

USING FILTERS AND CREATING FAVORITE FILTERS IN ZIMS STUDBOOKS

ZIMS Studbooks has many filters to help you narrow your animal lists for both Living Animals and All Animals in the studbook. It also has the ability for you to create and save favorite filters to help you reduce search time.

Contact support@Species360.org

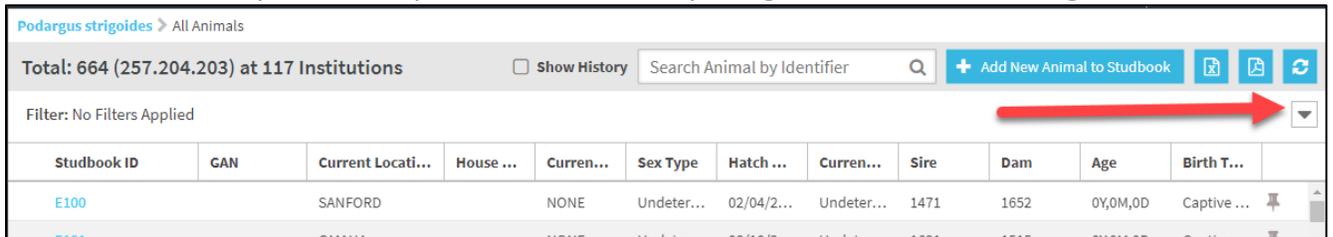
Topics Covered

[Filtering Your Animal Lists](#)

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Filtering Your Animal Lists

To filter your Animal Lists, select View List for either Living Animals or All Animals from the Studbook Dashboard. You may need to expand the filter area by using the arrow to the far right.



Podargus strigoides > All Animals

Total: 664 (257.204.203) at 117 Institutions Show History Search Animal by Identifier

Filter: No Filters Applied 

Studbook ID	GAN	Current Locati...	House ...	Curren...	Sex Type	Hatch ...	Curren...	Sire	Dam	Age	Birth T...	
E100		SANFORD		NONE	Undeter...	02/04/2...	Undeter...	1471	1652	0Y,0M,0D	Captive ...	
E101		OMAHA		NONE	Undeter...	08/10/2...	Undeter...	1621	1515	0Y,0M,0D	Captive ...	

General Tab

By default, the General (Animal information) tab opens. If a box is blank the filtering is unrestricted for that field. The more fields with filters, the smaller the animal list becomes. The following filters are available:

- Status: If you are in Living Animals, the default Status is Alive. If you are in All Animals, there is no default Status.
- Taxonomy: The species/subspecies covered by the studbook are available to select from.
- Sex Type: Select as desired.
- Breeding: Select Has Bred or Has Not Bred. ZIMS will search on the Parent field.
- Transaction: Select as desired.
- Birth Type: Select as desired.
- Rearing: Select as desired.
- Parent: This does not capture the actual Parents recorded for the animal but the Parent types (i.e. MULTs, WILDs and Undetermined/Indeterminate ones).
- Between Ages: You can select the ages of the animals desired.
- Studbook ID: You can select Numerical (starting with a number), Not Numerical (starting with a letter, these are often Temporary IDs) or All

To run the filter, select the Search button in the lower right-hand corner. Your selected filters will display at the top along with how many animals and institutions are included in the Animal List.

[Podargus strigoides](#) > Animal List: Filtered

Total: 45 (0.45.0) at 35 Institutions Show History

Filter: Status = Alive and Sex = Female and Rearing = Hand and As of 09/25/2020

Studbook ID ↑	GAN	Hatch Date	Sex Type	Current Location
1343	27850914	03/16/1990	Female	PHOENIX AZ
1155	2422222	01/25/1999	Female	PHOENIX AZ

Date Tab

The options are:

- As of End Date: This is the default selection and the End Date is today's date but can be edited.
- Date Range: You can enter a Start and End Date
- No Restriction: All dates will be included.

When you select to Search, this filter will be added to the General filter results because we have not cleared that filter. Note how there are now fewer animals and institutions in your Animal List results grid.

[Podargus strigoides](#) > Animal List: Filtered

Total: 33 (0.33.0) at 25 Institutions Show History

Filter: Status = Alive and Sex = Female and Rearing = Hand and During 01/01/1990 - 01/01/1995

