

ZIMS for Studbooks Training Index

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Studbooks List

Description: The first screen you are taken to when you launch the Studbook Module is the studbook list – this is a list of all the studbooks you have been assigned access to within the system. You can select any studbook from the list to open and view the studbook information.

Features Available:

- **Basic search:** Quickly search the studbook list by studbook name.
- **Advanced search:** Search the studbook list by additional filters including: regional association, taxonomy, last update date, Currentness date, Studbook Keeper.
- **Pin Studbook:** Favorite a studbook so it appears at the top of the studbook list.
- **Add Studbook Image:** Add an image to represent the studbook.

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- **Navigating to Studbook Dashboard:** Select the studbook name to navigate to the studbook dashboard.
- **Navigate to studbook Living list, Pending Update list, and Suggested List:** Select the quick links to navigate quickly to a specific animal list.

Related Materials:

- [Studbook Overview and Navigation Video](#): Introductory overview of the ZIMS for Studbook Module
- [Studbook List PowerPoint](#): Overview of the Studbook List
- [How to Find an Animal video](#): Overview of how to locate an animal in ZIMS for Studbooks.
- [Search by Identifier Video](#): Overview of the animal ID search
- [How to Pin an Animal video](#): Overview of how to pin an animal in ZIMS for Studbooks.
- [Column Customization Video](#): Customizing the data displayed in the search results

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Studbook Dashboard

Description: This is the main screen for accessing the studbook information.

Features Available:

- **Studbook Overview:** Includes basic information about the studbook and features that impact the studbook data overall. See overview section below for more information.
- **Overlays:** Create assumptions for animal records within your studbook. See overlay section below for more information.
- **Institution List:** View and manage global and local institutions for the studbook.
- **Studbook Activity Stream:** Tracks additions/deletions/edits per individual changes per animal and per user. Studbook IDs are hyperlinks to the animal detail screen.
- **Navigate to any of the following animal lists:** Living, All, Suggested, Pending Updates, Data Quality

Related Materials:

- [Studbook Dashboard PowerPoint](#): Overview of the information on the studbook dashboard.
- [Favorites and Filters](#): ZIMS Studbooks has many filters to help you narrow your animal lists for both Living Animals and All Animals in the studbook.

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Studbook Overview

Description: Includes basic information about the studbook and features that impact the studbook data overall.

Features Available:

- **Studbook Number Settings:** View studbook settings for permanent and temporary studbook numbers and set new starting numbers.
- **Basic Information:**
 - View studbook name, number specimens, last edited date, and start date
 - Edit Currentness date
 - View/edit studbook description, species notes, and conventions/assumptions
- **Taxonomy Details:** View information about the studbook taxonomy
 - View taxonomy included in the studbook (can only be edited by regional association)
 - Set gestation/incubation period and interbirth/hatch interval
- **Assignments:** View the users with access to their studbook and their level of access.
- **User Defined Fields (UDFs):** Add new UDFs or add/edit current UDFs.

Related Materials:

- [Adding Notes:](#) Overview of notes and observations and downloadable list of note types, sub-types and definitions.
- [Managing UDFs:](#) Creating and editing User Defined Fields.
- [Studbook Overview PowerPoint:](#) Overview of information and tools included in the studbook overview.

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Institution List

Description: View and manage global and local institutions for the studbook.

Features Available:

- **All institution list:** View Species360's global list of recognized institutions and the studbook's local institutions.
 - Sort, filter, export this list
 - View information on global institutions
 - Add notes and contacts for global institutions
- **Local Institution list:** View list of all local studbooks institutions. Add/edit information on these institutions.
 - Sort, filter, export this list

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- **Current/Historic Lists:** View lists of current and historic holding institutions for the studbook.
 - Sort, filter, export this list
- **Add Local Institution:** Add a local institution to the studbook institution list.

Related Materials:

- [Institution List Video:](#) Video highlighting the institution list.
- [Getting a Global Institution:](#) Added: Request that an Institution be added to the global list.
- [Institution List PowerPoint:](#) Overview of the global, local, historic, current institution list.

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Overlays

Description: Add assumption data to the animals in the studbook for analysis.

