

Getting Started Using the ZIMS Application

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1. I have ZIMS! Now What?

Congratulations! Your institution is now the proud owner of the ZIMS application!

This workbook will help you get started using ZIMS. This document is focused on new ZIMS institutions that have not migrated data from ARKS (Animal Record Keeping System, the animal records application prior to ZIMS) but it may also be useful for those institutions to review. It is targeted for Local Administrators although Users may also find it valuable. By taking one small step and then another small step, what may at first appear to be a daunting task can easily be accomplished.

Remember, you do not have to use all the functionality available in ZIMS right away. You can start by simply managing your animal collection and expanding into other functionality data as you get the time and confidence in your ZIMS knowledge. ZIMS is designed so that data entry does not have to fall only to one or two people once you have your basic setup completed. Your Keeper, Curator and Veterinary staff can enter the information that relates to the specifics of their jobs after they receive appropriate training.

The first thing you probably want to do is start entering your animal collection. However, there are some administrative tasks that need to be done before you do so. Otherwise, you will need to go back into your animal records to complete them.

So, take the first step and look at the checklist on the following page. As you read through this document you can select your answers using the checklist and take appropriate actions along the way. We recommend doing things in the order of the checklist.

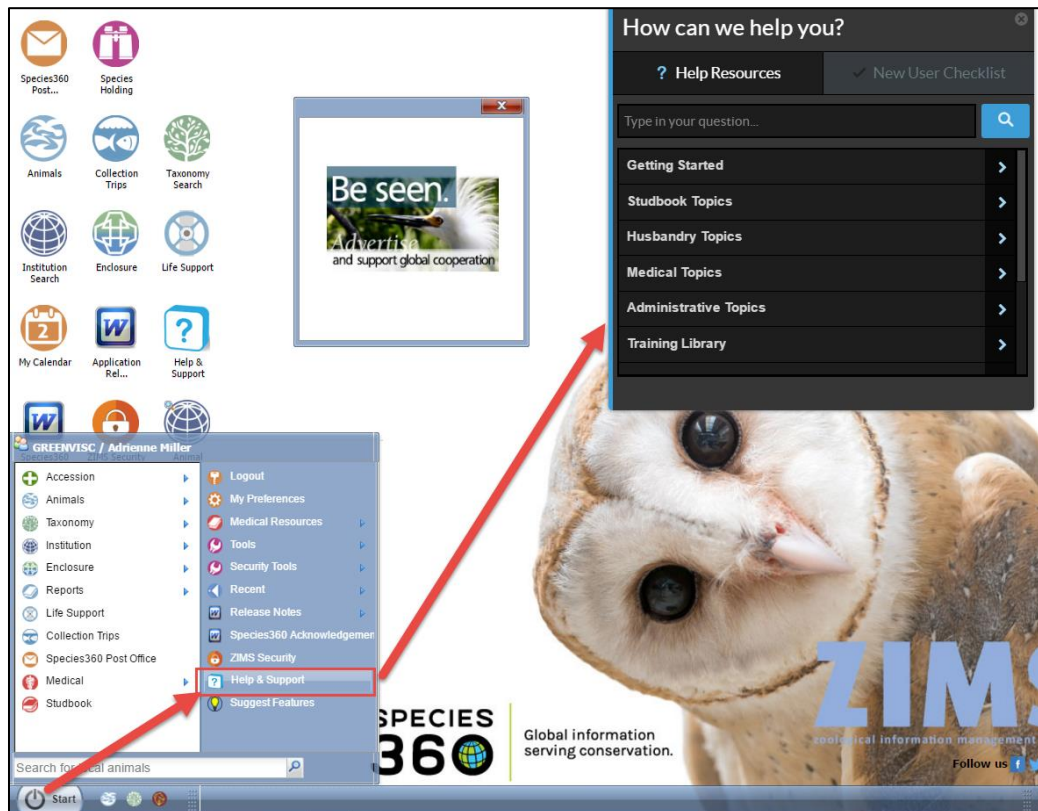
Checklist for Institution Setup	Will not do at this time	Done
Check your Institution Profile and update if needed Start>Institution>My Institution>Institution Profile		
Set your Institution Preferences Start>Institution>Institution Preferences		
Add Teams My Institution>Teams>Actions>Add New		
Add Departments My Institution>Departments>Actions>Add New		
Add Staff My Institution>Staff>Actions>Add New		
Review Template Roles My Institution>Husbandry/Administration Roles>highlight Role>Actions>Manage Role Access		
Create Custom Roles My Institution>Husbandry/Administration Roles> Actions>Add New		
Assign Roles My Institution>Staff>highlight Staff member>Actions> View/Edit ZIMS Login Details		
Add Collections My Institution>Collections>Actions>Add New		
Add Enclosures Start>Enclosure>Enclosure>Add New		
Start Accessioning Animals! Details on Accessioning Checklist		

2. Getting Help

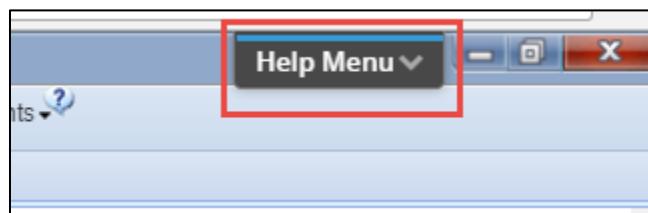
Remember that you are not alone in your ZIMS experience. When you need help there are many opportunities to get it.

Help Within ZIMS

There are Help documents available directly within the ZIMS application itself. One approach is to select Start > Help & Support. This will open the Help menu.



Selecting the “Help Menu” button in the upper right hand corner of all screens will also open the Help documents.

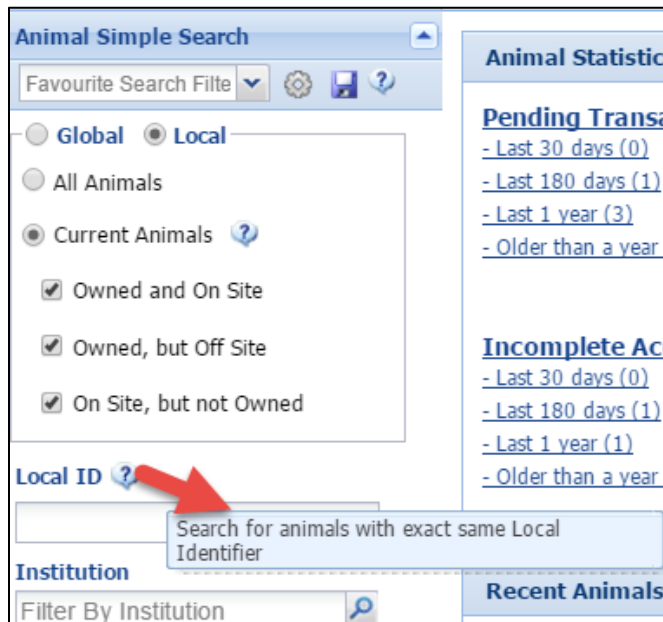


You can expand any of the topics or type in your question in the lookup to help you find it. The various icons indicate the type of help that the topic is:

- Paper airplane = PowerPoint or PDF document

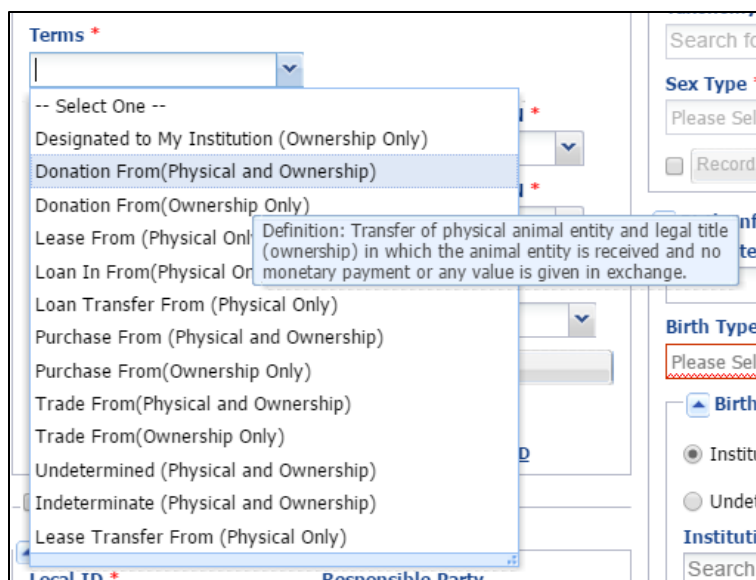
- Conversation bubble = WalkMe walkthrough that will show you step by step actions for performing that function or a video of performing the flow. Some videos still have the video arrow icon.
- Google “g” = Link to a Google document
- Triangular arrow = Vimeo video

You can also get instant Help for some questions by hovering over the “?” beside many of the fields. Below we are in an Animal Simple Search and hovering over the “?” beside the Local ID.



