
Pending Transactions

How to resolve easy and complex pending transactions

[Contact SPECIES360 Support](#)

Topics Covered

[Why are Pendings Important?](#)

[Pending Options](#)

[Duplicate Transactions](#)

[Disposition is Initial Transaction](#)

[Possible Duplicate Animals](#)

[Group Transactions](#)

[Incomplete Dispositions](#)

[Transactions for Support](#)

Why are Pendings Important?

Pending Transactions allow you to review what other institutions have recorded on shared global records and agree or disagree with their data. Pending Transactions are ONLY created when the transaction is between two ZIMS institution. Every time someone enters a new transaction on an existing record, ZIMS checks to ensure that all the historical transactions are "linked" properly in the database. To users it may look like everything is complete on their end, but the database may be missing some 0's and 1's in a single cell in the table. If the transaction is not linked properly or if two institutions disagree on any part of the terms, it will produce an historical pending to give users the opportunity to fill in the blanks, improving everyone's data quality.

The results of the pending transactions -- the My Transactions stream -- is what many reports use to count numbers. If you find you have too few animals or too many at the end of the year, you may be missing a transaction or have some duplicate transactions.

A list of your Pending Transactions display at the top of the Statistics tab in the Animal module. They are divided up by Pending Transactions – By My Institution and Pending Transactions – By Other Institution.

- By My Institution
 - Another institution recorded receiving an animal/group from you before you recorded sending it to them or another institution recorded sending an animal/group to you.
 - It is your responsibility to address these.
- By Other Institution
 - You recorded sending an animal/group to another institution or you recorded receiving an animal/groups from another institution.
 - It is their responsibility to address these.

Hopefully your Pendlings will be easy to address and finalize. There may be some, especially historical transfers, that can be more difficult to sort out. Some recommendations to help you are:

- Review Notes and Observations, they may help clarify a date or an institution.
- Look at the Physical Transaction History and the Ownership Transaction History grids. What you see in My Transactions reflects only transfers that involve your institution. These grids display the entire transaction history for the record.
- Contact the other institution involved. It may have simply been an error that is easily fixed.
- When all else fails, contact support@species360.org. They are happy to help you sort out any problems. For some Pending problems that commonly need help from support see

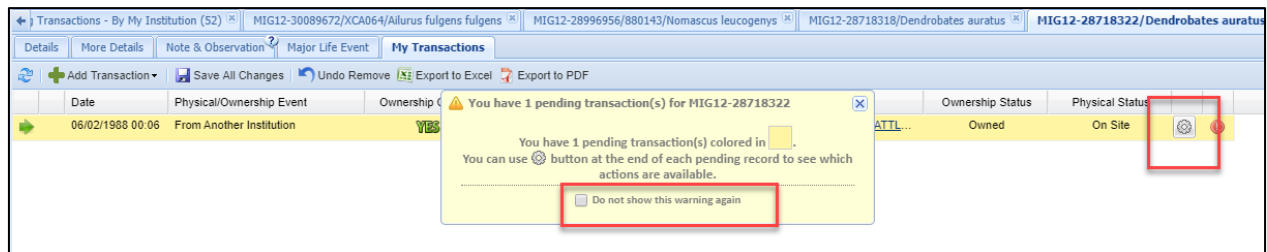
[Transactions for Support.](#)

There are too numerous variations on Pendlings to address all possibilities, but the following examples will give you ideas on how to work through any Pending problems that you encounter. NOTE: You have to address all the Pending Transactions in My Transactions before you can successfully save them; you cannot save one at a time.

[Back to Topics Covered](#)

Pending Options

In the animal record Pending Transactions display in the My Transactions tab. Pending Transactions are highlighted in yellow. In addition, you receive a message that you have a Pending Transaction for this record. If you do not wish to continue to receive this warning, check the “Do not show this warning again” checkbox and close the message. It will no longer appear for any of your Pending. To address the Pending, select the wheel icon on the right.



