
STUDBOOK ADMIN ROLE IN ZIMS

Both Regional Association and Institutional studbooks need to have at least one Studbook Admin assigned. This document covers the responsibilities of this role.

Contact support@Species360.org

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Studbook Admin Overview

Studbook Admins have access to all studbook functionalities. The first Studbook Admin must be assigned by Species360 at the regional or institutional level, depending on the studbook scope. A designated Studbook Admin can then assign additional Studbook Admins as needed.

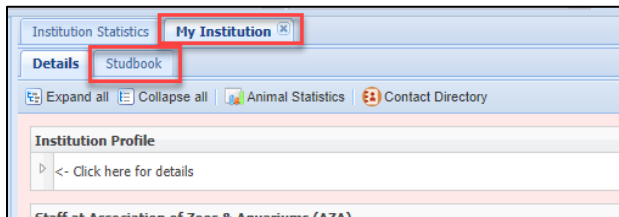
Studbook Admins have access to:

- From the Studbook tab
 - Studbook List
 - Studbook Keeper Newsfeed (limited to Regional Association studbooks)
 - Studbook Roles
 - Administration List
- From the Start Menu
 - Studbook Keeper List
 - Studbooks
 - Studbook Charts
 - Data Entry Monitor

Studbook Admin responsibilities include:

- Creating and Managing Studbook Roles
- Assigning people to Studbooks
- Assigning access to Studbook News Feed (Regional Association studbooks only)
- Requesting Studbook migration into ZIMS (existing studbooks in SPARKS or PopLink)
- Requesting ZIMS download for new studbooks

All Studbook Admin functions are performed from the Studbook tab. To find this tab, open My Institution from either the Institution Search desktop icon or Start > Institution > My Institution. If you do not see the tab, you will need to be added to the Administration list by Species360 or an existing Studbook Admin for your Regional Association or Institution.

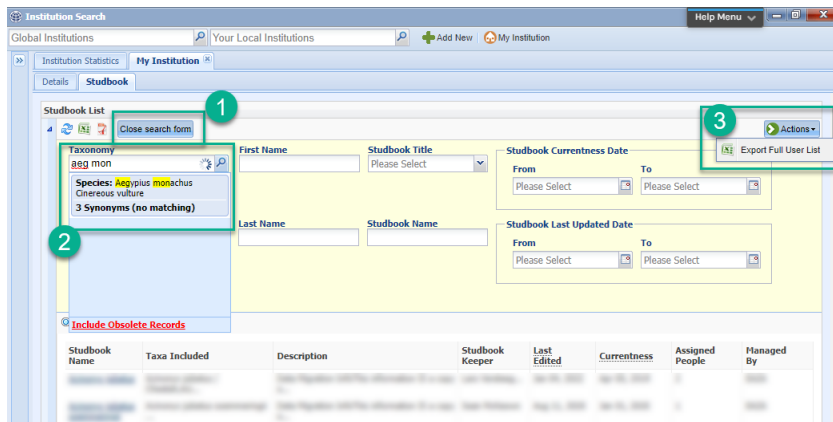


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Studbook List

The Studbook List displays all the studbooks managed by the Regional Association or Institution that have migrated to ZIMS. If you are a Regional Association you will not see Institutional Studbooks that are in your region. If you are an Institution you will not see Regional Association studbooks your institution maintains unless you are the Studbook Keeper. You can request access to these studbooks from the Institution/Regional Association that manages them.

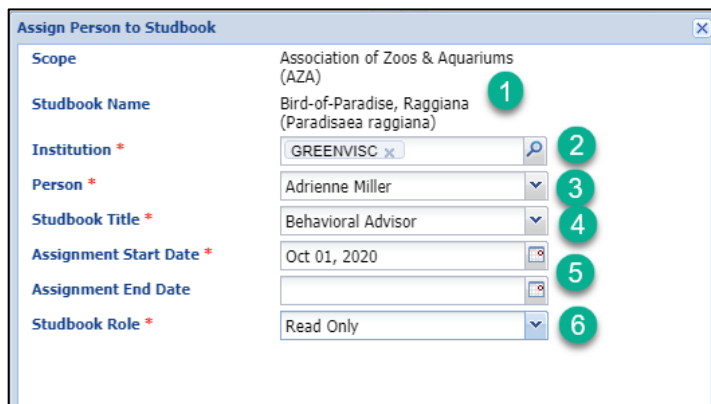
To search for specific Studbooks, use the Show Search Form button (1) in the upper left. When searching by Taxonomy (2), ZIMS can find partial matches. For example, if you type *Aeg mon* it will find *Aegyptius monachus*. To export a list of users assigned to the studbooks to Excel, click Actions, Export Full User List (3).



