

ZIMS AND INSTITUTIONAL COLLECTION PLANNING

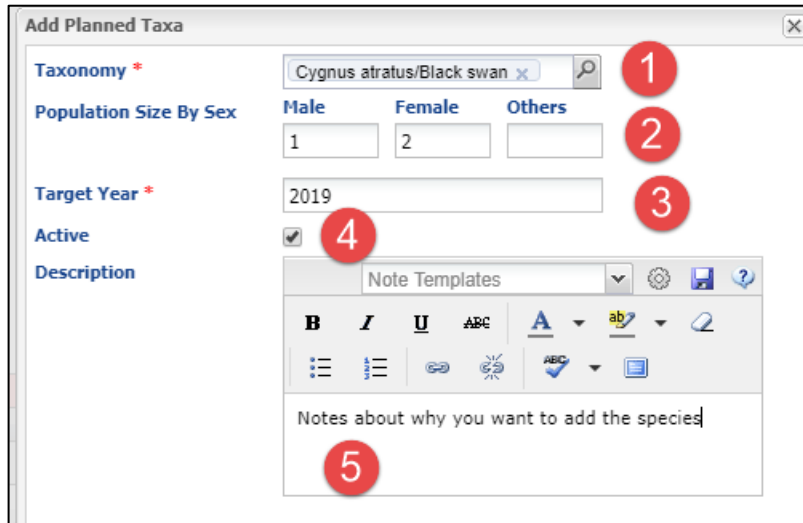
[Contact Species360 Support](#)

ZIMS has four functionalities that can help you capture your Institutional Collection Plan information:

- [Planned Taxa](#) (within the Enclosure module)
- [Species Wanted](#) (within the Institution module)
- [Animals Available](#) (within the Institution module and the Animal record)
 - [Species Wanted and Animals Available Global Search](#)
- [Management Plan](#) (within the Animal record)

Planned Taxa

The Planned Taxa functionality allows you to enter species, numbers and year that you are planning to add that species to a specific enclosure. Planned Taxa is found under the Details tab in the enclosure record.





The screenshot shows the 'Add Planned Taxa' form with the following fields and callouts:

- 1. Taxonomy * (Text input: Cygnus atratus/Black swan)
- 2. Population Size By Sex (Male: 1, Female: 2, Others:)
- 3. Target Year * (Text input: 2019)
- 4. Active (Checked checkbox)
- 5. Description (Rich text editor with a note: Notes about why you want to add the species)



1. Record the species desired.
2. Record the number desired.
3. Record the year that you wish to add the species.
4. Check the box if this is an Active plan.
5. Add any notes about why you want to add the species.

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Planned Taxa				
Taxonomy	Scientific Name	Target Population By Sex	Year	Active
	Cygnus atratus	1.2.0	2019	✓
	Macropus parma	1.3.0	2020	✓
	Macropus rufogriseus	1.3.0	2020	✓
	Macropus rufus	1.2.0	2021	✗

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Your Planned Taxa will display in the grid. If it is an Active plan the Active column will display a green checkmark. If it is no longer an Active plan a red “x” will display. Keeping Inactive plans in the grid, instead of deleting them, can be helpful. Above we see that red kangaroos (*Macropus rufus*) were at one time considered for the exhibit.

	Cygnus atratus	1.2.0	2019	✓
	Macropus parma	1.3.0	2020	✓
	Macropus rufogriseus	1.3.0	2020	✓
			2021	✗


Originally planned to add this species but after research the area was found to be too small

Hovering over the note lets you know that the species was considered at one point, but the area was found too small to hold them. Keeping Inactive plans in the grid helps you to not plan for an inappropriate taxa again.

Enclosure Search	Enclosure	Taxonomy	Male	Female	Other	Target Year	Active
Maintenance Search	Australia	Macropus parma / Parma wallaby	1	3	0	2020	✓
Enclosure Alert Search	Australia	Macropus rufus / Red kangaroo	1	2	0	2021	✗
Actual Physical Merge Search	Australia	Cygnus atratus / Black swan	1	2	0	2019	✓
Cleanup Error Search	Australia	Macropus rufogriseus / Red-necked wallaby	1	3	0	2020	✓
Measurement Template Search	Farm Yard	Ovis aries aries american tunis / American tunis sheep	1	3	0	2019	✓
Note / Observation Search	penguin exhibit pool	Spheniscus demersus / African penguin	3	4	0	2020	✓
	penguin exhibit pool	Eudyptula minor chathamensis / Chatham little blue penguin	4	4	0	2021	✓

Planned Taxa Search

Taxonomy



Filter By Taxonomy  1

Include Taxon Below

Target Year

2

Active 3

 Reset |  Search

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To search for your Planned Taxa for all enclosures use the Planned Taxa Search box in the Enclosure Search box.

