ZIMS for Husbandry Post-Deployment Skills

After deployment in ZIMS, as Local Admin you need to master the following skills.

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1.Know how to set your Institution and My Preferences

Setting your My Preferences can help save you data entry time by making many of the default fields function as you usually would want them to so they do not have to be edited each time. Also, as Local Admin, you can set the Institution Preferences so the ZIMS application functionality is how your institution would like it to be.

To set Institution Preferences go to Start > Institution > Institution Preferences. Some Institution preferences affect ZIMS functionality and by default are not available as My Preferences and by default apply to all your ZIMS Users. These Institution wide Preferences are:

- Enclosure Preferences
    - Allow Multiple Enclosure Assignment
- Application Settings
    - Allow Re-use of Transponders
    - Enable auto-incrementing Local ID
- Measurement & Census Preferences
    - Default Colony Count
    - Default Tracking
- Medical Preferences

- Pathology
- Application Preferences
  - Taxonomy - Enable auto-accept for Species360 taxonomic changes
  - Animal Lists – Enable auto-update of Animal Lists upon disposition
- ZIMS Accessibility and Features
  - All Topics

At the Institution Preference level you usually have the option to Save or Save & Apply for All Users. Be very careful with using Save & Apply to all Users as this will overwrite any My Preferences that your Users have chosen.

As Local Admin what you set for Institution Preferences for those preferences not mentioned above will probably also be your My Preferences. Other Users can set their own My Preferences. To set your My Preferences go to Start > My Preferences. Some My Preferences that Users should take the time to set are:

- Regions and Language
  - Language – ZIMS is available in English, Spanish, Russian, French and Japanese
  - Date View Format
  - Date Edit Format
- Measurement Preferences
  - Default Unit for Length
  - Default Unit for Weight
- Application Preferences
  - Pagination – 20 lines is the default
  - Default Responsible Party
  - Module Boxes (the grids in a record)
  - Identifier
- Enclosure Preferences
  - Default Enclosure Category & Type
  - Default Enclosure & Collection

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2.Know how to assign and create Roles

ZIMS deploys with multiple Species360 Template Roles. You cannot edit these Template Roles. As new functionality is deployed Species360 will update these Roles with the new functionality as appropriate. If the access in these Roles does not fit your needs, you can create custom Roles for your institution. As new functionality is deployed Species360 does NOT update your custom Roles as those are managed at the institution level. It may be easier for you to assign the Template Roles at first and create custom Roles as you get more comfortable with the application. There are two ways to see what access each Template role has.

1. From the Help Menu type Global Template ZIMS Roles. This is a link to an Excel document that details the access.
2. From within ZIMS go to My Institution > Husbandry/Administration Roles > highlight Role > Actions > Manage Role Access > select module

To assign a Role go to Staff grid > highlight Staff member > Actions > View/Edit ZIMS Login Details. Check the ZIMS User box and assign the Role by moving from the left box to the right box by using the arrows or double clicking. You can assign multiple Roles to one Staff member but in most cases simply find the Role that best matches what you want to assign and just assign the one Role. If you do create custom Roles, instead of assigning many Roles to a Staff member you should create a single custom Role that meets your needs. Having multiple Roles assigned can make it difficult for the support staff to determine the cause of a problem should it be Role based.

To create a custom Role, go to My Institution > Husbandry/Administration Roles > Actions > Add New. The Role Name should be unique at your facility. If you want to select a current Role (Species360 Template or another custom Role) to work from you can do that, or simply Save after naming the custom Role and start your custom Role from scratch. Select the new Role from the grid > Actions > Manage Role Access. Working through each module check or uncheck the Search/View, Add, Edit, Remove or Provisional checkboxes to create the Role you want. For some modules you may need to check the Turn on Module Functionality for This Role. Remember to Save between each module.

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3.Know how to use the various search options

There are various ways to search in ZIMS and you should know the best ones to use for what you are looking for.

The fastest way to find a **Local** animal if you know the GAN, another identifier or the taxonomy is to use the “Search for local animals” under the Start menu. The search is fast here because ZIMS is only looking at your local animals.

If you are looking for a **Global** animal and you know the GAN or other identifier you can use the “Search Animals by Identifier/GAN” in the upper left of the animal screen. You can also filter this search by an institution. Enter the institution first before entering the GAN or other identifier.

You can also use your Animal Lists for quick **Local** searches, especially if you have customized your columns to include the identifiers, such as House Name, that you remember the best.