Data Standard Definitions

Data Standards are lists of terms that you can select from and are meant to replace free text fields that are not easily searchable. To help you understand the terms and select the correct one, when you hover over the term a definition will display. Below we see the definition for a “Donation From (Physical and Ownership)” transaction.



Species360 Member Support Staff

Your ZIMS deployment person is now your Species360 Member Support person. Do not hesitate to contact them if you have any questions at support@Species360.org. They are happy to help you and enjoy interacting with ZIMS Users. It is best to ask a question than to do something incorrectly or to get frustrated.

Animal Records Groups and Associations

Many regions have animal records groups or associations that offer support and guidance to animal records keepers. This can be very helpful as many records keepers work alone and have questions that only other records keepers can answer. Do not hesitate to reach out to and join these groups.

***HINT: At the first sign that you may need Help do not hesitate to get it!
You are not in this alone!***

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3. Getting Started

There are six main topics that you will need to address. These topics should be addressed in the order given as some depend on what you have done prior. For example, you cannot assign ZIMS access until you have created your Staff list.

- Set Institution Preferences
- Create Teams and Departments (it is recommended that these are created first, if you are going to use them, because when you are creating Staff you can assign them to Teams and Departments during that process and not have to go back to do so)
- Create Staff
- Assign ZIMS Access (Roles)
- Create Collections
- Create Enclosures
- Record Animal Transactions

All of the data entry screens for these topics have some mandatory fields where data MUST be entered before you can Save the record. These fields are marked with a red asterisk. If you know the information in the non-mandatory fields you should fill in as much as you know, but these fields are not required to save the record. DO NOT CREATE FICTION! If you do not know information in a mandatory field you should enter one of the following:

- Undetermined - you do not know the information at this time but may find it later.
- Indeterminate - you do not know the information now and you never will know it. A good way to remember the difference between the two is the first letter - Indeterminate is Impossible to be known.

HINT: Keep it simple at first! There is no need to get complicated until you have mastered the first basic details.

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4. Setting Preferences

Taking the time to set some of your Preferences will ultimately save you time with your data entry so it is worth the few minutes it will take to set them. Individual User preferences are found under Start > My Preferences and what you select impacts ONLY you. Institution Preferences are found under Start > Institution > Institution Preferences. The Local Admin usually sets these preferences, and some may overwrite what Users have selected for My Preferences.

Some My/Institution Preferences to set to save you time are:

- Language, Date/Time and Separator Formats
 - Date Edit Format – this will allow you to record dates in the format that you are the most comfortable with
- Measurement Preferences
 - Default Unit for Length and Weight – this can save you time because the default unit will be what you use the most often (but it can always be edited)
- Application Preferences
 - Default Responsible Party – you can select to use whoever is logged in or a specific staff member. This saves time because you do not need to fill in that field unless it needs to be edited
 - Identifier – this allows you to shorten reports by selecting to display only the identifiers that you have recorded or only identifiers that are currently active.
 - Module Boxes – each module can be checked to have all of the data fields default to being expanded

If you are a Local Admin you can set Institution Preferences. These preferences will be the defaults for any Users that you add after setting them. Some of the Institutional Preferences affect how the ZIMS application functions so are not available at the My Preferences level. Consider carefully before selecting the following Institution Preferences:

- Enclosure Preferences – Allow Multiple Enclosure Assignment
 - This will allow you to put animals into more than one enclosure at the same time
 - If this is selected and an animal is moved into a new enclosure ZIMS will not automatically move it out of the previous enclosure
 - To keep it simple it is recommended that you **DO NOT** check this box at this time. Should you wish to you can check to allow multiple enclosures at a later date

- Application Settings - Enable Auto-incrementing Local ID
 - The ZIMS application will assign the GAN (Global Accession number) but you are responsible for assigning your Local ID when you accession an animal. This option will automatically prefill the Local ID with the next available one.
 - It is highly recommended that you **DO** check this box. The easiest Local ID assignment is to start with “1” and go from there. Coding of Local IDs is not recommended.
- ZIMS Accessibility and Features
 - Advanced Access Management Features
 - This option lets you turn on External sharing, Provisional Data Entry, and the option to not display medical weights in the husbandry record
 - This is also where you would turn on Advanced Access Management if desired. Contact supprt@Species360.org for information on AAM
 - Medical Records Sharing
 - Select the level of Medical Sharing desired (you must have Medical Admin rights to do this)
 - Optional ZIMS Modules
 - This is where you can turn on the Care and Welfare module
 - Session Settings
 - Force Single Session
 - If this is checked a User cannot log into ZIMS if they are already logged into it on another computer. It is recommended that you do this at the individual Staff level
 - Limit Access By IP Number
 - This option allows you to limit what computers can access the ZIMS database. It is an added level of security. However, it is recommended that you **DO NOT** select this option at the Institution Preference level as you run the risk of locking yourself out. If you want to limit a Staff member’s access you can do so when you add Staff.

Be very careful with what you select when saving your Institution Preferences:

- Save - your selection will be the default for any new Users that you add. It will NOT affect any current Users My Preferences
- Save & Apply For All Users - this will be saved for ALL Users, new and old, even if their My Preferences are different

HINT: Be very careful when selecting Save & Apply to All Users!

All Users should also be able to set their own Preferences. These My Preferences will override the Institution Preferences for that User unless the Local Admin has selected to Save & Apply For All Users. My Preferences is also where you can change your password or email address.

HINT: Take the time to save time by setting your Preferences to make your data entry faster!

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5. Creating Staff, Teams and Departments

When your institution is created by the Species360 Global Administrator, one User is created at the Local Admin Role level (more on Roles next). ZIMS is designed to be used by multiple staff members so the responsibility for data entry and retrieval does not need to fall on one person's shoulders. However, you may find it easier to begin with only one person recording the data.

Staff, Teams and Departments can all be recorded as Responsible Parties. Assigning Teams or Departments as a Responsible Party allows you to assign multiple people as responsible because multiple Staff can be assigned to them. If you want to use the Advanced Assessment Management feature you will need to create Departments and assign Staff to them (contact support@Species360.org for information on this feature).

What comes first? Creating Staff or Teams/Departments? It is really your choice. When you add a new Staff member you can assign them to a Team or a Department during that process. If Teams/Department are created after your Staff is recorded, you can easily assign members to each from within the Team/Department record.

You may want to add staff members that you do not give access to use ZIMS. If you want to select them as a Responsible Party (person who is responsible for the animal/group or enclosure) or someone who made an Observation, they will need to be added to your Staff list to appear in the dropdown list to select from.

HINT: Because you will be working in My Institution quite a lot while you set ZIMS up, try dragging it to the desktop from the Start menu!

To add a Staff member, go to Institution > My Institution > Staff > Actions > Add New. The first time you add a Staff member you may want to follow the "Add Staff Person" Help walk-through found in the Help Menu as mentioned in the Getting Help section. Every Staff member will need to have their own unique and valid email address. The Staff member will receive a confirmation email from ZIMS to ensure the account is active. If you have not yet added any Departments or Teams there will be nothing to select from in those fields and they can be added later.

You are encouraged to check the "Make User Visible Outside My Institution" checkbox. This allows your colleagues to see the Staff member when looking at your Institution information and they will also display in the ZIMS Contact Directory. If you

need to edit any information at a later date, select to View/Edit Staff Details under the Actions menu.

Once the Staff member has been added you should complete the information in the View/Edit Communications Details screen also available under Actions. This will help your colleagues contact the Staff person should they wish to.

To add a Team, go to My Institution > Teams > Actions > Add New. The Team Name must be unique but you can have multiple Teams with the same Team Type. Your Staff members will appear in the left hand box. You can add them to the Team by using the arrows or double left clicking on the name.

To add a Department, go to My Institution > Departments > Actions > Add New. As for Teams the name must be unique. To add members, select the Add Department Member option. All Staff will be available to select from in the drop down list.

HINT: If you are the only one entering or retrieving data and you do not wish to assign another Staff member as a Responsible Party or Observer you can enter additional Staff at a later date.

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6. Assigning ZIMS Access (Roles)

You have been assigned the Role of Local Admin. This Role has access to Search/View, Add, Edit and Remove data in all husbandry modules. If you want other Staff members to enter or retrieve data, you will need to assign them a ZIMS Role. This Role determines what access they have in ZIMS.

ZIMS access is assigned by:

- Search/View – the data can be searched for and results can be viewed.
- Edit – existing information can be edited.
- Add – new information can be added.
- Remove – existing information can be removed from the database.
- Provisional – “temporary” data that must be approved by a Local Admin before it becomes a true part of the ZIMS database

ZIMS deploys with a list of Species360 Roles that cannot be edited by your institution. To see what ZIMS access the Role has go to Husbandry/Administration Roles > highlight Role > Actions > Manage Role Access. Scroll through the various modules to view the access.