The Studbook Name column is a hyperlink to details on the Studbook:

- Studbook Profile
 - Total Specimens in Studbook
 - Currentness Date (date the Studbook Keeper felt the studbook data was “complete”)
 - Studbook Start Date
 - Last Edited (when data was last entered)
- Taxonomy Details
 - Gestation/Incubation Periods
 - Max Birth/Hatch Range for Litters/Clutches
- Studbook Assignments
 - People assigned to the Studbook (examples: Studbook Keeper, Institutional Liaison, Vet Advisor)

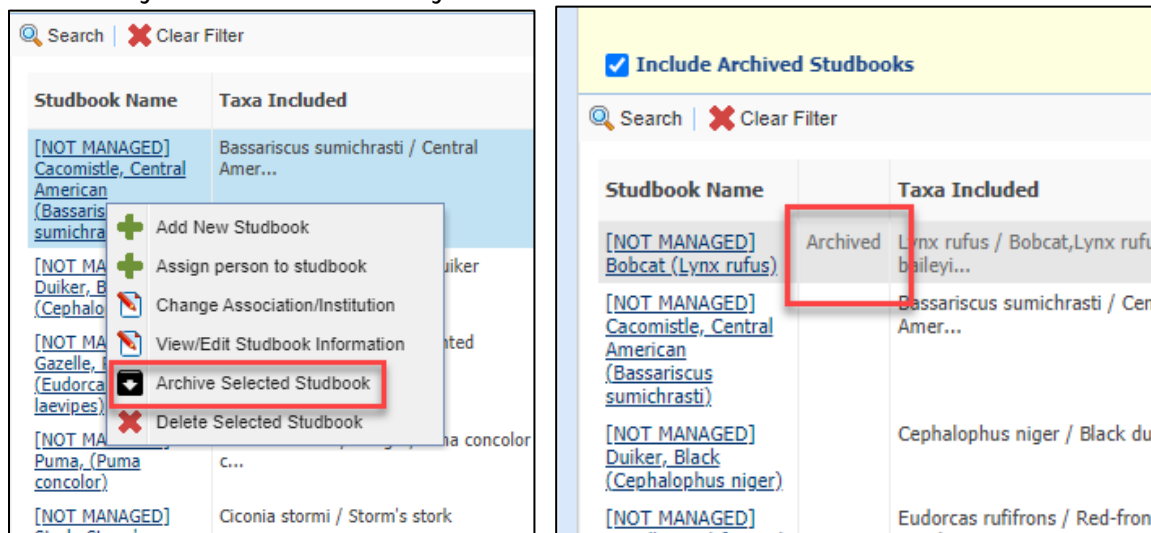
From the Studbook Assignments grid in the details, you can assign people to the studbook from Actions > Add New. You can also assign people to the studbook from the Studbook List by highlighting the studbook > Actions > Assign Person to Studbook.



1. The Scope and Studbook Name will prefill and is not editable.
2. Record the Institution or Regional Association of the person you are assigning. You can assign access to people from any region or institution, it does not have to be limited to your region or institution.

3. Only persons associated with the Institution or Regional Association you entered in #2 above will display for selection.
4. The Studbook Title is a multiple select drop down list.
5. The Start Date should be the date the Studbook was approved for the Studbook Keeper or the date that other positions were assigned.
6. The Studbook Role is a single select drop down from the Roles you have created. See [Studbook Roles](#) for details.