Features Available:

- **Overlay management:** Located on Dashboard. Includes the following features:
 - **Add new overlay:** Add a blank overlay to the studbook.
 - **Edit existing overlay:** Edit the studbook name and description
 - **Delete overlay:** Delete an overlay and all of its records from the studbook.
 - **Copy overlay:** Copy all records in the overlay into a new overlay.
 - **Apply overlay:** Turn on overlay mode for the selected overlay. User can now edit animal data in overlay mode.
 - **Remove Overlay:** Turn off overlay mode and return the studbook to the master view.
- Overlay data in animal records: Once a studbook is applied from the Overlay Management list data can be added to the overlay within the studbook. This includes the following features:
 - **Overlay module notifications:** In overlay mode there will be an orange bar indicating the overlay mode is applied. This displays in all screens. In addition, many screens and buttons are removed from overlay mode.
 - **Edit/Add Transactions, parents, sex, notes:** Add assumption data for individual animals within the studbook for these record types. All other record types are read only in the overlay mode.
 - **Assumptions List:** View list of animals that have been edited in the overlay.
 - **Add Hypothetical Animal to Studbook:** Add an animal to the studbook in overlay mode.
 - **Toggle between overlays and master studbook:** Use the breadcrumb feature to quickly apply different overlays to the studbook or return to the master studbook.

Related Materials:

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- [Creating and Managing Overlays](#): Review of the overlay functionality
- [Overlay PowerPoint](#): Overview of creating, managing and editing overlay data.
- [Overlay overview Video](#): Video introduction to the overlay feature.

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Animal Lists

Description: List of all animals in the population that are currently living (Living Animal List) and list of all animals in the studbook of any status (All Animal List).

Features Available:

- View list of living animals in the studbook
- Navigate straight to the animal husbandry record via the hyperlinked GAN column
- Sort list by columns
- Add/remove columns
- Filter list by a variety of criteria including general, date, institution, UDF under the filter bar
- Save filters and apply them to other lists/tools
- Pin or unpin animals and view them in the “My Animals” list in the left navigation bar
- Add one or more animals to managed groups
- Export list to excel and PDF
 - Export list grouped by holding institution
 - Export list grouped by managed group
- Search for an animal by Studbook ID, Local ID, or GAN
- Show Animal History option:
 - Check the box to view transaction history within the animal list
 - Export with this option checked to include the transaction in the export
- Navigate to an animal’s detail page by selecting the Studbook ID
- Use left-hand navigation to navigate to additional lists/tools

Related Materials:

- [Animal List PowerPoint](#): Overview of the Living and All Animal Lists.
- [Living and All Animal List video](#): Video overview of the Living and All Animal Lists.

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Manually Add New Animal to Studbook

Description: Add animal to the studbook that is not at a ZIMS institution.

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Features Available:

- Add draft animal(s) using the “Add animal to Studbook” button on the Animal List screens.
- View newly created draft animal (system automatically numbers the draft)
- Quick add buttons in the top right corner allow user to add required fields quickly (transactions, parents, taxonomy, sex, rearing).
- Once all required fields have at least one record recorded, the user can add the animal as a permanent studbook animal.
 - System automatically generates permanent and temporary IDs
 - User can manually enter studbook ID
- Actions Button:
 - Pin draft animal
 - Export complete animal detail
 - Delete draft animal
- Pedigree tools
- Add/edit/delete animal events
- Cannot view/accept/reject institutional records for unlinked animals

Related Materials:

- [Adding and Deleting Studbook Animal PowerPoint](#): How to add draft animals to the studbook, navigate to draft animals and save new animals and delete animals from the studbooks.
- [Batch Accession](#): Help with adding multiple animals at the same time.
- [Batch Add Video](#): Quick video demonstrating the batch accession feature.
- [Estimating Dates](#): Help on understanding different types of date estimates in ZIMS.

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Animal Details

Description: Location where an individual animal’s data is managed.

