Contact Us!
Follow Us!

Preparing for a Regional Association ZIMS Training

ZIMS training can be a great learning experience for both the instructors and the attendees if you are well prepared for it. Start planning as soon as you know the training date. Do not wait until the last minute!

Thank you for your dedication and critical support in training ZIMS in your region! This guide should help answer common questions that are faced when hosting a regional ZIMS training.

If you have any questions do not hesitate to contact training@species360.org .

Index of Topics

Know Your Audience

Your audience may be one or more of the following:

- Inexperienced Registrars/Records Keepers
- Experienced Registrars/Records Keepers
- Curators/Collection Managers
- Veterinarians
- Studbook Keepers
- Keepers/Aquarists
- Researchers
- Educators
- Other Staff/Volunteers

It is easier to develop a ZIMS training session when your attendees are of the same experience/job type but that is not usually the case. It is possible to develop an effective training session for a mixed group of attendees and we have found that a diverse audience often results in a more successful session as they exchange ideas and experience. In addition to holding varied jobs your, audience may have varying degrees of computer skills and experience with ZIMS

One way is to get to know your audience before the session starts by sending out a questionnaire prior to the session. If your questions are selected carefully the results will help guide your presentations, attendee pairings (if needing to share computers) and will shape the exercises you provide. You should try to get the results back no later than two weeks before the session so that you can use the results to help you fine tune the instruction. The format of the survey could be a document emailed to attendees and returned, or a computer program such as Survey Monkey could be used.

Some questions to consider are:

1. My Institution is ___________________
2. My title is ________________________
3. I am:
    a. Responsible for the main records-keeping duties at my institution
        i. Husbandry
        ii. Medical
        iii. Studbooks
        iv. Both
    b. Responsible for doing some data entry
        i. Husbandry
        ii. Medical
        iii. Both
    c. Not responsible for any record-keeping duties
    d. Responsible for managing my institution's staff
4. I have used ZIMS for ____________ years
5. I need the following special seating arrangements (example front of room, on the aisle):
6. What I hope to get out of this training session is:

Back to Index of Topics

Instructor/Attendee Ratio

It is recommended that an instructor/attendee ratio be 1 instructor to 10 attendees. The maximum recommended is 1 to 20. If the sessions are strictly presentations, then the attendee ratio can go much higher. If there will be walk-throughs (instructor showing on screen how to do something and attendees doing the same data entry) or exercises (attendees doing data entry without the direct guidance of an instructor), a ratio of 2+ instructors to 10 attendees is recommended. In walk-throughs, if anyone gets behind, the entire presentation must stop until they catch up. Having an additional instructors other than the presenter is needed to help keep everyone up to speed.

Attendee Pairings

You will need to decide if attendees will be working on their own or in pairings. Pairings have many advantages:

- Fewer computers are needed (unless the attendees are bringing their own to use) and hence fewer power connections
- You need to create/arrange fewer institutions and log ins
- Working with someone with more/less ZIMS experience can be beneficial to both
- Working with someone of a different job type provides different approaches to using ZIMS
- New friendships can be made!

In 20 years of teaching the AZA Institutional Record Keeping course we have found that pairing people of varying backgrounds has worked very well. Pairing a keeper with a veterinarian or a curator with a Registrar allows for the ability to share experiences and varying approaches to record-keeping. And pairing an experienced person with an inexperienced one allows the experienced person to mentor the less experienced person and help them move along faster. In return, the inexperienced person provides new insight to someone who may be somewhat set in their ways but is open to new ideas.

Back to Index of Topics

Host Preparations

To get off to a good start and have a successful training session you should be well prepared before the start. For the room:

- Make sure the presentation space is sufficient to accommodate the number of attendees
  - Attendees should not be blocked in by their seating
  - Room between computers/pairs should be sufficient for note taking, etc.
- Make sure the projector screen is visible by all attendees
  - Are there supports or anything blocking easy view
  - Will some attendees be too far to either side to easily view the screen
- Can the room temperature be manually controlled
- There are sufficient power sources for all attendees
- Check lighting – can the room be darkened enough to view the presentations on the screen and do you know how to operate it
- Will you need audio amplification so all attendees can hear your presentation?

Computers can be sourced in three ways:

- Bring Your Own ***Recommended***

- Upside = No cost
- Downside = Everyone is working on different hardware
- Downside = They don't always bring what you ask them to

- Contract/rental
  - Upside = everyone should be working on the same hardware
  - Downside = Cost
  - Downside = You don't always get what you want
  - Recommendation = If Species 360 staff is going to be present, we recommend some overlap time with the hardware installers to assure all is working properly
  - Recommendation = Order at least one extra computer as a backup should you need to swap one out.
- Loaned from company or Association
  - Upside = No cost
  - Downside = They are often very outdated

Regardless of how you source your computers, be VERY clear on the hardware requirements. Note that wireless/WiFi is required. Google Chrome should be installed as it is the recommended browser for ZIMS. ZIMS does not function as well on a tablet, so those are not recommended. If attendees are bringing a work-issued laptop, advise that they request administrator permissions to their laptop should last minute troubleshooting be required. Following these recommendations will help ensure your session starts on time and minimizes the chance that your attendees may not be able to work at all!

