DATA MIGRATION TEMPLATE PROCESS

Contact Species360 Support

Welcome to ZIMS!

As a ZIMS user, you will be joining over 1000 institutions around the world in using the world class Zoological Information Management System application, contributing to global conservation through the collection of valuable data while managing your animal population's inventory, husbandry and medical records from one program.

Data migration templates were created to assist onboarding institutions with a low-cost, faster method of establishing their current collection information in the ZIMS application, allowing you to more quickly move forward with data entry. Institutions wishing to migrate historical information should contact their Species360 representative to inquire about a quote for more extensive migration work.

See quick tips guide: Quick Tips for Completing the Data Migration Template

To establish your collection in ZIMS using the Species360 data migration template, you will need to organize your collection information in the supplied Excel spreadsheet using this manual as a guide. Data migration templates can be used to establish the following information:

- Collections
- Enclosures
- Life Support Systems
- Life Support Components
- Current Animal Inventory

The migration process occurs as follows:

1. Species360 provides your institution with data migration template sheet, instructions and a quick tip document to help you avoid some common errors that slow down migration. In this Template Excel in Mac (Apple) is not supported.
2. Your institution submits completed template spreadsheets to their designated Species360 support representative. If multiple staff are completing the spreadsheets, please ensure all data is copied onto one template before submitting. Your institution must have entered your staff list for any responsible parties in ZIMS prior to data migration being run.

3. Species360 runs a test migration with the information provided. Any incorrect or missing information will be tagged with an explanation of how to repair the issue. Species360 will provide this information back to the your institution to make changes.
4. Your institution repairs any errors and resubmits their data.
5. Species360 reattempts data migration. This process may repeat until all data entry errors have been completed.

General Instructions

1.0 Upon opening the Excel migration spreadsheets, you should see a yellow bar across the top portion of the spreadsheet with a button option to ‘‘enable content’’ or ‘‘enable editing’’. You should select this button to enable content.

1.1 The data migration template sheets should be filled out in the following order to best assist you with pre-populated dropdown menus:

Order for Template Completion

1.Source Institution and Date Format

2. Collections

3. Enclosures

4.Life Support Systems

5.Components

6. Animals

Note: If your institution does not want any of these options migrated in, these sheets may be left blank.

1.2 Your institution should enter any staff that may be designated as a responsible party for an animal, enclosure, life support or component in the Staff section of the My Institution module in ZIMS. Any staff or team names entered into the Responsible Party columns must match the spelling used in the ZIMS application exactly.

1.3 Any column heading with an asterisk (*) following the title is a required field, and must have data entered unless the specific instructions for that column allow for a default setting if the fields are left blank. See specific column instructions in the following sheets for details.

	A	B	C	D	E
5	Enclosure Name*	Category*	Type*	Parent Enclosure	Water Type
6					
7					

1.4 Error code and Error Message columns should not be filled in. These columns will serve as a guide for you to fix any missing or incorrect data after the initial test migration has been run.

1.5 Data can be copied and pasted into the sheet if you have multiple staff filling out copies of the sheet. **Whole rows and columns cannot be copied and pasted; you must select the specific groups of cells for this function.**

- If using copy/paste to fill in template, ensure the terms used are valid entries from the dropdown menu on the specified column. Drop down Lists and Taxonomy List are available on the spreadsheet.

Source Institution and Date Format

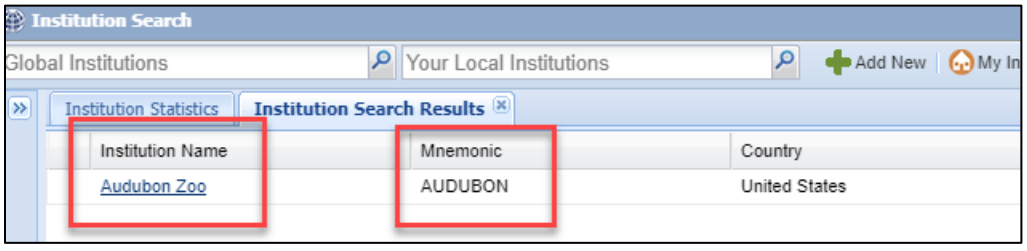
Note: This sheet should be completed before the Animal Template sheet.

This sheet will consist of institutions you have received any of your current animal collection from as well as the Date Format you will be using.

Column Instructions:

Mnemonic:

- This is a required field and must have data entered.
- To find the mnemonic go to Start > Institution > Institution Search.
- Type the Institution Name in the Name / Mnemonic / Synonym box. Select Search.



- The mnemonic is listed in the second column
- You can also use the Institution Name (K) and the Institution Mnemonic (L) in the Drop Down Lists sheet of the Data Migration Template to find the correct institution.

Institution Name:

- This is a required field and must have data entered.

- Follow the instructions above for mnemonic to find the institution.
- The Institution Name must be entered in the template exactly as it displays in ZIMS.

If the Institution cannot be found, submit the name and address to support@Species360.org so they can add it to the global institution list.

