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## EDUCATORS AND PROGRAM ANIMAL GUIDE

ZIMS can provide zoo and aquarium Educators with a wealth of knowledge about the animals in the collection.

Contact [support@Species360.org](mailto:support@Species360.org)

### Topics Covered

[Getting Started with ZIMS](#)

[Finding Animals](#)

[Animal Details](#)

[Managing Your Programs](#)

[Questions on Your Collection](#)

[Enclosure/Occupant Information](#)

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### Getting Started

#### How can I get access to the ZIMS database?

- See your Local Admin, most often the Registrar, to discuss what information you would like access to. They will probably give you a Read Only Role where you can access data but not add it, edit it or delete it.
- *Set up an appointment with your Local Admin and be prepared with a list of what you would like to be able to view so they can assign you the proper Role access.*

#### How do I get into ZIMS?

- Your Local Admin will give you a Username and Password for you to use. Before you can use them, you will need to confirm your email address. ZIMS will send you an email detailing how to do this. Once confirmed, go to [zims.species360.org](http://zims.species360.org).
- *For security reasons we recommend that you change your Password. You can use the forgotten Password link anytime you log in or go to Start > My Preferences > Account Settings and select Change Password. You can also change your Username here.*

#### I don't understand this ZIMS vocabulary!

- The following are a few terms that are often used in ZIMS
  - GAN - Global Accession number assigned by the ZIMS application when the animal is first accessioned in to ZIMS. This number never changes regardless of how many institutions an animal is held. If the animal moves, a

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Visit is created by the new institution. This keeps the one record per animal/group intact.

- Global record - This is the view you have for animals that your institution never held or owned. Select parts of the record and notes are seen. The background of a Global record is blue. If another institution selects to externally share a record with you, you will see more details but still not all that you would see for a Local record. The background for a shared record is white.
- Local Admin - The staff member assigned to manage ZIMS at your institution. Their responsibilities include adding Staff and assigning ZIMS Roles.
- Local ID - This number is assigned by each institution that holds/owns the animal. It should not change within the Institution that assigned it but if the animal is held/owned by multiple institutions it will have multiple Local IDs.
- Local record - This is the view you have for animals that your institution held or owned. The complete record and all Notes are seen if you have been given the access. For a Local record the background is pink.
- Preferred ID - This is the identifier that the Local Admin has assigned to display in searches and reports. It is most often the Local ID but can also be House Name or tag/band. Preferred ID is selected for each animal so it could be House Name for your polar bear but band for your penguin.
- ZIMS Role - Your access to the ZIMS functionalities are controlled by the ZIMS Role that you are assigned. Roles are assigned by Search/View, Add, Edit and Remove abilities. Roles ensure that you have access only to the ZIMS functionality that you need.

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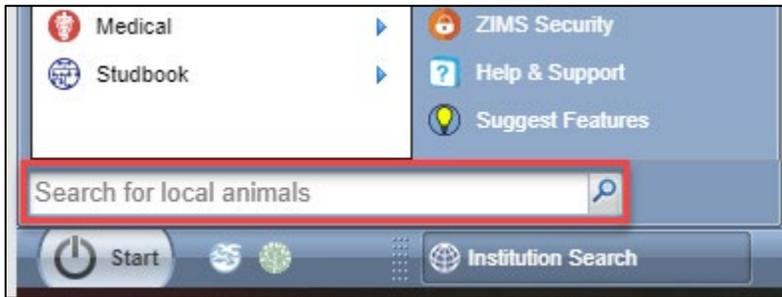
## Find Animals

### How do I find animals in ZIMS?

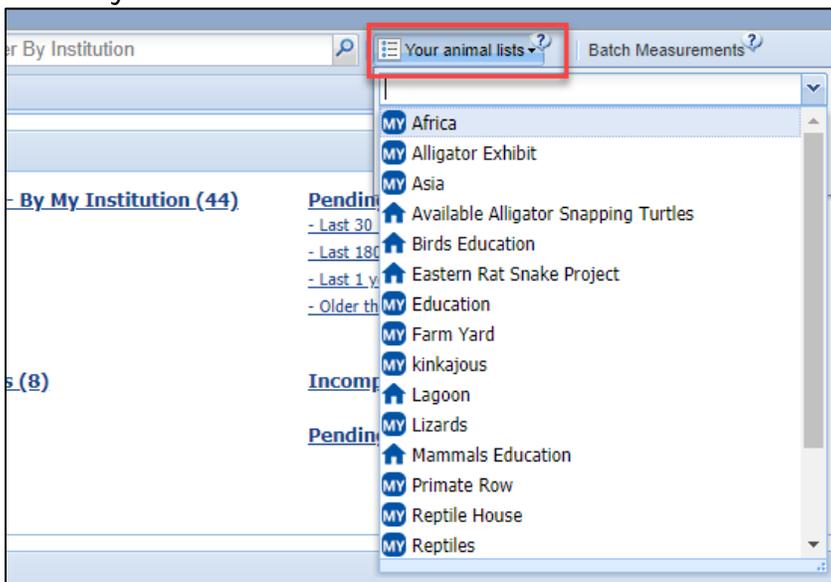
- To find animals in ZIMS you need to know something about them! You can search from the Start menu using the Search for Local Animals box. This field searches ONLY for Local records. Here you can enter House Name, Local ID, most other Identifiers or the GAN as well as Taxonomy. Possible matches will display, and you can select the desired animal.