If a studbook is no longer being managed or in use, it can be archived from the active list. To archive a studbook, right click on it and select Archive Selected Studbooks. Archived studbooks can be viewed by checking the Include Archived Studbooks box in the search form. They will be identified by an Archived column.



An Archived studbook can be made active again by right clicking on it and selecting Unarchive Selected Studbook. It will now display in the active list.

Some things to note about Archived studbooks:

- If you export the studbook list with the Include Archived Studbooks box checked the column will be in the export.
- All Archived studbooks can still be accessed by the Studbook Administrator and any users that are assigned an active role.
- If you do not want anyone accessing the studbook, then all assignments should have an end date.
- Any Archived studbooks will not display in the Studbook Global Search tool. If it is Unarchived, it will display in the tool.

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Studbook Keeper Newsfeed List

The Studbook Keeper News Feed is only accessible for Regional Association studbooks. The News Feed allows Studbook Keepers who have not yet migrated to ZIMS to view recent additions or edits to their studbook at the institutional level. Use the Studbook Keeper Newsfeed grid to give access to view this. Studbooks that have migrated have access to this information in Suggested Animals and Pending Updates, so they do not have to be listed here.

Full Name	Institution	Taxonomy	Include Taxon Below	Effective Date	Actions
Erika Fronk	Species360	Rhynchopsitta pachyrhyncha/Thick-billed parrot	✓	May 01, 2017	Assign New Studbook Keeper
Katelyn Mucha	Species360	Odocoileus/White-tailed/mule deer	✓	Apr 04, 2017	
ISIS Technical Support	Minnesota Zoological Garden	Anaxyrus baxteri/Wyoming toad	✓	Feb 01, 2017	
Erik Beck	Mesker Park Zoo	Canis rufus/Red wolf	✓	Jan 20, 2017	
Yesaneh Hunt	Species360	Canis rufus/Red wolf	✓	Jan 20, 2017	
Adrienne Miller	Greenville Zoo	Macropus rufogriseus rufogriseus/Red-necked wallaby	✓	Nov 01, 2016	
Alexandra Zelazo-Kessler	Chicago Zoological Park / Brookfield Zoo	Ptilinopus jambu/OBSOLETE: Use Ramphoculus jambu / Jambu fruit-dove	✓	Sep 14, 2016	
Fred Kromm	Tracy Aviary	Lybius dubius/OBSOLETE: Use Pogonornis dubius / Bearded barbet	✓	Sep 14, 2016	
Mark Wannier	Saint Louis Zoological Park	Montivipera raddei/Radde's rock viper	✓	Sep 14, 2016	
Seth Groesbeck	Rosamond Gifford Zoo at Burnet Park	Ovis orientalis/Mouflon	✓	Sep 14, 2016	

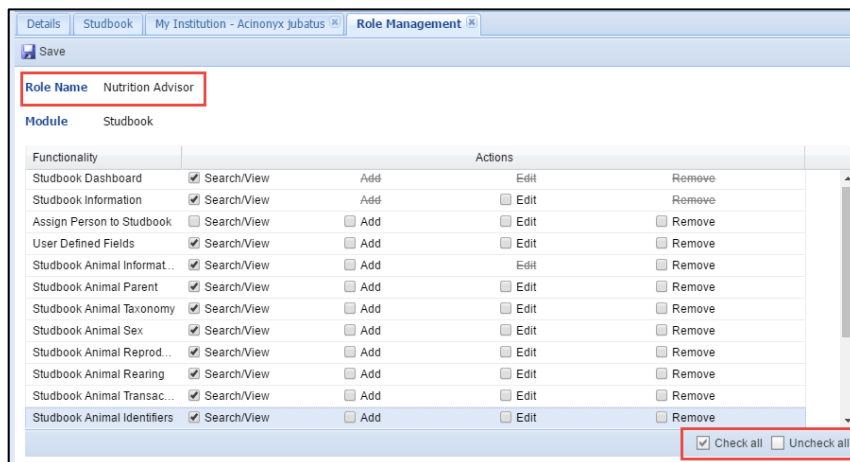
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Studbook Roles

Studbook Admins are charged with creating their own Role access for their studbooks. These Roles are across the board for all studbooks they manage. To create a Role, from the Studbook Roles grid go to Actions > Add New Role.

