AMBASSADOR ANIMALS SET-UP

Tracks Software

GETTING STARTED

Tracks **Ambassador Animal Module**
GETTING STARTED

Collection Planning: Ambassador Animal Programs

Will you use scheduling*?

No

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.

would you like to limit animals to specific programs?

Yes

CF> Request Groups

Assign Animals to Request Groups

No

would you like to include a reason for use at checkout?

Yes

CF> Task Categories (CF Inventory)

Go back to Program Area if scheduling.

No

CF> System preferences & Snippets.

Congratulations! You are ready to use the Check out App to check animals out on-demand.

Yes

CF> Option List Program Area

optional CF> Option Lists Event & Theme

CF> Programs

Continue to CF> System preferences & Snippets.

Congratulations! You are ready to use the Program Request wizard or website to begin scheduling animals &/or the checkout App.

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.

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CONFIGURATION

CF>
Handling Groups

Add Animals to appropriate group(s)

CF> Option List: Handler Status

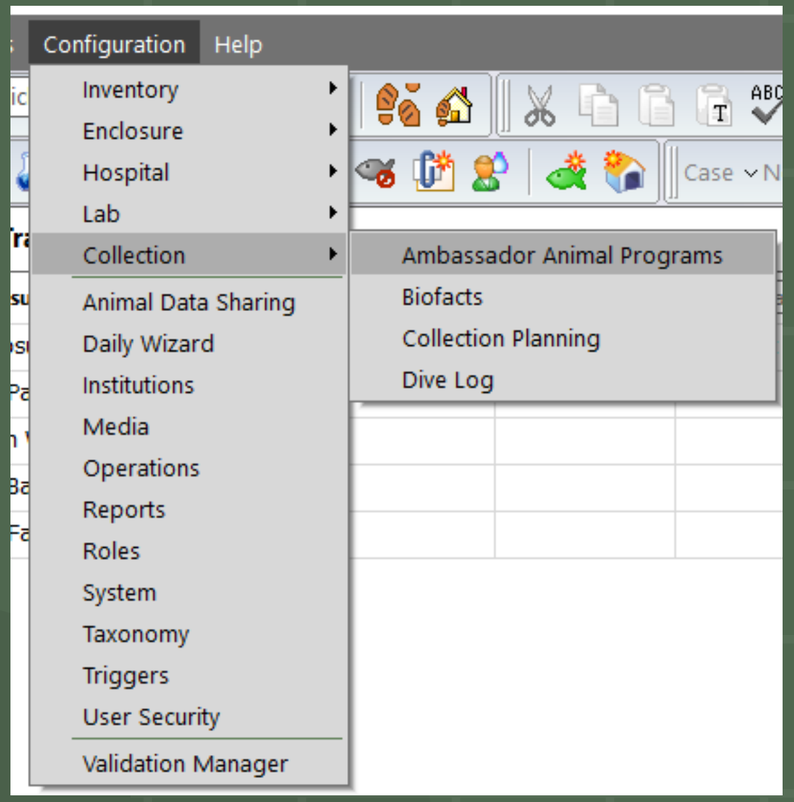
Animal
Handlers Module: Assign Users to handling group(s) based on training level.

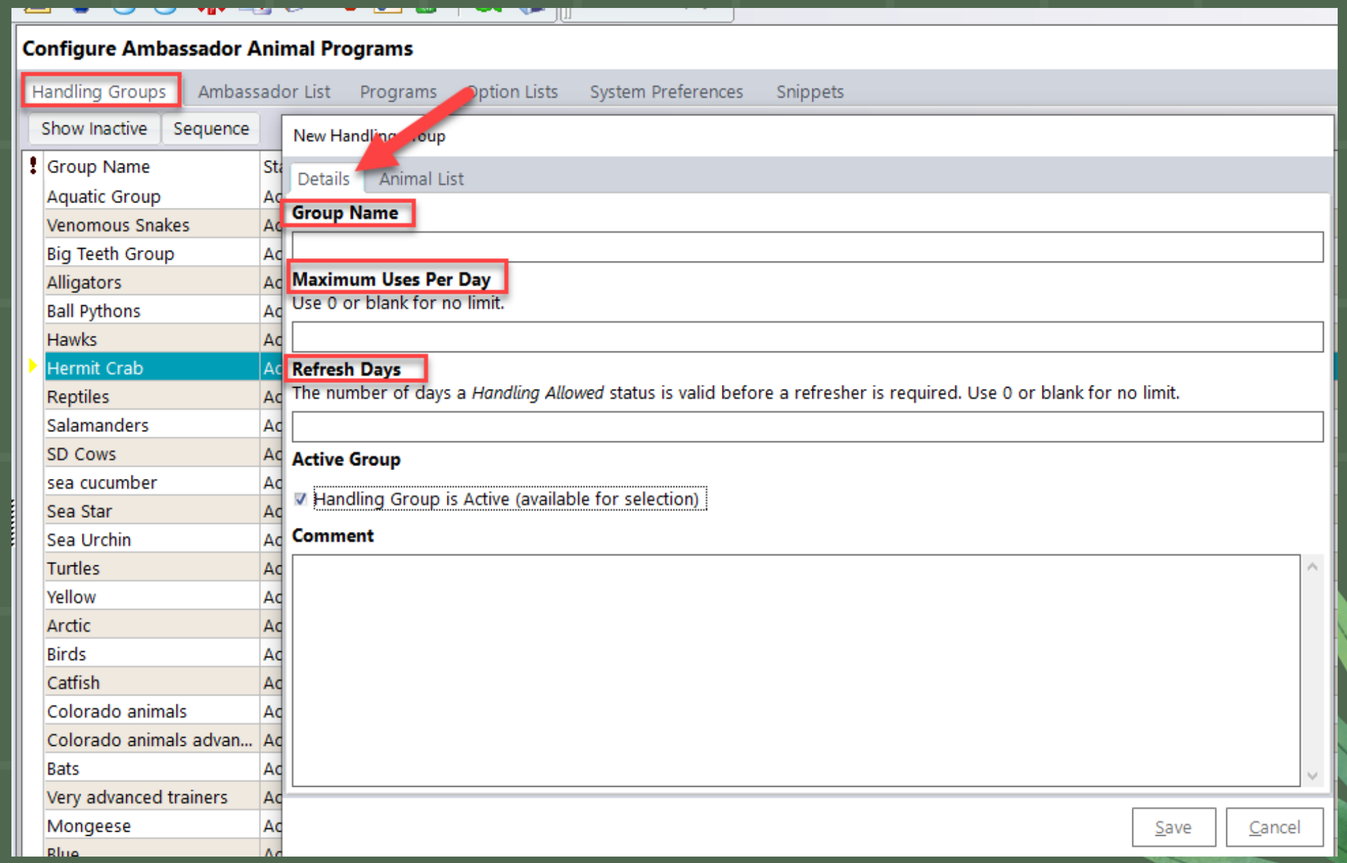
1. Configure Handling Groups
2. Add animals to Handling Groups
3. Configure Handler Status
4. Assign users to handling groups with correct status

CONFIGURATION

Handling groups limit access when checking out animals.

