



# **Calendar and Tasks**

The calendar in ZIMS, as well as the alerts for animals and enclosures can help support efforts across your facility.

This help document will show you how use the built-in calendar in ZIMS, and how tasks can help support your workflow.

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# Accessing My Calendar

# Permissions

The calendar in ZIMS has its own role permissions to provide visibility to tasks for the following functionalities:

- Animal Alerts
- Animal Assessment/Observation
- Animal Enrichment Session
- Animal Measurement
- Enclosure Alert
- Enclosure Treatment Task
- Maintenance Task
- Medical Procedure
- Pathology
- Sample Collection





• Treatment/Prescription

The role creation is visible under medical and husbandry role management - note, the feature is not separate, both roles control access to the same features. It might be that your medical staff are only permitted a medical role in ZIMS, in that case their calendar access will be granted via their medical role.

The opposite might be true for a keeper or aquarist, their calendar access would be provided by a husbandry role.

#### Husbandry Role Management:



Details Studbook Role Management 🛞								
🚽 Save								
Role Name ZIMS user 3 Modules 3 Calendar	~	✓ Turn on module f	unctionality for this rol	e				
Functionality			Actions					
Animal Alert	Search/View	🗸 Add	🗹 Edit	Remove	Provisional			
Animal Assessment/Obser	Search/View	🗸 Add	🗹 Edit	Remove	Provisional			
Animal Enrichment Session	Search/View	🗸 Add	🗹 Edit	Remove	Provisional			
Animal Measurement	Search/View	🛃 Add	🗹 Edit	Remove	Provisional			
Enclosure Alert	Search/View	🛃 Add	🗹 Edit	Remove	Provisional			
Enclosure Treatment Task	Search/View	🛃 Add	🛃 Edit	Remove	Provisional			
Maintenance Task	Search/View	🛃 Add	🛃 Edit	Remove	Provisional			
Medical Procedure	Search/View	🛃 Add	🛃 Edit	Remove				
Pathology	Search/View	🗹 Add	🛃 Edit	Remove				
Sample Collection	Search/View	🗹 Add	🛃 Edit	Remove				
Treatment/Prescription	Search/View	🗹 Add	🛃 Edit	Remove				
				🗹 Check all 🗹 C	heck all provisional 📃 Un	check all		

Note, if a user is assigned a calendar role under medical and husbandry, the access granted will defer to the role with the most amount of access.





## **Opening My Calendar**

You can open My Calendar from the Start menu > Institution > My Calendar. If you have not opted to remove it, there is also a My Calendar icon on the desktop.





You can also navigate to calendar from the Medical Dashboard screen by clicking the My Calendar button in the top right corner.

😝 Medical Records												
🈁 New 🗸   🔪 Edit   🗶 Delete   🧮 Manage A	nimal Lists	🔹 😂 Reloa	d medical list 🛛 🏹	Export medical lis	st 🛛 🕗 Medical Repor	ts <del>-</del> Medic	al Apps 🗸 🔘 S	ample Storage				🔞 My Calendar
Dashboard 😲		Animal			Date	Details	F	Responsible Staf	f	🍣 🛛 Basic Info	-	
Select animal to see detail				No recc	ord found.					Identifiers Local ID Current Enclosure Sex Scientific Name Common Name Birth Age Arrival Owner	GAN: <u>15522-</u> 103 <u>Species360</u> Male Dendrophryn minutus Toad 05/01/2022 0Y 0M 26D 05/01/2022 <u>SPECIE360</u>	01221 ilscus
Dashboard										Holder 🐨 Last Weight	SPECIE360	
Clinical Notes	2 Expor	t to PDF   🔪	Edit 🛛 🗙 Delete					🗖 Maxi	mize	Add New Weight Collection	Primary Anin	nal
Diagnoses & Procedures	G/	N	Preferred ID	Taxonomy		Sex	Birth Date	Age		Health Status	Collection	
Prescriptions/Treatments	Submiss	Col         ISS22-01221         103         Dendrophryniscus minutus/Toad         Male         05/01/2022         0Y 0M 8D           Submission					Body Condition Score	Undetermine	<u>id</u>			
🔋 Samples	Death Date S	Date ubmitted		05/03/2022 00:00 05/09/2022	Carcass Weight - Measurement Estimate			~		Medical Alerts No Active Medical Aler Active Problems	ts Found	

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# Navigating My Calendar

# Calendar Defaults

When you first open My Calendar, it will default to view "All" calendars (1), which will show all tasks in the calendar. You can use the drop-down menu to select which calendar you wish to see. You can select a specific user (e.g. yourself), or a team. Selecting a team will show you all of the calendar tasks assigned to a user within that team.

E.g., Selecting Veterinary Team will show all calendar tasks assigned to the Veterinary Team, Vet 1 and Vet 2.

If you have chosen a specific calendar to view, ZIMS will remember that default the next time you open My Calendar.

When you first open My Calendar, it will default to view in <u>Calendar View</u>. You can click on the List View button in the top right (2) to switch to <u>List View</u>.



# **Calendar View**

Calendar view displays the calendar all tasks in a grid view. You can switch to view a single day, a week, 2 weeks, or the whole calendar month (1).

You can filter the calendar to view tasks for specific animals or enclosures (2), and choose to hide completed tasks (3).

You can also use the 'Task Types' menu (4) to filter the calendar. Simply click on each task type to hide those tasks and click again to turn them back on. Hidden tasks in the Task Types menu are lighter in color with white lines (5).





