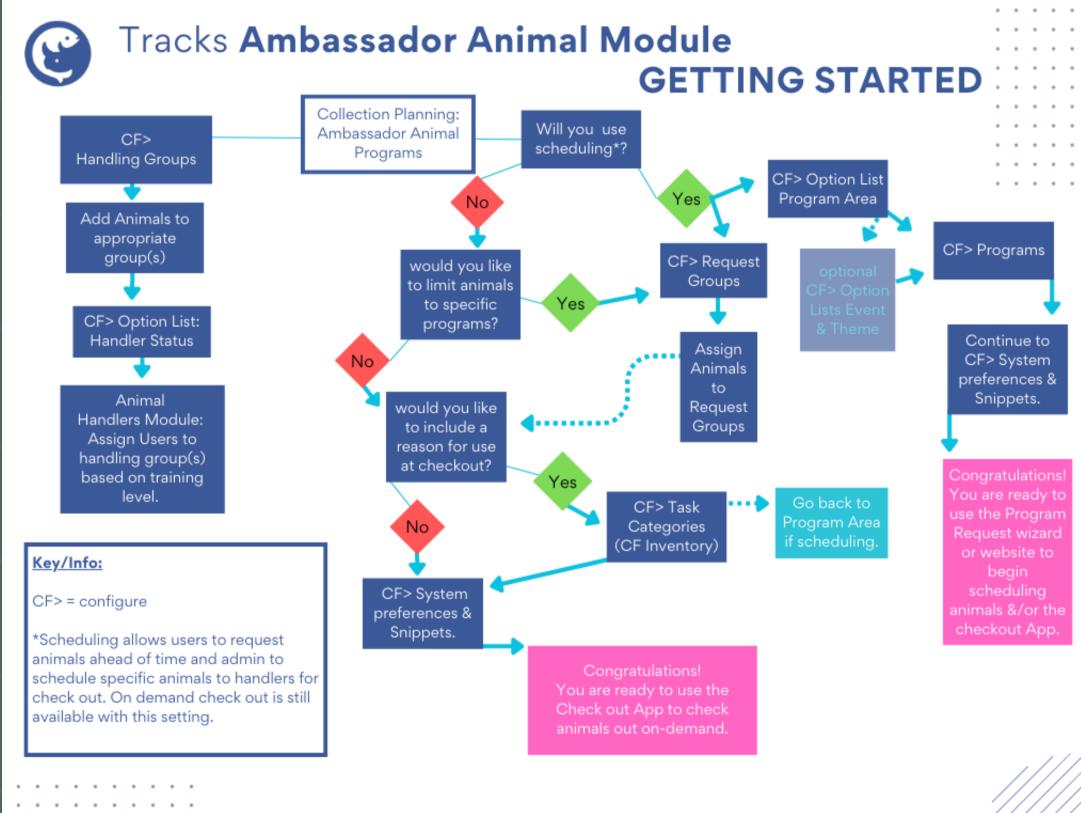
RABASSADOR RAIRARS SET-UP

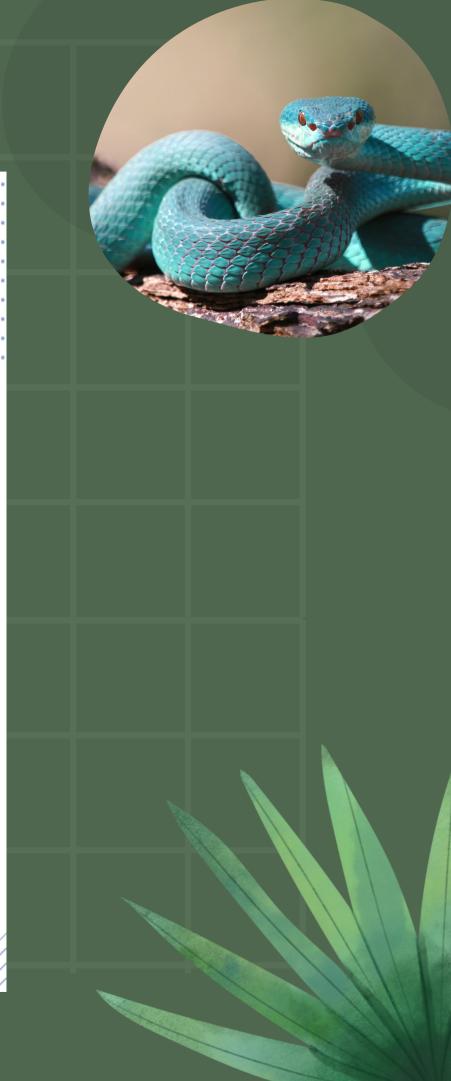




GETTING STIRTED



TRACSKCOMMUNITY.COM



CF> Handling Groups

Add Animals to appropriate group(s)

CF> Option List: Handler Status

Animal Handlers Module: Assign Users to handling group(s) based on training level.

