

## 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.

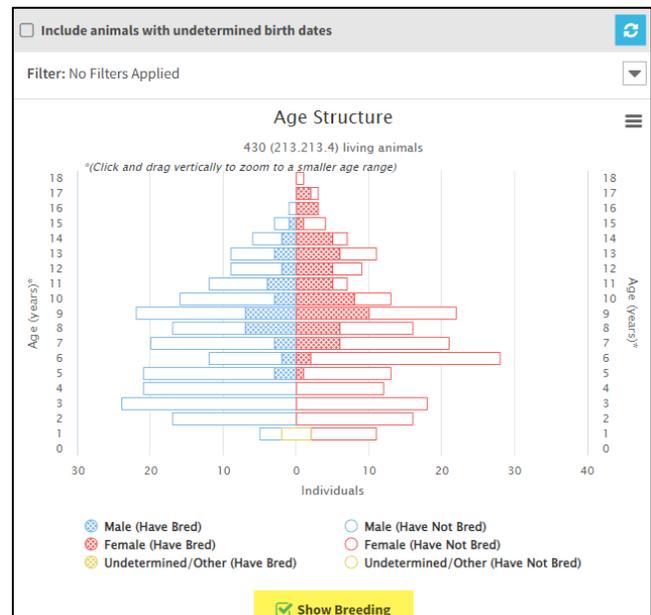
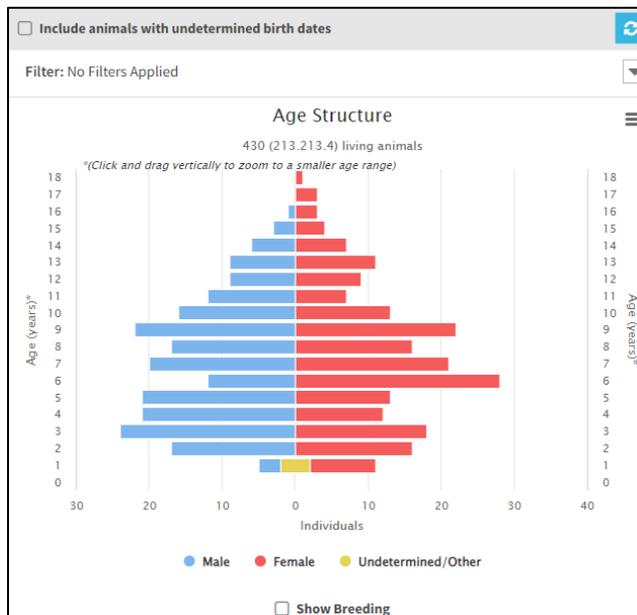
[Contact Species360 Support](#)

### 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.

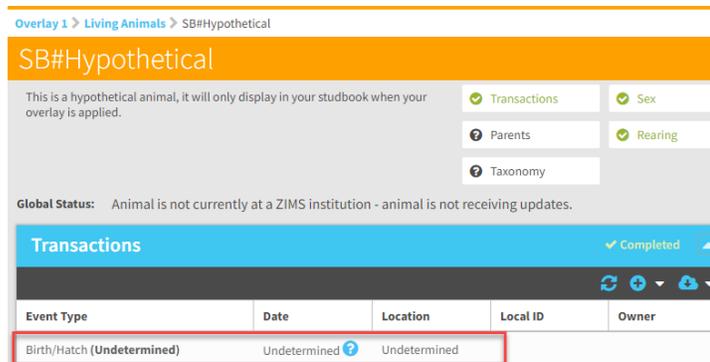
Find out more about the Age Structure tool here:

[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.



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:**

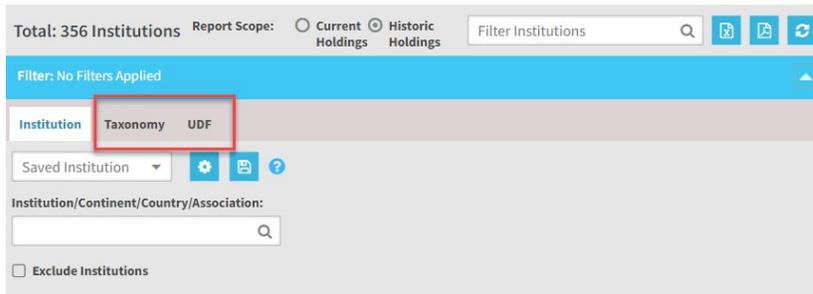
A column has been added to the Institution Holdings report which indicates if the institution is currently using ZIMS for record management. This new feature assists users in identifying which institutions are not entering data in ZIMS and need to be contacted for updated taxon reports. From the Institution 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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Institution Name	Mnemonic	Country	Association	ZIMS Institution	Current Holdings	Historic Holdings
				✓	3 (3.0.0)	4 (4.0.0)
				✓	0 (0.0.0)	4 (3.1.0)
				✗	0 (0.0.0)	2 (1.1.0)

