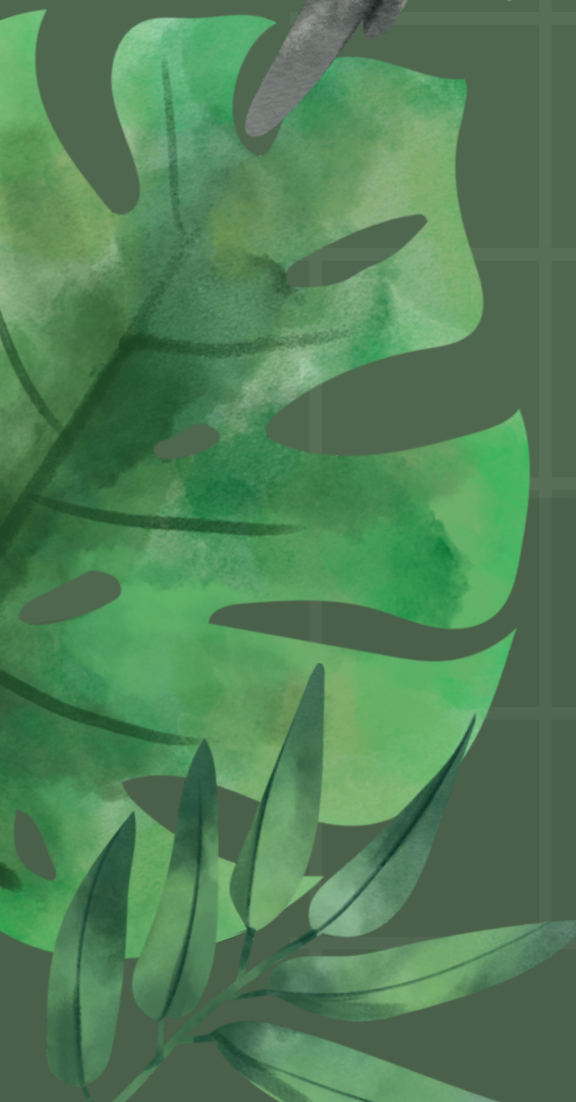




AMBASSADOR ANIMALS SET-UP



Tracks Software

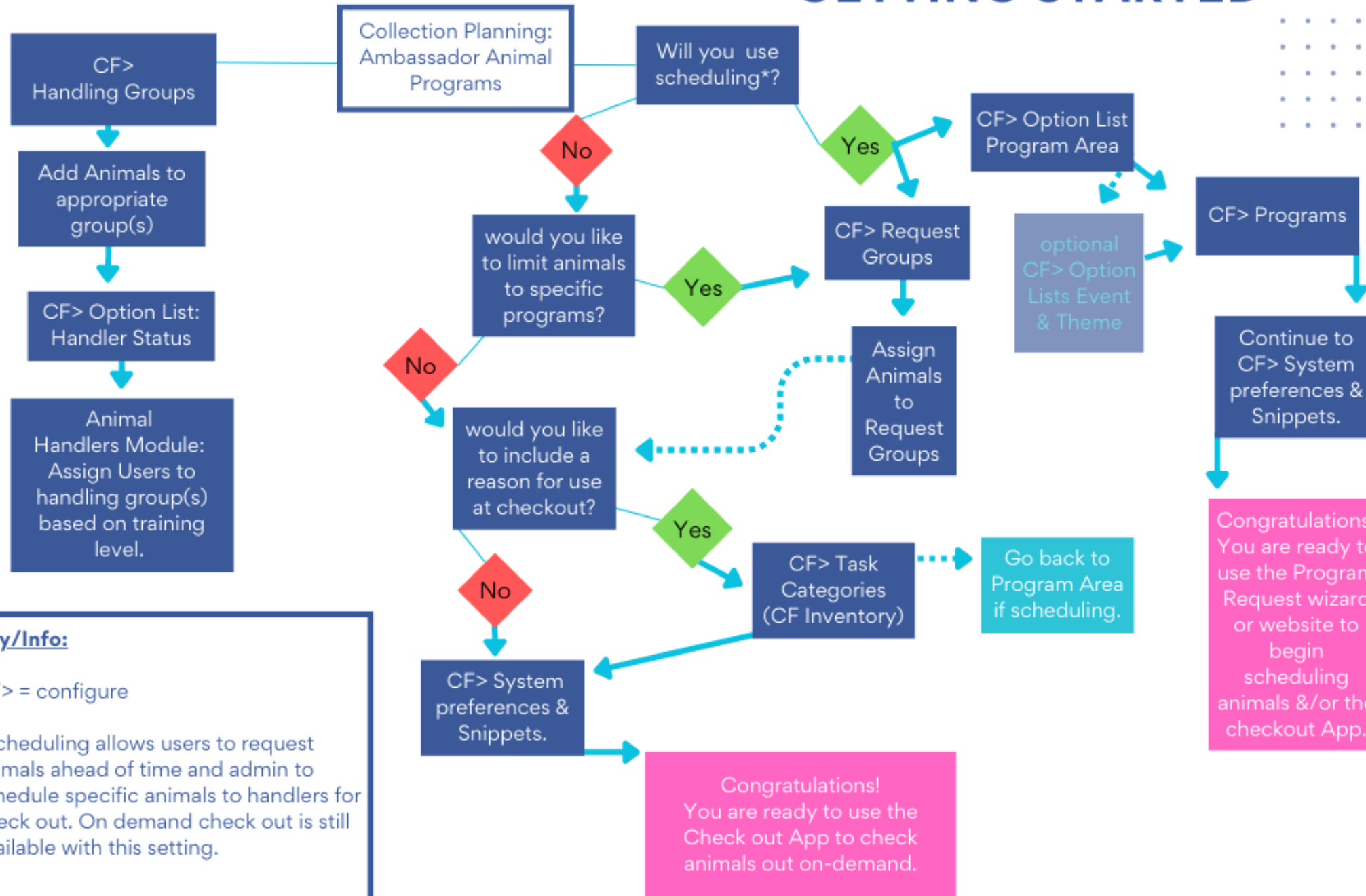


GETTING STARTED



Tracks Ambassador Animal Module

GETTING STARTED



Key/Info:
 CF> = configure
 *Scheduling allows users to request animals ahead of time and admin to schedule specific animals to handlers for check out. On demand check out is still available with this setting.

CONFIGURATION

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.