😰 My Calendar								
Viewing Calendar of All	l Task	🛛 🎸 Complete 🔮 Provi	sional				May 1 - June 4, 2022	Calendar View List View
Calendar Items Search 😲	То	day 🖣 🕨 Jump to		Go Go			Day We	eek 2 Weeks Month
Animal IDs		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Please select	18	May 1, 2022	2	3	4	5	6	7
Enclosure			Lameness reported	Observe T01 walkin	Measure Mountain C	Chicken frog lengths T	018 / Mountain chick	
Search Enclosure								
☑ Include Enclosures Below								
	19	8	9	10	11	12	13	14
Hide Complete Tasks		Pool level reducing. C	Check levels daily Ale	ert for Enclosure: <u>PP1</u>	GA planned for T01			
Task Types 4								
Animal Alert	20	15	16	17	18	19	20	21
Animal Measurement		Urine / Red panda / 2	2 animals					
Enclosure Alert Medical Procedure Samole Collection								
Prescription Treatment	21	22	23	24	25	26	Today 12:05pm	28
Pathology								Start Ofloxacin 0.3
Enrichment Item Session 5								
Enclosure Treatment Task								
	22	29	30	31	Jun 1	2	3	4
🖉 Reset 🔍 Search								

Tasks which have been added as "all day" will appear as a solid color. Tasks which have been added for a specific time within a day appear with a white background and text color of the task (in this case below, black text for a medical procedure).

Today 🖣 🕨 Jump to:	Go Go					Day Week 2 Weeks Month
May 8, 2022	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14
Pool level reducing. Check le	vels daily Alert for Enclosure	: <u>PP1</u>	GA planned for T01 T01 / Li	12:00 GA for T02 T02 / Lior		
15	16	17	18	19	20	21
Urine / Red panda / 2 anima	ls					

In the Day or Week view, tasks which have been added as "all day" will appear at the top of the day. Tasks which have been added for a specific time within the day will appear in the day view.

Today	4 ►	Jump to:	Go Go					Day Week 2 Weeks Month
		May 8, 2022	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14
	Pool le	vel reducing. Check	levels daily Alert for Enclose	ure: <u>PP1</u>	GA planned for T01 T01 /			
Tram								· · · · ·
12pm						12:00 GA for T02 T02 / Lion		
						/		
Tpm								
2pm								
2								
opm								
4pm								



Tasks which have been assigned to you (the logged-in user) will appear with a black border. Here, the "Whole Blood" samples have been assigned to the logged-in user.

				1
8	9	10	11	12
Pool level reducing. Check levels daily Alert for E	inclosure: <u>PP1</u>	Plasma / Lion /	/ T03 / LZH22-00003 Whole Blo	ood / Lion / T03 / LZH22-0(
	V Whole Bloo	od / Lion / TO2 / LZH22 GA planned for	r T01 T01 / Lion / ~ 12:00 GA	for T02 T02 / Lion / ~
		<b>A</b>		
		1		

To add a new task in Calendar View, click on a date to bring up a new task. See <u>Adding</u> <u>Calendar Tasks</u> for more instructions.

Double click on a calendar entry to edit or delete the entry, or to mark the entry as completed.



You can click and drag an entry to move it to another date. Alternatively, you can right click an entry to bring up the menu to edit, delete or move the entry

То	day 🖣 🕨 Jump to: 🛛	Go Go	
	Sun	Mon	Tue
18	May 1, 2022	2	3
		Lameness reported Aler	Observe T01 walking T0
		🔯 Edit Details	
		🗙 Delete	
		🛗 Move to	F
	0	0	10





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#### List View

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L	.ιδι	view	uispia	ays an	or the	LASKS	ma	πδι.

B My Calendar												
💠 Add New Task 💙											Calendar	View List
Calendar Items Search 🕴	~	Calendar It	em Search Results									4 6
Responsible Party 🥹 🛛 🕛		Done	Date		Entity Name	Event Type	Title	Additional Staff	Task Location	Assigned To	Current Enclosure	Actions
Please Select	*		May 02, 2022	۱) 🕲	T01   Lion	Animal Alert	Lameness reported	~	~	Keeper 1	TRAINING	1
Date Range			May 03, 2022	۱) 🍪	T01   Lion	Animal Assessm	Observe T01 walking	~	~	Vet 1	TRAINING	
From			May 04, 2022	) 🕲	T018   Mountain chi	Animal Measure	Measure Mountain Chicken frog leng	~	~	Keeper Team	MCF1 + 2 more	
May 01, 2022			May 08, 2022		PP1	Enclosure Alert	Pool level reducing. Check levels daily	~	~	Keeper Team		-
То			May 11, 2022	) 🕲	T01   Lion	Medical Procedure	GA planned for T01 🥥	Vet 2	Vet hospital	Vet 1	TRAINING	
May 28, 2022			May 15, 2022	) 🕄	T04   Red panda +	Sample Collection	Urine / Red panda / 2 animals	~	Vet hospital	Keeper Team	TRAINING + 1	-
1107 207 2022			May 23, 2022	) 🕄	T019   Mountain chi	Pathology	Perform pathology for T019	~	Vet hospital	Vet 1	MCF1	
			May 23, 2022		PP1	Enclosure Treat	Treat water with antibiotic	~	Vet hospital	Keeper 2		
Animal IDs	0		May 28, 2022	) 🕲	T02   Lion	Prescription Tre	Start Ofloxacin 0.3% Ophthalmic 3 d	~	~	Species360 Trai	TRAINING	90
indosure Search Enclosure Include Enclosures Below	Q			Ī					l	ZIMS	5	
Task Types Animal Assessment Observation Animal Assessment Enclosure Alert Medical Procedure Sample Calection												
Prescription Treament Pathology Enrichment Item Session Maintenance Task Enclosure Treatment Task												

You can edit any task in the list by double clicking the task to open.

You can again use the search filters (1) to search for tasks for a specific animal, enclosure, team/user, and to hide completed tasks. There is the additional option in list view of searching for a specific date range.