CORFGURMON **1. Configure Handling Groups**

3. Configure Handler Status

4. Assign users to handling groups with correct status



2. Add animals to Handling Groups

Handling groups limit access when checking out animals. You can group by level of training needed, taxonomy, or program type.

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Ĩ	Hospital	•	🤏 ট 🤶 🖂 🆓 Case 🗸
	Lab	•	
'n	Collection	►	Ambassador Animal Programs
su	Animal Data Sharing		Biofacts
s	Daily Wizard		Collection Planning
Pa	Institutions		Dive Log
h 1	Media		
Ba	Operations		
	Reports		
Fa	Roles		
	System		
	Taxonomy		
	Triggers		
	User Security		
	Validation Manager		
-			

Configure Ambassador A	ni	mal Programs
Handling Groups Ambass	ad	or List Programs Option Lists
Show Inactive Sequence		New Handling .oup
🚦 Group Name	Sta	Details Animal List
Aquatic Group	Ac	
Venomous Snakes	Ac	Group Name
Big Teeth Group	Ac	
Alligators	Ac	
Ball Pythons	Ac	Use 0 or blank for no limit.
Hawks	Ac	
Hermit Crab	Ac	Refresh Days
Reptiles	Ac	The number of days a Handling Allow
Salamanders	Ac	
SD Cows	Ac	Active Group
sea cucumber	Ac	-
Sea Star	Ac	Handling Group is Active (available
Sea Urchin	Ac	Comment
Turtles	Ac	
Yellow	Ac	
Arctic	Ac	
Birds	Ac	
Catfish	Ac	
Colorado animals	Ac	
Colorado animals advan	Ac	
Bats	Ac	
Very advanced trainers	Ac	
Mongeese	Ac	
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System Preferences Snippets

ved status is valid before a refresher is required. Use 0 or blank for no limit.

le for selection)

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	COLUMN TO A STATE



Adding Animals to the Animal List Tab for each handling group creates your Ambassador List.

CORFERRIOR

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ndling Groups	_	ador List	t Programs Option Lists System Preferences Snippets	
how Inactive S	Sequence	ļ		
Group Name		Status	Comments	Sort Order
quatic Group		Active	Edit Handling Group	
enomous Snake	is in the second se	Active		
ig Teeth Group		Active	Details Animal List	
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Reptiles		Active	* American alligator : ALLISON	
Salamanders	0.0		nbassador Animal Programs	
	Handli	ing Grou d Filters	ps Ambassador List Programs Option Lists System Preferences Snippets	5
		ndling Gr		
		nunng u	oups <u>Refine Filter</u> [⊘] • <u>Customize Columns</u> • <u>Save Filter</u> • 118 records	
		_	imal Species Name / Handling Groups	
		elect Ani		
	Batch S	elect Ani Wh	imal Species Name / Handling Groups	
	Batch S	elect Ani Wh Ro	imal Species Name / Handling Groups hitespotted bamboo shark : JAWS Small Sharks Group	
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CORFERRICA

Create you progression for Handler Status. This allows you to limit which animals each handler can check out.