1. You can limit to a specific taxonomy and select to include Taxon Below.
2. You can search by the Target Year.
3. You can limit the search to only Active plans.

The results will display in a grid with columns for Enclosure, Taxonomy, Sex numbers, Target Year and status. The columns can be sorted ascending or descending. The grid can also be exported to Excel or pdf for printing or emailing.

Species Wanted

Because we are looking for black swans and wallabies for our Australia exhibit we will add them as Species Wanted. Species Wanted is found in the Institution module.

Add New Wanted Species

Taxonomy Information

Any Scientific Name / Common Name * 1

Cygnus atratus/Black swan 2

Preferred Sex Types 3

Male, Female

Preferred LifeStages

Please Select

Terms and Details

Reason 4

Exhibit

Wanted Terms 5

Negotiable

Contact Person 6

Adrienne Miller

Willing to pay shipment

Effective Date 7 **Expiry Date**

Jan 01, 2019

Duration **UOM**

 Please Select

Available Type

Permanent Temporary 8

Transfer Level 9




Country Level Regional Level Global Level





Notes

Notes to Myself 10

Note Templates

B ***I*** **U** ABC

A ab   




   





Only your institution will see

Detail 11

Note Templates

B ***I*** **U** ABC

A ab   

All institutions will see

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1. Record the Scientific or Common Name. This is the only mandatory field, but providing more information is always a plus.
2. Provide the total number of animals you are looking for. This is a multiple select dropdown.
3. Enter the preferred sex types. You can also select Preferred Life Stages.
4. Providing the Reason may help others that see this listing. If they have an animal of the species you want, but you have selected Breeding as the Reason and the animal is permanently contracepted, they would not waste time contacting you.
5. The Wanted Terms are a multiple select dropdown.
6. Providing a contact name will help others reach the right person.
7. The Effective Date is the date that you can receive the animal. If it is not for two years and another institution has an animal of the species but they must place it immediately, that would not be a good match.
8. If you are looking to hold the species only for a period of time, that is important information to note.
9. Transfer Level will also let others know how far away you are willing to receive the animal from.
10. Notes to Myself will appear only to members of your institution.
11. Detail will display to all.



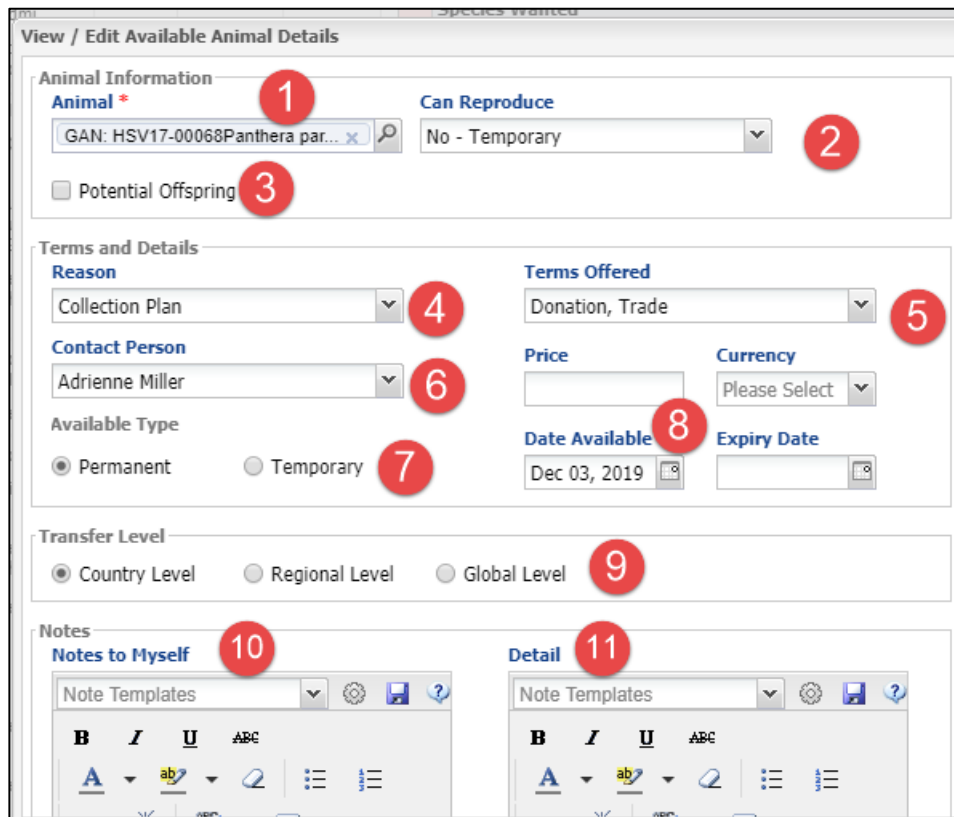
	Taxonomic Name	Wanted Date	Wanted Terms	Reason	Total Count	Contact Person	Transfer Level
	Macropus parma/cute little wallaby	Jan 01, 2020	[Donation]	Exhibit	4	Adrienne Miller	Regional
	Macropus rufogriseus/Red-necked wallaby	Jan 01, 2020	[Negotiable]	Exhibit	4	Adrienne Miller	Regional
	Cygnus atratus/Black swan	Jan 01, 2019	[Negotiable]	Exhibit	3	Adrienne Miller	Regional

