

ZIMS for Studbooks Skills

Studbook Keepers need to master the following set of skills whether the studbook was migrated from SPARKS or PopLink or a new studbook created from ZIMS data.

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1. Know the difference between Suggested Animals and Pending Updates and what to do with them.

These topics are found in your Studbook Dashboard.

Suggested Animals are animals that have been recorded in ZIMS but ZIMS cannot identify them as being recorded in the studbook. Many times, these are new Births/Hatches or they may be animals at an institution that is new to ZIMS and their data has recently migrated. Select View List to see the animal list. If any possible matches for a record that is in the studbook is found, the number of Possible Matches is displayed in that column.

You have four options.

1. You can agree that one of the Possible Matches is correct and choose to link it using the **link icon**.
2. You may not believe any of the Possible Matches is correct (or there were no Possible Matches displayed). If you want the animal in the studbook select to add the record as a **New Animal**.

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3. You do not believe the record should be included in your studbook. Select to **Reject** the record.
4. If you know of a different animal in the studbook that the record should be linked to other than the suggested Possible Matches select to **Manually Link**.

For any of these options, once taken, the record will be deleted from the Suggested Animals list.

Pending Updates are records that have been entered at the institutional level for animals that do have records in your studbook. Updates can be found for Parents, Taxonomy, Sex, Contraception, Rearing and Transactions. Select View List to see these updates. The total number of updates in each record along with the topic grid where the updates are located is displayed.

Selecting the Studbook ID will take you in to the record. The total number of updates displays at the top left. The number of updates in each grid is displayed in the appropriate grid. Any grids with updates will automatically open with both the Studbook Data (left side) and the Institutional Records (right side) open.

Selecting the “?” will display the options available to you – either Accept or Reject the institutional data.

If a record is accepted the data will move into the left-hand Studbook Data side of the grid and become part of the studbook. The icon will change to the Accepted checkbox. If the institutional record is Rejected, it will NOT move into the left-hand Studbook Data side. It will remain in the right-hand Institution Record side and the icon will change to a Rejected circle.

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2. Know how to add a new animal to the studbook

The Suggested Animal functionality allows you to quickly create new studbook records from animals that are recorded in ZIMS. For animals that are held at non-ZIMS institutions you will have to create a new studbook record. To add a new record, select to View List from either the Living Animals in Studbook, All Animals in Studbook or Data Quality lists. Select Add New Animal to Studbook button.

The new record will start off as a Draft record, with the next Draft ID# in line automatically assigned to it. You will need to complete the five mandatory fields – Transactions (starting with an Origin Transaction of a Birth/Hatch), Parents, Taxonomy, Sex and Rearing.

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Once you have recorded data into a mandatory field the grid will display as Completed and the topic at the top will turn green with a checkmark.

You do not have to complete the entire record. Once you exit the record you will be able to find it again to complete under My Animals > Draft Animals in the left-hand dashboard. You can also search by the Draft #.

Once you have completed all of your mandatory fields you will receive the message that you can now add the record to your studbook. Select the Save to Studbook button.

The next Auto-Assigned or Temporary number will display. This number can be edited should you wish. The record now becomes a part of your studbook.

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3. Know how to edit or delete data

There are two ways that you can delete data – from within the record or by using Data Entry Monitoring. Data can only be edited from within the record.

To edit or delete from within the record simply double left click on the desired entry. The record will open in View/Edit mode. To edit make the changes you need right in the record and select the Save button. To delete select the Delete button in the lower left corner of the screen. You will receive a message asking if you are sure that you want to delete it.

Data Entry Monitoring is found under Start > Security Tools > Data Entry Monitoring.

Once open you will need to select the appropriate studbook under Institution/Studbook dropdown. You can filter your search by ZIMS User, Date Range, Record Type and Action Type.

Once you select to Search a list of animals meeting your filter criteria will display. If you want to Undo/Roll Back an entry, highlight the entry and select Undo Selected. The date it was Rolled Back and who chose to do so is displayed in the Rolled Back column. Be very careful using Data Entry Monitoring as you cannot regenerate a record that has been Rolled Back without re-doing the data entry.