From the list view, you can mark items as complete by clicking the check box in the Done column (2).

You can navigate straight to the animal's husbandry or medical record by clicking on the icons (3).

You can hover over any information that is too long for the column (e.g. Current Enclosure column: *TRAINING + 1*).

For any task which has been entered by a user (i.e., not automatically created by ZIMS), you can click the clone icon (4) to clone the task and save for another animal/enclosure/date.

For any tasks which have been automatically generated by ZIMS (e.g., through a prescription), the clone icon will be blocked (5).

You can click on the *i* icon (6) to see a summary of the medical records (below) for the animal in the task.





edical Records Summary							
Export t	o Excel 🛛 🎇	Export to PDF					
Animal II	)	1001 / Famala					
Current M	1 / LZHZZ-00	es and Treatm	ents				
Date	Record T	уре	Details	Responsible St	aff		
~			No data found				
Medical F	lecords Sun	nmary (last 12	months)				
Date	Record Type	Details			Responsible Staff		
May 09, 2022	Clinical Note	Lameness stil	l progressing. GA planned for	11/05/2022	Species360 Training		
May 06, 2022	Clinical Note	Lameness pro	Lameness progressing. Species360 Training				
May 03, 2022	Clinical Note	Vet observed monitored over	Vet observed animal, slight lameness in back right. To be Species360 monitored over next few days. Training				
May 02, 2022	Clinical Note	Keepers repor	t lame last thing. To be obse	rved tomorrow.	Species360 Training		

You can add a new task by clicking on the Add New Task button (7) in the top left corner. See Adding Calendar Tasks for more instructions.

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# Adding Calendar Tasks

Calendar tasks can be added directly into the calendar in Calendar View and List View, from specific areas within the medical module and husbandry module.

When adding a new task from My Calendar, left click anywhere on the calendar in Calendar View, or click Add New Task in List View.

You first need to choose the type of Task/Event you want to add:



There are 11 types of task that can be added:

Animal-Based Tasks	Enclosure-Based Tasks
Animal Assessment Observation	Enclosure alert
<u>Animal Alert</u>	Enclosure Treatment Tas
Animal Measurement	<u>Maintenance Task</u>
Enrichment Item Session	

ask





<u>Medical Procedure</u> <u>Pathology</u> <u>Prescription Treatment</u> <u>Sample Collection</u> Medical Alert in Basic Info <u>Clinical Notes</u>

# Animal-Based Calendar Tasks

Animal-based calendar tasks require the same information. To complete the task you will need to record:

- The animal or animals assigned the task
- The date and time of the task
- Who the task is assigned to
- The title of the task (i.e., what the task is about)

You also have the option to record:

- The priority
- Any additional staff associated with the task
- The location of the task (an enclosure code)
- Any additional notes

dd New Task / Even	t Туре	
Task/Event Type *	Animal Assessment Observation Priority Medium – 2 Y	
Animal(s) *	S.	Q
When *	May 16, 2022 📑 to May 16, 2022 🖪 🗹 All day	
Assigned To *	Please Select   Additional Staff Please Select	~
Task Location	Search P	
Title *		
Notes	Note Templates 🛛 🖌 🛞 🚽	2)
	B I U AS€ A - ♥ - 2 != != ∞ ∞ ♥ - □	
	Save & Repeat - Can	cel

## Animal Alert

Animal Alerts require the same information as the <u>Animal-based tasks</u>, but in addition Animal Alerts can also be added from an animal's record within the Alerts grid. The Animal Alert task will display in both the animal record and Calendar regardless of where it was entered.

Animal Alert from the Husbandry module:





ch Adminus By IdentifierGAN	mals					
Statistics       ISS21-01138/102/Abhrus fulgers #         Details       Nore Details       Nore Solds         Statistics       Colds per all       Colds per all       Colds per all         Statistics       Colds per all       Colds per all       Colds per all         Statistics       GAM: ISS21-01138 / Docd / Hale       Image: Sold per all       Colds per all         Individual       GAM: ISS21-01138 / Docd / Hale       Image: Sold per all       Colds per all         Sold: Sold       Colds per all       Colds per all       Colds per all         Sold: Sold       Colds per all       Colds per all       Colds per all         Sold: Sold:       Colds per all       Colds per all       Colds per all         Sold: Colds       Colds per all       Colds per all       Colds per all         Sold: Colds       Colds per all       Colds per all       Colds per all         Sold: Colds per all       Colds per all       Colds per all       Colds per all         Sold: Colds per all       Colds per all       Colds per all       Colds per all         Sold: Colds per all         Sold: Colds per all       Colds per all       Colds per all       Colds per all       Colds per all </td <td>h Animals By Identifie</td> <td>er/GAN</td> <td>P 3 Filter By Institution</td> <td>🔎 🗄 Your animal lists 💞</td> <td>Global Admin Functionalities 💞</td> <td>Batch Measurements</td>	h Animals By Identifie	er/GAN	P 3 Filter By Institution	🔎 🗄 Your animal lists 💞	Global Admin Functionalities 💞	Batch Measurements
Details     Nore Details     Note A Closervetion <sup>4</sup> / <sup>4</sup> Mayer Unde Kenett     My Transactions       Image: Section - Se	Statistics ISS21-01	1138/102/Ailurus fulgens 🗵				
Conception provided all Contages all Con	Details More Detail	Is Note & Observation 2 Major	Life Event My Transactions			
Individual Death in       GAN: 15521-01138 / Dead / Hale         Individual Death in       GAN: 15521-01138 / Dead / Hale         Social D       [102/0700000         Brith / Age       More Text         More Text       More Text	an 🔁 🛛 🖾 Expand all	I E Collanse all 🔊 Actions 🖌 🌈	Madical Pacorde Lal Animal Graphing Too	1		
Isast: Info    Individual GAN: 15521-01138 ( Dead / Hale   Local ID [102/3PECEIS0]   Prefered ID 192   Socies Individual Status   ICC: EN CITES: I CITESU: A   Statubooks: GAA, NUZA, ZAA   Birth / Age   Wid Birth/Isach   Birth / Age   Mid Birth/Isach<	· · · · · · · · · · · · · · · · · · ·		And the second s and s			
<ul> <li>Constraint Status</li> <li>Constraint S</li></ul>	Basic Info			Identifiers		
Individual CARI: ISS21-01138 / Dead / Hale   Local ID (DX)(SPCCIESNO)   Prietrand ID 102   Species California   Justic Crites: IC/Crites: IC/Crite: IC/Cr	4 🕸 🖪 🔒			Click here for details		
Individual     GAH: ISS21 0113 (Podd / Hale       Local ID     [102/FECEIBO]       Preferred ID     192       Socies     Individual formation (Podd / Hale       Widd Berch / Isach     Individual formation (Podd / Hale       Birth / Age     Midd Berch / Isach       Birth / Age						
Local ID [ID2/PFCEEX80]   Performed D 102   Species IN Marcos Molesce / Cata anada   IFU/D EXECTORS / CITSES	Individual	GAN: I5521-01138 / De	ead / Male	Parent Info		
Preferred ID       102       Interviewed ID         Species       Interviewed ID       Interviewed ID	Local ID	[102/SPECIE360]	NO IMAGE	<ul> <li>&lt;- Click here for details</li> </ul>		
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Birth Location       China /         Wild Birth Type       Wild Birth/Latch         Birth / Age       Anter Newsky         Birth / Collection       Next Newsky         Next Start Late*       Next Newsky         Birth / Age       Next Newsky         Birth / Age       Next Newsky         Birth / Age       Next Newsky         Next Start Late*       Next Newsky         Birth / Age       Next Newsky         Next Newsky       Next Newsky         Next Next Newsky       Next Newsky         Next Next Next Next Next Next Next Next		Studbooks: FAZA, WAZ	A AZA ZAA	Click here for details		
© Brith Type Wild Brith/Itatab   Brith Age Add Inex Anti   Brith Age Add Inex Anti   Halt Status Provide Status   Body Condition Add Inex Status   Body Condition Inex Status   Body Condition Inex Status   Body Condition Hondon Inex Status	Birth Location	China /				
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Let: Collection       Aler trait         Individual Death II       Aler Short Time         Individual Death II       Aler Short Time         Individual Death II       Aler Short Time         Individual Death II       Aler Times Time         Individual Death II       Aler Times Times         Individual Death II       Aler Times Times         Individual Death II       Aler Times Times         Individual Death II       Times Times         Individual Death II       Times Times         Images       Images	Birth / Age	Add New Alert	×	Click here for details		
Wet State Units:       Provide State:         Head IN States:       And rest State Units:         Body Condition       And rest State Units:         D       Chick here for Concersing Transac_community         D       Chick here for Concersing Transac_community         D       Chick here for D		Alert Text *	Alert Priority			
Predit Status       And rows	Last Collection		Please Select	Taxue w / Sex Type / Collection		
Body Condition       And Reasons Theme         Individual Death Is       And Reasons Theme         Individual Death Is       And read         Individual Death Is       Totals         Individual Death Is       Individual Death Is         Individual Death Is       Totals         Individual Death Is       Individual Death Is	Health Status	Alert Start Date	Alert start lime	> <- Click here w.		
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## Animal Alert from My Calendar:

Add New Task / Even	t Type	×
Task/Event Type *	Animal Alert Priority Medium – 2 Y	
Animal(s) *	Search for Animals	Q
When *	May 16, 2022 🖸 to May 16, 2022 🖾 🗹 All day	
Assigned To	Please Select   Additional Staff Please Select	*
Task Location	Search P	
Title *		
Notes	Note Templates 🗸 🛞 🔒	2)
	B I ∐ ABC A - 12 - 2 \ ⊟ 1⊟ ∞ ∞ ∞ ♥ - □	
	Save Save & Repeat Car	cel

When adding an Alert from My Calendar, you will need to specify which animal or animals the alert is for. Within the My Calendar Animal Alert, you can also assign the task to additional staff, and a location. The rest of the fields are the same for both alert boxes.

The Alert will display in the Calendar across the dates selected, and also in the Alert grid of the animal record, no matter where you entered the task.







## **Enrichment Item Session**

The Enrichment Item Session task is similar to the above animal tasks, with the addition of the mandatory Enrichment Item field. To be able to choose the enrichment item, the animal(s) in question must have the enrichment item assigned (<u>see more on enrichment items here</u>).



## Sample Collection

The Sample Collection task has the additional mandatory field of Sample Type. The task also differs in that the title is automatically generated from the information recorded in the task.





Add New Task / Even	Туре	2
Task/Event Type *	Sample Collection    Priority Medium – 2	
Animal(s) *	T02/Panthera leo/Lion/LZH22-00002 ×	9
When *	May 16, 2022 🖪 to May 16, 2022 🖾 🗹 All day	
Sample Type *	Serum Assigned To * Please Select	~
Additional Staff	Please Select V Task Location Search	Q
Title Insert Case Details	Serum / Llon / T02 / LZH22-00002	
Notes	Note Templates 🗸 🛞 🔒	Z)
	B I ∐ ₩ <u>A</u> • <u>*</u> • 2 ⊟ ⊟ ∞ ∞ <sup>∞</sup> * ■	
	Save Save & Repeal - Car	icel

(more on Insert Case Details button here)

#### Enclosure-Based Calendar Tasks

Enclosure-based tasks require you to assign an Enclosure to the task rather than an animal. Enclosure Alerts and Maintenance Tasks can only be assigned to a single enclosure, but Enclosure Treatment Tasks can be assigned to multiple enclosures within the same task.