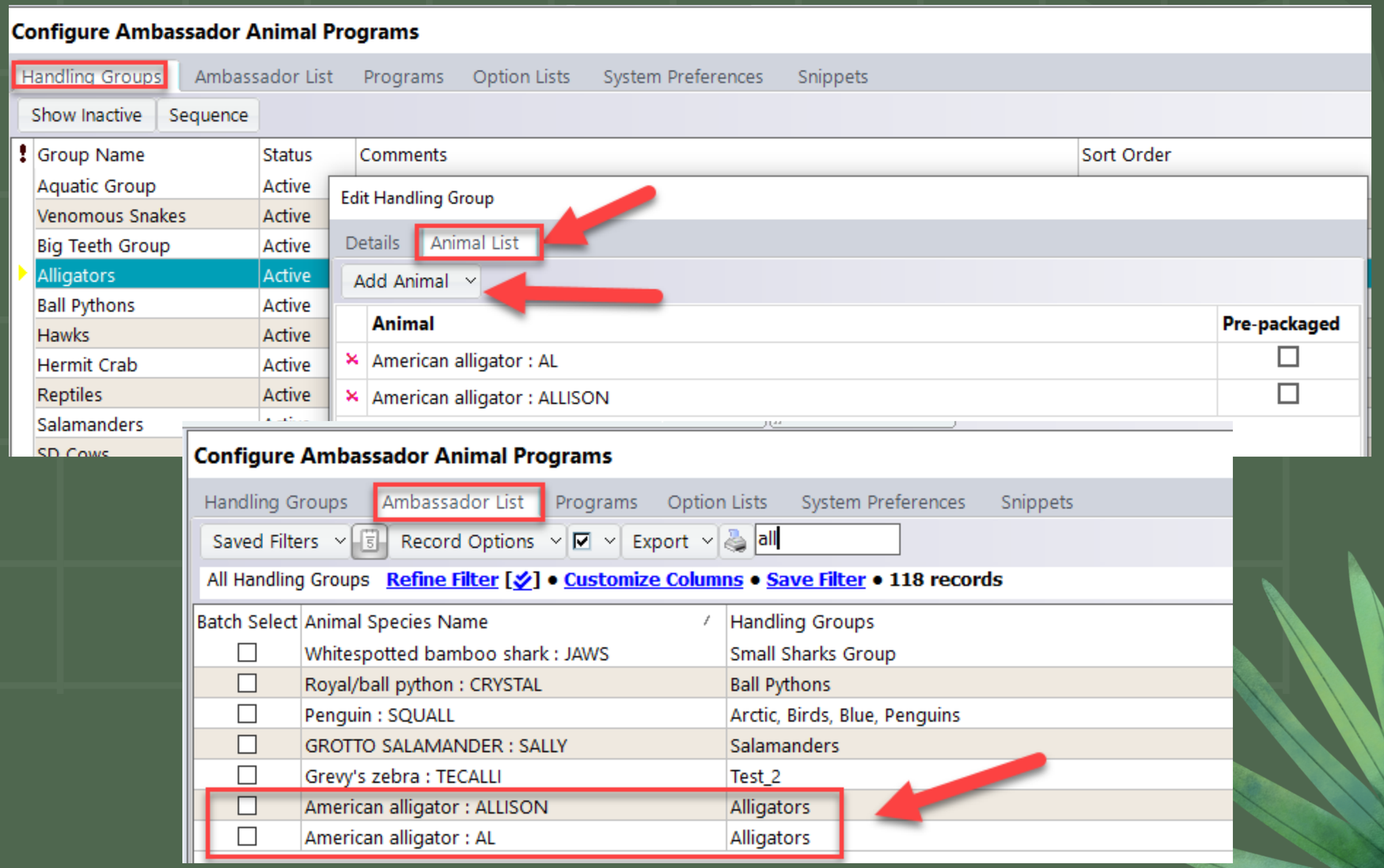
You can group by level of training needed, taxonomy, or program type.





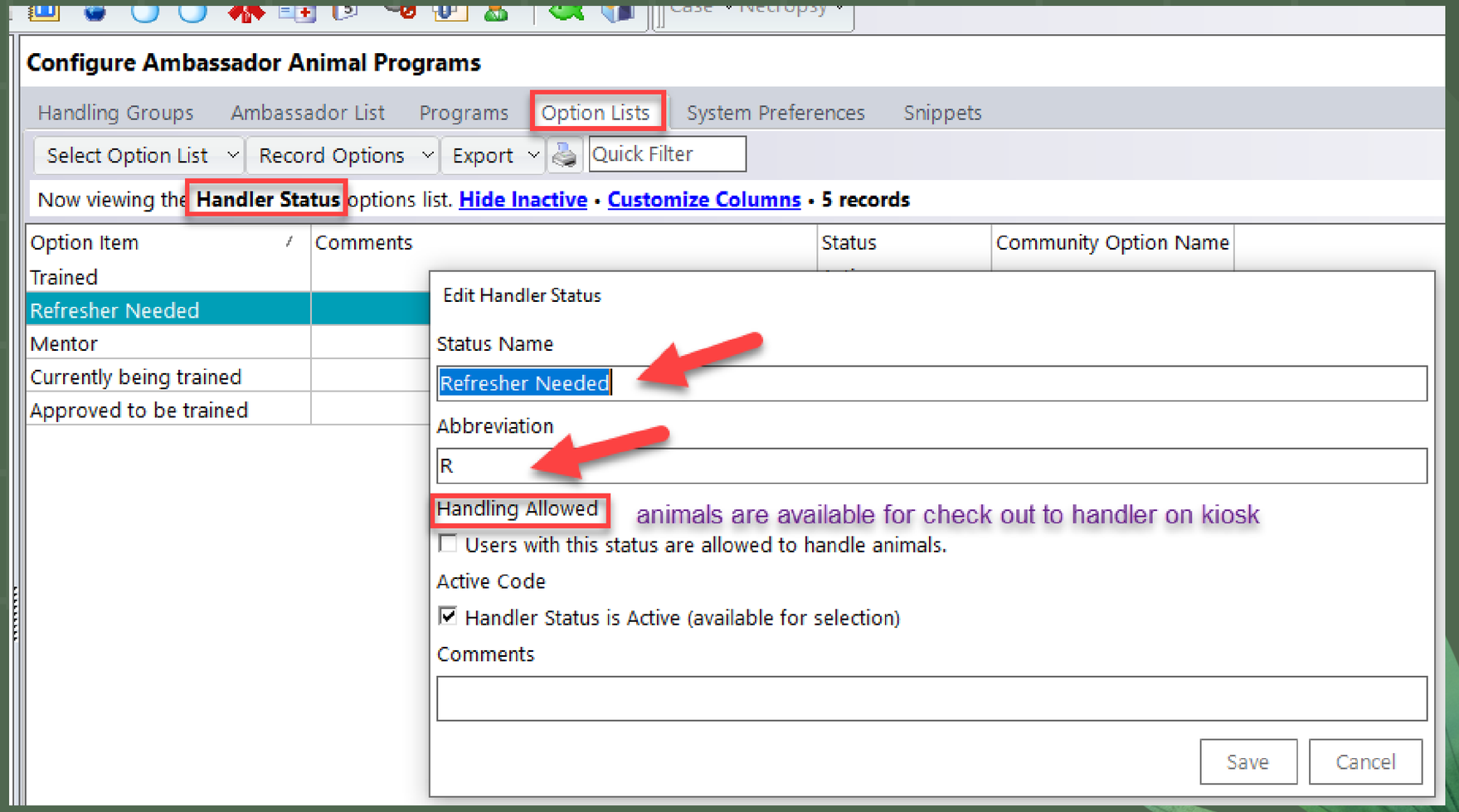
CONFIGURATION

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



CONFIGURATION

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



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.