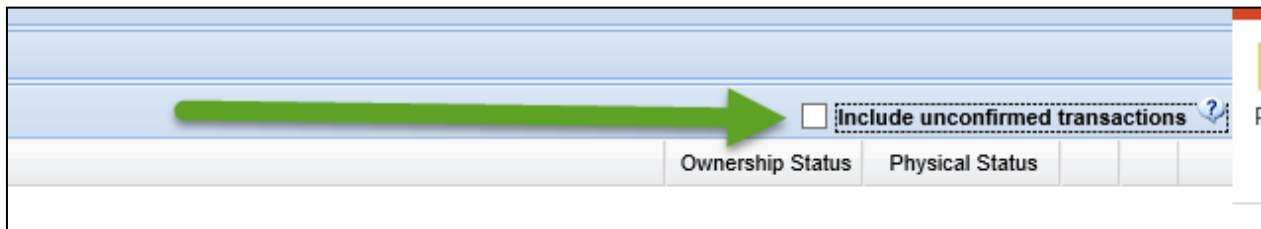
You have five options when addressing a Pending transaction

- Confirm/Edit -- Means that you agree with the transaction. Either you sent the animal somewhere but you have not yet recorded it, or you received an animal from someone else.
 - You can make minor edits such as date
 - This will remove any Pending for both institutions
 - The transaction is completed as entered
- Deny -- Means that you disagree with the transaction. You did not send or receive the animal.
 - This will remove the transaction from your My Transactions and the Pending list
 - This will create a Pending for the other institution in red.
 - An automatic note is placed in the record that the transaction was denied.
 - We consider it best practices to contact the other institution if you select Deny to let them know why you are selecting that option.
 - If you agree with a Denied transaction
 - Delete it from your My Transaction stream
 - The red Pending is removed
 - Animal status remains Alive
 - If you don't agree with a Denied transaction
 - Leave it in your My Transaction stream

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.

- This creates a conflict
- Animal status is Lost to Follow Up
- If an institution says they received an animal from you that you never sent
 - Same animal is in two places now
 - Species360 may need to assist
- No Information Available -- Means that you neither Confirm nor Deny the transaction. You have no record of it and the transaction may or may not have occurred.
 - The transaction is removed from your My Transaction stream and the Pending is removed
 - Animal status is Lost to Follow Up
 - Post Office message is sent to the other institution
 - We also recommend contacting the other institution, they may have documentation confirming the transaction with you.
- Not Recorded in ZIMS -- Means that you agree that the transaction occurred, but you have not recorded or will not recorded the animal involved into the ZIMS database.
 - The transaction is removed from your My Transactions stream and the Pending is removed
 - Animal status is Lost to Follow Up
- Delete – Means the transaction was recorded in error
 - You can only delete a transaction that your institution recorded
 - If you did not, contact the other institution and have them delete that transaction line

If you select No Information Available or Not Recorded in ZIMS, if you change your mind later you can reopen the Pending by checking the “Include unconfirmed transactions” checkbox.



The transaction will re-appear in your My Transactions stream and you have the option to Confirm.

[Back to Topics Covered](#)

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

Duplicate Transactions

These are the transaction problems that most commonly result in report miscounts.

Below you have duplicate acquisitions and dispositions. This probably happened because one or the other institutions did not see a pending transaction, so both entered them.

Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status
12/10/2003 00:00	From Another Institution	NO	YES	Loan In From(Physical Only): Sender: MEMPHIS	Not Owned	On Site
12/10/2003 00:00	From Another Institution	NO	YES	Loan In From(Physical Only): Sender: MEMPHIS	Not Owned	On Site
11/17/2005 00:00	To Another Institution	NO	YES	Loan Transfer To (Physical Only): CENTRALPK	Not Owned	Off Site
11/17/2005 00:01	To Another Institution	NO	YES	Loan Transfer To (Physical Only): CENTRALPK	Not Owned	Off Site

First, compare what you recorded verses what the other institution recorded for the acquisition.

Acquisition - From Another Institution

Date * 12/10/2003 00:00 Estimate

OWNERSHIP PHYSICAL

Terms * Loan In From(Physical Only) Your Local ID * XCA064

Owner * NASHVILLE Local ID / GAN * 1775

Sender * MEMPHIS Local ID / GAN * 20452

Price Currency Please Select

Edit Shipping Details

Clutch/Litter ID

Done editing Cancel

Acquisition - From Another Institution

Date * 12/10/2003 00:00 Estimate

OWNERSHIP PHYSICAL

Terms * Loan In From(Physical Only) Your Local ID * XCA064

Owner * NASHV ZOO Local ID / GAN * 1775

Sender * MEMPHIS Local ID / GAN * 20452

Price Currency Please Select

Edit Shipping Details

Clutch/Litter ID Not in the list?

Confirm Transaction Cancel

You both agree on the Date, the Terms, the Owner and their Local ID and the Sender and their Local ID. Because you cannot delete a transactin entered by another institution, you delete your entry and Confirm their entry.

