

## ZIMS Institution Studbook functionality overview

### [Contact Species360 Support](#)

Species360 offers institutions the ability to manage their institution's studbooks in ZIMS for Studbooks. Users can or create a new studbook populated from ZIMS data for a specific species or migrate an existing studbook from SPARKS or PopLink (for a fee). Additional information on institutional Studbooks [here](#).

Institution studbooks are available to ZIMS members (free of cost) and to non-members (at a yearly fee).

All institutional studbooks are managed in the Institution Module within the Studbooks tab. Each institution with studbooks requires a Studbook Administrator. The Studbook Administrator may be the ZIMS local administrator or another user at the institution.

- The management of institution studbooks will require some added work for the Studbook administrator, as they will need to create the roles, make assignments, and manage access to the studbooks in ZIMS for their studbooks.

There is a tool in ZIMS that allows Species360 to move studbooks between regional associations/institutions as needed.

---

### Who "owns" institutional studbooks?

- Species360 defines the institution managing the studbook as the owner and all studbook access or data requests will need to be approved by the owning institution. However, data sharing or research using a studbooks data must be approved by all data owners, and they should all be cited appropriately. This is the current structure for association studbooks and for general husbandry data (with almost identical data sharing constraints), and we will all want to encourage similar diligence for institution studbooks.

---

### Process for creating or migrating an institution studbook:

- If a Species360 member or non-member would like to migrate or create a studbook in ZIMS, they would contact our support team at [support@species360.org](mailto:support@species360.org).
- They need to identify the following:
  - Will they migrate an existing studbook in PopLink or SPARKS format or create a new studbook from ZIMS for Husbandry data?
    - A migration would create the studbook for the institution with all the data from the legacy database. The studbook animals would be automatically linked to any Husbandry animals that matched studbook animals upon migration. Any animals not in the studbook that match the studbook taxonomy would display in the Suggested List for the Studbook Keeper to add.
    - A creation of a new studbook would create a studbook database from ZIMS for Husbandry data for the selected taxonomy with the animals that have been held or owned by the institution creating the studbook and only have been at one institution. All animals that have been held by more than one institution or are not at the institution creating the studbook and match the studbook taxonomy will be on the Suggested List for the Studbook Keeper to add to the studbook.

- Determine the taxonomy that should be included during migration
    - If a studbook already exists for the requested species within a region or as a global studbook the process outlined in the following section would be followed prior to creation.
  - A Studbook Administrator will need to be identified if there is not already one assigned.
    - The Studbook Administrator may be the ZIMS local administrator or another user at the institution.
    - The Studbook administrator will create roles, make assignments, and manage access to the studbooks in ZIMS for their institution's studbooks.
  - Additional information on institutional studbooks [here](#).
- 

#### Costs associated with creating or migrating an institution studbook:

- **Species360 members:**
    - Creating new studbooks from ZIMS data: this feature is free for ZIMS members
    - Migration of member institution studbook from PopLink/SPARKS:
      - Migration is free for members until 31 December 2021
      - A one-time migration fee of \$300 USD will be charged for migrations after 31 December 2021
    - Migration of member institution studbook from format other than PopLink/SPARKS:
      - Species360 is only supporting migration of studbooks from PopLink or SPARKS format at this time.
      - If you are interested in migrating your studbook that is in a format other than PopLink or SPARKS, please contact [support@species360.org](mailto:support@species360.org).
  - **Non-Species360 Members:**
    - For non-Species360 members migrating an institution studbook, there is a one-time migration fee of \$300 USD for of a SPARKS or PopLink studbook.
    - Creation of a new non-member institutional studbook in ZIMS is free of cost.
    - To maintain the studbook in ZIMS, there is a yearly fee of \$1000 USD for each studbook maintained by the non-Species360 member.
      - This fee provides access to a dedicated Species360 support representative and access to the library of Studbook training materials. The fee also supports the ongoing development of ZIMS for Studbooks.
    - The non-member hosting institution must sign a user agreement with Species360 prior to accessing the studbook data in ZIMS.
- 

#### If an institution requests to create studbook for a species that already exists in ZIMS, what is the process for creation?

- ZIMS allows one studbook per species at a regional association level; systematically ZIMS does not prevent multiple institutions within the same region from creating a studbook.

- However, when Species360 receives a request for a new studbook (institutional or regional) we check to see if a studbook for that taxon already exists within the system.
  - If a studbook exists that could be used by the requesting institution, we place them in contact with the owner of the studbook to discuss access options. This will prevent duplication of data in the system and increase collaboration across regions and institution.
    - If the institution decides that the existing studbook does not meet their needs or the owner of the studbook will not provide access, then Species360 will internally decide how to move forward with creating the studbook to meet the member's needs.
  - If the studbook does not exist for the requested taxon, then Species360 will create the member institution studbook.