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4. Know how to adjust Studbook ID settings

You can adjust what Studbook IDs and Temporary IDs you want assigned. To do this open a studbook > Overview > Studbook Number Settings in the upper right-hand corner.

You can provide a new Studbook ID starting number or a new Temporary Studbook ID number.

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5. Know what the Data Quality codes mean and how to correct the errors

Your Data Quality issues can be found in two places. One is at the bottom of your main studbook dashboard. Here you can filter by High, Medium or Low Priority issues

The second is near the bottom of your left-hand dashboard when you have an Animal List open. Either approach allows you to filter by the various Priorities. High (red) errors are things that may impact the accuracy of your studbook analysis thus affecting recommendations for the population. Medium (green) errors are often empty fields or things that would not actually impact population analysis such as incompatible transactions. Low (yellow) are often not true errors at all but simply a heads up such as a Temporary Studbook ID. Hovering over the “?” will tell you how to fix the error.

Some data that ZIMS sees as an error may not be an error (often due to species biology) and you can dismiss these. You can add a note as to why you dismissed the error.

You can find a document that details the Data Quality codes in the Help Menu located in the upper right-hand corner of all screens. Type in “Studbooks Data Quality Codes” in the search box or find it under Studbook Topics.

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6. Know how to make a Temporary Studbook ID into a true Studbook ID

Temporary Studbook IDs may be used as a number in between a Draft # and the final true Studbook ID. Under Tools in the left-hand dashboard you will find Re-Number Temporary IDs.

You can choose to re-number manually and can re-number just the Temporary IDs that you want to. You can also select to renumber all of your Temporary IDs by selecting the Generate All button.

If you choose to Generate All you still have the option to remove or re-number the ones that you need to before you Save. The Temporary ID order is the order that you entered the record and assigned the Temporary ID. It is not by Birth/Hatch Date.

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7. Know how to number your parental MULTs

You don't have to! If you record a combination of possible parents that already has a MULT# attached to it ZIMS will automatically assign that MULT#. If you create a new combination of parents ZIMS will automatically create the next MULT# in line and assign it to the animal.

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8. Know how to create new Used Defined Fields (UDF)

To add a User Defined Field (UDF) open the Studbook Overview > User Defined Fields grid from your studbook dashboard. Select the Add New icon.

The Field Name must be unique. If you select Field Type of Text, you will use the Description box to record details. If you select Field Type of ComboBox, you have the additional option to record Terms with Definitions.

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9. Know how to delete or unlink an animal

If you have created duplicate records or recorded an animal in the studbook that was inappropriate you will need to delete the record. Open the record and under Actions select Delete Animal.

You also may have linked two records incorrectly. To unlink them open the record and under Actions select Unlink.

If the studbook record has been linked to a record in the Suggested Animals List, it will reappear on that list once unlinked.

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10. Know how to compare two animal records

If you think you have duplicate records in your studbook you can easily compare them side-by-side using Animal Comparison under the Tools menu. Enter the Studbook IDs that you want to compare in the Search Animals box. All the grids in the records will be displayed next to each other for easy comparison. This functionality is also available from within the studbook record itself by selecting the Compare button.

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11. Know how to add a Local Institution

You may need to add a Local Institution to your Institution List. It is recommended to check with Species360 before adding Local Institutions in case they are already on the Global Institution List, but you have not found them. From your studbook dashboard select Institutions on the left. Then select Add New Local Institution.

Complete the screen recording data in as many fields as you have information for. Remember to expand the Location Details field to record contact information. When you Save you have the option to add Synonyms, Contacts and any appropriate Notes to the institution record.

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12. Know how to export animal information

Each individual grid from the animal record can be downloaded as either PDF or Excel.

The entire record can be exported to PDF by selecting Export Complete Animal under the Actions button in the basic information grid.

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13. Know what to do if two GANs in the Husbandry module match a single Studbook animal

If you find two animals in the Husbandry module that match a single studbook record you will need to contact Support@Species360.org. Your support person will guide you through the steps you need to take to get these records merged into one single record.

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[14. Know why a match was not made for a record in Husbandry to the record in your Studbook](#)

First, the animal in the Husbandry record must have been in the region for your studbook at some point in its life. Second, matches on Studbook ID, House Name, Local ID and/or transponder must be exact.

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