The Species Wanted will display in a grid with columns for Taxonomic Name, Wanted Date, Wanted Terms, Reason, Total Count, Contact Person and Transfer Level.

Animals Available

Animals Available allows you to let other ZIMS institutions know about specific animals you want to place elsewhere. This is found in the Institution module and within the animal record itself.

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1. Record the GAN or Local ID of the animal. This is not required if done within the animal record. Similar to Species Wanted, this is the only mandatory field, but providing more information can be very helpful to others considering the animal.
2. Reproductive potential can be important information.
3. If the Potential Offspring button is checked that means you would be willing to breed this animal and the potential offspring would be available.
4. The Reason is a single select dropdown.
5. The Terms Offered is a multiple select dropdown.
6. The Contact Person will allow interested parties to contact the correct person.
7. If the animal is only available for a limited amount of time check Temporary.
8. The Date Available is important for people interested in the animal to know. If they need it immediately but it is not available for a year, they will not waste time contacting you.
9. The level of transfer you are willing to make may affect if others contact you.
10. Notes to Myself can be seen only by your institution staff.
11. Details can be seen by all.

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Animal	Local ID	Taxonomic Name	Sex	Available Date	Available Type	Reason	Contact Person	Transfer Level
HSV17-00068	M17011	Panthera pardus orientalis/Amur leopard	Male	Dec 03, 2019	Permanent	Collection Plan	Adrienne Miller	Country Level
MIG12-29858191	XCA018	Pongo pygmaeus pygmaeus/Northwest Bornean orangutan	Male	Nov 12, 2018	Permanent	Climate	Adrienne Miller	Country Level
MIG12-28191509	XXA043	Sus scrofa/Wild boar	Male	Nov 08, 2018	Temporary	Renovation	Adrienne Miller	Country Level

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The Animals Available will display in the grid. The columns can be sorted ascending or descending. The grid can be exported to Excel or pdf for printing or emailing.

To make the animal available from within the record itself go to Details > Actions > Add Animal to Animals Available List. Potential Offspring checkbox is not available if you use this approach.

Animals will be automatically removed from the available list if they have been dispositioned from your institution both physically and in ownership.

For individual records, the animal is removed from the list when any of the following have been recorded:

- Death (physical and ownership)
- Missing (physical and ownership)
- Release to wild (physical and ownership)
- To another institution (physical and ownership)
- Undetermined/indeterminate
- Loan return to owner

For group records, the animals will be removed from the available list when any of the following **Full Dispositions** have been recorded:

- Death
- Close out
- Missing (physical and ownership)
- Release to wild (physical and ownership)
- To another institution (physical and ownership)
- Undetermined/indeterminate

Group records will not be removed from the list following any partial dispositions (e.g. death in group). If any transactions cause the census of a group to reach zero but remain

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open, this will be reflected in the available list, but the group will only be removed from the list once it has been closed.

Note - The auto-remove from available functionality was released in March 2022 and only applies to dispositions after that date. Any animals dispositioned from your institution before that date will need to be manually removed from your available list.

Species Wanted and Animals Available Global Searches

The main advantage of recording your Species Wanted and Animals Available is that you can search for them globally, finding what others have entered. If you have included species in your Collection Plan that are just not available, you may want to reconsider. To search for Species Wanted and Animal Available use the appropriate search in the Institution Search box in the Institution module.

Because we are trying to place a grey wolf, we do a Species Wanted search to see if anyone is looking for one. The search defaults to animals in your Regional Association. None were found in our Regional Association, but opening up the search gave some results. A yellow row indicates the institution is within your country and this helps you filter the results.