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- You can also find animals using the left-hand expandable search grid when the Animals module is open. To open the Animals module, select the desktop icon or go to Start > Animals > Search. The Animal Simple Search is basic, but the Animal Advanced Search gives you many options for finding animals. Once you complete your filters select Search (way at the bottom of Advanced Search) and a results grid will display any animals that match your filters. Select the Animal GAN hyperlink to take you into the desired record. In addition to Local animals you can search for Global animals (animals your institution has never held or owned) in these searches by selecting the Global radio button.
- If someone has created Animal Lists by area or Teams, this is an easy way to find animals. Your Animal Lists are found at the top of the Animals module. Once the List is selected a results grid will display and you can select the Animal GAN hyperlink to take you into the desired record. Animal Lists contain only Local animals.



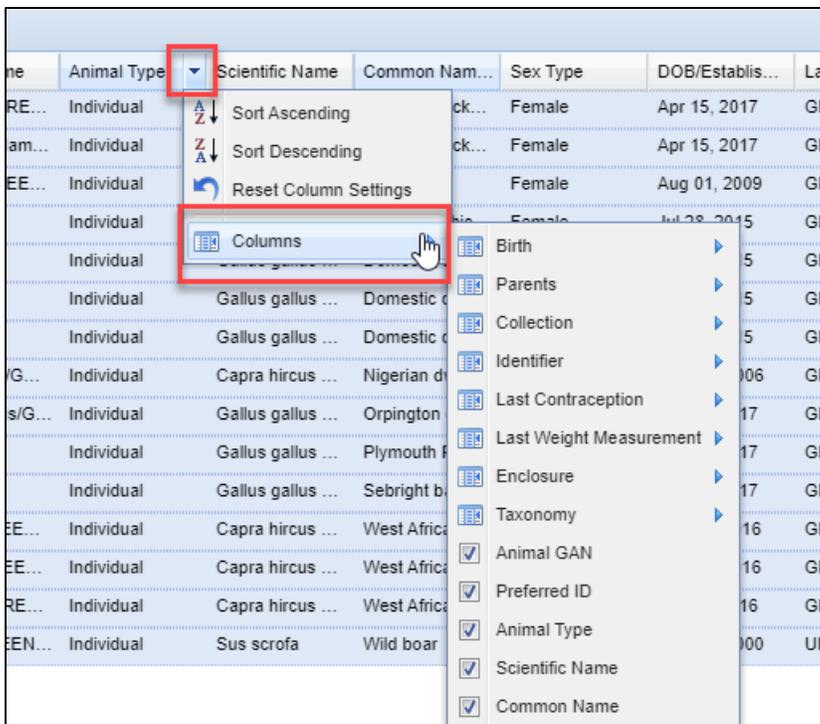
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- You can also find Local or Global animals using the fields at the top of the Animals module. If you want to filter by Institution, make sure you enter that first before entering the Animal Identifier.



### Can I change the columns in my animal results grids?

- You may not want to view all the columns that are displayed by default in your Animal results lists or there may be something you want to see but isn't displayed. You can delete (or add) columns! Select the down arrow to the right of any column header.



Check the topics you want to see and uncheck the topics you don't want to see. Below we have customized the columns so only the desired information is displayed. You can also change the column order by dragging and dropping from the header.

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Animal GAN	House Name	Sex Type	Animal Type	Common Name	Age	Current Enclosures
HSV18-00121	[Covlick/GREENVISC]	Female	Individual	Brahma chicken (light)	3Y,5M,28D	<a href="#">Chickens/ Ducks</a>
HSV18-00122	[Brahma Mama/GREENVISC]	Female	Individual	Brahma chicken (light)	1Y,8M,18D at the time of death	~
27447039	[Grace/GREENVISC]	Female	Individual	Call duck	9Y,5M,5D at the time of death	~
HSV15-01872		Female	Individual	Domestic chicken (breed unspecified)	5Y,2M,15D	<a href="#">Chickens/ Ducks</a>
HSV15-01871		Female	Individual	Domestic chicken (breed unspecified)	5Y,2M,15D	<a href="#">Chickens/ Ducks</a>
HSV15-01869		Female	Individual	Domestic chicken (breed unspecified)	5Y,2M,15D	<a href="#">Aviary</a>
HSV15-01870		Female	Individual	Domestic chicken (breed unspecified)	5Y,2M,15D	<a href="#">Chickens/ Ducks</a>
20955570	[Sweetpea/GREENVISC] [Sweetpea/KNO...]	Female	Individual	Nigerian dwarf goat	14Y,5M,5D	<a href="#">Goats</a>
HSV18-00119	[Bette Davis/GREENVISC]	Female	Individual	Orpington chicken (buff)	3Y,5M,28D	<a href="#">Farm Yard (public access)</a>
HSV18-00120		Female	Individual	Plymouth Rock chicken (silver pencil)	3Y,5M,28D	<a href="#">Chickens/ Ducks</a>
HSV18-00116		Male	Individual	Sebright bantam chicken	3Y,5M,28D	<a href="#">Chickens/ Ducks</a>
HSV16-00046	[Layla/GREENVISC] [Zoey/GREENVISC]	Female	Individual	West African pygmy goat	3Y,4M,17D at the time of death	~
HSV16-00047	[Daisy/GREENVISC] [Violet/GREENVISC]	Female	Individual	West African pygmy goat	4Y,6M,13D	<a href="#">Goats</a>
HSV16-00048	[Pepper/GREENVISC] [Jewel/GREENVISC]	Female	Individual	West African pygmy goat	4Y,6M,9D	<a href="#">Goats</a>
MIG12-28191509	[Osric/GREENVISC]	Male	Individual	Wild boar	20Y,2M,2D at the time of lost ISIS tracking	~