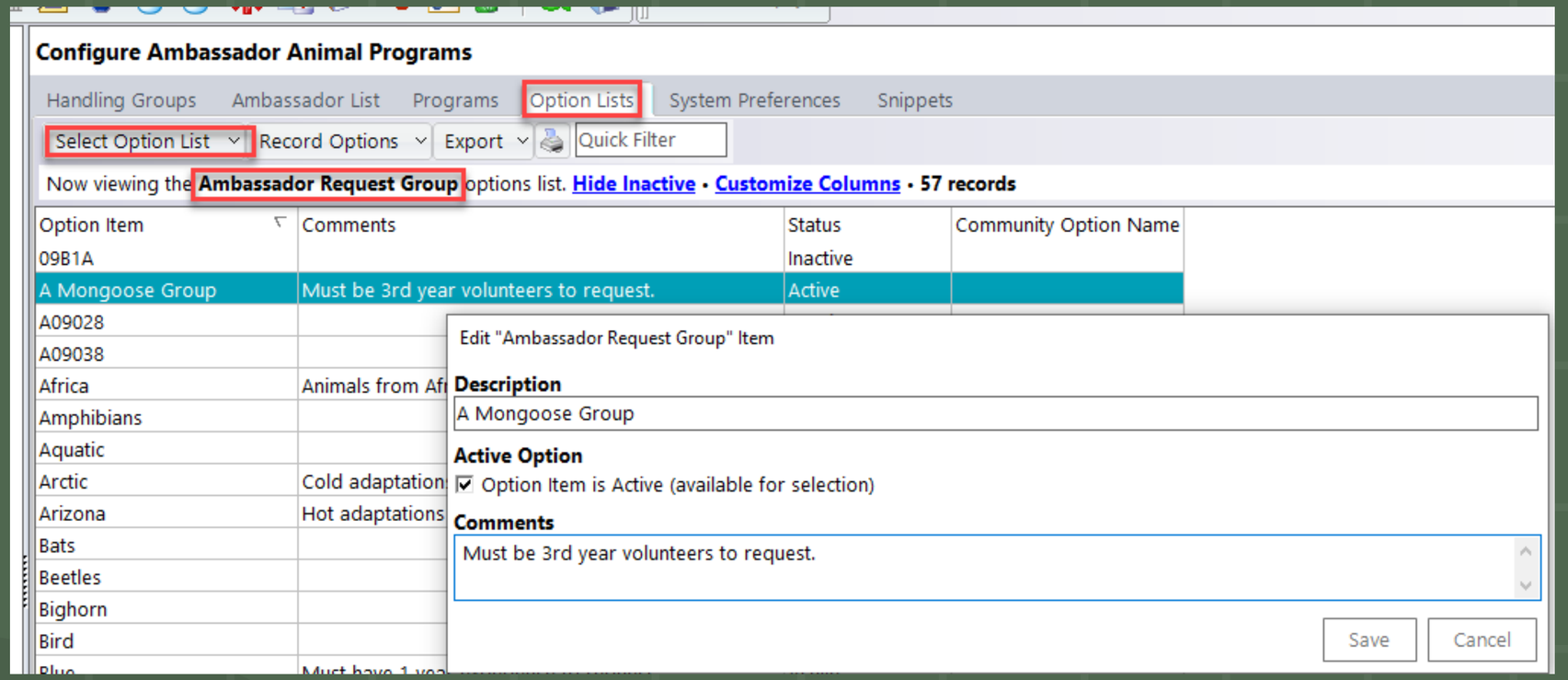
PLANNING

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.

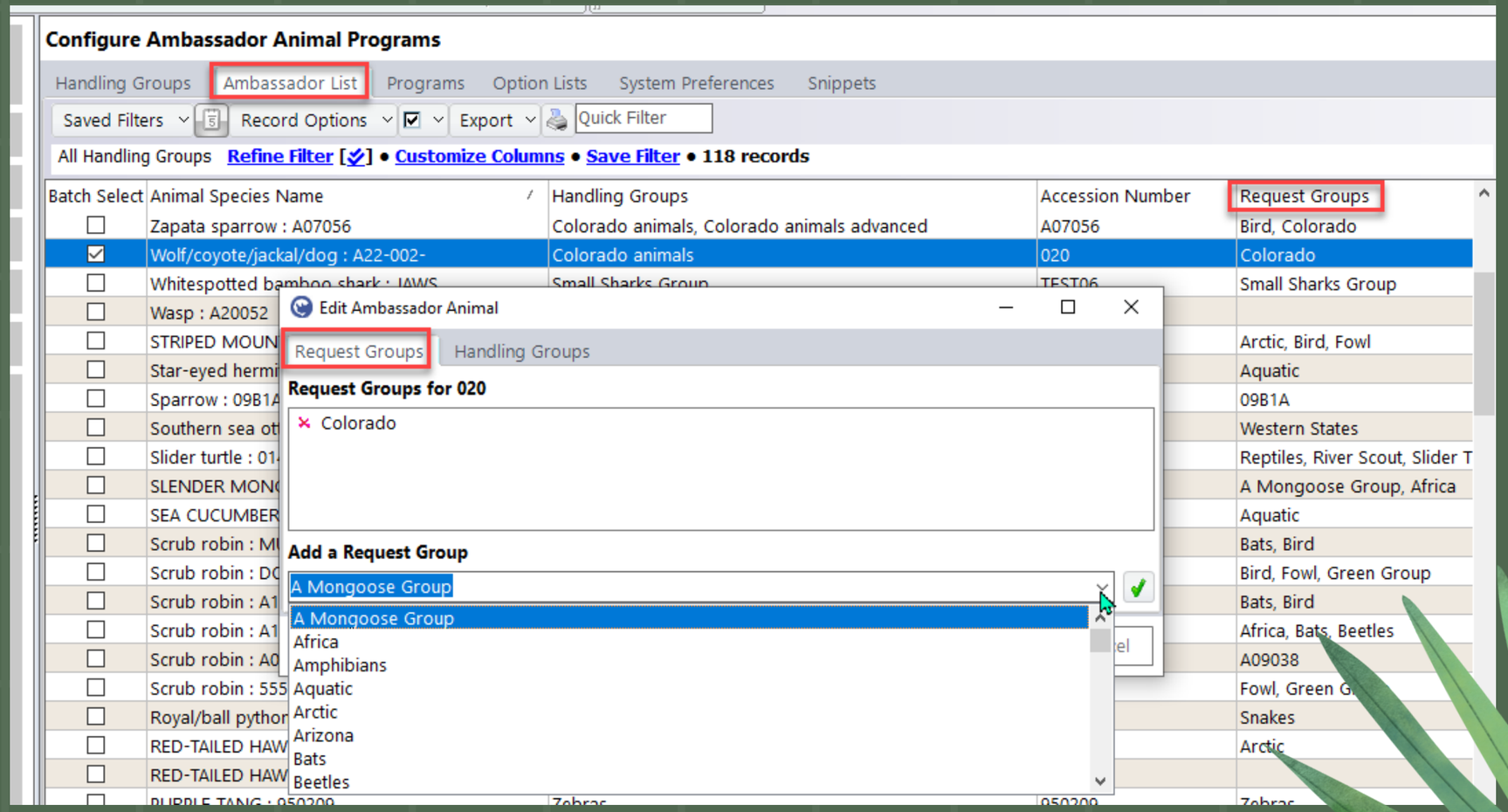
- If you would like to limit animals to specific programs your next step is to configure request groups.



