

## CREATING AND USING ANIMAL LISTS

How to create an Animal List and how to use it to save you data entry time.

Contact [support@Species360.org](mailto:support@Species360.org)

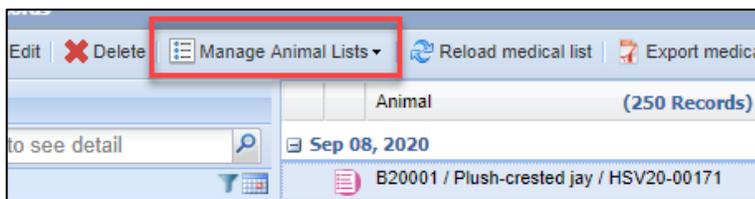
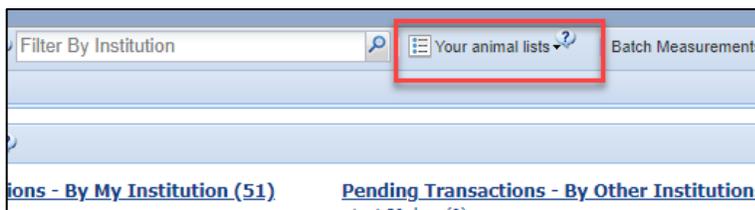
Animal Lists can help you save data entry time in many ways:

- You can quickly find animals that you are responsible for
- You can record multiple batch actions in the Husbandry module
- You can record batch Clinical Notes, Body Condition Scores, Health Status and Weights in the Medical module
- Daily Report and Specimen Report can be run using an Animal List
- Care and Welfare Templates can be created from an Animal List

Before you create Animal Lists, think about how you want to use them. If Lists are created by Teams or Strings, staff can quickly find the animals in their care instead of searching for them. Lists can also be created by Taxonomy or Enclosure, whatever works best for you. As animals come and go you will need to keep these lists updated manually.

See IMPORTANT INSTITUTION PREFERENCE OPTION below for dispositions.

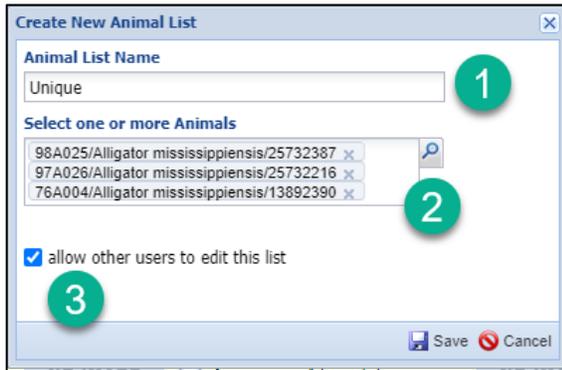
You can create and use Animal Lists from both the Husbandry and Medical module. All Lists will display in both modules regardless of which module they were created in. By default, all Lists are shared but you can select to not allow others to edit a List you create.



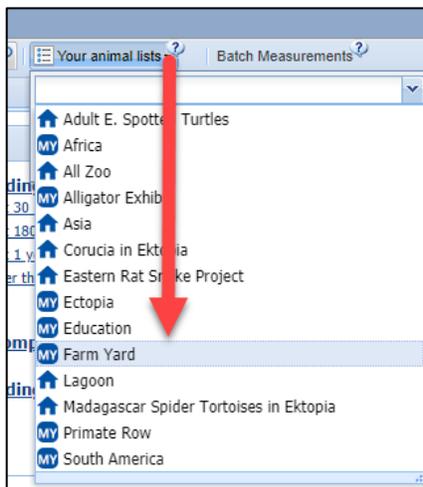
Animal Lists are found at the top of the Animals module in Husbandry (top) and the top of the Medical dashboard in Medical (bottom).

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.

To create a new Animal List select Create new animal list.

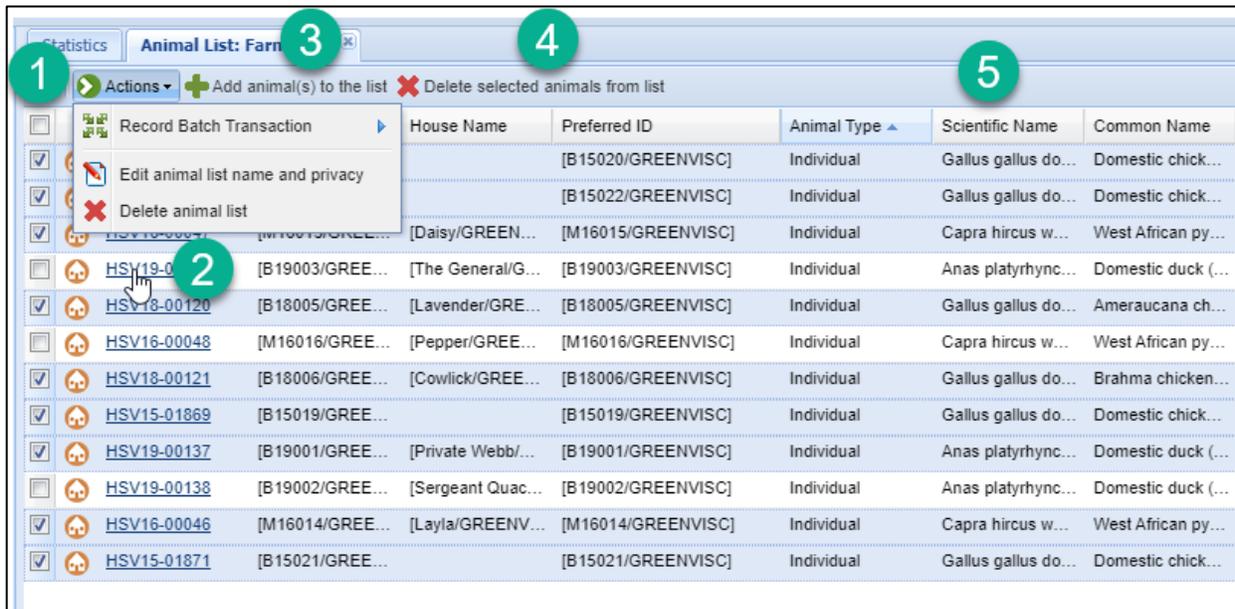


1. The Name must be unique. You may want to develop a convention for naming Lists so they are easily found.
2. You can enter animals one at a time or use the Look Up feature to search for them and select the results that match your needs.
3. By default all Lists are shared and anyone with the Role access can use them, but you can restrict editing to only you (and your Local Admin) by checking this box.



To use the List, select it from the dropdown list.

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1. By default, all animals are checked but you can uncheck any you do not want to include.
2. From the Actions menu you can Record Batch Transaction, Edit the list name and privacy (if editable or not) or delete the entire List.
3. From the top you can add new animals to the List.
4. From the top you can delete animals from the List.
5. The column fields and column order can be customized just like search results grids.

**IMPORTANT INSTITUTION PREFERENCE OPTION!**

In Institution Preferences > Application Preferences > Animal Lists you can select to enable auto-update of Animal Lists upon disposition/death. Checking this will not update dispositioned animals that remain in active Lists, it will auto-update going forward. You may not want to choose this option if you have Lists that you want to keep dispositioned animals in. There is no option to auto add births/hatches or acquisitions to Lists.

If a group record is part of a List and you have selected this auto-update option, only Full Disposition or Close Out will delete the group from the List. If a Partial disposition or acquisition is recorded, the group count will update but it will remain on the List.

Additional help:

[Batch Actions](#) and [Medical Batch Actions](#)

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