Date Format:

- This is a required field and must have data entered.
- ZIMS has many date formats available to select from. Make sure that you select one of these. You can set your default Date Format in ZIMS by going to Start > Institution > Institution Preferences > Language, Date/Time and Separator Formats.
    - d/M/yyyy = 28/3/2019
    - M/d/yyyy = 3/28/2019
    - dd/MM/yyyy = 28/03/2019
    - MM/dd/yyyy = 03/28/2019

Back to Order for Template Completion

Collections Template

Note: This sheet should be completed before the Animal Template sheet.

This sheet will consist of any animal collections you wish to track in ZIMS Collections define why you have the animal and can be used as filters for searches and reports. Primary Animal Collection is the default Collection and does not need to be entered. This sheet is not required if no additional collections are needed.

Column Instructions:

Collection Name

- This is a required field and must have data entered.
- Collection name must be unique within your institution.
    - Examples: "Education Collection", "Research Collection"

A	B
Collection Name*	Collection Type *
Education Collection	Education
Research Collection	Research

Collection Type

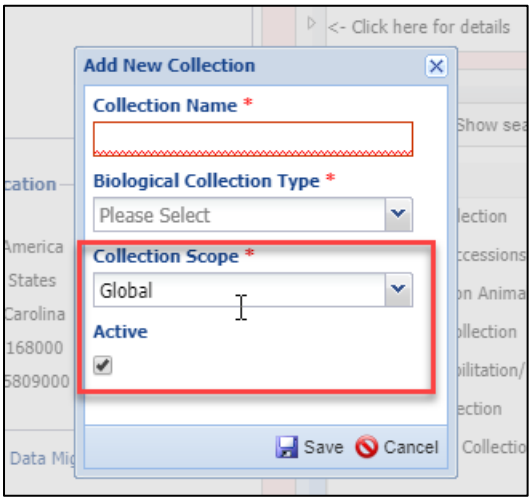
- This is a required field. A dropdown list of collection types has been provided. You must select one type from the following options:

Collection Type	Definition

Main Collection (default)	Your exhibit and breeding animals. In most facilities the majority of your animals will be in this collection.
Confiscation	Animals you are holding after they were removed from another holder, usually by a legal authority. Holding terms may be temporary, pending legal action.
Education	Animals used for education, off grounds presentations or on grounds educational programs
Feedstock	Animals held to be fed to other animals such as mice and rats or feeder fish. This collection can be marked as Local view only
Non-Institution Medical	Animals that are not managed by the institution, but are presented for medical treatment such as area wildlife or staff pets
Quarantine	May be used for animals during their standard quarantine period at your facility. May also be used for animals you are quarantining on behalf of another institution.
Rescue/Rehabilitation	Animals in from the wild temporarily housed for the purpose of rehabilitation for release back into the wild
Research	Animals used specifically for research. This collection can be marked as Local view only.
Temporary Holding	Holding temporarily for another institution or agency for reasons other than confiscation or rescue/rehabilitation
Wild	Animals that are part of a re-introduction program or that you want to track after release to the wild

Below is what the Add New Collection screen in ZIMS looks like.

- When adding a Collection directly into ZIMS you have the option to mark a Feedstock and a Research Collection Type as Local Scope which means only your institution will be able to see the animals assigned to it. By default, all Collections migrated from this Template will be Global Scope. Once migrated, you will be able to change the Scope for those two Collection Types if desired.
- By default, all migrated Collections will be Active.



Error Code and Error Message
You should not enter any information in these fields. These columns will provide an error code and corresponding details message for any data that is not entered correctly. These fields will be populated by Species360 after the initial test migration of data provided by the you.

Back to Order for Template Completion

Enclosures

Note: This sheet should be completed before the Life Support, Components, and Animals sheet.

This sheet will migrate in your list of enclosures. Species360 will automatically create a top-level parent enclosure that is your institution. Any enclosures entered into this template will become sub-enclosures of this parent enclosure.

Example 1: Sub-enclosures used as supporting enclosures. Sub-enclosures may share a water supply with the parent enclosure.

- Test Aquarium (Top level enclosure)
    - Freshwater Exhibit 1 (Sub-enclosure of Test Aquarium)
        - Freshwater Exhibit Holding 1 (Sub-enclosure of Freshwater Exhibit 1)

Example 2: Sub-enclosures used as parts of an exhibit. This facilitates animal management practices, such as shifting on/off display or separation of animals within the same enclosure.

- Test Zoo (Top Level enclosure)
    - Giraffe Exhibit (Sub-enclosure of Test Zoo)

- Giraffe Barn (Sub-enclosure of Giraffe Exhibit)
- Giraffe Corral (Sub-enclosure of Giraffe Exhibit)

Example 3: Enclosure groups used to create easy separation between animal areas or parts of an institution. Enclosure groups typically do not house animals but are an umbrella for a set of enclosures.

- Test Aquarium (Top Level enclosure)
  - Quarantine Building (sub-enclosure group of Test Aquarium)
    - Quarantine Room 1 (sub-enclosure group of Quarantine Building)
      - Seahorse Quarantine Tank 1 (sub-enclosure of Quarantine Room 1)
      - Seahorse Quarantine Tank 2 (sub-enclosure of Quarantine Room 1)
  - Research Building (sub-enclosure group of Test Aquarium)

Column Instructions:

Enclosure Name:

- This is a required field. Name must be unique within your institution.

