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 List
Studbook Keeper Newsfeed List
Studbook Roles
Assign Keeper/Biologist/Staff to Studbook
Administration List
Permit User Rights to Grant Access to Studbook Data & Guide for Studbook User on Granting Rights
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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.
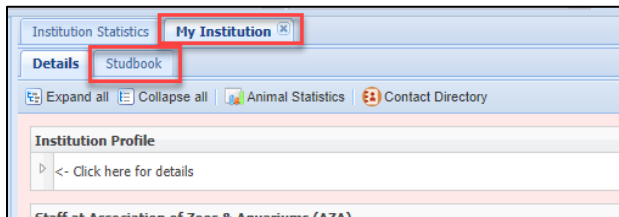
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Studbook List

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 *Aegypius monachus*.
To export a list of users assigned to the studbooks to Excel, click Actions, Export Full User List (3).
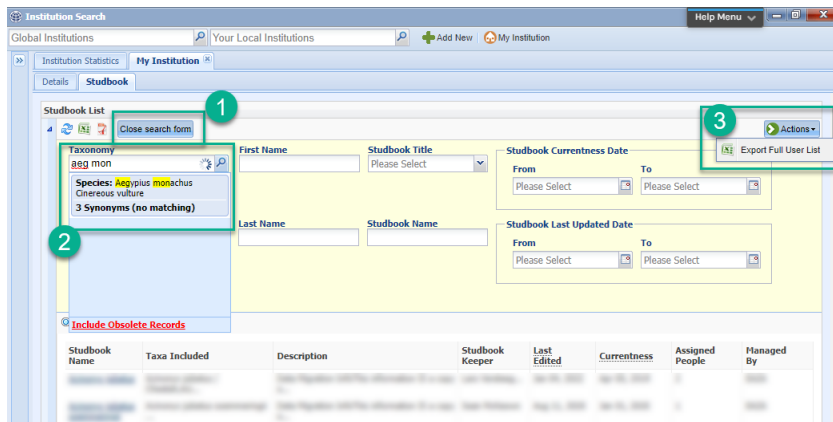
The Studbook Name column is a hyperlink to details on the Studbook:
- Studbook Profile
    - Total Specimens in Studbook
    - Currentness Date (date the Studbook Keeper felt the studbook data was "complete"
    - Studbook Start Date
    - Last Edited (when data was last entered)
- Taxonomy Details
    - 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.
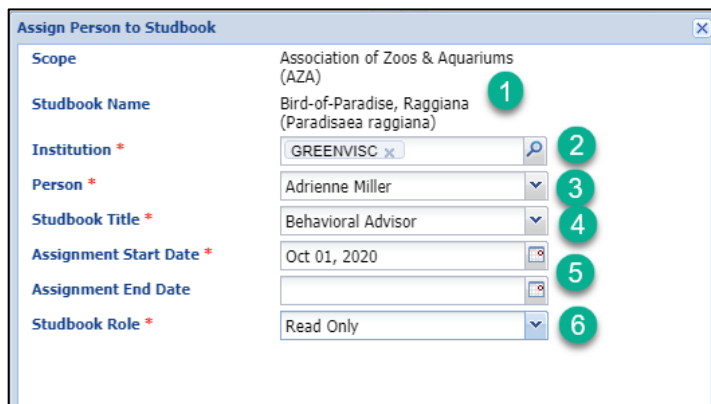
1. The Scope and Studbook Name will prefill and is not editable.
2. Record the Institution or Regional Association of the person you are assigning. You can assign access to people from any region or institution, it does not have to be limited to your region or institution.

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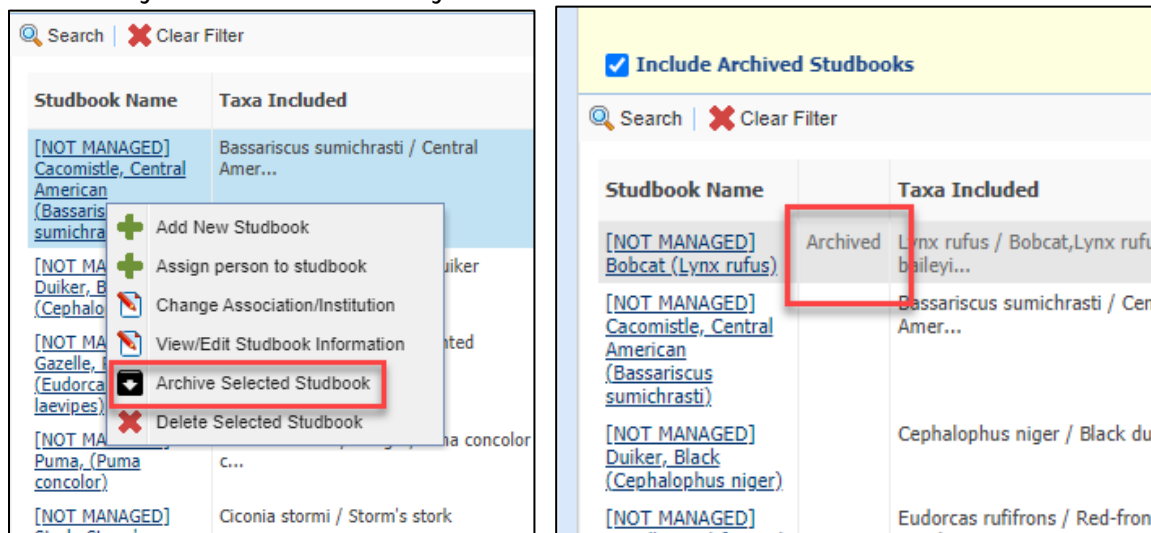
An Archived studbook can be made active again by right clicking on it and selecting Unarchive Selected Studbook. It will now display in the active list.