The Role Name must be unique. It may be easier to name the Role the same as one of the Studbook Title options available when assigning a User to the Studbook. The functionality to allow Studbook Keepers to assign Roles to their own studbooks is not yet developed and this remains the responsibility of the Studbook Admin.

You then need to create ZIMS access for this Role. To do this, highlight the Role and select Actions > Manage Role Access.



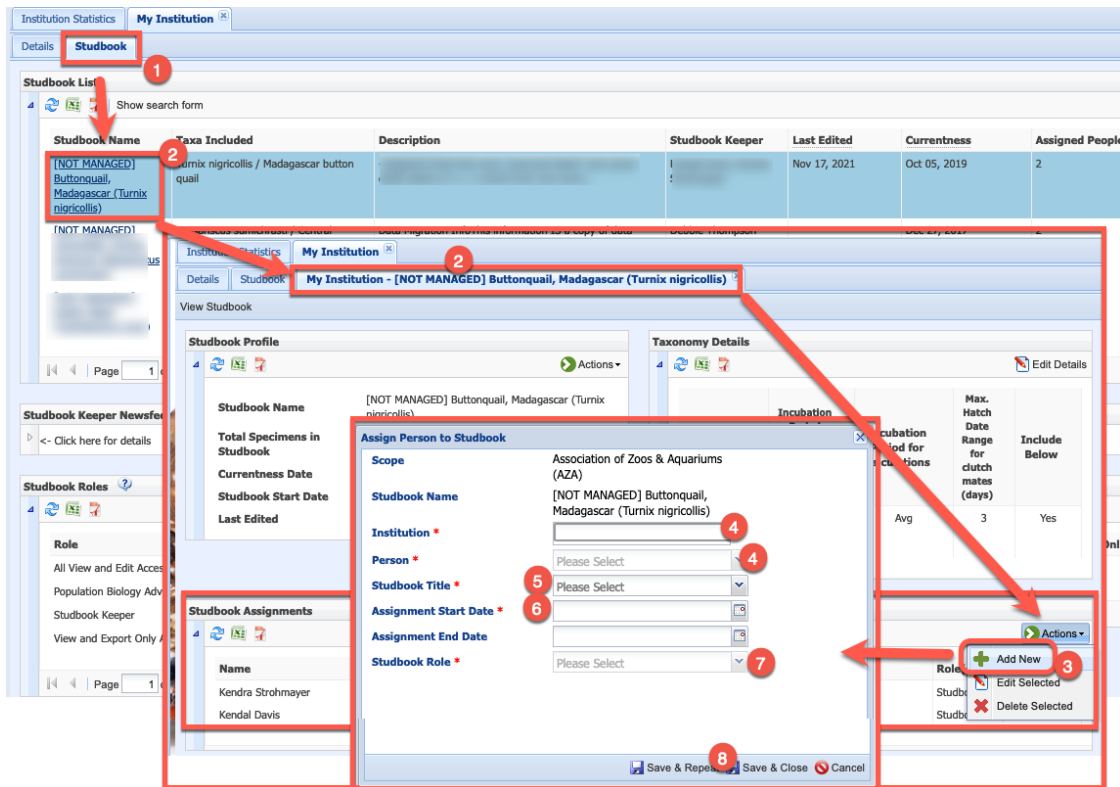
Here we are assigning the Role access for our Nutrition Advisor. Access is provided by Search/View, Add, Edit and Remove. We do not want our Nutrition Advisor Role to be able to add or change any data, so we have given only Search/View access to the topics we feel are relevant to this position. The option to quickly check or uncheck all boxes is available.

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Assigning a Studbook to a Keeper

Once you have your roles defined you can now assign a studbook keeper to an existing studbook. Note, if the studbook keeper does not have an existing ZIMS user account (registered under their host organization), [you can have them added under the association's 'staff list'](#) – this is useful for situations where their host institution is not a Species360 member.