Enclosure Category:

- This is a required field. Dropdown list has been provided; one category must be selected from list.

Category	Definition
Aquatic	An enclosure that contains only water or a majority of water in proportion to land. Water quality measurements can be recorded on it.
Terrestrial	The enclosure contains mainly land. Environmental measurements can be recorded on it. If there is a water feature it can be entered as a water body in the terrestrial enclosure details, but Water Quality measurements cannot be recorded on this water body.

Enclosure Type:

- This is a required field. The Enclosure Category drives what is available to select from. A dropdown list has been provided.

Category	Type	Definition
Aquatic		
	Aquarium	The most generic term for a structure that contains water
	Bin	Container open at top, often deep. May be made of plastic, metal or wood. Typically is portable and could be used as a holding enclosure for such animals as tortoises, baby birds

		or other animals that are unable to jump or climb out. Bin and tub are synonymous terms
	Building	The most generic term for a stationary structure with walls and a roof, typically divided into rooms, often with differentiated environmental parameters.
	Cage	A structure of bars, wires, or mesh that confines an animal
	Cave	Representative of a natural underground void, typically large enough for a human to enter. Includes flooded and sub-terranium caves.
	Enclosure Group	An assemblage of enclosures that may encompass other smaller Enclosure Groups associated with it. Enclosure Groups can be organized by location within the institution, teams, or zoo-geography and include exhibit and off-exhibit areas. An Enclosure Group may be a Parent enclosure with Child enclosures under it, or a Child enclosure under a Parent enclosure
	Exhibit	An enclosure where animals are displayed, usually to the public
	Floating Sea Pen	Floating ring with netting suspended below, used in open bodies of water
	House	A type of Building that contains multiple rooms that hold similar taxa
	Insulated Box	Insulated portable container often used for transporting invertebrates, reptiles, fish and amphibians. Typically made of plastic and/or styrofoam.
	Kreisel	Horizontal cylinder with a circular water flow keeping its inhabitants away from the sides and used primarily for the culture and display of soft-bodied, pelagic, species. Kreisel, pseudokreisel and stretch kreisel are synonymous terms.
	Lake	A large subterranean body of freshwater typically replenished by a permanent source of water
	Moat	Trench or channel typically filled with water and used as a barrier that surrounds all or part of an area
	Paludarium	An enclosure that contains both aquatic and terrestrial elements
	Petrie Dish	An enclosure that contains both aquatic and terrestrial elements.
	Pond	A shallow cylindrical glass or plastic lidded dish

	Pool	A small subterranean body of water typically replenished from the surface
	Test Tube	A structure containing water, typically above ground and frequently with underwater viewing
	Touch Tank	A small tube of glass, open at the top with a rounded bottom
	Vehicle	A touch tank is a body of water with marine animals where visitors/guests can gently touch and/or feed the animals by placing hands in the water.
	Vivarium	Used for transport and/or as temporary housing before or immediately following transport. Environmental controls are often present
	Wave Pool	A small, mostly terrestrial enclosure typically for the display of amphibians, reptiles, fish, insects, and/or plants.
Terrestrial		
	Aviary	Structure primarily holding or exhibiting flighted animals
	Barn	Walled building with a roof, typically divided into stalls and with a single set of environmental factors
	Beehive	A structure that provides a habitation for bees, as in a hollow tree, or a man-made receptacle
	Bin	Container open at top, often deep. May be made of plastic, metal or wood.Typically is portable and could be used as a holding enclosure for such animals as tortoises, baby birds or other animals that are unable to jump or climb out. Bin and tub are synonymous terms
	Box	Container, usually six sided and with the ability to close the top, not as sturdy as a crate, often temporary but can be used for long-term housing for small animals, typically made of cardboard or plastic. Box and shoebox are synonymous terms
	Brooder	Small container with environmental control, used for the rearing of young animals, especially birds
	Building	The most generic term for a stationary structure with walls and a roof, typically divided into rooms, often with differentiated environmental parameters.
	Burrow	Subterranean hole in which animal shelters
	Cage	Enclosed roofed area, often with at least one side made of mesh or bars to let in air and light