- Do NOT uncheck the Animal GAN option as that provides the hyperlink into the actual animal record.

**I don't recognize the long number on the tab, can I make it simpler?**

- By default, the GAN (Global Accession Number) displays in the tab. To also display the Preferred Identifier, go to Start > My Preferences > Application Preferences > Identifier and check the box for Include Preferred ID on animal tab. The Preferred ID, most likely the Local ID or House Name, will now display on the tab in addition to the GAN.



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**Animal Basic Details**

**I often get questions about our animals such as How old is it? What does it weigh? Who are its Parents? What is its Name? Where was it born? How can I find out this information?**

- As described above you can use column customization to add much of this information to a search results grid or Animal List.
- But the best way is to open the animal record itself instead of impacting the columns in your results lists. You can find the following information from within the animal's record:

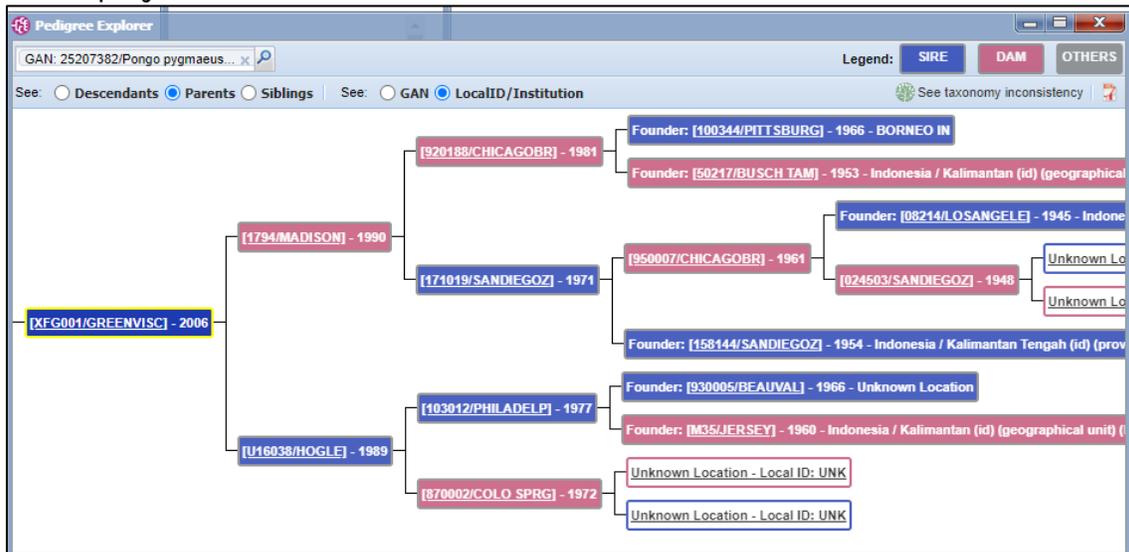
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- Details tab
  - Basic Info - An at-a-glance look at the animal such as entity (group, individual, egg, fetus), status (alive, dead, lost to follow-up (no longer at a Species360 member institution)), house name, birth/hatch location, birth/hatch date and current enclosure
  - Physical Holder History - All the institutions where the animal has been held
  - Ownership Transaction History - All the institutions that have owned the animal
  - Weights - For a good visual select to View Weight Graph
  - Contraception - Current and past contraception
  - Enclosures - Current and past enclosures
  - Identifiers - All the current and past identifiers
  - Parent Info - The sire(s) and dam(s) and the percentage probability that they are the Parents
  - Lengths - View Length Graph also available
  - Rearing - Rearing over time
  - Census Info (groups only) - The actual or estimated number of animals in the group
  - Taxonomy / Sex Type / Collection - You can see if Taxonomy or Sex have been changed over time
  - Alerts - Any Calendar tasks recorded
  - Images - Pictures of the animal
- More Details tab
  - Development Milestones - When the animal reached a milestone in its development. Examples of milestones are first eating solid food or weaning.
  - Training Information - Any behaviors being trained, and sessions recorded for the training
  - Feed Logs - Record of items fed and consumed
  - Enrichment - Enrichment items given and animal response
  - Responsible Party - Staff member or Team who oversees the animal
  - Birth/Hatch Date and Event Location - Captures certain events in the animal's life
  - Permits - Any permits that have been assigned to the animal
  - Management Plan - Information about any managed populations the animal is a part of
- Notes & Observations tab - Free text fields recorded on the animal
- Major Life Event tab - Also captures events in the life
- My Transactions - Any transactions your institution has had with the animal
- *If you do not see the topic, talk with your Local Admin about adding the access to your Role.*

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**Where can I find information about an animal’s relatives?**

- You can see the Parents in More Details > Parents grid. But to go further back in the ancestry go to Start > Tools > Pedigree Explorer. Search for an animal using GAN, Local ID or most Identifiers. You can then select to see Descendants, Parents (and back as far as is known) or Siblings. You also select to have the GAN or the Local ID display.