Add New Task / Even	t Type	×
Task/Event Type *	Enclosure Alert Priority Medium – 2	
Enclosure *	Search for Enclosure	P
When *	May 10, 2022 🖪 to May 10, 2022 🖪 🗹 All day	
Assigned To	Please Select   Additional Staff  Please Select	~
Title *		
Notes	Note Templates 💌 🛞 🚽	3
	B I ∐ ₩ A + 🕸 + 2 🗄 🗄 📾 🝏 🖤 + 🗐	
	Saus Saus Basada	
	Save Save & Repeat - Ca	icei





Enclosure-based tasks can be added from either My Calendar, or from the Alerts grid within the enclosure record.

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arch for enclosures	P 💠 Add New 🛛 🗄	Tree View   🔄 Associated Life Supports   🥏	Merg	ge Enclos	sures - Batch Measur	ements 🤣 🛛 🗄	Your enclosure lists	•3		
Enclosure Tree View 🗷 PP1	×									
Details More Details 0	ccupants									
A D Expand all E Co	llanse all									
Basic Detail			Fee	ed Logs						
		Actions •	⊳	<- Click	here for details					
Name / Identifier	PP1 / -									
Parent Enclosure	TRAINING		Wa	ater Qua	lity Measurements					
Category / Type	Aquatic / Aquarium		Þ	<- Click	here for details					
Water Type	Seawater (artificial)									
Responsible Party			Att	ached L	ife Supports					
Permit List	-			<- CIICK	nere for details					
Location			Ma	intonan	co and Water Change	-				
Latitude	-		Fid	c- Click	bere for details	3				
Longitude	-		-	- chen						
Movable	×		End	closure	Treatment Record					
Walkthrough	×		Þ	<- Click	here for details					
Active	×									
			Enc	closure	Alerts and Calendar T	asks				
Planned Taxa			4	8 N	Include comple	ete tasks				Actions
Click here for details										
					Calendar Task	Start	Title	End	Priority	Assigned
Maintenance Requests					Enclosure Alert	May 09, 2022	Pool laval radueire	May 10, 2022	Madium	Kaapar
V <- LIICK nere for details					Enclosure Alerc	00:00	Check levels daily	00:00	2	Team
					Enclosure Treatment	May 23, 2022	Treat water with	May 24, 2022	Medium -	Keeper 2
					Task Treatment Task	00:00	antibiotic	00:00	2	
				Prev	Page 1 of 1	Next Page 9	Size 20 Change			

## Inserting Case Details into a Calendar Task

When adding a new Animal Assessment Observation, Medical Procedure, Pathology, Prescription Treatment or Sample Collection task, once you have assigned an animal an Insert Case Details button appears. When clicked, this button will insert the most recent medical case details into the task note for the animal(s) selected.





Edit Task / Event Ty	pe																	
Task/Event Type	Medica	I Proce	dure					Priorit	У	Mediun	1 – 2	~						
Animal(s) *	T01/L	ion/~ ×																Q
When *	May 1	1, 2022	2 🖻	to	May 1	1, 202	22 🖻	🗸 All	day									
Assigned To *	Vet 1						~	Additi	onal	Staff	Vet 2	2						~
Task Location	Vet ho	ospital ;	C				P											
Title *	GA pla	anned f	or TO	1														
Insert Case Details																		
Notes										N	ote Ter	nplates			×	0		Q
	в	I	U	ABC	A	-	aby	- 2	13	Ξ	69	È	1	8C -	-			
4	Most 2022	Recent !)(Spec	t Clini ies36	cal N 0 Tra	ote:Ge ining)	neral	:Lame	ness stil	prog	gressing	. GA p	lanneo	l for	11/0	5/2022	2 (Ma	y 09,	
Wark complete												Save			Delete		Ca	ncel

## Automatic Tasks

Some medical tasks are created on the calendar automatically.

Animal Assessment Observation is a system generated calendar task that is created on the last day of treatment for any treatment that goes longer than 7 days. The intent is to prompt the vet/staff to reassess the case to see if it improved, declined or stayed the same. This task can also be entered directly into the calendar and does not have to be generated by a treatment.

Prescriptions which have been written to start in the future will auto-generate a calendar task for the start date to remind staff when to start the prescription.

Additionally, when a default pathologist is defined in your institutional preferences, a necropsy submission will automatically add a calendar task, assigned to the default pathologist, to schedule a necropsy.

## Creating Tasks from a Clinical Note

When a new clinical note has been saved, the Calendar Tasks tab becomes active. Here you can automatically schedule a Medical Procedure task (1) (note you can use the auto-schedule and change the task type). You can also add a new task for this animal (2) which will open a blank new task box. You can also manage previous calendar tasks for the animal (3) with the option to edit, delete or mark them as complete.