	Cave	Representative of a natural underground void, typically large enough for a human to enter.
	Coop	Walled building with a roof, typically for housing groups of gallinacious birds, interior typically has nest boxes and perches for the birds
	Crate	Container typically used to transport or introduce animals to a larger enclosure, sturdier than a box, typically framed and sheathed
	Cup	Small plastic/paper container, usually recycled after intended use
	Den	Small enclosed space where animal shelters; typically sleeping quarters or for birthing, often attached to a larger enclosure and off-exhibit
	Emergence Chamber	A closed container for emerging Lepidoptera pupae that will prevent escape of parasitic Hymenoptera they may contain, into the environment.
	Enclosure Group	An assemblage of enclosures that may encompass other smaller Enclosure Groups associated with it. Enclosure Groups can be organized by location within the institution, teams, or zoo-geography and include exhibit and off-exhibit areas. An Enclosure Group may be a Parent enclosure with Child enclosures under it, or a Child enclosure under a Parent enclosure
	Exhibit	An enclosure where animals are displayed, usually to the public
	Flight-cage	A structure or area for housing flighted animals which is large enough to promote flying, typically short term housing and off-exhibit
	HotBox	A container with safe guards for housing venomous animals
	House	A type of Building that contains multiple rooms that hold similar taxa
	Incubator	A container with environmental control of humidity and temperature for eggs, small animals and/or cultures
	Insulated box	Insulated portable container often used for transporting invertebrates, reptiles and amphibians. Typically made of plastic and/or styrofoam.
	Island	An area surrounded by a subterranean barrier, usually a moat

	Jar	Cylindrical container made of glass, plastic or earthenware, typically with a mouth that can be plugged, corked or capped
	Log	Tree trunk modified to house small specimens
	Mews	Open or mesh fronted building with multiple bays that house raptors commonly used in educational demonstrations
	Moat	Trench or channel wide and deep enough to act as a barrier that surrounds all or part of an area
	Nest	Place of refuge to hold animal's eggs or provide a place to live or raise offspring
	Nursery	Designated area for the care of young animals by staff
	Open Range	An area of land without fences or other barriers, or fences and barriers are far apart
	Paludarium	An enclosure that contains both aquatic and terrestrial elements
	Pen/Yard	An open topped enclosure for holding animals. The term describes multiple forms of enclosures that may confine one or many animals. Construction varies depending on purpose, animal species to be confined, local materials used, and cultural tradition. Boma, corral, paddock, pen and yard are synonymous terms
	Petrie dish	A shallow cylindrical glass or plastic lidded dish
	Pit	A subterranean hollow where viewing is typically from above
	Refrigerator/Freezer	Box, room, or cabinet used to keep things artificially cold (refrigerator) or frozen (freezer)
	Room	A subset of a building, enclosed by four walls and a ceiling with the potential of environmental control.
	Run	Indoor or outdoor enclosure with a length dimension greater than the width dimension for use as an exercise area
	Shed	A slight structure for shelter, either a separate building or attached to a permanent building as a lean to, typically with open front or sides and no interior divisions
	Shelter	Something that provides cover or protection, as from the weather.
	Sky kennel	Rigid plastic container with a hinged metal mesh door at one end typically used for shipping animals. May also be used to isolate and treat small animals for a period of time

	Stall	A subset of a barn, wall partitions may be partial or continuous from floor to ceiling
	Test tube	A small tube of glass, open at the top with a rounded bottom
	Vehicle	Used for transport and/or as temporary housing before or immediately following transport. Environmental controls are often present
	Vivarium	A small, mostly terrestrial enclosure typically for the display of amphibians, reptiles, insects, and/or plants

Parent Enclosure

- This is an optional field. The parent enclosure name must also be listed in the Enclosure Name column unless it is your top level parent institution. If left blank, will default to the top-level enclosure created by Species360.

Enclosure Name*	Category*	Type*	Parent Enclosure	Water Type	Volu
Sea Lion Cove	Aquatic	Exhibit	Pinniped A	Seawater (artificial)	
Australian Aviary	Terrestrial	Aviary			
Pinniped A	Aquatic	Enclosure Group			

Water Type

- This is an optional field. A dropdown list of available options is provided.

Water Type	Definition
Estuarine	A mix of salt and freshwater with a lower salinity than seawater. Also known as brackish water.
Freshwater	Unmodified freshwater obtained from surface sources
Groundwater	Beneath the ground surface in soil pore spaces and fractures of rock formations often collected from a well
Municipal	Provided by city, town, or township
Rain Water	Precipitation collected before entering water courses
Seawater	Unmodified seawater obtained from natural sources
Seawater (artificial)	Man-made replication of seawater
Recycled Water	Water captured through storm water pipes and treated in a Water Recycling Plant for re-use.

Volume and Volume Unit of Measurement (UOM)

- These are optional field. If blank, no volume measurement will be assigned to the enclosure.
- Intended to provide volume measurements for aquatic enclosures.

- UOM options limited to:
  - Gallons
  - Liters
  - Milliliters

Responsible Party

- This is an optional field. If blank, no responsible party will be assigned to the enclosure.
- Your institution may enter staff employee or team responsible for a given enclosure. Staff and teams must be entered in the staff section of the My Institution module in ZIMS in order to be assigned.
- Add Staff in ZIMS help.

Operational Date

- This is an optional field. If blank, no operational date will be entered for the enclosure.
- Once your data is migrated, if you try to record an animal in an enclosure prior to this Operational Date you will receive a warning message but you can continue.