		· · ·					
Configure Ambassador Animal Prog	grams						
andling Groups Ambassador List Programs Option Lists System Preferences Snippets							
Select Option List 🖂 Record Options	Select Option List 🔻 Record Options 👻 Export 🗸 چ Quick Filter						
Now viewing the Handler Status options	list. Hide Inactive • Customize Columns •	5 records					
Option Item / Comments		Status	Community Option Name				
Trained	Edit Handler Status	·					
Refresher Needed							
Mentor	Status Name						
Currently being trained	Refresher Needed						
Approved to be trained	Abbreviation						
	R						
	Handling Allowed	ilabla far abaalı	out to bondlor on kin				
	- unindis dio dia		OUL TO HAMUIEL OF KID	SK			
	Active Code						
	Handler Status is Active (available for s	selection)					
	Comments						
figure Ambassador Animal Programs Idiing Groups Ambassador List Programs Option Lists System Preferences Snippets Iect Option List Record Options Export Quick Filter w viewing the Handler Status options list. Hide Inactive Customize Columns Status Community Option Name Edit Handler Status I Active (available for check out to handler on Kiosk Edit Handler Status I Active (available for selection) Edit Handler Status I Active (available for selection) Edit Handler Status I Active (available for selection)							
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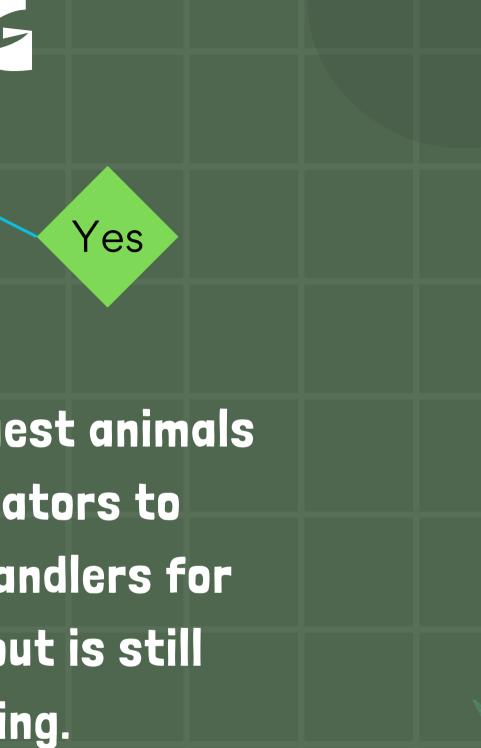


PLARARE

Will you use scheduling?

Scheduling allows users to request animals ahead of time and administrators to schedule specific animals to handlers for check out. On demand check out is still available with this setting.

No



PLARARE

Will you use scheduling?

No

 If you would like to <u>limit animals to specific programs</u> your next step is to <u>configure request groups</u>. • If not, do you want to include a reason for check out? Then you will <u>configure Task categories</u>. • If you would like to include a note at check in or check out with prompts you should <u>configure snippets</u>. Once you have decided on these 3 options you are ready to use the check out app on-demand.



Configure Ambassad	or Animal Progran	ns						
Handling Groups Am	Handling Groups Ambassador List Programs Option Lists System Preferences Snippets							
Select Option List 🖂	Select Option List 🗸 Record Options 🗸 Export 🗸 چ Quick Filter							
Now viewing the Ambas	sador Request Group	options list. <u>Hide Inactive</u> • (Customize Columns •	57 records				
Option Item	∇ Comments		Status	Community Option Name				
09B1A			Inactive					
A Mongoose Group	Must be 3rd year	r volunteers to request.	Active					
A09028		Edit "Ambassador Request Group	a" Item					
A09038		Ealt Ambassador Request oroup	, nem					
Africa	Animals from Afr	Description						
Amphibians		A Mongoose Group						
Aquatic		Active Option						
Arctic	Cold adaptation	Option Item is Active (availa	able for selection)					
Arizona	Use a demandia a s	Comments						
Bats		Must be 3rd year volunteers	to request.					
Beetles		, i						
Bighorn								
Bird								
Pluo	Must have 1 year							

Cancel

ave

• Create your list of request groups in the option lists configuration area.

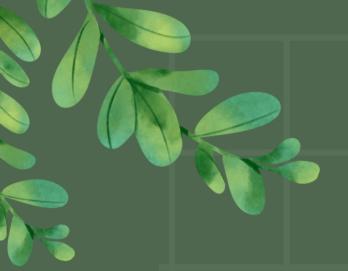


• Add animals to one or more request groups on the Ambassador List Tab.

Configure Ambassador Animal Programs							
Handling G	roups Ambass	ador List Pro	grams	Option	Lists	System Pre	eferences
Saved Filt	ers 🗸 🗐 Recor	d Options 🗸 🗹	Ex	port v	Sa Quic	k Filter	
All Handlin	g Groups <u>Refine</u>	Filter [<mark>ଡ</mark>] • Cu	stomize	e Column	<u>is • Sav</u>	<u>ve Filter</u> •	118 records
Batch Select	Animal Species N	lame		1	Handlin	g Groups	
	Zapata sparrow :	A07056			Colorad	lo animals,	Colorado an
	Wolf/coyote/jack	al/dog : A22-002	2-		Colorad	lo animals	
	Whitespotted ba	mboo shark • IA\	WS		Small SI	harks Grow	n
	Wasp : A20052	😧 Edit Ambassa	idor Anin	nal			
	STRIPED MOUN	Request Group	s Hai	ndling Gr	oups		
	Star-eyed hermi				oaps		
	Sparrow : 09B1A	Request Group	s for 02	0			
	Southern sea ot	× Colorado					
	Slider turtle : 01						
	SLENDER MON						
	SEA CUCUMBER						
	Scrub robin : MI	Add a Request	Group				
	Scrub robin : DC	-	-				
	Scrub robin : A1	A Mongoose Gi					
	Scrub robin : A1	A Mongoose G Africa	roup				
	Scrub robin : A0	Amphibians					
	Scrub robin : 555						
	Royal/ball pythor	Arctic					
	RED-TAILED HAW	Arizona					
	RED-TAILED HAW	Bats					
		Deedes			Zobrac		

