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Incomplete Accessions

Adding a new record in ZIMS so data can be collected prior to being fully accessioned.

Contact SPECIES360 Support

This document covers: <u>Creating an Incomplete Accession from the start menu</u>, and <u>Associating an Incomplete Accession</u>.

<u>Quick Split and Quick Merge</u> functionalities are covered in a separate ZIMSHelp document.

Creating an Incomplete Accession from the Start Menu

Incomplete Accessions are found under the Start menu>Accession. You do not select an entity (individual, group, egg) type for this kind of accession.

🔊 E	Macropus parma/Parma wallaby x	
N E		
	Sex Type *	
	Female	
	Birth Date *	
	Mar 03, 2014 🔤 🗌 Estimate	
	Other Information/Notes * 🖓	
	Note Templates 💌 🎯 🛃	2
Genera	B / U ABC <u>A</u> ▼ ⁴ 2 ▼ 2 !Ξ !Ξ	
ochere	a č 🎔 🔳	
ents	Notes are mandatony	
	Genera	Birth Date* Birth Date* Mar 03, 2014 I Estimate Other Information/Notes* V Image: Second state of the second state of

All fields are mandatory. Notes about the Incomplete Accession must be included to help whoever is recording the full Accession associate correctly.

The record is assigned a GAN that ends in IA – and you can quickly access the husbandry or medical records for this newly created record from the confirmation screen:

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😴 Incomplete Accession
🛃 Save 🛛 🚽 Save & Repeat 🛛 🌮 Reset
Taxonomy * Canis aureus lupaster/Golden jackal ×
Canis aureus lupaster/Golden jackal
Birth Date * 01/Jun/2022 🖾 🗷 Estimate
Estimate Type pproxBefore
Note Templates V ()
B Z U ASC A → ¹ /2 → 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1
Accessic vias been successfully completed. Incomplete accession is successful.GAN: RCV22-0132 -IA
Undo Accession Transaction Close
See medical records for this animal(s).
See husbandry records for this animal(s).

Incomplete Accessions will display in the Statistics field in the Animals module. The total number is indicated at the top and is divided up by time frame.

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ding Transactions - By Other Institutions (6) Incomplete Accessions (1)
<u>t 180 days (0)</u>	<u>- Last 180 days (1)</u>
<u>t 1 year (3)</u> ler than a year (3)	 Last 1 year (1) Older than a year (0)
	<u>t 100 davs (2)</u> <u>t 1 (vear (3)</u> ler than a year (3)

You can record most of the data that you can record on a full accession except:

- Collection
- Responsible Party
- Enclosure
- Enrichment
- Parents
- Cannot share with another institution
- You cannot disposition an Incomplete Accession

Once a full accession is created and associated with an Incomplete Accession, all data will be copied into the full accession.

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Incomplete Accessions can be found under the Start menu search and in Animal Simple Search and Animal Advanced Search if Local Scope and All Animals and Include Incomplete Accessions is checked. They cannot be found if Global scope is selected. They can also be found in Medical module searches.

Incomplete Accessions do not display in most Reports. They will display on Daily Report and in Activity Reports as Transactions/IA Note.

Associating/completing an Incomplete Accession

The incomplete accessions are found within the Statistics tab of the animal module. Click on the Incomplete Accessions hyperlinks to open the list.

ear	ch Animals By Identifier/GAN	Filter By Institution	lists 💞 🛛 Batch Measurements 🦓
	Statistics		
	Animal Statistics 🖓		
	Pending Transactions - By My Institution (0)	Pending Transactions - By Other Institutions (6)	Incomplete Accessions (1)
	<u>- Last 30 days (0)</u> <u>- Last 180 days (0)</u>	<u>- Last 30 days (0)</u> - Last 180 days (2)	<u>- Last 30 days (1)</u> - Last 180 days (1)
	- Last 1 year (0)	- Last 1 year (3)	- Last 1 year (1)
	- Older than a year (U)	- Older than a year (3)	- Older than a year (0)

The list will display all of the active Incomplete Accessions. They may have been filtered if you for example chose to only see those from the past 30days. Within the list, you can archive any Incomplete Accessions you want to hide from your list, re-activate them, complete them or remove them.