Note

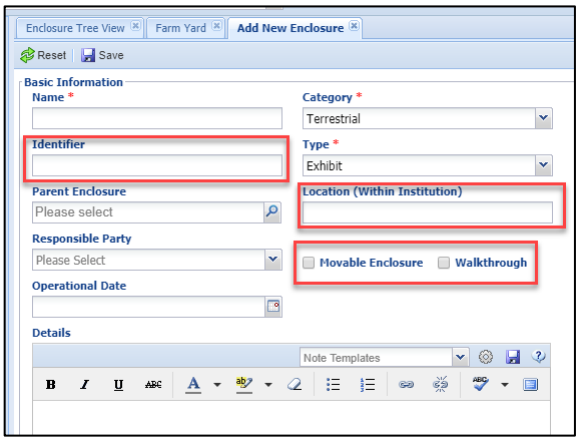
- This is an optional field.
- You may enter any text notes relevant to the enclosure. This text will be attached as a note to the creation of the enclosure in ZIMS.

Error Code and Error Message

- You should not enter any information in these fields. This column will provide an error code and corresponding details message for any data that is not entered correctly. These fields will be populated by Species360 after the initial test migration of data provided by your institution.

Below is what the Add New Enclosure screen in ZIMS looks like.

- Once migrated, you will be able to record the following information if desired:
  - Identifier – usually a shortened Name
  - Location – free text field
  - Moveable Enclosure
  - Walkthrough



Back to Order for Template Completion

Life Support Systems

Note: This sheet should be completed after the Enclosure Template sheet and before the Components sheet.

This sheet will migrate your life support systems, which may be aquatic, terrestrial or incubation systems. Life support systems are the umbrella groups that encompass the individual components that sustain life for the animals in an enclosure. You will establish your life support systems here, and list the components in the Component Template to be attached to the Life Support System. Life Support Systems can be attached to an enclosure.

Example of Structure:
Polar Bear Exhibit (Enclosure)
Polar Bear Exhibit Life Support (Life support system)
Polar Bear High Rate Sand Filter (component)
Polar Bear Ozone Generator (component)
Polar Bear Pool ORP Meter 1 (component)
Polar Bear Pool Chiller (component)

Column Instructions:

Life Support Group

- This is a required field. A dropdown list has been provided with terms. What is selected here will impact what Enclosures the Life Support can be attached to.
  - Aquatic Life Support
  - Terrestrial Life Support

- Incubation Life Support

Life Support Status

- This is a required field. A dropdown list has been provided with terms.
  - Operational
  - Retired
  - Shutdown

Life Support Name

- This is a required free text field.
- Name must be unique within your institution.

Responsible Party

- This is an optional field. Staff and teams must be entered in the staff section of the My Institution module in ZIMS in order to be assigned.

Connected to Enclosure

- This is an optional field. You may enter an enclosure to which the life support system will be connected.
- The enclosure must be listed in the enclosure data migration template sheet. If left blank, the life support system will not be connected to any enclosure.

Note

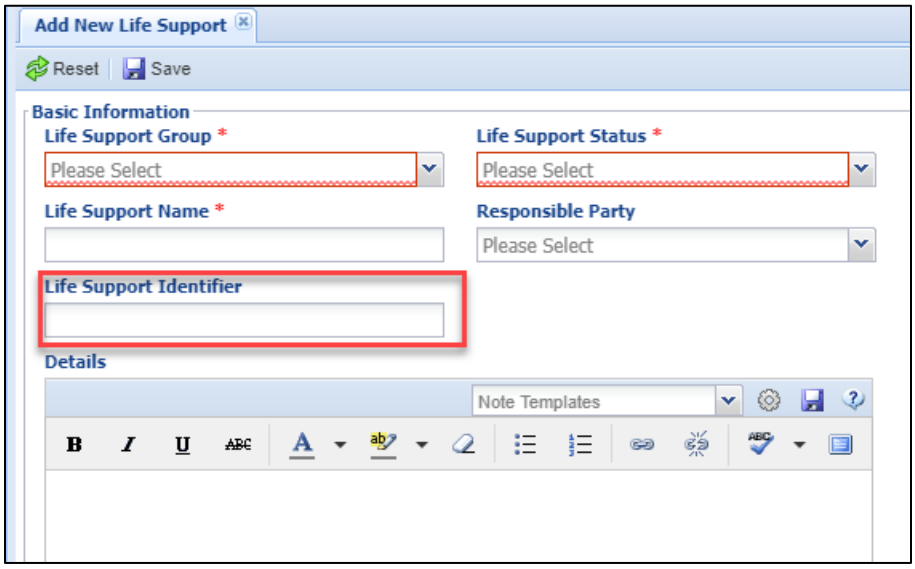
- This is an optional field. You may enter any notes associated with the life support system. Any text here will be added as a note to the creation of the life support system transaction in ZIMS.

Error Code and Error Message

- You should not enter any information in these fields. This column will provide an error code and corresponding details message for any data that is not entered correctly. These fields will be populated by Species360 after the initial test migration of data provided by your institution.

Below is what the Add New Life Support screen looks like.

- After migration you can add a Life Support Identifier which is often a shortened version of the Life Support Name.



Back to Order for Template Completion

Components

Note: This sheet should be completed after the Life Support System Template.