- The hyperlinks will open the record for further information.

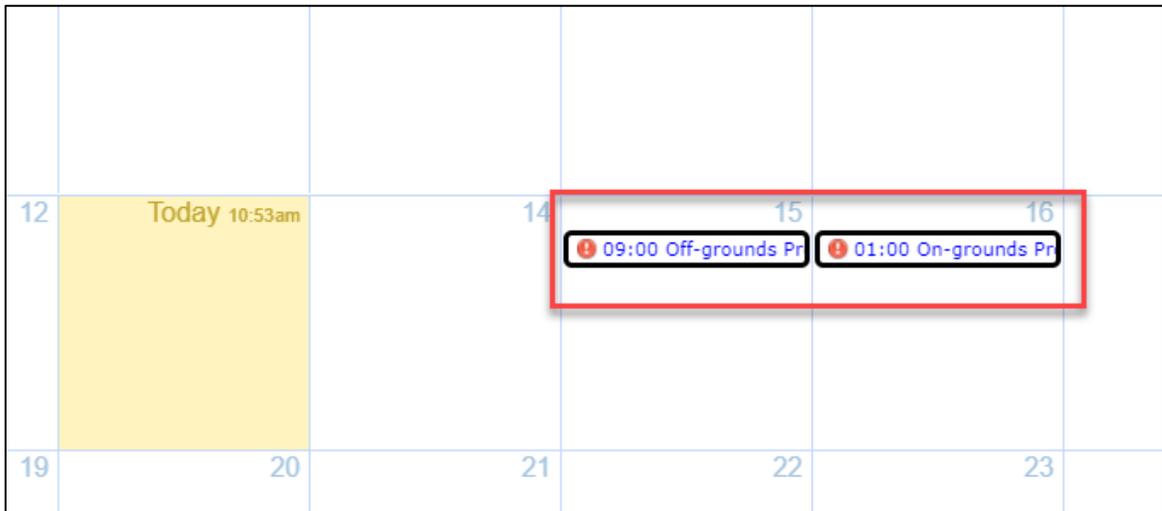
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**Managing Programs**

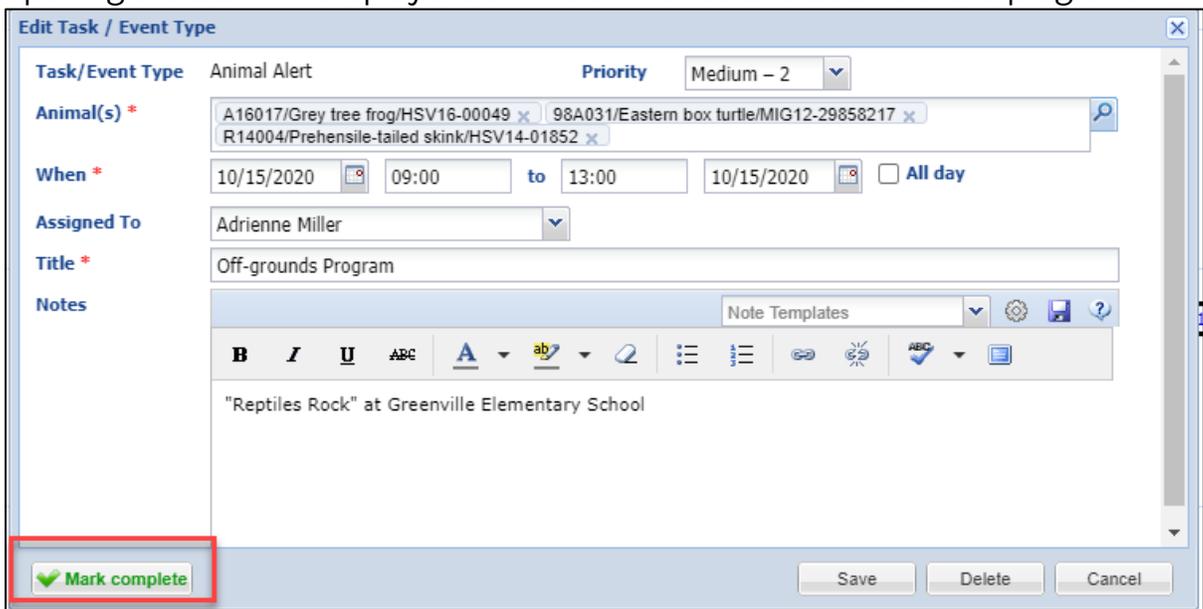
**How can I see what education programs are scheduled in ZIMS?**

- Education programs can be scheduled using My Calendar. Even if you can’t do the scheduling yourself, if given a Search/View Role you can find any Calendar items assigned to you or your Team. Below you see two upcoming programs that have been assigned to you.

