INDIVIDUAL TRANSACTIONS MADE EASY

Contact Species360 Support

As animals come and go you will be selecting from the various Accession and Disposition Modes and Terms in ZIMS. How to use most of these is very clear, while the correct use of others is sometimes not obvious. This document explains how to correctly record:

At the end are various scenarios that may help you determine what Mode, Term, Event, or Record Change you should record.

The word "animal" is used for either an individual animal or a group. The transaction "Mode" is the main action you are taking such as accessioning an animal "From Another Institution" or dispositioning an animal as "Missing". The transaction "Term" covers the details of the Mode such as "Donation From" for the From Another Institution example and "Escaped" for the Missing example.

The Terms include the Physical (where the animal is) and the Ownership (who owns the animal) information. These statuses are recorded in separate fields.

If you recorded a Transaction Term incorrectly it is easy to change by editing it in the My Transactions stream. You cannot change a Transaction Mode in My Transactions. It would need to be deleted and re-entered using the correct Mode.

ACCESSION TRANSACTION MODES

In this document, "Accession" is used for both the initial recording into the ZIMS database as well as creating "Visits" using My Transaction stream for animals that are already in the database because there is much overlap.

From Another Institution

This Term would be used if you received an animal from another facility. This facility could be another aquarium or zoo, a private breeder or even a donation from a member of the public. You should have some sort of documentation regarding the transaction.

Collected From Wild (in My Transactions called "From Wild")

This term should be used only if a member of your staff or someone designated by you removed an animal from the wild that went directly into your collection. An animal born in the wild but transferred to you by another is not Collected From Wild.

Rescued

This term is used when an injured or orphaned animal (often a native species), or one whose survival may be compromised in its current situation, is either collected by you and brought back to your facility or brought to you by someone else. The end result is usually release back to the wild or placement elsewhere but not always.

Appeared

This is not a planned transaction, the animal just showed up at your institution one day. It could have walked, flown or hopped into an enclosure on its own, or it may have been deposited at your facility. You do not have signed paperwork. If you do, it would be a From Another Institution transaction.

Birth/Hatch

The animal was born or hatched at your facility or at another institution but you have ownership of it. In an out on loan situation, usually the holding institution records the birth, but, as the owner you can initiate the transaction. And if it is a non-ZIMS institution, the ZIMS institution that is the owner will need to do so. If you want to record a hatch of an accessioned egg or the birth of an accessioned fetus you would select to Record Event and not a Birth/Hatch.

From Lay

An egg or eggs were laid. This Mode is only available if you have selected an entity of Egg, Group of Eggs or Egg Mass. If you take an egg from the wild that is Collected From Wild and not From Lay. If the egg hatches you will select to Record Event – Hatch Event for an Accessioned Egg, not a Birth/Hatch.

Fetus Identified

A fetus has been identified in a female by ultrasound, palpation or other means. If the fetus is born you would Record Event – Birth Event for an Accessioned Fetus, not a Birth/Hatch. IMPORTANT NOTE: If a marsupial joey is found in a pouch, regardless of how small it is, it is NOT a Fetus Identified. It is a Birth/Hatch.

Undetermined/Indeterminate

Hopefully, this Mode is only used for historical transactions where you have no idea what the terms were. It helps you from creating fiction by guessing the Mode. When this accession Mode is selected you need to check a radio button to select Undetermined or Indeterminate. What is checked will drive the Term, **Undetermined** or **Indeterminate,** you can select. Both are Physical and Ownership status. Undetermined should be selected if you don't know the Terms right now but you may. If you have selected Undetermined and discover the appropriate Term later on, this transaction will need to be deleted in the My Transaction stream and the correct Mode and Term entered. Indeterminate means that you will never know the correct Term. Indeterminate is Impossible to know.

Recaptured

You have recaptured an animal that was previously released to the wild. If the animal went missing and you got it back, you should use Retrieval of Missing. This Mode is only available in My Transactions because the animal needs to already be recorded in the database, so it is not available under the Start > Accession menu. A previous disposition of Release to Wild must be recorded.