Features Available:

- Add and manage existing labels
- Expand/Collapse all boxes in top right corner
- View studbook animal basic information
- Hyperlink to parents from basic information
- View animal detail in Compare Animal tool
- Accept All pending updates
- View descendant, antecedent, siblings list for animal
- View GAN if animal is linked to Husbandry animal

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- **Action Button:**
 - Unlink linked animal
 - Pin Animal
 - Export to Excel
 - Export to PDF
 - Export complete Animal Detail
 - Delete animal
- **Animal Detail Activity Stream:** View record level changes made within the studbook by user and the data quality issues for an animal.
- **Manage Transactions:**
 - Add/edit/delete animal transaction
 - View institutional records for linked animals
 - Accept institutional records for linked animals
 - Accept institutional records with edits for linked animals
 - Reject institutional records for linked animals
 - Add note to record
 - Export to Excel/PDF
- **Manage Parents:**
 - Add/edit/delete individual sires and dams
 - Add/Edit MULTS parents:
 - Create MULT grouping
 - Assign percentages to potential parents
 - View MULT List
 - View institutional records for linked animals
 - Accept individual parent records for linked animals
 - Accept all parent records for linked animals
 - Add note to record
 - Export to Excel/PDF
- **Manage Taxonomy:**
 - Add/edit/delete taxonomy events
 - View institutional records for linked animal
 - Accept institutional records for linked animals
 - Accept institutional records with edits for linked animals
 - Reject institutional records for linked animals
 - Mark animal as hybrid
 - Add note to record
 - Export to Excel/PDF
- **Manage Sex:**
 - Add/edit/delete sex events
 - View institution records for linked animal
 - Accept institutional records for linked animals

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- Accept institutional records with edits for linked animals
 - Reject institutional records for linked animals
 - Add note to record
 - Export to Excel/PDF
- **Manage Contraception:**
 - Add/edit/delete contraception events
 - View institution records for linked animal
 - Accept institutional records for linked animals
 - Accept institutional records with edits for linked animals
 - Reject institutional records for linked animals
 - Add note to record
 - Export to Excel/PDF
- **Manage Groups:**
 - Add/edit/delete managed group assignments
- **Manage Identifiers:**
 - Add/edit/delete logical, physical, transponder identifiers
 - View institution identifiers automatically for linked animal
 - Export to Excel/PDF
- **Manage User Defined Fields:**
 - Add/edit/delete user defined fields
 - Export to Excel/PDF
- **Manage Notes:**
 - Add/edit/delete notes
 - View notes entered in above grids in animal notes
 - Export to Excel/PDF

Related Materials:

- [Adding Notes](#): Overview of notes and observations and downloadable list of note types, sub-types and definitions.
- [Animal Detail PowerPoint](#): Overview of the animal detail screen. Includes adding, editing, and deleting records.
- [Animal Detail Video](#): Video overview of the animal detail screen.
- [Creating MULT Parents](#): Document reviewing how to create and manage MULT parents.
- [Studbook Labels](#): Managing studbook label functionality.

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Suggested Animal List

Description: List of animals that exist in ZIMS for Husbandry (recorded by institutions).

This list contains two types of Husbandry animals:

- Husbandry animals that the system cannot find in the studbook and is suggesting be added to the studbook
- Husbandry animals that the system found in the studbook and is suggesting be linked to the studbook animal

Features Available:

- View list of Suggested Husbandry animals
- Add/remove columns
- Filter list by local/global and with/without suggested link
- Search for an animal by Local ID, or GAN
- Navigate to a Suggested animal's detail page by selecting the GAN
- Use left-hand navigation to navigate to additional lists/tools
- Export to excel
- Navigate to Suggested Animal detail by selecting the GAN
- Navigate to Possible Match by selecting the studbook ID
- **View Rejected Animals:** List of animals that have been rejected from the Suggested List will display in this screen. Animals on this screen can be added or linked to studbook animals.
 - This list can be sorted, filtered, and exported similar to the Suggested List
- **View Husbandry Data Fix Report:** List of changes to the studbook as a result of merges/splits/deletions of animals in Husbandry. If an animal in Husbandry is merged/split/deleted and it was linked to an animal in your studbook, the reason will display in this list.
 - Search list by GAN
 - Studbook ID hyperlinks to Animal detail screens

Related Materials:

- [Suggested Animal Details](#): Overview of the Suggested Animal List. Including adding animals to the studbook and linking Husbandry animals to studbook animals.
- [EAZA Linking in ZIMS for Studbooks - Where to Start](#): Outline on where to begin when linking animals in ZIMS.
- [Request a Merge of Duplicate Husbandry Records](#): Information on the process for requesting the merger of duplicate holder records.
- [Impact of Merge/Split/Deletion of Husbandry Records](#): Document detailing the impact that merges/splits/deletions in Husbandry have on animals in the studbook.

