

Using the animal journal template

If you use animal journals to track animal activities, the **Animal Journal Template** feature may help you. It's designed to add several journal entries at once, and it requires those activities for animals in your care. For instance, if you require a spay/neuter, a set of specific vaccinations, and a particular test for every animal you bring into your organization, you can create templates for those items. Those items are added when you add a journal template to the animal's page. The listing of journal entries for the animal will show you any missing template items.

Where do I find it?

You can find the **Animal Journal Template** page by going to **Animals > Journal Entries** and clicking the **Journal Template** button.

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Animal Journal Entries

Add a Journal Entry

Entry Types

Journal Template

On this page:

- Why use the animal journal template?
- How the template works
- Adding a category to the journal template
- Editing a category in the journal template
- Removing a category from the journal template

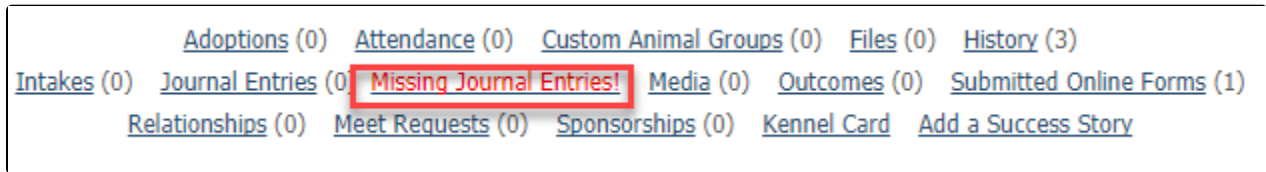
Remember that the site administrator can also perform all tasks.

The following actions are available for the Animal Journal Template with the specified service and user roles:

Action	Description	Services	User Roles
View	View the animal journal template	Data Management Web Site	Journal Admin
Edit	Edit the animal journal template to set the required entries per entry type	Data Management Web Site	Journal Admin

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. It features a large text area for 'Description' and a dropdown menu for 'Category ID *'. The dropdown menu is open, showing options: Choose one..., Choose one..., De-worming, Flea/Tick/Deworm, Heartworm, Medications, Miscellaneous, Spay/Neuter, Test, and Vaccinations. At the bottom left are 'Cancel' and 'Save' buttons, and at the bottom right is an 'Add Another' button with a checkbox.

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

Cancel

Save Template Category

☐ 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... ▼

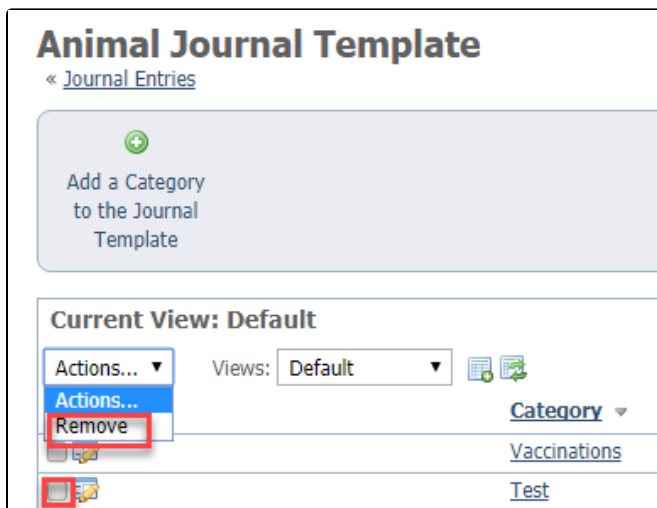
☐ All

Views: ▼ Default

		Category ▼
<input type="checkbox"/>		Vaccinations
<input type="checkbox"/>		Test
<input type="checkbox"/>		Spay/Neuter
<input type="checkbox"/>		Miscellaneous
<input type="checkbox"/>		Heartworm
<input type="checkbox"/>		Flea/Tick/Deworm
<input type="checkbox"/>		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.



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Is there a way to view relationship from the Animal List page?

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Have a question about this topic?