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

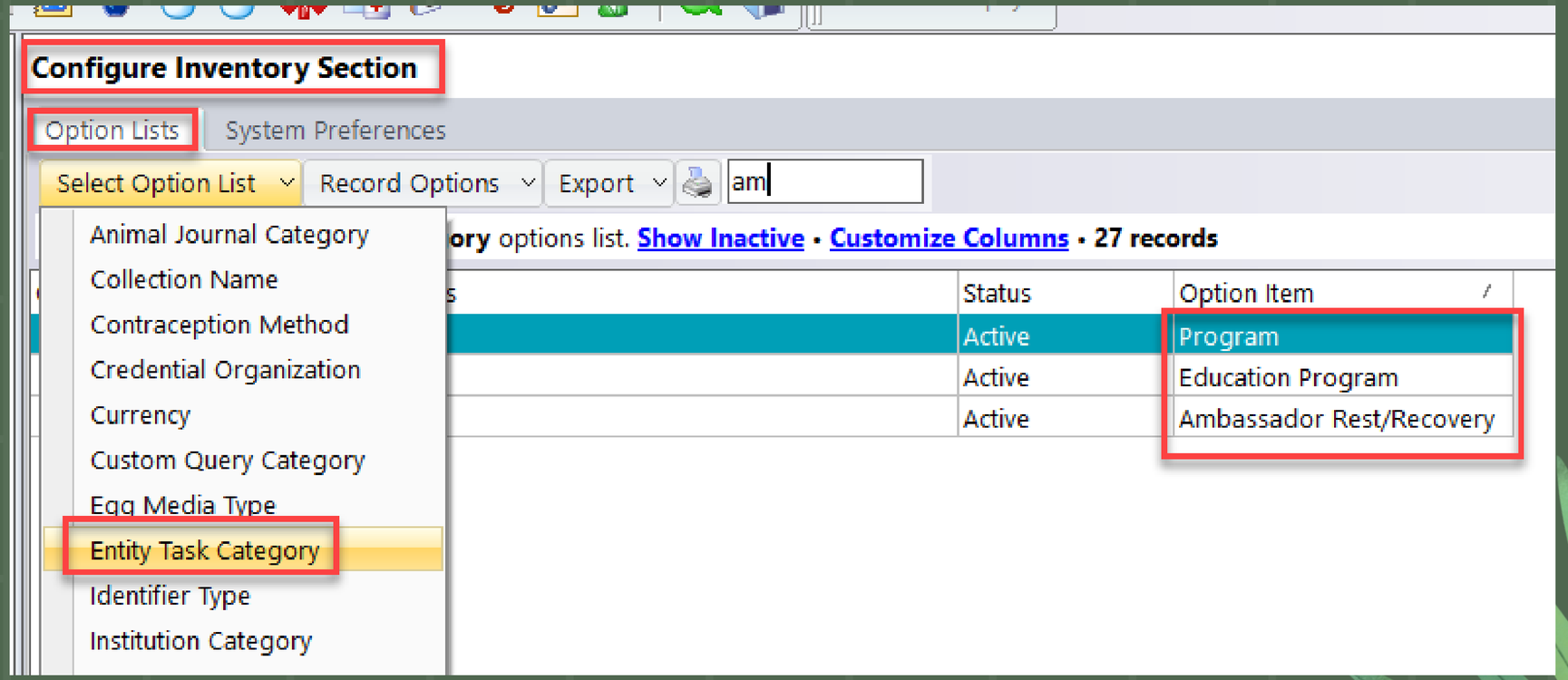
- If you would like to limit animals to specific programs your next step is to configure request groups.