- Local Admin (Species360) – this Role has access to all functions available in the Husbandry module. This is your Role.
- User (Species 360) – this Role has access to almost all the functions of the Local Admin Role except for some administrative Institution functions. This may be a good Role to assign to Curators after they receive some training.
- Read Only (Species360) – this Role has Search/View access to almost everything. This is a good Role to assign to your Staff as their first Role. They can look at most everything but cannot add/edit/remove any data.
- Population Manager (Species360) – this Role has access to Search/View topics, reports and tools that would help Studbook Keepers and Population Managers
- Vet – Husbandry (Species360) – this Role has access to view almost all of the functionality in the Animal module as well as record certain Vet-related data in addition to Viewing much of the information in the other modules with limited data entry. This Role would be assigned to your Vet or Vet Tech.
- EOZ (Species360) – This Eye on ZIMs role has limited Search/View access. This would be a good role to assign to your Education Staff or Public Relations person.

- Regional Association (Species360) - this Role allows staff of Regional Associations to manage their members. This is not assigned at the institution level.
- Parent Institution Staff Management Only (Species360) - this Role is only used if your institution has child facilities operating under its umbrella.
- University User (Species360) - this role has access to search/view some Global Reports and Tools and Animal Charts

HINT: It is recommended that you have two Local Admins at your facility to allow for time off or unintentional lockout.

You can also create custom Roles if the Species360 templates do not meet your needs. These custom Roles can be edited as needed. If you want to create custom Roles go to My Institution > Husbandry/Administration Roles > Actions > Add New. The Role Name must be unique to your institution. You can select a template Role (Species360 or another custom Role you have created) to get you started, or start with a blank slate. From the Role grid select the new Role > Actions > Manage Role Access. Select the appropriate module, check the Turn on Module Functionality and select the access that you want the Role to have. Remember to Save before moving on to the next module.

To assign a Role to a Staff member so they can use ZIMS go to Staff > highlight name > Actions > Edit ZIMS User Details. You will need to check the ZIMS User box to activate the screen. To assign a Role highlight it on the left and select the arrow to move it over to the right. You can also double left click. Any Roles that are displayed on the right Selection box will be assigned to the Staff member once you Save. It is recommended to assign only one Husbandry or Medical Role to each User. This makes it easier to see what access the User has and also makes it easier for Member Support to help out with what may be Role related issues where multiple Roles can cause confusion.

If you want the Staff member to sign into ZIMS from only one computer at a time, check Force Single Session. And if you want them to be able to login only from a specific computer check Limit Access by IP Address > Actions > Add New and complete. This IP address restriction will apply only to this single User and not to all Users as limiting IP addresses in Institution Preferences would.

It is easy to change Role access as your Staff becomes trained by adding/removing Roles from the left hand side. It is recommended that first access be with a Search/View only Role so that no data is changed inadvertently by untrained Staff.

HINT: It is recommended that you select from the Species360 template Roles and create custom Roles later when you have more experience with the application. Species360 Templates Roles will be automatically adjusted as new functionality is deployed. You will need to manually update any custom Roles.

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7. Data Migration Templates

Instead of entering your data directly into ZIMS to get started, you may opt to use a Data Migration Template. Data Migration Templates were created to assist onboarding institutions with a low-cost fast method of establishing their current collection information in the ZIMS application through the use of an Excel file. No ZIMS training is required to complete these Templates and multiple people can assist with completing them.

Species360 will provide you with the Data Migration Template and instructions. Once completed you submit the file to your designated Species360 Member Support person. Species360 runs a test migration and informs you of any incorrect or missing data and how to correct it. You repair these errors and resubmit. This process may repeat until all data entry errors have been fixed.

The Data Migration Template and migration into ZIMS of your current collection comes at minimal cost to the member institution. Institutions wishing to migrate historical information should contact their Species360 representative to inquire about a quote for more extensive migration work.

For information on the Data Migration Template contact support@Species360.org.

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8. Creating Collections

Collections are the way you can organize your animals into different groupings as per the reason that you have them. When you deploy in ZIMS there are two Collections available. The Main Institution Animal Collection is where most of your exhibit and breeding animals will be placed. This is a Global collection meaning that any animals placed in it can be viewed at the Global level. This Collection can be edited.

There is also an Incomplete Accessions Collection. This Collection is where any Incomplete Accessions will go by default. Incomplete Accessions are new accessions with minimal information that are created so information can be recorded on the animal before a full Accession is created. An example is receiving an animal that needs medical care when your Registrar is on vacation. You cannot choose to place an animal in this Incomplete Accessions Collection. This Collection is Local view only, meaning that only your institution's staff can view the animals in this Collection. This Collection cannot be edited.

You can also create many other Collections to handle animals in Quarantine, Education or Research to name a few. Go to My Institution > Collections > Actions > Add New. The only Collections that have the option to be marked as Local view (only your institution can view them) are Research and Feedstock, all others are Global by default and cannot be changed.

HINT: Do not worry about creating different Collections at this time unless you have a great need for them. As you start accessioning animals you can determine what Collections are needed.

For help with adding Collections go to [Add New Collection](#)

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9. Creating Enclosures

Your enclosures are where your animals and groups are held within your facility. They can be exhibits, off-exhibit holding pens and even sky kennels. There are many reasons for tracking what enclosures an animal has occupied. The top two are:

- Tracking exposure to disease and parasites
- Assisting with parentage determination (if the male was nowhere near the dam at the time of conception then he is not the sire unless you used artificial insemination)

If you migrated from ARKS (the records application prior to ZIMS) your enclosures will migrate over. If you did not migrate, when you deploy, a top-level Enclosure, your institution, is created. If only your top-level enclosure is there, all of the animals you hold will be placed in this enclosure, meaning they are physically at your institution. ZIMS has the ability to create a very detailed enclosure tree with many Enclosure and Sub-enclosure relationships that will help you to better manage your collection. Creating Sub-enclosures means that you can select a set of related enclosures in your searches and reports.

This is a very simple example of an Enclosure Tree:

- YOUR INSTITUTION
 - Reptile Building
 - Tank One
 - Tank Two
 - Tank Three
 - Primate Building
 - Exhibit One
 - Holding One
 - Exhibit Two
 - Holding Two
 - Exhibit Three
 - Holding Three

Using the Primate Building as an example, with the tree set up this way you can find animals/run reports by selecting Primate Building (and include sub-enclosures). You will get animals held in all three Exhibits and all three Holding areas. If you select Exhibit Two (and include sub-enclosures) you will get only animals in Exhibit Two and Holding Two.

The reason you should create some basic enclosures now before accessioning animals is that “Enclosure” is a required field during an accession. If you do not have your main enclosures recorded, all your animals will be placed under your main institution, and this provides little relevant information.

To add an Enclosure, open the Enclosure module > Add New.

- Name (mandatory) - When you name your enclosures **DO NOT** name them using the species that is occupying them at the time. This may seem like the best solution to naming right now, but over time occupants often change and you may end up having wallabies in your “Lion Exhibit”. The enclosure name can be used in quick search grid and will be displayed in templates.
- Category (mandatory) - This will drive what Type you can select for the Enclosure. It also drives the measurements that you can record on water quality or environmental readings.
- Identifier (optional) - A free text field to be used as you like, perhaps a shortened version of the Name. The identifier cannot be found in the quick search grid and will not display in templates.
- Type (mandatory) - Driven by the Category this is the specific kind of enclosure that it is.
- Parent Enclosure (optional) - This will default to your institution if nothing is recorded in that field. The first enclosure you add will need to be under your Institution as the Parent.
- Location (Within Institution) (optional) - A short free text box that may help others to know what enclosure this is.
- Responsible Party (optional) - If you have created Teams this is a good place to select them.
- Movable Enclosure (optional) - The enclosure is small enough or mobile enough to move between locations.
- Walkthrough (optional) - Your visitors can enter the enclosure and often interact with the occupants.
- Operational Date (optional) - If you try to place an animal into an enclosure before its Operational Date you will get a warning, but you will be allowed to do so.

You can also add a new enclosure directly from the tree by right clicking on the enclosure that you wish to be the Parent enclosure and selecting Add New Enclosure as a Sub. When adding this way, the Parent enclosure will prefill, saving you data entry time.

You can also record a large amount of information on your Enclosures such as dimensions, barrier materials and substrates as well as planned taxa for the Enclosure. You can also record environmental and water quality measurements.

HINT: For right now do not worry about creating a complicated tree and recording all your detailed Enclosure information on them, simply get your main Exhibits and Holding Areas entered so you can select them when you accession your animals.

For help with adding new enclosures go to [Add New Enclosure](#)

You are now ready to start entering your animals!

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10. Animal Transactions Overview

Read this section in its entirety before starting to enter animals. It will give you some ideas before you do actual data entry and may help avoid having to go back and edit. You will be entering three different types of transactions:

- If another ZIMS institution has recorded receiving an animal from you or sending an animal to you, these transactions will be in your Pending Transactions in the Animals module. Pending Transactions are a good place to start adding animals into your collection. One reason is this will clear up Pending Transactions for the other institutions also. Because much of the information will already be entered these will be quick transactions. For Pending Transactions you are actually creating a Visit and not an accession as animals are accessioned into the ZIMS database only once, then all other transactions created are Visits.
- There may be animals that have already been accessioned into the database by other ZIMS institutions, but they have not recorded a transaction with you. You will need to find them and create Visits for them.
- For animals that have not already been recorded by other ZIMS institutions you will need to create a brand-new Accession into ZIMS.