The left-hand expandable search box includes multiple options to filter your search for both **Local** and **Global** animals. Once you have performed a search remember to reset the filters before performing another search. For both Animal Simple Search and Animal Advanced Search you can save Favourite Search Filters for those searches you may do a lot. To create a saved filter, use the various fields to enter the data you are looking for. An example may be all your Primates that are On-Site and in your Main Animal Collection. Then select the Save icon and name the filter. It will appear in the Favourite Filter drop down for selection, saving you time re-entering your filters. To delete a filter, select the gear icon to manage your filters.

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4.Know how to handle Pending Transactions

Your Pending Transactions are found under the Statistics tab in the Animal module. It is your responsibility to address those Pendings listed under By My Institution. If you have more than one Pending transaction in a record you will need to address all of them before you can successfully save the transaction stream. Sometimes these multiple Pendings get stuck in an endless Pendings loop. If this happens to you contact support@Species360.org as they will need to help you fix these.

There are four actions that you can take on your Pendings and it is importance that you understand the correct use of the terms.

- Confirm/Edit – You agree that the transaction took place. When you select to Confirm you have the opportunity to edit any of the fields. Once you confirm the transaction will be removed from your pendings list.
- Deny – You do NOT agree that the transaction took place. An example is you did receive a kookaburra from Institution A but the identifiers in the record do not match those on the bird. Institution A probably selected the incorrect record and they will need to fix that by deleting the transaction on their end and finding the correct record. Institution A will receive a Pending noting that you denied the transaction. It will be removed from your Pendings list.
- No Information Available – You cannot confirm or deny the transaction. It may have occurred, but you have nothing to prove it. An example would be you have

a Pending for a reindeer received from Institution B in 1960. You did have reindeer in your collection at that time, but you have no records of where they came from. Institution B will receive a Post Office message that you selected No Information Available. They do not need to take any action. The record will be removed from your Pendings list.

- Not Recorded in ZIMS – You agree that the transaction occurred, but you will not be recording the record in ZIMS. An example would be you received some coral from Institution C. Your institution does not record coral into ZIMS. Institution C will receive a Post Office message that you selected Not Recorded in ZIMS. They do not have to take any action. The record will be removed from your Pendings list.

Although Delete appears to be an option you cannot Delete a pending transaction because it was entered by another institution and you cannot edit/delete data that was entered by another facility. If you truly want the transaction to be deleted, you will need to contact the other institution to do so.

For any transactions that you select a term other than Confirmed, the transaction will disappear from your My Transactions stream. To display them again check the Include Unconfirmed Transactions checkbox to the upper right of the My Transactions screen within the record.

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5.Know how to accession a new individual

If you receive an animal from an institution that is not a member of Species360 or any other type of acquisition other than From Another Institution you will need to create the initial accession. Before you do this make sure that the animal was not previously recorded in the ZIMS database.

Go to Start > Accession > Individual Animals > select transaction Type. Make sure you select the correct accession Type.

- From Another Institution – The animal was received from a facility or a person. If a member of the Public donates an animal, this a considered From Another Institution.
- Collected From Wild – The animal was brought directly from the wild into your facility. Receiving a Wild Born animal from another facility or person is not a Collected From Wild accession.
- Rescued – An injured or orphaned animal is collected from the wild. Often the intent is to rehabilitate and release.

- Appeared – An animal shows up at your facility. This is not a planned transaction and there is no paperwork involved. A Deposited Appeared means someone left it at your facility without making arrangements with you. An Unassisted Appeared means the animal flew, walked or hopped into your facility on its own.
- Birth/Hatch – The animal was born or hatched at your facility or at a non-member facility but you are the owner. If you have first recorded a fetus or an egg you would Record Event for that record and not record a Birth/Hatch accession.
- Undetermined/Indeterminate – You do not know how you obtained the animal. This should only be used for historical entries. Undetermined means you do not know at this time but may in the future. Indeterminate means you do not know and probably never will.

All mandatory fields are marked with a red asterisk and these must be completed before you can successfully save the record. Although Rearing is not a mandatory field it is considered Best Practice to record it. You can change the default Collection and Enclosure under Preferences (either Institution or My Preferences > Enclosure Preferences.

If you are recording multiple individual accessions that will be identical except for the Local ID assigned you can use the Batch Accession option. If you are recording multiple accessions that will be similar you can use the Save & Repeat option that allows you to edit fields before saving each one.