💡 Medical Records		Lamen	ess reported a	Alert for Animal: 1 Observe T01 walking T01 / Lion / ~ Measure Mountain Chicken frog len	gths T018 / Mounta	in chicken frog / ~	,T018	- = <mark>-</mark> ×
Edit Clinical Note				T02/Lion/LZH22-00002/Female 📧				
Basic Info Samples Physiolog	jical Measure	ements Calendar Ta	sks					
Add New Task								
Schedule Medical Procedure	Associate	ed Calendar Tasks						
Schedule after 14 Days	⊿ 22							
Schedule after 28 Days							3	
Schedule after 3 Months		Event Type	Date	Title	Assigned to			
Schedule after 6 Months		Sample Collection	May 10, 2022	Whole Blood / Lion / T02 / LZH22-00002	Species360 Training	<ul> <li>Mark complete</li> </ul>	N Edit	X Delete
		Medical Procedure	May 12, 2022	GA for T02	Keeper Team	✓ Mark complete	N Edit	X Delete
Schedule after 1 Year		Sample Collection	May 18, 2022	Whole Blood / Lion / T02 / LZH22-00002	Keeper 2	✓ Mark complete	N Edit	X Delete
Schedule on a Specified Date		Sample Collection	May 25, 2022	Whole Blood / Lion / T02 / LZH22-00002	Keeper Team	✓ Mark complete	N Edit	X Delete
Schedule after Days		Sample Collection	May 25, 2022	Whole Blood / Lion / T02 / LZH22-00002	Keeper Team	✓ Mark complete	🛐 <u>Edit</u>	X Delete
1		Prescription Treatment	May 28, 2022	Start Ofloxacin 0.3% Ophthalmic 3 drops once 1 doses Topical, ophthalmic / Lion / T02 / LZH22-00002	Species360 Training	✓ Mark complete	<u> Edit</u>	X Delete
	M -	Page 1 of 1	🕨 🕅   🍣	Page Size 20 Change				1 - 6 of 6

# Creating Tasks from a Full Prescription

When a new Full Prescription has been saved (or a Quick Prescription is edited), the Calendar Tasks tab becomes active. Here you can automatically schedule a repeat for the prescription which generates a Prescription Treatment task. You can also manage scheduled prescription tasks for the animal, with the option to edit, delete or mark tasks as complete.

🚱 Medical Records							Help Mer	u v 🗖 🗖 💌
Edit Prescription				T02/Lion/LZH22-00002/Female				8
Prescription Dispensing Adr	ninistratio	on Staff Instructions C	Calendar Task Treatment Response					
Repeat Prescription	Scher	duled Prescription						
Repeat after 14 Days		2						
Repeat after 28 Days		-						
Repeat after 3 Months		Date	Title		Assigned to			
Repeat after 6 Months		May 28, 2022	Start Ofloxacin 0.3% Ophthalmic 3 drops once 1 doses Topical, ophthalmic / Lion / T02 / L2H22-00002		Species360 Training	✓ Mark complete	<b>≥</b> Edt	X Delete
Repeat after 1 Year	1	A A Page 1 of 1	🕨 🕅 🖉 Page Size 🛛 20 Change					1 - 1 of 1
Repeat on a Specified Date								
Repeat after Days								

## Creating Tasks from a Sample

When a new Sample has been saved, the Calendar Tasks tab becomes active. Here you can automatically schedule a repeat Sample Collection task. You can also manage Sample Collection tasks for the animal, with the option to edit, delete or mark tasks as complete.

Medical Records							Help Menu 🗸	- e
Edit Sample								×
Details Calendar Tasks								
Schedule Sample Collection	50	hedule Sample Collection						
Schedule after 14 Days	4	2						
Schedule after 28 Days								
Schedule after 3 Months		Date	Title	Assigned to				
Schedule after 6 Months		Jun 13, 2022	Serum / Lion / T02 / L2H22-00002	Keeper Team	✓ Mark complete	N Edit	X Delete	
Schedule after 1 Year		4 4   Page 1 of 1   ▶ ▶  @ 1	Page Size 20 Change					1 - 1 of 1
Schedule on a Specified Date								
Schedule after Days								





# Calendar Tasks in Basic Info Panel

Calendar tasks will display in the Basic Info panel for any animal in focus in the Medical Dashboard.

This summary of calendar tasks will only show the upcoming 30 days and will be limited to 3 calendar tasks. To see the full list of Calendar tasks for a specific animal open My Calendar, filter by animal ID, and select List View.

