

Animal Management Index

Contact support@Species360.org

Topics Covered

Searches

- [Searches](#)
- [Explanation of Species Counts](#)

Notes and Observations

Provisional Data Entry

Care and Welfare

Batch Action and Animal Lists

Animal Details

- [Basic Info](#)
- [Physical Holder History](#)
- [Ownership Transaction History](#)
- [Weights](#)
- [Contraception](#)
- [Enclosure and Occupants](#)
- [External Sharing](#)
- [Identifiers](#)
- [Parent Info](#)
- [Lengths](#)
- [Rearing](#)
- [Taxonomy / Sex Type / Collection](#)
- [Alerts](#)
- [Images](#)
- [Clutch/Litter ID](#)
- [Nest ID](#)

Animal More Details

- [Development Milestones](#)
- [Training Information](#)
- [Feed Logs](#)
- [Enrichment](#)
- [Responsible Party](#)
- [Birth/Hatch and Event Locations](#)
- [Permits](#)
- [Life Stages](#)
- [Management Plan](#)
- [Major Life Event](#)

Transactions

- [Accessions and Dispositions](#)
- [Fetuses and Birth Events](#)
- [Pending Transactions](#)
- [Incomplete Accessions](#)
- [Incomplete Dispositions](#)

Group Management

Egg Management

Estimating Dates

Searches

- [Searches](#)
 - **Description:** How to Search within the Husbandry module
 - **Features:**
 - Start search
 - Dashboard search
 - Animal Simple search

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

www.Species360.org – Global Information Serving Conservation

- Animal Advanced Search
 - Favourite search filters
- **Related Materials:**
 - [Animal Searches](#): Help document on the various ways to find animals in ZIMS
- **Explanation of Species Counts**
 - **Description:** Various ways to find species counts and why they are different
 - **Features:**
 - Why species counts are different
 - **Related Materials:**
 - [Explanation of Species Counts](#): Help document that explains the differences in species counts

[Back to Topics Covered](#)

Transactions

- **Accessions and Dispositions**
 - **Description:** How to record Accessions and Dispositions including simple Births and Deaths
 - **Features:**
 - Best Practices for Accessions
 - Auto-increment Local IDs
 - Time Saving Accessions
 - Recording new Accessions
 - Recording Visits
 - Recording Dispositions
 - **Related Materials:**
 - [Best Practices for Accessions](#): Document on the Best Practices for Accessions
 - [Auto-increment Local IDs](#): Help document on how to auto-increment your Local IDs
 - [Time Saving Accessions](#): Help document on time saving Accessions options
 - [Accessions](#): Help document on new Individual Accessions (with links to other entity Accessions)
 - [Recording Visits](#): Help document on recording Visits
 - [Dispositions](#): Help document on recording Dispositions
 - [Third Party Transactions](#): Examples of complicated three-party transactions in ZIMS.

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- **Fetuses and Birth Events**
 - **Description:** Recording Fetuses and events related to Them
 - **Features:**
 - Recording a Fetus
 - Recording a Birth Event
 - Recording a Fetal Death
 - **Related Materials:**
 - [Fetuses and Birth Events](#): Help document on recorded Fetuses and Birth/Death Events
- **Pending Transactions**
 - **Description:** How to complete Pending Transactions
 - **Features:**
 - Why Pending Transactions are important
 - How to complete Pending Transactions
 - Completing difficult Pending
 - **Related Materials:** [Pending Transactions](#): Help document on Pending Transactions
- **Incomplete Accessions**
 - **Description:** How to create and complete Incomplete Accessions
 - **Features:**
 - How an Incomplete Accession is created
 - How an Incomplete Accession is completed
 - **Related Materials:**
 - [Incomplete Accessions](#): Help document on creating and associating Incomplete Accessions
- **Incomplete Dispositions**
 - **Description:** How to create and complete Incomplete Dispositions
 - **Features:**
 - How an Incomplete Disposition is created
 - How an Incomplete Disposition is completed
 - Finalization of Death Terms
 - **Related Materials:**
 - [Incomplete Dispositions](#): Help document on Incomplete Dispositions

