
Recording Visits

How to record Visits in ZIMS

[Contact SPECIES360 Support](#)

Because there is a single record for each animal in ZIMS, an animal is “Accessioned” only once, creating the initial record. All subsequent transfers are recorded as “Visits”. There are three ways to create a Visit:

- Confirm a Pending Transaction. See [Pending Transactions](#). This is a Sender Initiated transaction and the recommended option.
- Start an Accession from the Start menu. This is a Receiver Initiated transaction.
- Create an entry using My Transactions. This is a Receiver Initiated transaction.

The risk of a receiving institution selecting the wrong animal to create a Visit on is higher than the sending institution selecting the wrong animal to send. That is why confirming Pending Transactions is preferred, but not always possible.

When a Visit is created, all of the Globally shared data is displayed in the record.

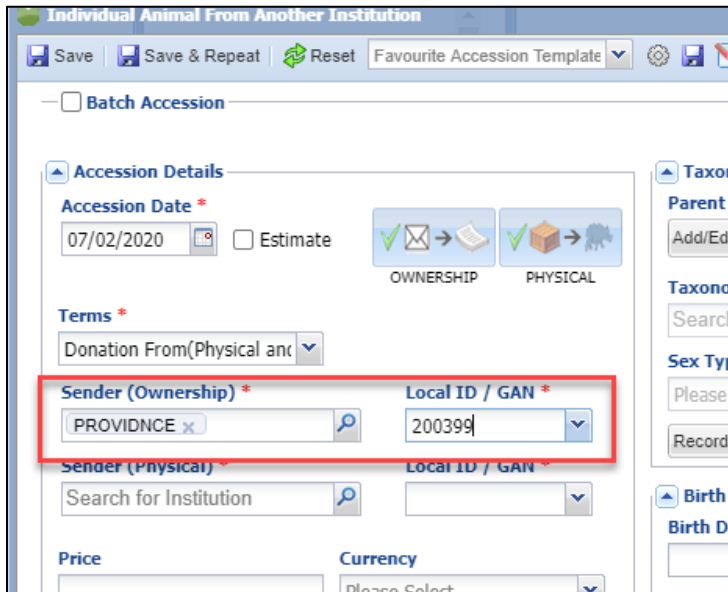
[From the Start Menu](#)

[From My Transactions](#)

[Report Owner Change](#)

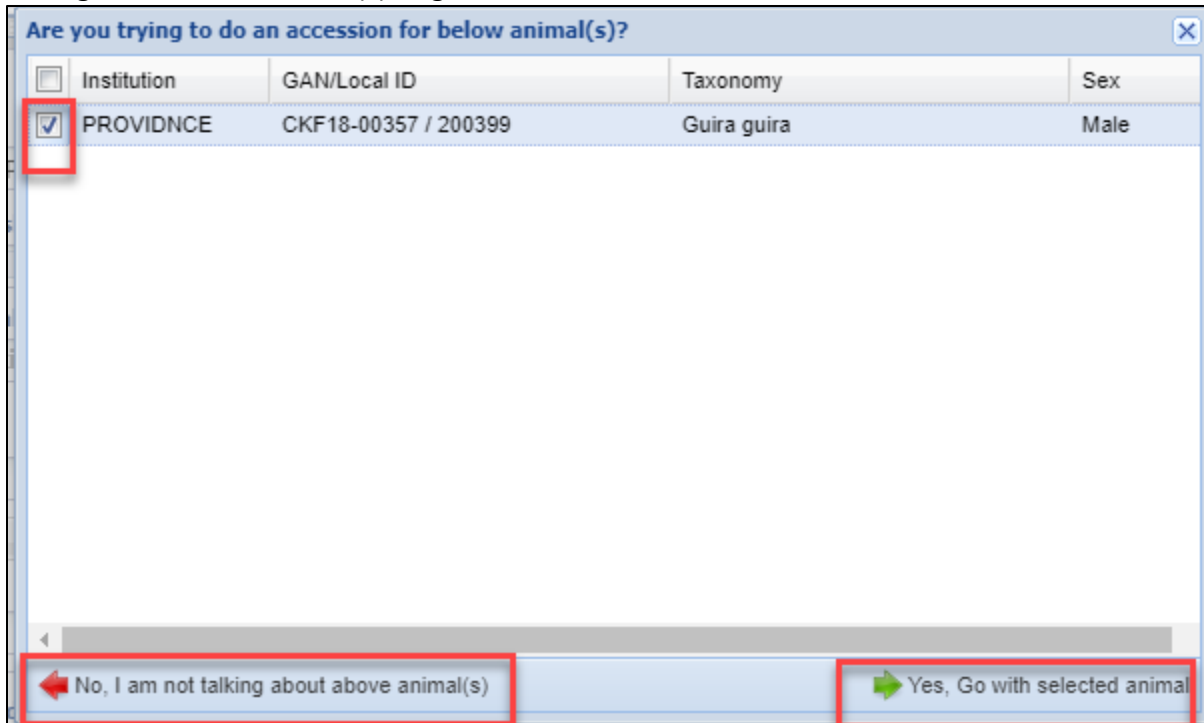
[From the Start Menu](#)