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Opening the task will display the animals involved and details of the program.



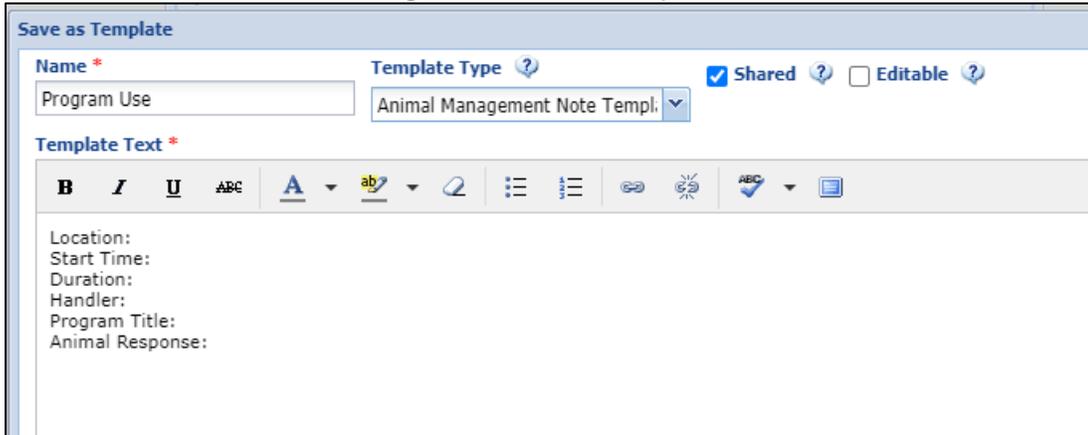
- Once presented, you can mark the task as Complete and it can be hidden from the Calendar so only active tasks remain.

**When animals are used in programs, I like to record a note about how it went. Is there any way I don't forget to capture the information I want to record?**

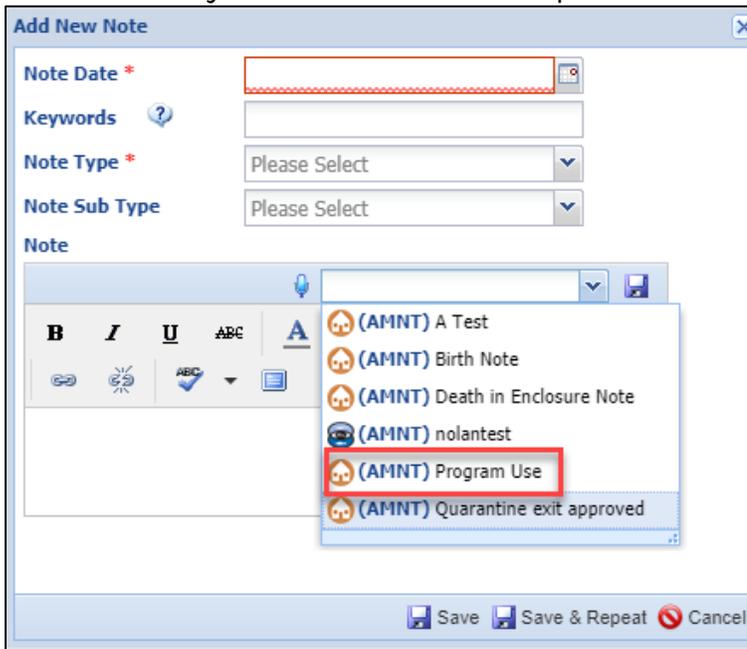
- Note Templates can help you remember to capture everything you want to record in a Note. Work with your Local Admin to have a Template developed for this purpose. Below a Template was created for Program Use. The Name should be unique and you will need to indicate if it will be shared with others (if you did not create the

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Template it will have to be shared for you to use it) and editable by others. Because this Template was created from within the Husbandry record, the Template Type will default to Animal Management Note Template, which it should.



Now, when you want to add a new Note, the Template can be selected from the drop-down list and you will remember to capture all the data you desired.