Retrieval of Missing

You have retrieved an animal that was missing. If you released the animal to the wild you should use Recaptured. This Mode is only available in My Transactions because the animal needs to already be recorded in the database, so it is not available under the Start > Accession menu. A previous disposition of Missing must be recorded.

FROM ANOTHER INSTITUTION TRANSACTION TERMS

Once you have selected the appropriate Transaction Mode you then need to select the appropriate Transaction Term. As mentioned, these Terms contain information about the Physical (where the animal is) and Ownership (who owns the animal) status. Make sure you not only select the correct Term but the correct Physical/Ownership status.

Designated to My Institution

To correctly use this Term, the animal must already be recorded in ZIMS via a Birth/Hatch and held at another facility. At least one of the parents must be owned by you. This is the Term to use when your institution is determined to be the owner of a Birth/Hatch elsewhere after a survival period. The owning institution would record this Term. If the ownership was assigned to you when the Birth/Hatch was recorded, you do not need to use this Term. This is an Ownership Only transaction.

Donation From

You received the physical animal and/or legal title to it with no monetary payment or value given. If you received the animal in exchange for another animal or something of equal value, that is a Trade

From and not a Donation From. This transaction can be Physical and Ownership or Ownership Only. If it is Physical Only it would be a Loan In or Lease In transaction.

Lease From
The animal is physically at your institution in exchange for payment of a fee to the legal owner. This is often a temporary transaction such as short term exhibits and special events. This is a Physical Only transaction.

Lease Transfer From
You received the animal from an institution other than the owner in exchange for payment of a fee to the owner. The animal must already be recorded as being out on lease to a facility other than the owner. If the animal comes to you directly from the owner, the transaction is a Lease From. This is a Physical Only transaction.

Lease Return to Us
An animal that was recorded as being out on lease to another institution is returned to you. This is a Physical Only transaction.

Loan In From
You received the animal without acquiring legal title from the owner. There was no payment of a fee to the owner. This is a Physical Only transaction.

Loan Transfer From
You received the animal from an institution other than the owner with no payment of a fee to the owner. The animal must already be recorded as being out on loan to a facility other than the owner. If the animal comes to you directly from the owner, the transaction is a Loan In From. This is a Physical Only transaction.

Loan Return to Us
An animal that was recorded as being out on loan to another institution is returned to you. This is a Physical Only transaction.

Purchase From
You received the physical animal and/or legal title to it with a monetary payment. This transaction can be Physical and Ownership or Ownership Only. It is also considered a commercial transaction in many regions. If it is Physical Only it would be a Loan In or Lease In transaction.

Trade From
You received the physical animal and/or the legal title to it in exchange for another animal or something other than a monetary payment. This exchange can occur now or in the future. It is also considered a commercial transaction in many regions. This is a Physical and Ownership or Ownership Only transaction.

Undetermined

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The Terms are not known at this time but they may be in the future. This could be used as a Term place holder until the true Terms are disclosed, but Best Practices are to use it only for historical transactions where you do not know the Terms at the time of accessing. This is a Physical and Ownership transaction.

Indeterminate
The Terms are not known at this time and they never will be. Best Practices are to use it only for historical transactions where you do not know the Terms at the time of accessing and you never will. This is a Physical and Ownership transaction.

COLLECTED FROM WILD TERMS

Both of the Terms under Collected From Wild can be Physical Only, Ownership Only or both Physical and Ownership transactions. Physical Only is commonly used when species are collected that are governments owned. Ownership Only would be very rarely used.

Collected From Wild
The animal is removed directly from the wild and added to your collection. Usually the collection is done by staff members but not always.

By-catch
The animal was unintentionally removed from the wild. This is most likely to happen when large nets are used to collect birds or aquatic species. Remember that permits may be required and the government doesn't care if you caught it unintentionally, if it needs a permit, a By-Catch still needs a permit.

RESCUED TERMS

There is only one Term that can be selected under the Rescued Mode and that is **Rescued**. Make sure you select the correct Physical/Ownership status. Permits may be required for this transaction.