**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.



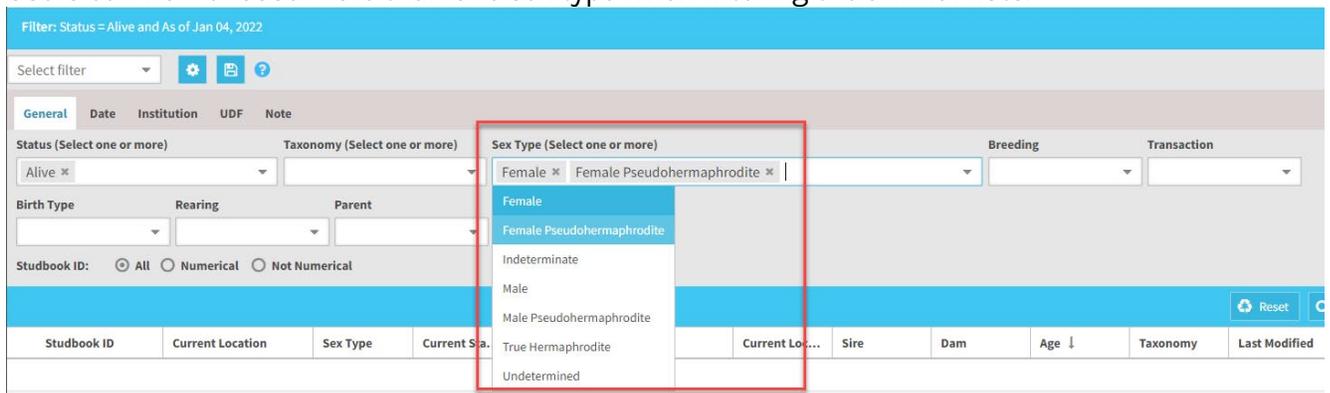
Find out more about the Institutional Holdings report here:

[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.



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:**

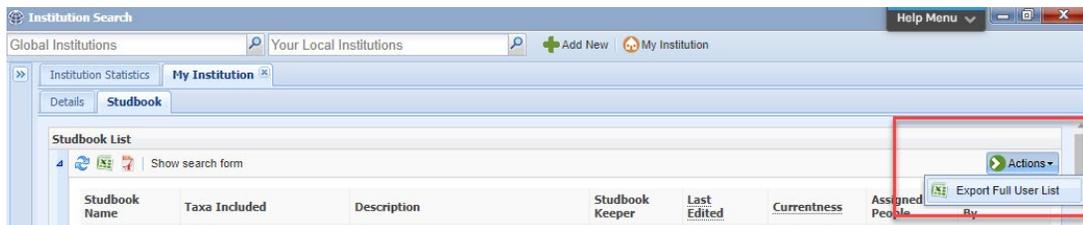
Users are able to add/edit/delete regional association/international studbook IDs that are unrelated to the studbook. Users cannot edit the permanent or temporary studbook ID for the animal. The permanent ID displays in the grid in italics.

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.

Type	Identifier	Location/descriptor	Status	Effective Date	Institution	Reported By
Regional Studbook ...	1234		Active	Jan 04, 2022	ZAA	Species360 Member Support
Regional Studbook ...	<i>4633</i>		Active	Jan 04, 2022	EAZA	Species360 Member Support

**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.



**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.

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	✗

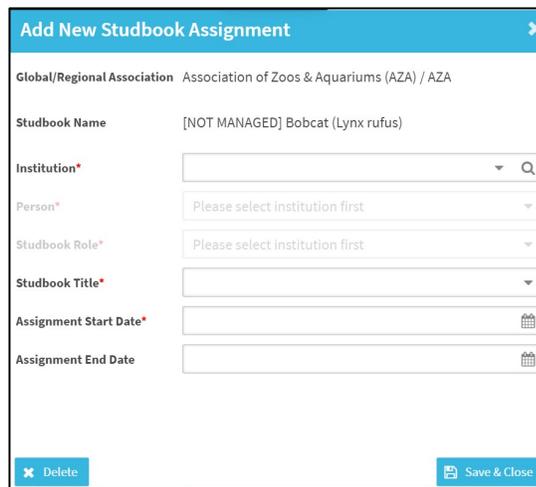
- Within role control, the regional admin can determine which roles should be able to make assignments with the studbook. The studbook assignments functionality determines