😁 New 🔹 🖹 Edit 🛛 💢 Delete 🛛 🗄 Manage /	Animal Lists 🗸 🛛 🍣 Reload me	dical list   💽 Export •   🥥	Medical Reports • M	edical Apps 🔹 👩 Sample Storage			😥 My Calendar
Dashboard 2	Animal	(144 Records)	Date	Details	Responsible Stat	f 💦 🔐 Basic I	nfo
Select animal to see detail	∃ 02/08/2024					1dentifiers	GAN:CBH22-00076
A Records	EF1 / African hunti	ng dog / CBH22-00047	02/08/2024	Annual health check carried out,	🧃 Vet 1	Local ID	SC0082
Clinical notes (15)	B 14/07/2024					House name	Crush
Diagnoses & Procedures (12)	T004 / Red panda	/ CBH21-00004	14/07/2024	Clinical diagnosis : Eye, LEFT, C	DNJU Vet 1	Current Enclosure	The Deep End
Samples (57)	■ 12/07/2024					Sex	Male
Tests & Results (8)	CO082 / Green tu	rtle / CBH22-00076	12/07/2024	00:00 / Whole Blood / FEMORAL	VEIN Vet 1	Scientific Name	Chelonia mydas
Necropsy/Biopsy (4)	∃ 04/07/2024					Common	Green turtle
Physiological measurements (1)	😐 👩 SC0082 / Green tu	rtle / CBH22-00076	04/07/2024	Amoxicillin (250 mg Solid > Caps	ule) ( Sarah Lavin	- Name Birth	09/09/2020
Oiagnostic imaging	∃ 03/07/2024					Age	3Y 10M 28D
	SC0082 / Green tu	rtle / CBH22-00076	03/07/2024	00:00 / Whole Blood / /	Sarah Lavin	Arrival	09/09/2020
	SC0082 / Green tu	rtle / CBH22-00076	03/07/2024	Whole Blood / SUNSHINE LABS	/Hem Sarah Lavin	Owner 🍙	TRAINING
		000101000000	00/07/2024	Photo biodan contornale bible		Holder	TRAINING
	<ul> <li>1004 / Red panda</li> <li>T0241 / Barb / CBI</li> </ul>	124-00238	03/07/2024	Individual split from group and tre	Alicia Hann	Last Weight Add New Weight	~65 kilogram ht (03/07/2024)
					-	Collection	Primary Animal Collection
	02/07/2024 SC0082 / Green tu	rtle / CBH22-00076				Health Statu	S Abnormal (02/07/2024)
	0.27/05/2024	Cal	endar Tas	ks 📕	Add New Task	Body	Undetermined
	Multiple Animals (2)			T	Add New Table	Condition	
	T0090 / White-line	ad tamarin / CBH22	20/08/202	4 Sample Collectio	n 🍘	Score	-
	TODGO / White-lipp		20100/202	+ oumpic concent		Medical Alert	s 😲
-	(C) Touso / white-lipp	ed tamanin / CBH22	27/08/202		ent Obs 🛛 🌾	Active Proble	car Aleria Found
O Dashboard	T0090 / White-lipp	ed tamarin / CBH22	21100/202	+ Animai Assessin	ciii 003 🦉		ONS @
Clinical Notes	🙄 Export to PDF 🛛 🔪 Edit	🗙 Delete 🛛 🖲 💭	03/09/2024	4 Medical Procedu	ire 👔	Active Prescr	iptions/Treatments
Diagnoses & Procedures	GAN P	referred ID				No Active Pres	criptions/Treatments Found
	G CBH22-00076 S	C0082 Chelonia	mydas/Green turtle	Male 09/09/20	3Y 9M 24D	Active Enclos	ure Prescriptions
Prescriptions/Treatments	- Sample Detail			Sample O	uality	No Active Encl	osure Prescription Found
C Samples	Collection Date/Time	03/07/2024 12	2:00 AM	Addition	al Characteristics	Calendar Tas	ks 🔶 Add New Task
👍 Tests & Results	Sample Type	Whole Blood		Degrade	bd	20/08/202	Sample Collection
•	Anatomical Source/Tiss	ue ~		- Dro Como	ing Conditions	27/08/202	Animal Assessment Obs
💋 Anesthesia	Additives/Preservatives	~		- Pre-Samp	ing conditions	03/09/2024	Medical Procedure
Physiological Measurements	Collection Method	~		Fasting	Duration < 2 hours		
· · · · · · · · · · · · · · · · · · ·	Reason	Saran Lavin		Restrain	t Type Physica	-	
#h +	10.03011						

# Medical Alert in Basic Info Panel

To **add** a Medical Alert that displays in the right side of the Medical Dashboard when an animal is selected, you must add a Clinical Note for that animal. Choose radio button for: Notes/Examinations/Report Entry and note type = Medical Alert.







To **edit** exiting Medical Alerts, search with the clinical notes search filter for Medical Alerts.

🚺 Medical Records									i X
🤭 New 🔹 🔚 Manage Animal Lists 🔹 🦧 Rela	oad medical list		edical Report	s • Medical Apps •				😥 My	Calendar
Clinical Notes Simple Search	Anima	1 (14	Records)	Date	Details	Res	asic I	info	
Animal Please select	- Sec. 11, 111	/ Mandrill /		Sep 16, 2022	A 🧃	s	Identifiers Local ID Current		-
Note Author	🖃 Jun 16, 2 14		_	Jun 16, 2014	D 2		Enclosure Sex	Female	
Please Select				Jun 16, 2014	D 🧃	ε	Scientific	Mandrillus sphinx	_
Include obsolete staff	Ð			Jun 16, 2014	D 🥥	E	Common	Mandrill	-
Clinical Note Type				Jun 16, 2014	D 🧃	-	Birth		_
Q Search				Jun 16, 2014	D 2	c	Age Arrival		- 1
Clinical Notes Advanced Search	Ð		÷	Jun 16, 2014	D 🧃	ſ	Owner 2		_
Dashboard	Export to LOF	F 👘 View Sample 👘 Vi	ew Measuren	ient	□ Ma	ximize	Last Weight Add New Weight	~14.3 kilogram (Sep 12 2020)	2,
Diagona & Procedures	GAN	Preferred ID	Taxonon	ıy	S	ex	Collection	Main Institution Animal Collection	
Prescr tions/Treatments	G	Time	Mandrillu	s sphinx/Mandrill	Fe Author	emale	Health Status	Normal (Aug 16, 2018)	
(T) Samples	Sep 16, 2022 Significant	00:00:0 Private	0	Spec	ies360 M ve Probl	embe ems	Body Condition Score	3/9 (Nov 01, 2018)	-
😢 Tests & Results	NO	NO		210	nugh		Medical Alert	ts	
Anesthesia	Note Subty	Medical alert					灾 Sep 16, 20	22 ALERT TEXT GOES	HERE
Physiological Measurements	Notes/Comme	ents					Active Proble	Right hand	0
Mecropsy/Biopsy	ALENT TEXT GU	ALD HERE!					Cough	, rogint hand	6

To **Delete** existing Medical Alerts, after searching for the record as described above, either delete the original alert, or change the note type from Medical Alert to another type to remove it from the Medical Alerts section on the Basic Info panel. *Back to Topics* 

# Marking Calendar Tasks as Complete

It is good practice to mark completed tasks as complete to keep your records clean. To mark as complete in <u>Calendar View</u>, simply double click any entry in the calendar and click "Mark Complete".





