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ZIMS for Studbooks 2021 Released Functionality

Below is a list of feature enhancements and new functionality that has been released in ZIMS for Studbooks throughout 2021.

Contact Species360 Support

Age Structure Tool:

The Age Structure tool is now available in the tools menu. The Age Structure tool graphs the ages of all currently living animals for male, female, and undetermined sexes. Within the tool you can:

- Hover over the age group bar to see a total count and breakdown of sex types.
- Click the age group to view a list of the animals within that age group (similar to the census report tool).
- Use the 'include animals with undetermined birth dates' checkbox to include or exclude animals with undetermined age estimates by default animals with undetermined age estimates are excluded.
- Filter the graph by location, UDF and taxonomy.
- Use the 'show breeding' checkbox to view which animals in the structure have or have not produced offspring.
- Click and drag to zoom in to a specific section of the structure.
- Export the graph to JPEG, PNG and PDF.



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This is a new tool and is under role control. If you do not have access, contact your regional association or institutional studbook administrator.

Find out more about the Age Structure tool here: ZIMS Help document - Studbook Tools Video - Age Structure

Undetermined birth date estimates for hypothetical animals:

All hypothetical animals (HYPs) created in an overlay in your studbook now have an undetermined birth date by default.

Overlay 1 > Living Animals > SB#Hypoth	netical			
SB#Hypothetical				
This is a hypothetical animal, it will only overlay is applied	display in your studbook	lay in your studbook when your		📀 Sex
overlay is applied.			Parents	Rearing
			Taxonomy	
Global Status: Animal is not current	ly at a ZIMS institution	n - animal is not i	receiving updates.	
Transactions				
				€ ⊕ - & -
Event Type	Date	Location	Local ID	Owner
Birth/Hatch (Undetermined)	Undetermined 🕜	Undetermined		

Find out more about overlays and hypothetical animals here: ZIMS Help document - Studbook Overlays

Export Global Studbook Search list:

Users can now export the full or filtered studbook list in the Global Search Tool to PDF and Excel.



Find out more about the Global Studbook Search list here: ZIMS Help document - Global Studbook Search Tool Video - Global Studbook Search Tool

Add ZIMS institution column to Institutional Holdings report:

A column has been added to the Institution Holdings report which indicates if the institution is currently using ZIMS for record management. This new feature assists users in identifying which institutions are not entering data in ZIMS and need to be contacted for updated taxon reports. From the Institution Holdings report, users can quickly navigate to the list of animals held by that institution using the Current Holdings and Historic Holdings columns.

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	Living An	imals > Institut	ional Holdings				
AVAILABLE	Total: 356 Institutions	Report Scope	: O Current Holdings 💿	Historic Holdings		Filter Institutions	Q 🖻 🖄 🕯
Dashboard	Filter: No Filters Applied						
	In stitution Nome						
My Animals	Institution Name	Mnemonic	Country	Association	ZIMS Institution	Current Holdings	Historic Holdings
My Animals	Institution Name	Mnemonic	Country	Association	ZIMS Institution	Current Holdings	Historic Holdings 4 (4.0.0)
My Animals 430 Living		Mnemonic	Country	Association	ZIMS Institution	Current Holdings 3 (3.0.0) 0 (0.0.0)	Historic Holdings 4 (4.0.0) 4 (3.1.0)

User defined field and taxonomy filters added to Institutional Holdings:

Users can now filter the Institution Holdings report by UDF and taxonomy in addition to the institution filter.

Total: 356 Institutions Report Scope:	O Current O Historic Holdings Holdings	Filter Institutions	Q 🗷 🖾 🎜
Filter: No Filters Applied			
Institution Taxonomy UDF			
Saved Institution 👻 🖨 😮			
nstitution/Continent/Country/Association:			
Q			

Find out more about the Institutional Holdings report here: ZIMS Help document - Institutional Holdings Video - Institutional Holdings Report

Select multiple sex types in the Animal List filters:

Users can now choose more than one sex type when filtering the animal lists.