23 A	nimals LearnZIMS_TRAINING_ONL										
Sea	rch Animals By Identifier/GAN	م	Filter By Institution		P E Your animal lists -						
»	Statistics Incomplete Accession (1) (8)										
	🕸 🍸 - 😐 Archive selecter	d 🈷 Active selected 💼 I	nclude archived records Com	plete selected 🤣	Remove selected						
	Animal GAN	Scientific Name	Common Name	Sex	Birth Date	Identifiers	Record Created Date	Record Created			
	CBH22-00041-IA	Ailurus fulgens	Red panda	Female	09/06/2022	[Incomplete Accession Number:CBH22-00041	21/07/2022	Species360 Trai			

There are multiple ways to complete an Incomplete Accession:

- 1. <u>Create a single new accession using the incomplete accession as a base</u>
- 2. Associate a single incomplete accession with an already created full accession
- 3. Associate multiple incomplete accessions with an already created full accession
- 4. <u>Create a full accession and associate one or more incomplete accession when</u> <u>saving</u>

Creating a single new accession using the Incomplete Accession as a Base You can now use the Incomplete Accession as a base record to start your accession. To start, from the Incomplete Accessions list select the appropriate record and Complete Selected.

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S	Animals LeernZIMS_TRAINING_ONLY							
Se	earch Animals By Identifier/GAN	P 🤉 Filter By Institution	n	👂 🗄 Your ani	nal lists 🎺 🛛 Batch Measurements 🆓			
>>	Statistics Incomplete Accession (1)							
	🕸 🝸 - 🛚 Archive selected 🌁 Active selected	Include archived records	Complete selected 🤣	Remove selected				
	Animal GAN Scientific Name	Common Name	Sav	Birth Date	Identifiere	Record Created Date	Record Created	
	CBH22-00041-IA Ailurus fulgens	Red panda	Female	09/06/2022	[Incomplete Accession Number:CBH22-00041	21/07/2022	Species360 Trai	

The pop-up complete screen has the full list of accession options. Choose the correct accession type for your record.



The usual accession screen for your chosen option will open, and will pre-fill with any information from the Incomplete Accession. For example, here the Accession Date, Taxonomy, Sex and the Note have pre-filled from our Incomplete Accession.

Accession Details		Taxonomy Information	
Accession/Birth Date *		Parent Info *	
09/06/2022 🖸 🗌 Es	stimate	Add/Edit Parent Information	
Birth Type *	Terms *	Taxonomy * 🥐	Taxonomy Determination
Please Select 💌	Please select	Ailurus fulgens/Red panda x	Please Select
Nest ID		Sex Type *	Life Stage
]	Female	Please Select
Clutch/Litter ID		Pecord Pearing Information	
Please Select 🔹	Add New Clutch/Litter ID		
Local ID • V T0044 Collection • Primary Animal Collection v Enclosure Training × P	Responsible_Party Species360 Training ¥	Conception Place Please Select Conception Date Birth Location Institution Geo Loc Undetermined Indeter Institution Training ×	ate ation ninate
Notes			
		Note Template	× 🖓 🗖 2

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All pre-filled information is editable. As with the usual accession screens, the Taxonomy field can only be edited once Parent Information has been added.

To finish the accession & association, fill in the remaining information and click Save. A pop-up box will alert you that the full accession has been created. If you made a mistake with the full accession, clicking "Undo Accession Transaction" will roll back the accession and allow you to edit the information.

Now you will need to click the "Associate with Incomplete Accession" button to complete the association.



A pop-up box will tell you the records have been successfully merged into the full accession. From here you can choose to view the animal's husbandry or medical information. If you need to un-do the association, click the "Undo Association of the Incomplete Accession" button.