Taxonomy Name	Institution Name	Sex	Count	Wanted Date	Contact Name	Wanted Type	Transfer Level	Detail
Canis lupus/Gra...	STFR WOLF	Female	2	Aug 12, 2017	Gentry Leonard	Permanent	Global	Looking for two ...
Canis lupus arct...	HERBERSTIN	Male, Female		Sep 27, 2017	Martha Moritz	Permanent	Regional	
Canis lupus arct...	SIBIU Z	Female		Nov 03, 2016		Permanent	Regional	
Canis lupus arct...	NYIREGYHA	Male	1	Aug 05, 2016	Endre Papp	Permanent	Global	Exchange prefe...
Canis lupus pall...	PUNE	Male, Female	4	Aug 23, 2016	Rajkumar Vittha...	Permanent	Regional	
Canis lupus pall...	BANNERGHA	Female	2			Permanent	Country	

Because we are interested in adding wallabies to our Australia exhibit, we did an Animals Available

Search by Macropus and checked the Include Taxon below checkbox.

Taxonomy Name	Institution Name	Animal Local ID	Sex	Available Date	Price
Macropus rufog...	TEMAIKEN	[TK129146/TE...	Male	Jan 22, 2018	0.00

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There is only one wallaby listed in our Regional Association, so we want to expand our search. Using the dropdown we uncheck AZA and select Go.

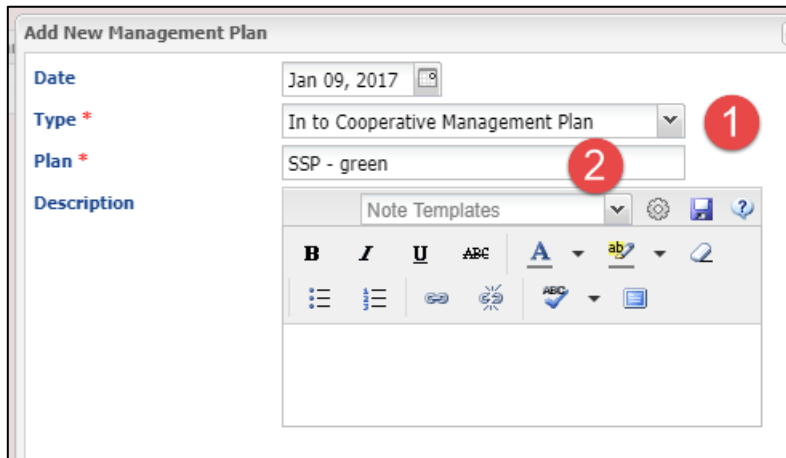
Regional Association <input type="text" value="Please Select"/> <input type="button" value="Go"/>								
Taxonomy Name	Institution Name	Animal Local ID	Sex	Available Date	Price	Currency	Contact Name	Reason
Macropus agilis...	MUNICH	[008125/MUNICH]	Male	Jan 25, 2018	0.00		Beatrix Köhler	
Macropus euge...	AMERSFOOR	Available Macro...	2.0.0	Jan 10, 2018	0.00		Niils Dijkgraaf	Surplus
Macropus fuligi...	BASEL	[170547/BASEL]	Male	Nov 06, 2017	0.00		Adrian Baumeyer	Surplus
Macropus fuligi...	SO LAKES	Macropus fuligi...	4.0.0	Aug 29, 2017	0.00		Kim Banks	Breeding
Macropus parm...	SO LAKES	Macropus parma	2.3.0	Aug 29, 2017	0.00		Kim Banks	Surplus
Macropus rufog...	TEMAIKEN	[TK129146/TE...	Male	Jan 22, 2018	0.00		Julieta Esmaim...	Surplus
Macropus rufog...	EXMOOR	[269636/EXMO...	Male	Jul 13, 2017	0.00		Danny Reynolds	Surplus
Macropus rufog...	KAUNAS	[DMR008/KAU...	Female	Sep 20, 2016	0.00		Benas Noreikis	Collection Plan
Macropus rufog...	EXMOOR	[269637/EXMO...	Male	Jul 13, 2017	0.00		Danny Reynolds	Surplus
Macropus rufog...	EXMOOR	[269635/EXMO...	Female	Jul 13, 2017	0.00		Danny Reynolds	Surplus
Macropus rufog...	EXMOOR	[269638/EXMQ...	Male	Jul 13, 2017	0.00		Danny Reynolds	Surplus
Macropus rufog...	KAUNAS	[DMR009/KAU...	Male	Sep 20, 2016	0.00		Benas Noreikis	Surplus
Macropus rufog...	KAUNAS	[DMR010/KAU...	Male	Sep 20, 2016	0.00		Benas Noreikis	Surplus
Macropus rufog...	THOIRY	[B7067/THOIRY]	Male	Oct 24, 2017	0.00		Christophe Gro...	Surplus
Macropus rufog...	PARIS JP	[MB7136/PARI...	Male	Jan 16, 2018	0.00		Elodie Rey	
Macropus rufog...	PARIS JP	[MB7132/PARI...	Male	Jan 16, 2018	0.00		Elodie Rey	
Macropus rufog...	PARIS JP	[MB7133/PARI...	Male	Jan 16, 2018	0.00		Elodie Rey	
Macropus rufog...	KAUNAS	[DMR007/KAU...	Female	Sep 20, 2016	0.00		Benas Noreikis	Collection Plan
Macropus rufog...	PARIS JP	[MB7135/PARI...	Male	Jan 16, 2018	0.00		Elodie Rey	
Macropus rufog...	LESNA	[217161/LESNA]	Male	Nov 07, 2017	0.00		Marketa Horska	Surplus