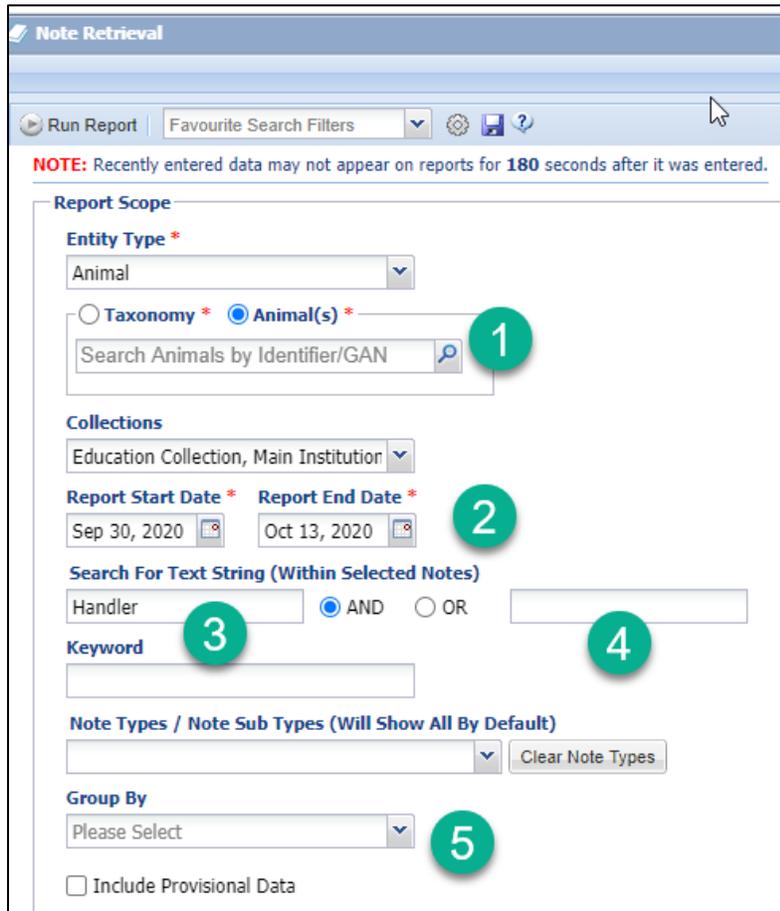


- Because this requires actual data entry, a Search/View Role will not allow you to do this. Check with your Local Admin about getting the ability to Add a Note added to your Role. They may want to give you Provisional access to do this. Provisional entries must be approved prior to becoming part of the ZIMS database.

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### How can I track who is handling the animals?

- The Note Retrieval Report is a perfect way to answer this question, especially if you have a Note Template like the one created above.



The screenshot shows the 'Note Retrieval' interface. At the top, there is a 'Run Report' button and a 'Favourite Search Filters' dropdown. A note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' The main form is divided into several sections:

- Report Scope:**
  - Entity Type \*:** A dropdown menu set to 'Animal'.
  - Taxonomy \*:** Radio buttons for 'Taxonomy \*' and 'Animal(s) \*', with 'Animal(s) \*' selected.
  - Search Animals by Identifier/GAN:** A search input field with a magnifying glass icon, circled with a green '1'.
- Collections:** A dropdown menu set to 'Education Collection, Main Institution'.
- Report Start Date \* / Report End Date \*:** Two date pickers. The first is set to 'Sep 30, 2020' and the second to 'Oct 13, 2020', circled with a green '2'.
- Search For Text String (Within Selected Notes):**
  - Keyword:** An input field containing 'Handler', circled with a green '3'.
  - Logic:** Radio buttons for 'AND' (selected) and 'OR'.
  - Search String:** An empty input field, circled with a green '4'.
- Note Types / Note Sub Types (Will Show All By Default):** A dropdown menu and a 'Clear Note Types' button.
- Group By:** A dropdown menu set to 'Please Select', circled with a green '5'.
- Include Provisional Data:** An unchecked checkbox.

- 1.If you want to find who handled a specific animal select it here.
- 2.If a date range is desired enter it here.
- 3.If you want to find all handlers search for “handler”.
- 4.If you want to find a specific handler add the name here.
- 5.You also have options for grouping the report.

The report will let you know who is handling what animals and when.

### Is there an easy way to track when animals are used in programs?

- The Care and Welfare module is a good place to capture this information. You will need to work closely with your Local Admin to configure the Indicators and create the Templates. The benefit of using this module is that you can graph/chart your entries for quick visual assessments. You could also use the Note Retrieval Report as described above if you use a Keyword to indicate Program Use.
- *Recording data in the Care and Welfare module will require you to have Add access in addition to Search/View access. Provisional access is not available in this module.*

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### Information About Your Collection

#### How can I find out how many animals we have?

- The Institution statistics tab under My Institution (Start > My Institution) is a wealth of information about your institution's collection. The nice thing about it is that it is updated every time a record is added to ZIMS, so it is up to date. Some things it can help you answer:
  - How many births/hatches did you have in the past year?
  - How many animals do you hold?
  - How many species do you hold?
  - How many enclosures do you have?

#### How can I find out how many mammals, birds, reptiles, etc. that we hold?

- To get this information run a Detailed Inventory Report from Start > Reports. On the last page is a break down by Class.

<b>Institution Inventory Taxonomic Summary:</b>	
<b>Arachnida</b>	
Owned	11 Individuals, 8 Species
On Site	12 Individuals, 9 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Insecta</b>	
Owned	2 Individuals, 1 Species
On Site	2 Individuals, 1 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Diplopoda</b>	
Owned	18 Individuals, 1 Species
On Site	18 Individuals, 1 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Amphibia</b>	
Owned	5 Individuals, 3 Species
On Site	5 Individuals, 3 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Reptilia</b>	
Owned	70 Individuals, 30 Species
On Site	70 Individuals, 30 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Aves</b>	
Owned	64 Individuals, 22 Species
On Site	64 Individuals, 22 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species
<b>Mammalia</b>	
Owned	40 Individuals, 22 Species
On Site	41 Individuals, 22 Species
Groups *	0 Individuals, 0 Species
Colonies	0 Individuals, 0 Species

### What is our oldest animal?

- From the Animals module use the left-hand expandable search box and Animal Simple Search. Filter by Local > Current Animals > Owned but Off Site unchecked. Make sure that Age is a column in your results grid (see changing columns in the [Finding Animals](#) section). Sort the Age column by Descending order. Your oldest animal will be at the top!

