



ZOO AND AQUARIUM ASSOCIATION

Collection Planning Online System (CPOS)

User Guide

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Member Access



Logins

There are two permission logins available to organisations:

1. **Editing your collection** (this unique login is provided to the record officer or the person responsible updating census data in your organisation)
2. **View all regional collection data** of all member organisations and download data (this login is available to member staff)
 - Username: **user**
 - Password: **wildlife**

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. This is not 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 or you can click the button **Return to Landing Page**.

Top Navigation

The screenshot shows the top navigation area of the application. It includes a main menu with four tabs: 'My Collection', 'All Regional Collections', 'Position Holders', and 'Standard Reports'. Below the tabs are two buttons: 'Show Customization Window' and 'Revert to Default Sort by Taxonomic Sequence'. A 'Grouping Tool Bar' is located below the buttons, with the text 'Drag a column header here to group by that column'. Below the tool bar is a table with the following columns: '#', 'Scientific Name', 'Common Name', 'UNK', 'Planned', 'Planned', 'Planned', and 'Implementation Option'. Red arrows point from the labels on the right to the corresponding elements in the screenshot.

Main Menu

Extra Functions

Grouping Tool Bar

Column Headings

Filter Input Fields

Main Menu

My Collection - displays information on your organisations collection of animals. By default species are sorted by taxonomic sequence.

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

Position Holders - view current species coordinators, etc.

Standard Reports - download standardised reports regarding your organisations collection. Reports are being developed in April 2013 and will aim to be available by **30 June 2013**.

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

| ICON KEY | |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Edit existing record. |
|  | 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. |
|  | Hover over this icon to view TAG notes or click on this icon to display the TAG note column. |
|  | Indicates Institutional notes on the collection record. |

Editing a Collection

Adding a new record

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. If the species does not appear, please contact the Zoo and Aquarium Association office (61-2-9978-4797).
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
6. Click on  to **save** record, or  to **cancel** changes.

Editing an existing record

1. Click on 
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.

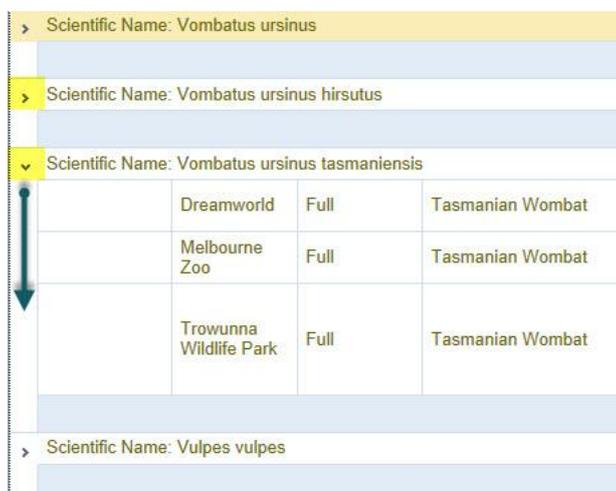
Deleting a record

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

All Regional Collections

Viewing organisational collections

The **All Regional Collections** tab displays a list of species. To see holdings of this species you will need to click on the **arrow (>)** in front of the species name. The institutions holding this species will appear underneath the species name.



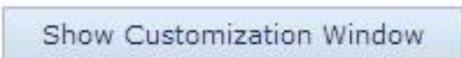
| | | | |
|---|------------------------------------------------|------|------------------|
| > | Scientific Name: Vombatus ursinus | | |
| > | Scientific Name: Vombatus ursinus hirsutus | | |
| ∨ | Scientific Name: Vombatus ursinus tasmaniensis | | |
| | Dreamworld | Full | Tasmanian Wombat |
| | Melbourne Zoo | Full | Tasmanian Wombat |
| | Trowunna Wildlife Park | Full | Tasmanian Wombat |
| > | Scientific Name: Vulpes vulpes | | |

Customising Data Layout and Workspace

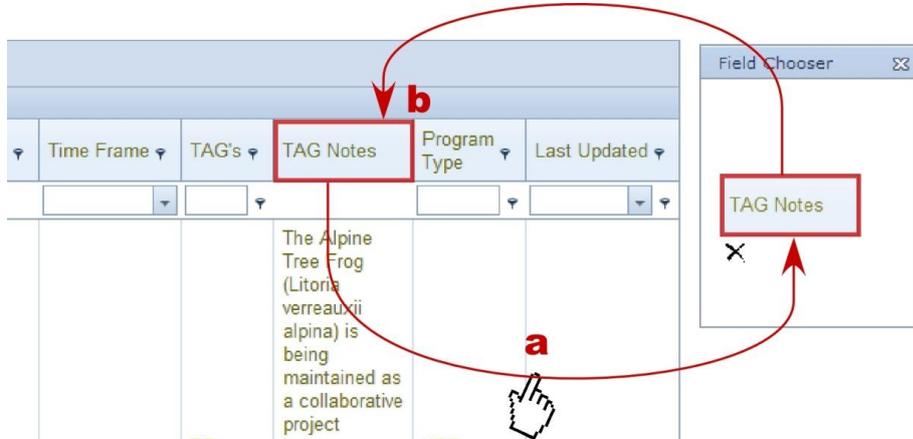
Hiding or revealing columns

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.