Select filter 👻	• 🖹 🕄									
General Date Inst	titution UDF Note		_							
Status (Select one or mor	e) Taxon	omy (Select one or	more)	Sex Type (Select one or more)			Breed	ing	Transaction	
Alive ≭	*		-	Female * Female Pseudoh	ermaphrodite ×		-		-	*
Birth Type	Rearing	Parent		Female						
-		-	-	Female Pseudohermaphrodite						
Studbook ID: All 	O Numerical O Not Num	nerical		Indeterminate						
				Male						
				Male Pseudohermaphrodite						🚯 Reset 🖸
Studbook ID	Current Location	Sex Type	Current Sta.	True Hermaphrodite	Current Lo	Sire	Dam	Age ↓	Taxonomy	Last Modified
				Undetermined						

Find out more about filters and animal lists here: ZIMS Help document - Filters and Favorites Video - How to Find an Animal

Video - All and Living Lists

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Ability to add, edit and delete regional and international studbook IDs in Identifier grid:

Users are able to add/edit/delete regional association/international studbook IDs that are unrelated to the studbook. Users cannot edit the permanent or temporary studbook ID for the animal. The permanent ID displays in the grid in italics.

In the example below, an EAZA studbook animal is given the permanent studbook ID of 4633, which appears in italics. The studbook user has also added a regional studbook ID of 1234 in a ZAA studbook, which can be edited or deleted and does not affect any other studbooks.



Export full user list for regional associations/institutions:

Regional association administrators can now export a full user list for all the studbooks within their region, or a filtered list of studbooks.

∰ Iı	istitu	tion Search								Help Menu	- 0 - X
Glob	al Ins	stitutions	P Your L	ocal Institutions	P	Add New	😡 My In	stitution		_	_
»	Ins	titution Statistics	My Institution								
	Det	tails Studbook									
	Stu	udbook List									Î
	⊿	<i>ଥ 🛅 </i> Sh	now search form								Actions -
		Studbook Name	Taxa Included	Description		Stu Kee	dbook per	Last Edited	Currentness	Assigned People	Export Full User List

Regional Association allows studbook user to assign person to studbook:

Previously, only the Regional Association would be able to assign access to a studbook. With this new feature, regional associations can grant studbook users the ability to assign specific roles to other users. This feature frees up regional time when it comes to role management and allows studbook keepers control over who can access the data.

• The regional association admin determines which roles within their region can be assigned by users within the studbook module in the Studbook Roles box.

St:	idbook Roles 🔮		0	Actions -
	Role	User Count	Role Can Be Assigned by User in SB Module	
	All View and Edit Access	6	×	
	Population Biology Advisor	26	×	
	Studbook Keeper	295	×	
	View and Export Only Access	31	×	
	4 4 Page 1 of 1 ▶	🕅 🎅 Page :	Size 500 Change	1 - 4 of 4

• Within role control, the regional admin can determine which roles should be able to make assignments with the studbook. The studbook assignments functionality determines

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access to this tool, admins can assign search/view (view the studbook assignments), add, edit, delete actions.

Functionality			Actions	
Studbook Dashboard	Search/View	Add	Edit	Remove
Studbook Information	Search/View	Add	🗹 Edit	Remove
Studbook Image	Search/View	🗸 Add	Edit	Remove
Studbook Assignments	Search/View	Add	🗌 Edit	Remove

• Once role access has been assigned, the users with access to the functionality are able to act within the studbook Overview screen within the Studbook Assignments grid.

Add New Studboo	ok Assignment	×
Global/Regional Association	n Association of Zoos & Aquariums (AZA) / AZA	
Studbook Name	[NOT MANAGED] Bobcat (Lynx rufus)	
Institution*		₹ Q
Person*	Please select institution first	Ţ
Studbook Role*		Ψ.
Studbook Title*		Ŧ
Assignment Start Date*		Ê
Assignment End Date		Ê
🗙 Delete		Save & Close

Find out more about the studbook admin role and regional association management here: <u>ZIMS Help document - Studbook Admin</u> <u>PowerPoint - Regional Association Management</u>

Apply Demographic Filters to all Filters button in PMx export:

The Apply Demographic Filters to all Filters button in the PMx export has moved to into the demographic selection box and has been reformatted to make it more user friendly.

xport to PMx 🛛 🥺		Feedback Requested				2
						2
Demographic Fil	ter					
Demographic Filter Institution Filter Start Date Institution Filter Jan 01, 1900 Saved Institution ~ C C UDF Filter Add filter UDF Value Institution/Country/Association: No UDF filter provided. No UDF filter provided. Institutions						
Jan 01, 1900	Saved Institution 🔻 🔅 🖹 ?	ODF Filter				 Add filler
ind Date	Institution/Continent/Country/Association:		UDF		Value	
Aug 09, 2021	Q	No UDF filte	r provided.			
	Exclude Institutions					
	Excluded Institutions					
'axonomy (Select one or i	nore):			_		
	-			T 4		

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Export one PMx/XML export at a time:

To improve processing speed, users are now only able to export one PMx and one XML export at a time, per studbook. Once the export has completed and downloaded, another export can be run. If a user has multiple studbooks, each studbook can have a PMx/XML export running at the same time.