nippets

	Accession Number		Request Groups	^
nimals advanced	A07056		Bird, Colorado	
	020		Colorado	
	TEST06		Small Sharks Group	
_		<		
			Arctic, Bird, Fowl	
			Aquatic	
		_	09B1A	
			Western States	
			Reptiles, River Scout, Slider T	
			A Mongoose Group, Africa	
			Aquatic	
			Bats, Bird	
			Bird, Fowl, Green Group	
		 Image: A set of the set of the	Bats, Bird	
	^		Africa, Bats, Beetles	
	el		A09038	
			Fowl, Green G.	
			Snakes	
			Arctic	1
	~			
	050200		Zohrac	



• If not, do you want to include a reason for check out? Then you will configure Task categories.

Task categories

 are configured
 in the Configure

 Inventory
 Section.

ł				<u> </u>			<u>III</u>
(Coi	nfigure Inventory	Section				
	Op	otion Lists System	Preferences	5			
	S	elect Option List 🖂	Record Op	tions 🗸	Export 🗸	am 🕹	
		Animal Journal Cate	egory	ory opti	ons list. <mark>Sh</mark>	ow Inactiv	<u>e • C</u>
[Collection Name		5			
		Contraception Met	hod				
		Credential Organiz	ation				
		Currency					
		Custom Query Cate	egory				
		Egg Media Type	_				
		Entity Task Categor	у				
		Identifier Type					
		Institution Category	/				

Customize Columns • 27 records

Status	Option Item /
Active	Program
Active	Education Program
Active	Ambassador Rest/Recovery



Back in Configure Amb. Animals go to System preferences and set the reasons for check out.

Configure Ambassador Animal Programs Handling Groups Ambassador List Programs System Preferences Option Lists Snippets Checkout App: Include animals that handlers are not approved on in all animal list Checkout App: Include Reason for Use when checking out Checkout App: Include Reason for Use when checking out Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Reason for use task categories available when checking out To add another option to this list: The master list of tasks is managed in the Configure Inventory Section module (go to Configuration | Inventory | Inventory Section) a choose the Entity Task Category on the Option Lists tab. Education Program, Training Chec Handlers: Default status when adding a user to a handling group. Approved to be trained Handlers: Refresh status automatically reset when required. Handlers: Refresh status automatically reset when required. \square Handlers: Refresh status code used on automatic reset. \checkmark Refresher Needed \Box Task category used for animals blocked for rest/recovery To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. \Box Ambassador Rest/Recovery \square Task category used for scheduled programs To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. \Box Education Program \square Task category used for unscheduled animal checkout To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab.



ckout App: Reason for use task categories available when ch	ecking out
Action Plan	^ -
Ambassador Rest/Recovery	
Animal Training Session	
Education Program	-
Fecal Submission	
Feeding	
Husbandry	
Lab	
Maintenance	
Maintenance - Animal Welfare	
Maintenance - Change UV Bulbs	
	2 76

 If you would like to include a note at check in or check out 						
with prompts you s	should confi	gure snippets.	You can create			
	<u></u>		prompts for			
Configure Ambassador Animal Programs			check out notes			
Handling Groups Ambassador List Programs Option Lists	System Preferences	Snippets				
Select Snippet Type \vee Select Site 🗸			and check in			
Snippet List for Check Out at Loose Chicken Petting Zoo			notes			
Name / Text						
weather Today's weather is:	Configure Ambacca	dor Animal Programs	······································			
Problem Missing a collar or tag.	Configure Anibassa					
Gotcha Taking this one.	Handling Groups A	mbassador List Programs Option Lists	System Preferences Snippets			
Equipment Indicate whether you took any special equipment for	Select Snippet Type	✓ Select Site ✓				
Capture This one is a little hard to catch.		In at Loose Chicken Petting Zoo				
	Name /	Text				
	Superness	Animal was having a great time.				
 see also system 	Suggestion	This would make things better:				
• SEE UISU SYSLEIII	Rest	Needs a day of rest				
preference to turn on/off	Length Attendance	Event was minutes of animal handling. There were participants in attendance.				
	alarm	Describe out of ordinary conditions or beh	avior I			
notes during check out.	Aggression	Animal showed aggressive behavior today				
		Animal showed aggressive bellavior today				