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Suggested Animal Detail Screen

Description: Detail screen for Husbandry animals that the system is suggesting be added or linked to an animal in the studbook. From this screen the user can add, reject, link to potential match, or link manually to an animal in the studbook.

Features Available:

- **View Basic Information:** View information on the Suggested Husbandry animal.
- **View Animal Detail in Husbandry:** Opens the Husbandry animal module and displays the animal's global view. Only accessible if use has been given access to the animal module by their institution.
- **New Animal:** Add the suggested animal as a new draft animal to the studbook. This will add the animal as a draft animal. All institution records will be available to the user to accept or reject.
- **Reject:** Reject the animal from the Suggested List. It now will be removed from the Suggested List and display on the Rejected List. From the rejected list, the animal can be added or linked to the studbook.
- **View Suggested Matches:** View studbook animals that the system suggests as a match to the Suggested Husbandry animal.
- **Link:** Link the animal to one of the animals listed as a suggested match by selecting the link icon. This will link the Husbandry animal to the animal in the studbook. All institutional records will now be visible on the linked studbook animal.
- **Manually Link:** Select a studbook animal from the list to link to a suggested animal. Once linked the institutional records will now be visible on the linked studbook animal.

Related Materials:

- [Suggested Animal Details](#): Overview of the Suggested Animal List. Including adding animals to the studbook and linking Husbandry animals to studbook animals.
- [Add Studbook Animal PowerPoint](#): How to add draft animals to the studbook, navigate to draft animals and save new animals to the studbooks.

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Pending Updates List

Description: List of animals that have differences between the records in the studbook and the Husbandry animal they are linked to.

Features Available:

- View list of studbook animals with pending updates.

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- Sort list by columns
- Add/remove columns
- Filter list by a variety of criteria including general, date, institution, UDF under the filter bar
- Save filters and apply them to other lists/tools
- Quick filters allow to filter by pending update type
- Pin or unpin animals and view them in the “My Animals” list in the left navigation bar
- Export list to excel and PDF
- Search for an animal by Studbook ID, Local ID, or GAN
- Use left-hand navigation to navigate to additional lists/tools
- Navigate to an animal’s detail page by selecting the Studbook ID: When opening animal detail from this screen, the boxes with updates automatically open with the institutional records expanded so the user can easily navigate to the boxes with updates and begin working through them.

Related Materials:

- [Pending Updates](#): Review of pending update functionality.
- [Pending Updates PowerPoint](#): Overview or accepting and rejecting institutional records.
- [EAZA Pending Updates](#) – Guidelines: Overview of where to be reviewing pending updates in ZIMS.
- [Using the Accept/Reject Taxonomic Changes Tool](#): Help document for using the batch change tool.

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Data Quality List

Description: List of all data quality errors for each individual animal in the studbook. Errors are calculated for animals of any status.

Features Available:

- Filter list by a variety of criteria including general, date, institution, UDF
- Quick filter the list by high, medium, and low data quality errors
- Sort columns ascending and descending
- Add or remove columns from the list
- Pin or unpin animals to My Animals feature
- Export list to Excel or PDF (displays list of errors per animal)
- Dismiss data quality errors to exclude them from the list and total count of errors.
- View the dismissed errors by selecting the checkbox for “Display Dismissed Errors”

Related Materials:

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- [Data Quality Errors Video](#): Overview of data quality error list.
- [Data Quality Error Note](#): Help on using the data quality note feature.
- [Dismiss Data Quality Error Video](#): Overview on how to dismiss data quality errors.
- [Duplicate Local ID Data Quality Video](#): Explaining the new EM-01 error and how to resolve.
- [Death Event and Death Code Local ID Mapping](#): Explaining death event tracking in ZIMS.
- [Data Quality Codes PDF](#): Description of the data quality errors in ZIMS for Studbooks.
- [Data Quality PowerPoint](#): Overview of the data quality error list, filtering, and business rules.
- [Data Quality Overview](#): Help document overview of data quality in ZIMS for Studbooks.

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My Animals

Description: Option on the left hand navigation that allows the user to quickly navigate to an Animal's Detail screen from anywhere in the system. Provides access to pinned, recently viewed, and draft animals.