APPEARED TERMS

There is only one Term that can be selected under the Appeared Mode and that is **Appeared**. Make sure you select the correct Physical/Ownership status. Most Appeared are Physical and Ownership. A Physical Only Appeared may be a government owned species. An Appeared (Ownership Only) would be incredibly rare.

BIRTH/HATCH TERMS

There is only one Term that can be selected under the Birth/Hatch Mode and that is **Birth/Hatch**. All Physical and Ownership statuses are available. If a Birth/Hatch is from a parent(s) who is in on loan, the holder and the owner should communicate who ownership is assigned to at the time of Birth/Hatch.

FROM LAY TERMS

From Lay is the only Term available for this Mode. All three statuses (Physical and Ownership, Physical Only and Ownership Only) are options.

FETUS IDENTIFIED TERMS

Fetus Identified is the only Term available for this Mode. All three statuses (Physical and Ownership, Physical Only and Ownership Only) are options.

RECAPTURED TERMS

Recapture is the only Term available under the Recaptured Mode**.** You have all three status options available – Physical and Ownership, Physical Only and Ownership Only. The status should match what was recorded in the Release to Wild Disposition

RETRIEVAL OF MISSING TERMS

Retrieval is the only Term available under the Retrieval of Missing Mode**.** You have all three status options available – Physical and Ownership, Physical Only and Ownership Only. The status should match what was recorded in the Missing Disposition

DISPOSITION TRANSACTION MODES

Death
The animal has died.

Death/Disposal
This option is available only for a recorded egg, group of eggs or egg mass. It is found in My Transactions > Disposition > Death/Disposal. If the egg(s) was fertile and the embryo died, you should record Death information. If the egg(s) was infertile or fertility status was unknown, you would record information on how you disposed of the egg.

Missing
The animal cannot be found and is known, or assumed, to be outside your facility barriers. If an animal escapes from its enclosure but is known to be on-grounds, that should be captured in an enclosure move (to your institution) or in notes.

Release to Wild
You purposefully released an animal to the wild. If it got out of its enclosure and your institution's perimeter and you did not intend it to, that would be a Missing transaction.

To Another Institution
The physical animal and/or the legal ownership of it was sent to another facility or individual.

Undetermined/Indeterminate
You do not know the disposition Mode. This should be selected only for historical entries. It can be used as a place holder for current records but should be deleted and the correct disposition Mode entered as soon as possible.

DEATH TERMS

There are no Terms associated with Death.

DISPOSAL TERMS

There are no Terms associated with Disposal. Remember, this is found under Death/Disposal.

MISSING TERMS

All of the Missing Terms have the option to select the three statuses –Physical and Ownership, Physical Only and Ownership Only. If you select only the Physical option, ownership of the animal will remain with your institution and it will display in searches and reports.

Disappeared

The animal is missing and specific circumstances cannot be determined. It was there yesterday and today it is not.

Escaped

The animal left your facility of its own volition. Use this Term only if you know the animal escaped, that is someone actually saw it escape or there are signs such as diggings or fences down or damaged.

Historical

At some point in time the animal is no longer in your collections but the Terms are not known. As the Term states, this should only be used for historical entries.

Theft

The intentional removal of the animal from your institution by a person or persons who did not have your permission to do so. Use this term only if there are signs indicating a theft such as broken windows or locks.

RELEASE TO WILD TERMS

Release to Wild is the only Term associated with this transaction Mode. All three statuses are available for selection. If you select only the Physical option, ownership of the animal will remain with your institution and it will display in searches and reports.

TO ANOTHER INSTITUTION TERMS

Designated to Owner of Parent

This Term is recorded by a holding institution when the ownership of an animal via a Birth/Hatch transaction is determined, usually after a designated survivorship period. You can save the transaction ONLY if at least one parent is owned by another institution, otherwise a warning pops up and you cannot save it. If the ownership by the other institution was assigned when the Birth/Hatch was recorded, we do not need to use this Term. This is an Ownership Only transaction.

Donation To

The animal is physically sent to another institution or ownership is given to another and no monetary payment or any other value is given in exchange. If anything is received in exchange for the animal, it is not a Donation but is a Trade transaction. This transaction is Physical and Ownership or Ownership Only.