### How many offspring have the Chilean flamingos had in the past ten years?

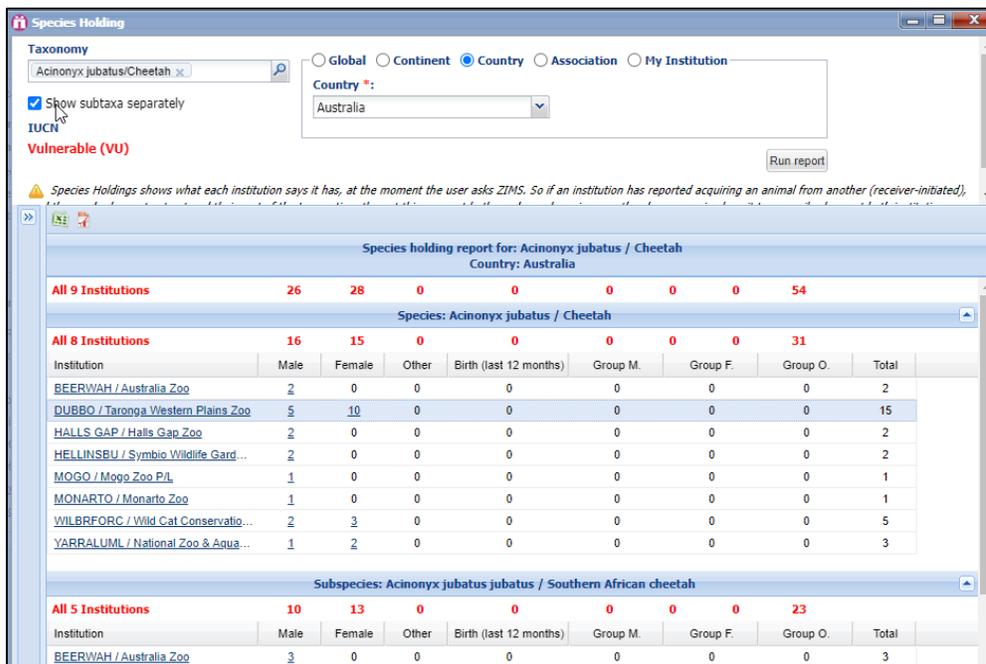
- From the Animals module use the expandable search box and Animal Advanced Search. Filter by Taxonomy = Chilean flamingo and Birth Date Range = last ten years.

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From the results grid, remove any results whose Birth/Hatch Location is not your institution (you may need to add Birth/Hatch Location as columns).

### How can I find out what institutions in my country hold a species that a visitor is interested in?

- Select Species Holding either from the desktop icon or Start > Global Resources > Animal Management/Husbandry > Species Holdings. Filter by Taxonomy > Country (yours) and Run Report. In the results grid, the Institution is a hyperlink into its Basic Details and the numbers in the Sex column will open a list of the animals to view their records. Below we searched for cheetahs in Australia.



**Species Holding**

Taxonomy: Acinonyx jubatus/Cheetah

Country: Australia

**Species holding report for: Acinonyx jubatus / Cheetah**  
Country: Australia

**All 9 Institutions**      26      28      0      0      0      0      0      54

**Species: Acinonyx jubatus / Cheetah**

Institution	Male	Female	Other	Birth (last 12 months)	Group M.	Group F.	Group O.	Total
BEERWAH / Australia Zoo	2	0	0	0	0	0	0	2
DUBBO / Taronga Western Plains Zoo	5	10	0	0	0	0	0	15
HALLS GAP / Halls Gap Zoo	2	0	0	0	0	0	0	2
HELLINSEBU / Symbio Wildlife Gard...	2	0	0	0	0	0	0	2
MOGO / Mogo Zoo P/L	1	0	0	0	0	0	0	1
MONARTO / Monarto Zoo	1	0	0	0	0	0	0	1
WILBRFORC / Wild Cat Conservatio...	2	3	0	0	0	0	0	5
YARRALUM / National Zoo & Aqua...	1	2	0	0	0	0	0	3

**Subspecies: Acinonyx jubatus jubatus / Southern African cheetah**

**All 5 Institutions**      10      13      0      0      0      0      0      23

Institution	Male	Female	Other	Birth (last 12 months)	Group M.	Group F.	Group O.	Total
BEERWAH / Australia Zoo	3	0	0	0	0	0	0	3