Individual Versus Group Records?

If animals can be individually identified, they should be recorded as Individual Animals (see Importance of Identification below). If animals cannot be individually identified, they should be recorded as a Group of Animals. Groups should be of the same species or sub-species. A group record does not allow for entering data on a specific member of the group. All information refers to all members of the group as a whole. There is more information on Group records later.

Importance of Identification

For your Individual Animals it is very important that they be identified with more than a logical identifier. A logical identifier is something you cannot see such as a Local ID or a House Name. All animals should have a physical identifier to avoid confusing animals. Physical identifiers can be artificial such as a tag, band, tattoo, or transponder. They can also be natural such as unusual coloration, physical characteristic, or scar (be careful with this as they can heal). Images can also be used for identification.

Recording Local IDs

When an animal/group is first accessioned into the database it receives a Global Accession Number (GAN) that is assigned by the application. The GAN will never change. In addition, each institution assigns its own Local ID. The simplest way to

record Local IDs is to start with “1” and go from there. Some institutions like to code their Local IDs. An example would be using prefixes such as “M” for mammals and “B” for birds. ZIMS has the ability to auto-increment your Local IDs and this saves you having to keep track of what the next Local ID is. Auto-increment Local IDs is found under Institution Preferences > Application Settings. Auto-increment cannot be used if Local IDs are coded for various species. To keep it simple it is recommended that you start your Local IDs with “1” and select “Auto-increment Local IDs” unless you already have Local IDs assigned.

You can also keep a Word or Excel log of the relationship between the Local IDs and the GAN that is assigned by the application.

A simple Accession Log:

Local ID	GAN	Taxonomy	Common Name	Sex/Count
1	PLT13-9275837	Ginglymostoma cirratum	Nurse shark	male
2	PLT13-9483727	Dendrobates sirensis	Poison dart frog	0.0.20

A more detailed Accession Log:

Local ID	GAN	Taxonomy	Common Name	Sex/Count	Acquisition Date	Acquisition Type	Disposition Date	Disposition Type

What Animals do I Start With?

Before you start adding animals into your collection you should have an organized plan as to how you are going to do it. As previously mentioned, if you have animals in your Pending Transactions – By My Institution tab it is best to start with them as the sending/receiving institutions will be waiting for you to take action.

The following order is recommended:

- Animals in Pending Transactions – By My Institution tab where you are the Receiver
- Animals in Pending Transactions – By My Institution tab where you are the Sender

- Current animals who are Parents to other current animals in your institution. You should enter parents first before you enter the offspring because they can then be selected in the Parent Info grid when accessioning the offspring.
- Animals you currently have on site.
- Animals you own but are physically held off site.
- Now you can start entering any remaining animals that have died or been dispositioned.

If you record information on a studbook species the information will be automatically available to the studbook keeper in the Studbook module via Suggested Animals for new accessions or Pending Updates for updates to animals already in ZIMS.

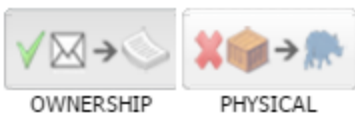
Physical and Ownership

In ZIMS the record of where the animal/group is physically located and who has legal title to it are recorded separately in transaction recording process. Read the hover over definitions to help you select the appropriate physical and ownership terms. What you select for physical and ownership will impact subsequent fields in a transaction.

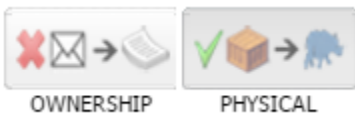
- Physical and Ownership – you have the animal physically at your institution and you also have legal ownership of it or you are transferring both the physical animal and the ownership to another.



- Ownership Only – the animal is not physically at your institution, but you have legal title to it or you are transferring only the legal title and not the animal.



- Physical Only – the animal is physically at your institution, but you do not have legal title to it or you are transferring the animal physically but not the legal ownership.



Animal Accession/Visit Modes

There are eight different modes of accessions to select from:

- From Another Institution – from another facility or individual. If it came from a ZIMS institution you would be creating a Visit and it should be in your Pending list. If not, you would be creating a new accession.
- Collected From Wild – your facility removed an animal/group directly from the wild to add to your collection. This is usually a new accession unless the animal was previously released by a ZIMS institution.
- Rescued – an orphaned or injured animal is removed from the wild. The final intent is usually to care for it and release it. This is usually a new accession unless the animal was previously released by a ZIMS institution.
- Appeared – an unplanned acquisition that simply appeared in your facility. This is a new accession unless the animal has an identifier that allows you to find it in the ZIMS database.
- Birth/Hatch – a birth or hatch at your facility or at a non-Species360 facility where you have ownership of the animal/group. This is always a new accession.
- From Lay – an egg/group of eggs/egg mass is laid. This is always a new accession.
- Fetus Identified – the presence of a fetus is determined. This is always a new accession.
- Undetermined/Indeterminate – if you select this you will be able to indicate if the Transaction Type is Undetermined (unknown at this time) or Indeterminate (unknown at this time and will never be known).

Animal Disposition Modes

For animals/groups that are no longer in your collection you will need to disposition them. To perform a disposition, go into the appropriate record and select My Transactions > Add Transactions > Dispositions.

There are six Disposition Types:

- Death – the animal is deceased.
- Merge Individuals/Groups Into a New Group – individuals or groups are merged into a new group.
- Merge This Animal/Group Into a Group – individual or group is merged into an existing group.
- Missing – the animal is gone from the collection. This is an unplanned disposition.
- Release to Wild – the animal is released to the wild.
- To Another Institution – the animal is sent to another facility.
- Undetermined/Indeterminate – the disposition Mode is unknown or may never be known.

Recording Parentage

Parentage is one of the most important pieces of information that you will record on your animals. Parentage highly impacts breeding recommendations and, if recorded incorrectly, can create a great negative impact on the reproductive health of a species.

There are six options to record the parents of your animals:

- Undetermined – you do not know the parent at this time, but you hope to in the future.
- Indeterminate – you will never know the parent.
- Wild – the parent is in the Wild and remains so. If it has been brought into captivity, then that information will be recorded in one of the following options.
- I Know the Parent is Not in ZIMS – the parent is not in the ZIMS database. Selecting this option will open a screen that allows you to enter what information you know about the animal.
- Add New Parent (the parent is in the ZIMS database)
 - Search by Identifier – you know the GAN or a Local ID that has been assigned by an Institution.
 - Search by Taxonomy – you know the taxonomy and the institution where it is located.

Estimating Dates

Dates are an important part of your animal record. Hopefully, most of these will be known dates but there may be times when you have to estimate a date and even times when a date may be completely unknown. The following date estimate options are available:

- Range – the date is between two known dates. Enter the first possible date and the last possible date. The date in the Date Field will pre-fill with the mid-date of the range. EXAMPLE: You went on vacation on 1 August and came back on 15 August. While you were gone a hyena was born. For the Birth Date enter 1 August for the Start Date and 15 August for the End Date. The application will calculate the Date Field for you.
- Variance – the date is sometime around a date. EXAMPLE: You see a fledgling bird for the first time. Fledge time is two weeks for the species. For the Birth Date enter two weeks before the fledge date in the Date Field and 2 days into the Variance field.
- ApproxBefore – the date is sometime before the date entered into the Date Field. EXAMPLE: You have a Galapagos tortoise that was recorded in the 1

January 1910 inventory. For the Acquisition Date record 1 January 1910 in the Date Field and select ApproxBefore as the estimate.

- ApproxAfter - the date is sometime after the date entered into the Date Field. EXAMPLE: the last inventory that included the Galapagos tortoise above was the 1 January 2011 inventory. For the Disposition Date enter 1 January 2011 into the Date Field and select ApproxAfter as the estimate.
- Undetermined - you have no idea what the date is at this time. You will need to enter a date in the Date Field for sorting purposes.
- Indeterminate - you have no idea what the date is and will never know. You will need to enter a date in the Date Field for sorting purposes.

HINT: If you come across a field that you do not know the information for right now, but you may (such as Parents, Rearing or an Enclosure) select Undetermined. Then record a Note using a Note Type of General or Transactions. Use a Keyword of “Data Needed” or something similar and record the grid where the data is needed in the note text. You can then do a Note Retrieval for all of the records with “Data Needed” in specific grids.