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

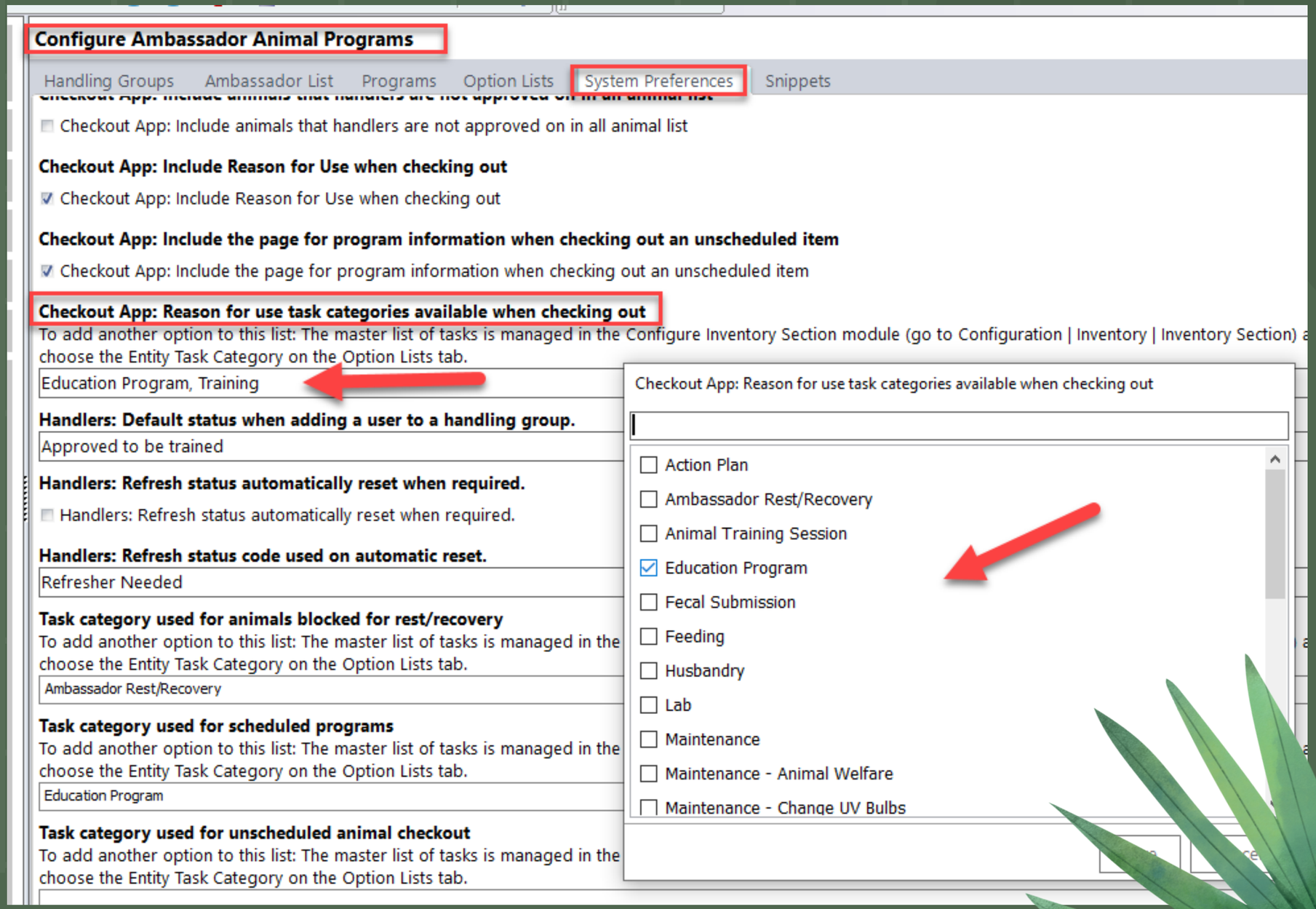


- If not, do you want to include a reason for check out? Then you will configure Task categories.

- Task categories are configured in the Configure Inventory Section.

