Directions on how to Export from ZIMS for Studbooks and create a PMx Project

Exporting ZIMS to the SCTI PMx Software for pedigree analysis and management
Contact SPECIES360 Support

Note: Remember to download the newest version of PMx. The new ZIMS exports are not supported by older versions of PMx.

PMx is currently available here and is supported by SCTI (not supported by Species360): SCTI.TOOLS Website of PMx

Additional PMx Resources:
- A Guide for Testing ZIMS PMx Exports - by Sara Sullivan (SCTI) and Katelyn Mucha (Species360)
- Export to PMx
- This document is based on ZIMS exports
- Studbook Training Library Index

Creating your ZIMS for Studbooks PMX Export
1. From the Tools icon on the left hand bar of your studbook, select "Export to PMx"
2. The PMx export screen will open up in your studbook view – this is where you can choose filters to apply to your exported data.
3. There are three boxes where you can select your filter preferences:
   a. Demographic: filters selected here will be applied to the demographic csv that is created
   b. Genetic: filters selected here will be applied to the genetic csv and the ZIMS file that is created
   c. Census: filters selected here will apply to the "Exchens" export that is created and will be used as the census information in PMx.
4. To apply filters across all boxes, the user can enter the demographic filters and then select "Apply this selection to all filters" button.
   a. This will apply date, institution, UDF, and taxonomy selections to the genetics selection.
   b. This will apply the institution, UDF, and taxonomy selections to the census selection – date will remain December 31 of previous year (user can manually change date).
5. If no specific filters are applied by the user, the export will use the following default filters:

a. Demographic and Genetic Filters:
   i. Start date: 1 January 1900 – End date: date of export
   ii. No institution, UDF, or taxonomy filter applied
b. Census Filter:
   i. Date: 31 December of previous year
   ii. No institution, UDF, or taxonomy filter applied

6. Next to the "Export Report" button there is a check-box to include in-situ animals, by default this box is unchecked. If your program manages animals in the wild as part of the managed population, you can select this button to include those animals in the genetic and demographic analysis. Do not check this box if all of the animals in your managed population are in captivity. See Include In Situ for more information.

7. Once the you have selected the desired filters – click the "Export Report" button in the bottom right corner of the export screen.

Note: Please change your number separator format preferences in ZIMS to match your computer settings prior to export to PMx. If the preference settings in ZIMS does not match your computer settings, PMx may not recognize the files and produce an error.

- From the main ZIMS screen select Start → My Preferences → Change Language, Date/Time and Separator Formats → Under separator formats select the format that your computer recognizes.
- If Comma (,) is selected then the PMx .zims file will export with commas.
- If Decimal (.) is selected then the PMx .zims file will export with decimals.

Once a user selects to run the PMx export they will receive notification that their export is being run. After they receive this notification they can choose to run additional PMx exports or close the PMx screen and continue to work on their studbook. The export will run behind the scenes and once it is completed the user will receive a notification and the export will automatically download to their browser. The export will run in the background for as long as needed and the user can continue to work on their studbook while waiting for the export to complete. If the user closes the studbook module or logs out of ZIMS prior to the export completing, the next time they open the studbook the export(s) will automatically download. The database will save the exports for one week; if the user does not log in within that time they will need to re-run the export.

Accessing your ZIMS for Studbooks PMx Export
8. Your PMx export will be created as a zipped folder.
9. On your computer navigate to the "Downloads" folder to find the recently created PMx project.
   a. **Note:** In some web browsers, the downloads will display in the bottom of the browser and you can access the folder directly from the browser.

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10. Once you have accessed the PMx export folder, right click to extract the files in the folder.
11. If desired, you can rename the folder and save the folder in a different location on your computer.

Creating your PMx Project

12. Open PMx and select "New Project"
13. Name your PMx project
14. In the primary input file, browse for you PMx export and select the "ZIMS" file (previously the "ped" file) and then select Next to navigate to the next screen.
15. Use the default selection of "Move records in.CSV format"
    a. In the demography, box navigate and open the demographic.csv file from your export
    b. In the genetic box, navigate and open the genetic.csv file from your export
        i. **Note:** the genetic selection will automatically prefill with what looks like the genetic csv, but on some computers will fill with the demographic csv. Please make sure to confirm the selections are correct.
16. Under Additional Optional Input Files navigate to the Census box. Navigate and open the Exchens text file for this selection.
17. Select "Create" button to create your PMx project.

Revised 15 September 2020