Accession has been successfully completed.	
The information (identifiers, notes, medical records, etc.) been copied into the fully-accessioned animal GAN: <u>CBH2</u> ; accession records have been deleted.	from the Incomplete accession CBH22-00041-IA have 2-00042/ <u>Red panda/Ailurus fulgens</u> . The incomplete
S ()	Undo Association of Incomplete Accession Close

Associating a single incomplete accession with an already created full accession

The second way to associate the records requires a full Accession to already be in the database. This can happen if someone doesn't realize the record is already entered into ZIMS and creates an Incomplete Accession. From the Incomplete Accessions list select the appropriate record and Complete Selected.

¢0	TCIT 7	Animais by Identi	IIEI/OAN	~	The by Institute	11	- Tour ani	mai lists
Ð	St	atistics Incomp	lete Acce	ssion (6) 🗵				
	Þ	🍸 🗧 🛢 Archi	ve selecte	d 🏻 🤭 Active selected 🔹 🖍 In	clude archived records	Complete selected 🤣	Remove selected	
		Animal GAN		Scientific Name	Common Name	Sex	Birth Date	Identifiers
		HSV20-00172-IA		Branta canadensis	Canada goose	Undetermined	03/01/2020	[Incomplete Accession Nu
		HSV20-00173-IA		Acinonyx jubatus	Cheetah	Undetermined	03/01/2020	[Incomplete Accession Nu
		HSV20-00174-IA		Bolborhynchus	Parakeet	Female	03/01/2020	[Incomplete Accession Nu
	1	HSV20-00175-IA		Canis lupus familiaris chih	Chihuahua	Male	03/01/2020	[Incomplete Accession Nu
1		HSV20-001/6-IA		Aves	Birds	Undetermined	03/01/2020	[Incomplete Accession Nu
		HSV20-00177-IA		Castor	American beaver	Undetermined	03/01/2020	[Incomplete Accession Nu

The application will ask what full accession to associate the Incomplete Accession

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with. Use the search box to search and select the record you want to associate with the Incomplete Accession. Once you save, the records will be associated.



If information in the two records is different, ZIMS will ask which information you wish to keep. All data recorded on the Incomplete Accession will be migrated into the full Accession record.



The GAN of the Incomplete Accession will become an Old Accession number in the Identifier grid of the full record. If multiple Incomplete Accessions have been associated with a single full Accession, all of the Incomplete Accession GANs will be listed.



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Associating multiple incomplete accessions with an already created full accession

You are able associate multiple incomplete accessions to a single full accession. This may occur when you have multiple incomplete accessions made for the same animal by different staff, or multiple incomplete accessions for different animals which need to be associated with a group.

To associate multiple IAs with the same record, highlight the IAs you wish to associate and click "Complete Selected". You will only be given the option to associate the records with an already established record through this menu, if you need to create a new record you can do so first by completing a normal full accession and then completing the new IAs).

Search for and select the designated record you want to associate the records with and click Save.

rch	Animals By Identifier/C	GAN .	PZF	ilter By Institutio	n	P E Your an	nimal lists 💞 🔰 Batch N	1easurements ?
S	tatistics LZH22-00001,	Panthera leo 🛞 Incomplete	Accessio	on (7) 🙁				
A.	Archive se	lected 1 😁 Active selected 1 🖷	Include	archived records	Complete selected 🐠	Remove selected		
	Animal GAN	Scientific Name	Com	imon Name	Sex	Birth Date	Identifiers	
V	LZH22-00024-IA	Pachypanchax arnoulti	Pano	chax	Undetermined	~< Aug 08, 2022	[Incomplete Accession	Number:LZH22-00024-IA
	LZH22-00025-IA	Pachypanchax arnoulti	Pano	chax	Undetermined	~< Aug 08, 2022	[Incomplete Accession	Number:LZH22-00025-IA
	LZH22-00026-IA	Pachypanchax arnoulti	Pan	Complete Acces	sion of CAN: 17H22-00	024-14 17822-00	0025-10	umber:LZH22-00026-IA
	LZH22-00029-IA	Pachypanchax arnoulti	Pan	complete Acces	SIGH OF GAN. LETTZE-O	1024-IA, L21122-00	1023-IA	umber:LZH22-00029-IA
	LZH22-00030-IA	Pachypanchax arnoulti	Pan	Associate Inc	omplete Accession wit	h an Accessioned /	Animal 🖓	umber:LZH22-00030-IA
	LZH22-00031-IA	Pachypanchax arnoulti	Pan	Search Anim	al by Identifier/GAN	Q		umber:LZH22-00031-IA
	LZH22-00035-IA	Panthera leo	Lion					umber:LZH22-00035-IA
							🛃 Save 🚫 Cancel	