For the computer set up:

- There is broadband internet access >2Mbs wired/wireless
  - If wired make sure you have enough cables
  - If wireless check the room for "dead" spots
- Make sure that all log ins work prior to the start (see Application Preparation below)
- If possible, a second monitor and a keyboard can be of great help when using pairs
- Check that the projector and the presentation computer are compatible
- Make sure you have sufficient power cords and they are secured safely

Back to Index of Topics

Application Preparation

For most training sessions you will be using a ZIMS build that is dedicated to training. You will need to contact training@Species360.org at least one month before the training session so they can determine which database will work best for your training.

List of Training Environments:

- https://LearnZIMS.species360.org (training database with no 'real data')
- https://ZIMSTraining.species360.org (a copy of live ZIMS created on request)
- https://LearnStudbooks.species360.org (training database with no 'real global animal data' but specified SPARKS/PopLink Migrated data – extended set-up required in this environment and 2-3 months notice requested)

Only in rare circumstances will the attendees be working in their actual live ZIMS database. Using our training environments ensures that while your attendees are learning no changes are being made in their true ZIMS data.
Recommended that you do NOT use Live ZIMS for training

You may need to have institutions created by Species360 for your training. You can then add Staff, create log ins and assign Roles. Some suggestions for making this easier are:

- Contact training@Species360.org at least two weeks before the training session so they can create the required number of institutions
  - If attendees are working alone it will be the number of attendees.
  - If they are working in pairs it will be the number of pairs
- Contact training@Species360.org and let them know who will be entering the Staff members as they will need to be promoted to a Local Admin Role in their training environment
- Species360 will let you know when these steps are completed
- Log into the training environment with your User Name and Password that was given to you by Species360.
- You will then add Staff, create logins and assign Roles

To add Staff, create logins and assign Roles follow these steps:

- Go to Start > Switch Institution > Select appropriate Child Institution
- Start > Select Institution > My Institution >
- Staff grid > Actions > Add New Staff
- Complete at least the mandatory fields (red asterisk)
- The email must be a true email address which must be confirmed prior to being able to log into ZIMS. If you are creating "fake" Staff members, here is a workaround:
  - **Shared Email Account?**
    What if I need to add attendees but only have one email address (ex: all attendee accounts use the same address keepers@OurZoo.org?)
  - A free solution is available via a google email account.
  - 1.Sign up for a GMAIL account (example: ourzookeepers@gmail.com)
  - 2.Set it up to forward to your shared email address
  - 3.Test send email to the gmail address to ensure it is forwarding to your shared account

- 4.Update your users in ZIMS using the following gmail trick to provide them with a unique email address. Add a "+" after the email address you chose and the @gmail.com to have an infinite amount of email addresses forwarding to your shared account.
  Ex: ourzookeepers+SALLYKEEPER@gmail.com, ourzookeepers+JONNYKEEPER@gmail.com, ourzookeepers+ECT@gmail.com
  - 5. A variation of this trick is available for Yahoo and Hotmail/Outlook as well.
- Select the Staff member > Actions > View/Edit ZIMS Login Details
- Check the ZIMS User box to activate the screen
  - If you are creating fake Users you can keep it simple by creating a User Name that is actually the same as the institution name. This User name must be unique and cannot be changed
  - Keep the Password simple – PASSWORD1 is easy to remember and can be used for all Users
  - Move the Local Admin (Species360) Role to the right hand box and Save
- Select the Staff member > View/Assign Medical Roles
  - Move the Medical Admin (Species360) Role to the right hand box and Save

Keeping things simple as suggested above will help guard against possibly forgetting log in information that can slow the session down.

HINT: ALWAYS CHECK EACH INSTITUTION'S LOG IN PRIOR TO THE SESSION!!

Back to Index of Topics

What Could Possibly Go Wrong?

