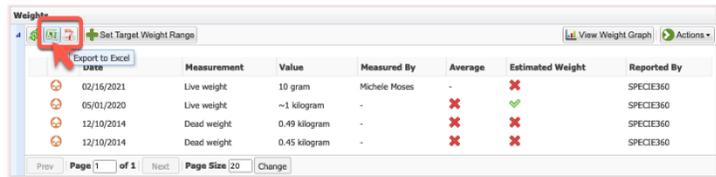


## REPORTS IN ZIMS HUSBANDRY

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

The list of Husbandry Reports that are available to you are found under the Start button > Reports. Report access is granted by your ZIMS role, if you are looking for a report that is mentioned here, but you do not see it in ZIMS, contact your local administrator for help. Reports are also available via exporting data to PDF and Excel throughout ZIMS.



	Measurement	Value	Measured By	Average	Estimated Weight	Reported By
02/16/2021	Live weight	10 gram	Michele Moses	-	✗	SPECIE360
05/01/2020	Live weight	~1 kilogram	-	✗	✓	SPECIE360
12/10/2014	Dead weight	0.49 kilogram	-	✗	✗	SPECIE360
12/10/2014	Dead weight	0.45 kilogram	-	✗	✗	SPECIE360

**It is important to note that recently entered data may not appear on reports or exports for 180 seconds after the data was entered.** This is because reports and exports in ZIMS are run from a different server than the data is collected on. This assures that requests for large amounts of data being run will not slow down ZIMS for data entry needs.

For help on which report to run for your inventory/permitting needs, see this guide: [Help with Inventories and Reporting.](#)

For details on how ZIMS Reports filters institutions by country/continent, see this list: [ZIMS Institutions – countries and continents.](#)

The server from which ZIMS reports are served is different from the ZIMS application server. If you are unable to run reports, please have your IT staff add the following to your whitelist: IP=50.31.180.180 & IP=50.31.180.181 | URL's= <https://zimsapp3.Species360.org> & <https://zimsapp4.Species360.org>

## Topics Covered

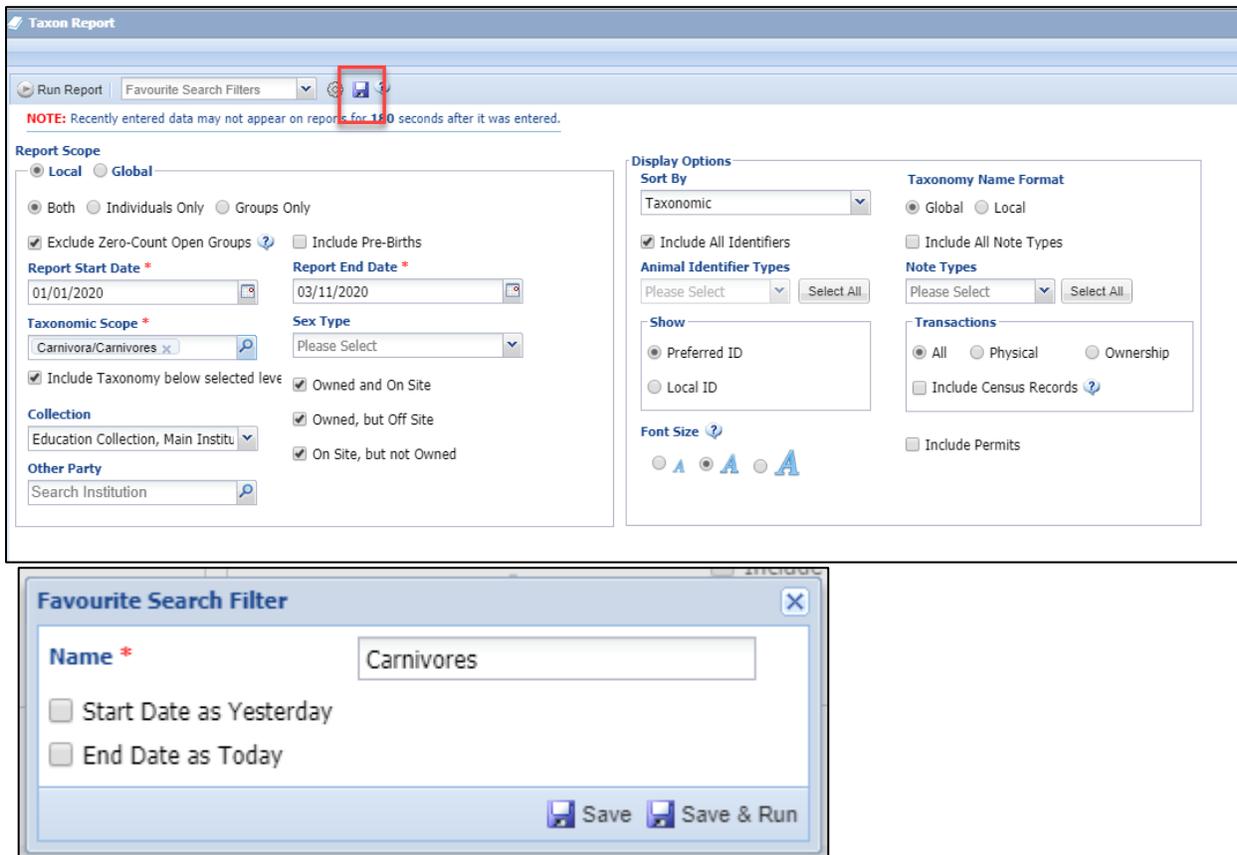
[Favourite Report Filters](#)  
[Exporting Reports](#)  
[Exporting Options for Reports](#)  
[Troubleshooting export to Rich Text Format \(RTF\)](#)  
[Activity Report](#)  
[Daily Report](#)  
[Enclosure Activity Report](#)  
[Enclosure Occupants Summary Report](#)  
[Enclosure Report](#)  
[Enrichment Sessions Report](#)  
[Global Permit Report](#)  
[Exports](#)  
[i-FAP](#)  
[SAFE for Chondrichthyes Census](#)