Some Group Information

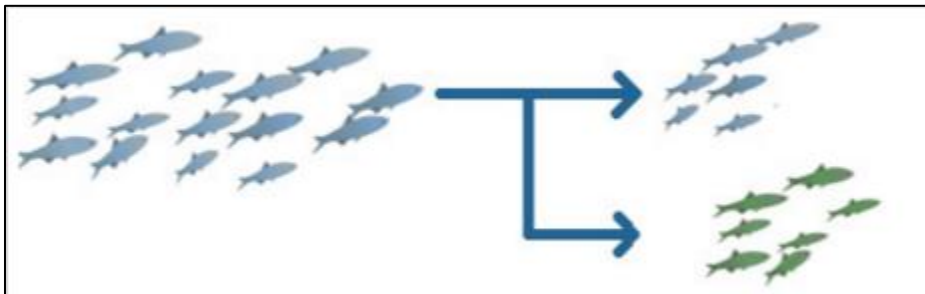
There are four ways that you can track your group counts. This tracking can be set as an Institution Preference to save you time:

- No tracking - recording simple total number (census) in the group
- Sex Type - recording the number of each sex in the group
- Life Stage - recording the number of each life stage in the group
- Sex Type and Life Stage - recording the number of each sex in each life stage

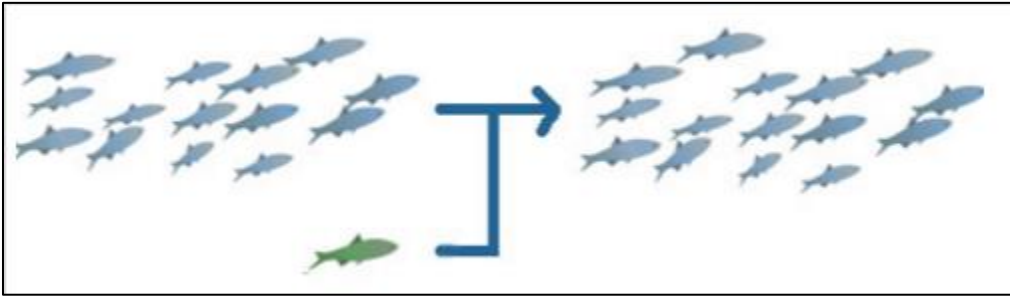
Whenever you record a group census (actually count or estimate the numbers in the group) this count will be a “reset”. Any members coming into or going out of the group will be added or subtracted from this count until you record another census.

There are some terms that are specific to group records:

- Split - you are taking members out of a group



- Merge - you are adding members to a group



- Full Transaction - what is happening to the group is happening to all members of the group.
- Partial Transaction - what is happening to the group is impacting only some members of the group.
- Close Out - the group is no longer active, and you can no longer perform any actions on it.

For some Best Practices for Accessions go to [Best Practices for Accessions in ZIMS](#)

For more details on accessions go to [Animals - Accessions](#)

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11. Pending Transactions

Now you can start entering animals! As mentioned, the best place to start entering your animals is to address your Pending transactions. Pending transactions are found under Animals>Animal Statistics. By My Institution means that it is your responsibility to take an action. These are animals that another ZIMS institution has recorded as sending to you or receiving from you. These animals are already in the database so you will be creating Visits for them. By Other Institution is the responsibility of another institution to take action on.

Pending Transactions are organized by date of the transaction:

- Last 30 days
- Last 180 days
- Last 1 year
- Older than a year

It is recommended that you start with the Older Than a Year transactions with you as the Receiver. These older transactions may help you get some parental animals recorded and the more recent ones may be impacted by earlier transactions. To take action on these Pending select the hyperlink to display a list of all Pending that were created for transactions over a year ago.

HINT: To find all the transactions with you as the Receiver sort the Receiver column either Ascending or Descending as desired. This will group all of your acquisitions together. If you want to see fewer, or more, columns select the down arrow to the right of any column and select Columns. Check and uncheck columns you want to see or remove.

Select the GAN hyperlink to open the My Transactions stream in the record. The highlighted yellow line indicates a Pending. If you do not want to see the additional Pending warning box check the Do Not Show This Warning Again box. The wheel icon on the far right will display your options.

- Confirm selected - you agree that you received or sent the animal. Selecting this will open a screen for you to enter your information. Once Confirmed, the transaction will be removed from the pending list for both you and the sending/receiving institution and the animal will be added to your collection.
- Deny selected - you do not agree that you received or sent the animal. This action will send the transaction back to the sending/receiving institution. It

will be removed from your By My Institution tab and moved to the By Other Institution tab as it is now their responsibility to take an action.

- No information available – you may have received or sent the animal, but you have no information proving that you did. The transaction will be removed from your By My Institution tab. The sending/receiving institution will be notified that you have no information available via a Post Office message.
- Not recorded in ZIMS – you agree that the transaction took place, but you will not be recording the animal into ZIMS. This often happens with corals and invertebrates where one facility will enter them into ZIMS and the other will not. The transaction will be removed from your By My Institution tab. The sending/receiving institution will be notified that you have not/will not be recording the information via a Post Office message.
- Delete – although it displays as an action for Pending, you cannot delete a record that was recorded by another institution, so Delete is not an option.

If you feel that you cannot address the Pending at this time you can select to Archive it by checking the left hand box in the Pending grid and selecting Archive Selected above the list. You can include any archived records in the list by checking the Include Archived Records checkbox when you wish to address them.

HINT: Pending Transactions can get confusing, especially if there is more than one Pending transaction in a single record. Contact support@Species360.org at the first sign of puzzlement! They get easier after you have done a few.

ANOTHER HINT: If a group record was sent to you but you want to record them as individuals at your institution you must accept the group record first and then split out the members as individuals. If animals were sent to you as individuals but you want to manage them as a group accept the individual records first and merge them together later.

For help with Pending Transactions go to [Pending Transactions](#)

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12. Animals in the Database Without Pending

There may be animals that do not have Pending Transactions associated with them but are still already recorded in the ZIMS database that you need to add to your collection. This can happen if you receive an animal from a non-Species360 member that was previously held at a member institution. You will need to find these animals (become a detective) and create a Visit for them.

To create a Visit for it at your facility you have two options.

Option 1 – from a Global search

- If you know the animal GAN do a search by it. Remember the search under the Start menu is for Local animals only. To do a Global search by GAN use the search box in the upper left-hand corner. OR.....
- Do a Global Animal Simple Search by Institution and Taxonomy (and Local ID if you have it!) OR....
- Do a Global Animal Advanced Search by other Identifiers or any of the other filters available in Advanced Animal search.
- If a match(es) is found, open the record and confirm that you have the correct animal by reviewing the record.
- Go to My Transactions > Add Transaction > From Another Institution and complete your institution information.

Option 2 – from Accession Screen

- You will need the GAN or Local ID of the individual/group from the Species360 member. Hopefully, this is on your paperwork for the animal. If not, you will need to contact the Sending Institution.
- Go to Start > Accession > Individual or Group > From Another Institution
- Enter the member institution and the GAN or their Local ID. If the searching polar bear finds a match(es) it will display in a results grid. If the animal is not found, you must assume it is not in the database. See [New Accessions](#) below.
- If a match is found, check the box to the left of the correct animal and select Yes, Go with selected animal.
- Complete the accession screen using the non-member sending information.

HINT: Any documentation that you have on your animals will be helpful here, especially if where the non-member Sender got the animal from is noted. Creating duplicate records should be avoided if possible. If duplicates are created you will need to contact your Member Support representative to Merge them.

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13. New Accessions

Individuals/Groups that are not already in the database will be for the following transaction types:

- Animals received from non-Species360 members that have never been held at a member facility.
- Births/Hatches at your institution.
- Collected From Wild (unless a Species360 member previously released it).
- Appeared.
- Rescued.
- Undetermined/Indeterminate (you have no idea how the animal got into your Collection)

For these transactions you will be performing the initial accession into the ZIMS database. To create these records:

- Go to Start > Accession > select entity > select Transaction Type.
- Complete the screen.

There are six different entities to select from:

- Individual Animal - a single, identifiable animal.
- Group of Animals - a number of animals that cannot be individually identified, usually of the same species.
- Egg - an internal or external egg.
- Egg Mass - a large number of eggs, number is difficult to accurately count. An Egg Mass is often held together in a gelatinous substance or laid in a substrate.
- Fetus - a developing vertebrate within a female.
- Group of Eggs - a number of eggs that you do not individually identify.

HINT: When you Save the Accession you have the option to go into the record either by selecting View Details or the GAN hyperlink. It is recommended that you open the record and view what you recorded to catch any data entry errors right away.

When you are creating new accessions there are two options to save you time – Batch Accession and Save & Repeat:

- Batch Accession: when the information will be **identical** for multiple animals. Check the box before starting the Accession. If you have selected to auto-increment your Local IDs (highly recommended, see [Institution Preferences](#)) select the number of Local IDs you will need and then select the Generate button. The IDs will prefill. Otherwise, you will need to manually type in the Local IDs. Remember to press Enter or Comma after the last Local ID entered or your number of records will be one shy. Complete the screen and Save.
- Save & Repeat: when the information will be **similar** for multiple animals. Complete the screen for your first animal. Select Save & Repeat instead of Save. The screen will remain open to make any changes for your second animal. If you have selected to auto-increment Local IDs the next ID will prefill. Otherwise, remember to add the new Local ID or you cannot Save.

Another time saver is Take a Copy From This Animal. This option creates a duplicate Accession screen from a record you have already entered. To Take a Copy, open the record > Actions > Take a Copy From This Animal. The Accession information for the record appears but all fields are editable.