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.

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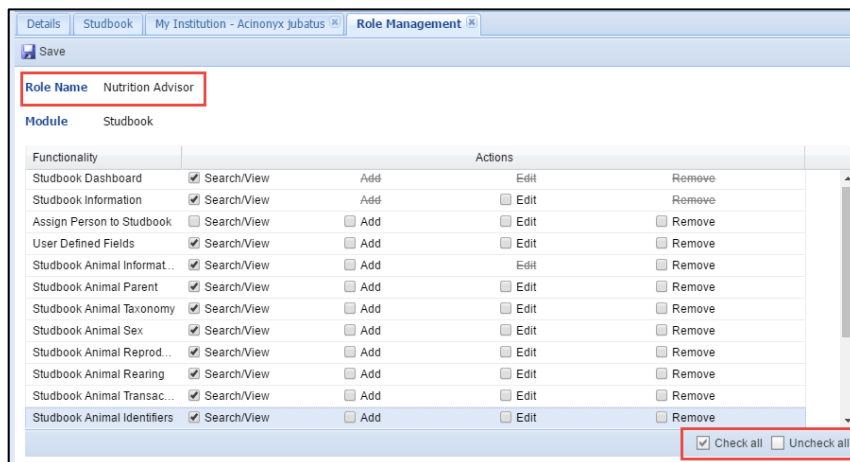
Here we are assigning the Role access for our Nutrition Advisor. Access is provided by Search/View, Add, Edit and Remove. We do not want our Nutrition Advisor Role to be able to add or change any data, so we have given only Search/View access to the topics we feel are relevant to this position. The option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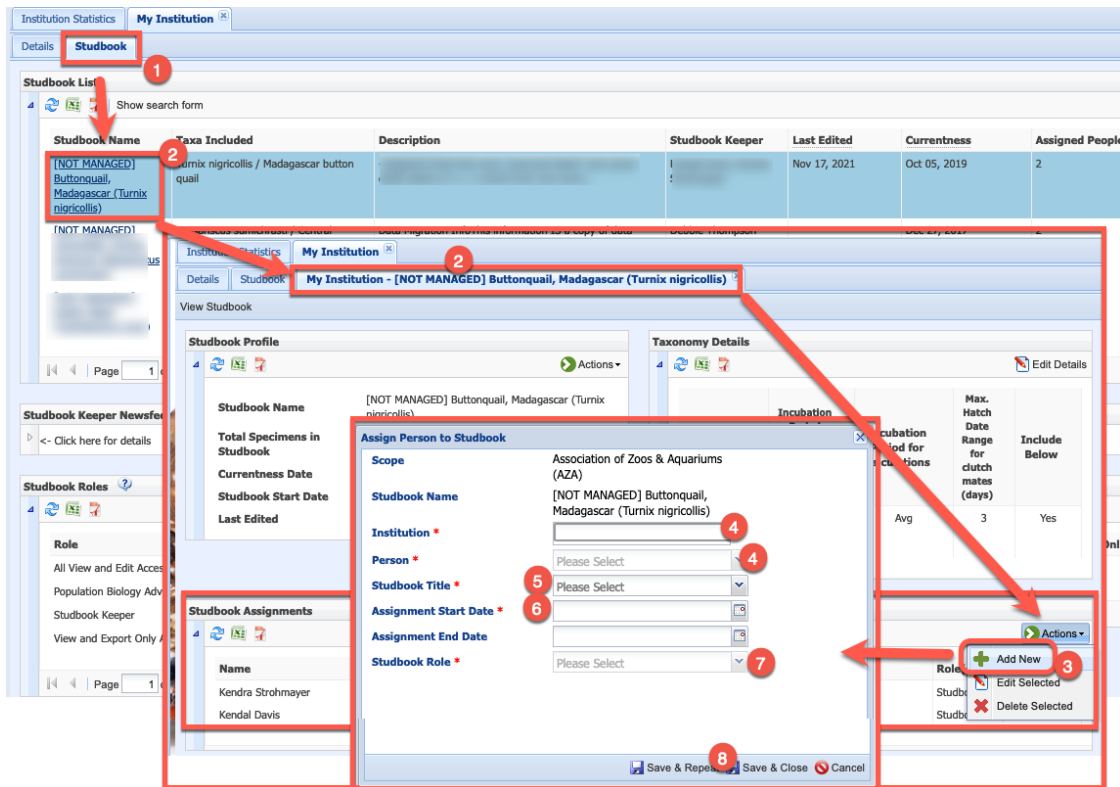
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Administration List

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.