This template sheet is used to migrate your life support components into ZIMS. Components are the individual entities that make up your life support system. Components are attached to a life support system, and the life support system is attached to an enclosure as follows:
Example of Structure:
Polar Bear Exhibit (Enclosure)
Polar Bear Exhibit Life Support (Life support system)
Polar Bear High Rate Sand Filter (component)
Polar Bear Ozone Generator (component)
Polar Bear Pool ORP Meter 1 (component)
Polar Bear Pool Chiller (component)

Components are entered individually so that you can track measurements, maintenance, notes, etc. on each separate entity.

Column Instructions:

Component Name

- This is a required field.

- Name must be unique within your institution.

Component Type

- This is a required field
- A dropdown list of options is provided upon clicking the cell. These options are high-level categories for the type of component being entered. These options include:
    - Aquatic – Environmental Quality
    - Aquatic – Filtration
    - Aquatic – Plumbing
    - Aquatic – Lighting
    - Incubation
    - Terrestrial – Air
    - Terrestrial – Ground
    - Terrestrial - Lighting
- Following migration, you can go into ZIMS and further specify the type of component.
    - Example:
        - Aquatic – Filtration > Mechanical Process > High Rate Sand Filter

Attached to Life Support

- This is an optional field to enter a life support system to which the component should be attached.
- A dropdown list has been provided and will be populated by the life support list that you have provided on the Life Support template. If left blank, the component will not be attached to any life support system.

Note

- This is an optional field. You may enter any note information in this field. Any text will be migrated in as a note for the component creation transaction in ZIMS.

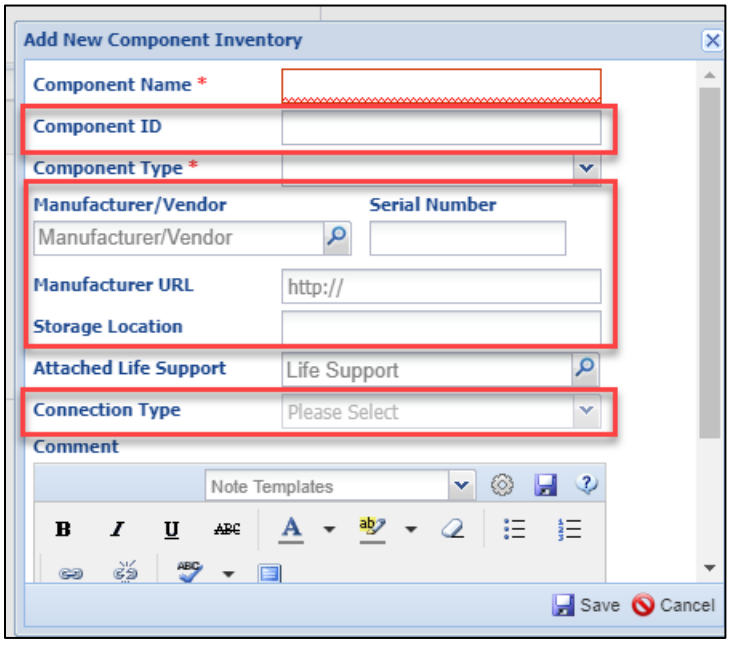
Error Code and Error Message

- You should not enter any information in these fields. This column will provide an error code and corresponding details message for any data that is not entered correctly. These fields will be populated by Species360 after the initial test migration of data provided by your institution.

Below is what the Add New Component screen looks like in ZIMS.

- After migration you can add the following information:
    - Component ID – usually a shortened version of the Component Name.

- Further define Component Type.
- Manufacturer/Vendor, Serial Number, Manufacturer URL and Storage Location.
- Connection Type. When migrating the default Connection Type is Permanent.



Back to Order for Template Completion

Animals

Note: This sheet should be filled out after the Animal Collections and Enclosure sheets have been completed.

This template will be used to migrate in your current animal collection. Any animals you currently hold should be listed in this sheet. Animals that are out on loan will need to be entered once the migration is complete. Historical inventory should not be included.

Column Instructions:

Accession Date

- This is a required field.
- This should be the date that this animal became a part of your institution's collection.
- If you do not know the accession date, common practice has been to use 01/01/YEAR, with YEAR equaling your best guess as to when the animal became part of your collection. You may want to keep a list of these animals so that you can provide a better date estimate once migrated using the date estimate options available in ZIMS.

- Estimated date ranges cannot be recorded on the spreadsheet. If you have an estimated date, record it using the averaged date and include a Note using a keyword i.e. Estimated Date, so it will be easily searchable and fixable once in ZIMS.
- All dates must be recorded using the same date format that you entered in the Date Format column (C) in the SourceInstitution Template sheet.