Notification that PMx/XML export is running:

The system provides a notification while the PMx/XML exports are running. When you select to run a PMx or XML export you see a green notification in the top left corner of your screen (see screenshot example below). It tells you what number your export is in the queue. Any exports that were run before yours must complete prior to yours processing, this rule has not changed but with the notification you now have visualization of where your report is and when it starts processing.



Find out more about exporting to PMx here: ZIMS Help document - Directions on exporting to PMx Video - Exporting to PMx

Bulk accept/reject taxonomy pending updates:

Users can now accept or reject all pending taxonomy updates for all animals within the studbook. This feature is especially helpful for users with many pending taxonomy updates due to migration or a taxon change in ZIMS.

Taxonomy								
		🗌 Нуы	id 🕄 🔂 📤 🔻 🕨	Inst F	Records COULANGE MU	LHOUSE		
Taxonomy	Taxonomy Determina	Date	Reported By	-	Тахопоту	Taxonomy D	etermi	Date
				0	Aonyx cinerea / OBS	Parental Taxo	onomy	May 3
A	the determined	May 21, 2015	Data Minatian Datata	+	Accept Update		ixonom	Mar 2
Aonyx cinereus / Asian	Undetermined	May 31, 2015	Data Migration Process	+	Accept with Edit			Jun 1
Cov			1	¥.	Accept All A. cinerea Updat	es in Studbool		
Sex				0	Reject Update			
Rearing				1	Reject All A. cinerea Update	s in Studbook		

Find out more about accepting or rejecting all pending taxonomy updates here: ZIMS Help document - Accept/Reject All Pending Taxonomy Updates

Improvements to how the system calculates data quality errors:

Data quality checks were previously run when a user hit save after a record was changed. However, for some studbooks with unconventional or complex data, the data quality checks significantly slowed the saving of records.

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Data quality checks have now been removed from the saving process, allowing users to save animal records quickly and continue to work on their studbook while data quality checks continue to run in the background.

Users can view those animals with data quality checks calculating within the Data Quality list. Only animals impacted by the edited transactions will show as calculating. Users can continue to work on the animals and make edits while the calculations are processing.

Total Errors: ? (? (High).? (Med	ium).? (Low)) in ? (?.?.?) anima	ls	Search Animal	by identifier	Q	+ Add New I	Inimal to Studbo	* 60 0	1
Filter: No Filters Ap	plied										
High (7) Medium	(1) Low(1)	Display Dismissed Error				1	Calculation	io progress. List	will refresh whe	n calculation is	0.04
Studbook ID †	GAN	Current Location	Current	Sex Type	Birth Date	Current	Sire	Dam	Age	Birth Type	-
824		BATONROUG	M0969	Female	Nov 11, 1	Dead	MULT100	MULT56	2%8M,5D	Captive B	
	EM-19 Interbirth	interval is less than gesta	tion period O	ж							
125	17500881	BUSCH TAM	16399	Female	Nov 18, 1	Dead	MU(T)00	MULT56	1406M,290	Captive 8	
	O Calculating										
829	17500882	BUSCH TAM	16405	Female	Nov 28, 1	Dead	MULT100	MULT56	17(29(26)	Captive B	
	O Calculating										
802	12000	FERNDALE		Female	Dec 18, 1	Undeter	MULT100	MULT56	11,84,120	Captive 8	
	EM-29 Interbirth	interval is less than gesta	tion period O	l se							
636	17560883	BUSCH TAM	\$6474	Temale	Feb-09, 1	Deiad	MUSTIOI	MULTS?	12%1M,#D	Captive B	
	Calculating										

Find out more about accepting or rejecting all pending taxonomy updates here: <u>ZIMS Help document - Accept/Reject All Pending Taxonomy Updates</u>

Rule changes around reusing a previously delete studbook ID:

Historically, if users deleted or made a mistake when assigning a studbook ID for an animal in the studbook, they could not reuse the studbook ID for another animal in the future. This rule has been removed and users can now reuse studbook IDs that were previously deleted. As long as the studbook ID is not currently active as a studbook ID, the user is able to assign it to another animal. **Example scenario:**

User assigns studbook ID 123 to DRAFT#54. After the ID is assigned, the user realizes they meant to assign ID 123 to DRAFT#55. The user is able to undo the assignment of ID 123 to DRAFT#54 in data entry monitoring, and re-assign studbook ID 123 to DRAFT#55.

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