Lease Return To Owner
An animal that was acquired via a Lease From transaction is returned to the owner. If it is sent to a facility other than the owner, that is a Lease Transfer To. Lease Return is a Physical Only transaction.

Lease To (Initial Transaction)
An animal is physically sent to another institution in exchange for a fee to you but you retain ownership. As the Term states, this is the initial Lease transaction. If the animal is already out on Lease to another institution and it is moved, the owner should Report Holder Change > For Animal out on Lease. Lease To is a Physical Only transaction.

Lease Transfer To
An animal that is held as In On Lease is physically transferred to a third institution, but the ownership is retained by the original owning institution. If the animal is returned to the owner, that is a Lease Return to Owner. Lease Transfer is a Physical Only transaction.

Loan Out To (Initial Transaction)
An animal is physically sent to another institution but you retain ownership. There is no exchange of a fee or anything of monetary value. As the Term states, this is the initial Loan Out transaction. If the animal is already out on Loan to another institution and it is moved, the owner should Report Holder Change > For Animal out on Loan. Loan To is a Physical Only transaction.

Loan Return to Owner
An animal that was in on Loan to you is returned to the owning institution. If it is sent to a facility other than the owner, that is a Loan Transfer To transaction. Loan Return to Owner is a Physical Only transaction.

Loan Transfer To
An animal that was On Loan to you is physically sent to another institution and the original owner retains ownership. If the animal is sent back to the owning institution, that is a Loan Return to Owner transaction. If the owner of an animal in on Loan is changed, you should Report Owner Change and not a Loan Transfer To. Loan Transfer To is a Physical Only transaction.

Physical Transfer To
This transaction is used in a very specific situation where an animal in on Loan/Lease to you is physically sent elsewhere and, at the same time, the owning institution transfers ownership to the receiving institution. The receiver will record as physically receiving the animal from you and receiving the ownership from the original owner.

Trade To

The animal is dispositioned to another facility in exchange for another animal or for something else other than monetary payment. The final exchange may be completed at a future time. This is a Physical and Ownership or an Ownership Only transaction.

Sale

An animal is transferred to another facility in exchange for a monetary fee paid to you. This is a Physical and Ownership or Ownership Only transaction.

Undetermined

The Terms of the transaction are unknown but may be determined in the future. This is a Physical and Ownership transaction.
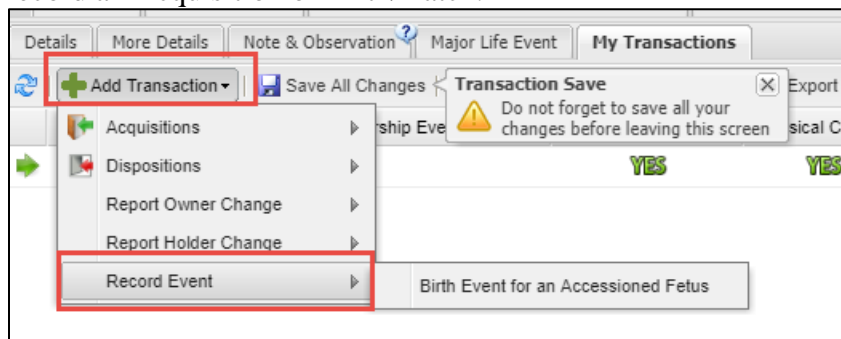
Indeterminate

The Terms of the transaction are unknown and will never be known. This is a Physical and Ownership transaction.