No matter how much you prepare things can always go wrong. Some of these you can prepare for and some you cannot. The following are some examples of things that have happened to us in the twenty years of teaching the AZA records-keeping course and other ZIMS on-site trainings:

- Computers
  - The rented computers all had viruses
  - No power cords were delivered/available
  - Wireless cards needed to be swapped out
- Attendee Issues
  - Had no idea what the password was to open their borrowed computer
  - Brought tablet (ZIMS not yet perfectly functional on a tablet)
  - Forgot to bring power cable
  - Had no administrative privileges (can limit accessing wireless connections and can block websites)
  - Limitations on installation of software
- Infrastructure

  - Fire alarm went off in the middle of a session
  - Internet was lost
  - Electricity was lost
  - Room was locked and no one had access
  - Room was in use by another meeting
- Presentation
  - An attendee disagreed with an instructor
  - The instructors disagreed with each other
  - PowerPoint slides got out of order

Provide a ZIMS Navigation Overview

If you have any attendees with little or no experience in ZIMS it is a good idea to offer a short navigation session prior to the start of training. This will help them get an idea of how to move around the application, so they do not get behind in the walkthroughs or exercises because they do not know where to go to do what they need to do. Try to allow 30 – 45 minutes for this introduction. It is best to do this introduction using an institution that actually has data in it as the institutions you will be using are starting with a blank database. Contact training@Species360.org to obtain information on how to access such an institution. Topics to cover include:

- Logging In
- Topics in the Start Menu
  - Accessions
  - Medical
  - Studbooks
  - Logout
  - Preferences
  - Tools
  - Security Tools
- Animal Searches
  - Local Search from Start
  - Global Search from upper left search bar (with Institution filter)
  - Animal Simple Search
  - Animal Advanced Search
- Animal Statistics
  - Pending Transactions
  - Incomplete Accessions
  - Incomplete Dispositions
  - Pending Taxonomic Changes
  - Recent Animals
  - Recent Search List

- Animal Record
    - Topics in Details tab
    - Topics in More Details tab
    - My Transactions
- Help Menu

Monographs

If you want to develop monographs you can, but Species360 has a library of documents and PowerPoints that can be reviewed before the training session.
Go to:
http://training.species360.org/HusbandryLibrary/
http://training.species360.org/AquaticsLibrary/
http://training.species360.org/StudbooksLibrary/
http://training.species360.org/MedicalLibrary/
…to view the lists of available content based on topics. Additionally, under the help menu in ZIMS you can search our exhaustive help library: http://training.species360.org/Help/ for any additional resources you may need.

Back to Index of Topics

The Session Presentations

Variety will keep the sessions interesting and not everyone has the same presentation style, but we have found that following these steps in presenting a ZIMS topic has been very successful.

1. Start with a Lecture/PowerPoint/Other
    a. Introduce the topic to be covered
    b. Include Best Practices for the topic
    c. Note what staff members may use the topic the most
    d. Define any new terms that may be encountered in the topic
    e. Handing out copies of the PowerPoints (four or six per page) allows attendees to take notes on each slide if desired
2. Follow up with a Walkthrough
    a. Instructor walks through entering the topic into ZIMS
    b. Students follow along and enter the same data themselves
    c. This is where additional instructors can be a great help because if one attendee/pair gets behind the entire walkthrough must stop until they catch up. It also helps to have a "driver" entering the data so the presenter can be more aware of the attendees.
    d. Come up with an alternative to attendees holding their hands up if they have a question. In the AZA class we use small stuffed animals that are placed on top of the monitors. This gives the instructors immediate notification and allows the attendees to

continue working until they get instructor assistance. This alternative could be as easy as a small piece of folded paper that says Help! to place on a corner of the monitor.

3. End with Exercises
    a. Immediately after the lecture and walkthrough provide the time for topic exercises without the help of a guiding instructor
    b. This is another place where additional instructors help make the sessions go smoothly
4. Provide feedback
    a. Instructors can review the exercise right from their computer if they are given access prior to the session. This eliminates the need for handing in and reviewing printed reports

Avoid PowerPoint Fatigue

Although PowerPoints are usually the easiest way to present an overview of a topic, they can get very tedious if used too much. Some ideas for other presentation styles are:

- Panel discussions
- Attendee involvement with responding to instructor questions
- Come up with a game!

Choosing your Topics

The audience should drive the topic selection. Some topics need to be covered in a specific order as they either build on each other (Accessions should come before Births so you have Parents in the database), or local lists must first be made available to select from (Your Staff, Enclosures and Collections are fields in Accession screens).

Back to Index of Topics

The following is a topic flow that works. Those topics that have ZIMS data entry involved, and should have walkthroughs and exercises associated with them are noted with (ZIMS).