Accession Event Type

- This is a required field.
- A dropdown list has been provided with accession event type options to include:

Term	Definition	Includes:
Birth/Hatch	Animal was born/hatched at your institution	• Birth/hatch (Physical and Ownership) • Birth/hatch (Physical only) • Birth/hatch (Ownership only)
Collected from Wild	Animal was removed from the wild to be added to an institution's collection.	• Collected from Wild (Physical and Ownership) • Collected from Wild (Physical only) • Collected from Wild (Ownership only) • By-catch (Physical and Ownership) • By-catch (Physical only) • By-catch (Ownership only)
From Another Institution	Animal was received from another institution	• Designated to My Institution (Ownership only) • Donation (Physical and Ownership) • Donation (Ownership only) • Lease From (Physical only) • Lease Transfer From (Physical Only) • Loan In From (Physical Only) • Loan Transfer From (Physical only) • Purchase From (Physical and Ownership) • Purchase From (Ownership only)

		• Trade From (Physical and Ownership) • Trade From (Ownership only) • Undetermined (Physical and Ownership) • Indeterminate (Physical and Ownership)
Rescued	Injured or orphaned animal either brought into your institution by another or removed from the wild by your staff for animal care/welfare reasons.	• Rescued (Physical and Ownership) • Rescued (Physical Only) • Rescued (Ownership Only)
Appeared	Animal was acquired without prior institutional intent.	• Appeared (Physical and Ownership) • Appeared (Physical Only) • Appeared (Ownership Only)
Undetermined	The terms of the acquisition are not known at this time	• Undetermined (Physical and Ownership) • Undetermined (Physical only) • Undetermined (Ownership only) • Indeterminate (Physical and Ownership) • Indeterminate (Physical Only) • Indeterminate (Ownership)

- Following migration, you can go in and further detail the accession type if desired.

Sending Institution

- Optional field; this field should only be filled in **if**:
  - "From Another Institution" is the selected accession event type.
  - You know what institution sent the animal.
- A type-ahead dropdown list has been provided of all institutions that are currently in the ZIMS institution list. Double-clicking on the cell will provide this list.
- If an institution is not listed on the dropdown list (and therefore is not yet in ZIMS), you should leave this field blank and create a new local institution in ZIMS at a later date. If an institution has a large number of animals from the same institution, and that institution is not

listed in ZIMS, you can contact Species360 to have the sending institution added prior to migration.
- If left blank for an animal designated as "From Another Institution", the sending institution will be set to Undetermined.

Owning Institution
- This is an optional field, but it should be filled in if the animal is owned by another institution.
- A type-ahead dropdown list has been provided of all institutions that are currently in the ZIMS institution list. Double-clicking on the cell will provide this list.
- If an institution is not listed on the dropdown list (and therefore is not yet in ZIMS), you should leave this field blank and create a new local institution in ZIMS at a later date. If an institution has a large number of animals from the same institution, and that institution is not listed in ZIMS, you can contact Species360 to have the sending institution added prior to migration.
- **If left blank, the animal will automatically be designated as owned by your institution.**

Local ID
- This is a required field. If left blank, ZIMS will auto-generate an animal ID number based on the preferences your institution sets in the ZIMS application under Start > Institution > Institution Preferences > Application Settings.
- You may enter these manually, which may be helpful for animals that are parents of other animals in your collection.
- House names and any other identifiers such a tag, bands and tattoos are separate Identifiers in ZIMS that can be added after migration.

Taxonomy
- This is a required field. The taxonomic name must be entered for each animal or group of animals. You can copy the cells is you have a number of the same taxonomy.
- A type-ahead dropdown list has been provided with a complete listing of the taxonomies currently available in ZIMS. If you have a taxonomy that is not in this list you should submit that taxonomy to Species360 for verification and addition to the taxonomic list.

Count/Sex Type
- This is a required field.
- Animals may be entered as individuals or groups
    - *Groups should only be entered when an institution has a group of animals of a single taxonomy that cannot be distinguished from each other and are housed in single enclosure.* These animals will be tracked as a single entity until/unless you separate out individuals once identifiable.

- Example: A school of one species of fish
- Example: A group of slider turtles in your marsh exhibit

  - Colonies may also be entered as a group by typing "colony" here. Colony count will be set to 1. Following migration, you can go into the colony and add a colony census count to estimate the size of the colony.
    - Example: A colony of bees/colony inventory count = 1 colony/colony census count = 500 bees

- **You may enter data here as follows:**

Count/Sex Type =	Animal appears in ZIMS as:
Male or 1.0.0	Individual male animal
Female or 0.1.0	Individual female animal
Unknown	Individual animal of unknown sex
0.0.1	Individual animal of unknown sex
2.0.0	Group of (2) male animals
0.2.0	Group of (2) female animals
0.0.2	Group of (2) animals of unknown sex
2.2.2	Group of (6) animals containing 2 males, 2 females, 2 animals of unknown sex
Colony	Group of 1 colony of animals

Sire

- This is an optional field.
- If the sire of animal is known and is at your institution, you should enter the corresponding Local ID that was recorded in the Local ID column for that individual.
- If blank, sire will be designated depending on accession type as follows:

Accession Type =	Sire
Wild/Rescued/Appeared	WILD
Birth/Hatch/From Another Institution/Undetermined	Undetermined

- For an Appeared accession that was probably captive bred (example: the ferret someone dropped off at your front gate), record UNDETERMINED in the sire field.
- If the sire was at another facility leave this field blank. Once migrated you can correct this in ZIMS.

Dam

- This is an optional field.