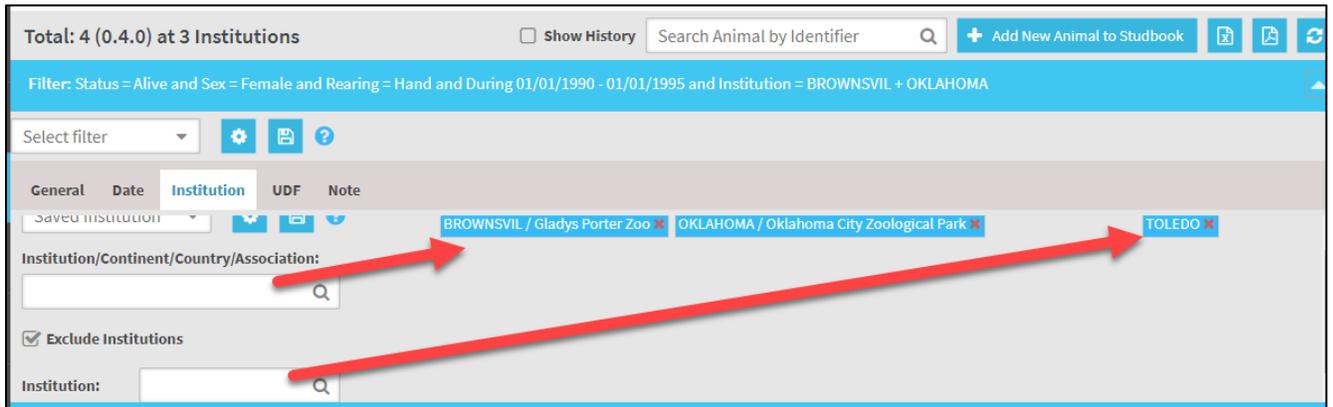
Studbook ID ↑	GAN	Hatch Date	Sex Type	Current Location
1030	MIG12-28251719	05/02/1975	Female	SEAWLD TX
1197	3653760	04/21/1985	Female	W PALM BE

Institution Tab

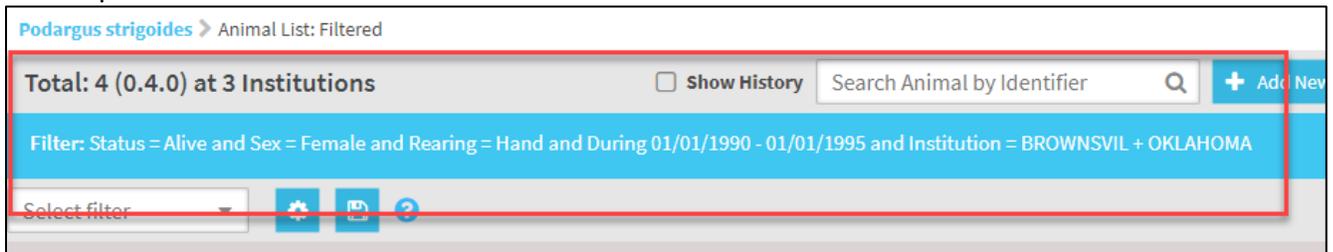
You can select specific institutions to include or exclude in the list.

- Institution/Continent/Country/Association: Enter the single or multiple institutions, geographic areas or Associations that you want to include. They will display on the right.

- Exclude Institutions: Check the box to activate the field. You cannot select regions or Associations. They will display on the far right.



Note how the number of animals and institutions continues to decrease as we have kept the filters for the previous tabs active.



Note that filtering by institutions may include animals that are no longer held at the institution(s) selected. If they have ever been held there, they will display in the animal list. Below we filtered by BROWNSVIL and OKLAHOMA. The MEMPHIS animal is included because it was born at OKLAHOMA.

Studbook ID	GAN	Hatch Date	Sex Type	Current Location ↑	Current Local ID	Sire	Dam	
1257	13776518	07/24/1987	Female	BROWNSVIL	3482	1061	1044	📌
1448	2191441	03/24/1993	Female	BROWNSVIL	5498	1200	1399	📌
1495	963736	08/29/1994	Female	MEMPHIS	15108	1132	1332	📌
1332	449972	01/04/1990	Female	OKLAHOMA	526806	1238	1237	📌

UDF Tab

You can also filter by UDF fields. Select the tab and select to Add Filter.

Use the UDF dropdown to select the desired UDF to filter by. For your Value select if you want it to Equal or Does Not Equal the Value entered. You can enter multiple UDFs by selecting to Add Filter again. Your Animal List results will continue to be more restricted.

Note Tab

You can filter in Notes by the following fields:

- Note Text: This is a free text field so much match what was entered.
- Note Type: Select from the Note Type drop down list.
- Keywords: This is a free text field so must match what was entered.
- Note Sub Type: This field is active only if a Note Type has been selected.

Some hints for using filters:

- Filters build on each other. If you are not getting the results you anticipated, you may have an active filter in another tab!
- Selecting the Reset button (lower right of the filter screen) will reset ALL the tabs to their defaults. If you want to reset only one tab you must manually remove the filtering.
- If the filter list becomes too long to view in entirety, select the “...” to view the entire list of filters.

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Creating Favorite Filters

You can save favorite filters for both the Animals and Institutions tabs. These saved filters can help save you time for commonly used filters.

