Hands On Your Data! 2019 ZRA Workshop

Welcome to the 2019 ZRA Conference ZIMS Workshop! You will be working in your own Live data using some of the recent/new functionality available in ZIMS or using some of the ZIMS Tools that will help you clean up your data. It's your choice! The Species360 Staff are here to help guide you and answer any questions that you have.

The following Tools are available to use. Remember that access to these Tools is dependent upon your ZIMS Roles, so you may not see them all.

- Pending Transactions
- Species360 Post Office
- Data Quality
- Incomplete Necropsies
- Incomplete Accessions
- Pending Taxonomic Changes

The following cheat sheets contain information that will help you understand and develop a Husbandry Log Template and get started in the Care and Welfare modules. There are also instructions for using the various Tools.

You can pick one topic and work on it, or try them all to make sure you understand how to use them. Take advantage, especially for Pendings, of other Registrars being in the same room with you. You may be able to clear up some confusing transactions.

The Species360 Staff will be available the entire conference should you have any questions from this workshop or about ZIMS or Species360 in general.

Happy Hands On!

Care and Welfare

Start > Animals > Care and Welfare

The Care and Welfare module allows for easy tracking of the physical and mental well-being of the animals in your care. There are three steps to this module:

1. Configure your Indicators
2. Create Templates using these Indicators
3. Use the Templates to record the data

It is important to note that this information does not go directly into the animal record, it is held within the Care and Welfare module. However, from within the animal's record you can quickly view the Chart and List of the data that was recorded on the animal. Don't worry about working in Live as you can delete Templates and data when done and Roll Back any configured Indicators.

To configure Indicators:

- Select Indicators from the left hand list
- Select Please Configure for an Indicator you want to use
    - Any Indicators whose Value Type is Please Configure will need to be configured. Only configure the Indicators that you will be using.
- Assign Value Type
    - Numeric Value – free choice of numbers
    - Percentage – amount out of 100
    - Numeric Scale – numbers with definitions
    - Binary Scale – simple Yes or No
- Explanation
    - Use to detail why you picked that Value Type and what you hope to capture by using it.
- Next
- Define Value Type
    - This is where you provide details and the screen varies with what Value Type you selected
    - Although indicating the Expected Value/Range is not mandatory, if what you record does not fall within what you expect you will receive notification and this data will display as "out of range" on the Charts
    - Add Taxonomic Exceptions allows you to redefine the Value Type for other species. We won't do that right now.
    - Save
- Configure another Indicator

To create Templates:

- Select Templates from left hand list
- Select green "+" (the Add New icon)
- Name the Template
- Decide if you want to Share with others and/or allow others to Edit the Template
- Select entity (pick two Animals for this practice session)

- Animal – enter one, select Add New to add another
    - Animal List – as the Animal List is updated, the animals in the template will be updated
    - Enclosure – all Occupants at the time will be included in the Template. This will update as Occupants change
    - Enclosure List – as for Enclosures
    - Taxonomy – be aware that at this time the animals in the Template will not be updated as new members of the selected Taxonomy come and go
- Select what Indicators you want to include
- Save

Use the Template

- Select Templates from left hand list
- Select Template Name hyperlink
- Enter some data for three different days using Save and Repeat, then Save and Close

Look at a Chart

- Select Chart from left hand list
- Enter an Animal used in the Template
- Select a From and To Date that will include the dates you made observations.
- Switch to List View (upper right hand corner)
    - This is where you would Edit or Delete entries.
    - If this was just for practice delete the records (repeat for the second Animal) using the trash can icon

If you want to delete the Template, open Templates and use the trash can icon to delete. If you want to remove the Indicator Configuration use Data Entry Monitor to roll it back.

Husbandry Log Template

Start > Tools > Manage Templates

Husbandry Log Templates allow you to create a template that captures the information you need to gather either during your daily work or when data entry is intensive such as monthly weighing of multiple animals or scheduled extra maintenance of enclosures. They are especially helpful if you have keeper staff entering their own data.

Our practice template will be to record Feed Logs on multiple animals and record Environmental or Water Quality Measurements on their enclosure. Do not worry about working in Live. If you do not want the template after you are done you can roll it back using Data Entry Monitoring.

Highlight Husbandry Log Template and select the green "+" icon at the top. This is the Add New icon throughout the template.