- If female parent of animal is known and is at your institution, you should enter the corresponding local ID that was recorded in the Local ID column for that individual.
- If blank, dam will be designated depending on accession type as follows

Accession Type =	Dam
Wild/Rescued/Appeared	WILD
Birth/Hatch/From Another Institution/Undetermined	Undetermined

- For an Appeared accession that was probably captive bred (example: the ferret someone dropped off at your front gate), record UNDETERMINED in the sire field.
- If the dam was at another facility leave this field blank. Once migrated you can correct this in ZIMS.

Begin Date (Date of Birth or Establish Date)

- This is a required field.
- You should enter the date of birth for an individual animal.
- If date of birth is not known enter UNDETERMINED.
- If entering a group of animals, enter an "establish date" – the date the group was established at your institution.
- Estimated date ranges cannot be recorded on the spreadsheet. If you have an estimated date, record it using the averaged date and include a Note using a keyword i.e. Estimated Date, so it will be easily searchable and fixable once in ZIMS.
- All dates must be recorded using the same date format that you entered in the Date Format column (C) in the SourceInstitution Template sheet.
- Begin Date should be a date the same or before the date recorded in the Accession Date column

Accession Date*	"Begin" Date* (DOB/Establish Date)
1-Jan-2018	1-Feb-2008

Enclosure

- This is an optional field.
- You should enter the enclosure that the animal currently occupies. The enclosure list provided on the enclosure template will be populated into a dropdown list for this column.
- If blank, the animal will be accessioned into the top-most level enclosure of the institution.
- Once migrated you can enter historical enclosure moves into other enclosures the animal previously occupied.

Collection

- This is an optional field.

- You can enter a collection from the dropdown list populated by the collection template sheet.
- If left blank, animal will be accessioned into your main collection.

Note

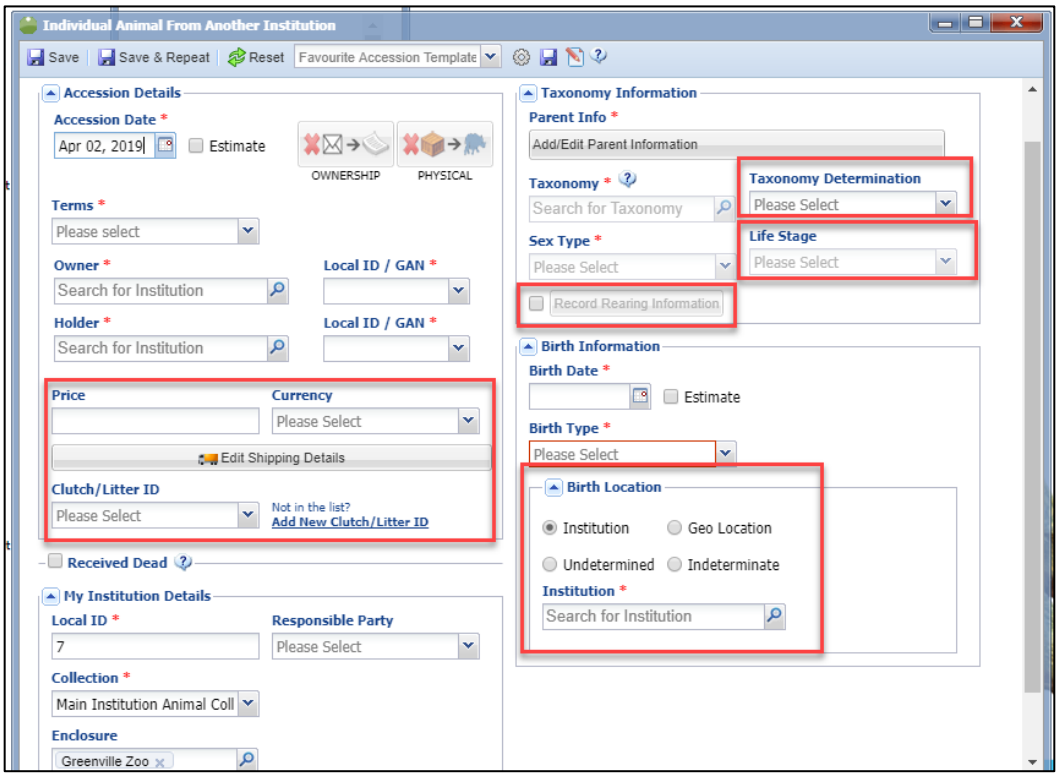
- This is an optional field
- You may enter text here that will be added as a note to the accession transaction for the animal. As noted previously, this is a good place to record "Date estimate" to remind you to correct an estimated date once you are in ZIMS.

Error Code and Error Message

- You should not enter any information in these fields. This column will provide an error code and corresponding details message for any data that is not entered correctly. These fields will be populated by Species360 after the initial test migration of data provided by your institution.

Below is what the Individual Animal From Another Institution accession screen looks like in ZIMS:

- Once you have migrated you can add the following details if desired:
  - Price and Currency
  - Shipping Details
  - Clutch/Litter ID
  - Taxonomy Determination
  - Life Stage
  - Rearing Information
  - Birth Location



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