1. Configure Handling Groups

2. Add animals to Handling Groups

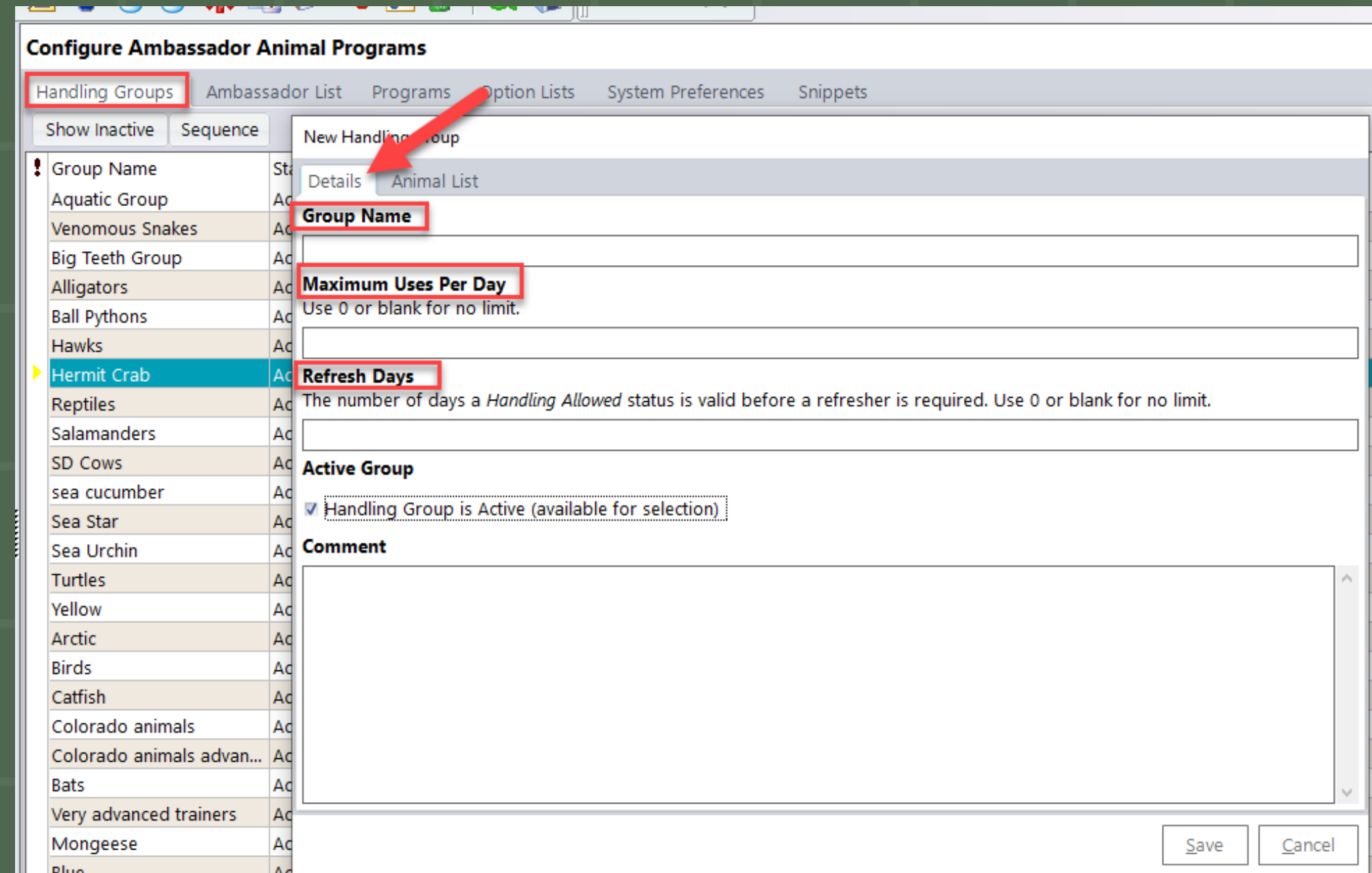