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6.Know how to accession a new group

The types of accession for Groups are the same as for Individuals. There is an additional field to record the count of the group that you are recording. There is also the option to record an Established Date, Type and Location. Often groups have members of varying ages, so Birth information is not appropriate. Using the Established information, you can record information on when the members of the group came together as that group.

You can also track group counts in four ways.

- No tracking – A simple count (census) of the members of the group is recorded.
- Sex Type – The count of the group members is recorded by sexes.
- Life Stage – The count of the group members is recorded by life stages.

- Sex Type and Life Stage – The count of the group members is recorded by the number of sexes in each life stage

You can change the default tracking of your group accessions under Institution Preferences > Measurement & Census Preferences

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7.Know how to record a Receiver Initiated Transaction

A Receiver Initiated Transaction is when you record receiving an animal before the sending institution records sending it to you. You need to be very careful doing this if you are receiving a group of animals because you may only be receiving some members of the group that the sender would have to split from the origin group, creating a new record. The new record would be what you would receive. There are two ways to do a Receiver Initiated Transaction – one is from the Accession screen, the other is from My Transactions.

From Start > Accession > From Another Institution record the Sender or Owner and their Local ID or GAN. If you are doing this for a group, you should record Undetermined for their Local ID unless you are certain that you are receiving the entire group. ZIMS will look for a match in the database. A match will most likely not be found if you recorded Undetermined for the Local ID. Once the match is found check it and select Yes, Go with selected animal if you agree.

You then need to record your Local ID, Enclosure and Collection. Most of the other details on the animal will already be entered into ZIMS. When you save you will receive a message that the current holder has not recorded sending the animal to you yet. This is correct so select OK. The sending institution will receive a Pending that they can confirm.

The other way to record a Receiver Initiated Transaction is from the My Transactions grid. Find the Global record of the animal you received. In My Transactions add an Acquisition. The sender will receive a Pending transaction to confirm. If you are receiving a group do this only if you are certain that you are receiving the entire group.

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8.Know how to record a Death (Individual and Group Full/Partial)

The Husbandry and Medical modules are both impacted when a death is recorded. The actual death transaction itself is recorded in the Husbandry module. But much of what is recorded there is also automatically recorded in the Necropsy part of the Medical module. If Necropsy information is recorded in the Medical module for an individual before a death is recorded in the Husbandry module, an Incomplete Disposition is created in the Husbandry module to give a heads up that a death needs to be recorded there.

If Convert to Sample is selected as the Carcass Disposition, a new field of Edit Carcass becomes active. Here you can record what body part was made a sample and where it went.

If a death for an animal that you have out on loan is recorded by the Holder you will also need to record the death if you agree that it did indeed die. Otherwise the animal will still appear to be owned by you and will show up in reports that deal with ownership. You should receive a Pending for this transaction.

For Groups you have the option to record the death of the entire Group (Full Disposition) or just some members of the Group (Partial Disposition). A Full Disposition Death will automatically mark the Group as Closed Out. A Partial Disposition Death will not automatically mark the Group as Closed Out, even if it takes the Group count down to zero. You will need to select to Close Out the group yourself. An Incomplete Disposition is not created for necropsies recorded in Groups.

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9.Know how to edit a Birth/Hatch Date

How you edit a Birth Date depends on how it was entered originally.

If your accession was a Birth/Hatch or a Record Event from an egg or a fetus, the Birth/Hatch Date will be edited from the My Transactions stream. If you go to More Details > Birth/Hatch Date and Event Location and select to Edit it from there, you will be directed back to the Birth/Hatch accession or the Record Event record.

If the accession was any other type of transaction and you recorded the Birth/Hatch Date as part of the accession screen, you will go to More Details > Birth/Hatch Date and Event Location. Select the Birth/Hatch and Edit from the Actions menu. You will not be taken back to the accession screen but will be able to edit the date directly from there. You cannot edit a Birth/Hatch Date entered by another institution.

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10.Know how to edit Parents

You cannot edit parents that were entered by another institution. You can only edit those parents entered by your facility. To edit parents, go into the Parents grid > Actions > Edit Parents.

If parentage has been determined for an animal where you had recorded Undetermined or Indeterminate parentage click on the Undetermined or Indeterminate selection. This will clear the record and activate the Add New Parent option.

If you edit parents, you will usually need to re-adjust the percentage probability that it is the parent. You can do this while adding a new parent, or from the Manage Parent button or from the Edit/Delete wheel icon displayed when the parent grid is open.

