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Colony Functionality in ZIMS

How to record a Colony record.

Contact Species360 Support

The Colony functionality in ZIMS serves for species that:

- Live in close association with each other, often for mutual benefit (examples: ants and honeybees)
- Live in groups so large it is difficult to count or estimate the number of members (examples: schools of fish and large naked mole rat group)
- Live in compact groups of genetically identical members that can be fragmented (example: corals)

The Colony functionality was designed so that your inventory count would not reflect the count of the members of the colony, which can sometimes be in the tens of thousands. Instead, a colony will count as "1" (or whatever count you choose) in your inventory. By default, this count is "1", and in most cases this count of "1" is considered to be a Best Practice.

There are two terms that must be understood:

- Colony Inventory Count This is the count that will display on your Inventory and Taxon Reports and search results as 1 unit (or whatever you recorded for the Colony Inventory Count). You can set the default for this count in Institution Preferences and also change this count within each Colony record. This number will remain regardless of any group splits or merges. Only a Full disposition will bring this number down to zero.
- Group Count This is an estimated number of members within the Colony. Some Users like to track these estimated numbers as it gives them an idea of the size of the Colony. This number will NOT display in Inventory and Taxon Reports and search results. It can only be changed by recording a Group Census or brought down to zero by recording a Full Disposition Transaction.

The default Colony Inventory Count is the number that will display when you create a new Colony, but it can be edited during the accession. To change the default count, go to Institution > Institution Preferences > Measurement and Census Preferences. At the bottom is Census Preferences.

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degree Celsius	~
Show Measurement Tips	
Census Preferences	
Default Colony Inventory Count	2
Default Tracking	 Track By Life Stage Track By Sex Type

To accession a colony, go to Start > Accession > Group of Animals > select Transaction Mode.

	Parent Info *	
	Dam:Undetermined Sire:Undetermined	
L	Taxonomy * Taxonomy Determinat	ion
	Apis mellifera/Honeybee x	~
	Record Group Count * (1000) Colony	
	Record Rearing Information	
,	Birth or Establish Information	
	\bigcirc Birth Information $$ $ \ensuremath{ \odot \ensuremath{ \ensuremath{$	
	Ectablish Date * Ectablish Type	ŧ
v	Establish Date Establish Type	
•	Sep 09, 2018 🖸 🗆 Estimate Captive Establis	shed 🌱
	Sep 09, 2018 Captive Establish	shed 💙
•	Sep 09, 2018 Establish Location Institution Geo Location	shed ¥

You will need to record a Group Count of the members of the colony. This can be an estimate of the total numbers, or, you can simply record your count of "1" (or whatever your Colony Inventory Count was). This number will display in your census grid and in My Transactions, but your Inventory and Taxon Reports and search results will display your chosen Colony Inventory Count. Then check the Colony checkbox.

If you have already accessioned a group that you now wish to manage as a colony, open the Census Info grid and check the Colony checkbox.

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Census Info										Actions ▼	
		Track By Sex Type 🗙 Track By Life Stage 💥					Colony	Show	Show only my records		
			Census Date	Census Event	Total Count	Sex Track	LS Track	Method	RP	Reported By	
		G	Jun 01, 2018 00:00	From Another Institution (0.0.500)	0.0.500	×	×	Undetermined	-	GREENVISC	

This will activate the Colony Inventory Count in the Taxonomy / Collection / Colony Inventory Count grid. The date it was made a Colony is captured.

Taxono	my /	Collection / Co	v	ount		(Actions •
		Change Date	Туре	Changed To		Reason	Reported By
	G	Sep 13, 2018 08:26 AM	Colony Inventory Count	1		-	GREENVISC
	ω	Jun 15, 2006 12:00 AM	Taxonomy	<u>Gromphadorhina port</u> hissing cockroach	tentosa / Madagascar	-	GREENVISC
	Θ	Jun 15, 2006 12:00 AM	Animal Collection Change	Main Institution Anim	al Collection	-	GREENVISC

If you want to change the Colony Inventory Count for this one record for the entire history of the colony, highlight the Colony Inventory Count and select View/Edit Selected from the Actions menu. Record the desired count and Save. This will change the Inventory Colony Count for the entire history of the Colony. Because the change date is not noted it is a good idea to add a Note to capture that date.

Tax	konomy / Collectio	on / Colony Inventory Co	ount				
⊿	🕸 🚉 🤰 Sho	w All 👻			Actions •		
				8	Taxonomy Change Ever	ıt	
	Change	Date Type	Changed To	• 🔊	Collection Change Even	t	
	Jun 01, 2018 Colony Inventory Count		v Count 1		Colony Inventory Count Change Event		
	08:00		,	N	View/Edit Selected		
	😡 Jun 01, 20)18 Taxonomy	<u>Apis mellifera</u>	×	Delete Selected		
	00:00						
	😡 Jun 01, 20	018 Animal Collection	n Main Institut	on Ani	mal - G	GREENVISC	
	00:00	Change	Collection				

If you want to change the Colony Inventory Count for one record for a part of the colony history, select the Colony Inventory Count Change Event from the Actions menu.

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٦	axo	nomy /	Collection / Col	ony Inventory Count			
	4		Show All	~			💫 Actions 🗸
					8	Taxonomy Change Event	
			Change Date	Туре	Changed To	8	Collection Change Event
		0	3	Calany Inventory Count	1	N	Colony Inventory Count Change Event
			08:00	Colony Inventory Count	1	N	View/Edit Selected
	Ľ	G	Jun 01, 2018 00:00	Taxonomy	<u>Apis mellifera</u> ,	×	Delete Selected
		G	Jun 01, 2018 00:00	Animal Collection Change	Main Institutio Collection	n Ani	mal - GREENVISC

Instead of simply changing the count, this approach retains the original count and adds the new one. There is no need to add an additional Note because the change date is captured.

