GLOBAL DATA AND EXTERNAL SHARING IN ZIMS

Much of the animal data in ZIMS is shared globally by default. In addition, you can choose to share additional information for a single animal record or for a complete taxonomy with another institution via External Sharing.

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Topics Covered

1.What data is shared globally by default

If you are looking at a local record (an animal/group your institution has either physically held or had ownership of) the background is pink. If you are looking at a global record (an animal/group your institution has never physically held or owned) the background is blue. The following data is shared globally by default:

- Details Tab
    - Basic Information (Entity, GAN, Status, Sex, Local IDs, Species, IUCN & CITES Status, Birth Location, Birth Type, Birth Date, Age, Last Reported Holder, Last Reported Owner
    - Physical Holder History (all the physical transfers and their terms)
    - Ownership Transaction History (all the ownership transfers and their terms)
    - Measurements (weights and lengths) (with associated Notes)
    - Contraception (with associated Notes)
    - Identifiers (with associated Notes)
    - Parent Information

- o Rearing (with associated Notes)
- o Taxonomy / Sex Type (with associated Notes)
- o Census (for group records)
- o Images (if marked as Visible to all Species360)
- More Details Tab
  - o Development Milestones (with associated Notes)
  - o Event Location
  - o Permits
  - o Life Stages (with associated Notes)
  - o Management Plan (with associated Notes)
- Note & Observation Tab (NOTE: obsolete means the note sub-type cannot be selected anymore but if it has been used historically it will display)
  - o Animal Care
    - ▪ Color Change
    - ▪ Measurement Comments (sourced from Weights/Lengths)
    - ▪ Weight/Length (obsolete)
  - o Animal Information
    - ▪ Age Estimate
    - ▪ Color Phase (obsolete)
    - ▪ Freezebrand (obsolete)
    - ▪ Identification (obsolete)
    - ▪ Identifier Detail
    - ▪ Reason for Taxonomic Change
    - ▪ Taxon per Recipient
    - ▪ Taxon per Vendor
    - ▪ Wild Source Information
  - o Communication
    - ▪ Color Pattern
  - o Development
    - ▪ Fledge Date
    - ▪ Growth Stage (obsolete)
  - o General
    - ▪ Change Log (obsolete)
    - ▪ Group History
    - ▪ Animal Copy (Species360 generated Note)
    - ▪ Merge Two Animals (Species360 generated Note)
    - ▪ Split One Animal Into Two (Species360 generated Note)
  - o Management

- Group Census Detail
  - o Relationships
    - Dam/Sire ID Elsewhere (obsolete)
    - Genetic Information
    - Litter/Clutch
    - Egg Lay
  - o Sex Information
    - Sexing Information
    - Sex Modification Log
  - o Transactions
    - Accession From Group (obsolete)
    - Broker (obsolete)
    - Delivery (obsolete)
    - Shipper (obsolete)
- Major Life Event

When you acquire the animal physically or get legal title to it, the above listed information entered by another institution is what you will be able to view in the record, holding or owning the animal does not increase the data you will see that was recorded by another institution. If you need to see more information you will need to ask for the record to be Externally Shared with you.

Back to Topics Covered

2.What data is shared when External Sharing is used – Husbandry

You can select to share only the Husbandry records, only the Medical records or both. Only the sharing institution has to have Husbandry External Sharing turned on for the other institution who they are sharing with to view the data. The background in a shared record is white unless you acquire the animal and then it will be pink.

What displays in an Externally Shared Husbandry record:
- All that is shown globally (see above)
- More Details Tab
  - o Training Information
  - o Feed Logs
  - o Enrichment
- Notes & Observations Tab
  - o All are displayed

What is not displayed is institution specific information such as:
- Enclosure
- Collection
- Responsible Party
- Alerts

Back to Topics Covered

3. What data is shared when External Sharing is used - Medical

Sharing of medical records requires that both institutions have Medical Sharing turned on. Medical records can be shared at three different levels – Gold, Silver and Bronze. What medical records are shared/viewed is controlled by the lowest common level of medical records sharing chosen by the two institutions. For example, if your institution has chosen to share at the Gold Level but the institution you are sharing the record with has chosen to share only at the Bronze Level, that institution will view ONLY your records at the Bronze Level. You will never view more medical records types then you are willing to share.

