
HELP WITH INVENTORIES AND REPORTING IN ZIMS

Most institutions run annual inventories and must submit various reports to get or retain licenses and permits. This document should help you decide which report to run to get the information that you need. All Reports are found under Start > Reports. See [Reports in ZIMS Husbandry](#) for details on all the reports.

Contact support@Species360.org

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Inventory Detailed

Information Provided

- This Report provides a list by Taxonomy with a Beginning and Ending count and columns for Ins and Outs. The CITES and IUCN status of the species is indicated. Separate lines display the counts for Owned and Onsite, In On Loan, Out On Loan, Groups and Colonies. The total count is displayed at the end as well as a Taxonomic Summary.

Common Uses

- Annual inventories and stock counts

Helpful Hints

- All Collections are included by default, uncheck any that you don't want included.
- Only Animals Owned and Onsite is checked by default. Remember to check other options such as Include Groups and Animals on Loan is desired.
- Groups may not add up if Census is used instead of My Transaction stream. Details on this are available in [Reports in ZIMS Husbandry](#).
- If you select to Include Group Split/Merge Transactions, these will be counted as Acquisitions and Dispositions.
- The Report can be filtered by IUCN or CITES status.

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- By default, the Report is run at the Species level; if you want Subspecies displayed select that in the Taxonomic Resolution.

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Inventory Summary

Information Provided

- This Report is similar to the Inventory Detailed Report except that you must select to run it for Physical (animals held at your institution) or Ownership (animals owned by your institution). There is no CITES or IUCN status or Taxonomic Summary displayed.

Common Uses

- Good for a quick count of animals that are being managed at your institution.

Helpful Hints

- All Collections are included by default, uncheck any that you don't want included.
- Groups may not add up if Census is used instead of My Transaction stream. Details on this are available in [Reports in ZIMS Husbandry](#).
- If you select to Include Group Split/Merge Transactions, these will be counted as Acquisitions and Dispositions.
- By default, the Report is run at the Species level; if you want Subspecies displayed select that in the Taxonomic Resolution.

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Multi Facility inventory

Information Provided

- This report can only be run by a parent organization or association. When run for 'Physical' it will show you animal counts for any of your child institutions in one report with separate lines for each institution. When run for 'Ownership' it will display total counts for each species owned by the parent organization or association regardless of where they are physically held. The filters are the same as an inventory summary report. IUCN and CITES listing will display for each species line in the 'Physical' report.

Common Uses

- Quick count of animals being managed across multiple child institutions.

Helpful hints

- All child institutions will be included by default, use the drop down to select specific institutions.
- Groups may not add up if Census is used instead of My Transaction stream. Details on this are available in [Reports in ZIMS Husbandry](#).

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- If you select to Include Group Split/Merge Transactions, these will be counted as Acquisitions and Dispositions.
- By default, the Report is run at the Species level; if you want Subspecies displayed select that in the Taxonomic Resolution.

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Loan

Information Provided

- This Report will display information on animals either in on loan to you or out on loan from you. Whereas the Summary Inventory Report only displays the count, this Report displays the animal details.

Common Uses

- If run for animals Loan Out it is very useful to identify animals you own that are held by other institutions for annual status and health updates.
- If run for Loan In it is very helpful to identify animals that you hold but do not own especially if there are any medical concerns or reproduction where you would need to contact the owner.

Helpful Hints

- Make sure your Veterinary department has an updated list of the animals in on loan. Many loan agreements require prior notification for non-emergency medical procedures.
- All Collections are included by default, uncheck any that you don't want included.
- You can filter by a specific institution.
- You can include Identifiers and Notes if desired.

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Peak Holding

Information Provided

- This Report displays the highest number of a species during a specified date range.

Common Uses

- This Report is often used in the United States for the annual USDA license report requirements.

Helpful Hints

- You can restrict the Report to domestic or wild species.
- This is one of the few Reports where you can select to include Pre-Births (eggs and fetuses).
- All Collections are included by default, uncheck any that you don't want included.

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Taxon

Information Provided

- This Report displays information on a single Taxon and can be run for Individuals Only, Groups Only or Both. It can be filtered by All or Physical and Ownership status.

Common Uses

- Often requested by Studbook Keepers for yearly updates on their studbook species. The Suggested Animals and Pending Updates available in ZIMS for Studbooks has greatly reduced the need for this request, however.
- Because you can include Permits, this is a good Report to run to check if you have assigned appropriate Permits to your permitted species.

Helpful Hints

- This report can be run at the Global level and a specific Institution can be selected.
- This is one of the few Reports where you can select to include Pre-Births (eggs and fetuses).
- All Collections are included by default, uncheck any that you don't want included.
- Identifiers and Notes can be included if desired.
- By default, Taxonomy below the selected level is checked so remember to uncheck that if not desired.
- The Report can be filtered by Sex Type if desired.
- If running for Groups, remember to check the Include Census Records option if desired.

Transaction

Information Provided

- This Report lists Acquisitions (including Births/Hatches) and Dispositions (including Deaths) over a date range. A specific institution can be selected, and the Report can be filtered by All, Physical or Ownership transactions.

Common Uses

- This is a good Report to track how many animals are being purchased/sold verses donated.
- It is helpful to identify how many Births/Deaths you had last year.
- The Specific Party filter allows you to track transactions with a single Institution.

Helpful Hints

- The default is all transaction types but use the Advanced Transaction Filter to select specific transaction types such as Purchased From Another Institution or Partial Group transactions.
- There are many options to sort the Reports so remember to select your desired sort order.

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- This is one of the few Reports where you can select to include Pre-Births (eggs and fetuses).
 - You have the option to show Preferred ID or Local ID.

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Wild Acquisitions

Information Provided

- This Report displays all animals Collected from the Wild or as By-catch over a date range. It can be filtered by Location, Water Type, Collection Method and Permit.

Common Uses

- This is a very common annual reporting requirement for aquariums.

Helpful Hints

- There are many options for sorting the Report such as Collection Method and Location.
- You can select to display the Local ID, GAN or Preferred ID.

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