Features Available:

- **Pinned Animals:** All animals that have been pinned from the animal lists or the animal detail will display here.
 - Select the studbook ID hyperlink to navigate to the animal detail screen.
 - Select the pin icon to unpin animals from the list.
- **Recently Viewed Animals:** The most recent twenty animals will display in this list in the order they were viewed.
 - Select the studbook ID hyperlink to navigate to the animal detail screen.
- **Draft Animals:** Draft animals can be accessed from this list. Once a draft animal is added, it will only display in this list until it is promoted to the studbook as a permanent studbook animal.
 - Select the studbook ID to navigate to the animal detail screen.

Related Materials:

- **Videos:**
 - [My Animals Video](#): Overview of My Animals in ZIMS for Studbooks

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Census Reports

Description: Calculates the total number of animals yearly (on provided date) and the growth rates for the population.

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Features Available:

- Filter report by date, institution, and UDF options
- Graph census data
- Save institution filter
- Hyperlinks to Animal Details
- Sort columns
- Export to excel

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Census Report.
- [Census Report and Graphing](#): Video overview of census graphing feature (pw)

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Age Structure

Description: Display populations age structure, focus on certain age ranges and sex classes and export data.

Features Available:

- Filter population by age range.
- Click through to selected population range.
- Export to PNG, JPEG, PDF and SVG

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Age Structure.

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Publishing your Studbook

Description: How to publish your studbook

Features Available:

- Filter data and column customization to export only the data needed for publication.

Related Materials:

- [Publishing your Studbook](#): Overview of the publishing capabilities in ZIMS for Studbooks.
- [Preparing a Studbook Report](#): EAZA has provided this guide on generating a reporting.

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Reproduction Dashboard

Description: The Reproductive Dashboard is available in ZIMS for studbooks and provides summary reproductive information for your studbook.

Features Available:

- Filter data by breeding status, first/last age of reproduction, life expectancy, and undetermined birth dates.
- Graph data along with the corresponding list of animal data.

Related Materials:

- [Reproduction Dashboard](#): Overview of the reproduction dashboard tools in ZIMS for Studbooks.
- Video overviews are available for the [Reproductive Dashboard](#) and [Lists of Breeders](#).

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Data Exports

Description: Export to PMx for analysis.

Features Available:

- Demographic, genetic, and census report filters.
- Filter by date, institution, and UDF options
- Apply demographic filters to all filters

Related Materials:

- [Export to PMx Help](#): Step-by-step guide on exporting to PMx and creating a PMx project.
- [Export to PMx Video](#): Video guide on exporting to PMx.
- [Guide for Testing PMx](#): Helpful guidelines on how to review the data exported for PMx.
- [PMx Export Documentation](#): Detailed documentation on the PMx export data created from ZIMS.
- [In situ Animals in PMx Export](#): ZIMS for Studbooks PMx export allows the user to include in situ animals into the PMx export to more efficiently manage their full population.
- [PMx Updates](#): Several changes have been released (March 2019) to improve the PMx data exports created by ZIMS. Here is a list and explanation of updates to the exported files.
- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including PMx export.

Description: Full Data Export.

This tool is used to create a complete export of the studbook data in XML format. It can be used for data analysis and research outside of ZIMS.

Features Available:

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- How to do a Data Export
- What information is exported

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Data Export.

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Data Migration Validation Report

Description: Report that compares the data in the legacy application and the ZIMS studbook created during migration.

Features Available:

- View counts in legacy studbook and ZIMS studbook.
- Sort columns and export report to excel.

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Data Migration Validation Report.

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Location Validation Mapping Report

Description: Report that compares legacy software location values to the locations they were mapped to during the migration process into ZIMS.

- View legacy location and location it mapped to in ZIMS
- View Studbook IDs of the animals with each location
- Sort columns
- Export to excel.

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Location Validation Mapping Report.

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Managed Groups

Description: This feature allows users to track groups of animals that are currently managed together. In legacy functionality this functionality was named “social groups” but has been renamed “managed groups” in ZIMS for Studbooks.

Features Available:

- Administration of Managed Groups
- Assigning One or Multiple Animals to Managed Groups
- Managed Group Lists
- Frequently Asked Question

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Location Validation Mapping Report.

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Re-Number Temporary IDs

Description: Assign permanent studbook IDs to animals with temporary numbers.

Features Available:

- View list of all animals with temporary IDs in the studbook
- Re-number individually by entering ID in grid
- Automatically generate individual ID
- Automatically bulk generate IDs
- System automatically creates Identifier in Animal Detail identifier grid for previous temporary ID.

