ZIMS for Studbooks 2020 Released Functionality

Below is a list of feature enhancements and new functionality that has been released in ZIMS for Studbooks throughout 2020

Contact Species360 Support

2020 Deliveries

Census Report and Graph: The census report, census detail, and census graph have been combined into one tool named "Census Report and Graph" under the tools menu.
- The new report contains all of the raw data calculations as well as the visual graph. Users can choose to run the graph or report from the filter screen and once it is created there is a button in the report to view the other report so they will not need to re-run the filters.
- The new graph option displays all information included in the census report.
- Currently the graph can be broken down by sex or birth type by using the toggle at the bottom of the tool. Or select the Transactions box to see all the transaction event details in the graph. Click on the legend to add or remove values from displaying in the graph.
- Users can zoom in to see a specific date range on the graph by clicking and dragging the mouse over the area.
- The graph can be exported in multiple different formats. The graph will export as displayed on the screen, so if the user has zoomed in or highlighted a year the export will reflect that view.
  - You can change the size of the studbook module as well to change the shape of the graph prior to exporting.
- Role control for this tool has been combined and is under Census report. If the view option is selected for census report it will give the user access to the full combined report and graph.

Studbook ID automatically displaying in Husbandry animal identifier grid: This was a highly requested feature by Studbooks and Husbandry users. All Husbandry animals that are linked to an animal within a studbook will now automatically display the Studbook ID in the identifier grid as a global identifier. If a studbook animal is unlinked or deleted in the studbook, then the identifier will be removed from the Husbandry identifier grid.
- This feature will greatly improve efficiency and save time for both registrars and studbook keepers in the future since they will no longer need to communicate new studbook IDs or manually add them into the animal records.

Batch add animals to studbook: Users can now choose to "batch add" up to 50 animals to the studbook at one time from any draft animal screen (from Suggested List or manually added). Users have the option to define local ID and sex type for the batch animals and all other records from the draft animal will automatically populate for the batch added animals. There is also an option within the batch screen to add or remove animals from the batch if they added the incorrect number from the entry screen. For example, if I chose to batch add 5 animals but after entering the data realized I actually needed to add 6 animals, can add an animal to the list instead of canceling and starting over.
- This is the highest voted for feature in our Suggest Feature tool at this time (that has not already been built) so we are looking forward to the feedback from users on this new feature.

Navigation highlighting: Left hand navigation on the dashboard and animal lists (with and without overlay) now highlight to display which list the studbook is currently displaying. We had received feedback from users about having

difficulties navigating and visually understanding which lists they are working in; this new feature should help with navigation.

Changes to PMx export: Completed a change in how the PMx export is run within the system.

- Now, once users select to run the PMx export they will receive a notification that their export has successfully run. After they receive this notification they can choose to run additional PMx exports or close the PMx screen and continue to work in their studbook. The export will be run behind the scenes and once it is complete the user will receive a notification and the export will automatically download to their browser (as it does now).
- This change allows users to continue to work in their studbook while waiting for the export to complete.
- If the user closes the module or logs out of ZIMS prior to the export completing, then the next time the user opens that studbook the export (or exports) will automatically download. Note: The database will save the exports of one week – if the user does not log in within that time, they will need to re-run the export).

Displaying Linked Identifiers in Animal Basic Info Screen: Users can now see which linking criteria identifiers were used to link the studbook and Husbandry animal. A pop-up of the link criteria identifiers (local ID/mnemonic, transponder, SB ID) displays when the user hovers over the GAN in the basic information screen.

Hyperlink GAN in Animal Detail Screen: The GAN in the studbook animal detail screen is now a hyperlink to the animal detail in the Husbandry animal module if the user has been granted access to this module by their institution. If the user does not have access to the animal module, then the GAN will not display as a hyperlink. This was a highly requested feature by users, so they can view notes, weights, lengths, and other information in the Husbandry record quickly.

Non-ZIMS parents pending updates: Non-ZIMS parents that cannot be linked to an animal in the studbook no longer display as a pending update during migration or after migration.

- Historically when an animal's parents are entered in Husbandry as non-ZIMS animals and ZIMS cannot match them to an animal in the studbook, a pending update was created but the user could only reject the pending update.
- Now, there will be no pending update created, but the user will still be able to view the non-ZIMS parent record in the Husbandry view. This should significantly improve the experience for users as they will no longer have to reject these records. See example below.