[Back to Topics Covered](#)

Group Management

Description: How to manage Groups

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

www.Species360.org – Global Information Serving Conservation

Features:

- Simple Group Management
- Advanced Group Management
- Group Explorer
- My Transactions and Groups
- Colonies
- Hatching a Group of Eggs

Related Materials:

- [Aquatics Index](#): See topic Group Management

[Back to Topics Covered](#)

Egg Management

Description: How to record information involving eggs

Features:

- Recording an Egg or Group or Eggs/Egg Mass
- Recording a Hatch Event for single/group of eggs
- Recording Death/Disposition of a single/group of eggs
- Splitting/Merging a Group of Eggs
- Eggs in Reports

Related Materials:

- [Managing Eggs](#): Help document on Managing Eggs

[Back to Topics Covered](#)

Estimating Dates

- **Description:** When and how to estimate dates
- **Features:**
 - When dates should be estimated
 - How to record Estimated Dates
- **Related Materials:**
 - [Estimating Dates](#): Help document on estimating dates

[Back to Topics Covered](#)

Animal Details

- [Basic Info](#)
 - **Description:** What displays in the Basic Info grid

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

-
- **Features:**
 - Source of the information
 - What information can be edited/updated and where you can do so
 - **Related Materials:**
 - [Basic Info](#): Help document on the source of the information and what can be edited and where
 - **Physical Holder History**
 - **Description:** How to interpret the Physical Holder History grid
 - **Features:**
 - What the columns mean
 - How to follow the transaction flow
 - **Related Materials:**
 - [Physical Holder History](#): Help document on understanding the grid
 - **Ownership Transaction History**
 - **Description:** How to interpret the Ownership Transaction History grid
 - **Features:**
 - What the columns mean
 - How to follow the flow
 - **Related Materials:**
 - [Ownership Transaction History](#): Help document on understanding the grid
 - **Weights**
 - **Description:** Adding weights to an animal record and viewing weight graphs
 - **Features:**
 - Adding weights
 - Viewing Weight Graph and evaluating questionable weights
 - **Related Materials:**
 - [Animal Weights](#): Help document on recording weights
 - **Contraception**
 - **Description:** How to use the Contraception grid
 - **Features:**
 - Adding Contraception
 - Marking Contraception Inactive
 - Searching for Contracepted animals
 - **Related Materials:**
 - [Contraception](#): Help document on Contraception

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- **Enclosure and Occupants**
 - **Description:** Moving Animals between Enclosures and using Occupants tab
 - **Features:**
 - Current and Historical moves
 - Recording moves when Allow Multiple Enclosure Assignments is selected
 - Recording Batch Enclosure Moves
 - Using the Occupants tab
 - **Related Materials:**
 - [Animal Enclosure Moves](#): Help document on moving animals between Enclosures
 - [Occupants Batch Actions](#): Help document on moving animals between Enclosures
 - [Batch Actions on Occupants Tab](#): PowerPoint on using the Occupants tab to perform batch actions

- **External Sharing**
 - **Description:** What data is shown Globally by default and what shoes when a record is Externally Shared
 - **Features:**
 - Data shared globally by default
 - Data shared with External Sharing
 - How to share a record
 - Finding records shared with you
 - **Related Materials:**
 - [External Sharing](#): Help document on Global Data and External Sharing

- **Identifiers**
 - **Description:** Adding, editing and deleting Identifiers
 - **Features:**
 - Adding Identifiers
 - Logical versus Physical Identifiers
 - Editing Identifiers
 - Transponders
 - Accepting another institution's Identifier as your own
 - **Related Materials:**
 - [Accepting an Identifier](#): PowerPoint on how to accept another institution's Identifier as your own
 - [Adding and Editing Identifiers](#): Help document for how to add and edit identifiers