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Re-Number Temporary ID Tool.

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Animal Comparison

Description: Compare two animal details side-by-side.

Features Available:

- Navigate from tools bar or Animal Detail screen. From detail screen animal will be generated in grid.

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- Hyperlinks to parent animal detail screens
- “View Animal” navigates to Animal Detail.

Related Materials:

- [Compare Tool Video](#)
- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Animal Comparison tool.

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MULT List

Description: View list of MULT groupings within the studbook.

Features Available:

- Accessed from tools bar or from parent grid in Animal Detail screen.
- View studbook animals included in the MULTs and the animals assigned that MULT as a parent.
- Hyperlinks to navigate to Animal Detail screens.
- Export to excel and PDF.

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the MULT List.

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Institutional Holdings

Description: Displays the number of animals an institution has held.

Features Available:

- Filter list by current or historic holders
- Quick filter to find institutions within the list.
- Hyperlink to list of animals held by institution.
- Sort columns
- Export to excel and PDF.

Related Materials:

- [Video - Institution Holding Report](#): Overview of the institution holding tool
- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Institutional Holding Report.

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- [Institutional Holdings](#): Documentation of institutional holdings report.

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Pedigree Reports

Description: Grouping of reports that focus around pedigree investigation. Reports include descendant, antecedent, sibling, and unknown pedigree reports.

Features Available:

- **Descendant List:** List of all of the recorded descendants of a focal animal in the studbook.
 - Accessed from tools bar or the Animal Detail screen.
 - Search for animal
 - Navigate to Animal Detail by selecting “View Animal”
 - Filter list by living animals only
 - View Animal History
 - Hyperlinks to animals, and sire/dam
 - Sort columns
 - Customize columns (remove/add columns)
 - Export to excel
 - Visualize with Pedigree Graph
- **Antecedent List:** List of all of the recorded ancestors of a focal animal in the studbook.
 - Accessed from tools bar or the Animal Detail screen.
 - Search for animal
 - Navigate to Animal Detail by selecting “View Animal”
 - Filter list by living animals only
 - View Animal History
 - Hyperlinks to animals, and sire/dam
 - Sort columns
 - Customize columns (remove/add columns)
 - Export to excel
 - Visualize with Pedigree Graph
- **Siblings List:** List of all of the recorded full siblings of a focal animal in the studbook.
 - Accessed from tools bar or the Animal Detail screen.
 - Search for animal
 - Navigate to Animal Detail by selecting “View Animal”
 - Filter list by living animals only
 - View Animal History
 - Hyperlinks to animals, and sire/dam
 - Sort columns
 - Customize columns (remove/add columns)

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- Export to excel
- **Unknown Pedigree Report:** List of all the animals in the studbook with some level of undetermined pedigree.
 - Filter list by living animals only
 - View Animal History
 - Hyperlinks to animals, and sire/dam
 - Hyperlink to number of living descendants
 - Sort columns
 - Customize columns (remove/add columns)
 - Export to excel

Related Materials:

- [Studbook Tools](#): Overview of the tools in ZIMS for Studbooks including the Pedigree Reports.
- [Pedigree Explorer](#): Help document describing the pedigree explorer in Studbooks.

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Data Entry Monitoring

Description: Tool that tracks actions taken in ZIMS data that results in a record being created, edited, or removed. Allows user to undo a record level change.

Features Available:

- View record level changes in the studbook
- Search/filter for studbook record changes
- Undo (rollback) record level change to view it again in the studbook.

Related Materials:

- [Data Entry Monitoring PowerPoint](#): Overview of how to use data entry monitoring to roll back data.
- [Data Entry Monitoring Video](#): Overview of how to use data entry monitoring.

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Regional & Institutional Association Studbook Management

(Available to Regional Association or Institutional Studbook Administrators Only)

Description: Located in the institution module for the region – the Studbooks tab is where the regional associations manage their studbooks. Only available to Regional Association Administrators.

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- Not available to any user not listed as a studbook administrator.
- Explore this by selecting the institution from the start menu > My institution > select the studbook tab
- The role management implementation completed, there are a few minor business rules we may implement to the taxonomy selection.