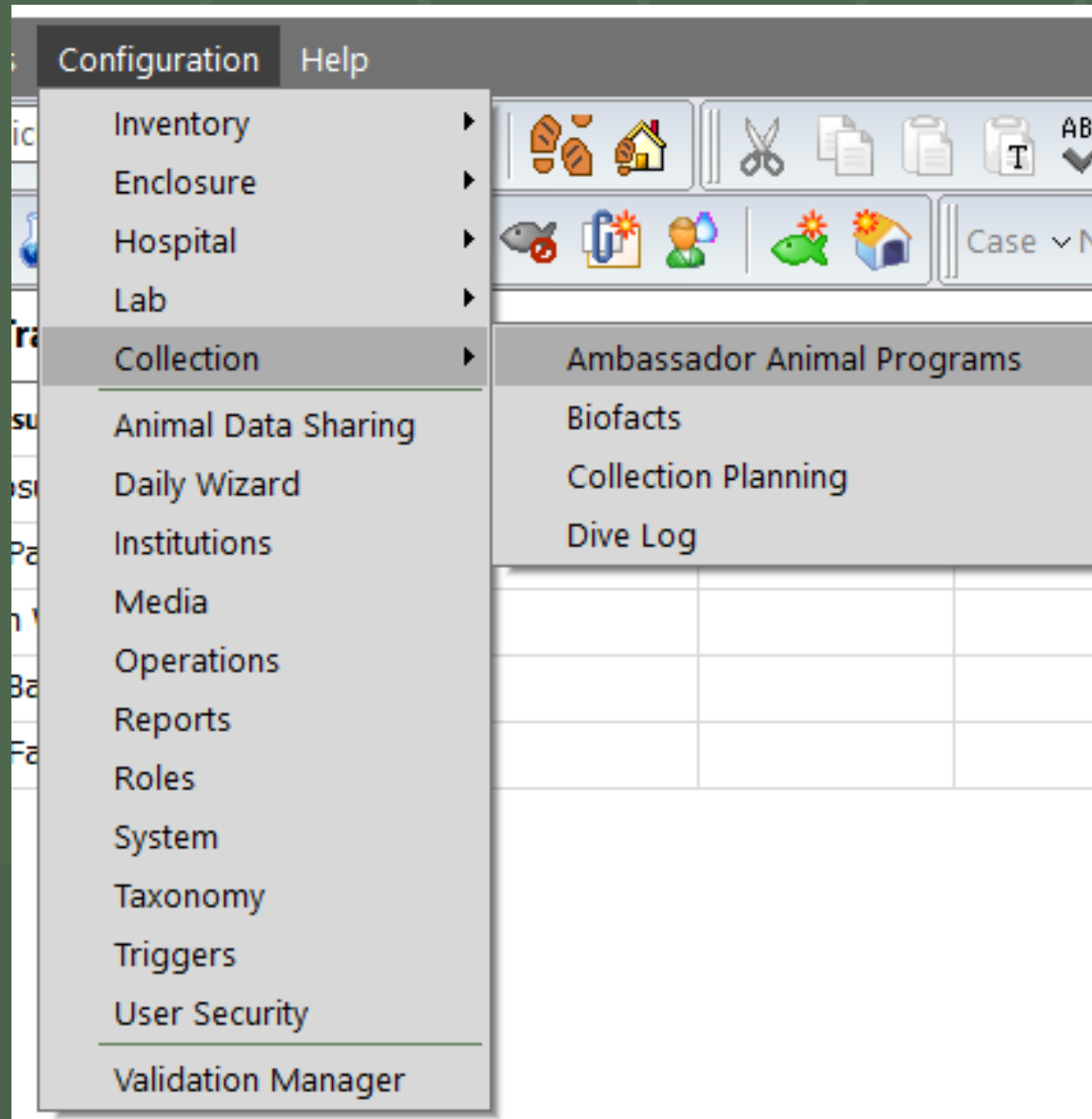
3. Configure Handler Status

