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## ZOO KEEPER TRAINING

### [ZIMS Self-Guided Tour!](#)

In the training sessions we covered the topics that you have the Role access to Add and Edit data. There is much more information in ZIMS that your Role also gives you the ability to Search/View data. This self-guided tour of ZIMS can be done in any order. It will give you knowledge of the huge amount of data that you have access to! Use the hyperlinks to jump to the topics.

#### Topics Covered

[Animal Module Dashboard](#)

[Animal Record](#)

[Calendar Module](#)

[Enclosure Module](#)

[Life Support and Components Module](#)

[Institution Module](#)

[Taxonomy Module](#)

[Local Reports and Tools](#)

[Global Reports and Tools](#)

#### ANIMAL MODULE DASHBOARD

Open the Animals module (Start > Animals > Search or desktop icon).

- Your Animal Lists button - Lets you select a list of animals. Helpful for finding animals and doing batch data entry.
- Pending Transaction - By My Institution - Transactions that others have recorded with your institution. Staff at your facility need to address these.
- Pending Transactions - By Other Institution - Transactions that your institution has recorded with other institutions. Staff at the other facility will need to address these.
- Incomplete Accessions - Any Incomplete Accessions that have not yet been made into Full Accessions.
- Incomplete Disposition - Any necropsies recorded in the Medical module prior to a death being recorded in the animal record.
- Pending Taxonomic Changes - Any updates to taxonomy made by Species360 that impact the species in your collection.

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#### ANIMAL RECORD

Open a record for your favorite animal and view the following information.

Details tab:

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- Basic Info - Displays basic information on the animal. Hyperlinks will take you into the species, enclosure or institution record.
- Death Info - This grid is only active for dead animals and lists details regarding the death of the animal.
- Physical Holder History - Lists all the institutions that have ever held the animal.
- Ownership Transaction History - Lists all the institutions that have ever owned the animal.
- Contraception - Lists any active or inactive contraceptions.
- Enclosures - Displays the most recent enclosure the animal is in and any previous enclosures it has occupied.
- External Sharing - Indicates if this record is shared with another institution.
- Identifiers - Displays all the identifiers that have been assigned by your institution and any previous institutions.
- Parent Info - Displays the parents as recorded by your institution or by previous institutions, including the probability that they are the parent.
- Rearing - Tracks the Rearing over time at all holding institutions. You have Add/Edit rights to Rearing
- Census Info - The number of members of a Group, not available in an Individual record.
- Taxonomy / Sex Type / Collection - Displays the Taxonomy and Sex (for Individuals) as recorded by all institutions and the Collections the animal has been recorded in at your institution.
- Alerts - Any alerts created for the animal, often sourced from the Calendar module.
- Images - Pictures of the animal, often helpful for identification.

#### More Details tab:

- Development Milestones - Any significant lifetime milestones the animal has reached.
- Responsible Party - Who is responsible for the management or care of the animal
- Birth/Hatch Date and Event Locations - Displays dates for significant events for the animal.
- Permits - Any permits assigned to the animal
- Life Stages - The current and previous stages of life the animal has moved through.
- Management Plan - Captures if the animal is managed under a cooperative plan.

#### Major Life Event tab:

- A list of major life events sourced from other data entry screens.

#### My Transactions tab:

- A list of any transactions that your institution has had with the animal.

#### Animal Graphing Tool tab (active when Details tab is selected):

- This Tool lets you graph multiple animals and multiple measurements on the same graph. It is a fun Tool to play around with!

#### Animal Charts (Start > Animals > Charts)

- Various charts that display information about the animals at your institution or all ZIMS. This is fun to play with!

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## CALENDAR MODULE

Open the Calendar Module (Start > Institution > My Calendar or desktop icon).

- You have Add/Edit rights to Animal Alerts, Animal Assessment, Animal Enrichment Session, Animal Measurement, Enclosure Alert, Enclosure Treatment Task and Maintenance Task
- You can also search and view for Medical Procedures, Pathology, Sample Collection and Treatment/Prescriptions. All these tasks may be assigned to you as part of your animal care.

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## ENCLOSURE MODULE

Open the Enclosure Module (Start > Enclosure > Enclosure or desktop icon > Tree View) and select an Enclosure.

