

ZOO AND AQUARIUM ASSOCIATION

Collection Planning Online System (CPOS)

User Guide

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What do you want to do?

→ I'm a new member and need to add records to my collection

First review CPOS program layout, page 3

Go to page 4 to learn how to add (+) animals to your collection

→ I need to edit my collection

Go to page 4

→ I want to view records of other organisations

Go to page 8

→ I would like to run a report

Go to page 13

Access and Layout

Login steps

These are the steps to login and explained in more detail afterwards.

1. Enter username and **password**.
2. On landing page, select criteria (optional) and/or species in “Quick Search” (optional).
3. Hit **Submit**.
4. You will now arrive in the CPOS workspace.

Logins



There are two permission logins available to organisations:

1. **Editing your collection** - these login details is provided to the record officer or the person responsible updating census data in your organisation.
2. **View regional collection data** of all member organisations and download data. This login is available to all members' employees. Access will not be given to edit your collection.

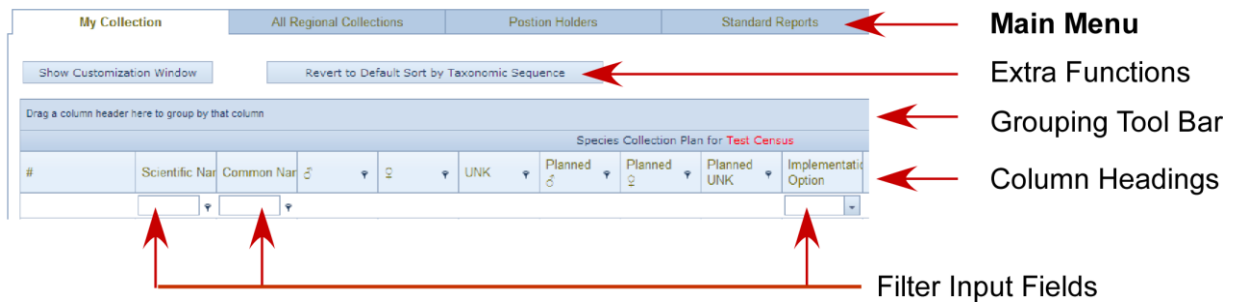
Layout

Landing Page

Each area (**My Collection** and **All Regional Collections**) is preceded by a landing page where you have the option of selecting types of information for inclusion in the data table. Note that some boxes have been pre-selected.

After arriving to the data grid you will be able change your selection data by using the **Customisation Window Tool** to show or hide columns.

Top Navigation



Main Menu

My Collection - displays information on your organisations collection of animals. By default species are sorted by taxonomic sequence. *This page is only available when logging in with editing access.*









All Regional Collections - displays collection information from all Association members within the region. By default species are grouped by scientific name.

Position Holders - view current species coordinators, etc.


Standard Reports - download standardised reports regarding your organisations collection. (Visit the Reports section for more information.)

Editing Your Collection

These **Icon buttons** are displayed in the left column.

ICON KEY	
	Add new species to My Collection. This icon appears on every row and it doesn't matter on which row you click to add a new species to your collection.
	Delete species from collection.
	Save changes after editing a record.
	Cancel any changes to a record.
	View collections with other organisations.
	This icon appears when a filter is applied. Click it to clear all filters .
	Hover over this icon to view TAG (Taxon Advisory Notes) notes or click on this icon to display the TAG note column.
	Indicates Institutional notes on the collection record.

Adding a new record to your collection

1. Click on  and blank row will appear.
2. Start typing either the **common or scientific name** you wish to add. You will need to type at least 3 characters into the Taxon List field.
3. A selection window will appear based on the characters you type. Select the desired species by clicking on name.
4. Add the current and planned numbers to the corresponding fields:
 - a. ♂ - current males
 - b. ♀ - current females
 - c. UNK – current unsexed
 - d. Planned ♂ (males)
 - e. Planned ♀ (females)
 - f. Planned UNK (unsexed)
5. Select the Implementation Plan from the following fields:
 - a. Implementation Option
 - b. Implementation Category
 - c. Time Frame

What to do if...

The species is not listed in CPOS.



If the species does not appear after typing in the characters, ZAA will need to add this in manually. Email asmp@zooaquarium.org.au with the species name you would like added to the taxon list.