**4. Assign users to handling groups
with correct status**

CONFIGURATION

Handling groups limit access when checking out animals.

You can group by level of training needed, taxonomy, or program type.



CONFIGURATION

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

Configure Ambassador Animal Programs

Handling Groups | Ambassador List | Programs | Option Lists | System Preferences | Snippets

Show Inactive | Sequence

Group Name	Status	Comments	Sort Order
Aquatic Group	Active		
Venomous Snakes	Active		
Big Teeth Group	Active		
Alligators	Active		
Ball Pythons	Active		
Hawks	Active		
Hermit Crab	Active		
Reptiles	Active		
Salamanders			
SD Cows			

Edit Handling Group

Details | **Animal List**

Add Animal ▾

Animal	Pre-packaged
✗ American alligator : AL	<input type="checkbox"/>
✗ American alligator : ALLISON	<input type="checkbox"/>

Configure Ambassador Animal Programs

Handling Groups | **Ambassador List** | Programs | Option Lists | System Preferences | Snippets

Saved Filters ▾ | Record Options ▾ | Export ▾ | all

All Handling Groups | [Refine Filter](#) [✓] • [Customize Columns](#) • [Save Filter](#) • 118 records

Batch Select	Animal Species Name	Handling Groups
<input type="checkbox"/>	Whitespotted bamboo shark : JAWS	Small Sharks Group
<input type="checkbox"/>	Royal/ball python : CRYSTAL	Ball Pythons
<input type="checkbox"/>	Penguin : SQUALL	Arctic, Birds, Blue, Penguins
<input type="checkbox"/>	GROTTO SALAMANDER : SALLY	Salamanders
<input type="checkbox"/>	Grevy's zebra : TECALLI	Test_2
<input type="checkbox"/>	American alligator : ALLISON	Alligators
<input type="checkbox"/>	American alligator : AL	Alligators

CONFIGURATION

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

The screenshot shows a web application interface for configuring ambassador animal programs. The main window is titled "Configure Ambassador Animal Programs" and has several tabs: "Handling Groups", "Ambassador List", "Programs", "Option Lists" (which is selected and highlighted with a red box), "System Preferences", and "Snippets". Below the tabs are several dropdown menus: "Select Option List", "Record Options", "Export", and a "Quick Filter" button. A status bar indicates "Now viewing the Handler Status options list. Hide Inactive • Customize Columns • 5 records".

