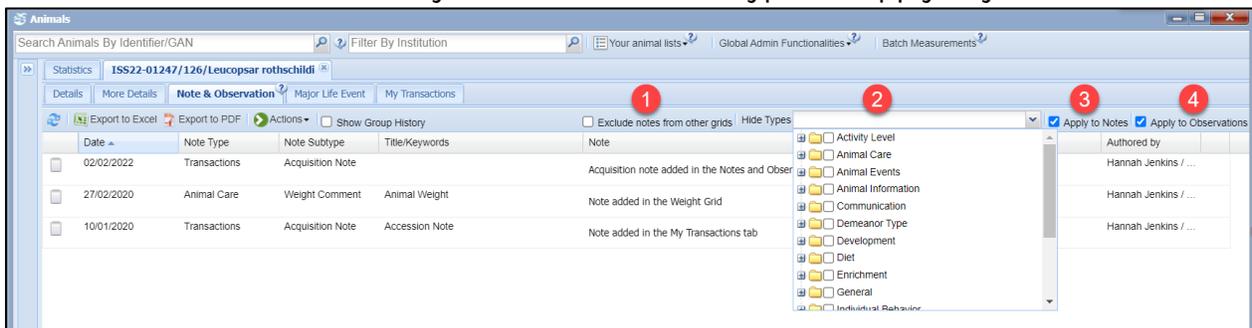
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Note Templates

At the top of all notes in ZIMS is the 'note template' manager. Note Templates are a way to create and maintain standardized note entries for your staff. Notes managed in the template manager can be updated centrally and can direct your staff on specific procedures and best practices at your institution. Ex. Notes required for new births, new accessions and dispositions.

1. Note Template Manager is available from the Start Menu, under Tools and also available via the 'gear' icon next to the Note Template drop down when adding a new note.
2. Template Types define where the note will be made available in ZIMS.
3. **Shared** will list this Note Template for other users at your institution when they are adding new notes. **Editable** will allow other users at your institution to modify the note template from the template manager.

4. Those templates categorized as "Animal Management Note Template" will appear in the husbandry side of ZIMS.
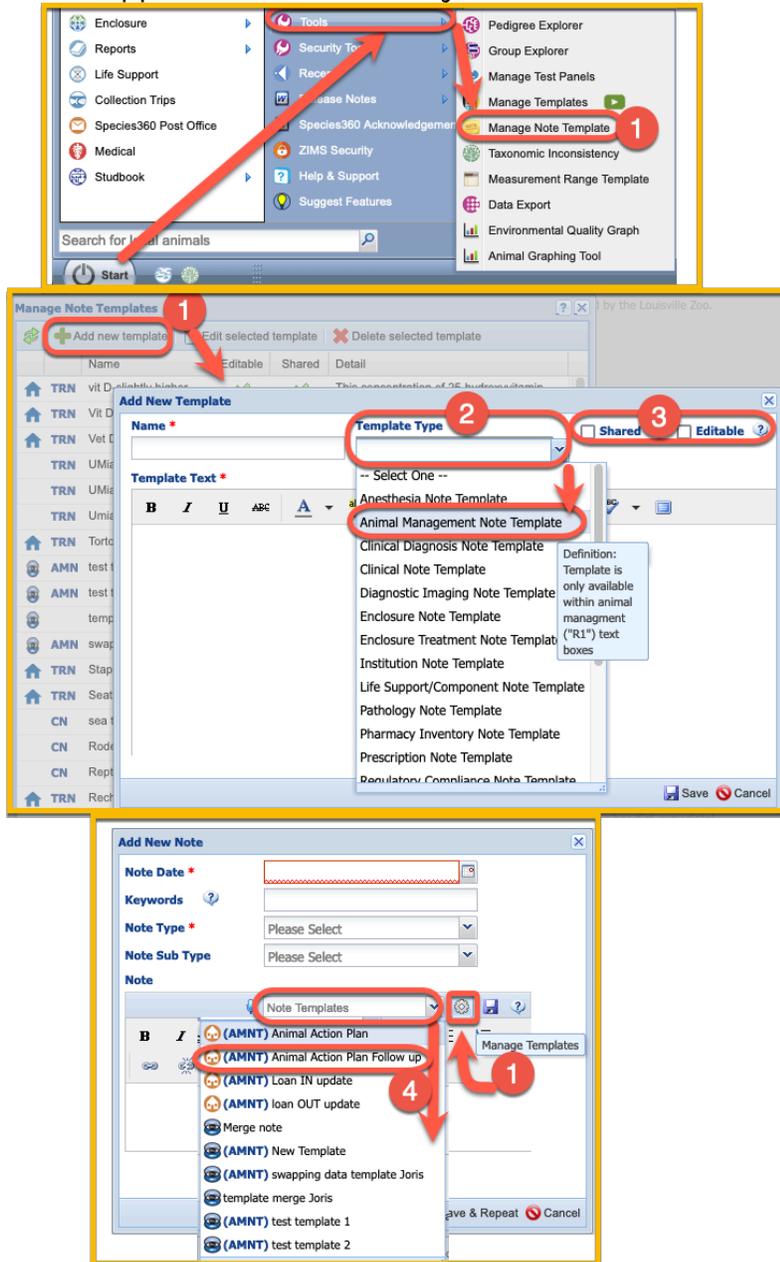
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Best Practices Advice

Some Best Practices for recording good Notes/Observations are

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- Do not use slang
- Do not use 'text' language (e.g. you not u)
- Use only approved abbreviations and reference what they mean the first time they are used
- Use professional and clear language – remember that someone reading the entry in the future may not speak the same first language as you
- When entering Notes & Observations as a batch, if you select to include Local IDs, record the text before the "this note added…" text to make easier reading

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Data Standards and Global Status

Here is a list of the Note/Observation types and subtypes plus definitions and whether or not they are globally shared. **Note this changes frequently, this list is updated as of the date stamp in the linked document.**

Download Note Types, definitions and global sharing status (EXCEL)

To find a specific Note Type/Sub-Type, Definition or Global Sharing status in the link below, click Ctrl+F (Apple+F) and search for the specific term.

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