Animals Tab

To create a saved filter for Animals, select the General (default) tab.

Podargus strigoides > Animal List: Filtered

Total: 33 (0.33.0) at 29 Institutions

Filter: Sex = Female and Breeding = Has bred and Rearing = Hand

Select filter [Settings] [Save] [Help]

General | Date | Institution | UDF | Note

Status (Select one or more) Taxonomy (Select one or more) Sex Type Breeding Transaction

Birth Type Rearing Parent Between Ages

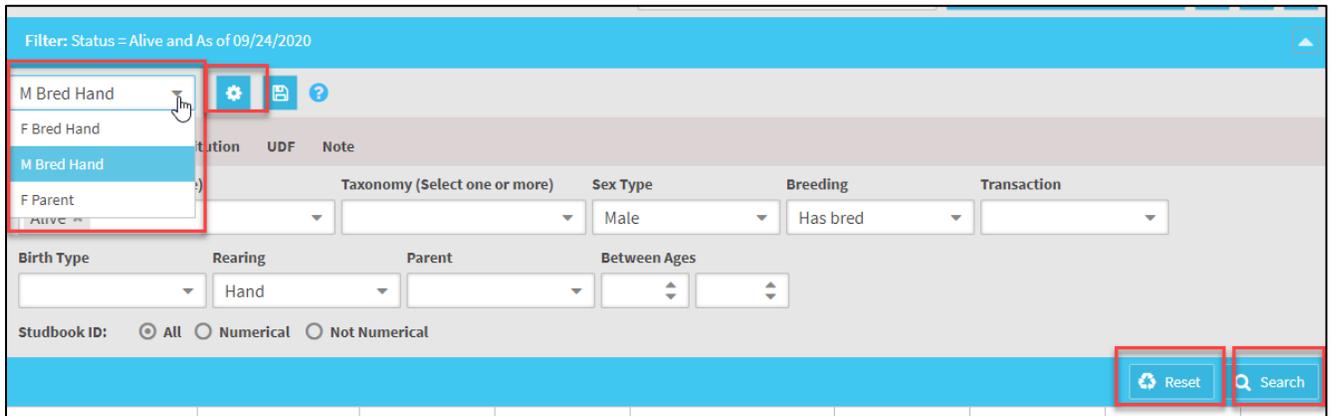
Studbook ID: All Numerical Not Numerical

Complete the fields that you want for your filter. Above we have selected a filter for Sex = Female, Breeding = Has Bred and Rearing = Hand. The filters will display in the upper left-hand corner. Once you have selected what you desire to save, select the Save icon at the top.

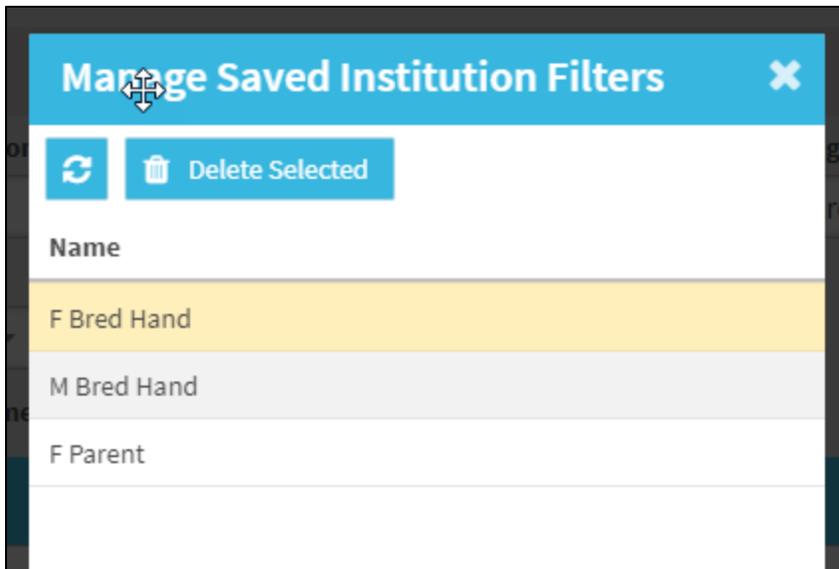
Add New Favorite Filter [Close]

Name:

You then name the filter. You may want to develop naming conventions to help you easily find the filter later should you create several favorite filters. You can Save the filter for later use or Save it and also Run it right now.