Bronze Level Sharing record types:
- Anesthesia
- Physiological Measurements
- Pathology (Necropsy/Biopsy)

Silver Level Sharing record types:
- Bronze Level Sharing record types
- Medical Issues/Diagnosis
- Treatments
- Health Status

Gold Level Sharing
- Bronze and Silver Sharing record types
- All other medical records except those Clinical Notes marked as Private

In the right side dashboard of a medical record, the number of institutions that have held the animal is displayed in a colored circle. Two institutions have held this animal. If you have ever held the animal the icon will be purple. If you have never held it and the record is being shared with you, the icon will be gold.

Clicking on the icon will display a graph regarding shared medical records. Greenville Zoo is holding the animal so all of the medical records are local (yellow). Institution A has also held the animal but they did not share any medical records with Greenville (red).
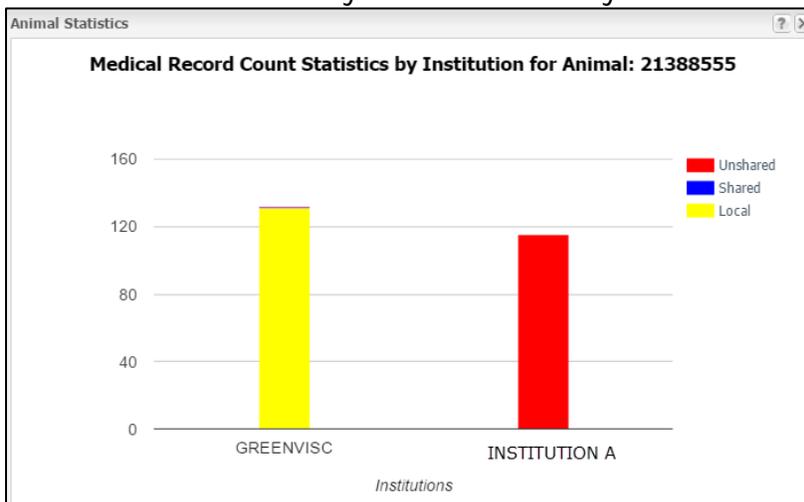
Greenville Zoo has shared the animal's medical records at the Gold Level with Cleveland Zoo who has also selected Gold Level sharing. Opening the record as Cleveland will display Greenville's sharing (blue) and no sharing by Institution A (red). Should Cleveland receive the animal and create medical records for it, the number of their records would display as a yellow bar.

Medical Record Count Statistics by Institution for Animal: 21388555

[Back to Topics Covered](#)

4.How to Activate External Sharing

External Sharing is found under Start>Institution>Institution Preferences>ZIMS Accessibility & Features.

The radio button for Accessibility for External Sharing must be checked to "On" by your Local Administrator. Under Medical Sharing select what level of sharing you want your institution to have. Only the Medical Administrator has the ability to activate Medical External Sharing unless you have created a custom Role with this access.
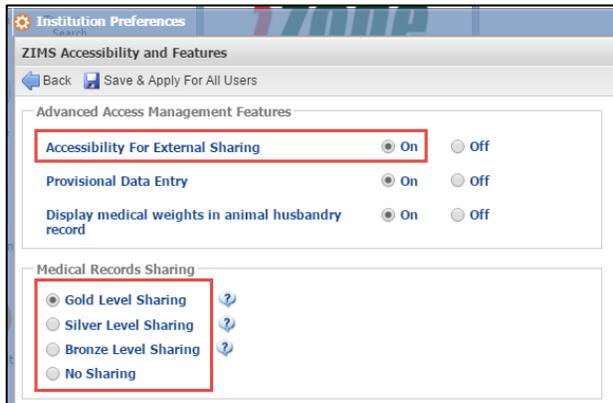
For more details on Medical records sharing go to Medical Sharing

Back to Topics Covered

5.How to Share a Record or Taxonomy

You can share single animals, multiple animals, or an entire taxonomy of records with an individual institution or with multiple institutions.