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11.Know the requirements for merging two records

Species360 can merge two records that should be a single record. This duplication often happens when one institution creates a new accession for an animal/group that is already in the database. If one record is at your institution and the other at another institution, you will need to work with them to get confirmation that the two records should indeed be merged. To request a merge contact support@Species360.org. When you request a merge remember to include both GANs. Usually the original GAN, or that of the first holder, is retained. The other GAN becomes an Old Accession Number identifier. No confirmation from the other institution is required if the following match in the records.

- Taxonomy
- Date of Birth
- Sex
- Birth Location
- At least one of these
    - House Name
    - Studbook ID
    - Transponder

Species360 support will let you know when the merge has been completed. You will also receive a Post Office message. You should check that the merge was correct, and all the information is there. Remember to let support know that all is well so they can close the merge request issue.

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12.Know how to add a taxonomic synonym and accept taxonomic changes

Your staff may wish to use a different taxonomic or common name than is the default species name in ZIMS. To add a synonym that you can select to be your preferred display, open the Taxonomy module and do a search for the appropriate species. Open the species record > Synonym grid > Actions > Add New. The Synonym Type is either the Common or the Scientific Name. Enter the synonym as you want it to display. If you want the synonym to be the default display, check the "Preferred" checkbox.

Species360 will update the global taxonomy as changes are made. In the Animal Statistics tab these changes are noted under Pending Taxonomic Changes. The list will display the Former Name and the Changed To Name for both Scientific and Common Names. The Animal ID Count is the number of records affected by the change, should you accept it, and is a hyperlink to a results grid where you can review the records. If you do NOT want to change the name for all the indicated animals, you will need to manually change the name within each record. If you DO want to change all the records, simply check the left-hand box and then Accept Species360 Taxonomy. The change will be reflected in all the records.

You can opt to automatically accept any taxonomy changes under Institution Preferences > Application Preferences > Taxonomy. If you check the Enable auto-accept for Species360 taxonomic changes, all updates will be automatically reflected in your records. You will receive a Post Office message regarding the update so you will continue to be informed regarding changes. You can also opt into an email alert for these updates [here](#).

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13.Know how complete Incomplete Accessions

Incomplete Accessions were designed to allow data entry into a record even though a full Accession or Visit has not yet been created. They can also be migrated from MedARKS (the medical application prior to ZIMS) "non-accessioned animals".

There are two ways to associate a full accession with an Incomplete Accession.

1. After a full accession is Saved, ZIMS will look for any possible matches in your Incomplete Accessions using the taxonomy. If a match is found, you can opt to associate the Incomplete Accession with the full accession. If information is different you can select whether to save the data in the full accession or in the

Incomplete Accession. The GAN of the Incomplete Accession will become an Old Accession Number identifier

2. You can select to Complete Selected from your list of Incomplete Accessions. Record the GAN of the full accession that you want the Incomplete Accession to be associated with.

Because an entity is not selected for an Incomplete Accession there may be times when a single Incomplete Accession needs to be associated with multiple full accessions. An example of this is four frogs were received and only one Incomplete Accession was created. However, the frogs were transpondered, so four full accessions were created. In the reverse, there may be times when multiple Incomplete Accessions need to be associated with only one full accession. An example of this would be the four frogs were received and the Vet created four Incomplete Accessions. However, the frogs cannot be individually identified so will be managed as a group.

- Single Incomplete Accession needs to be associated with multiple full accessions: When recording the full accessions DO NOT choose to associate any of them with the Incomplete Accession. Once all full accessions are completed, find the single Incomplete Accession, select Complete Selected, and record all the GANs for the multiple full accessions.
- Multiple Incomplete Accessions need to be associated with a single full accession: When you save the full accession check all the Incomplete Accessions that should be associated with the single full accession.

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14.Know how to use the reports and create favorite 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 defaults for the various filters are not identical for all the reports so be aware and edit as needed. Read all the various fields available for filtering to make sure you get results for what you are looking for and not more results than meet your needs that you must filter through.

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. If not, you may get incorrect results.

Some reports can be exported directly to Raw Excel. 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. To create a saved filter, open the report and enter the filters you want. Select the Save icon. The name must be unique. You can also check to default the Start Date as Yesterday and the End Date as Today for most Reports. Once the filter is saved it is available in the Favourite Search Filters drop down, you do not need to re-enter your filters to run the Report.

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