You then compare the disposition entries. Again, you both agree on all data. You delete your entry and confirm their entry. Because all Pending have been addressed you can now save.

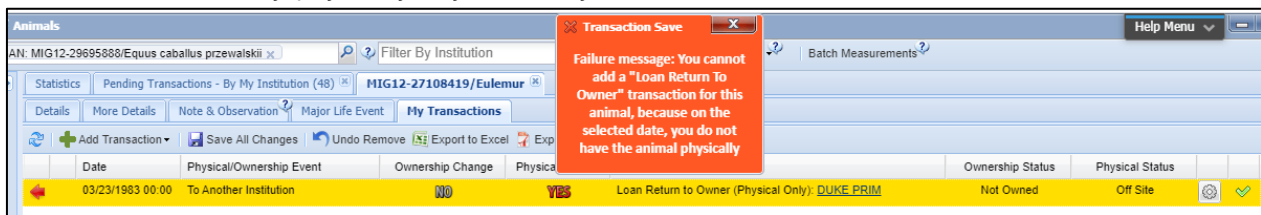
Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status
12/10/2003 00:00	From Another Institution	NO	YES	Loan In From(Physical Only): Sender: MEMPHIS	Not Owned	On Site
11/17/2005 00:01	To Another Institution	NO	YES	Loan Transfer To (Physical Only): CENTRALPK	Not Owned	Off Site

This was an easy example because you all agreed on the data and you could delete your entry. If you did not agree on the data you would need to contact the other facility to either have them correct their data, or you correct yours if they can prove it was incorrect, or Deny the Pending.

[Back to Topics Covered](#)

Disposition is the Initial Transaction

The transaction below is starting with a disposition from you recorded by another institution. If you agree the transaction took place you can Confirm it. However, since you did not have a record that the animal was actually physically at your facility, it cannot be saved.



First, do some research and if you find that you did have the animal, create the acquisition record. You can then Confirm the disposition, but only if you agree. If you have no record of having the animal you should Deny the transaction or, if you know you had the species some time before but have no way to attach an acquisition, select No Information Available. If you had the species but it was not, and will not be, recorded in ZIMS, select Not Recorded in ZIMS.

[Back to Topics Covered](#)

Death for Animal Out on Loan

The following is a Pending for a transaction and a Death record.

Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status
06/06/2006 00:00	Birth/Hatch	YES	YES	~	Owned	On Site
12/21/2006 12:00	To Another Institution	NO	YES	Loan Out To (Initial Transaction - Physical Only): CHATTANOOG	Owned	Off Site
01/10/2008 00:00	Reported Holder	NO	NO	Loan Out To (Change in Reported Holder) PUEBLO	Owned	Off Site
12/05/2016 12:00	Death	YES	NO	~	Not Owned	On Site





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.

You have confirmed the transaction but it will not save until you confirm the death and you are wondering why. You must Confirm deaths for animal out on loan to remove them from reports and search results for Ownership as ZIMS sees the Ownership as remaining Alive because the Holding institution has only recorded the Physical part and cannot record the Ownership part on your behalf.

[Back to Topics Covered](#)

Possible Duplicate Animals

The following Pendings are for a Birth Out on Loan. The birth date is many years ago and followed by a disposition. This is a red flag that it may be a duplicate for an animal already entered but never linked.

Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status		
06/14/1996 00:00	Birth/Hatch	NO	YES	~	Not Owned	On Site		
02/20/1997 00:00	To Another Institution	NO	YES	Loan Transfer To (Physical Only): ATLANTA	Not Owned	Off Site		

You check your data and find a matching record. If you confirm these Pendings there will be duplicated animals in the database. Because you did not record the information you cannot delete it. If you do not have additional information in your record you can opt to delete your record and Confirm these Pendings. However, if you have both entered data into the respective records you will need to contact support@species360.org to merge the two records together.