Note: The ZAA annually reviews the options available to best suit the region and membership, keeping in mind that we cannot offer every scenario. Please select the options from the implementation and time frame available that best describe the course of


implementation. Feel free to contact the ZAA office if you would like us to consider edits to the implementation options and time frames.

6. Click on  to **save** record, or  to **cancel** changes.

Editing an existing record


1. **Double-click** on the species name.
2. Proceed across the row to change current and planned numbers. Implementation options and time frames are provided in drop down menus.
3. Click on  to save record, or  to cancel changes.


Deleting a record

1. Locate the record to be deleted.
2. Click on .
3. Click **Confirm**.
4. Record is deleted from your collection


Editing a Collection via Excel

The Export button at the top toolbar is used to view and edit data in Microsoft Excel. Once your data is edited, you can reload it to the data form.

 **It is important to note that new species records cannot be added through Excel.** New records can be added before or after the exporting records (see [Adding a new record to your collection](#)).

New members must first add all species holding by using the add tool () via “My Collection”. Once your collection is complete you can use the export to Excel function to edit your current and planned holdings.

Download your records into Excel

1. Click on the **Export** button at the top of the page.  Note this is different to the “Export to excel” link at the bottom of the page. Only the **Export** button at the top will allow you to edit and import your records back into CPOS.
2. Your internet browser will download the data in an excel document format. Open up the document. Ensure that excel will enable editing in the document.



Layout of the spreadsheet

1. Certain columns and formatting are locked in the spreadsheet to ensure data integrity. The only fields that are editable are columns **D – L** (number of specimens and implementation information). Columns **A – C** are locked.
2. If any **TAG Notes** are existing for a species record these can be made to appear by hovering over the red triangle in column A.

Editing records in the spreadsheet

1. You can change the values of columns **D – I** by using the number keys on your keyboard.
2. The implementation data (columns **J – L**) are cascading drop down fields. Start with column **J** and select the best option that fits the implementation scenario. Continue to column **K**, and then **L**.
3. Note at this time no blank options are available in the dropdown fields but this will be rectified in upgrades planned for 2014.

Upload edited records

1. Once all the data has been edited, click **Save As** and rename the spreadsheet to a name of your choice and to a location on your local computer that is easy to navigate to for the next steps.
2. Go back to CPOS and click on the **Import** button . A new window will appear.
3. Click on the **Choose File** button to find the excel spreadsheet with the edited records. The name of the file should appear below the Choose File button. If you have selected the wrong file, click on the **X** in front of the file name to delete it.
4. Next click on the **Upload Excel Spreadsheet** button
5. A dialogue window will appear saying File has been successfully uploaded. Click **OK**.
6. To finish the import, click on the button **(3) Import Data**
7. CPOS will confirm that the data has been updated. Click **OK**.
8. Now that you're finished with the uploading you can close the select excel spreadsheet window.
9. Go back to the CPOS page and click on the **Refresh** button  to view the latest changes.

Viewing All Collections

To view all member collections, select **All Regional Collections** in the top menu.

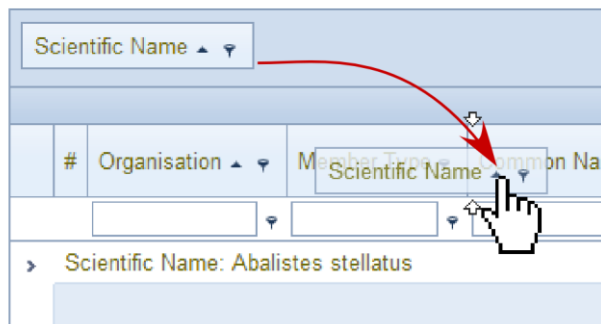
The workspace is set up to have organisations grouped under species (scientific name). The organisation name is not automatically displayed. There are two options to view organisations:

1. Click on the **arrow** next to the left of the scientific name

The screenshot shows a table with columns: #, Organisation, Member Type, and Common Name. A dropdown menu is open for the 'Scientific Name' column, showing 'Scientific Name: Abalistes stellatus' with a red box around the dropdown arrow. Below this, two rows are visible: one for 'Sea World' and one for 'UnderWater World', both with 'Member - Full Institution' and 'Starry Triggerfish' as the common name.