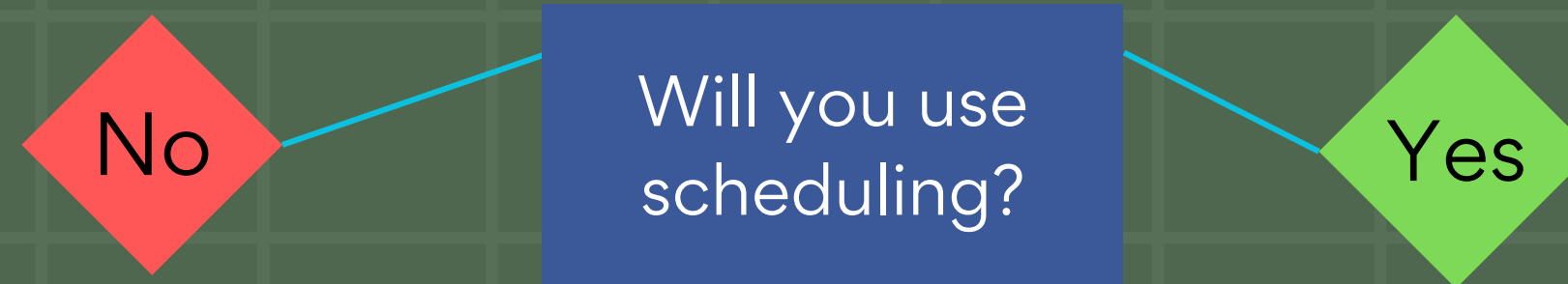
Option Item	Comments	Status	Community Option Name
Trained			
Refresher Needed			
Mentor			
Currently being trained			
Approved to be trained			

An "Edit Handler Status" dialog box is open over the "Refresher Needed" row. It contains the following fields and options:

- Status Name: Refresher Needed (indicated by a red arrow)
- Abbreviation: R (indicated by a red arrow)
- Handling Allowed: animals are available for check out to handler on kiosk
- Users with this status are allowed to handle animals.
- Active Code: Handler Status is Active (available for selection)
- Comments: (empty text area)

At the bottom right of the dialog box are "Save" and "Cancel" buttons.

PLANNING



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.

PLANNING

Will you use scheduling?

No

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

- If you would like to limit animals to specific programs your next step is to configure request groups.

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs **Option Lists** System Preferences Snippets

Select Option List Record Options Export Quick Filter

Now viewing the **Ambassador Request Group** options list. [Hide Inactive](#) • [Customize Columns](#) • 57 records

Option Item	Comments	Status	Community Option Name
09B1A		Inactive	
A Mongoose Group	Must be 3rd year volunteers to request.	Active	
A09028			
A09038			
Africa	Animals from Afri		
Amphibians			
Aquatic			
Arctic	Cold adaptation		
Arizona	Hot adaptations		
Bats			
Beetles			
Bighorn			
Bird			
Blue	Must have 1 yea		

Edit "Ambassador Request Group" Item

Description

A Mongoose Group

Active Option

Option Item is Active (available for selection)

Comments

Must be 3rd year volunteers to request.

Save Cancel

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

- If you would like to limit animals to specific programs your next step is to configure request groups.

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

Configure Ambassador Animal Programs

Handling Groups **Ambassador List** Programs Option Lists System Preferences Snippets

Saved Filters Record Options Export Quick Filter

All Handling Groups [Refine Filter](#) • [Customize Columns](#) • [Save Filter](#) • 118 records

Batch Select	Animal Species Name	Handling Groups	Accession Number	Request Groups
<input type="checkbox"/>	Zapata sparrow : A07056	Colorado animals, Colorado animals advanced	A07056	Bird, Colorado
<input checked="" type="checkbox"/>	Wolf/coyote/jackal/dog : A22-002-	Colorado animals	020	Colorado
<input type="checkbox"/>	Whitespotted bamboo shark : IAWS	Small Sharks Group	TEST06	Small Sharks Group
<input type="checkbox"/>	Wasp : A20052			
<input type="checkbox"/>	STRIPED MOUN			Arctic, Bird, Fowl
<input type="checkbox"/>	Star-eyed hermi			Aquatic
<input type="checkbox"/>	Sparrow : 09B1A			09B1A
<input type="checkbox"/>	Southern sea ot			Western States
<input type="checkbox"/>	Slider turtle : 01-			Reptiles, River Scout, Slider T
<input type="checkbox"/>	SLENDER MONC			A Mongoose Group, Africa
<input type="checkbox"/>	SEA CUCUMBER			Aquatic
<input type="checkbox"/>	Scrub robin : M			Bats, Bird
<input type="checkbox"/>	Scrub robin : DC			Bird, Fowl, Green Group
<input type="checkbox"/>	Scrub robin : A1			Bats, Bird
<input type="checkbox"/>	Scrub robin : A1			Africa, Bats, Beetles
<input type="checkbox"/>	Scrub robin : A0			A09038
<input type="checkbox"/>	Scrub robin : 555			Fowl, Green G
<input type="checkbox"/>	Royal/ball pythor			Snakes
<input type="checkbox"/>	RED-TAILED HAW			Arctic
<input type="checkbox"/>	RED-TAILED HAW			
<input type="checkbox"/>	PURPLE TANG : 050200	Zebrac	050200	Zebrac