1. From the Studbooks Admin tab
2. Click into the studbook you wish to manage, this will open as a new tab
3. From the Studbook Assginments grid, choose 'Actions -> Add New'
4. You will be required to select the hosting **Institution** first, this will populate the **Person** list from their existing ZIMS user list.
5. A **Title** is required
6. An assignment **Start Date** is required – End Date is not required, but can be helpful when looking back on the previous assignments for the specific book
7. Select a **Studbook Role** (already defined by your team) from the list
8. You can **Save & Close** for one entry or **Save & Repeat** to add more assignments



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Administration List

As mention in the Overview, Species360 will need to assign the initial Studbook Admin. Thereafter, any Studbook Admin can add additional Studbook Admin. From the Administration grid select Actions > Add New Admin. The people available to select from is sourced from your Institution or Regional Association staff list.

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Viewing Studbook Data

To look at the actual Studbook data go to Start > Studbook > Studbooks. You can drag this icon to the desktop if you find you are opening Studbooks frequently. A list of all the Studbooks managed by your Regional Association or Institution will display. If you are a Studbook Keeper, those Studbooks will display at the top of the list. You may see additional Studbooks outside of your Regional Association or Institution if you were assigned to them by their Studbook Admins. The number of Living Animals, Animal Records with Updates (this means the institution has made updates not yet accepted into the studbook) and Suggested Additions (possible new animals for the Studbook) is displayed.

My Studbooks

There are no pinned studbooks

ALL STUDBOOKS [Show Advanced Search](#)

Studbook Name	Living Animals	Animal Records with Updates	Suggested Additions
Acinonyx jubatus <small>ACA 2 institutions hold 2037 animals Acinonyx jubatus / Cheetah</small>	377	1668	125
Afropavo congensis <small>WAJA 48 institutions hold 1478 animals Afropavo congensis / Congo peacock</small>	80	774	536

Select the Studbook Name to open the actual studbook.

Search animals by ID/GAN **STUDBOOKS** Hello Adrienne Miller

Podargus strigoides
665 Studbook Animals (257,205,203)
117 Institutions / Currentness Date: 03/12/2019

1 Studbook Activity

2 Overview: 181 Living Animals in Studbook, 664 All Animals In Studbook, 66 Suggested Animals, 440 Pending Updates

3 Institutions

4 Data Quality: 14 High Priority, 11 Medium Priority, 10 Low Priority

5 View List

Recent Activity:

- #1022 Undetermined, 0Y,0M,6D, Dead, SANDIEGOZ. Katelyn Mucha edited Rearing record. 5months
- #1022 Undetermined, 0Y,0M,6D, Dead, SANDIEGOZ. Katelyn Mucha rejected Rearing record. 5months
- #1841 Undetermined, 0Y,7M,11D, Alive, GREENVIC. Katelyn Mucha added Note record. 5months
- #E108 Female, 2Y,7M,2D, Alive, ORLANDO. Katelyn Mucha saved DRAFT 8 to Studbook. 5months
- #E108 Female, 2Y,7M,2D, Alive, ORLANDO. Katelyn Mucha added Rearing record. 5months
- #E108 Female, 2Y,7M,2D, Alive, ORLANDO. Katelyn Mucha edited Parent/Taxonomy record. 5months
- #E108 Female, 2Y,7M,2D, Alive, ORLANDO. Katelyn Mucha added Transaction record. 5months
- #E108 Female, 2Y,7M,2D, Alive, ORLANDO. Katelyn Mucha added Sex Information record. 5months

1. On the right is recent activity recorded in the studbook
2. The Overview will display a brief description of the studbook
3. Institutions will take you to the list of Institutions for that studbook
4. You can also view the Data Quality issues for the studbook
5. Selecting the View List button will take you to the results grid for that topic

Select filter

Date Filter

Start Date: End Date: 02/15/2017 As of End Date Date Range No Restriction

Status: Sex Type: Female Breeding: Has not breed Transaction:

Birth Type: Rearing: Hand Parent: Between Ages:

Studbook Id: All Numerical Not Numerical [Add Udf Filters](#) [Add Institution Filters](#)