---

### **Studbook databases for the same species can be managed in ZIMS for Studbooks because:**

- Species360's mission is to support the collaboration of association and institutional members, working to conserve species. We have to be careful not to insert ourselves into process, rules, and procedures between associations and their members.
- If one of our members requires a studbook that already exists in ZIMS to improve management within their collection, we are going to do our best to support their needs. We also encourage you to work with your regional association closely if you are requesting a studbook that already exists in your region.
- ZIMS provides a Global Studbook Search tool that allows all users to see the studbooks that exist in ZIMS. This provides transparency to what studbooks are being managed across all associations and institutions. Regional associations can use this list to communicate with member institutions or other regional associations in order to collaborate on studbooks as only the regions will know the details behind your plans and your intent to communicate and manage competing priorities and relationships with your members.

---

### **Institution studbook access:**

- **Access to the institution studbook data:**
  - Institutional Studbook Administrators can provide studbook access to any ZIMS user. Role control allows the administrator to provide a variety of access rights or restrict access to specific tools.
  - If a person at a non-ZIMS institution would like access to a member studbook, the Studbook Administrator and non-member can contact Species360 support to have a log-in created for the non-member user. Once the log-in information is created, they can be assigned to a studbook. These users will only be able to see the studbook they are assigned and no other ZIMS functionality. They must comply with all Terms and Conditions published for the use of ZIMS.
- **Access to basic information about institution studbooks:**
  - The Global Studbook Search Tool is a global resource tool that displays basic information on all the studbooks managed within ZIMS. Users can quickly view all the institutional studbooks within ZIMS, who manages them, what taxonomy are managed within the studbook and the number of living animals in the studbook.

**What if an existing regional association studbook is no longer recommended for collaborative management through a TAG decision or not meeting current Animal Program criteria?**

- If a regional studbook is no longer managed, the regional association has the following options in ZIMS:
  - Archive the studbook
    - This functionality allows the regional association to archive the studbook so it no longer displays on their active studbook list but the studbook remains in the system. The region can filter for archived studbooks and access the data within the studbooks. Archived studbooks will not display in the Global Studbook Search tools.
  - Collaborate with an institution to move the studbook.
    - An institution can agree to become the new owner of the studbook and Species360 will move the studbook to that institution once both the regional association and the institution agree. Once the studbook is moved the institution owns the studbook and if the region wants to move it back both the region and the institution must agree prior to Species360 making the move.
- If an institution reaches out to Species360 about managing a regional association's archived studbook, we will contact the regional association to initiate conversation between the regional association and the institution but we will not move the studbook without confirmation from both parties.

**What if an institution no longer wants to manage one of their institutional studbooks?**

- If an institution no longer wants to manage their institutional studbook they have the following options:
  - Archive the studbook
  - Transfer the studbook to another ZIMS member institution, non-member institution, or to a regional association

**What if an institution wants to transfer one of their studbooks to a different institution for management?**

- The institution holding the studbook and the new holding institution would contact our support team to provide documentation that they agree to the transfer, once Species360 has this confirmation we would move the studbook to the new holding institution.
  - Current holding institution must send email confirmation with the studbook name, new holding institution name, contact information, and date of transfer.
    - If the new holder is a non-member institution, the user agreement must be signed and fees paid prior to studbook access.
  - New holding institution must send confirmation of transfer, studbook name, and the date of transfer
  - Once Species360 has this information, the studbooks will be transferred

**What if a TAG recommends a species become a collaboratively managed program and the studbook is currently being managed as an institution studbook?**

- Once a studbook has moved from the regional association to an institution or vice versa, Species360 will consider them the new owner of the studbook. If both the region and the institution contact our support team and agree to move the studbook to or from the region/institution, then we will make the move. However, if the region/institution do not agree then we will not move the studbook and it will remain managed within the owning institution until an agreement has been met between the institution and regional association.
  - Current holding institution must send email confirmation with the studbook name, new regional association, contact information, and date of transfer.
  - Regional association must send confirmation of transfer, studbook name, and the date of transfer.
  - Once Species360 has this information, the studbooks will be transferred

---

#### **Institutional studbook accountability:**

- Species360 relies on the regional associations to track accountability for their regionally managed studbooks. There are tools in ZIMS to assist with this management.
- As part of our user agreement, the institution agrees to keep the data up to date (we have a similar agreement in place for our other modules in ZIMS).
- For institution studbooks, the Species360 support team assesses member studbooks on a bi-annual basis and reaches out to any institution's Studbook Administrator if there has been no data entry within the studbook over the past six months.
- If a studbook remains inactive for a year, our support team will alert the institution and start the process to archive the studbook.
- Species360 support staff is available to assist studbooks users with questions.
- Potential future functionality to improve member studbook accountability:
  - Add a column to the Global Studbook search to display the "last edited" date field. This would allow users looking at the studbooks to know when the studbook was last edited which is an indication of how updated the data is within the database.

---

Revised 7 September 2022