#	Organisation	Member Type	Common Name
Scientific Name: Abalistes stellatus			
	Sea World	Member - Full Institution	Starry Triggerfish
	UnderWater World	Member - Full Institution	Starry Triggerfish
Scientific Name: Abudehduf bengalensis			

2. Move the **Scientific Name** column header back to column bar (see [Grouping Tool Bar](#)).



The result will appear similar to this:

#	Organisation	Member Type	Scientific Name	Common Name	♂
	Sea World	Member - Full Institution	Abalistes stellatus	Starry Triggerfish	0
	UnderWater World	Member - Full Institution	Abalistes stellatus	Starry Triggerfish	0
	Sea World	Member - Full Institution	Abudehduf bengalensis	Bengal Sergeant	0
	Sea World	Member - Full Institution	Abudehduf sexfasciatus	Scissortail Sergeant	0


Customising Data and Workspace

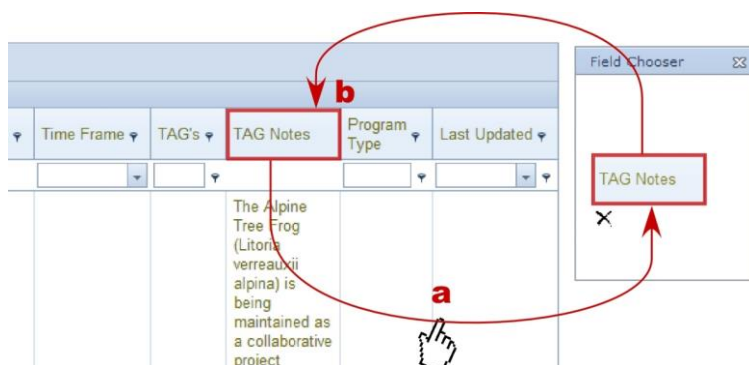
Columns

Hiding or revealing columns

Whether you are editing your collection or viewing collections from all member organisations, you can customise the data grid by hiding or revealing columns with the **Customisation Window Tool**.

To **activate** the Customisation Window:

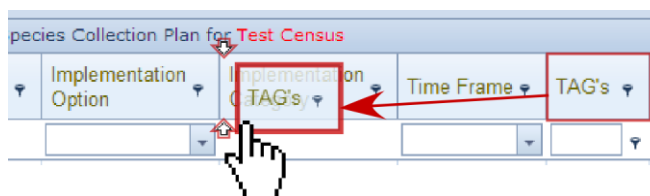
1. Click on  in the upper right corner of the grid.
2. A new window “Field Chooser” will appear and will list all **hidden** columns. You can use your mouse to click and drag **column headers** to and from this window.



- a. Click and drag **column header** to the window. The column will now be hidden from view.
 - b. To add the column back into the table, click on the column name in the Field Chooser window and drag it to the column header area.
3. You can hide the Field Chooser window by clicking the X in the right corner of that window.

Moving columns

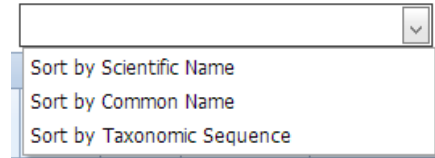
Columns can be moved to customise your workspace. Click and drag the column header to new position.



Sorting

Arrow buttons appear on the column headers that allow you to sort by **ascending** or **descending** order. Click the arrow to alternate between the two sorting orders.


By **default** collection data is sorted by **taxonomic sequence**. After custom sorting and filtering, you can reset the default on the sorting sequencing by clicking the button at the top. (Please note this option only exists when viewing your collection data.)

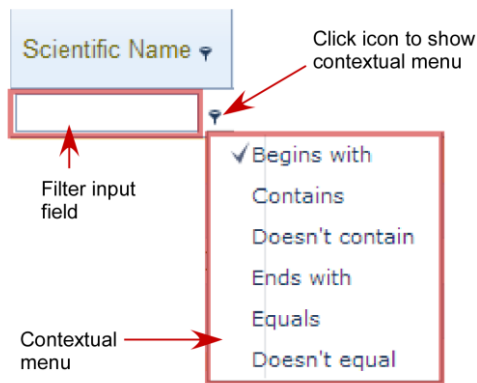
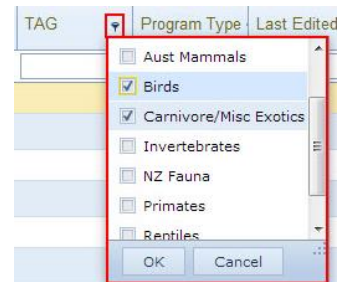


Filtering

Three different filtering methods are explained below.