1. To share a record from Start> Institution > My Institution

2. Open the External Sharing grid. If you do not see External Sharing, you might have to enable external sharing in Institutional Preferences, under ZIMS Accessibility and Features first.
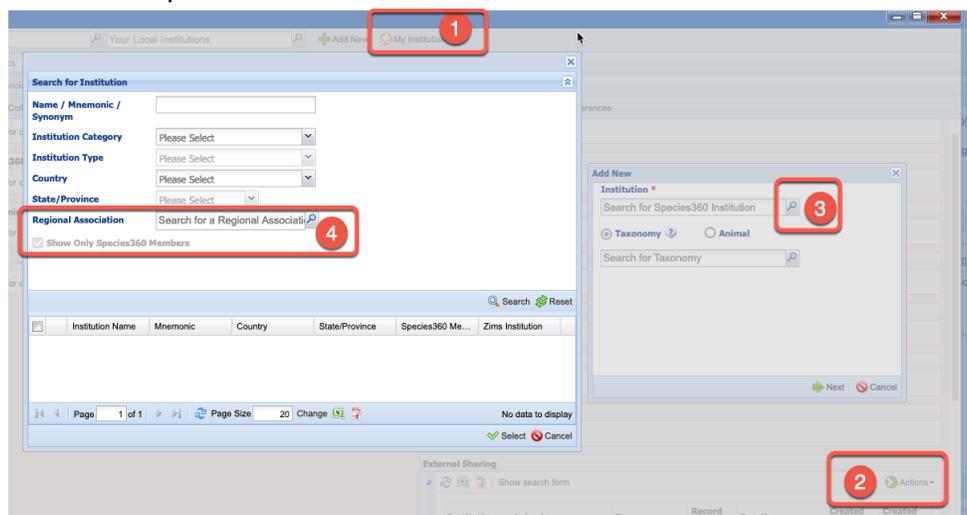
It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.
www.Species360.org – Global Information Serving Conservation

3. There is an expanded search capability to search all Institutions.
4. You can search by Regional Association and select multiple results to share with your entire region if desired.

Select the institution(s) that you want to share the record with. You can select to share all records for a specific taxonomy (this includes any animals in a taxonomy below your selection) or by a specific animal. When sharing individual animals, you can type more than one in the animal lookup box to share multiple animals at a time:
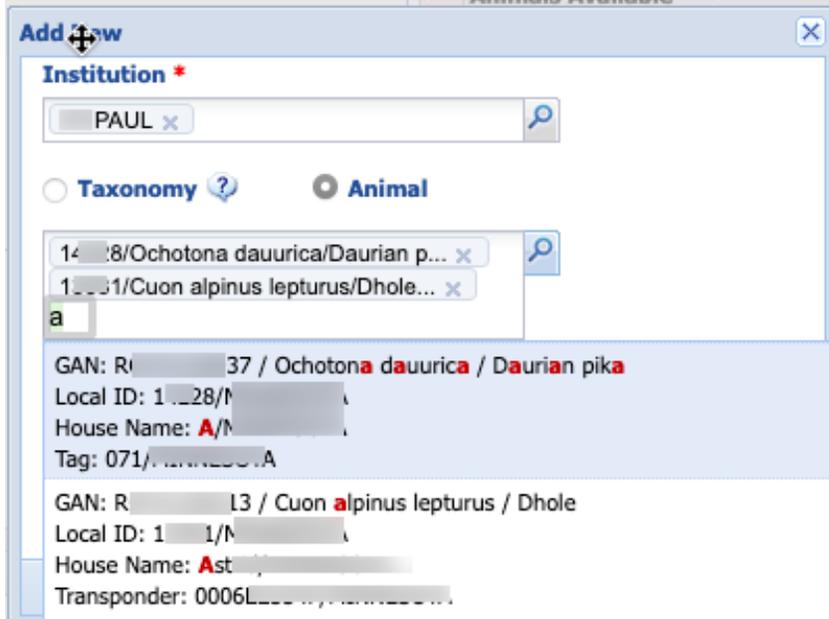
If you want to share a taxonomy you must do this from within My Institution, you cannot share an entire taxonomy from within the animal record. Shared taxonomies are also not limited to your current animals and records for all the members of that taxonomy, regardless of status, will be shared.