Compare tool improvements: Implemented the ability for users to compare Husbandry animals in the Animal Compare tool as well as Studbook animals.

- In addition, feedback indicated that it is easy to confuse if users were viewing Husbandry or Studbook animals since there is no visual differentiation. Small changes were made to visually display the two types of animals differently within the tool to make it more useful when comparing animals to determine links or duplicates.

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.
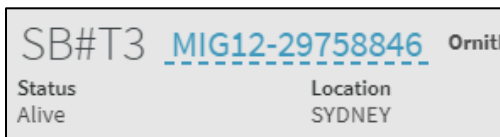**www.Species360.org** – **Global Information Serving Conservation**

- o Froze the header bar so users can always see it GAN/SB ID selected.
- o Added "Studbook Animal" and "Suggested Animal" text to the frozen header bar.
- o Studbook animals are now light blue and Husbandry animals are dark blue in color.

Institutional Holdings Location filter: Location filter is now available in institutional holdings report. It is the same location filter that is available in animal lists.

PMx Export improvements for in situ animals*:* A checkbox has been added that allows users to include in situ animals into their PMx analysis. When the box is left unchecked, the in situ animals will be treated as LTF and not included in the managed population. If the box is checked, the in situ animals will be included in the analytics and managed population (if they meet other filter criteria).

Taxonomy Filter in Animal Lists: A taxonomy filter has been added to the animal list screens (living, all, data quality, pending updates). All taxon within the studbook are listed in the dropdown and users can select one or more taxon for the filter parameters.

Overlay Export: This new feature is available in the overlay management screen, there are now options to export the overlay in excel or PDF format. The export displays HYP animals and studbook animals that have been edited in the overlay. The master record (what the record is in the master studbook prior to edit) and the overlay record are both displayed in the export.

Improvements to accepting Husbandry local institutions*:*

- Users can no longer accept local institutions defined by Husbandry institutions. When a studbook user accepts a transaction into the studbook that has a location/owner that is a local Husbandry institution the system will open the transaction but the local Husbandry institution will not be accepted.
  - o A warning message will appear to let the user know that the user must either enter a recognized global institution or use/create a local studbook institution.
- When a studbook is created from ZIMS data, any local Husbandry institutions will be added as local studbook institutions.
  - o To differentiate these local institutions, in the case that multiple Husbandry institutions are using the same name for different local institution the local studbook institutions are created with the mnemonic of the reporting institution attached to the local institution name.
  - o Users can edit the name of the local institutions in the institution list and they will change in the transaction field in the animal records.

Taxonomy filter for PMx export: A taxonomy filter (can select one or more taxonomy) has been added to the PMx export screen for demographics, genetics, and census export. The export uses the most recent taxonomy assigned to the animal to determine the selections in the export.

Select multiple taxonomy in census report filter: Users can now select multiple taxonomies when running the census report & graph.

Filter Animal List by Multiple Status types: Users can now select more than one status type when filtering their lists. This will assist studbook keepers who manage populations both in situ and ex situ, they can now filter to see all of their living animals within one list.

- By default, the "living" list still only displays animals within an alive status and not released to wild, but users can add the released to wild or LTF status to view these animals and then export the lists.

Format Change to Show History Export*:* Based on user feedback we have made some minor changes to the excel export when the "show history" filter is selected. The transactions have been moved to the end of the exported columns to make it easier to view/sort the export.

Filters displayed in PDF and Excel exports: The filters selected in animal lists now display in the excel and PDF exports in the headings. This will allow users who have created multiple exports to easily differentiate reports.

Institution studbooks: Functionality is now in place that allows our member institutions to migrate and create studbooks for species they manage.

Tool to move studbooks between regional associations: An internal tool that quickly allows Species360 to move a studbook between regions. After request and confirmation by both regional associations, Species360 support can move the studbook to the new regional association.

Performance improvements to animal detail screens: Added indexes to improve the load time for the animal detail screen when navigating and making edits.

Add end date for obsolete user: When a person that was assigned to a studbook was then marked as obsolete at their institution (when they leave the institution), the regional association was previously unable to add an end date for their role within the studbook. The only option was to leave them assigned or delete them. Now, the regional admin can edit the obsolete user and provide an end date so the studbook retains the information on who was previously assigned to the studbook.