Search Reset

Studbook ID	GAN	Current L...	Current L...	Sex Type	Birth Date	Current S...	Sire	Dam	Age	Taxonom...
C1	TQC14-009...	FOSSILRIM	1207	Male	Oct 01, 20...	Alive	6473	8084	2Y,4M,14D	Acinonyx...
C10	BTJ14-000...	SD-WAP	615391	Male	Sep 01, 20...	Alive	6939	7828	2Y,5M,14D	Acinonyx...
C11	BTJ14-000...	SD-WAP	615390	Male	Sep 01, 20...	Alive	6939	7828	2Y,5M,14D	Acinonyx...
C20	KNV13-001...	HEMMING...	M0017	Female	Apr 11, 20...	Alive	UND	UND	4Y,10M,4D	Acinonyx...

We selected to view Living Animals in the studbook. A list of the studbook animals will display. Above the list is an expandable search box to help you find animals that match specific filters. If there are searches that you run frequently you can create as preset filter. The Studbook IDs are hyperlinks into the record.

Acinonyx jubatus > Living Animals > SB#C1

SB#C1 1207

Acinonyx jubatus / Cheetah GAN TQC14-00905 2 Updates Unlink

Alive FOSSILRIM 2Y 4M 14D / No Male Dam: 8084/FOSSILRIM Sire: 6473/FOSSILRIM

Local ID/House Name Birth Type Birth Date/Est Rearing Type Est. Conception

1207 / Bud Captive Born Oct 01, 2014 Parent Jul 03, 2014

Transactions 2

Parent

Taxonomy

Sex









Rearing

Type	Start Date	End Date	Reported By
Parent	Oct 01, 2014		Data Migration Process

Contraception

Use the arrows to expand the various grids to view the data recorded.

My Studbooks

	LIVING ANIMALS	ANIMAL RECORDS WITH UPDATES	SUGGESTED ADDITIONS	
 Acinonyx jubatus <small>AZA 2 Institutions hold 2387 animals Acinonyx jubatus / Cheetah</small>	377	1668	125	
ALL STUDBOOKS <input type="text" value="Find in studbooks"/> <input type="button" value="Show Advanced Search"/>				
 Afropavo congensis <small>WAZA 48 Institutions hold 1478 animals Afropavo congensis / Congo peacock</small>	80	774	536	
 Agouti <small>AZA 0 Institutions hold 0 animals Dasyprocta / Agouti</small>	0	0	66	
 AJAIA AJAJA <small>AZA 116 Institutions hold 2629 animals Ajaja ajaja / Roseate spoonbill</small>	596	1610	470	

If there is a Studbook that you access frequently you can “pin” it to the top of the list by selecting the pushpin icon. Pinned Studbooks load faster for your convenience.

Staff at Toledo Zoological Gardens

Full Name	Job Title / Type	Roles	ZIMS User	Public Contact
Chuck Cerbini	Curator Birds / Curat...	Curator Birds, Curator Me...	✓	✓
Jay Hemdal	Curator of Fishes and...	Curator Medical, Local Ad...	✓	✓
Jeff Sailer	Director / Director	Curator Medical, Guest (A...	✓	✓
Juan Romero	Associate Curator of ...	Curator - [TOLEDO], Curat...	✓	✓
Kirsten Thomas	Associate Veterinaria...	Associate Vet Medical, Ve...	✓	✓
Monica Blackwell	Associate Curator Bir...	Curator Birds, Curator Me...	✓	✓
Peter Tolson	Director of Conservat...	Keeper TZ	✓	✓
R. Andrew Odum	Assistant Director of...	Curator - [TOLEDO], Curat...	✓	✓
Randi Meyerson	Assistant Director of...	Curator - [TOLEDO], Curat...	✓	✓
Ric Berlinski	Chief Veterinarian / ...	Vet - [TOLEDO], Veterinar...	✓	✓
Terry Webb	General Curator / Cur...	Curator - [TOLEDO], Curat...	✓	✓
Wyn Hall	Registrar / Species36...	Local Admin, Medical Admi...	✓	✓

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You may need to find a Local Admin at another Regional Association or Institution to request access to their studbook or request they create an account for someone you want to gain access to your studbook. To find who is the Local Admin at another facility you will search for that institution and open the Staff grid. Look for who is assigned the Role of Local Admin. Remember that not all institutions make their Staff globally visible.