Below we are sharing all our giraffe records with the Toledo Zoo. To continue select Next.
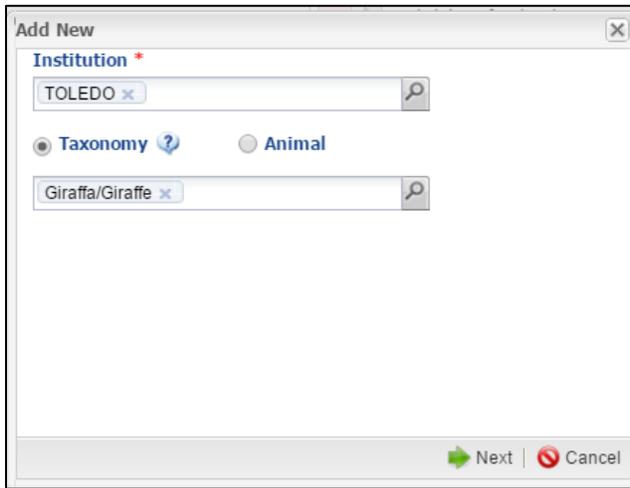
You then select what records you want to share – Husbandry, Medical or both. Only your Local Admin can share Husbandry records and only your Medical Admin can share medical records unless you have created custom Roles with this access.
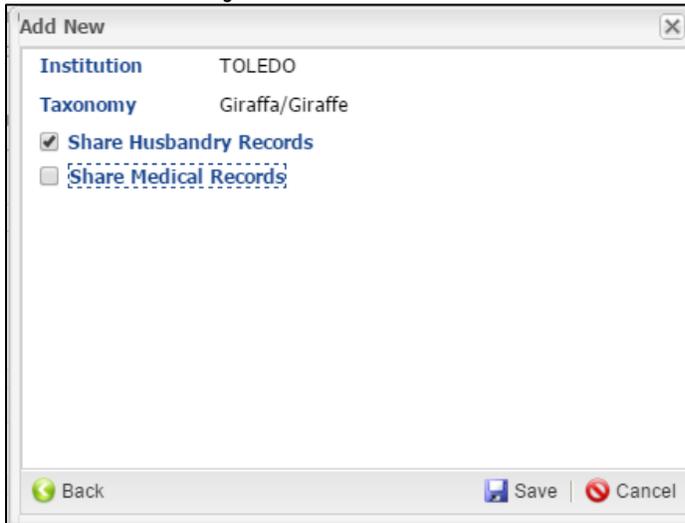
The sharing will appear in the External Sharing grid.

And it will appear in the individual records, in this case all our giraffes.

You can Externally Share a single record from within the animal record by selecting Actions>Add New. Record the desired Institution, select Next and select the record types that you want to share.

It is important to note that if you shared a taxonomy in My Institution, that sharing applies to ALL members of that species. You cannot delete single records from being shared if a taxonomy is shared. You would have to remove the taxonomy from sharing and add the individual record of that taxonomy that you want to share.

IMPORTANT NOTE: The records will continue to be shared until you remove them from the External Sharing list. Single records can be removed from My Institution or from within the record. Shared taxonomies can be removed only from My Institution and not from within a record.

Back to Topics Covered

6.Finding a Record Shared with You

The sharing institution should notify you of a shared record. To view a record that is shared with you, locate the animal using a Global search. Remember, the record is not actually "yours" so you cannot find it using a Local search. The background of a shared record will be white. Should you obtain the physical animal or ownership to it, the background will be pink.