UNDETERMINED/INDETERMINATE

When this accession Mode is selected you need to check a radio button to select Undetermined or Indeterminate. What is checked will drive the Term, **Undetermined** or **Indeterminate,** you can select. Both are Physical and Ownership status. Undetermined should be selected if you don't know the Terms right now but you may. If you have selected Undetermined and discover the appropriate Term later on, this transaction will need to be deleted in the My Transaction stream and the correct Mode and Term entered. Indeterminate means that you will never know the correct Term. Indeterminate is Impossible to know.
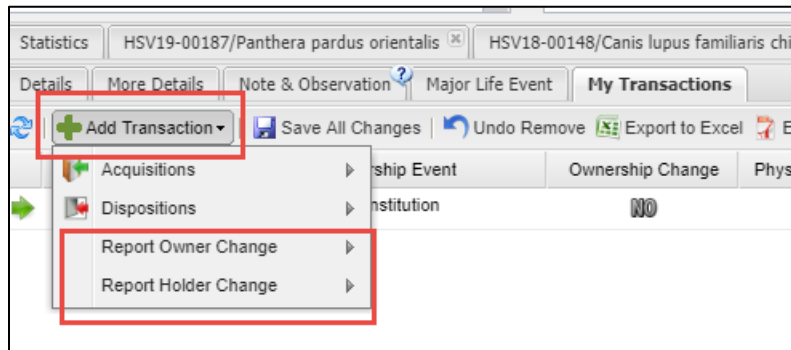
RECORD EVENT

Record Event is found under My Transactions > Add Transaction. You would select Record Event when you want to capture the hatch of a recorded egg or the birth of a recorded fetus. Do NOT try to record an Acquisition of Birth/Hatch.

REPORT CHANGE

Report Change is found under My Transactions > Add Transaction. These terms are used for animals in loan/lease situations. They allow the holder to record a new owner for an animal in on loan and the owner to record a new holder for an animal out on loan. The Ownership and Physical Status do NOT change for these transactions.

Report Owner Change is used by the holder to record a change in ownership for an animal that is in on loan or lease to their facility. This is **not** a true transaction for the holder because there is no change in ownership status (that is they still don't own the animal) and there is no change in the physical status (that is they still physically hold the animal). In this situation, the owner would record the appropriate Ownership Only transaction with the new owning facility. It is important to note that if you receive the ownership of an animal you are holding, you should do a real ownership transaction such as Donation From (Ownership Only). If you select to Record Owner Change instead, your reports can be adversely impacted.

Report Holder Change is used by the owner to record a change in where the animal they own is physically held. The holder would record a Disposition > Loan Transfer To.

SCENARIOS

I found a box at the front gate that contained a ferret.
- Accession > Individual > Appeared

I have an accessioned fetus (or egg) that I want to record a birth (or hatch) for.
- My Transactions > Add Transaction > Record Event

I have an animal in on loan and its owning institution has changed.
- My Transactions > Report Owner Change > For Animal in on Loan

I have an animal in on loan that the owner asked me to send elsewhere.
- My Transactions > Dispositions > Loan Transfer To

I own an animal that was out on loan to one institution but I had them send it to another institution.
- My Transactions > Report Holder Change > For Animal out on Loan

I have an animal out on loan but I want to give ownership to another facility.
- My Transactions > Disposition > record appropriate Ownership Only term

I received an animal in on loan but it came from a facility other than the owner.
- From Another Institution > Loan Transfer From

I collected some flounder using a seine net but some blue crabs were also in the net. I want to add the crabs to our collection.

- Collected From Wild > By-catch

I have an animal that was born/hatched at another facility and it has survived the required 30-day survival period. According to the loan agreement it belongs to my institution.

- Acquisition > From Another Institution > Designated to My Institution

I hold an animal that was a Birth/Hatch and the dam is owned by another facility. It has passed the survivorship period and according to the loan agreement it belongs to the other institution.

- Disposition > To Another Institution > Designated to Owner of Parents

I have an animal both physically and legally. I want to donate the ownership to another facility.

- Disposition > To Another Institution > Donation To (Ownership Only)

I have an animal in on Loan that I am sending to another facility. At the time of the transfer the owner is giving the receiving institution ownership.

- Disposition > Physical Transfer To

I have an animal in on Loan and the Owner is donating it to my institution.

- Acquisition > From Another Institution > Donation Ownership Only)

I have an animal in on Loan and the owner sold the title to it to another facility.

- Add Transaction > Report Owner Change

If you are not certain about what Mode or Term to use, please contact your support person at support@Species360.org. They are happy to help you get it right!!

More Transactions Help

ZIMSHELP-Animals - my transactions - groups
ZIMSHELP-Animals - my transactions - individual
ZIMSHELP-Animals - ownership transaction history
ZIMSHELP-Animals - pending transactions

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