Details tab:

- Basic Details - Displays some details on the Enclosure and a hyperlink into the Parent Enclosure
- Planned Taxa - Species that are planned for the enclosure.
- Attached Life Support - Shows currently attached Life Supports. Disconnected ones can be found using the Search form.

More Details tab:

- Dimensions - The size of the Enclosure.
- Plants - A record of plants contained in the Enclosure.
- Substrates - The base of the Enclosure.
- Permits - Any permits assigned to the Enclosure, these are most often Injurious Wildlife permits.
- Water Bodies - Any ponds or pools in the Enclosure. You cannot capture water quality measurements on water bodies.
- Responsible Party - The Staff responsible for the upkeep of the Enclosure or the care of the animals within it.
- Furniture - Equipment or accessories that provide shelter, comfort or exercise for the Enclosure occupants.
- Barriers - What is keeping the animal in or the visitors out of the Enclosure.
- Move History - The locations an Enclosure (usually a moveable one) has been.
- Enclosure Status - The status of the Enclosure such as Planned, Under Construction or Completed.

Occupants tab:

- Displays the current occupants of the Enclosure. The search form above the Occupants list can be used to find historical occupants.

Your Animal Lists button:

- Like Animal Lists, this is an easy way to find Enclosures if the lists are organized by area and to perform Batch Actions.

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#### LIFE SUPPORT AND COMPONENT MODULES

Open the Life Support/Component Module (Start > Life Support or as a desktop icon).

- The top buttons let you look at your Life Support Tree which displays the Life Support, the Connected Enclosures and any Connected Components. You can also perform Batch Measurements and find your Life Support or Component Lists here.
- To open a Life Support or Component record you can select it from the Tree or perform a search from the left-hand collapsible search box.
- Basic Detail – Basic information on the Life Support or Component.
- Connected Enclosure List (Life Support only) – Lists the current Enclosure(s) the Life Support is connected to. To find past connections use the search form.
- Connected Component List (Life Support only) – Lists the current Components attached to the Life Support. To find past connections use the search form.
- Notes & Observations – Any text details recorded on the Life Support or Component.
- Maintenance and Water Changes – Any repairs, upkeep or water changes performed on the Life Support or Component.
- Measurement – Measurements recorded on the Life Support or Component. You have Add/Edit rights to record Measurements.

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#### INSTITUTION MODULE

##### **My Institution**

Open the Institution Module (Start > Institution > My Institution or desktop icon > My Institution tab).

- Institution Search – Expandable search with various filters.
- Institution Statistics tab – Quick references for the number of animals and species held, recent births/hatches and other collection information.
- My Institution tab
  - o Institution Profile – Basic information about your institution.
  - o Staff – List of Staff at your institution and their ZIMS Roles.
  - o Husbandry/Administration Roles – A list of Roles and number of Users assigned each Role.
  - o Permits – A list of the permits held by your institution, their Status and the number of assignments they have.
  - o Notes – Notes regarding your institution.
  - o Synonyms – Any synonyms assigned to your institution.
  - o Departments – List of any Departments at your institution.
  - o Teams – List of Teams and their members at your institution.
  - o Species Wanted – A list of Species your institution hopes to acquire with additional information as recorded.

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- o Animals Available – A list of Animals that your institution is hoping to place elsewhere.
- o Transponders – A list of your transponders that a hyperlink into the animal record if they are assigned or in-use.
- Animal Statistics tab (Details tab must be selected) – Charts for animals and species in your collection
- Contact Directory (Details tab must be selected) – Allows you to search for contacts at other facilities if they have been marked as visible or contacts your institution has added locally.
- Measurement Preferences (Details tab must be selected) – Allows your Local Admin to filter many of the data standard measurement lists.

### Institution

Go to Start > Institution

- Institution Preferences – They may or may not be the same as your My Preferences. In addition, there are several Preferences that are available only at the Institutional level.
- Species360 Member Maps – Global charts of Species360 member institutions.
- Data Management – Various charts using your ZIMS data.

### Data Entry Monitoring

Go to Start > Security Tools > Data Entry Monitoring

- This is a list of recently entered data often used by your Local Admin to monitor entries recorded by other Staff members and roll back incorrectly recorded data.