HINT: Save time (and increased chances for data entry errors due to repeat entries) whenever you can by using Batch Accession or Save & Repeat as appropriate. And don't forget you can Take a Copy!

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14. Creating Life Supports and Components

Life Supports help maintain the health of our animals by controlling their environmental surroundings. Aquatic enclosures depend highly on their life supports but they can also be used on terrestrial enclosures. You can create a simple life support and attach it to one or more enclosures. Or, you can create a more complex one by recording and attaching the components that make up the life support.

HINT: Life supports can be attached to multiple enclosures. Components can be attached only to one life support.

You can create the components first and then the life support, then attach the components to it. Or, you can create the life support first and then create components which are then attached to it. The Add New Component screen has a field for Attached Life Support, so creating the life support first can save you a step as you can attach them to the life support right from the Add New Component screen.

To create a new life support, select the Life Support desktop icon > Actions > Add New Life Support or go to Start > Life Supports > Actions > Add New Life Support.

- Life Support Group (mandatory) – select if it is Aquatic, Terrestrial or Incubation. What you select here will impact what components you can attach to it and what Enclosures you can attach it to.
- Life Support Status (mandatory) – select Operational, Shutdown or Retired.
- Life Support Name (mandatory) – must be unique. You may want to discuss naming conventions with your Staff before you start.
- Responsible Party (optional) – sourced from your Staff list.
- Life Support Identifier (optional) – usually a shortened version of the Name.

To create a new component, follow the same flow but select Add New Component.

- Component Name (mandatory) – must be unique. You may want to discuss naming conventions with your Staff before you start.
- Component ID (optional) – usually a shortened version of the Name.
- Component Type (mandatory) – this is a multiple select data standard. You can select at a high level such as Aquatic, Incubation or Terrestrial or drill down the list to a specific component such as a Cyclone Filter.
- Manufacturer/Vendor (optional) – useful should you want to reorder.
- Serial Number (optional) – useful to determine exactly which component you are referencing should you have many of the same type.
- Manufacturer URL (optional) – useful if you have questions or want to reorder.

- Storage Location (optional) - where the component is stored if it is not attached to a life support.
- Attached Life Support (optional) - this is where you can save a step and attach it directly to the appropriate life support.
- Connection Type (mandatory) - select Permanent or Temporary

To attach a Component to a Life Support, open the Life Support record > Connected Component List. You can attach a Life Support to an Enclosure(s) from within the Life Support record (Connected Enclosure List grid) or the Enclosure record (Attached Life Supports).

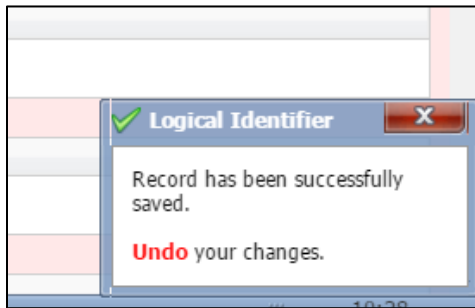
For help with creating Life Supports and Components go to Managing Enclosures, Life Supports and Components section in the [Aquatics Index](#) .

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15. Correcting Mistakes

Mistakes are made. ZIMS has several options to help you correct them.

After saving most data entry screens you have a short time to Undo your entry. Selecting Undo will cause the record to not be saved. Undo is useful when you realize immediately that you made a mistake. Often Undo is used when you are in the incorrect record.



Data Entry Monitoring allows you to Roll Back (remove) any records that have been added by you or others. Go to Start > Security Tools > Data Entry Monitoring. Data Entry Monitoring is especially helpful when you have Staff members in training for data entry. You can review their entries and Roll them back if required. The Transaction Count is a hyperlink to a list of the records that were added/edited or removed. Simply highlight the record and select Undo Selected. The date and the person who Rolled Back the data entry will display in the list.

HINT: Be very careful when opting to Undo Selected (Roll Back) an item using Data Entry Monitoring, you cannot Undo a Rolled Back entry.

Any data that was entered by your institution can be edited or deleted if you have the Role access. It is often recommended that you add a Note as to why you edited the data.

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16. Glossary of ZIMS Application Terms

ACTIVE: The information is relevant at the time, usually indicated by a checkbox.

ALERT: A calendar communication that provides a reminder, a notification, or a warning for today or a future date or date range for an Animal Entity. Priority can be High, Medium or Low depending on the requirement of the Alert.

ANIMAL TYPE: There are six kinds of Animal Types. Each Type will be assigned one Global Accession Number (GAN).

1. Individual Animal - a single animal that can be identified individually
2. Group of Animals - a number of animals that cannot be identified individually
3. Egg - a single egg that can be identified individually
4. Group of eggs - a number of eggs that cannot be identified individually, numbers can be counted
5. Egg Mass - a number of eggs that cannot be identified individually, numbers cannot be counted, often bonded together until hatch
6. Fetus - a developing mammal after the embryonic stage and before birth.

APPLY TO ALL ENCLOSURE OCCUPANTS/INCLUDE IN ANIMAL RECORD: Allows information entered into an Enclosure record to also be added to the record of all animal entities that were in the enclosure on that date.

APPROXAFTER: A date is sometime after the date that is recorded in the date field. Used for estimating a date when the actual date is not known.

APPROXBEOFRE: A date is sometime before the date that is recorded in the date field. Used for estimating a date when the actual date is not known.

APPROXVARIANCE: A date could have been sometime before and after the date entered into the date field. You can enter a variance of days, weeks, months or years.

AQUATIC: Refers to a Category for Enclosures or Life Support. An aquatic enclosure contains only water and no land or terrestrial features.

ASSIGN TRANSPONDER: Reserving a transponder for a specific animal entity so that it can be inserted at a later date. Most common use is for permit application when a transponder must be identified but may not actually be inserted. This transponder will not be available to insert into any other animal entity.

AUTO-INCREMENT LOCAL ID: This function is available as an Institution Preference and allows the next Local ID to automatically fill into the Local ID field.

AVAILABLE ANIMAL: An animal entity (individual, group of animals, egg, etc.) at your institution is available for placement elsewhere. Other institutions can search to find what animals you have listed as available.

BARRIER: An object or structure that keeps the occupants within the enclosure or tank and keeps guests and visitors out of where you don't want them. Examples of barriers are fences and moats for hoof stock, wire mesh for aviaries and glass walls for aquariums.

BASIC DETAIL: A field displaying the basic information that was entered on an animal entity, an enclosure, a life support, an institution, etc. The values are generally sourced from data entered during initial entry such as the accessioning screens for an animal entity and the Enclosure Add screen for an enclosure. Most of the Basic Detail can be edited from that screen. Some topics are edited from other fields.

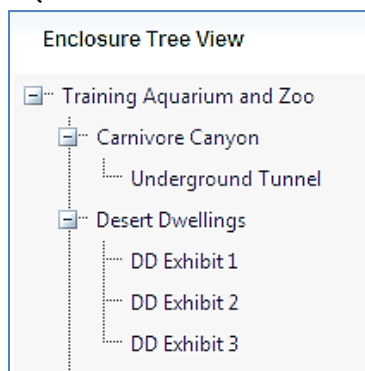
BATCH: Performing the same action on multiple animal entities at the same time. Topics where Batch is available are observation, notes and attachments, weight and length information, training information and alerts.

BUSINESS RULE: Complex decision logic to ensure that something illogical is not done. They also drive warning boxes when you are trying to do something that may be interpreted as creating a data entry error. Business Rules were developed by the computer programmers to ensure proper technical functioning and by Subject Matter Experts with specific fields of knowledge to ensure proper animal and institutional functioning. An example of an animal entity related Business Rule is "You cannot release an animal to the wild that has already been dispositioned as a death." You cannot break a Business Rule.

BY CATCH: Animals captured from the wild that were not your original intent to capture but you have decided to keep them and add to your institutional collection.

CHARACTERISTICS: Distinguishing traits or qualities of a species that help define it. Traits included are Scientific Name, Natural State, Collective Noun, Range Description and Habitat.

CHILD ENCLOSURE: In the Enclosure Tree, an enclosure that is tiered under another enclosure. In the following example Carnivore Canyon is a Child Enclosure to Training Aquarium and Zoo; Underground Tunnel is a Child Enclosure to Carnivore Canyon.



CLOSE OUT: Used to make groups inactive. Usually used when the count gets to 0.0.0, but groups can be marked as Closed Out even if members remain in the census count. You cannot perform any actions on groups that are marked as Closed Out and they will no longer appear in reports during a time frame when they were marked as Closed Out. Usually used for historical entries on groups migrated from the legacy ARKS program.

COLLECTION: Different sets of related animals that are associated as a group. Usually your primary reason for having an animal or group at your institution. ZIMS has 15 different types of Collections. Commonly used Collections are Main Collection (your exhibit and breeding animals), Education (animals used for educational programs) and Research (animals held specifically for research projects).