Data entry monitoring: Non-Species360 members previously did not have access to the data entry monitoring tool. Changes were made that now allow non-members to see DEM for their studbooks when given access by their regional association.

Visualization of column sort: An arrow has been added to indicate which column of the animals list is currently sorted. The arrow is pointed up if the column is sorted in ascending order and down if the column is sorted in descending order. Each animal list can be sorted by a different column and the system will save the filters when the user navigates away. This visualization is meant to help users visually see how their list is sorted when navigating between multiple screens.

Data export (XML format) export available in the Tools Bar: The ability to download the full studbook data in XML format in the studbook Tools bar so any studbook keeper or regional association has access to the studbook data. This feature will be under role control, meaning regional associations can control who has access to this tool.

Global Studbook Search Tool: A new global resource tool is now available allows users to view and filter the studbooks currently managed in ZIMS and basic information regarding the studbook (scope, number of living animals, studbook keeper, current holders etc.).

- The tool allows users to view the all studbooks that are currently managed in ZIMS and apply a variety of filters to the list to filter down the types of studbooks displayed. Multiple filters can be applied at a time to narrow down the results. Filters include:
  - Taxonomy: Filter the list by taxonomy.
  - Taxonomy held by: Enter an institution in this filter to view a list of studbooks that are also currently held by the institution.
  - Scope: The regional association or institution managing the studbooks.
  - IUCN status: Filter by a specific IUCN status
  - User title: Filter by the studbook title assigned to users.
  - User assigned: this can be applied by name or institution
    - Name will allow user to search any user and view the studbooks they currently are assigned to

- ▪ Institution allows the user to search for any users assigned at the institution entered. For example, if you searched your institution you would see a list of all studbooks that have someone at your institution assigned to the studbook.
- The tool opens to graph views of the global studbook breakdown by taxonomy, scope, user title, and IUCN status.
  - o Selecting the sections of the graph will take you to the list of studbooks.
- Users can also select the studbook name to open a pop-up window that outlines the taxonomy managed and the users assigned to the studbook.
- This tool replaces the Studbook Keeper List and Studbook Chart tools.

Add Note to Data Quality Error: Added the ability for users to add a note to a data quality error within the Data Quality list. Users are able to add notes to active or dismissed data quality errors. Notes added to a data quality error will automatically display in the animal notes grid in the animal detail screen. Once the error is resolved, the error will be removed from the list but the note remains in the animal note grid in the animal detail screen.
- This new feature would allow users to easily record why they dismissed an error or document investigation they have completed on an active error.

In situ animals display in living list: Animals that are living regardless of if they have come into captivity or not now display on the living animal list. If the user wants to view only animals held in captivity they can apply a location filter to the living list.

Delete local institution: Currently, there is not an option for deleting a local institution that has been added to the studbook. If the local institution is no longer used within the studbook, users will be able to delete the local institution from the institution list.

Prevent duplicate UDFs: A validation was implemented when adding UDFs to prevent users from adding UDFs that have the same name within their studbook. This was a small fix, but should have a big impact since historically if the user created two UDFs with the same name broke the animal lists within the studbook.

Added local ID options for recapture/release to wild transactions: Adding a location for the user to enter a local ID to these transactions, previously was not available. Requested by users for in situ tracking.

Census Report improvements: Small improvements based on feedback from the census report changes made earlier this year. These will include:
- ***Birth type broken into total (male.female.undetermined):*** currently only the total number of animals shows in the birth type column, to be consistent with the other columns we will break the total down by sex.
- ***Selecting the graph navigates to list of animals:*** Users will be able to select a year in the graph to quickly see the list of animals that the graph is counting. This is a similar function that is available in the raw data census report but will add it to the graph so users no longer have to navigate between the raw data and the graph.
- ***Lock year column by default:*** The year column now is defaulted to stay locked in places when the user scrolls through the report. User can also lock additional columns in the report

Notification that a studbook animal is already linked in Suggested List: A "!" notification was added next to SB IDs in the Suggested List and Suggested Animal Detail screen for studbook animals that are already linked to GANS.
  - o Hover over the "!" and it identifies which GAN the studbook ID is currently linked to.

Archive/Unarchive a studbook: Regional associations/institution can now archive a studbook that is no longer in use, if the studbook is managed in the future the region/institution can unarchive the studbook. Archived studbooks do not display in the Global Studbook Search Tool.

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