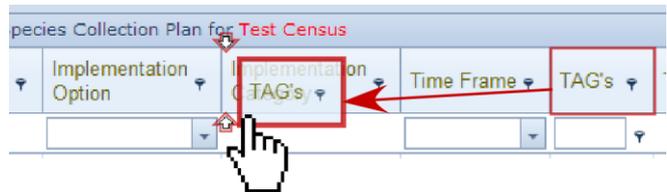
2. A new window “Field Chooser” will appear and will list all **hidden** columns. You can use your mouse to click and drag **column headers** to and from this window.



- 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

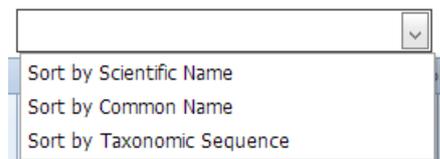
Columns can be moved to customise your workspace. Click and drag the column header to new position.



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.)

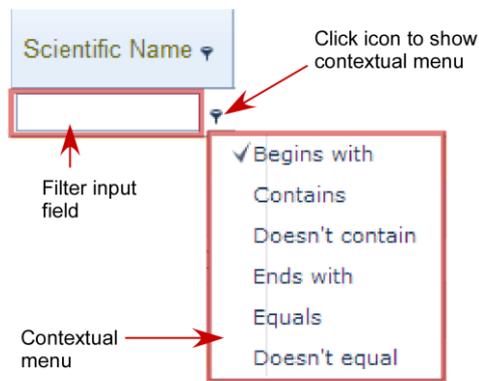
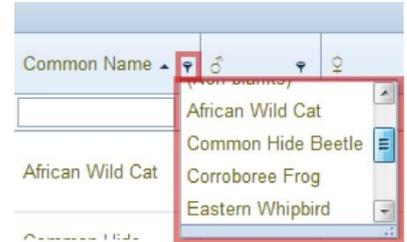


Filtering

There are three different ways of 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. Click on the desired value to filter by.



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

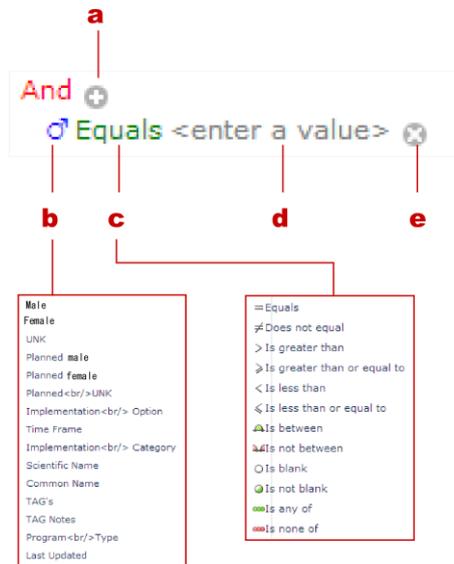
This is an advanced method where you can apply multiple filters to the data set. The Filter Control allows to build a query with Structured Query Language (SQL) statements.



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.



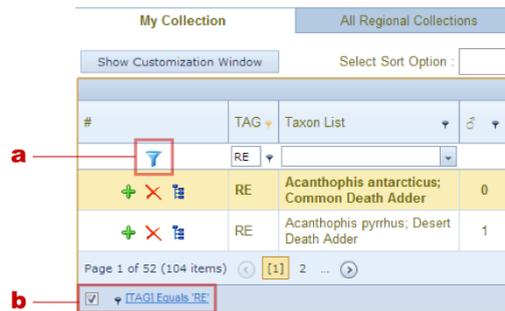
3. A new line will appear where you can build your statement.



- 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



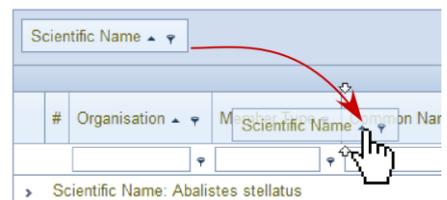
- a. The blue filter icon  when present indicates that a filter is applied. **Click on this icon to clear the filter.**
- b. To **temporary disable the filter**, uncheck the box on the bottom left of the data grid. To reapply, check the box.

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.)



Exporting Data to Excel

The **export** function  is located on the bottom pages of My Collection and All Regional Collections.

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 .

Further Assistance

If you need any assistance with using the Collection Planning Online System please don't hesitate contacting the Zoo and Aquarium Association office on 61-2-9978 4797.