- Name the Template with a unique name that will help you easily find it. Some institutions have many templates!
- Decide if you want to Share the template or allow others to Edit it.
- Sheet 1 is going to be for your animals, so name that accordingly.
- Select the green "+" icon to add the data you want to record.
- Type in your first animal. Because the first record entered was an animal, you can only select additional animals, you cannot have mixed entities such as animals and enclosures. Add additional animals as desired.
- Once all your animals are added open the Type options. Because the entity is animals the Type options are all animal related. Select Animal Feeding Log.
  - All mandatory fields are already turned on (green slide bar) and will display in the template.
  - You can select default entries as desired. These will be editable.
  - If you do NOT want the UOM editable you can lock it by selecting the "lock" icon after you have entered your desired UOM.
  - The remaining fields can be added to your template by sliding the ball from the left to the right.
  - Any fields with a green slide bar will display in the template.
  - Save & Close the sheet.
- Now create a sheet for the Enclosure measurements. Select the green "+" icon next to your first sheet.
  - Name the sheet as desired.
  - Select the green "+" icon to add your data.
  - Type in the appropriate Enclosure(s).
  - When done open the Type field. All the Types are now Enclosure related topics.
  - Select Enclosure Measurement.
  - Select what measurements you want to record, adding fields as needed.
  - If you want to lock the Type or UOM you can do so.
  - Save & Close the sheet.
  - Save & Close the template.
  - Your template is now ready to use!
- Select the template hyperlink in your template list.

  - NOTE: If you do not actually want this information to go into your records you can Save as Draft and then delete the Draft
  - Start recording your animal data
  - Once all mandatory fields in a column are completed the column will turn green, meaning the information will be saved.
  - If you started completing a column but did not fill in all the mandatory fields it will be red and the information will not be saved.
  - Note in the bottom left hand corner the template is continually saved as a draft so you will not lose any information.
  - You can add a new line for an animal by selecting the "+" in the column.
  - To add a new line for all the records select the Add New ate the bottom
  - All mandatory fields are already turned on (green slide bar) and will display in the template.
  - You can select default entries as desired. These will be editable.
  - If you do NOT want the UOM editable you can lock it by selecting the "lock" icon after you have entered your desired UOM.
  - The remaining fields can be added to your template by sliding the ball from the left to the right.
  - Any fields with a green slide bar will display in the template.
  - You will record the Enclosure Measurements later so Select the Save as Draft option using the arrow to the left of Save & Close.
- Select Husbandry Log under Draft Records on the left hand side.
  - Select the template from the list
  - Open the Enclosure sheet and complete
  - Now select to Save & Close ONLY IF YOU WANT THE DATA TO GO INTO THE RECORDS! Otherwise, select to Save as Draft again.
  - To delete the Draft information, you recorded simply select the trash icon to the right of the template hyperlink under Draft Records > Husbandry Log Templates
  - To delete the template itself go to Husbandry Log Templates under Templates and select the trash icon.

Pending Transactions

Animals > Statistics > Pending Transactions

Current Pendings (last 30 days) are usually easy to deal with as they are fresh on everyone's mind and should be addressed as soon as they come in. The ones that become more difficult are those that are over a year old.

Some hints for this workshop if you select to work on Pendings:

- Look at your By Other Institution Pendings and see if the institution is represented by any workshop attendees. You may be able to get them to address them now!
- If you have more than one Pending transaction in a record you will not be able to successfully Save My Transactions until they have all been addressed.
- If any records have been Denied by another institution they are noted in the Species360 Post Office and Highlighted in red in the Pending animal list. If you agree with them you need to go into your records and remove the My Transaction record.
- Look at the "Yes" and "No" in the Ownership Change and Physical Change columns. Green means incoming, red means outgoing and grey means no change to the status for your institution.
- Read the left hand colored circles by hovering over them. They will let you know what information may be missing.
- If the circle indicates there may be another record that is a possible match you should look at that record globally and compare. If you agree it is a match, contact the institution noted. If you both agree, contact support and ask them to merge the records. If you don't agree, or you are having trouble contacting the institution, you can contact support for further assistance. One common cause for mis-matches is if an institution recorded a Local ID incorrectly. Once this is corrected the possible match will go away.
- Use the terms correctly:
    - Confirm/Edit – you agree with the transaction
    - Deny – you disagree with the transaction
        - Example: You did receive a parrot from Institution A but the identifiers on the bird do not match the record. They probably selected the wrong record. Institution A will need to delete that transaction and correct it to the appropriate bird.
    - No Information Available – the transaction may or may not be correct but you have nothing regarding it to be able to Confirm or Deny it
        - Example: You have a Pending from 10 years ago for an antelope. You know you had antelope a while ago but there is no information available to confirm that this antelope was indeed received by you. There is no action needed to be taken by the Sender. Their My Transactions will indicate that you had no information on it.
    - Not Recorded in ZIMS – you agree that the transaction took place but you did not/will not record the animal involved into ZIMS
        - Example: You sent some coral to Institution B. Institution B does not record coral into ZIMS. There is no action required by you and your My Transactions will indicate that they do not intend to record it in ZIMS
    - Delete – this is not actually a viable option for Pendings as you cannot Delete something that was not entered by you.
- If you have selected a term other than Confirmed the transaction will disappear from your records. If, at a later date, you decide you should have confirmed it, go into My Transactions in the record and check the Include Unconfirmed Transaction in the upper right hand corner. It will magically reappear so you can confirm.