Features Available:

- **Studbooks Tab:** Located under “My Institution” – this is the location of the studbook management tool.
- **Studbook List:** List of studbooks that are currently being managed in ZIMS for Studbooks (have migrated)
 - Sort studbook list
 - Filter studbook list using the search form
 - Export list to PDF/excel
 - **Actions Button:** Select studbook to quickly assign a user or view/edit studbook information.
 - **Studbook Name:** Name of the studbook and hyperlink to additional information about the studbook. Includes the following information:
 - **View Studbook Button:** Select this button to open the studbook in the Studbooks module.
 - **Studbook Profile:** Edit studbook name, Currentness date, and start date
 - **Taxonomy Details:** Add/edit taxonomy included in the studbook.
 - **Studbook Assignments:** View/add/edit/delete studbook access.
- **Global Studbook Search:** List of users assigned access to a specific taxonomy in the Studbook Module
 - Sort list
 - Search with filters
 - **Email Contacts:** all assigned studbook managers are available via the search
- **Studbook Roles: Create role assignments for Studbooks users.**
 - Sort list
 - Export list to PDF/excel
 - **Action Button:** Use this button to access the following items:
 - **Add New Role:** Add new role to role list.
 - **Edit Selected Role:** Edit role name.
 - **Manage Role Access:** Select features the role should be given access to within a studbook.
 - **Delete Selected Role:** Delete role from Role list.
- **Assignments by Studbook User:** Administrator can create roles that can be granted by studbook users to extend access to additional users.
 - **Create Role:** Role must be created and specifically listed as ‘assignable’

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- **Permit Rights to User For Assignment:** A users rights need to be modified to allow them access to view/add/edit and/or delete from the Studbook Assignments grid.
- **Administration List:** List of Regional Administrators who have the ability to view the Studbooks tab and manage the studbooks within the tab.
 - **Add New Admin:** Add a new administration from the regional association.
 - **Delete Admin:** Delete administrator from the list.

Related Materials:

- [Regional Association Overview PowerPoint](#): Overview of the regional association management tools.
- [Institutional Studbooks](#): Information on locally (non-regionally) managed studbooks.
- [Institutional Studbooks Overview](#): Introduction to Institutional Studbooks.
- [Role Management](#): Documentation of role access available for features in ZIMS for Studbooks.
- [Studbook Admin](#): Documentation on the responsibilities of a Studbook Administrator for regional and institutional studbooks.
- [Studbook User Assignment](#): Quick guide for studbook users on assigning access to studbook data. Note, required admin approval before this feature is enabled.
- [Regional Association Data Entry Monitoring Video](#): Walk through of the data entry monitoring tool for regional associations.
- [Using the Global Studbook Search \(help doc\) \(video link\)](#): Help using the new search tool.

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Migration and Deployment to ZIMS for Studbooks

Description: Speies360 can migrate SPARKS and PopLink studbook data to ZIMS for Studbooks. This process translates all data from the legacy studbook into ZIMS. Studbook Keepers can migrate to a test environment (sandbox) to explore the system and view their data prior to deployment to live ZIMS.

Related Materials:

- [Pre-deployment Checklist](#): Checklist defining items needed prior to migration to ZIMS.
- [Post-deployment Onboarding Guide](#): A list of skills you should know to get started with ZIMS for Studbooks
- [MULT Definition Sheet](#): Document describing how to document MULTs for migration to ZIMS.
- [Choosing a Taxonomy for your Studbook](#): Reviews why taxonomy in ZIMS is important and how to choose the best taxonomy for the migrating studbook.
- [Data Migration/Deployment PowerPoint](#): Overview of the migration/deployment process.

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- [Data Migration Comparison](#): Comparisons of how legacy studbook data migrates to ZIMS.
- [Functionality Comparison](#): How ZIMS for Studbooks features compare to SPARKS/Poplink.
- [ZIMS for Studbooks Quiz](#): Quiz reviewing materials throughout ZIMS for Studbooks.
- [Data Validation Checklist](#): Guide to reviewing studbook data after migration to ZIMS.
- [Migration/Deployment Video](#): Overview of migration/deployment process.
- [Notes and Identifiers](#): Migration from Poplink and SPARKS mapping.

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Creating a New Studbook

Description: In ZIMS, there is the option to create a new studbook from ZIMS data. This tool pulls the ZIMS data for a specific taxonomy and region to create a studbook. All tools available for migrated studbooks are available to studbooks created from ZIMS data.