At first glance, it may appear that you are creating a new Accession, but you are not. Go to Start > Accession > Select the Entity > From Another Institution.



Record the Accession Date and Terms. When you select the institution and enter the Local ID or GAN, ZIMS will begin a search to see if they can find the animal in the database.

If a match(es) is found, the results will display. If one of the results is the record you want, check the box and select Yes, Go With Selected Animal. If none of the animals is correct, select No, I am not talking about above animal(s) to go back to the Accession screen.

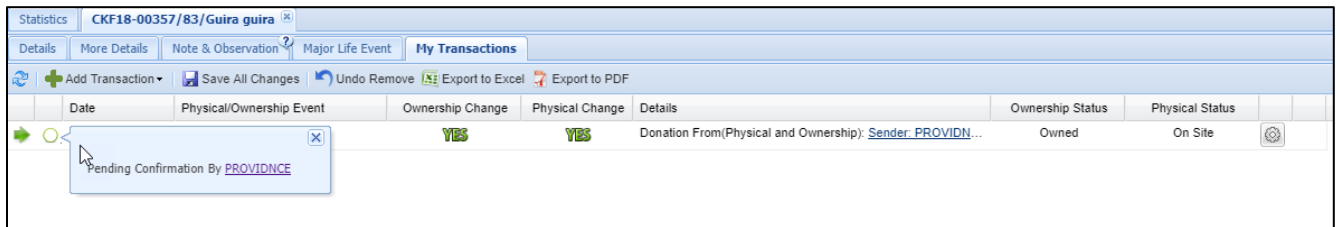


<input type="checkbox"/>	Institution	GAN/Local ID	Taxonomy	Sex
<input checked="" type="checkbox"/>	PROVIDNCE	CKF18-00357 / 200399	Guira guira	Male

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.

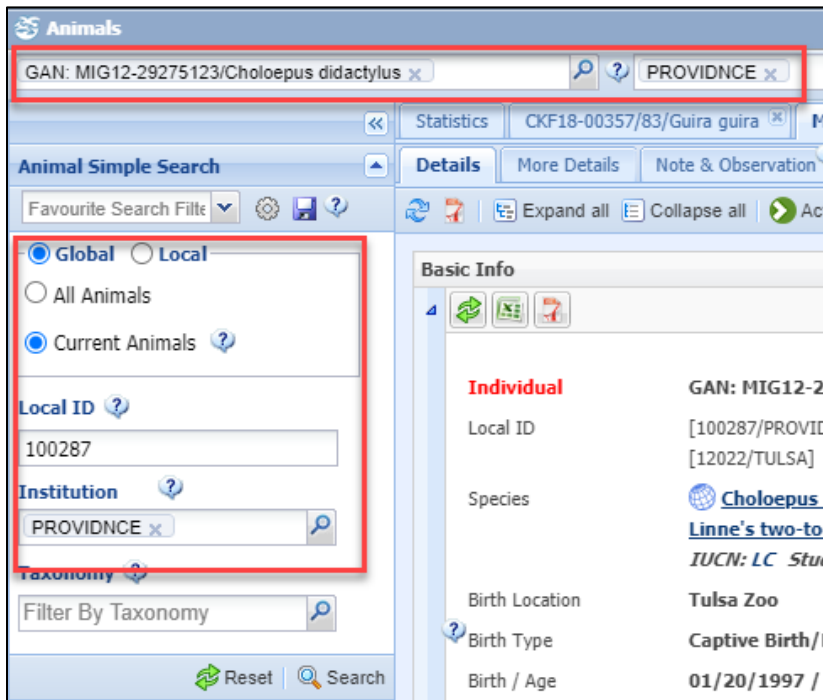
If you select Yes, the Acquisition-From Another Institution screen will appear. Complete the screen and Add To Transaction List. You will receive a message that the holder has not yet recorded sending the animal to you. This is correct so select OK.

