

## PROVISIONAL DATA ENTRY REPORTING

How to use Provisional Data Entry and where can unapproved data appear on reports.

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

Topics:

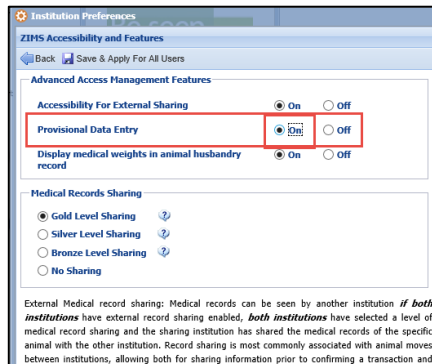
[Enabling and Granting Access via Provisional Roles](#)

[Use Case](#)

[Business Rules](#)

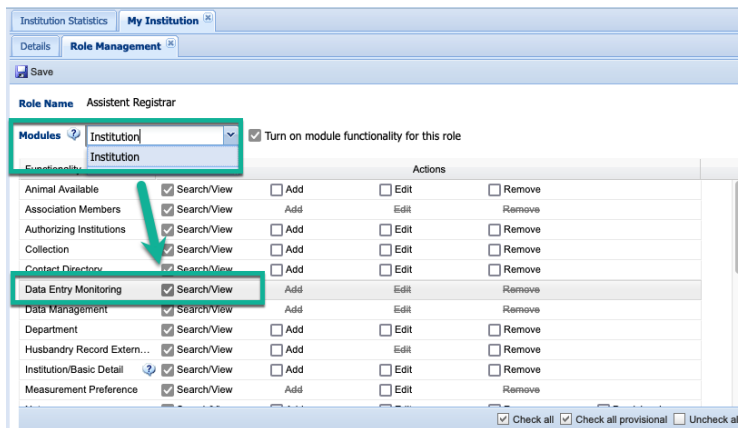
### Granting Access

The Species360 Global Admin must first turn on the functionality for Provisional Data entry. The institution on the left below has not yet had it turned on. The Institution on the right below has had it turned on. The Local Admin then needs to complete the activation by selecting the “On” radio button. Remember to Save & Apply For All Users” (the only Save option).

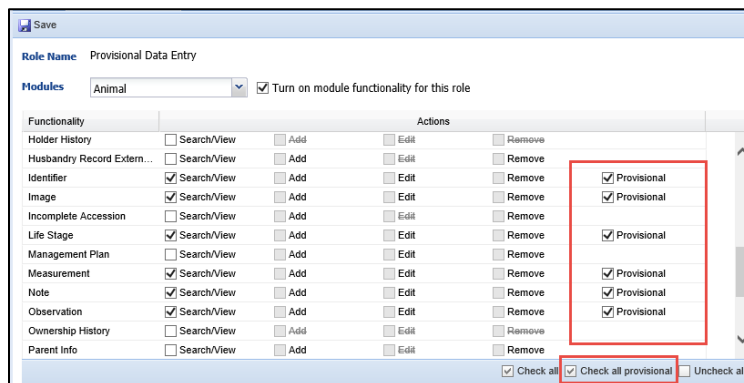


Provisional Data has not been added to any of the Species360 Template Roles. You can adjust a custom Role already created to include it, or create a new Role, whatever works best.

To review/approve/reject provisionally added data a user must be granted access to the Data Entry Monitor (DEM) – to add this to a role, DEM is listed under the Institution Module:



If Provisional access is granted to a user’s role, then the ability to Add/Edit or Remove are unchecked by default because they are controlled by the Provisional access. The same Role can have a mix of Provisional and Standard access for data entry. **Search/View Basic Details** for all modules will need to be checked even if only Provisional Data is allowed.

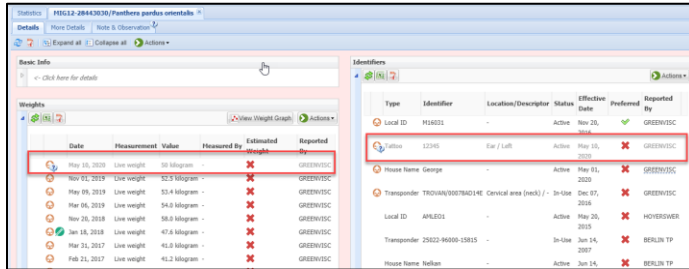


### Use Case

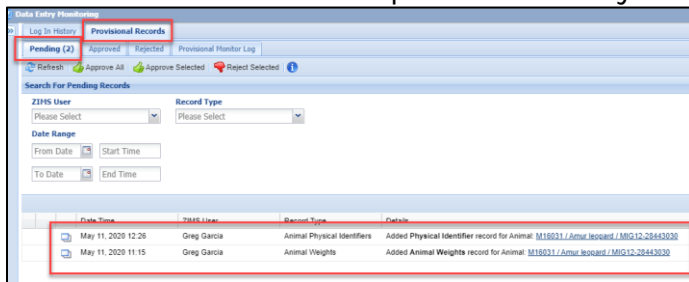
The typical scenario for using Provisional Data is Keepers/Aquarists doing their own data entry and Registrars then viewing and accepting or rejecting for final entry into the ZIMS database. It includes a Daily Report as well as the ability to include or exclude Provisional Data on some other reports.

Below, a keeper with Provisional Data entry access entered two pieces of information on an Amur leopard – a Tattoo and a Weight. There are two indicators that this is a Provisional Data entry. Primarily, the record is greyed out. In addition, some records display a “?” that when hovered over displays “Provisional record”. At this point the Provisional User can go back into the record and Edit or Delete their entry.

