Aquatic ZIMS On-boarding Skills

Congratulations! You're in ZIMS! Someone at your institution will need to be assigned the ZIMS Role of Local Admin. They will need to develop the skills associated with that Role. Please reference Local Admin Onboarding

The skills presented here are for front line staff who deal directly with the animals and manage the tanks and water quality. When you start using ZIMS, as an Aquarist you will need to master the following skills.

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1.Know how to set your My Preferences

Setting your My Preferences can help save you data entry time by making the data in some fields default to your preferences so they do not have to be edited each time.

To set your My Preferences go to Start > My Preferences. Some My Preferences that Aquarists should take the time to set are:

- Language, Date/Time and Separator
  - Language (ZIMS is available in English, Spanish, Russian and Japanese)
  - Date View Format
  - Date Edit Format
  - Time Format
  - Time Zone

- Measurement Preferences
    - Default Unit for Length
    - Default Unit for Weight
    - Default Unit for Temperature
- Application Preferences
    - Default Responsible Party
    - Module Boxes (the grids in a record)
    - Identifier
- Enclosure Preferences
    - Default Enclosure Category & Type (if you will be adding Enclosures)
    - Default Enclosure & Collection (if you will be accessioning animals)
- Account Settings
    - This is where you can change your Password, E-mail and User Name

There are a few Institution Preferences that you may want to ask your Local Admin to set:

- Allow Multiple Enclosure Assignment
- Enable auto-incrementing Local ID
- Default Colony Count
- Default Group Tracking
- Enable auto-accept for Species360 taxonomic changes
- Enable auto-update of Animal Lists upon disposition

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2.Know how to find animals

There are several ways to find your animals in ZIMS. Which one you use will depend on what information you have available.

- From the Start Menu > Search for Local Animals
    - This is a search for Local animals (animals your institution has held or had ownership of) and returns results the fastest because it is searching only your Local records
    - ZIMS searches by GAN (Global Accession Number, Local ID, House Name, Taxonomy and other identifiers
- Animal Simple Search
    - From within the Animals module
    - You can search for both Local and Global (animals you have never held or owned) animals
    - Provides a search using limited filters

  - You can create saved search filters for searches you often perform
- Animal Advanced Search
  - From within the Animals module
  - You can search for both Local and Global animals
  - Provides a search using a multitude of filters
  - You can create saved search filters for searches you often perform
- From an Animal List
  - Results grid allows selecting Local animals
  - Can be created for only those animals you are responsible for
  - See [Animal Lists](#) for how to create these
- Search by Identifier/GAN
  - Top of Animals module
  - Find both Local and Global animals
  - Can filter by Institution
- From the Occupants tab in the Enclosure record
  - Default is current occupants
  - Search grid allows for finding historical occupants

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3.Know how to move animals between enclosures/tanks

There are two types of enclosure moves in ZIMS.

- Record Current Enclosure
  - Moving an animal from its current enclosure into a new enclosure
  - A move out date will automatically be recorded for the enclosure the animal was moved out of unless multiple enclosures are allowed
- Record Historical Enclosure
  - Recording an enclosure move that was performed prior to the animal occupying its current enclosure
  - A move out date will NOT automatically be recorded for the enclosure the animal was moved out of

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4.Know how to use the Animal Feed Log

The animal Feed Log is found under the More Details tab in the animal record. It captures the following information:

- Feeding Date, Time and who did the feeding
- Food Provided

- Quantity Offered
- Quantity Consumed and Quantity Left
- If Units of Measure for the Food Provided match, ZIMS can calculate Total Offered and Total Consumed
- Energy Content
- If Units of Measure for the Food Provided match, ZIMS can calculate the Total Energy Count
- Feeding Method

Animal Feed Logs are available as a Batch Action and can be included in Husbandry Log Templates.

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5.Know how to record Water Quality Measurements

To record a Water Quality Measurement, open the appropriate enclosure/life support/component record and go to the Water Quality Measurements grid. If you have created a Measurement Range Template for this tank, if the measurement recorded is outside your desired range you will be notified. Water Quality Measurements are available as Batch Actions and can be included in both Aquatic Daily Logs and Husbandry Log Templates.

Selecting to View Measurement Graph will take you to Environmental Quality Graph which allows you to see a visual of your measurements.

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6.Know how to create a Measurement Range Template and email notification

Before you start recording Water Quality Measurements you should create Measurement Range Templates for the measurements that you want to take on your tanks. The benefit of creating these is that you will get notifications when a measurement is outside the range that you want it to be.

These templates are found under Start > Tools > Measurement Range Templates.

- You first assign Minimum and Maximum Range Values for your measurements
- You then assign these Range Values to specific enclosures/tanks

Now, when you take a measurement outside of your desired range you will get an instant notification of such. In addition, the reading will display in red in the grid.

Because you may want to notify someone of this measurement, from within the Water Quality grid in the enclosure/tank record, you can set email notifications to specific staff members. Measurement Range Templates and email notifications can save lives!

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7.Know how to use the Environment Quality Graph

The Environmental Quality Graphs are found under Start > Tools > Environmental Quality Graph. You can also open them by selecting View Measurement Graph within an enclosure/life support/component record. These graphs allow you to graph

- One entity (enclosure/life support/component) and a single measurement
- One entity and multiple measurements
- Multiple entities and a single measurement
- Multiple entities and multiple measurements

The resulting graph can be printed or downloaded to various formats.

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8.Know how to create and attach a Life Support

Life Supports can be managed in ZIMS fairly simply or more complexly.