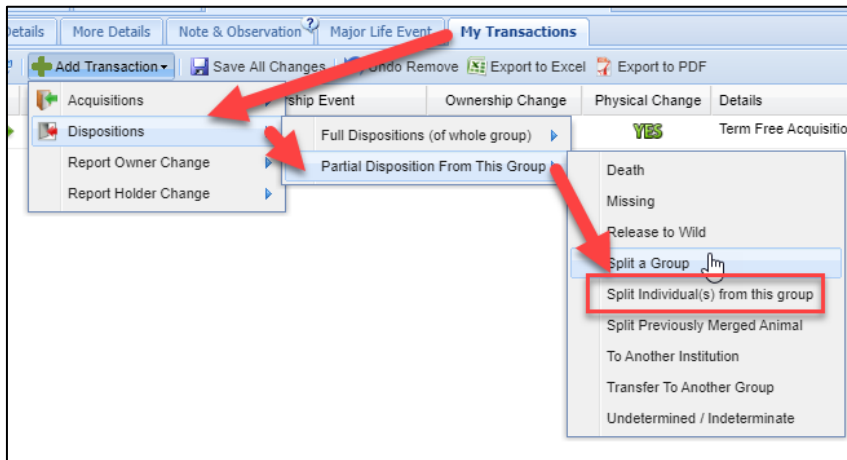
Group Transactions

There are two kinds of group transaction problems and they require different solutions. Both start with accessioning the transactions as is (individual or group), regardless of the final entity type desired.

Sending institution sent as group, receiving institution wants individuals

After Confirming the Pending for the group, go to My Transactions > Add Transaction > Disposition > Partial Dispositions from this Group > Split Individual(s) from this Group.

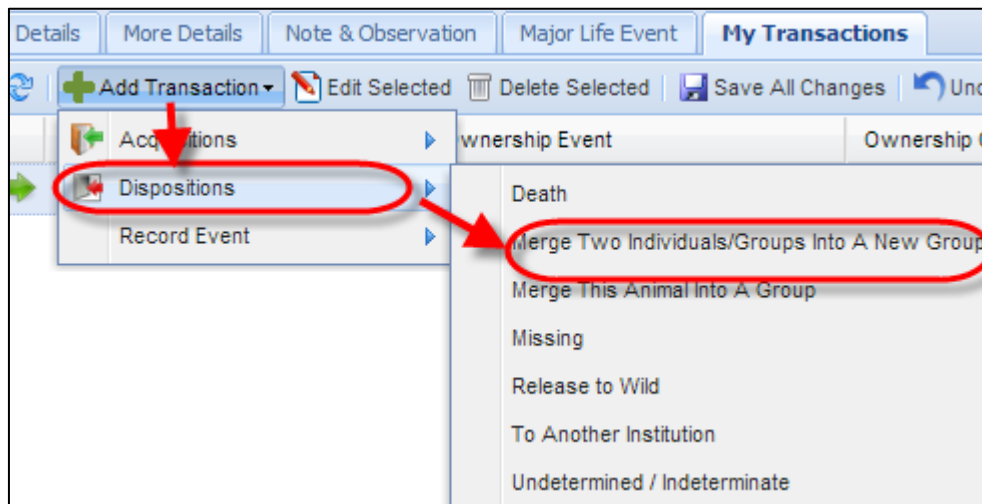
It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.



The Date should be the date of the acquisition. Time needs to be later (even just one minute) than the acquisition time. Check Batch Split and record the Local IDs or generate (if using auto-increment Local IDs) the required number of Local IDs. Complete the screen and Add to Transaction List > Save All Changes. You should receive a message that the Group count is brought down to zero. Because you did Partial Transactions you will need to Close Out the Group (Dispositions > Full Disposition > Death/Close Out). The Date should be the date of the acquisition and the Time one minute after the last Individual Split.

Sending institution sent as individuals, receiving wants a group

Accept the Pendlings for all the individuals. After accessioning the individuals, you will have to merge them all into a new group. Open one of the individual records (or you can just stay in the last record that was Confirmed) and go to My Transactions >Add Transaction > Dispositions > Merge Two Individuals/Groups Into a New Group.



Record the next individual record under Additional Individual/Group and record the Local ID for the new group. Complete the screen > Add to Transaction List > Save All Changes. You now have two options. You may need to adjust the time stamp using either one of these options.

- One, you can open the new group record > My Transactions > Add Transaction > Partial Acquisition > Merge Individual(s) Into the Group. Under Animal field record all the remaining individual records > Add to Transaction List > Save All Changes. This method is fastest.
- Second, you can open each individual record > My Transactions > Add Transaction > Disposition > Merge Animal into a Group.

Using either method, you now have a group made up of all the individuals you Confirmed.