Filtering icon next column header

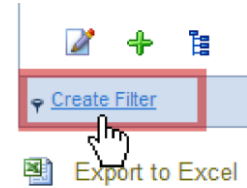
Click on the filter icon  next to the column heading and a new dialog window will appear, which contains a list with distinct column values. Check the items you wish to filter by (multiple items can be checked).



Insert value in input field below the column header Some fields will offer a drop down option while others you will need to type if the value you wish to filter by. Also take note of the **small filter icon** next to some fields. Clicking on this icon will activate a contextual menu, including “**Equal**”, “**Contains**”, “**Greater than**” and “**Less than**” to aid you with your filtering.

Filter Control Tool

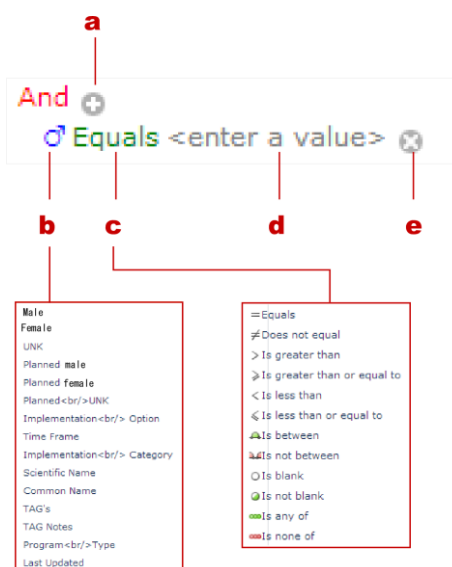
This is an advanced method where you can apply multiple filters to the data set. The Filter Control allows to build a query with Structured Query Language (SQL) statements.



1. Click on **Create Filter** in the bottom left corner of the grid to open pop-up window.
2. A new window **Filter Builder** will appear. Click on the green icon to add a new condition.



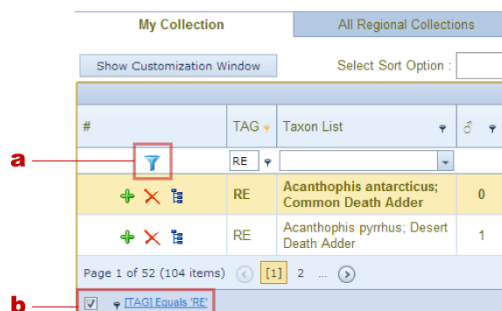
3. A new line will appear where you can build your statement.



- a. Adds new condition
- b. Selects data column
- c. Select SQL conditional statements
- d. Enter value (you must hit **ENTER** after to save value into the query)
- e. Deletes condition

4. After entering your values click on OK and the results will appear in your data table.

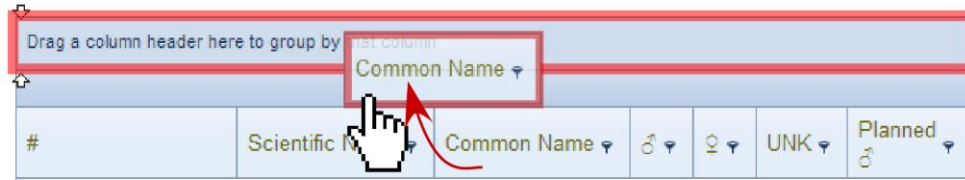
Clearing filters



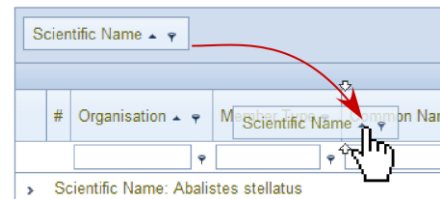
- a. The blue filter icon when present indicates that a filter is applied. **Click on this icon to clear the filter.**
- b. To **temporary disable the filter**, uncheck the box on the bottom left of the data grid. To reapply, check the box.