- To create a simple Life Support
    - Create a Life Support
    - Attach it to an Enclosure
- To create a more complex Life Support
    - Create an Inventory of Components
        - If the Life Support has already been created, you can attach the Component to the Life Support from the Component Add New screen
    - Create a Life Support
        - What is selected for Life Support Group will drive what Enclosures you can attach it to
    - Attach the appropriate Components to the Life Support
        - This can be done from the Life Support or the Component record
    - Attach the Life Support to an Enclosure(s)
        - This can be done from the Enclosure or the Life Support record

You may want to start with simple Life Supports to get your feet wet. ☺ It is important to note that a Component can be attached to only one Life Support, but a Life Support can be attached to multiple Enclosures.

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9.Know how to record Splits/Merges/Close Out in Groups

The members of Groups are usually not static and often members are removed or added. When something happens to all the members of a Group it is called a Full Transaction. When something happens to only some members of a Group it is called a Partial Transaction.

- Split
  - One or more members of a Group are removed and a new Individual or Group record is created
  - One or more Individuals of a Group are removed and immediately put into an existing Group
- Merge
  - An Individual, some members from another Group, or an entire other Group are added to the Group

You would Close Out a Group when it no longer exists. A Full Disposition of a Group (such as all members die or were dispositioned) will automatically Close Out the Group. If a Partial Transaction brings the census down to zero, the Group will continue to appear on Reports and Inventories with a count of 0.0.0 and you will manually need to Close Out. A Group census does not have to be 0.0.0 to Close Out.

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10.Know how create and close a Calendar Task

My Calendar allows you to schedule future tasks so you will not forget to do something. Calendar Tasks especially valuable to an Aquarist include

- Animal Alert
- Animal Measurement
- Enclosure Alert
- Medical Procedure
- Maintenance Task
- Enclosure Treatment Task

Once a task has been completed you can Mark Complete and will have the option to remove it from your Calendar view. You also have the option to view the Calendar in a

List View that can be exported to Excel or pdf and can be handy for review during meetings.

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11.Know how to create and use an Aquarist Daily Log

An Aquarist Daily Log lets you organize your enclosures/tanks and all the actions you need to perform on them into a template. Aquarist Daily Log is found under Start > Tools > Manage Templates. Once created, they will save tremendous data entry time.

You first record the Entities (enclosures, life supports or components) that you want included in the log template. You then select the Data Fields (what actions you want to take). The options for Data Fields include

- Notes and Observations
- Feed Log (Enclosures only)
- Maintenance
- Environmental Measures (can select multiple measurements)
- Water Quality Measures (can select multiple measurements)

Both the Entities and the Data Fields can be ordered as you want.

When you use the template, the Entities will display in a column on the left and the Data Fields will display as additional columns to the right. Enter the data as appropriate (you do not have to enter something in every field) and Save. The data will go into the record for the Entity.

Learn more about Aquarist Daily Logs

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12.Know how to create and use a Husbandry Log Template

The Husbandry Log Template takes the Aquarist Daily Log up a level. In addition to recording the data on your enclosures/life supports/components that is available in the Aquarist Daily Log, the HLT also captures the following data on your animals

- Feeding Log
- Enrichment Session
- Training Session
- Notes and Observations
- Measurements

- Checklist Item

You can mix entities on a single sheet, create multiple sheets such as recording all your animal information on one sheet and your enclosure information on another, or create a sheet for each animal or enclosure.

You also have the option to select what you want to display under the Type of actions selected. For example, we have selected an Animal as the Entity and Feed Log as the Type

- Mandatory Fields that are activated by default
  - Food Item
  - Amount Offered
  - Unit of Measure
- Optional fields that you can activate
  - Amount Consumed
  - Amount Left
  - Feeding Method
  - Energy Content
  - Details

You can also select what animal identifiers you want to display at the top of the column to help you identify what record you are recording the data in.

You do not need to enter something into every field. Once you Save, the data will go into the appropriate record.

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13.How to create and record data into a Collection Trip

The Collection Trip functionality allows you to have all the information on a Collection Trip in one place

- Trip Name
- Trip Dates
- Trip Lead and Personnel
- Location
- Vehicles Used
- Permits Associated
- Accession Log

The Accession Log allows you select

- Accessioned – the animals were Accessioned into your collection

- Caught & Released – the animal was captured but you released it
- Died in Transit – the animal died before it reached your facility.

You can also associate animals that have already been Accessioned with a Collection Trip once it is created.

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14. Know how to create Animal and Enclosure Lists

Animal and Enclosure Lists can help save you considerable data entry time.

- Animal and Enclosures Lists made by section of assignment helps Staff easily find the animals/enclosures they are responsible for
- You can record Batch Actions from Lists for all or just some of the members
- Other Staff can use the List so others don't duplicate the effort
- You can restrict editing the Lists to just yourself
- The columns in the List results grids can be customized so you only see what you want to see

It is important to remember that these lists are not automatically updated as new animals arrive or are dispositioned or die. If you want the list to be automatically updated for dispositions/deaths, ask your Local Admin to select that Institution. Preference.

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15. Know how to run the appropriate Reports and create filters

The various Reports in ZIMS are found under the Start menu. You should become familiar with their definitions so you will select the right one to get the correct results. The Reports most valuable to an Aquarist are

- Activity Report
- Daily Report
- Enclosure Activity Report
- Enclosure Occupants Summary Report
- Enclosure Report
- Wild Acquisitions Report

If you are running reports for recently entered data, give ZIMS at least 3 minutes to process the data before running a report that may include that data. Otherwise you may get incorrect results.

Some reports can be exported directly to Raw Excel directly. All reports can be exported to various formats after they have been run.

To save you time you can create saved filters for all reports for combinations of filters that you often use.

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