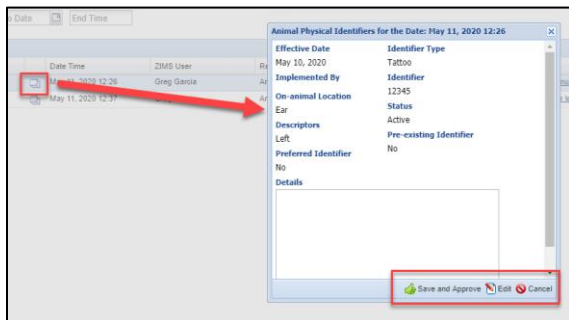
It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.



To Approve or Reject Provisional entries, go to Start > Security Tools > Data Entry Monitoring. Selecting the Provisional Records tab opens up four additional tabs. The Pending tab brings up a search screen and a list of what Provisional Records need to be addressed. Provisional records will be available here until they have been Approved or Rejected. We see the two that the keeper entered on the leopard. Using Data Entry Monitoring for Provisional Identifiers is a “roll forward” process. If you approve the entry it will roll forward and become a permanent entry in ZIMS.



Selecting the View Details icon pops up a view screen for what was entered. You can Save and Approve the record, or select to Edit the entry and then Save and Approve it from that screen. Once Approved the data will no longer display as Provisional in the record and the Provisional User who recorded it can no longer edit or delete it.

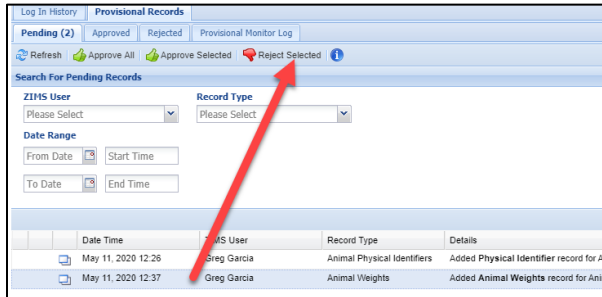


You look at the details for the animal weight and find the weight was recorded in grams when it should have been kilograms. You have three options:

- Edit and Approve the corrected record
- Reject the record and ask the User to re-enter it correctly

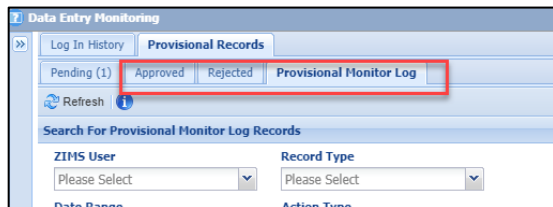
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- Ask the User to fix the record and Approve it once corrected  
You choose to Reject the record. A Rejected record will be removed from the grid where it was recorded.



If a Provisional User chooses to 'undo' a record (pop up in the lower left hand corner after Save is selected) right after they entered it, it will appear in the 'Rejected' tab in the Data Entry Monitor. It will be noted as an entry and a rejection by the same staff person. If they delete an entry prior to Approval, the entry will be deleted in the record and will not display in the Rejected tab or in the Pending list.

There are three other tabs under the Provisional Records tab.



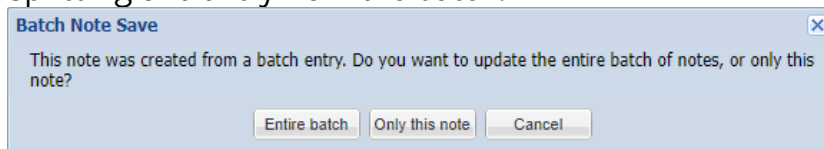
- Approved records will remain in the Approved tab for 90 days after Approval
- Rejected records will remain in the Rejected tab for 90 days after Rejection
- If you edit a Provisional record and then Approve it, ZIMS saves the original record in the Approved tab and the edited version in regular Data Entry Monitoring
- The Provisional Monitor Log saves the last Provisional entries and edits for 90 days

### Business rules

- Provisional Users can edit other Provisional data but not Approved/non-Provisional entries.
- Users with normal rights (non-Provisional) cannot edit Provisional data entries except in Data Entry Monitoring (if you have the access).
- Any user granted Data Entry Monitoring access is allowed the rights to review/edit/reject provisional and non-provisional data entries made by all users.
- Provisional entries must be Approved before they can be edited by Users with normal rights.

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- Entries created in batch (where single entry for all Users is selected) can be edited from the Pending tab (in the Data Entry Monitor) before approving. In ZIMS these 'batch transactions' are considered one single entry and each sub-record created cannot be modified separately before approval (except Notes – see below). Batch entries where a custom entry for each is selected can be provisionally edited as these are unique transactions in ZIMS.
- Notes entered provisionally as a batch can be edited from the notes and observation screen by a provisional user, either applying the edit to the entire batch or by splitting one entry from the batch.



- Entries made on Enclosures where 'include in enclosure occupant' option is selected behave like Batch transaction (single entry for all users) and cannot be edited before approval.
- Provisional Data Entry is available in the following modules:
  - Animal
  - Care and Welfare
  - Enclosure
  - Calendar
  - Life Support
  - Treatment Administration and Aquatic Enclosure Prescription in the Medical module.
- Provisional rights to Transponder assignments are not provided at this time because the access to create and assign Transponders is given through the Institution module. You can allow staff to provisionally enter other Identifiers and directly enter Transponders into the transponder inventory if you want.
- Reporting on provisionally flagged data (unapproved records) can be selected as options on the following reports: Daily Report, Note Retrieval Report, Activity and Enclosure Activity Reports. [More information on reports here.](#)

*Revised 24 August 2023*