The number of results is greatly increased. The Animal Local ID is a hyperlink that takes you directly into the global record for the species.

Management Plan

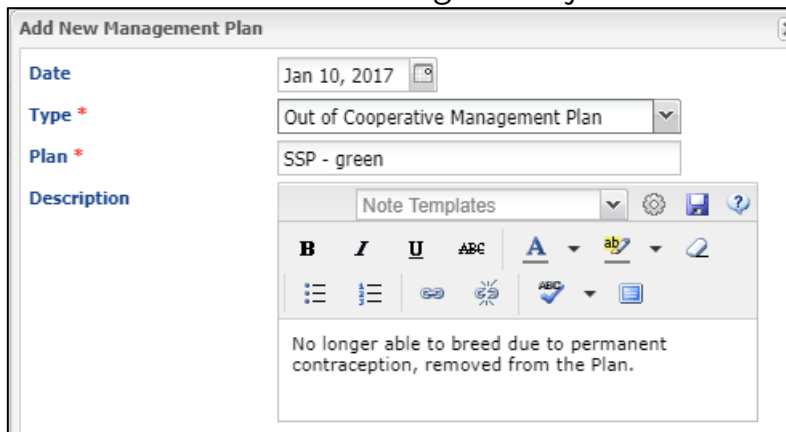
Many institutions like to hold a majority of species that are in managed populations such as studbook and Species Survival Plan species. Within the animal record you can indicate if the species is being managed.

Go to [More Details > Management Plan](#).



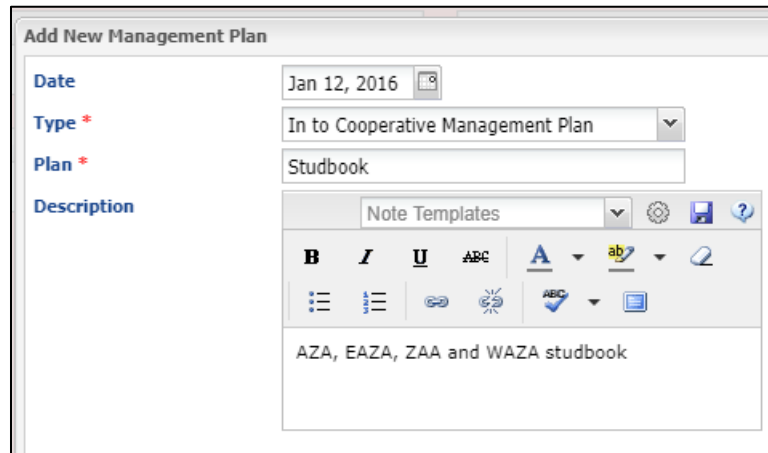
1. You have the option to record if it is an active member of a Management Plan or if, for some reason the animal is removed from the Management Plan.
2. You then record the Plan. The Species Survival Plans in North America are managed at color levels depending on the population viability.

If animals are removed from a Managed Plan you can include notes as to why.

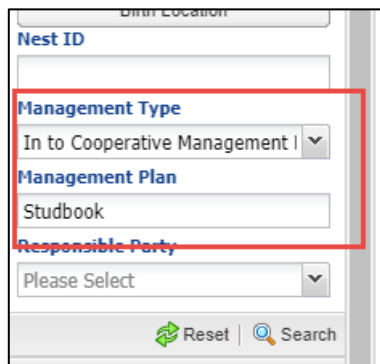


You can also indicate if it is a studbook species.

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Using Advanced Animal Search you can search for all your animals included in various Management Plans and the results will display in a grid that can be exported to Excel or pdf.



Revised 24 March 2023

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