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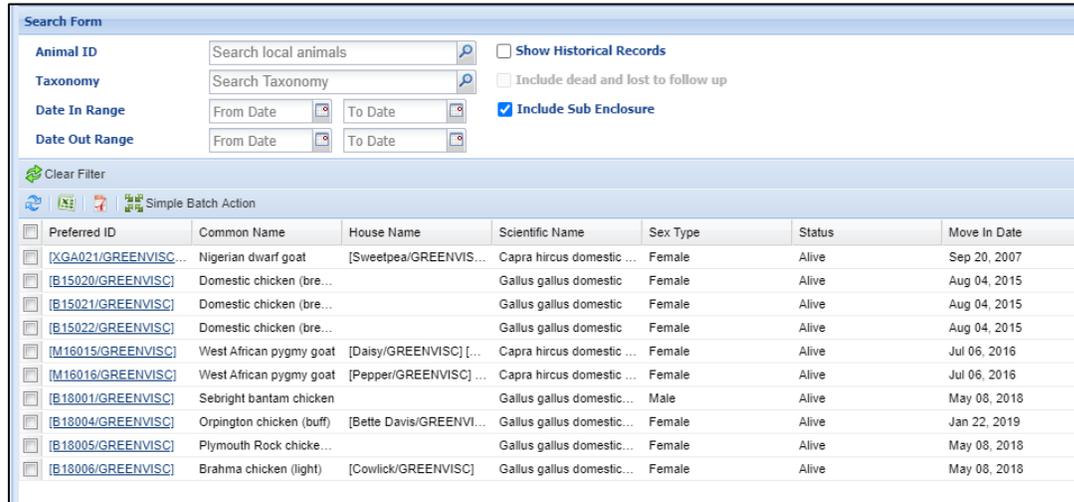
### Enclosure Occupant Information

We have a big mixed species exhibit and I am always forgetting who is in there. How can I find out what animals are in an exhibit?

- Use the Enclosure module to find this information. Go to Start > Enclosures (or select the desktop icon). You can search for the enclosure using the left-hand search box or find it in the Enclosure Tree and left click on it. Select the Occupants tab. The list will display what animals are currently in the enclosure. You can customize the Enclosure columns like you can customize Animal columns (See

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Finding Animals above). The Animal GAN or Preferred ID hyperlink will take you in to the animal record.



Preferred ID	Common Name	House Name	Scientific Name	Sex Type	Status	Move In Date
[XGA021/GREENVISC]	Nigerian dwarf goat	[Sweetpea/GREENVIS...	Capra hircus domestic ...	Female	Alive	Sep 20, 2007
[B15020/GREENVISC]	Domestic chicken (bre...		Gallus gallus domestic	Female	Alive	Aug 04, 2015
[B15021/GREENVISC]	Domestic chicken (bre...		Gallus gallus domestic	Female	Alive	Aug 04, 2015
[B15022/GREENVISC]	Domestic chicken (bre...		Gallus gallus domestic	Female	Alive	Aug 04, 2015
[M16015/GREENVISC]	West African pygmy goat	[Daisy/GREENVISC] [...	Capra hircus domestic ...	Female	Alive	Jul 06, 2016
[M16016/GREENVISC]	West African pygmy goat	[Pepper/GREENVISC] ...	Capra hircus domestic ...	Female	Alive	Jul 06, 2016
[B18001/GREENVISC]	Sebright bantam chicken		Gallus gallus domestic...	Male	Alive	May 08, 2018
[B18004/GREENVISC]	Orpington chicken (buff)	[Bette Davis/GREENVI...	Gallus gallus domestic...	Female	Alive	Jan 22, 2019
[B18005/GREENVISC]	Plymouth Rock chicke...		Gallus gallus domestic...	Female	Alive	May 08, 2018
[B18006/GREENVISC]	Brahma chicken (light)	[Cowlick/GREENVISC]	Gallus gallus domestic...	Female	Alive	May 08, 2018

- Use the expandable search grid above the results list to search for historical Occupants or include Sub-enclosures of the selected Enclosure.

### How can I find out how cold the King penguin pool is?

- From within an Enclosure record, go to the Environmental Measurements (terrestrial enclosures) or the Water Quality Measurements (aquatic enclosures). You can even view a graph to see if the temperature changes over the year.

### How big is the African flight cage?

- From the Enclosure module, search for the African flight cage or find it in the Enclosure Tree. Under the More Details tab open the Dimensions grid.
- *This, of course, is only useful if someone has taken the time to record the dimensions!*

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### Customize Access to ZIMS via Your Role

The following information is mainly for your Local Admin should you want to be able to answer the questions presented above. For these scenarios, a custom Role was created with the following access:

- Animals
  - Acq/Disp Transaction – Search/View
  - Alert – Search/View
  - Animal Lists – Search/View

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- Animal/Basic Detail – Search/View
- Contraception – Search/View
- Enrichment Item – Search/View
- Development Milestone – Search/View
- Enclosure History – Search/View
- Enrichment Item – Search/View
- Feed Log – Search View
- Holder History – Search/View
- Identifier – Search/View
- Image – Search/View
- Measurement – Search/View
- Note – Search/View and Add
- Rearing – Search/View
- Training Info – Search/View
- Calendar
  - Animal Alert – Search/View and Add
- Care and Welfare
  - C & W Indicator
  - C & W Measurement
  - C & W Report
- Enclosure
  - Dimension – Search/View
  - Enclosure/Basic Detail – Search/View
  - Environmental Measurement – Search/View
  - Occupant – Search/View
- Global Reports & Tools
  - Pedigree Explorer – Search/View
  - Species Holding – Search/View
- Institution
  - Institution/Basic Detail – Search/View
- Local Reports & Tools
  - Inventory Report – Search/View
  - Note Retrieval Report

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**Revised 7 February 2022**

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