Related Materials:

- [Creating Studbook from ZIMS Data](#): Overview of the process of starting a studbook from ZIMS data and the features of the studbook.

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Getting Started with ZIMS for Studbooks

Description: Below are materials that will assist the user in getting started with ZIMS for Studbooks.

Related Materials:

- [Getting Started in ZIMS for Studbooks](#): How to log in, access, and get help with ZIMS for Studbooks.
- [Studbook Overview and Navigation Video](#): Introductory overview of the ZIMS for Studbook Module
- [ZIMS for Studbooks for non-ZIMS Users](#): Overview of ZIMS for non-ZIMS users.
- [General ZIMS Preferences](#): Help document on all the preference options in ZIMS.
- [Taking Over a Studbook](#): How to get started in a studbook that has already migrated to ZIMS.
- [Tidying Up Your Studbook](#): A quick guide to bringing your studbook current with ZIMS Data.
- [How to Find an Animal video](#): Overview of how to locate an animal in ZIMS for Studbooks.
- [How to Pin an Animal video](#): Overview of how to pin an animal in ZIMS for Studbooks.
- [Glossary of Terms](#)

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- [EAZA Clean-up Guidelines](#): Guidelines on how to work through cleaning up a studbook that has migrated to ZIMS.
- [EAZA Linking in ZIMS for Studbooks](#) - Where to Start: Outline on where to begin when linking animals in ZIMS.
- [EAZA Pending Updates](#) - Guidelines: Overview of where to begin reviewing pending updates in ZIMS.
- [EAZA Guide for Getting Started](#) - EAZA's guidelines for Studbook Keeping in ZIMS.
- [EAZA Guide for Collaboration between International and Regional Studbook Keepers](#) - EAZA's guidance document to help International Studbook Keepers and Regional Studbook Keepers who share the same studbook database.

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Global Studbook Search Tool

Description: A powerful search tool to help you find global studbooks using various filters

Materials:

- [Using the Global Studbook Search Tool](#): Help document for using the search tool
- [Search Tool Video](#): Video on using the search tool.

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Accept or Reject Batch Taxonomic Changes

Description: When the global taxonomic references change with in ZIMS husbandry you have a powerful tool to update all your records or reject them if they do not apply to your population.

Materials:

- [Using the Accept/Reject Taxonomic Changes Tool](#): Help document for using the batch change tool

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Additional Resources

Description: Additional resources for users of ZIMS for Studbooks.

Materials:

- [Studbook Videos ordered from Newest to Oldest](#): Easy way to catch up on what is new!

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- [Studbook Features Released in 2020](#) and upcoming features planned.
- Yearly Studbook Overviews Videos for [2019](#), [2018](#): Review of newest features built that year.
- [More Tools and Reports in ZIMS for Studbooks](#)
- [Age Outliers Video](#): How to find the oldest animal in your studbook
- [Population Overview PowerPoint](#): Documentation highlighting the Population Overview tool.
- [Species Holding PowerPoint](#): Overview of the species holding report.
- [Using the Studbook Keeper](#): Newsfeed: Overview of using the studbook keeper newsfeed
- [Getting Help with Studbooks and PMx](#): How to get additional help.
- [Studbook and Husbandry Interface Video](#): How ZIMS Studbooks and Husbandry data interact.
- [Local Administrator Responsibilities](#): This document answers some common questions that are asked of the Local Administrator.
- [Finding Regional Association Members Video](#): Overview of how to find regional association members.
- [Practice ZIMS For Studbooks in LearnZIMS now](#): (ZIMS username and password required) Interactive practice in a fake Studbook in our LearnZIMS training environment!
- Webinars for interactive help:
 - [Species360 Hosted](#): Join these sessions when you are getting started and have questions on deployment or on the basics of how ZIMS for Studbooks works.
 - [EAZA Hosted](#): Join these sessions (not managed by Species360) after you have attended the Species360 sessions (above) and if your book hosted by EAZA and do you have questions on linking animals, pending updates and general clean-up of your studbook data.
 - [AZA Hosted](#): Visit the AZA Network (not managed by Species360) and search for ZIMS for Studbook Coaching Calls to sign up for sessions after you have attended the Species360 sessions (above) and if your book hosted by AZA and do you have questions on any SSP processes.

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