include a	note at check in o	ote at check in or check out		
hould con	figure snippets.	• You can create		
		prompts for		
		check out notes		
System Preference	es Snippets	and check in		
		notes		
Configure Ambas	sador Animal Programs			
Handling Groups	Ambassador List Programs Optic	nbassador List Programs Option Lists System Preferences Snippets		
Select Snippet Typ	Snippet Type \vee Select Site 🗸			
Snippet List for Che	eck In at Loose Chicken Petting Zoo			
Name	/ Text			
Superness	Animal was having a great time.			
Suggestion	This would make things better:			
Rest	Needs a day of rest			
Length	Event was minutes of animal handl	Event was minutes of animal handling.		
Attendance	There were participants in attendance.			
alarm	Describe out of ordinary conditions or behavior:			
Aggression	Animal showed aggressive behavior	Animal showed aggressive behavior today		

PLAARG

Will you use scheduling?

- First, configure request groups.
- Do you want to include a <u>reason for check out*</u>? Then you will <u>configure Task categories</u>.

Yes

- Configure Program Areas
- Optional* <u>configure Programs, Events, and Themes.</u>
- If you would like to include a note at check in or check out with prompts you should configure snippets.

*optional items are used in program request wizard to align the correct animal with the schedule. If you would like to Track information on programs delivered use "reasons for check out"



Configure Ambassad	lor Animal Program	ns			
Handling Groups Ar	nbassador List Prog	grams Option Lists System	n Preferences Snip	pets	
Select Option List 🗸	Record Options 🗸	Export 🗸 🍓 Quick Filter]		
Now viewing the Amba	ssador Request Grou	poptions list. <u>Hide Inactive</u> • (Customize Columns •	57 records	
Option Item	∇ Comments		Status	Community Option Name	
09B1A			Inactive		
A Mongoose Group	Must be 3rd yea	r volunteers to request.	Active		
A09028		Edit "Ambassador Request Group	"Item		
A09038		care Ambassador Acquest oroup			
Africa	Animals from Afr	Description			
Amphibians		A Mongoose Group			
Aquatic		Active Option			
Arctic	Cold adaptation	Option Item is Active (availa	ble for selection)		
Arizona	Hot adaptations	Comments			
Bats		Must be 3rd year volunteers	to request.		
Beetles		· ·			
Bighorn					
Bird					
Rhuo	Must have 1 year				

Cancel

ave

• Create your list of request groups in the option lists configuration area.



If not, do you want to include a reason for check out? Then you will configure Task categories.

Task categories

 are configured
 in the Configure
 Inventory
 Section.

(Coi	nfigure Inventory Section	
[Op	otion Lists System Preference	25
	S	<mark>elect Option List 🖂</mark> Record C	ptions 🗸 Export 🗸 🌺 am
		Animal Journal Category	ory options list. Show Inactive • C
Γ		Collection Name	5
ŀ		Contraception Method	
		Credential Organization	
		Currency	
		Custom Query Category	
		Egg Media Type	
		Entity Task Category	
		Identifier Type	
		Institution Category	

Customize Columns • 27 records

Status	Option Item /
Active	Program
Active	Education Program
Active	Ambassador Rest/Recovery

 Back in Configure Amb. Animals go to System preferences and set the reasons for check out.

This information can be queried in the All Tasks Module.