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Select the Studbook Name to open the actual studbook.

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

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.

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

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.

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.

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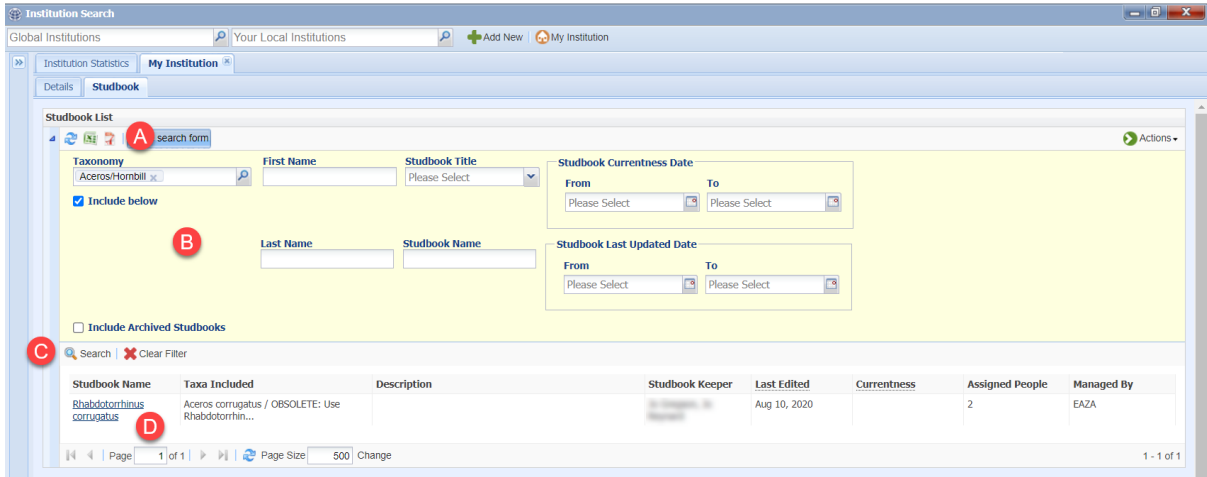
A. Open the search form.
B. Use fields within the search form to find the studbook you are searching for.
C. Click Search.
D. Select studbook from list by clicking on the dark blue hyperlink in the Studbook Name Column.

2. Select Edit Details on the Taxonomy Details Box:
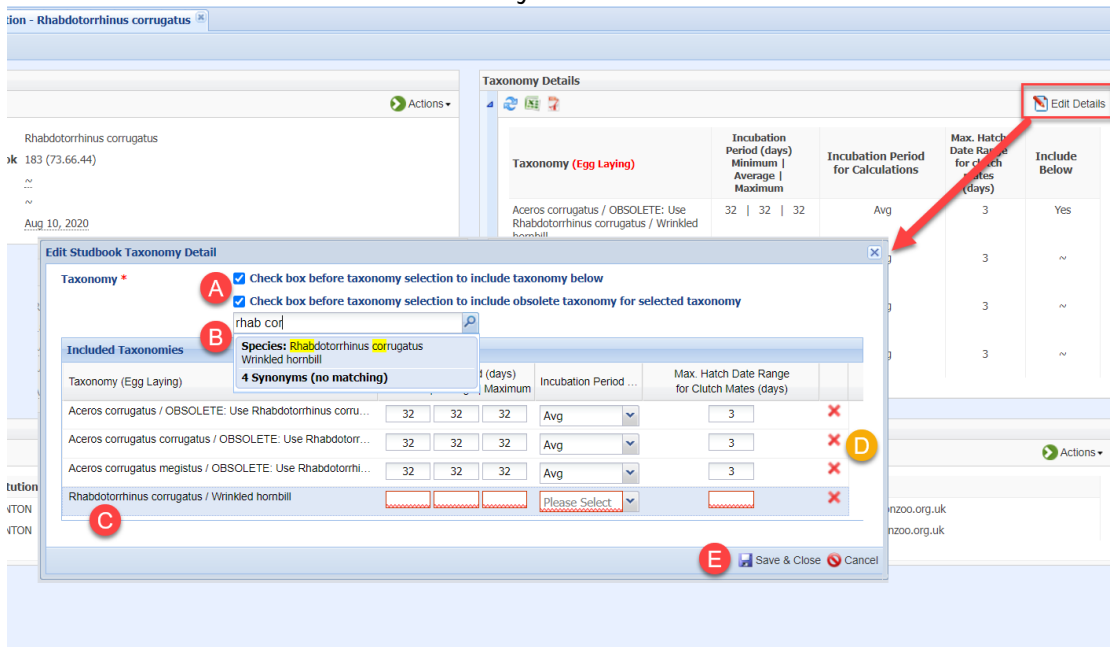
    A. Select the two checkboxes for 'check box before taxonomy selection to include taxonomy below' and 'check box before taxonomy selection to include obsolete taxonomy for selected taxonomy'.

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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