[Inventory Detail Report](#)  
[Using the Report](#)  
[Impact on Report of Group Census Versus Group Partial Transactions](#)  
[Inventory Summary Report](#)  
[Multi Facility Inventory report](#)  
[Loan Report](#)  
[Note Retrieval Report](#)  
[Peak Holding Report](#)  
[Species Event History](#)  
[Specimen Report](#)  
[Taxon Report](#)  
[Transaction Report](#)  
[Wild Acquisitions Report](#)  
[Medical Reports](#)

## Favourite Report Filters

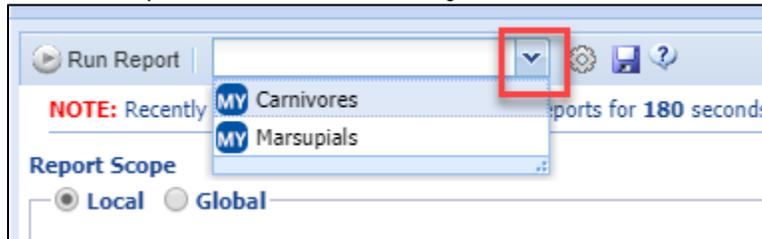
Saving report filters into your favourites list in ZIMS helps you to save time and helps avoid errors in selecting your report filters for commonly used Reports. Almost all the Reports in ZIMS have the option to set Favourite Filters.

To save a filter open the report and complete your desired filters for the report. Below is a Taxon Report screen. We are creating a filter to be used as our default for running Taxon Reports for our carnivores. All mandatory fields must be completed. All fields will be editable when you actually use the filter. When done, select the Save icon at the top.

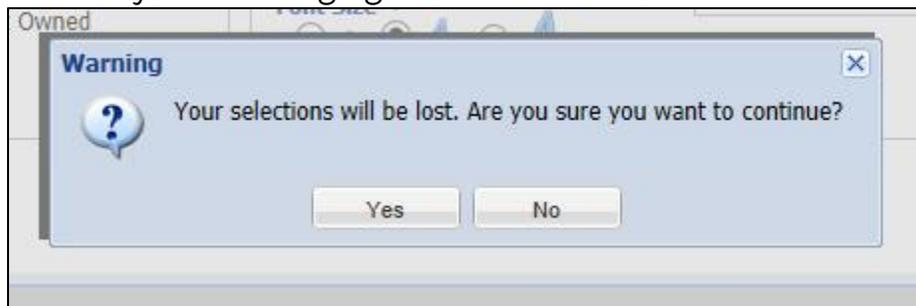


1. Name - must be unique within each report
  2. Start Date as Yesterday - checking this will make the Start Date of your report Yesterday. This date will update daily.
  3. End Date as Yesterday - checking this will make the End Date of your report today. This date will update daily.
  4. Save - This will Save the filter to your Favourites.
  5. Save & Run - This will Save your filter to your Favourites and also immediately run the report.
- Some saved filters have the option to share the filter with others.

