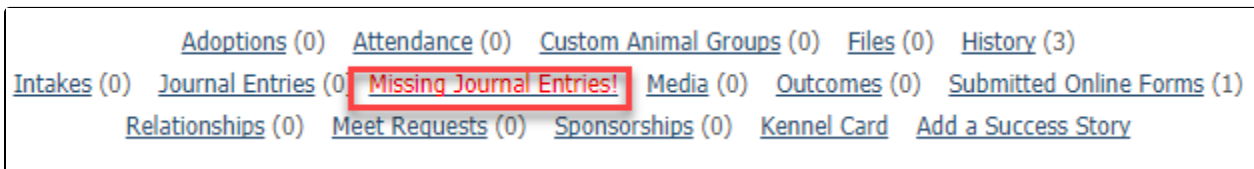


Using the animal journal template Content_v1

Why use the animal journal template?

The animal journal template is used for those journal entries that you use frequently or entries that you want to require. For example, every animal in your organization may have a set of journal entries, like two vaccinations, one spay/neuter, and one flea/tick entry. You can set up a template for those items. Once used, you can see which entries are missing for any particular animal.



The message, *Missing Journal Entries*, will appear on the animal's detail page as well as on the animal's **Journal Entries** page. The **Journal Entry** page will tell you exactly which entries are missing. It's a good way to keep up with medical work or other frequently performed activities.

How the template works

The first time you use the Journal Template, you add categories to it. These are the same categories you use when you add a journal entry type.

A screenshot of the 'Add a Journal Entry Type' form. The form has a title 'Add a Journal Entry Type' and two navigation links: '< Journal Entries' and '< Entry Types'. Below the title is a large text area for 'Description'. To the right of the text area is a dropdown menu labeled 'Category ID *' with a red box around it. The dropdown menu is open, showing a list of categories: 'Choose one...', 'Choose one...', 'De-worming', 'Flea/Tick/Deworm', 'Heartworm', 'Medications', 'Miscellaneous', 'Spay/Neuter', 'Test', and 'Vaccinations'. At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Add Another'.

Within each category are the entry types, either the default entry types you may have added or your own custom entry types. Here is an example of some entry types for one of our organizations.

Combo
comment
Dental
Dewormer
DHLPP
Exam
Fecal
Food change
Frontline
FVRCP
Grooming
Home Again
Instructions

Using the entry types, you create journal entries for each animal. With the journal template, you can add a form for all of the entries at once, to be filled out as the activities are performed.

Adding a category to the journal template

To add a category to the journal template, click the **Add a Category to the Journal Template** button (**Journal Template > Journal Entries**) and fill out the form.


Animal Journal Template

[« Journal Entries](#)



Add a Category
to the Journal
Template

Current View: Default

Actions... ▾ Views: **Default** ▾  

☐ All [Category](#) ▾

Animal Journal Template Category

[« Journal Entries](#) [« Journal Template](#)

Category *

Number of Entries *

Choose One... ▾

Choose One...

De-worming

Flea/Tick/Deworm

Heartworm

Medications

Miscellaneous

Spay/Neuter

Test

Vaccinations

☐ Add Another

Both fields are required for the category to be added to your template:

- **Category:** Select the journal entry category to add to the journal template from the drop-down list.
- **Number of Entries:** Select the number of entries you want to be included in the journal template. For instance, the animal can have only one spay/neuter but may have two feline leukemia vaccines.

Click **Save Template Category** to add the category to the journal template. Check **Add Another** to save and add a new category to the template.

Once your template is in use, you will notice that if the selected journal entries are not completed, there is a notification in red font on the animal detail page for the missing journal entries. In other words, you've made those entries required.

[Adoptions \(0\)](#) [Attendance \(0\)](#) [Custom Animal Groups \(0\)](#) [Files \(0\)](#) [History \(3\)](#)


[Intakes \(0\)](#) [Journal Entries \(0\)](#) **Missing Journal Entries!** [Media \(0\)](#) [Outcomes \(0\)](#) [Submitted Online Forms \(1\)](#)

[Relationships \(0\)](#) [Meet Requests \(0\)](#) [Sponsorships \(0\)](#) [Kennel Card](#) [Add a Success Story](#)

Clicking the red *Missing Journal Entries* text opens the template for the selected animal so that you can fill in the entries. Or you can review to see what entries are missing.


Entry #1 - missing

Category De-worming

Date * 

Entry Type * Choose an Entry Type... ▼

Cost * \$
Journal entry cost is required, so if there was no cost enter "0.00" as t


Comment 

Editing a category in the journal template


To edit a journal template category click the **Edit animal journal category** button next to the journal category, or click the **Edit** button on the journal template category page.

Animal Journal Template

[« Journal Entries](#)








 Add a Category to the Journal Template

Current View: Default

Actions... ▼ Views: Default ▼ 

☐ All

Category ▼

	Vaccinations
	Test
	Spay/Neuter
	Miscellaneous
	Heartworm
	Flea/Tick/Deworm
	De-worming

Removing a category from the journal template

To remove a category from the journal template either select the checkbox next to the category or categories you want to remove and select **Remove** from the **Actions** drop-down menu.

Animal Journal Template

« [Journal Entries](#)



Add a Category
to the Journal
Template

Current View: Default

Actions... ▾
Actions...
Remove

Views: Default ▾



[Category](#) ▾

[Vaccinations](#)

[Test](#)