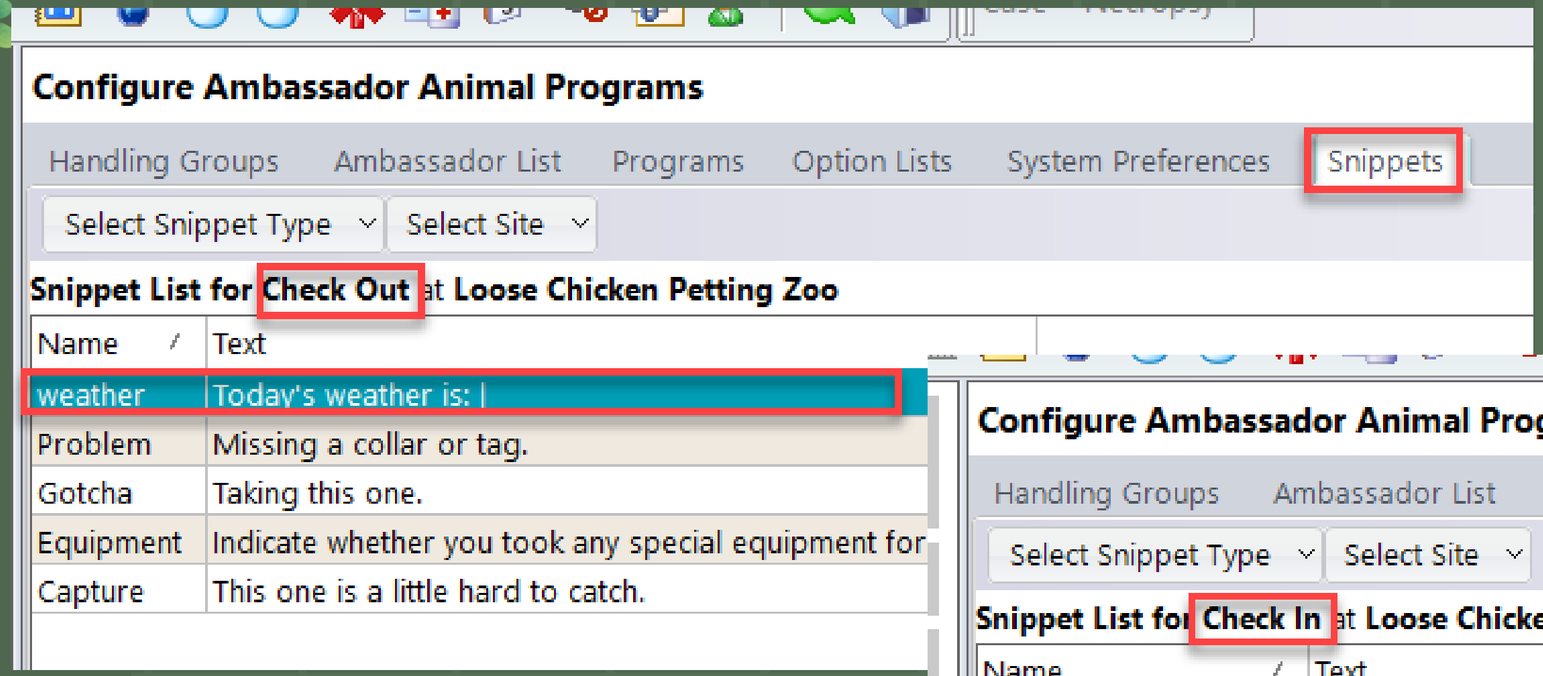


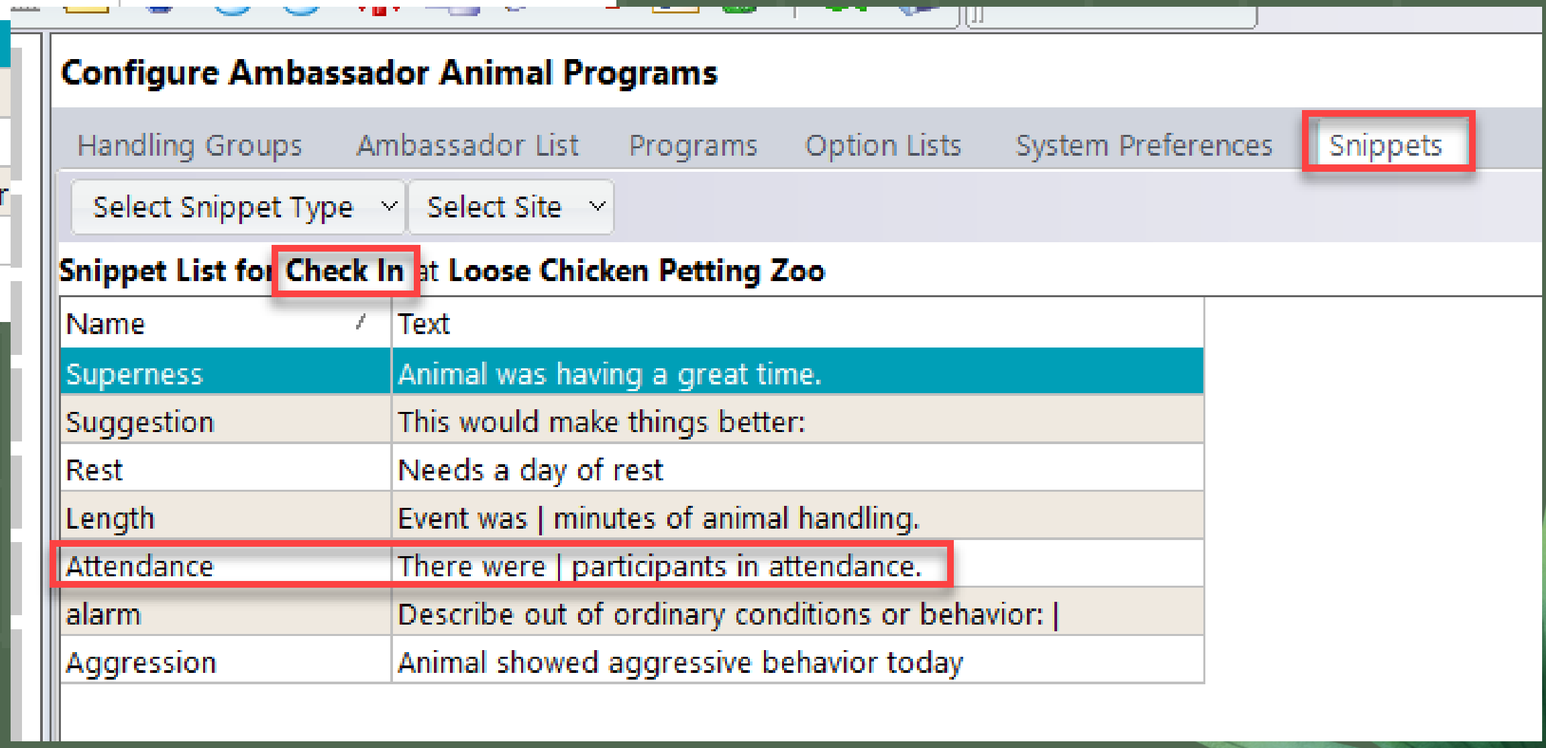
- Back in Configure Amb. Animals go to System preferences and set the reasons for check out.



- 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





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

PLANNING

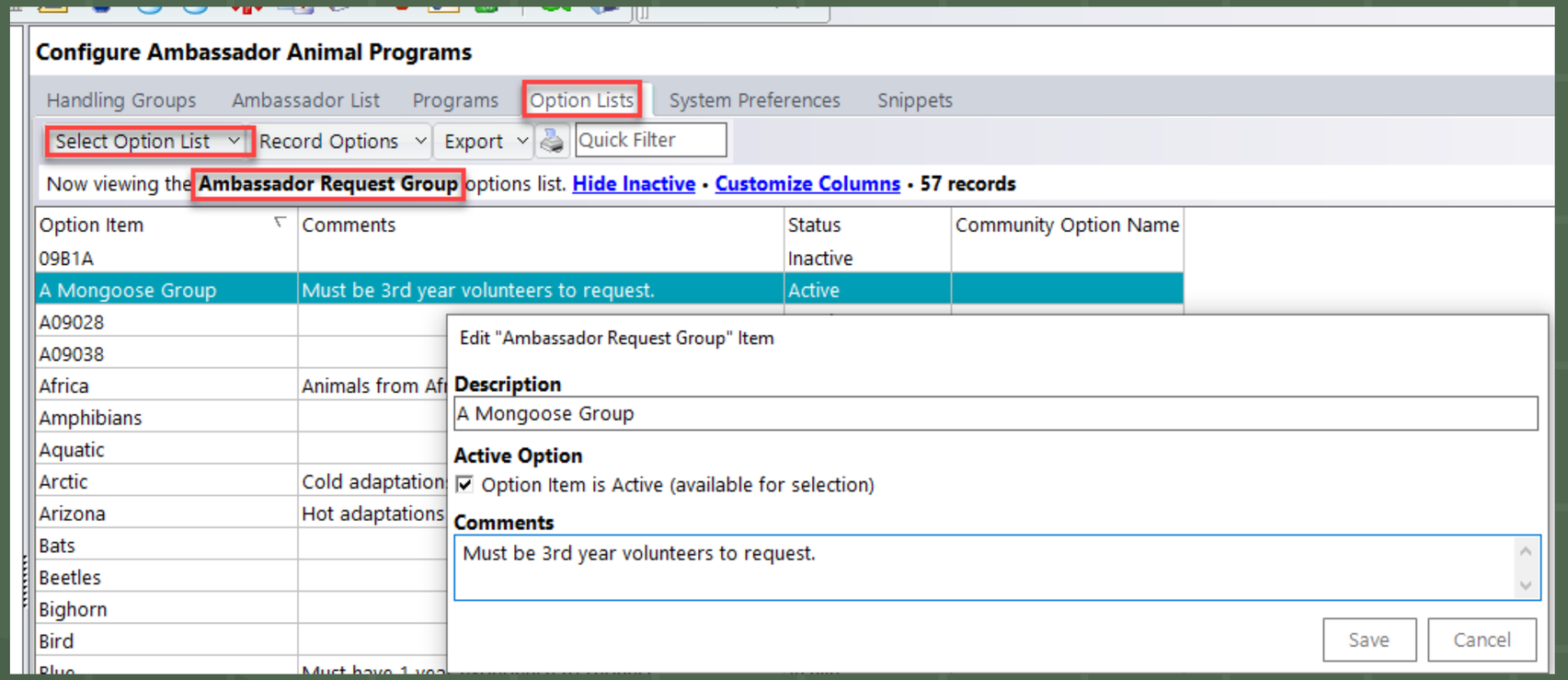
Will you use scheduling?