Species360 Post Office

Desktop icon or Start menu

The Species360 Post Office contains a lot of valuable information. Some messages are simply a heads up and no action needs to be taken. There are some messages, however, that do require an action on your part. To read the entire message double left click on it.

The Post Office functions like Outlook. Everyone who has access to the Post Office must manage their own. Ideally, only those Staff members who will actively manage their own Post Office need access to it.

Some examples of messages that do NOT require an action on your part:

- Term Dictionary – updates to the Medical Term Dictionary and promotion to Global Term
- Treatment Formulation Clean-up – formulation clean-up and mapping to Global Terms

Some examples of messages that DO require an action on your part:

- Animal Merged – check the records and make sure the merge was correct
- Transaction – another institution has selected something other than Confirmed for a transaction with you. Check your My Transaction record and determine if it may have been an error on your part.
- Taxonomy changes – marked Obsolete, changes in order, you may or may not want to accept the changes for your Local records
- Sex Type Change – check your records and decide if you wish to update the record

Are you feeling overwhelmed by too many Post Office messages that you will never have the time to go through? Here's an idea:

1. Export your messages to Excel
2. Save it someplace you will remember
3. Move all your current messages to Trash and Delete them
4. Resolve that you will look at your Post Office every day and take appropriate actions and move to Trash
5. When you have time you can go through the saved Excel file and delete any messages that do not require an action
6. And you can take action on any messages that did require an action

Historically, ZIMS created Post Office messages for things that also created Pendings. This is one reason there may be so many messages for you to sort out. This should not happen now, so if a Pending Transaction is created there will be no duplicate information in your Post Office.

Data Quality Tool

Start > Institution > Data Management > Data Quality

The Data Quality Tool lets you know the number of records with possible data quality issues. This chart can be filtered by IUCN High Priority species to help you address those records first. Most of these errors occurred from migration because ARKS (the application prior to ZIMS) allowed you to do things that ZIMS does not. Double click on a slice of the pie to drill down further into the charts. Any time you want to go back select the Back to Quality Indicator in the upper right of the chart. Do NOT use the back arrow as this will take you back to your ZIMS desktop. You will eventually get to an animal list of the records containing the error.

The data quality errors are:

- Green = No Issues, there are no possible data errors in these records!
- Yellow = Warnings, these are of concern and you may want to address
    - Pending Transactions – this is not a data error, you just need to address them
    - Parents Not in ZIMS – this is often not a data error
    - No Parents recorded – this is a data error and will need to be corrected
- Red = Errors
    - Obsolete Taxonomy
        - You can either correct these one by one or by using the Pending Taxonomic Changes (see that section below)
    - Extra Physical or Extra Ownership Transactions
        - These are usually found only in records migrated from ARKS. You either have two acquisitions without a disposition in between or vice versa. Open your My Transactions grid and check the transaction stream. You will need to delete one of the duplicated transactions and Save All Changes to fix this error
    - Gap Between Parent Death and Birth/Hatch
        - This required some detective work. The record that opens in the offspring. Use the hyperlinks in the Parent grid to open the Parent records and compare the offspring Birth/Hatch Date with the Parent Death Date. These gaps can happen if the incorrect Parent was records, the incorrect Birth/Hatch Date was recorded, or the incorrect Parent Death Date was recorded.
    - Parent GANS Identical to each other
        - This means that the same animal has been entered as both the Sire and Dam. This is not always an error because that is what has been recommended to enter when an animal who is a possible Parent is unsexed. Check the Parent record and if it has been sexed since the data was entered it can be removed as a possible Parent for the incorrect sex.
    - Missing Terms
        - This is also caused by migration from ARKS and typically is found in a transaction of Missing because there were no Terms required for Missing in ARKS. Find the blank field by opening My Transactions and record a Term.
    - Unrealistic Dates
        - Finding the unrealistic dates may require some detective work as they are not always obvious. We suggest starting by going to More Details > Event Locations grid and comparing what is recorded there with the rest of the record.
- Blue = Congratulations, you may have the oldest animal of a species in your records
    - Open each record and confirm it is correct. You may have neglected to record a death, or the death date may have been recorded incorrectly. If it is correct, use it for a Public Relations spot!