Task/Event Type	Animal Assessment Observation Priority Medium – 2		^
Animal(s) *	B10013/Northern helmeted curassow/MIG12-28473973 x 880344/Yellow-spotted Amazon River turtle/5518713 x		
When *	Jul 06, 2015 🖸 to Jul 06, 2015 🖸 🖌 All day		
Assigned To *	Christy Belcher   Additional Staff Please Select	~	
Title	B10013 / Northern helmeted curassow / MIG12-28473973 Strongid Paste treatment is complete		
Notes	Note Templates 🗸 🔘 🔒	Ş	
		^	
		~	~
Wark complete	Repeat/Clone Prescription Save Delete Car	icel	

If you have marked a task as complete by mistake you can check the Mark Incomplete button to make it active again.



To mark entries as complete in <u>List View</u>, simply click the checkbox within the Done column (1). To view or hide your completed tasks, toggle the Hide Completed Tasks box on and off within the Search.

😰 My Calendar												
Add New Task												
Calendar Items Search 😲	Ca	Calendar Item Search Results										
Responsible Party 😨		Done	Date		Entity Name	Event Type	Title					
Please Select 👻			May 02, 2022	() 🕲	T01   Lion	Animal Alert	Lameness repo					
Date Range			May 03, 2022	😂 🌔	T01   Lion	Animal Assessment Obse	Observe T01 w					
From			May 04, 2022	😂 🌔	T018   Mountain chicken frog	Animal Measurement	Measure Moun					
		<ul> <li>Image: A set of the set of the</li></ul>	May 08, 2022		PP1	Enclosure Alert	Pool level redu					
To	1	~	May 10, 2022	😂 🌔	T02   Lion	Sample Collection	Whole Blood / I					
			May 11, 2022	😂 🌔	T01   Lion	Medical Procedure	GA planned for					
			May 11, 2022	() 🕄	T03   Lion	Sample Collection	Plasma / Lion /					
			May 12, 2022	() 😒	T03   Lion	Sample Collection	Whole Blood / I					
Animal IDs			May 12, 2022 12:00 - 1	۱) 😌	T02   Lion	Medical Procedure	GA for T02					
Please select			May 15, 2022	() 🕄	T04   Red panda + 1 more	Sample Collection	Urine / Red par					
Enclosure			May 17, 2022	۱) 🍪	T01   Lion	Animal Alert	okp					
Search Enclosure			May 18, 2022	۱) 🍪	T03   Lion	Animal Alert	ddd					
			May 18, 2022	۱) 🍪	T02   Lion	Sample Collection	Whole Blood / I					
Include Enclosures Below	May 23, 2022 🚳 🌍 T019   Mountain chicken from	T019   Mountain chicken frog	Pathology	Perform pathole								
	May 23, 2022         PP1         Enclosure Treatment Task         Treat           May 25, 2022              ⓐ              ⓑ	Treat water with										
🗌 Hide Complete Tasks 🛛 🔽		Whole Blood / I										
			May 25, 2022	6	T02 LLion	Sample Collection	Whole Blood / I					

If you have marked a task as complete by mistake, make sure you Show Completed Tasks, and then you can un-check the checkbox within the Done column to make it active again.





You can also mark calendar tasks as complete for a specific animal from the <u>Clinical</u> <u>Note, Full Prescription</u> and <u>Sample</u> Calendar Task tabs.

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# **Exporting Calendar Tasks**

Exporting calendar items is only available via a report in ZIMS for Medical currently. Within the Medical Reports menu, choose Calendar Items Report.

1 of 7 > Export t	o the selected format	🖯 Export 😘 🔐	
S         M         T         W         T         F         S         I           0         0         10         02         03         04         03         04           0         5         66         07         08         09         10         11         8         10         02         03         04           0         20         21         22         23         24         25         17         131         1	á         T         W         T         F         S           01         02         01         02         04         05         06         07         08         09         11         12         13         14         16         16         8         19         02         21         22         23         52         26         27         28         29         30	Calendar Item Report For: 01/Apr/	1s Report (2020 - 30/Apr/2020 Carylight Species100, 2021, Al rights marred.
Wednesday, April 1,	2020		
Scheduled Tasks			
No da	ita found using the selecte	ad filters.	
Additional Tasks			
Animal ID	Enclosure	Туре	Title Assigned
11679/Coyote/MI	SA4-2	Animal Assessment Observation	1679 / Coyote /
11374/Malayan tayan	LT111	Animal Assessment	1 74 / Malayan tapir /
		Observation	Calendar Items Report
Thursday, April 2, 20	20		
Additional Tasks			
Animal ID	Enclosure	Туре	🐂 🕑 Run Report 🛛 Favourite Search Filters 🔷 🎯 🚽 🏈
12037/Alaska sea 29770307	-	Animal Assessment Observation	NOTE: Recently entered data may not appear on reports for 180 seconds after it
14579/Striped sku		Animal Assessment	Date Range *
14579/Striped sku	-	Animal Assessment	From To
13913/Moose/RC\	-	Observation Animal Assessment	
13913/Moose/RC)		Observation	
13913/M0056/RCV		Observation	All Animal(s) Taxonomy
F-1-1 A11-0, 00000			- · · · · ·
Friday, April 3, 2020			Include Calendar Event Types
Additional Tasks	Enclosure	Tune	Animal Alert 🗹 Animal Assessment Observation
13025/Crested wood partridge/	MIG12 Penguin Holding	Animal Assessment	- Animal Measurement 🗹 Enclosure Alert 🗹 Medical Procedure
		Observation	Sample Collection Prescription Treatment Pathology
14579/Striped skunk/L		Animal Assessment	Enclosure Treatment Task
		Observation	
Saturday, April 4, 202	20		
Additional Tasks			Include Notes
Animal ID	Enclosure	Тире	Assigned to
			Please Select

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Additional help: More on <u>My Calendar (powerpoint)</u>

Revised 6 August 2024