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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	<input checked="" type="checkbox"/> Search/View	Add		Edit	Remove
Studbook Information	<input checked="" type="checkbox"/> Search/View	Add		<input checked="" type="checkbox"/> Edit	Remove
Studbook Image	<input checked="" type="checkbox"/> Search/View	<input checked="" type="checkbox"/> Add		Edit	<input checked="" type="checkbox"/> Remove
Studbook Assignments	<input checked="" type="checkbox"/> Search/View	<input type="checkbox"/> Add		<input type="checkbox"/> Edit	<input type="checkbox"/> Remove

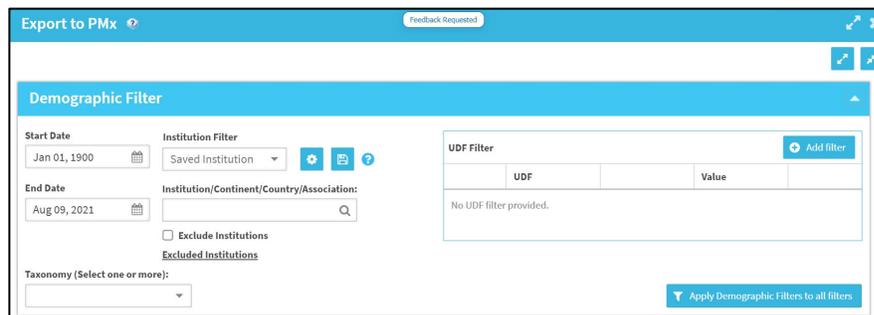
- Once role access has been assigned, the users with access to the functionality are able to act within the studbook Overview screen within the Studbook Assignments grid.



Find out more about the studbook admin role and regional association management here:  
[ZIMS Help document - Studbook Admin](#)  
[PowerPoint - Regional Association Management](#)

**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.



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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							
Studbook Data				Inst Records			
Taxonomy	Taxonomy Determina...	Date	Reported By	Taxonomy	Taxonomy Determi...	Date	
				Aonyx cinerea / OBS...	Parental Taxonomy	May 3	
Aonyx cinereus / Asian ...	Undetermined	May 31, 2015	Data Migration Process	+	Accept Update	taxonom...	Mar 2
				+	Accept with Edit		Jun 1
				+	Accept All <i>A. cinerea</i> Updates in Studbook		
				-	Reject Update		
				!	Reject All <i>A. cinerea</i> Updates in Studbook		
Sex							
Rearing							

Find out more about accepting or rejecting all pending taxonomy updates here:

[ZIMS Help document - Accept/Reject All Pending Taxonomy Updates](#)

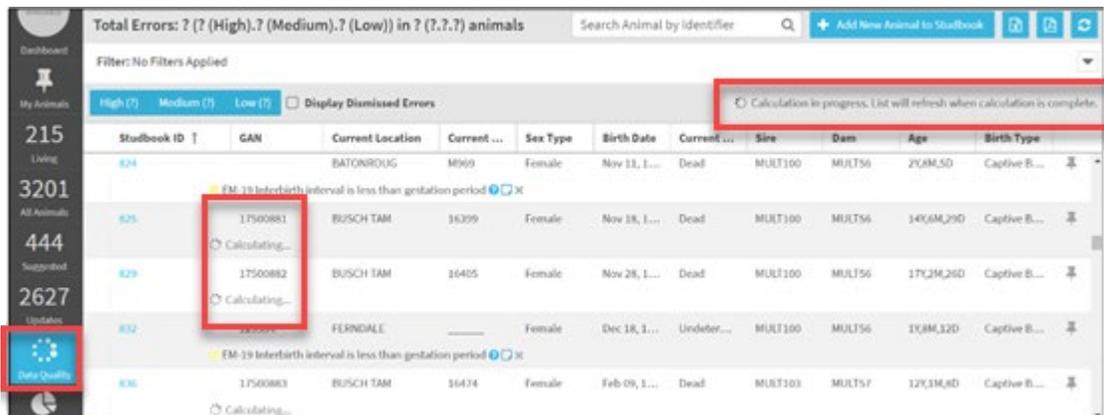
### Improvements to how the system calculates data quality errors:

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.



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

**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.

**Revised 4 January 2022**