If you have already associated incomplete accessions with the record before, you will get a warning asking if you are sure you want to associate another incomplete accession with this record. If you are sure, click "Go ahead and save".

Warning	×
♪	You have already used GAN: LZH22-00028 Pachypanchax arnoulti / Panchax to complete more incomplete accessions. Do you wish to continue?
	Go ahead and save Let me correct

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If the information in the incomplete accessions and full record do not match, you will receive a warning, and ZIMS will default to keep the information from the full accession.

Warning		×
⚠	The information entered on the animals does not match. The information entered on the already accessioned animals will be kept. This message is just for your information.	
	GAN: LZH22-00024-IA (Incomplete Accession Information) Taxonomy: Pachypanchax arnoulti / Panchax Sex Type: Undetermined Date of Birth: ~ < Aug 08, 2022	
	GAN: LZH22-00028 (Accessioned Animal's Information) Taxonomy: Pachypanchax arnoulti / Panchax Sex Type: Indeterminate Date of Birth: Jan 06, 2021	
	GAN: LZH22-00025-IA (Incomplete Accession Information) Taxonomy: Pachypanchax arnoulti / Panchax Sex Type: Undetermined Date of Birth: ~ < Aug 08, 2022	
	OK Cancel	

Creating a full accession and associating single or multiple incomplete accessions when saving

When you create and save a full accession, ZIMS will automatically search by taxonomy to see if there are any Incomplete Accessions which are waiting to be completed. If there are Incomplete Accessions for the same species, you will receive a message that a possible match has been found. To associate the full accession with an incomplete accession, check the appropriate Incomplete Accession box/boxes and then click Associate with Incomplete Accession.



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If information in the two records is different, ZIMS will ask which information you wish to keep. All data recorded on the Incomplete Accession will be migrated into the full Accession record.



If you have chosen to associate more than one incomplete accession, ZIMS will default to keep the accessioned information.

The GAN of the Incomplete Accession will become an Old Accession number in the Identifier grid of the full record. If multiple Incomplete Accessions have been associated with a single full Accession, all of the Incomplete Accession GANs will be listed.

Identifiers	2			
	Туре	Identifier	Location/Descriptor	Status
Ģ	Local ID	Z1	120 A	Active
Ģ	Old Accession Number	PLT14- 00650-IA	*	×
Prev	Page 1	of 1 Next	Page Size 20 Cha	ange



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Incomplete Accessions generated by MedARKS

Some of these Incomplete Accessions may have been created as non-accessioned animals in MedARKS (the medical software prior to ZIMS). These Incomplete Accessions end with an IC instead of an IA. Also, if you imported medical records into MedARKS, some of those imported records were linked to animals that did not come to your institution. For example, you get a group prescription record that is linked to the animal you received and 9 other animals that stayed at the other institution. If the imported record was only linked to your animal, it would appear that your animal got 10 times the dose it actually got; that would be very misleading when you look at that record. To compensate, MedARKS created 9 non-accessioned records sourced to the sending institution, so the prescription record remains attached to 10 animals and does not mislead the new institution.

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