Incomplete Necropsies

Start > Medical Resources > Global/Local Morbidity and Mortality Analysis > Relevant Death Information Analysis

One of the Tools under Global/Local Morbidity and Mortality Analysis can help you find any records that need to have necropsies finalized. To find all records select to run at the My Institution level, Animalia, select the Accession Types and leave the Death Date range empty. You can filter by taxonomy and date range if you are looking for specific records. When your filter is set select View Graph.

There are three bars displayed in the graph:

- Uninformative RDI Records – These necropsy records provide no useful information. Either there was no necropsy information entered, or the Relevant Death Information was left blank.
- Useful RDI Records – These necropsy records have been successfully completed!
- Conflicting, Suspect or Incomplete RDI Records – These necropsy records are either incomplete are do not make sense. Often the conflicting records have Undetermined entered for RDI along with other specific RDI.

You will need to look at Uninformative RDI Records and Conflicting, Suspect or Incomplete RDI Records. Double click on either the bar name hyperlink or the bar itself. This will drill down to the next graph. Anytime you need to go back use the button in the upper left to take you back to the previous graph. Do NOT use the back arrow as this will take you all the way back to your ZIMS desktop. Continue to drill down the graphs until you get a list of the animals meeting the specific scenario. These lists can be exported to Excel or pdf and sent to the appropriate person with the medical Role access to correct them.

Incomplete Accessions

Start > Animals > Statistic > Incomplete Accessions

Incomplete Accessions can be created in two ways:

- They can be recorded by staff members who do not have the Role access to create Full Accessions. The GAN of these records will end in "-IA".
- They can be from MedARKS migration where they were entered as unaccessioned records. The GAN of these records will end in "-IC".

There are three Actions that can be taken on Incomplete Accessions:

- Archive Selected – This is recommended if you can't confirm that it is an animal that should be made into a Full Accession or one that can actually be deleted from the database. You can make Archived records Active again. The advantage to Archiving is that the record is not cluttering up lists that you may be able to take Actions on but the information is retained for future access in needed.
- Complete Selected – You will be associating this Incomplete record with one or more Full Accessions. See HINT below.
- Remove Selected – The record will be deleted from the database. Before you Remove check the entire record (Notes and Medical included) to confirm that this record should NOT be added to the ZIMS database. Once Removed you will have to use Data Entry Monitoring to get it back.

HINT: You can associate Incomplete Accessions with Full Accessions of different entities by taking the following steps:

- Scenario 1: Single Incomplete Accession needs to be associated with multiple Full Accessions:
    - You need to plan ahead for this one. When you create the first of the multiple Full Accessions DO NOT associate it with the single Incomplete Accession. Instead, create all of the Full Accessions required. Then select the single Incomplete Accession, Complete Selected, and enter all of the Full Accessions when asked what animal you want to associate the Incomplete Accession with.
- Scenario 2: Multiple Incomplete Accessions need to be associated with a single Full Accession:
    - This one is easy. At the time you create the single Full Accession, simply select all appropriate Incomplete Accessions from the list displayed after you Save. If you do not associate at the time of creating the Full Accession, you can select all appropriate Incomplete Accessions from the list, select Complete Selected and choose the single Full Accession.

Pending Taxonomic Changes

Animals > Animal Statistics > Pending Taxonomic Changes

When Species360 marks a taxonomy as Obsolete, you will receive a Post Office message. If you have not kept up with accepting these changes in your Local records, Pending Taxonomic Changes is a quick way to take care of them.

Select the Pending Taxonomic Changes hyperlink and a list of the pending changes appears. Selecting the number in the Animal ID Count column will take you to a list of the records that will be affected by the change, should you choose to accept it. If you want to accept it for all of the records, go back into the animal list, check the left hand box and select Accept Species360 Taxonomy. If you do not want to accept it select Archive, you can go back in later and accept it. If there are only some records that you want to accept the change for you will have to do those record by record, as selecting to accept here will change them all. There is a Batch Action available for Taxonomy Change also.

If you want to automatically accept all Species360 taxonomic changes you can do so in Institution Preferences > Application Preferences > Taxonomy and check the Enable auto-accept for Species360 taxonomic changes. You will never have to think about it again! You will still receive Post Office messages so you will be alerted of the change.

You can also sign up for automatic emails when we change taxonomy by clicking on the ZIMS Taxonomy Change sign up in the scrolling ad box on the ZIMS dashboard. These emails will notify you of any changes of Family to a different Order, change in common name or change in spelling.