Select to Save All Changes. You have now created a Visit at your institution for this animal. The white circle indicates that the Visit is waiting on confirmation from the Sender. They will receive a Pending Transaction to confirm.



From My Transactions

You can also record a Visit from the My Transactions grid in a Global record. Search for the record using the expandable search box (remember to select Global) or the search fields at the top of the screen.



The Global view of the record will display. Go to My Transactions tab. It will be blank. If you previously held or owned the animal it will open your Local record. Select Add Transaction >

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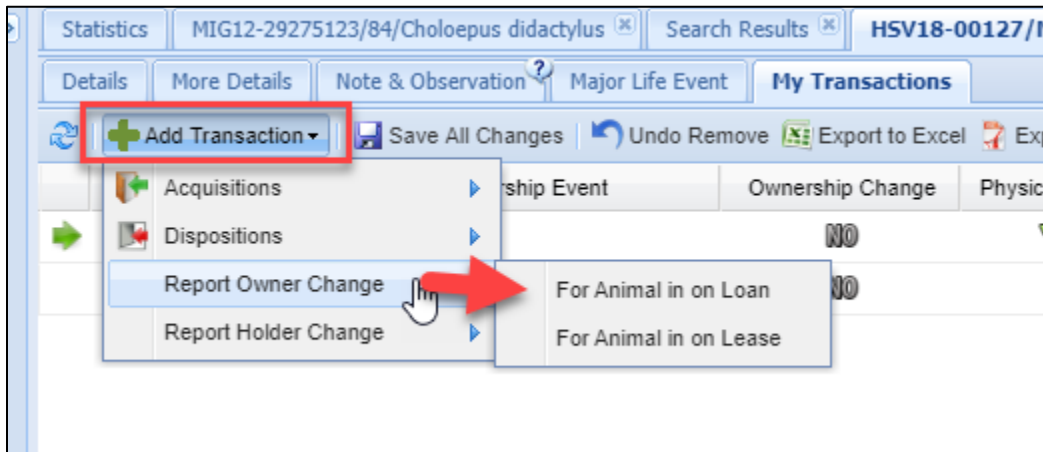
Acquisition > From Another Institution. You will need to record the Date, Terms and your institution information, but the sending institution and their Local ID will prefill.

Once you select Add To Transaction List you will receive a notice that the holder has not yet recorded sending you the animal. This is correct so select OK. Once you Save All Changes you will have successfully created a Visit for the animal. The sending institution will now have a Pending Transaction to confirm.

Date	Physical/Ownership Event	Ownership Change	Physical Change	Details	Ownership Status	Physical Status
07/02/2020	Donation From(Physical and Ownership)	YES	YES	Donation From(Physical and Ownership): Sender: PROVIDN...	Owned	On Site

Report Owner Change

Sometimes an animal you have In On Loan or Lease has a change in ownership. This is not covered as a Visit but as a Record Owner Change under the Add Transaction tab.



Once the ownership change has been recorded and saved, the My Transaction grid will display as an Ownership Transfer.

Revised 14 July 2020