Checkout App: Include animals that handlers are not approved on in all animal list Checkout App: Include Reason for Use when checking out Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Include the page for program information when checking out an unscheduled item Checkout App: Include the page for program information when checking out Checkout App: Reason for use task categories available when checking out To add another option to this list: The master list of tasks is managed in the Checkout App: Reason for use task categories available when required. Handlers: Refresh status automatically reset when required. Handlers: Refresh status automatically reset when required. Handlers: Refresh status automatically reset when required. Refresher Needed Task category used for animals blocked for rest/recovery To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Ambassador Rest/Recovery Task category used for scheduled programs To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab.	Handling Groups Ambassador List Programs Option Lists Syst	em Preferences Snippets	
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Approved to be trained Handlers: Refresh status automatically reset when required. Handlers: Refresh status automatically reset when required. Handlers: Refresh status code used on automatic reset. Refresher Needed Task category used for animals blocked for rest/recovery To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Task category used for scheduled programs To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab.	Education Program, Training	Checkout App: Reason for use task categories available when checking our	t
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Handlers: Refresh status automatically reset when required. Ambassador Rest/Recovery Handlers: Refresh status code used on automatic reset. Animal Training Session Refresher Needed Education Program Task category used for animals blocked for rest/recovery Fecal Submission To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Husbandry Task category used for scheduled programs Lab To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Maintenance Maintenance Maintenance Maintenance	Approved to be trained	Action Plan	
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Task category used for animals blocked for rest/recovery Feeding Husbandry To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Husbandry Ambassador Rest/Recovery Task category used for scheduled programs To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab. Maintenance Maintenance - Animal Welfare Maintenance - Animal Welfare Maintenance Main	Refresher Needed		
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To add another option to this list: The master list of tasks is managed in the choose the Entity Task Category on the Option Lists tab.	Task category used for scheduled programs		
		e Maintenance	
Education Program		Maintenance - Animal Welfare	
Maintenance - Change UV Bulbs	Education Program	– 🗌 Maintenance - Change UV Bulbs	
Task category used for unscheduled animal checkout	To add another option to this list: The master list of tasks is managed in th		



<u>Program Area:</u> Configure in Option List (Amb. Animals), Must have at least one.

<u>**Program Event</u>: Configure in Option list, Optional to include.**</u>

<u>Program Theme:</u> Configure in Option list, Optional to include.

<u>Programs</u>: Build Programs on the Programs Tab, you will set defaults here, must have at least one program built for scheduling.

 If you would like to 	o include a n	ote at check in or ch	eck out
with prompts you s	should config	gure snippets.	You can create
]]		prompts for
Configure Ambassador Animal Programs			check out notes
Handling Groups Ambassador List Programs Option Lists	System Preferences	Snippets	
Select Snippet Type \vee Select Site 🗸			and check in
Snippet List for Check Out at Loose Chicken Petting Zoo			notes
Name / Text			
weather Today's weather is:	Configure Ambacca	dor Animal Programs	,
Problem Missing a collar or tag.	Configure Ambassa	aor Animai Programs	
Gotcha Taking this one.	Handling Groups Ar	mbassador List Programs Option Lists	System Preferences Snippets
Equipment Indicate whether you took any special equipment for	Select Snippet Type	✓ Select Site ✓	
Capture This one is a little hard to catch.		n at Loose Chicken Petting Zoo	
	Name /	Text	
	Superness	Animal was having a great time.	
 see also system 	Suggestion	This would make things better: Needs a day of rest	
- See uisu system	Rest	Event was minutes of animal handling.	
preference to turn on/off	Length Attendance	There were participants in attendance.	
	alarm	Describe out of ordinary conditions or beha	avior: I
notes during check out.	Aggression	Animal showed aggressive behavior today	
		Annual showed aggressive benavior today	

include a	note at check in o	ote at check in or check out		
hould con	figure snippets.	• You can create		
		prompts for		
		check out notes		
System Preference	es Snippets	and check in		
		notes		
Configure Ambas	sador Animal Programs			
Handling Groups	Ambassador List Programs Optio	mbassador List Programs Option Lists System Preferences Snippets		
Select Snippet Typ	Select Snippet Type \vee Select Site \vee			
Snippet List for Che	eck In at Loose Chicken Petting Zoo			
Name	/ Text			
Superness	Animal was having a great time.			
Suggestion	This would make things better:			
Rest	Needs a day of rest			
Length	Event was minutes of animal handli	Event was minutes of animal handling.		
Attendance	There were participants in attendance.			
alarm	Describe out of ordinary conditions or behavior:			
Aggression	Animal showed aggressive behavior today			

FIRIAL CORSIDERATIONS

system preferences: viewing options

system preferences: Check out app: checklist system preferences: Task Category settings

Set up Blocking Tasks and/or Rest periods

system preferences: Handler preferences Determine user training needs

POSSIBLE TRAIRIGS

- Program Request Wizard/App (staff/volunteers)
- Check out/in Kiosk (staff/volunteers)
- Ambassador Animal Scheduling module (program Admin)
- All Tasks for Ambassador Animals (program Admin)
- User Security-more on Animal Handlers (program Admin)

QUESTIORS RESOURCES

www.trackscommunity.com

support@trackssoftware.com