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### TAXONOMY MODULE

Go to Start > Taxonomy > Taxonomy Search or use the desktop icon.

- The Taxonomy Rank Statistics graph shows the number represented in ZIMS data. Hover over the bars for specific counts.
- Use the left-hand search box to find your favorite species
- Basic Info – Displays some basic information about the species.
- Taxonomy Change History – Captures any changes to the Taxonomy over time.
- Citation – Who named the Taxonomy.
- Identifier Location – Common body locations where identifiers can be found.
- Synonym – Names which have the same meaning, often have been superseded and are no longer valid. Your institutions can create local synonyms.
- Characteristic – The range and habitat for the species.
- Studbook Keeper List – Studbook Keeper for the species and the studbook authority.
- Reference – The source references for the taxonomy.
- Hazard Info – Displays if there is a potential threat to humans

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**LOCAL REPORTS AND TOOLS**

The Reports are found under Start > Reports. Activity and Daily Reports were covered in the training. Some other Reports that you may find useful are:

- Enclosure Activity - Find events in an Enclosure during a specified date range.
- Enclosure Occupants Summary - Occupants by species counts in an Enclosure(s) during a specified date range.
- Enclosure Report - A list of occupants for an Enclosure during a date range.
- Global Permit - Find information on Permits at other institutions that are marked as Global scope.
- Inventory Detail - Lists the number of animals by species with a beginning count, any ins and outs, and an ending count. Can include both animals in-on-loan and out-on-loan.
- Inventory Summary - A count of animals either physically held at your institution or owned by your institution. The physical and ownership status cannot be run together.
- Loan - Report finds animals either in-on-loan or out-on-loan.
- Note Retrieval - Report finds keywords, text strings and Note Types recorded for Taxonomy or Animals.
- Peak Holding - Calculates the highest number of animals held by species during a date range. This report is often run for USDA license submissions.
- Species Event History - Visualization of births and transfers by species over time by selected scope. This is great fun to play with!
- Specimen - Report for an individual or group record. Can be run for multiple records.
- Taxon - Report for a single taxon, often including the taxonomy below the specified taxon. Can be run at the Local or Global level.
- Transaction - Acquisitions and Dispositions, including births/hatches and deaths, over a specified date range. You can also select transactions with specific institutions.
- Wild Acquisitions - Finds individuals/groups collected from the wild over a specified date range.

The Tools are found under Start > Tools.

- Pedigree Explorer - Display of an animal's Parents, Descendants and Siblings.
- Group Explorer - Visual display of the ins and out and censuses of a group record.
- Manage Templates - access to the various templates available:
  - Aquarist Daily Log
  - Husbandry Log
  - Animal Measurements
  - Enclosure/Life Support/Component Measurements
- Manage Note Template - View access of the Note Templates created.
- Taxonomic Inconsistency - Discover taxonomic inconsistencies in an animal's ancestors.
- Measurement Range Template - View access to desired measurement ranges and enclosures assigned these ranges.

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- Environmental Quality Graph – Allows for comparison of multiple enclosures/life/components and various measurements
- Animal Graphing Tool – Allows for comparison of multiple animals and various measurement types.

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## GLOBAL REPORTS AND TOOLS

The Global Resources are found under Start > Global Resources

### Animal Management/Husbandry

- Species Holding – Current physical location of species held in Species360 member institutions by region.
- Age Distribution – A graphical display of the current numbers of animals in each age group by sex.
- Weight Comparison – A graph of the weight of a single animal, a single animal compared to weights in the global database of the same taxonomy, or just the weights of a particular taxonomy across the global database.
- TAG Export – Current physical holding of Species360 members and their IUCN status. Includes natural geographic range of the species and location of the institution.
- Population Overview – One screen per taxa overview of the state of the animal population in Species360 member institutions over the last 20 years.

### Medical Resources

- Anesthesia Summaries – The most commonly used injectable anesthetic drugs and combinations by species.
- Drug Usage Extracts – A summary of drug and vaccine usage information by species.
- Test Results
  - o Search by Test – Returns test date results for animal with any Health Status.
  - o Expected Test Results – Returns data only from animals with a normal Health status when results number 15 or more.
- Morbidity and Mortality Analysis – Can find the most common clinical issues, relevant death information and search by diagnosis (local animal only).

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