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

-
- [Managing Transponders](#): Help document on how to manage the transponder inventory and record transponders in an animal record
 - **Parent Info**
 - **Description:** How to record and edit Parents
 - **Features:**
 - Adding and Editing Parents
 - Adding Parents not in ZIMS
 - Recording Unsexed Animals as Parents
 - Recording a Single Parent
 - **Related Materials:**
 - [Adding and Editing Parents](#): Help document on adding and editing Parents
 - [Recording Single Parent](#): Help document for recording parents for asexual or parthenogenic reproduction
 - **Lengths**
 - **Description:** Recording length measurements
 - **Features:**
 - Adding a new length measurement
 - Editing/deleting length measurements
 - Graphing length measurements
 - **Related Materials:**
 - [Adding Lengths](#): Help document on recording length measurements
 - **Rearing**
 - **Description:** How to record Rearing information
 - **Features:**
 - Recording Rearing during an Accession
 - Adding/editing/Updating Rearing from within the record
 - **Related Materials:**
 - [Adding Rearing](#): Help document on recording Rearing
 - **Taxonomy / Sex Type / Collection**
 - **Description:** Making changes/additions to Taxonomy, Sex Type and Contraception
 - **Features:**
 - Edit/add taxonomy within the record
 - Edit sex or record a Sex Change Event
 - Assign a Collection and record a Collection Change event

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- **Related Materials:**
 - [Taxonomy Change](#): Help document on editing and adding taxonomy within the record
 - [Editing Sex](#): Help document on adding a sex and adding a new sex
 - [Assigning Collections](#): Help document on assigning Collections to a record

- **Alerts**
 - **Description:** Adding Animal Alerts
 - **Features:**
 - How to add Animal Alerts
 - How to manage Animal Alerts in My Calendar
 - **Related Materials:**
 - [Adding Alerts](#): Help document on adding Animal Alerts
 - [Alert Search](#): Help document on finding your Animal Alerts
 - [Managing the Calendar](#): Help with the Calendar in ZIMS

- **Images**
 - **Description:** Where and how to add images in ZIMS
 - **Features:**
 - Where you can add images
 - How to resize your images
 - **Related Materials:**
 - [Adding Images](#): Help document on how and where you can add images in ZIMS

- **Clutch/Litter ID**
 - **Description:** Where to add/edit Clutch/Litter ID
 - **Features:**
 - Where to add/edit Clutch/Litter ID
 - Where Clutch/Litter is displayed in the animal record
 - **Related Materials:**
 - [Clutch/Litter ID](#): Help document on how to record, assign and edit a Clutch/Litter
 - [Clutch/Litter Search](#): Help document on finding your Clutches/Litters

- **Nest ID**
 - **Description:** Where to add/edit Nest ID
 - **Features:**
 - Where to add/edit Nest ID

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- Where Nest ID is displayed in the animal record
- **Related Materials:**
 - [Nest ID](#): Help document on recording Nest ID

[Back to Topics Covered](#)

Animal More Details

- **Development Milestones**
 - **Description:** Adding Development Milestones
 - **Features:**
 - What a Milestone is
 - Adding Milestones
 - **Related Materials:**
 - [Development Milestones](#): Help document on recording Development Milestones

- **Training Information**
 - **Description:** How to use the Training grid
 - **Features:**
 - Creating a Training Definition
 - Editing and Deleting a Training Definition
 - Assigning Training to an Animal
 - Recording Training Sessions
 - Changing Training Status
 - **Related Materials:**
 - [Training Grid](#): PowerPoint on capturing Training information
 - [Training Definitions Search](#): Help document on searching for your Training Definitions
 - [Training](#): Help document on using the Training grid

- **Feed Logs**
 - **Description:** Creating a Feed Log Record
 - **Features:**
 - Using the Feed Log
 - Searching the Feed Log records
 - **Related Materials:**
 - [Feed Log Grid](#): Help document for using the Feed Log grid
 - [Feed Log](#): PowerPoint on using the Feed Log

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

www.Species360.org – Global Information Serving Conservation

- **Enrichment**
 - **Description:** How to use the Enrichment grid
 - **Features:**
 - How to create an Enrichment Item
 - How to assign an Item to a record
 - How to record a session using the Item
 - **Related Materials:**
 - [Enrichment PPT](#): PowerPoint on using the Enrichment grid
 - [Enrichment Grid](#): Help document on using the Enrichment grid