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"

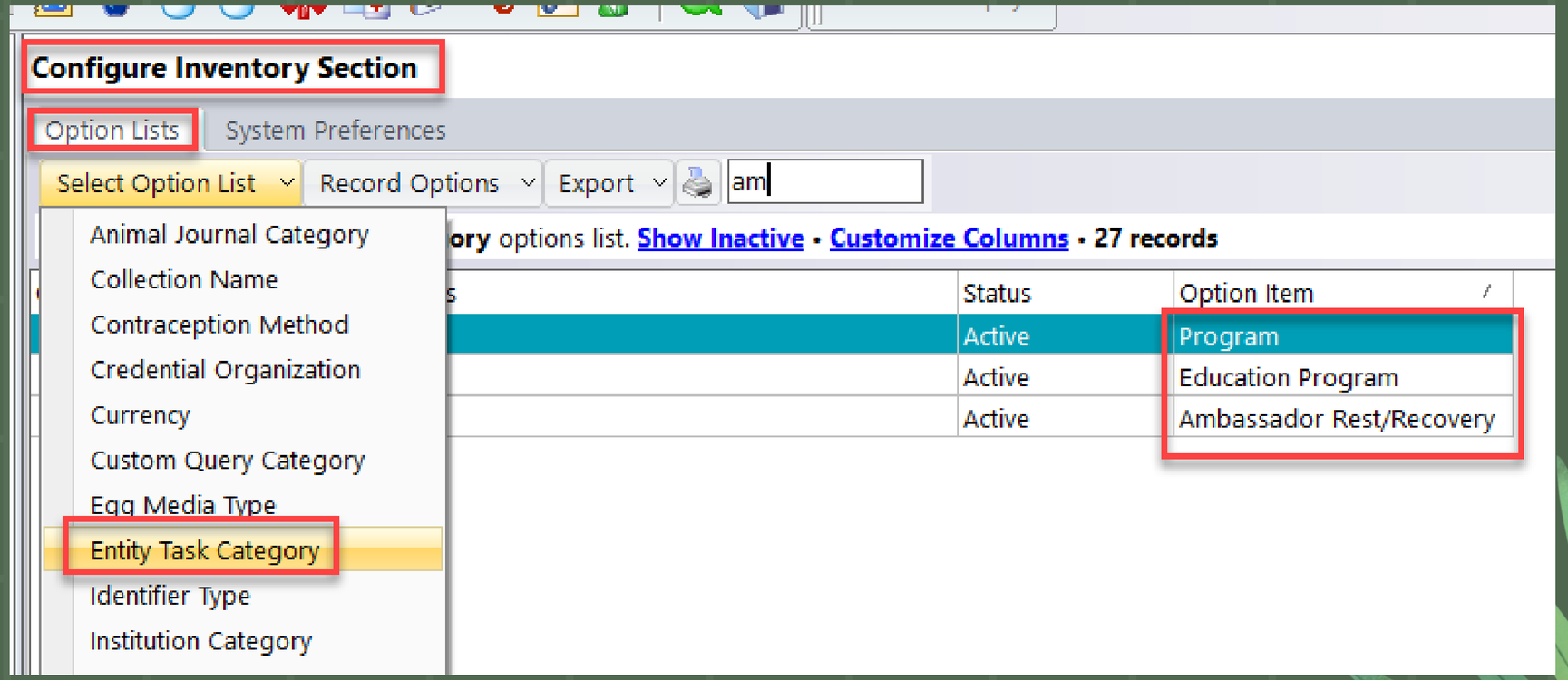
- If you would like to limit animals to specific programs your next step is to configure request groups.



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

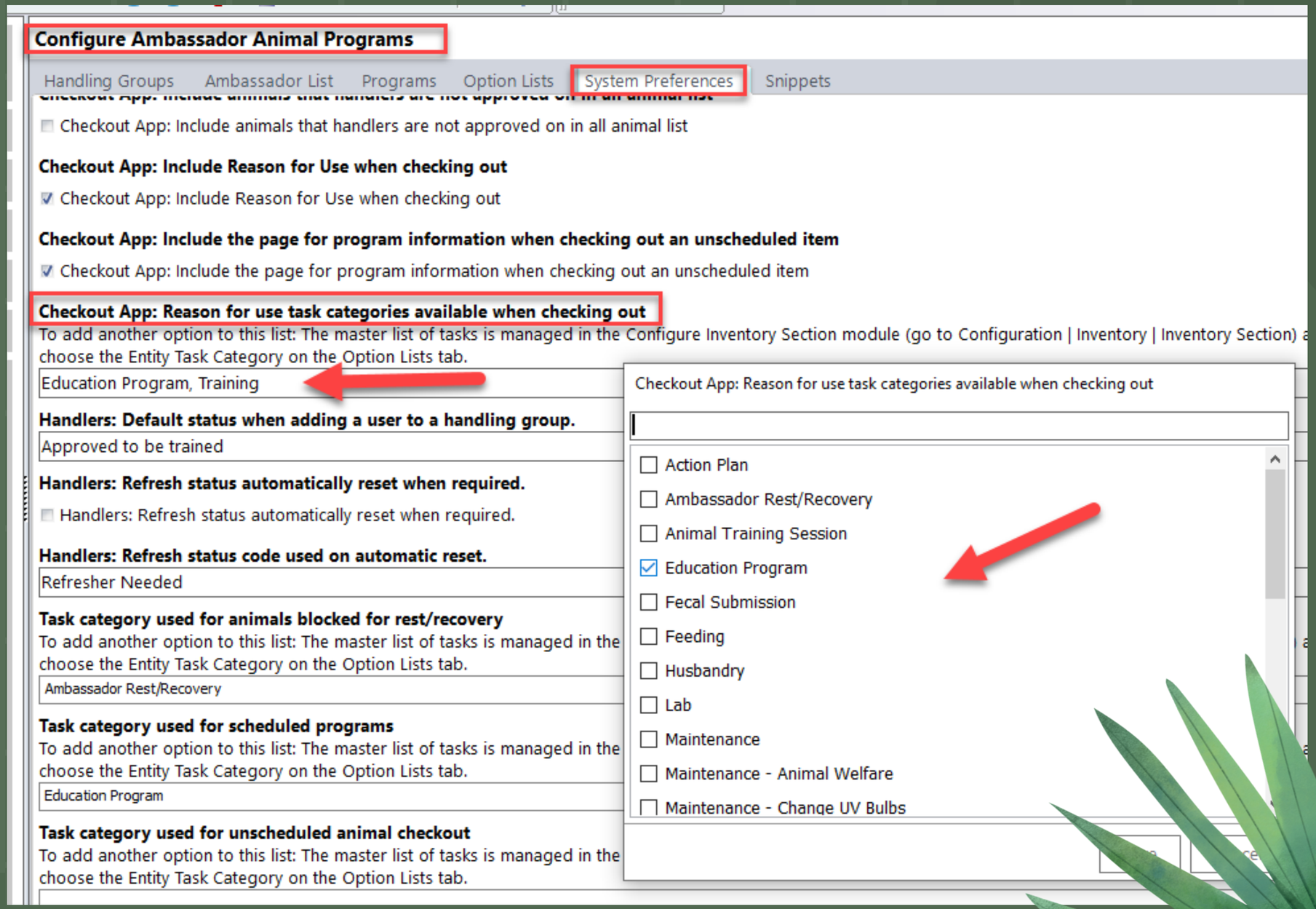
- If not, do you want to include a reason for check out? Then you will configure Task categories.

- Task categories are configured in the Configure Inventory Section.



- 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.