Edit Ambassador Animal

Request Groups Handling Groups

Request Groups for 020

- ✖ Colorado

Add a Request Group

- A Mongoose Group
- A Mongoose Group
- Africa
- Amphibians
- Aquatic
- Arctic
- Arizona
- Bats
- Beetles

- 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.

Configure Inventory Section

Option Lists System Preferences

Select Option List Record Options Export am

Inventory options list. [Show Inactive](#) • [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 Option Lists **System Preferences** 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) and choose the Entity Task Category on the Option Lists tab.

Education Program, Training

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.

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 Configure Inventory Section module (go to Configuration | Inventory | Inventory Section) and 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 Configure Inventory Section module (go to Configuration | Inventory | Inventory Section) and choose the Entity Task Category on the Option Lists tab.

Education Program

Task category used for unscheduled animal checkout

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) and choose the Entity Task Category on the Option Lists tab.

Checkout App: Reason for use task categories available when checking out

- Action Plan
- Ambassador Rest/Recovery
- Animal Training Session
- Education Program
- Fecal Submission
- Feeding
- Husbandry
- Lab
- Maintenance
- Maintenance - Animal Welfare
- Maintenance - Change UV Bulbs

- If you would like to include a note at check in or check out with prompts you should configure snippets.

- You can create prompts for check out notes and check in notes

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs Option Lists System Preferences **Snippets**

Select Snippet Type ▼ Select Site ▼

Snippet List for Check Out at Loose Chicken Petting Zoo

Name /	Text
weather	Today's weather is:
Problem	Missing a collar or tag.
Gotcha	Taking this one.
Equipment	Indicate whether you took any special equipment for
Capture	This one is a little hard to catch.

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs Option Lists System Preferences **Snippets**

Select Snippet Type ▼ Select Site ▼

Snippet List for Check 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 handling.
Attendance	There were participants in attendance.
alarm	Describe out of ordinary conditions or behavior:
Aggression	Animal showed aggressive behavior today

- see also system preference to turn on/off notes during check out.

PLANNING

Will you use scheduling?

Yes

- **First, configure request groups.**
- **Do you want to include a reason for check out*? Then you will configure Task categories.**
- **Configure Program Areas**
- **Optional* configure Programs, Events, and Themes.**
- **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"**

- If you would like to limit animals to specific programs your next step is to configure request groups.

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs **Option Lists** System Preferences Snippets

Select Option List Record Options Export Quick Filter

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Arizona	Hot adaptations		
Bats			
Beetles			
Bighorn			
Bird			
Blue	Must have 1 yea		

Edit "Ambassador Request Group" Item

Description
A Mongoose Group

Active Option
 Option Item is Active (available for selection)

Comments
Must be 3rd year volunteers to request.

Save Cancel

- 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.

Configure Inventory Section

Option Lists System Preferences

Select Option List Record Options Export am

Inventory options list. [Show Inactive](#) • [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.

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs Option Lists **System Preferences** 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

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- Education Program
- Fecal Submission
- Feeding
- Husbandry
- Lab
- Maintenance
- Maintenance - Animal Welfare
- Maintenance - Change UV Bulbs



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

Program Event: Configure in Option list, Optional to include.

Program Theme: Configure in Option list, Optional to include.

Programs: 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 include a note at check in or check out with prompts you should configure snippets.

- You can create prompts for check out notes and check in notes

Configure Ambassador Animal Programs

Handling Groups Ambassador List Programs Option Lists System Preferences **Snippets**

Select Snippet Type Select Site

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Name /	Text
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Length	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

- see also system preference to turn on/off notes during check out.

FINAL CONSIDERATIONS

system preferences:
viewing options

system preferences:
Task Category settings

system preferences:
Check out app:
checklist

Set up Blocking Tasks
and/or Rest periods

system preferences:
Handler preferences

Determine user
training needs



POSSIBLE TRAININGS

- 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)

QUESTIONS & RESOURCES

www.trackscommunity.com

support@tracksoftware.com