Grouping Tool Bar

Data can be grouped by dragging the column header to the bar located at the top of data table. This may be useful if you want to group species in your collection by specific parameters such as Taxon Advisory Groups (TAG) or Program Type or Institution.



To **ungroup** the data, drag the column from the bar back to the column header area. (Note that the specimen numbers cannot be grouped.)



Reports

Custom Reports


You can export records from each collection workspace:


My Collection:

→ Click the **export** button  at the *bottom* of the page

All Regional Collections:

→ Click the **export** button  at the *top* of the page

Note that this function is different to the export button (top of the page) that exists in My Collection to edit and import changes to your collection. The Export to Excel with the excel icon  downloads all the data viewed in the data grid into an excel spreadsheet for your own purposes. You cannot edit your records via this particular export function.

You can export selected or filtered data as well. Either filter your data with the filter box at the top of the grid or use the Filter Control. Once you have filtered your data, click the excel icon .

Standard Reports

CPOS offers seven standard reports that can be downloaded in Microsoft Word or Excel depending on the report. All the reports can be filtered.

Regional Census and Plan

This lists all of the species, and numbers of individual animals, held at all ZAA member zoos, along with the management intentions of each institution regarding each species held. Each year, ASMP publishes the Regional Census and Plan which is based on this report. *Format = Microsoft Word document*

Diversity Index Report

Lists the diversity of species and specimens against the different taxon groups within an organisation's collection. These reports saved over a period of time (annually) can show trends within collection management. *Format = Microsoft Word document*

ASMP by Institution

This report lists all the managed program species held by an organisation and current and planned numbers. It also includes relevant TAG (Taxon Advisory Group), program type and species coordinator and/or studbook keeper information. *Format = Microsoft Word document*

ASMP by TAG

This report lists the current and planned totals for each managed program species by TAG. It also includes relevant program type and species coordinator and/or studbook keeper information. *Format = Microsoft Word document*

Species Listing

This is a simple species listing that CPOS supports. It displays common and scientific name. *Format = Microsoft Excel document*

ASMP Positions by Institution

This report lists position holders according to the ZAA Institutional Member they are employed by. This is a useful report for information on species coordinator and studbook keeper information. *Format = Microsoft Excel document*

ASMP Positions by TAG

This report lists position holders according to TAG. This is a useful report for information on species coordinator and studbook keeper information. *Format = Microsoft Excel document*

Abbreviations & Definitions

Management Category	Key attributes
CONS = Conservation Program	<p>Involves a species that has a documented role in a formal recovery effort*. Typically managed to a high level of genetic and demographic rigor.</p> <p>Typically a Captive Management Plan would be developed for species in this category.</p> <p>Typically a studbook would be developed and maintained for all species, unless the sole focus of the program is a single generation turns around to the wild e.g. some frogs.</p>
PMP = Population Management Program	<p>Involves those species that are of regional/global significance due to their threat status or strategic importance to Australasian collections. All will be managed to a high level of genetic and demographic rigor.</p> <p>For all exotics and some native species a Captive Management Plan would be developed.</p> <p>Typically a studbook would be developed and maintained for all species.</p>
MON = Monitored Species Program	<p>Largely involves NZ fauna where NZ Government requirements specify the need for some level of reporting around a majority of species.</p> <p>Also applies to a smaller number of other species where monitoring of the population dynamics or specific husbandry issue is considered useful. May also be used for species held in groups or otherwise unsuited to PMP management.</p> <p>A studbook would only be developed and maintained where the population is both large and semi-regular pairings are requested to avoid inbreeding e.g. koala's and marine mammals.</p>
NRP = No Regional Program	<p>For all taxa either not assessed or not currently deemed a regional priority for intensive management at this time.</p>
NR = Not Recommended	<p>A species formally recommended by the relevant TAG and endorsed by the ASMP as not to be acquired by member institutions. This category should ideally be used infrequently.</p>
PO = Phase Out	<p>A species formally recommended by the relevant TAG and endorsed by the ASMP as to phase out by member institutions. Following more than a decade of formal collection planning this category should be seen less frequently.</p>

Further Assistance

*If you need any assistance with using the Collection Planning Online System please contact the Zoo and Aquarium Association office on +61-(02)-9978 4797 or email **asmp@zooaquarium.org.au**.*