COLONY: A large number of animals that live together in close association and often act with mutual purpose. Numbers may be estimated but are difficult to actually count. Inventory counts are usually “1”.

COMPONENT: A self-contained part of a Life Support, usually a manufactured object. Some examples of components are pumps, filters and ozone generators.

COMPONENT INVENTORY: A list of the components and details about them such as the Manufacturer, serial number, storage location and if they are attached to a Life Support.

CONTRACEPTION: A method to prevent or limit reproduction. The methods may be through management (separating the sexes), hormonal administration (oral contraceptives or implants), immunological injection (PZP or Improvest® vaccines) or surgical (vasectomy, castration, hysterectomy, tubal ligation).

CURRENT (global): Includes all animals currently owned or held by Species360 members, or those in transit between Species360 members.

CURRENT (local): Includes all animals that your institution has reported you currently own or hold.

DATA STANDARD: A prefilled, system generated list that allows the User to make a selection. The terms in the list were developed by Subject Matter Experts and they help eliminate data errors caused by free text entries. Data standard lists are often filtered by what you have in focus or by what you selected in a previous field on the screen. For example, during an accession the Terms Data Standard is filtered by what you chose as the Source, so a Term of Purchase would not be in the list if you selected a Source of Collected from Wild. Most Data Standards allow a single selection from the list although a few allow multiple selections to be made.

DEPARTMENT: How Departments are defined is up to your institutional desires. Currently you can assign a department name and a department head. When you are creating ZIMS Staff you can assign them to a department and then search for department members. Functionality will increase in Release 4 when Plans, Protocols, Tasks and Requests become active.

DEVELOPMENT MILESTONE: An accomplishment made while growing older. For a bird an example of milestones would be the development of down, color change of eyes and the development of spurs. For a mammal example of milestones could be eyes and ears opening, eating solid food for the first time and the development of horns or antlers.

EFFECTIVE DATE: The date that the current status of a permit became effective. For example, if you submit a permit on 4 June 2010 then the Effective Date would be 4 June 2010. If additional information is requested on 10 August 2010 then you would update the status to reflect this and the Effective Date would be 10 August 2010.

ENCLOSURE: Where an animal entity is held in your institution. How detailed you define your enclosures is up to your institutional desires, some institutions only record the major areas of their facility and others will assign Enclosure Names to small cages, tanks and even sky kennels.

ENCLOSURE IDENTIFIER: Usually a shortened version of the Enclosure Name, Enclosure Identifier is often used in-house to refer to enclosures. For example, the

Enclosure Name may be West African Plains Hoofstock Exhibit, but the Enclosure Identifier would be just the initials of WAPHE.

ENCLOSURE LOCATION: A free text field for where an enclosure is located within your institution. The location for a hoofstock exhibit could be Northeast Corner and the location for an aquarium could be Opposite Entry Door.

ENCLOSURE NAME: How an enclosure is referenced. The Enclosure Name often provides some information about the enclosure but it is recommended not to use species as the Enclosure Name, such as Babirusa Barn, because over time the species held in the enclosure may change and you might now hold ocelots in your Babirusa Barn.

ENCLOSURE TREE: Arranging your enclosures and tanks into a hierarchical tree by using Parent Enclosures and Child Enclosures. The number of branches in the tree is unlimited.

ENVIRONMENTAL MEASUREMENTS: Measurements taken on a terrestrial enclosure.

ESTABLISH DATE: Used for group accessions. It is the date when the group was initially formed. For a group that is collected from the wild it would be the collection or accession date, whichever you prefer. For a group that is received from another institution it would be the date that the group was originally formed at the other institution.

ESTABLISH TYPE: For group accessions it is whether the group was initially formed in the Wild or in Captivity.

FEED LOG: Keeps record of what food was fed, what amount was fed, what amount was consumed and what amount was left over. Feeding Logs can be recorded for both animal entities and enclosures.

FORCE SINGLE SESSION: The User can be signed into ZIMS on only one computer at a time.

FULL (Acquisition or Disposition): The transaction has happened to the entire group. This is usually the initial acquisition and final disposition of a group.

FURNITURE: Anything other than plants that is put into an enclosure or tank. Furniture can be items that assist with routine care such as hayracks and feed

troughs, items used by the enclosure inhabitants to encourage natural behaviors such as ropes and fake caves, or simply something that makes the enclosure more natural looking.

GENETIC TRAITS: The known or relevant to husbandry traits for a specific taxon that are genetically driven. For example, golden-lion tamarins have a tendency to exhibit diaphragmatic hernias and some species often carry genes for albinism.

GLOBAL VIEW: A view of a record that does not include institutionally specific information such as collection, enclosure and responsible party. If you have never physically had the animal or legally owned it, this is the only view of it that you can see.

GLOBAL ACCESSION NUMBER (GAN): The one-time number that is assigned by the program when you have completed a successful accession of an animal entity. This number does not change as the animal moves from one institution to another and keeps the single global record intact.

GLOBAL ADMINISTRATOR: Species360 staff member who adds the member institutions and keeps the taxonomic information up-to-date.

GROUP: A number of animals or eggs, usually of the same species, that cannot be distinguished individually or that you have chosen to management as a single unit. A group receives a single GAN. The numbers in Groups can usually be actually counted or fairly accurately estimated and the actual count of the group is shown in the inventory.

GROUP DEATH: The entire Group has died on the same day.

GROUP TRANSACTIONS: Actions that can be performed on a group such as Merging and Splitting.

HAZARDS: Information about how hazardous the taxon could be to humans including threat level and type of hazard.

HOLDING INSTITUTION (HOLDER): The facility that physically has the animal and is responsible for its care. Holding Institutions have edit rights for most screens relevant to the animal. This facility may or may not own the animal legally.

INACTIVE: The record is not relevant at the time. The best example is marking a staff member Inactive if they go on leave for a year. If they are marked as Inactive (ie the Active checkbox is unchecked) they will not have access to ZIMS.

INCLUDE IN ACTIVITY REPORT: Checking this box means that you want the information entered on the screen to be included in an Activity Report when one is generated for the date range that includes the date recorded on the screen.

INCLUDE TAXON BELOW: The taxonomy in ZIMS is arranged in a tiered hierarchy with Sub-species placed underneath Species, and Species placed underneath Genus. If you wanted to find all members of the Family Spheniscidae, you would enter that as the taxonomy and select Include Taxon Below. If you wanted to find only what Species are found in the Genus Spheniscus then you would enter that as the taxonomy and select Include Taxon Below. If this is not checked then you will find animals only at the level selected.

INCOMPLETE ACCESSION: A bare bones accession that is created so that data can be recorded in a record prior to being fully Accessioned. These Accessions do not show up in reports (except the Notes will display in the Activity and the Daily Report) but they can be searched for. Incomplete Accessions cannot be dispositioned until they are fully Accessioned.

INCOMPLETE DISPOSITION: This is created when a necropsy is recorded in the Medical module prior to the death being recorded in the Husbandry module.

INDETERMINATE: The value in the field will never be known. Serious efforts have been made to find this information but it could not be found.

INDIVIDUAL (ANIMAL): A single animal that can be distinguished from others.

LEGAL NAME: The name that an institution legally operates under. May be different than the name that it is commonly referred to.

LIFE SUPPORT: Life Support is used to sustain life or to improve the quality of life by providing for the needs of the animals. Generally related to an indoor enclosure/tank or exhibit and most often used in aquatic enclosures. Life Supports are comprised of various components and can be attached to one or more enclosures or tanks.

LIFE SUPPORT TREE: Displays the active life supports, the components that are attached to them and the enclosures that the life support is attached to in a tiered hierarchical view.

LIFE STAGE: The various stages of life that an animal passes through as it ages. For example, some of the Life Stages of a bird could be egg, hatchling, juvenile and adult.

LIMIT ACCESS BY IP NUMBER: A User can sign into ZIMS only from recorded IP addresses.

LOCAL VIEW: The information that you can see for animals that have physically been at your institution or at a non-Species360 member institution but you had ownership of them. Local View includes institutionally specific information such as collection, enclosure and responsible party.

LOCAL ADMINISTRATOR: The person that has the responsibility of managing ZIMS at your institution. They can add ZIMS Users and Staff, create ZIMS Roles, add locally used institutions and keep the address and contact information up-to-date.

LOCAL ID: A number assigned to an animal entity at the institutional level. ZIMS requires that this number be unique within your institution. Local Accession numbers had previously been required to help link the animals in the global database.

MERGE ENCLOSURE (ACTUAL PHYSICAL MERGE): Enclosures are Merged when two, usually smaller, enclosures become one, usually larger enclosure. An example for a terrestrial enclosure would be removing a fence between two pens to create one large pen. An example for an aquatic enclosure would be removing a divider between two tanks to create one large tank. You can chose to retain the enclosure name of one of the source enclosures and the other source enclosure will be marked as Removed. Or you can create a new enclosure name for the merged enclosure.