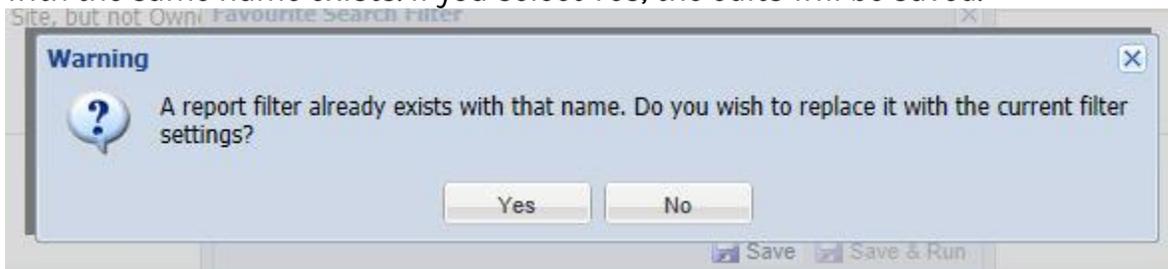
To find your Favourite Filters, use the drop down arrow to the right of "Favourite Report Filters" box. Then select the appropriate filter name. All fields are editable and if changed to run the report it will not affect your saved filter.



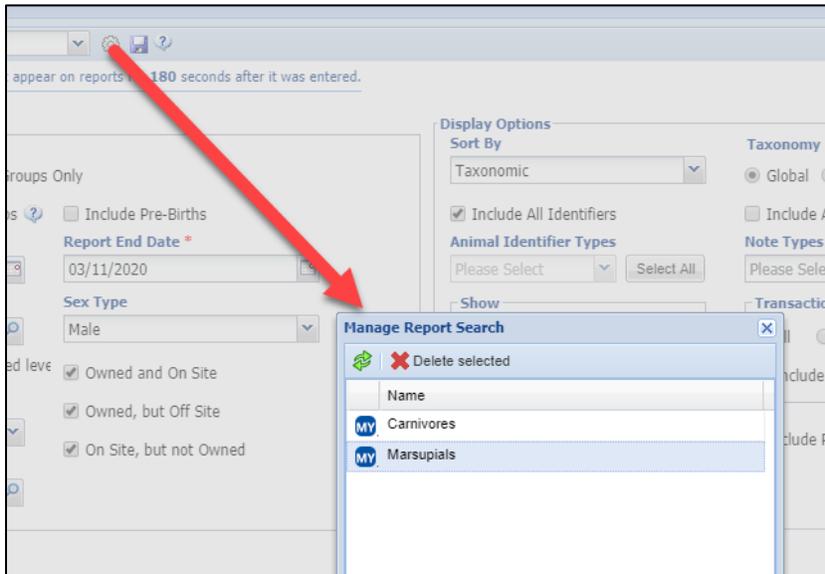
If you change filters you will be given the message below that your selections will be lost. This only means that you will be changing the selected report filters as seen on the screen because you are changing to a different saved filter.



To edit a saved filter simply open it up and make your changes. Select to Save it and name it as it was before (if you want to keep the edits) or record a new name (if you want to keep both filters saved). If you keep the old name you will receive the message below that a filter with the same name exists. If you select Yes, the edits will be saved.



To delete a saved filter, select the Manage Report Filter icon, highlight the desired filter and select Delete Selected.



[Back to Topics Covered](#)

## Exporting Reports

### Exporting Options for Reports

All of the Reports have options for exporting though these options are not all the same. The following Reports can be exported to Raw Excel directly from the report filters screen:

- Activity Report
- Enclosure Occupants Summary Report
- Enclosure Report
- Global Permit Report
- Inventory Summary Report
- Inventory Detail Report

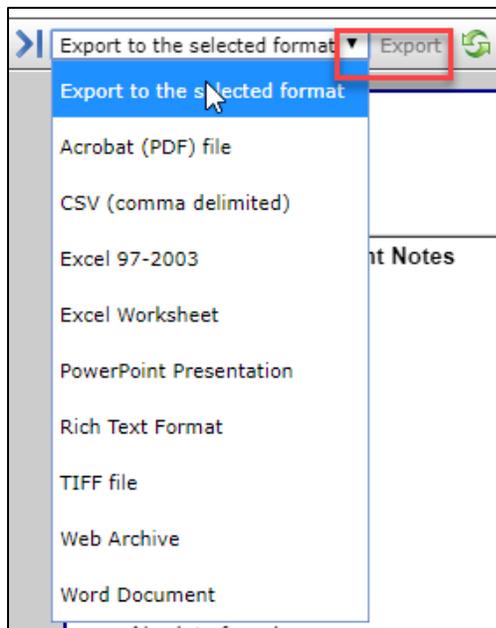
Inventory Detail Report, Raw Excel output, has a series of column headers with coded terms. Here's a list of the coded column headers and their definitions:

- treesort3: helps sort the list taxonomically
- OosTolol\_M: Owned on site changed to In on loan (male)
- OosTolol\_F: Owned on site changed to In on loan (female)
- OosTolol\_O: Owned on site changed to In on loan (other)
- OosToOol\_M: Owned on site changed to Out on loan (male)
- OosToOol\_F: Owned on site changed to Out on loan (female)
- OosToOol\_O: Owned on site changed to Out on loan (other)
- lolToOos\_M: In on loan changed to Owned on site (male)
- lolToOos\_F: In on loan changed to Owned on site (female)
- lolToOos\_O: In on loan changed to Owned on site (other)
- OolToOos\_M: Out on loan changed to Owned on site (male)

- OolToOos\_F: Out on loan changed to Owned on site (female)
- OolToOos\_O: Out on loan changed to Owned on site (other)
- OosTolol\_M: Owned on site changed to Out on loan (males)
- OosTolol\_F: Owned on site changed to In on loan (females)
- OosTolol\_O: Owned on site changed to In on loan (other)
- OosToOol\_M: Owned on site changed to Out on loan (males)
- OosToOol\_F: Owned on site changed to Out on loan (females)
- OosToOol\_O: Owned on site changed to Out on loan (other)

**Additional exports:**

Some Reports can be exported to various formats after the Report has been run by selecting the format desired and then Export. The Export option will not activate until you select a format.



**These Reports are:**

- Activity Report
- Daily Report
- Enclosure Activity Report
- Enclosure Occupants Summary Report
- Enclosure Report
- Global Permit Report
- Inventory Detail Report
- Inventory Summary Report
- Loan Report
- Note Retrieval Report
- Specimen Report
- Wild Acquisitions Report

Some Reports can only be exported to Excel or PDF. These Reports are:

- Peak Holding Report
- Taxon Report
- Transaction Report

You can print most Reports directly by selecting the printer icon at the top.

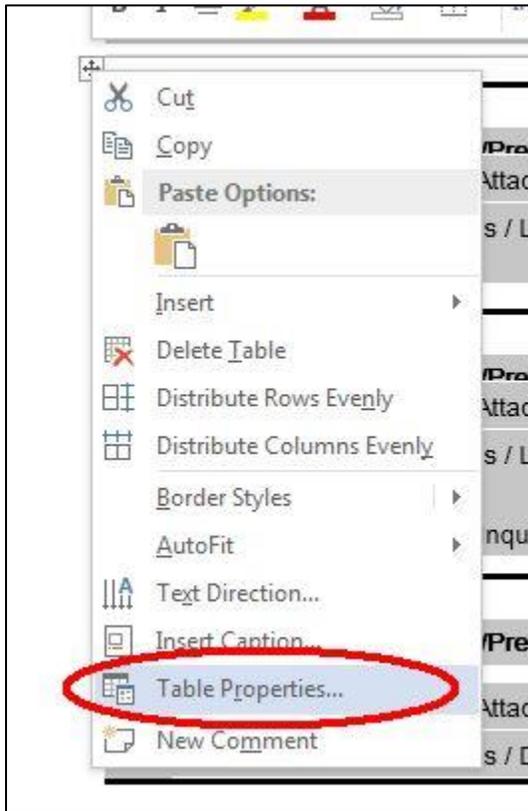
**Troubleshooting export to Rich Text Format (RTF)**

Sometimes, when exporting a ZIMS report to Rich Text Format, you may find that it appears some text has been cut off or "lost":