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Data Entry Monitoring

Data Entry Monitoring (DEM) allows you to view recent studbook entries. Go to Start > Security Tools > Data Entry Monitoring. All studbooks that are in your studbook list will display to select from. You can add additional filters such as who entered the data, date range, record type and action (add, edit, delete) type if desired.

Data Entry Monitoring

Log In History | Search Results

Undo Selected

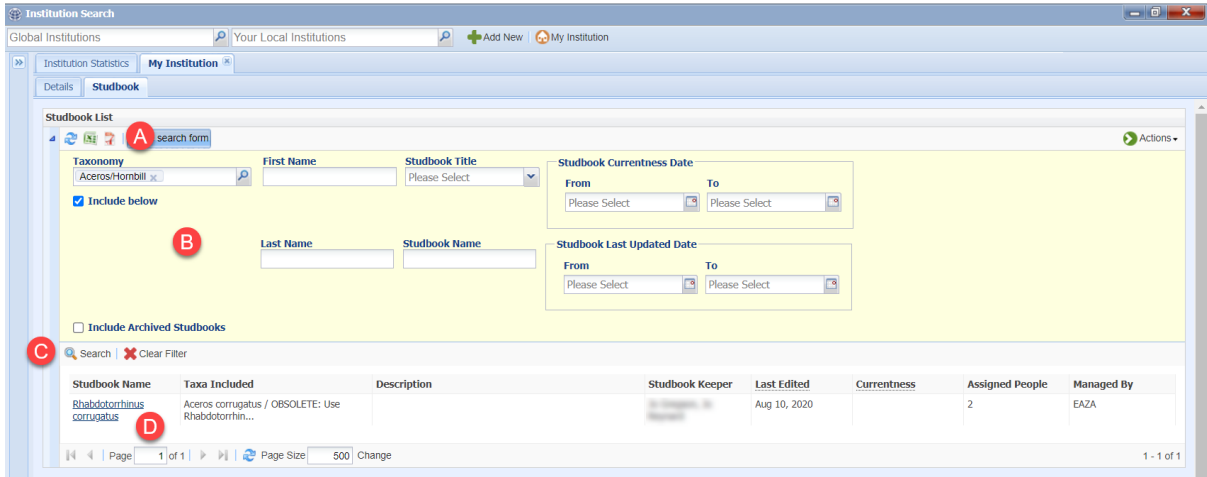
Institution/Studbook	Date Time	ZIMS User	Record Type	Details	Rolled Back
GREENVISC - sun conure	Oct 19, 2020 14:47	Adrienne Miller	Studbook Animal Sex Info...	Added Studbook Animal Sex Information record for DRAFT 4, sun conure in studbook DRAFT 4, sun conure	
GREENVISC - sun conure	Oct 19, 2020 14:46	Adrienne Miller	Studbook Animal Rearing	Added Studbook Animal Rearing record for DRAFT 4, sun conure in studbook DRAFT 4, sun conure	Oct 19, 2020 14:53 Adrienne Miller
SANDJIEGOZ - Leptailurus serval 02	Oct 19, 2020 14:46	Adrienne Miller	Studbook Animal Taxono...	Added Studbook Animal Taxonomy Information record for DRAFT 4, sun conure in studbook DRAFT 4, sun conure	
GREENVISC - sun conure	Oct 19, 2020 14:46	Adrienne Miller	Studbook Animal Transact...	Added Studbook Animal Transaction record for DRAFT 4, sun conure in studbook DRAFT 4, sun conure	
GREENVISC - sun conure	Oct 19, 2020 14:46	Adrienne Miller	Studbook Animal Transact...	Added Studbook Animal Transaction record for DRAFT 4, sun conure in studbook DRAFT 4, sun conure	
GREENVISC - sun conure	Oct 19, 2020 14:46	Adrienne Miller	Studbook Animal Parent I...	Edited Studbook Animal Parent Information record for sun conure, DRAFT 4 in studbook sun conure , DRAFT 4	

Sometimes an inexperienced Studbook Keeper may record some data incorrectly or record correct data in the wrong record. Or, they may have accepted or rejected a Suggested Animal or Pending Update incorrectly. They do not feel confident that they can fix the data correctly. As Studbook Admin you can use DEM to “roll back” the entry. Simply highlight the entry and select Undo Selected. DEM will display the date the data was rolled back as well as who rolled it back. The entry will be removed in the studbook.