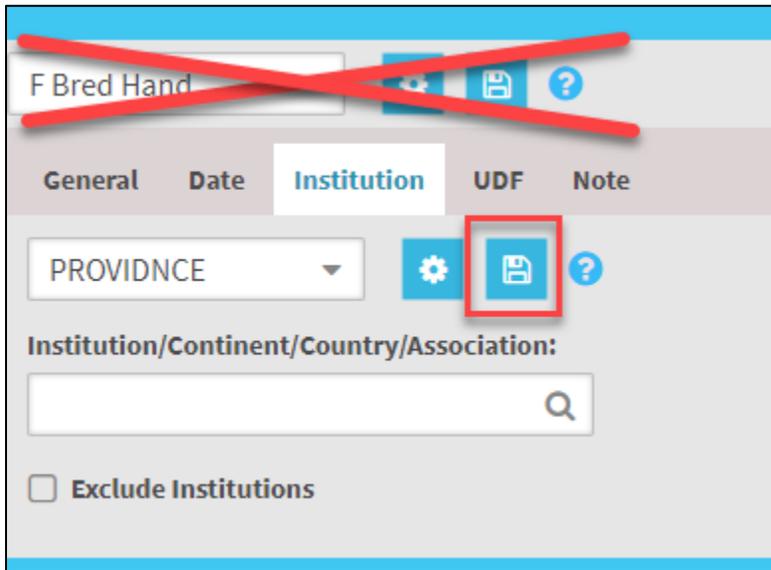
To use a favorite filter, select it from the filter drop down list and select the Search button in the lower right. To reset the filter to the default, select the Reset button to the left of the Search button. To manage your favorite filter list, select the wheel icon at the top.



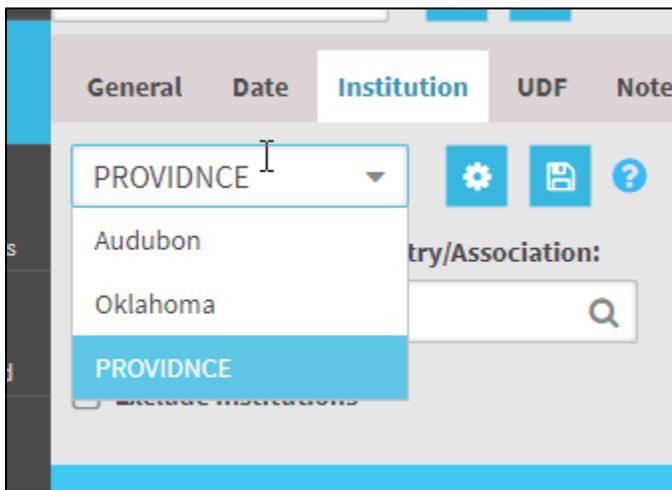
Here you can delete any filters that you no longer need.

Institution Tab

To create a favorite filter for Institutions, select the Institution tab. Select the Institutions as desired. You can save a filter for multiple institutions. Select the Save icon to the right of the institution.

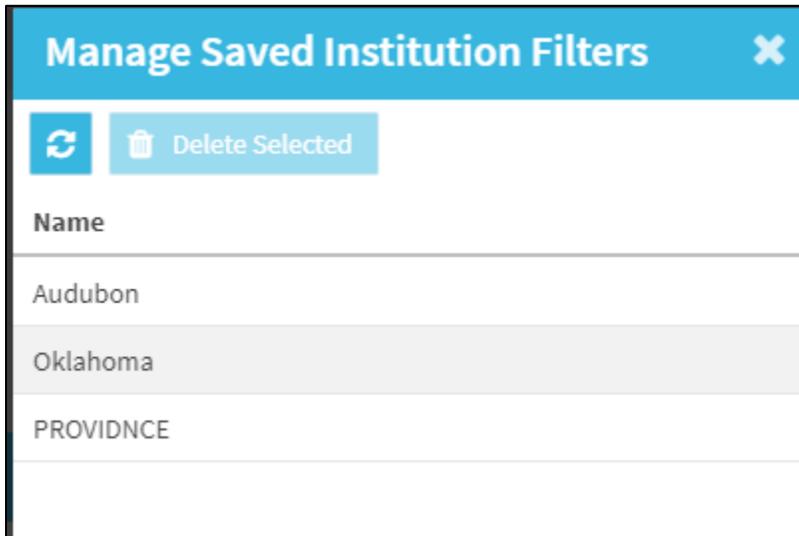


NOTE! When saving an Institution filter use the icons to the right of the Institution NOT the icons above. That filter is sourced from the General tab and always displays in the Institution tab.



To select a saved Institution, select from the drop down to the right of the Institution.

As for managing Animal favorite filters, select the wheel icon to the right of the Institution. Here you can remove any Institutions no longer wanted.



Institution favorite filters are available to select from when exporting to PMx and when running reports and exports. This saved filter functionality replaces the .FED file in SPARKS.

REMEMBER!

- For your searches and saved favorites, ZIMS looks at ALL tabs. If you want to save a favorite just for animal data, make sure that all the fields in all the other tabs are blank (unrestricted).
- When creating a favorite filter using multiple tabs, the Institution tab information will not save as part of the filter, you need to save that favorite separately using the Saved Institution field and select it when running your other favorite filter.

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