MERGE ENCLOSURE (CLEANUP ERRORS): Enclosures are Merged for Data Quality Reasons when one of the enclosures is incorrect. For example, Quarantine 01 is actually the same enclosure as Quarantine Room 1. Quarantine 01 needs to be merged into Quarantine Room 1 to correct the mistake. Records for all the animals recorded as being in Quarantine 01 will be corrected to Quarantine Room.

MERGE GROUPS: Groups are merged when two separate groups are put together to form one group. You can chose to retain the GAN of one of the source groups and the other group will be marked as Closed Out. Or you can create a new GAN for the newly formed group.

MNEMONIC: A unique shortened form of an institution's name that is assigned by the Global Administrator when they enter the institution into the database. Species360 mnemonics are up to nine digits and are often easier to remember than the complete institutional name.

MODULE BOX PREFERENCES: Available as both an Institution Preference and an Individual Preference, this allows the grids to open as expanded when the User opens a record.

MOVEABLE ENCLOSURE: An enclosure or tank that is small enough to be picked up and fairly easily moved from one location to another, or one that has been manufactured or modified so that it can be moved such as being on wheels.

MY TRANSACTIONS: Displays all the transactions for an animal/group that involve your institution. Starting screen for additional transactions involving the animal/group.

NOTES: Free text data entry for gathering additional information or recording details that are not available in other fields or screens.

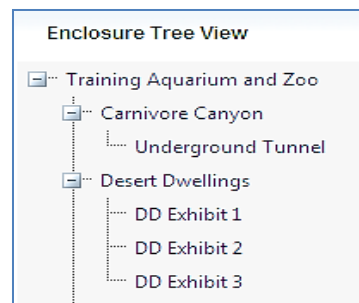
OBSERVATION: Recording an event that has been observed over time. The Observation screen gathers more information than is recorded for a simple Note. The location of the Observation, the time of day and the duration, who observed the event and the quality of the observation are collected along with the free text details regarding the Observation.

OWNERSHIP TRANSACTION HISTORY: A global view of all the institutions who have had legal title to the animal/group.

OWNING INSTITUTION (OWNER): The facility that has legal ownership of the animal entity. If the Owing Institution is not also the Holding Institution, then the only edit rights they have is ownership.

PAGINATION SIZE: The number of lines that appear in results grids. Relevant screens:
All results grids

PARENT ENCLOSURE: In the Enclosure Tree, an enclosure that is above another enclosure in the tiered hierarchy. In the following example Training Aquarium and Zoo is a Parent enclosure to Carnivore Canyon and Desert Dwelling. Carnivore Canyon is a Parent Enclosure to Underground Tunnel and Desert Dwellings is a Parent Enclosure to all of the DD Exhibits.



PARTIAL (Acquisition or Disposition): The transaction is happening to only some members of the group. This includes splitting a group, acquiring more members of a group, dispositioning some members of a group.

PENDING TRANSACTIONS: A list of transactions between your facility and other ISIS member facilities that have not yet been confirmed by both sides. The By My Institution tab means that you need to take actions, such as accepting an animal that was sent to you. The By Other Institutions tab means that another facility needs to take action, such as confirming that they received an animal that you sent to them.

PERMIT: An authoritative or official certificate of permission, a license to do something. Permits can be local, regional or global in scope.

PERMIT NAME: A unique word or phrase that identifies a permit and allows for searching by it. How permits are named is by the preference of the institution.

PHYSICAL HOLDER HISTORY: A global view of all the institutions where the animal/group has been physically held.

PLANNED TAXA: A record of your institution's future plans for species in an enclosure, including the desired sexes and the target year for the species to be in the enclosure.

PREFERENCES: Sets defaults for some fields and affects functionality of the application. Allows Users to customize the ZIMS application to meet their needs. Not all preferences are available as Institution and Individual Preferences. Individual Preferences will over-ride Institution Preferences.

PREFERRED: Used to indicate which identifier, common name synonym or taxonomic name synonym that you favor. Your preferred common and scientific names will be displayed in the Basic Detail and on reports for local view.

PROVISIONAL: This type of data must be reviewed and accepted before it becomes part of the animal's record. There are limited reports where you can select to include Provisional Data such as Activity Report and Daily Report.

RANGE: Used for estimating a date if you knew the date was sometime between two specific dates. For an estimated date Range, you record the first possible date (From date) and the last possible date (To date). The program will automatically calculate the midpoint and will fill it into the date field.

REQUIRED: The field must be completed before you can save the record and move on. Required fields are marked by a red asterisk. If the User tries to save and a Required field is not completed, the field border becomes highlighted in red. You cannot successfully save a screen until all Required fields have been completed.

RESPONSIBLE PARTY: The staff member, Team or Department that has primary accountability for the animal, enclosure or life support.

ROLE: The function or position someone is filling at your facility as it is related to ZIMS. Various Roles are assigned different access to view or edit ZIMS screens. ZIMS deploys with a list of Species360 template Roles that are not editable. When new functionality is deployed, Species 360 will update these Roles as we deem appropriate. When creating custom Roles you can select from these templates and edit as you wish, or start without a template and create the Role access as desired. Custom Roles are not updated when new functionality is released.

ROLE TRIMMING: The screens that are visible when a User is signed into ZIMS depend on what Role they are assigned and only those screens that are allowed for viewing or editing for that assigned Role are visible.

SEARCH SCOPE: The depth or reach of the search you want to do. A Local search Scope looks only in records for animals that you have had physically at your facility or had legal ownership of, or both. A Global search Scope looks at all the records in the worldwide database.

SHORT NAME (ENGLISH): An often-abbreviated English name of an institution that is entered by the Local Administrator.

SHORT NAME (LOCAL): An institution's name that is used locally. Can be added and edited by Local Administrator.

SOURCE: The way you acquired the animal entity. ZIMS has six types of Source: Another Institution, Collected from Wild, Rescued, Appeared, Birth Hatch Conception and From Lay. What is available for the Terms is driven by the Source that is selected.

SPECIES HOLDING: Shows a listing of institutions that currently hold a specific taxon and the number of males, females, and unknown sex of those animals.

SPECIES WANTED: Taxon that your institution wants to acquire. Can be found under both Institution Information and Taxonomy.

SPLIT: To separate or divide one group into two groups or remove an individual from a group. You will retain part of the group under the original GAN and create a new group or individual with a new GAN.

SUBSTRATE: What your terrestrial animals walk or fly over and what is at the bottom of your aquarium tanks. Examples are gravel or charcoal in the bottom of your aquarium, concrete or fake grass in your aviary, corncob or shaving for your reptiles and real grass or rubber matting for your hoofstock.

SYNONYM: A different word or phrase that refers to an institution or a taxonomy. For a taxonomic synonym you can indicate if it is your preferred synonym for the common or scientific name.

SYSTEM GENERATED: A list that cannot be edited locally such as Actions Dropdowns and Data Standards. Also includes details that are entered on specific topic screens (such as permit details) that appear under the Notes and Attachments tab.

TAXONOMY CHANGE: A species is designated with a new Genus or Species name that is different than the one in the ZIMS Taxonomic List. The Global Administrator will make the change in the Taxonomic List when there is documented scientific evidence for the change.

TEAM: How you define your Teams is your institutional preference. There are six team types that are system generated. How you name your Teams is also institutional preference. Staff members can be assigned to Teams, and Teams can be responsible parties for animals, enclosures and life support.

TERMS: The conditions by which an animal entity is accessioned or dispositioned. The Terms are driven by the Source selected for receiving an animal entity. Indicating the physical location and ownership of the animal are included in Terms.

TERRESTRIAL: An enclosure that contains only land, or one that contains land and water features. Often the occupants can go back and forth between the land and the water.

TRACKING: How detailed you follow the make-up of your group. You can Track by sex type, life stage, both or have no tracking beyond a census count.

TRAINING EVENT: Recording a single training event that is part of the behavior/routine defined in Training Information.

TRAINING INFORMATION: Defining the behavior/routine that is being trained, the purpose of the training, and updating the status of the training.

TRANSPONDER INVENTORY: A list of your transponders and their status such as assigned, available and in-use. All transponders must be recorded in the Transponder Inventory before they can be assigned or inserted into an animal. The only exception is those transponders that were in animals that were migrated into the system from ARKS4 data.

UNDETERMINED: The value of this field is not known at this time.

USER: Someone who is assigned a Role in ZIMS. You cannot use ZIMS unless you have been assigned a role as a User.

VARIANCE: See ApproxVariance

WALKTHROUGH: An enclosure that allows visitors to walk into the enclosure and be in close contact with the occupants. Common in many aviaries and kangaroo/wallaby exhibits.

WATER BODIES: Water features in a terrestrial enclosure. You cannot take water quality measurements on a Water Body.

WATER QUALITY MEASUREMENTS: Measurements taken on the water in an aquatic enclosure.

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If you run into any problems, please contact your Member Support person at support@Species360.org. If you are having any confusion or issues at all do not delay with notifying them. They are there to help you.

We hope this document helped you get started using the ZIMS application. Any comments, edits and suggestions to improve this document are welcome. Please send to amiller@Species360.org or training@Species360.org.

Happy ZIMSing!