- **Responsible Party**
 - **Description:** Using the Responsible Party grid
 - **Features:**
 - How to add a Responsible Party
 - How to mark a Responsible Party Inactive
 - How to search for a Responsible Party
 - **Related Materials:**
 - [Responsible Party](#): Help document on using the Responsible Party grid

- **Birth/Hatch Date and Event Locations**
 - **Description:** How to use the Birth/Hatch Date and Event Location grid
 - **Features:**
 - What information is captured
 - What data can be edited from the grid
 - What data can be added from the grid
 - **Related Materials:**
 - [Event Locations](#)

- **Permits**
 - **Description:** How to Assign Permits to a record
 - **Features:**
 - How to Assign a Permit
 - How to Edit/Delete a Permit
 - **Related Materials:**
 - [Assigning Permits](#): Help document on assigning Permits to an animal record

- **Life Stages**
 - **Description:** How to record Life Stages
 - **Features:**

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

- What a Life Stage is
 - How to add Life Stages
 - **Related Materials:**
 - [Life Stages](#): Help document on recording Life Stages
- **Management Plan**
 - **Description:** How to record Management Plans
 - **Features:**
 - Recording Management Plans
 - Updating Management Plans
 - **Related Materials:**
 - [Management Plan](#): Help document on recording Management Plans
- **Major Life Event**
 - **Description:** Viewing the Major Life Events tab
 - **Features:**
 - What is displayed in the Major Life Events tab
 - **Related Materials:**
 - [Major Life Events](#): Help document on the Major Life Events tab

[Back to Topics Covered](#)

Notes and Observations

Description: How to record Notes and Observations

Features:

- The difference between a Note and an Observation
- Recording a Note or Observation
- How to write good Notes
- Using Voice Recognition
- How to edit Notes sourced from other data entry screens
- Searching for Notes and Observations
- Note Templates

Related Materials:

- [Writing Good Notes](#): A Tips and Tricks recorded Webinar on writing good Notes
- [Voice Recognition](#): Help document on using Voice Recognition
- [Adding Notes or Observations](#): Help document on adding Notes/Observations
- [Editing Notes](#): Help document on editing Notes sourced from other data entry screens
- [Note Templates](#): Help document on managing Note Templates

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

www.Species360.org – Global Information Serving Conservation

-
- [Best Practices for Notes](#): PowerPoint on Notes and Observations geared at non-records keeping staff entries
 - [Note Definitions and Sharing](#): Excel file with the definitions of Note Types and Subtypes and global sharing status

[Back to Topics Covered](#)

Provisional Data Entry

Description: How to set up and use Provisional Data Entry

Features:

- How to activate the functionality
- How to enter and recognize Provisional Data
- How to Approve/Reject Provisional Data
- Provisional Data in Reports

Related Materials:

- [Provisional Help](#) – Help document on Provisional Data Entry
- [Provisional PPT](#) – PowerPoint on Provisional Data Entry

[Back to Topics Covered](#)

Care and Welfare

Description: How to use the Care and Welfare module

Features:

- How to activate the module
- How to configure Indicators
- How to create and use Templates
- How to use Charts
- Best Practice Suggestions
- Editing Rules

Related Materials:

- [Care and Welfare](#) – Help document on using the module
- [Care and Welfare PPT](#) – PowerPoint on using the module
- Global Indicators – Excel file with descriptions of the Species360 Global Indicators

[Back to Topics Covered](#)

Batch Actions and Animal Lists

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

Description: How to create and use Animal Lists and save data entry time by using Batch Actions

Features:

- Creating Animal Lists
- Recording Batch Actions
- Difference between single and custom entries

Related Materials:

- [Animal Lists](#): Help document on Animal Lists
- [Batch Actions](#): Help document on recording Batch Actions

[Back to Topics Covered](#)

Revised 14 September 2023