- Getting Help
    - Review of using the Help Menu
- Records and Data
    - The Big Picture why animal records are so important
- ZIMS – Getting Started
    - A brief review of ZIMS functionality and navigation
- Animal Care and Welfare
- Organization of My Institution (ZIMS)
    - Setting Preferences
    - Adding Staff, Roles, Teams, Departments and Collections
- Accessions and Dispositions (ZIMS)

    - First entry into ZIMS. This is not acquiring from a Species360 member where the record will already be in the ZIMS database
- Estimating Dates
    - Using the estimating options correctly
- Enclosure Tree Development (ZIMS)
    - Building your Parent and Child Enclosures
- Creating Visits (ZIMS)
    - Species360 member to Species360 member transactions
- Animal Measurements (ZIMS)
    - Weights and Lengths
- Animal Identifiers (ZIMS)
    - Logical and Physical
    - Accepting another institution's as a Local ID
- Notes and Observations (ZIMS)
    - Animal and Enclosure Modules
- Taxonomy
- Sex and Contraception (ZIMS)
- Group Records (ZIMS)
    - When to record a Group record
    - Splits and Merges
- Permits
    - Overview of what your region requires
    - Hints to permit preparation
- Life Stages and Development Milestones (ZIMS)
    - The difference and when to use these
- Training Information (ZIMS)
    - Creating a training routine
    - Creating a training session for that routine
- Enrichment Information (ZIMS)
    - Creating an Enrichment item
    - Creating an Enrichment session for that item
- Introduction to Medical Module (ZIMS)
    - Husbandry/Medical interface
- Reports and Tools (ZIMS)

If your audience represents aquariums you may want to add the following topics:

- Collection Trips
- Aquarist Daily Log/Husbandry Log

- Life Supports and Components
- Measurement Range Template

Back to Index of Topics

Developing Exercises

If you are starting with a blank database (LearnZIMS), no animals or enclosures have been entered. Design your exercises to build on each other.

- If you have to have an animal in the database to use later, possibly as a parent, get those animals entered during the walk-throughs to make sure they are there for selection. Attendees will not do their exercises at the same speed.
- Your first accessions will be From Another Institution (Species360 non-members), Appeared, Rescued and Collected From Wild

You may want to create an Excel file that you can cross-reference to make sure that your exercises are logical. Some logical things to check for are:

- Were the Parents you are using for a Birth/Hatch actually old enough to reproduce?
- Was the animal you are adding a transponder to alive on the date that you are using for the identifier?
- If you are collecting an animal from the wild is it actually found in the location you are using?
- The disposition date is before the acquisition date

As a final double check it is always a good idea to actually enter your exercises into ZIMS. This will help you catch a lot of problems that you did not see when creating the exercises. During the training sessions thinks tend to snowball as one error may affect other exercises down the line resulting in wasted time and confusion for the attendees.

As ZIMS functionality continues to increase you may need to review your Topics and update your exercises annually to make sure you are covering all the relevant ones.

Back to Index of Topics

The Regional Association's Role in ZIMS Studbooks

If you are training Studbooks, there will be additional conversations with Species360 in advance of the event, a reminder that setting up and managing Studbooks access is the responsibility of a regional association.

As a Regional Association you would have access to all the Association's studbooks. They also have three responsibilities:

1. Manage Association's Studbook Roles

2. Assign Users and their Roles to Studbooks
3. Create any new studbooks and assign Users (currently no new studbooks are being created)

To view an Association's studbooks, you must first be assigned as a regional association manager (contact Training@species360.org with questions).

From Start > Institution > My Institution. There should be a "Studbook" tab next to the Details tab. If you do not see it contact Species360 to have a Global Administrator assign you the correct Role.

Selecting this tab will display a list of all of your Association's Studbooks. Click on the species hyperlink to open the details about the Studbook.

Regional Associations are charged with creating their own Role access for their Studbooks. These Roles are across the board for all Studbooks being managed by your Association. To add a Role go to Studbook Roles > Actions > Add New Role. The Role Name must be unique to your Association. If you check the "Allow studbook user to assign this role" then the Studbook Keepers can assign people to this Role, saving the Association from having to keep it updated.

You then need to assign access to this Role. Select the Role > Actions > Manage Role Access. The module will default to Studbook. Roles are assigned for Search/View, Add, Edit and Remove data. Check and uncheck the access you want the Role to have. For example you would not want to give a Nutrition Advisor access to assigning people to the Studbook but you would want to give that access to the Studbook Keeper and also possibly to the Species Coordinator.

To assign people to a Studbook go back to your Studbook list and highlight the appropriate Studbook > Actions > Assign Person to Studbook. Or, you can select the species hyperlink and open the Studbook Details > Studbook Assignments grid > Actions > Add New. The Association and Studbook Name will default. The person field will source from the staff members at the institution that you record. The Studbook Title is a list of various role types that can be associated with a Studbook such as TAG Chair and Nutrition Advisor. The Studbook Role that you assign is sourced from the Roles that you created earlier.

The actual Studbooks are found under Start > Studbook > Studbooks. A list of your Association's studbooks will display. Double clicking on one will open the Studbook dashboard from where you can select to View List for Living Animals in Studbook or All Animals in Studbook. From the list the Studbook ID is a hyperlink into the actual Studbook record.

Back to Index of Topics

Revised 11 July 2019