Tax	conomy /	Collection / Colo	ny Inventory Count				
⊿	\$	Show All	•				Actions -
	Change Date		Туре	Changed To		Reason	Reported By
	Q	Jun 06, 2018 08:00	Colony Inventory Count	2		-	GREENVISC
	9	Jun 01, 2018 08:00	Colony Inventory Count	unt 1		-	GREENVISC
	9	Jun 01, 2018 00:00	Animal Collection Change	Main Ins Collectio	titution Animal n	-	GREENVISC
	G	Jun 01, 2018 00:00	Taxonomy	<u>Apis mel</u>	lifera / Honeybee	-	GREENVISC

If you want to record an updated estimated Group Count of the members in the colony you can do so in the Census Info grid by selecting Add New from the Actions menu. This number will not be reflected in your inventory, that will remain the count you entered for Colony Inventory. The Group Count will update in the My Transactions grid. This number will not be updated when Partial Transactions are entered because it is a colony.

Ce	ensus Info												
⊿	1	NE 구	🔊 Actions 🗸										
	-	1.0.0.T	Ŀ	Add New									
	Ira	ick By Sex Typ	e Track By Li	fe Stage	L	Colony	Show of	1	View/Edit Selected				
		Census Date	Census Event	Total Count	Sex Track	L5 Track	Method	×	Delete Selected				
	Θ	Jun 07, 2018 09:04	Census	0.0.750	×	×	Undetermined	-	GREENVISC				
	•	Jun 01, 2018 00:00	From Another Institution (0.0.500)	0.0.500	×	×	Undetermined	-	GREENVISC				

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Part of the design of colonies in ZIMS is that the Colony Inventory Count will never get down to zero if a Partial Disposition is used. This allows you to split your honeybee colony into two or take a coral fragment from the origin coral. The Colony checkbox is available in the Split a Group allowing you to split an actual group out of a Colony or split another Colony out of a Colony.

Below we generated a fragment from our staghorn coral colony.

Statistic	Statistics H5V18-00157/Acropora nasuta 🖲												
Details	Details More Details Note & Observation 2 Major Life Event My Transactions												
2 🕂	🤣 💠 Add Transaction 🗸 🛃 Save All Changes 崎 Undo Remove 📓 Export to Excel 🏆 Export to PDF												
	Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status	Census					
٠	May 27, 2018 0	From Another Institution	YES	YES	Donation From(Physical and Ownership): Sender: PUBLIC /	Owned	On Site	0.0.1					
	Jun 07, 2018 12	Split A Group Out Of This Group	NO	NO	Split Group: HSV18-00158	Owned	On Site	0.0.1					

The Colony Inventory Count of "1" remains, even though we did a Partial Disposition of "1" to generate the fragment.

1	Cei	nsus	Info								
		Tra	ck By Sex Typ	Track By Life	Stage X	V	Colony	Show	only	my records	
			Census Date	Census Event	Total Count	Sex Track	L5 Track	Method	RP	Reported By	
		G	Jun 07, 2018 12:00	Split A Group Out Of This Group (0.0.1)	0.0.1 👫	×	×	-	-	GREENVISC	
		•	May 27, 2018 00:00	From Another Institution (0.0.1)	0.0.1 👫	×	×	Undetermined	-	GREENVISC	

Some things to note:

- If you split a colony out of a colony the count in My Transactions and Census count will NOT change
- If you split a group out of a colony the count in My Transactions and Census count will NOT change
- The only way that you can change the member count of a colony is to record a new census or a Full Disposition Transaction
- If you split a colony out of a colony you must still record a Group Count, even if it is the same as your Colony Inventory Count

The Detailed Inventory Report has a line for your colony count.

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Gromphadorhina portentos	a					Madagasca	r hissing cockroach
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.29	0.0.0	0.0.5		0.0.0	0.0.0	0.0.34
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Carausius morosus							Walkingstick
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.113	0.0.0	0.0.0		0.0.0	0.0.0	0.0.113
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Apis mellifera							Honeybee
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Colonies	0.0.0	0.0.0	0.0.1		0.0.0	0.0.0	0.0.1

The Summary Inventory simply notes when colonies are included in the row.

	ataribarat tararitara						
Latrodectus mactan	as Black widow spider	0.3.0	0.0.0	0.0.0	0.1.0	0.0.0	0.2.0
Gromphadorhina portentosa *	Madagascar hissing cockroach	0.0.29	0.0.0	0.0.5	0.0.0	0.0.0	0.0.34
Carausius morosus	* Walkingstick	0.0.113	0.0.0	0.0.0	0.0.0	0.0.0	0.0.113
Apis mellifera +	Honeybee	0.0.0	0.0.0	0.0.1	0.0.0	0.0.0	0.0.1
Archispirostreptus	 Giant African millipede 	0.0.11	0.0.0	0.0.0	0.0.0	0.0.0	0.0.11
Archispirostreptus	gigas *Giant African millipede	0.0.17	0.0.0	0.0.0	0.0.0	0.0.0	0.0.17
TOTAL		0.6.183	0.0.0	0.0.6	0.1.1	0.0.0	0.5.188
* = Group Inventory C ** = Colony counts inc + = Both Group and C	Counts Included In Row cluded in Row Colony counts included in Row						

More help on Colony/Groups: <u>Colony Inventory Count Vs Group Count</u> <u>Group Help Topics</u>

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