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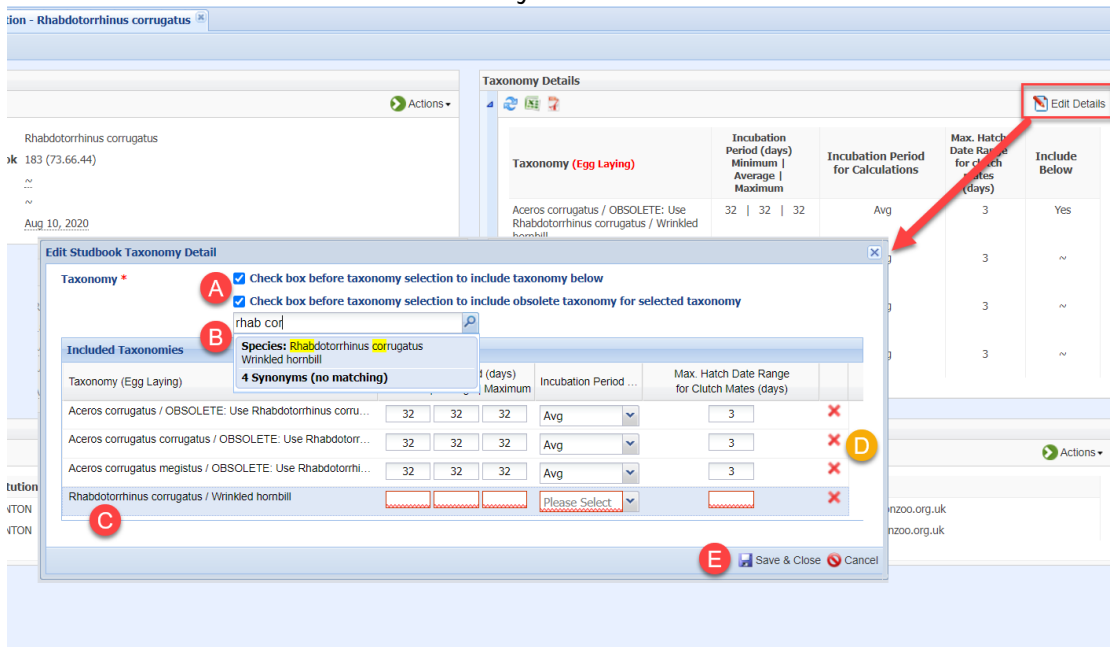
Adding and Editing Taxonomy

1. In the Studbook List:



- A. Open the search form.
- B. Use fields within the search form to find the studbook you are searching for.
- C. Click Search.
- D. Select studbook from list by clicking on the dark blue hyperlink in the Studbook Name Column.

2. Select Edit Details on the Taxonomy Details Box:



- A. Select the two checkboxes for 'check box before taxonomy selection to include taxonomy below' and 'check box before taxonomy selection to include obsolete taxonomy for selected taxonomy'.

-
- B. Type the scientific name you are searching for in the 'Search for Taxonomy' field, and select from the drop down list. Tip: you only need to type the first few letters of each word to get a match.
 - C. The taxonomy will now appear in the list below but with reproductive information missing (this will vary by taxa). Complete the information to match the other taxonomies listed.
 - D. There is an option to delete taxonomies with the red 'x' icons if needed.
 - E. Select 'Save & Close' to save any changes made.

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Things You are Not Responsible For

There are some things that you are not responsible for as far as managing studbooks. If a Studbook Keeper cannot log into ZIMS or if they do not have access to the Studbook Keeper List or Studbook Charts tell them to first check with their Local Admins as they may not have been assigned the proper ZIMS Role. If their Local Admin cannot help, have them contact support@Species360.org.

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