To find all the records shared with you go to Start > Institution > Data Management.
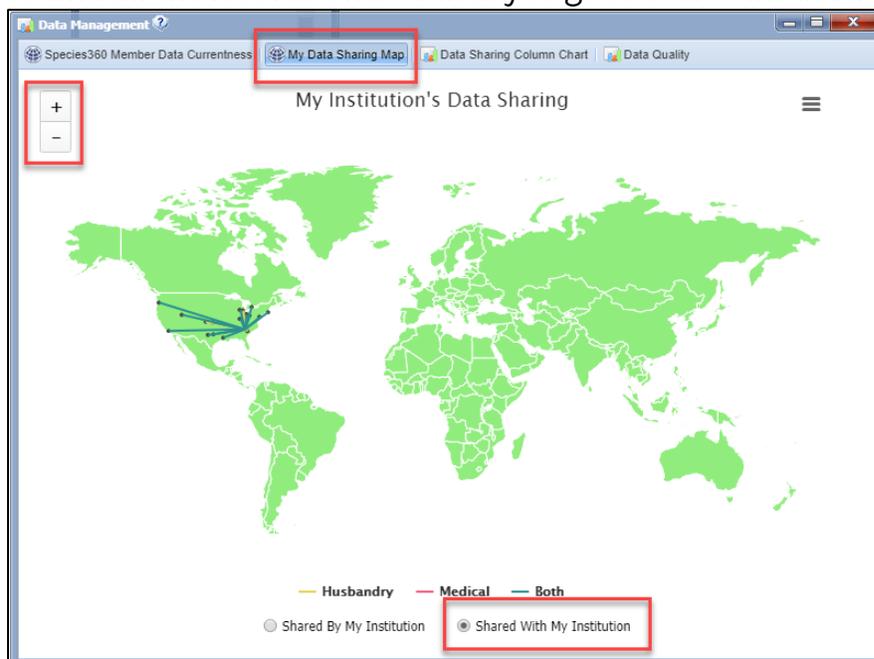
The My Data Sharing Map provides a visual of who you are sharing records with and who is sharing records with you. To see the records that are shared with you select the "Shared With My Institution" radio button. You can use the "+" and "-" to zoom in or out on the map.

Hovering over the dots will display the name of the institution that is sharing records with you.

Double clicking on any of the lines will open a list of all records shared with you. The date is the date that sharing started. The Created By is the ZIMS User who shared the record with you.

Back to Topics Covered

7.What if I don't want to share a record?

If you do not wish to share data in a record with other institutions, you can put the individual/group into a Collection that is marked as a Local scope. Feedstock and Research Collections have this option. However, Best Practices encourage the global sharing of data and this sharing is what makes ZIMS such a valuable and powerful tool.

Back to Topics Covered

8.Group record considerations for Husbandry and Medical sharing

When you add external sharing to a split group/individual but not the parent group…

- Husbandry: They can access all the information on the split group/individual; if you include group history in the group's note/observations, it only includes globally available notes for the parent group.
- Medical: They can access all the information on the split group/individual but none of the parent group
- The above is the same if they have accessioned the animal or not

When you add external sharing to a split group/individual as well as the parent group…

- Husbandry: They can access all of the information on the split group/individual; if you include group history in the group's note/observations, it includes all the notes for the parent group.
  - It does not include parent group notes from after the date of the split. Those are excluded which is a different behavior than if you use this tool for your own animals.
  - They can see these missing notes if they view the parent group's notes directly
- Medical: They can access all of the information on the split group/individual and the parent group, but they cannot use the group explorer to do so – they have to view the medical data separately for each GAN.
- The above is the same if they have accessioned the animal or not

Back to Topics Covered

9.Some helpful links

For a series of downloadable PDF documents of the value of data sharing in the SPECIES360 Community visit our Sharing Is Caring library here along with down loadable Notes/Sub-types for all modules. http://training.Species360.org/share/.

For a document on how the Local and Global values are calculated see Local and Global Values

10.Your data and Species360

The data you record lives on secure servers owned by Species360. It is stored in the hundreds of tables that make up ZIMS. Species360 takes the security and privacy of your data **extremely** seriously. Our team – who has access to the raw data in those tables – are

all bound by Species360's non-disclosure policy even after they leave Species360. Any data that is used for publication – by Species360 team members or others – is always anonymized and aggregated, and approved by the Species360 board of directors. (Note, individual members may agree with an author to allow their own specific, non-anonymized data to be used in publications; that is between the member and the author.) If you have any questions or concerns, please contact support@species360.org.

Back to Topics Covered

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