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

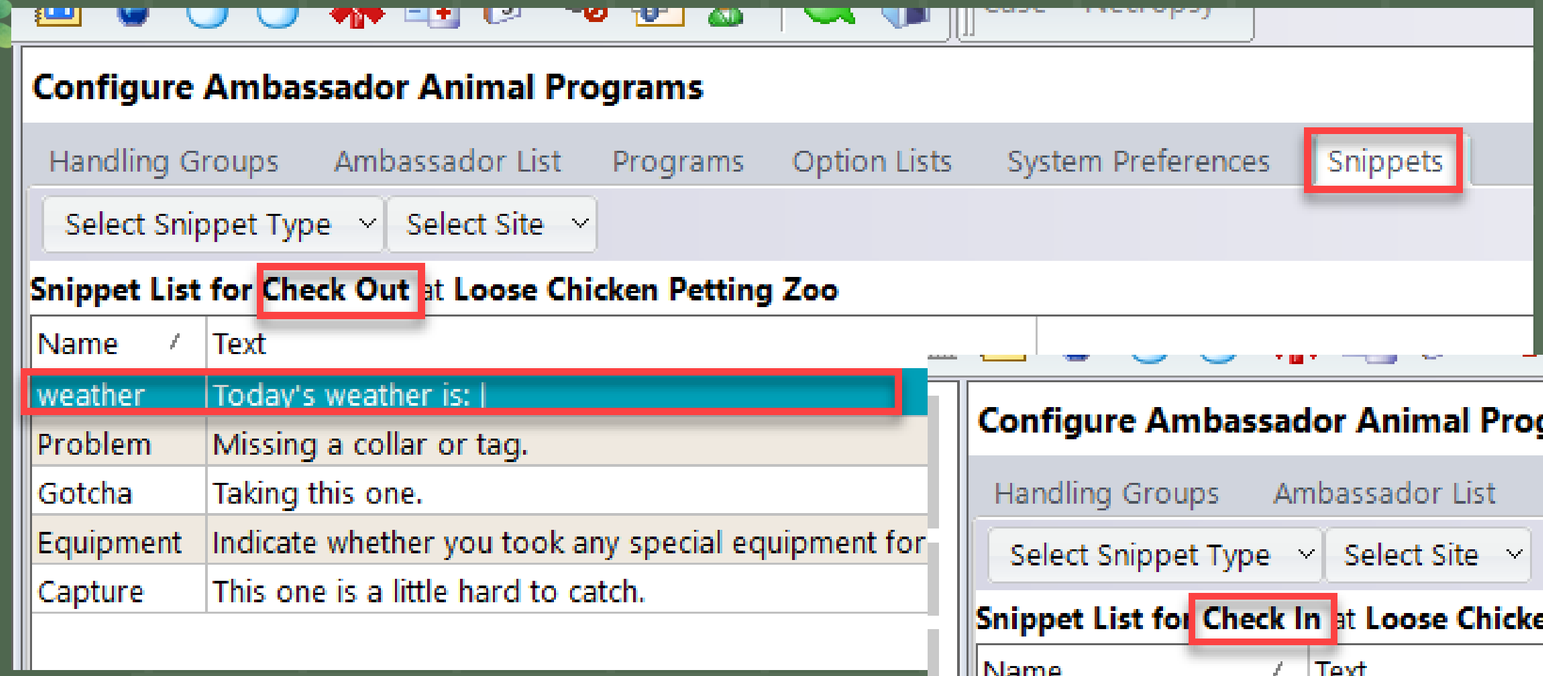
Program Event: Configure in Option list, Optional to include.

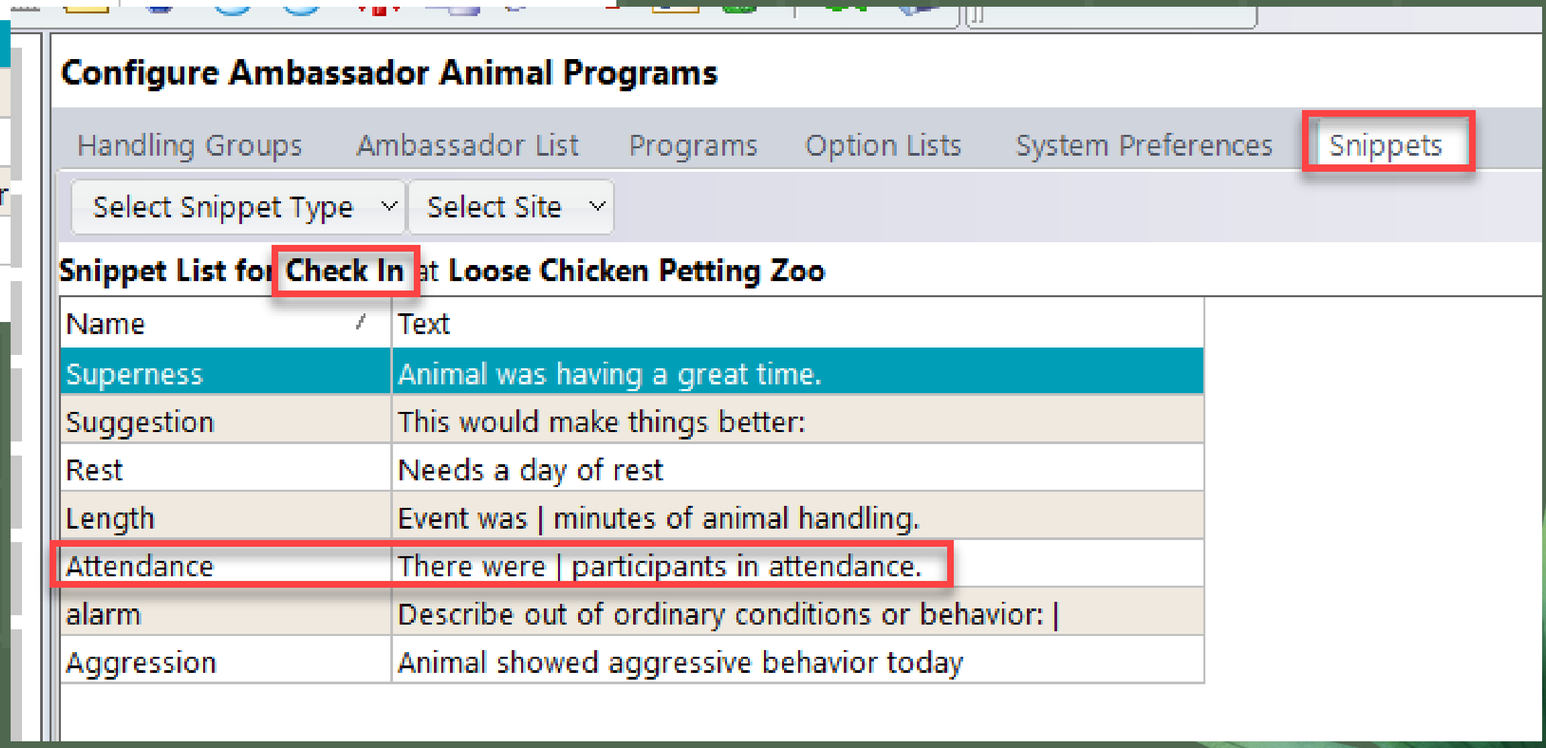
Program Theme: Configure in Option list, Optional to include.

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





- 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@trackssoftware.com