

Global information serving conservation.



# Adding Notes & Observations

#### Contact SPECIES360 Support

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

Topics: <u>Recording Notes & Observations for a Single Record</u> <u>Time saving tip</u> <u>Viewing Your Saved Notes and Observations</u> <u>Recording Notes & Observations for multiple records</u> <u>Hiding specific Notes & Observation types and sub-types</u> <u>Note Templates</u> <u>Best Practices</u> <u>Data Standards, Definitions and Global Sharing</u>

# 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".

🗳 Animals									
Sea	Search Animals By Identifier/GAN								
≫	Statistics ISS22-01247/126/Leucopsar rothschildi								
	Details More Details Note & Observation 4 Major Life Event My Transactions								
	🍣   🚉 Export to Excel 🍃 Export	Exclude notes from other g	rids						
	Date 🔺	Note T 💠 Add New	Note //e	Title/Keywords					
	02/02/2022	Transa 🛖 Add New	Observation Note						
	27/02/2020	Animal 😵 View Sel	ected mment	Animal Weight					
	10/01/2020	Transa 🚫 Delete S	elected Note	Accession Note					

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.

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.



Global information serving conservation.



🚽 Save 🚽 Save & Repeat 🚫 Cancel

		Add New Observation
		Keywords 🔇
		Observation Type/Quality
		Observation Types/Subtypes *
		V Unselect All
		Observation Location
		Observation Duality
d New Note	×	Please Select
ote Date *	<u> </u>	Observation Date/Time/Duration
eywords 🔇		Start Date *
elected Note ~ ypes/Subtypes	÷	Estimate
ote Types/Subtypes *	VINSelect All	Start Time Duration UOM
ote	A Note Tomplates	Please Sele Y
B Z U 🔤 A - 🥸 - Q		Observer
Your full description goes here		Observer Type Observer
		Prease Select
		Scheduled
		Observation
		🕴 Note Templates 🔍 🛞 🔒 🔇
	🛃 Save 🛃 Save & Repeat 🚫 Cancel	B Z ∐ ﷺ <u>A</u> ▼ <sup>®</sup> 2 ▼ 2 ⊟ ⊟ ∞ 炎 ♥ ▼ ■
		Your full description goes here.

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:



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.

www.Species360.org – Global Information Serving Conservation



# Return to Topics

## 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.

# Return to Topics

# 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.

Ī	Details Note & Observation Major Life Event My Transactions								
ć	a Export to Excel 🔓 Export to PDF 👂 Actions - 🗋 Show Group History								
		2	Note Type	Note Subtype	Title/Keywords	Note			
To an index of the second design of the second d						d for 30 minutes after feeding, chasing other bi			
Г	1040	01/21/2020	Development	Milestone Details	Development Milestone Note	First egg laid			
Т	10101	12/04/2019 3	Development	Milestone Details	Development Milestone Note	Flew out of nest for the first time			
L	****	11/01/2019	Development	Milestone Details	Development Milestone Note	Appears to have had down for a few days			
	1	06/20/2018	Reproduction	Nest Site		This note added to the following animals: 880030 The flamingos have 3 nests built after dirt was ar	), 880061, 880029, 880031, 880034 Ided to their area.		
	1					The flamingos have 3 nests built after dirt was a	dded to their area.		

## 1.Notes have a notebook icon

2.0bservations 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.

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.

<u>www.Species360.org</u> – Global Information Serving Conservation



Global information serving conservation.



Det	ails More Detai	More Details Note & Observation W Major Life Event My Transactions							
2	Export to Exce	el 🏆 Export to PD	0F   🔊 Actions 🗸	Show Group History					
Date A Note Type Note Subtype Title/Keywords Note						Note			
	Sep 17, 2018	Animal Care		this is a note on the individual	_				
	Sep 14, 2018	General				This is a Note on the second split.			
	Sep 13, 2018	General				This is a Note on the first split			
	Sep 11, 2018	Animal Care				This is a note on the origin group			

Notes added under studbooks use the same list of note types/sub-types. There are no observation options under Studbooks.

💮 ZIMS for Stu	udbooks					Help	Menu 🗸 💶 🗖	) <b>×</b>
					Search animals by ID/GAN Q	STUDBOOKS		urteau
	Programmith, Taxong Physics							
	SB#1100 .		tripoldes / Towny Tragmanth		🗸 🖌 📿 Com	pare 🛛 Pedigree 🔻		
Dashboard	Status	Location	Add New Note			×		
#			Note Date*	Not	te Type*			
100	Local ID/Hot e Name	Captive Birt		<b>m</b>				
Living	Rearing		Note Sub Type	Key	/words	_		
722			Nota*	v				
All Animals	Contra ception		"Source Sans Pro"	B I U T	" T	=		
0 Suggested	Identi ers		Source sails no Q	DIUII		_		Anir
0 Lindatar	User fined F	ields						nal Act
0	Animal Notes							ivity
Data Quality								
Tools	Date	Note Type				order		
	07/01/1979					Migr		
	02/21/1990	General			🖺 Save	⊘ Cancel Mati		
		Gem	Note Obsolete	Note	National Aviary has no record of	this a Migrati		
		Animal Care	Physical Condition (P)	Physical condition	Age/Medical exclusion.	Data Migrati		0
(1) Start	🍯 🕘 🌖 🗄 🔘 zims	for Studbooks	Animals				1	1:56

#### Return to Topics

#### Recording Notes & Observations for multiple records

Notes & Observations can be added to multiple animals at once through batch actions. Visit the <u>Batch Actions help document</u> for more information.

#### Return to Topics

# 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 <u>Preferences help document</u> for more information).

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.

www.Species360.org – Global Information Serving Conservation



- Notes & Observation types and subtypes, and notes from other grids, can be hidden on an individual record.
  - 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.
  - 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.

🏐 Animals									
Search An	nimals By Identifier/G	AN	P 🛿 Filter I	By Institution	P 🗄 Your animal lists 🎺 🛛 Global	Admin Functionalities 🎺 🛛 Batch Measurements 🌮			
>> Stati	itistics ISS22-01247	//126/Leucopsar	rothschildi 🗷						
Deta	tails More Details	Note & Observat	tion 🎱 Major Life Event	My Transactions	1	<b>1 2</b>			
2	🔠 Export to Excel 🥊	Export to PDF	Actions - 🗌 Show Gro	up History	Exclude notes from other grids Hi	de Types	~	Apply to Notes 🗹 Apply to Observation	
	Date 🔺	Note Type	Note Subtype	Title/Keywords	Note	Activity Level		Authored by	
	02/02/2022	Transactions	Acquisition Note		Acquisition note added in the Notes a	and Obser		Hannah Jenkins /	
	27/02/2020	Animal Care	Weight Comment	Animal Weight	Note added in the Weight Grid	Communication		Hannah Jenkins /	
	10/01/2020	Transactions	Acquisition Note	Accession Note	Note added in the My Transactions ta	b Demeanor Type	- 1	Hannah Jenkins /	
						Diet Diet Dict Dict			
						General General		•	
						Enrichment General Control Endpoint		•	

## Return to Topics

#### 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.

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. www.Species360.org – Global Information Serving Conservation



Global information serving conservation.



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



#### Return to Topics

#### **Best Practices Advice**

## Some Best Practices for recording good Notes/Observations are

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.

www.Species360.org – Global Information Serving Conservation



- 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

## Return to Topics

### 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.

<u>Return to Topics</u>

Revised 12 July 2022