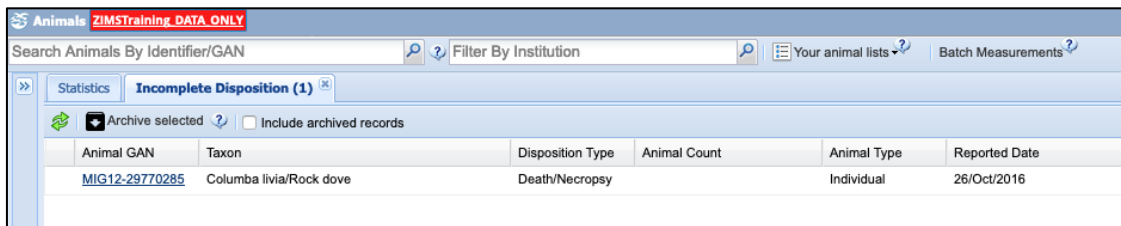
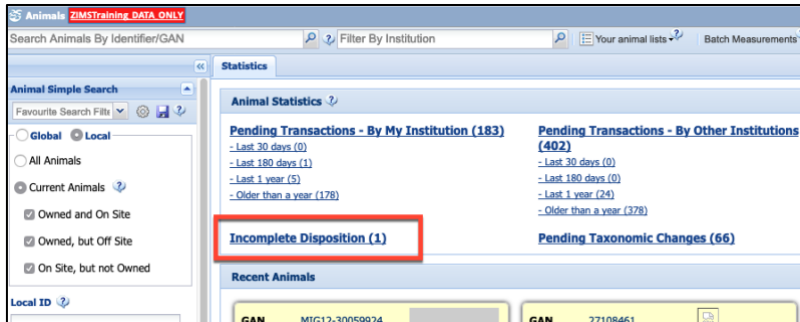
It is considered **best practices** to always accession or Confirm the Pending as the entity type they were sent (group as a group record, individual as individual record). Therefore, if you send animals and receive a pending in a different form, it is both within your rights and **encouraged** that you reject it! If you have already created a record for a different entity than what was sent, contact support@species360.org for help with correcting the records.

Incomplete Dispositions

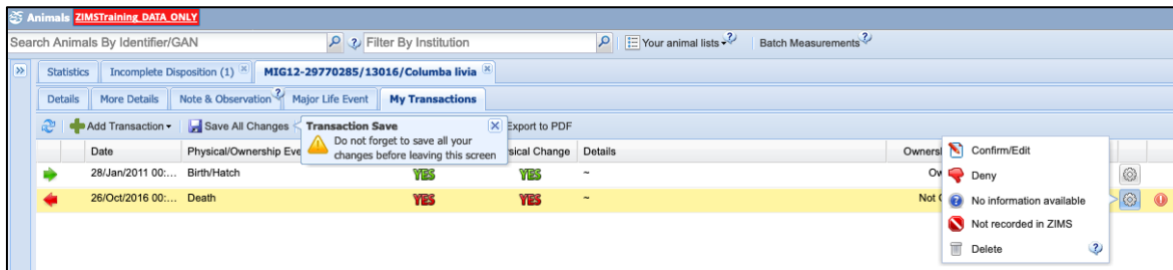
These are internal notifications created during the start of a Necropsy Submission in ZIMS for Medical prior to a Death being recorded in Husbandry. These are generated for your team to ensure that your

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.

husbandry and medical teams are notified when death dispositions are initiated in a part of ZIMS that they might not normally see. Incomplete Dispositions are found in the Animal Statistics grid.



Clicking on the GAN hyperlink in the Incomplete Dispositions search list will open the animal's My Transaction tab with the death transaction as a Pending. Confirm the Pending to record a Death in the Husbandry record. If you feel this is an error, contact the medical team to remove the necropsy record or confirm it is correct.



Because the Necropsy submission in Medical triggers a Death Pending in Husbandry and, in reverse, a Death recorded in Husbandry triggers a Necropsy in Medical, it is **best practices** that both teams recording death information agree on the death related details such as date and time of death, manner of death and relevant death information.

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.

[Back to Topics Covered](#)

Transactions for Support

There are some transaction problems that are difficult to correct on your own. These most often break down into the following four groups:

- **Loop** - You confirm the transaction, the other party confirms, you confirm, ad infinitum. This is a bug.
- **Cannot Edit** - When you try to confirm, there is required information you must enter but the field is grey. This is a bug.
- **ARKS Legacy** - Because ARKS (the Species360 application prior to ZIMS) is very different from ZIMS, for compatibility reasons some transactions that migrated cannot be edited by the users.
- **Local ID Already Exists** - When this message occurs, it is likely there are two records for the same animal.

In all of these cases, please email support@Species360.org so that our team can assist you in working this out!

[Back to Topics Covered](#)

Revised 17 April 2020