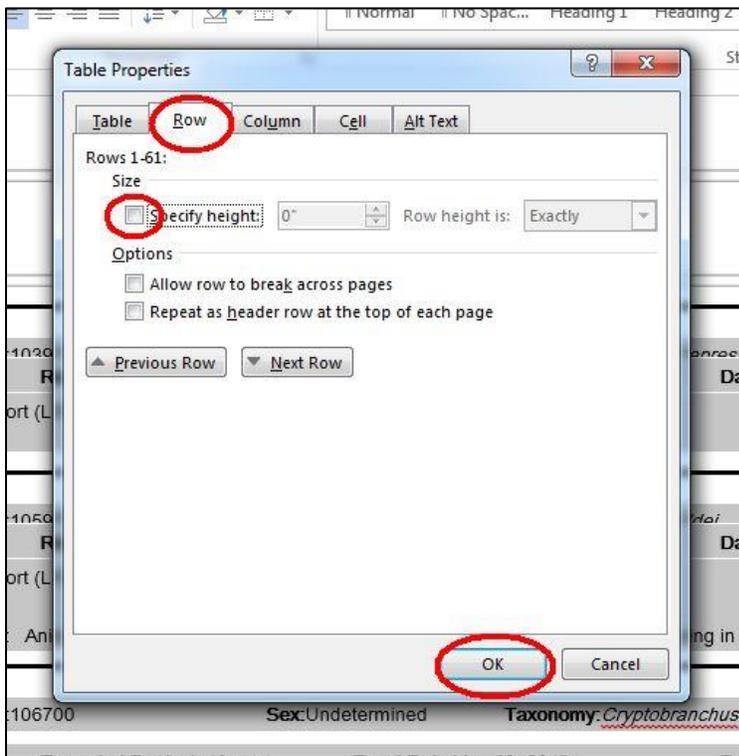
Start Date	Activity Report				End Date
May 22, 2013					May 23, 2013
<b>GAN:242552555</b>	<b>Local/Preferred ID:</b> 103045	<b>Sex:</b> Female	<b>Taxonomy:</b> <i>Rhithalia danreseinmi</i>	Anna	
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Jan 08, 2013	<b>Date Recorded:</b> May 23, 2013	
<b>Details:</b>	Transactions / Loan Report (LR):				
<b>GAN:15313636136</b>	<b>Local/Preferred ID:</b> 105058	<b>Sex:</b> Indetermined	<b>Taxonomy:</b> <i>Vinora raddai</i>	Armenian viner	
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Mar 01, 2013	<b>Date Recorded:</b> May 22, 2013	
<b>Details:</b>	Transactions / Loan Report (LR):				
2012 Loan Inquiry Reply: Animal is alive and well and in a breeding situation, but did not produce offspring in the past year. No breeding activity has					
<b>GAN:61363613636</b>	<b>Local/Preferred ID:</b> 106700	<b>Sex:</b> Undetermined	<b>Taxonomy:</b> <i>Cryptobranchus alleganiensis</i>	Eastern hellbender	
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> May 09, 2013	<b>Date Recorded:</b> May 22, 2013	

This is caused by limitations of the word-processing software, but is easily fixed. Click anywhere in the report itself (below the header, in the actual report.) You will see a small "+" icon appear in the top left:

Start Date	Activity Report				End Date
May 22, 2013					May 23, 2013
<b>GAN:242552555</b>	<b>Local/Preferred ID:</b> 103045	<b>Sex:</b> Female	<b>Taxonomy:</b> <i>Rhithalia danreseinmi</i>	Anna	
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Jan 08, 2013	<b>Date Recorded:</b> May 23, 2013	
<b>Details:</b>	Transactions / Loan Report (LR):				
<b>GAN:15313636136</b>	<b>Local/Preferred ID:</b> 105058	<b>Sex:</b> Indetermined	<b>Taxonomy:</b> <i>Vinora raddai</i>	Armenian viner	
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Mar 01, 2013	<b>Date Recorded:</b> May 22, 2013	
<b>Details:</b>	Transactions / Loan Report (LR):				



Right-click on that icon, and choose "Table Properties" from the drop-down menu.



On the "row" tab, be sure there is nothing - not a check mark, not a "filled in" square, nothing - in the "specify height" check box. Then click "OK":

You will see that previously-hidden parts of the report are now visible!

Start Date May 22, 2013	<h2>Activity Report</h2>	End Date May 23, 2013
----------------------------	--------------------------	--------------------------

---

GAN:242552555	Local/Preferred ID:103945	Sex:Female	Taxonomy: <i>Bubalus depressicornis</i>	Anoa
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Jan 08, 2013	<b>Date Recorded:</b> May 23, 2013
<b>Details:</b>	Transactions / Loan Report (LR):			
2012 Loan Inquiry Reply: Animal is alive and well and in a breeding situation, and produced one offspring born 1/7/2013. No health issues reported.				

---

GAN:15313636136	Local/Preferred ID:105958	Sex:Undetermined	Taxonomy: <i>Vipera raddei</i>	Armenian viper
<b>Event:</b>	Notes and Attachment	<b>Recorded By:</b> Kevin Keeper	<b>Event Date:</b> Mar 01, 2013	<b>Date Recorded:</b> May 22, 2013
<b>Details:</b>	Transactions / Loan Report (LR):			
2012 Loan Inquiry Reply: Animal is alive and well and in a breeding situation, but did not produce offspring in the past year. No breeding activity has been witnessed. No health problems reported.				

[Back to Topics Covered](#)

### Activity Report

This Report captures animal data reported over a specified time frame.

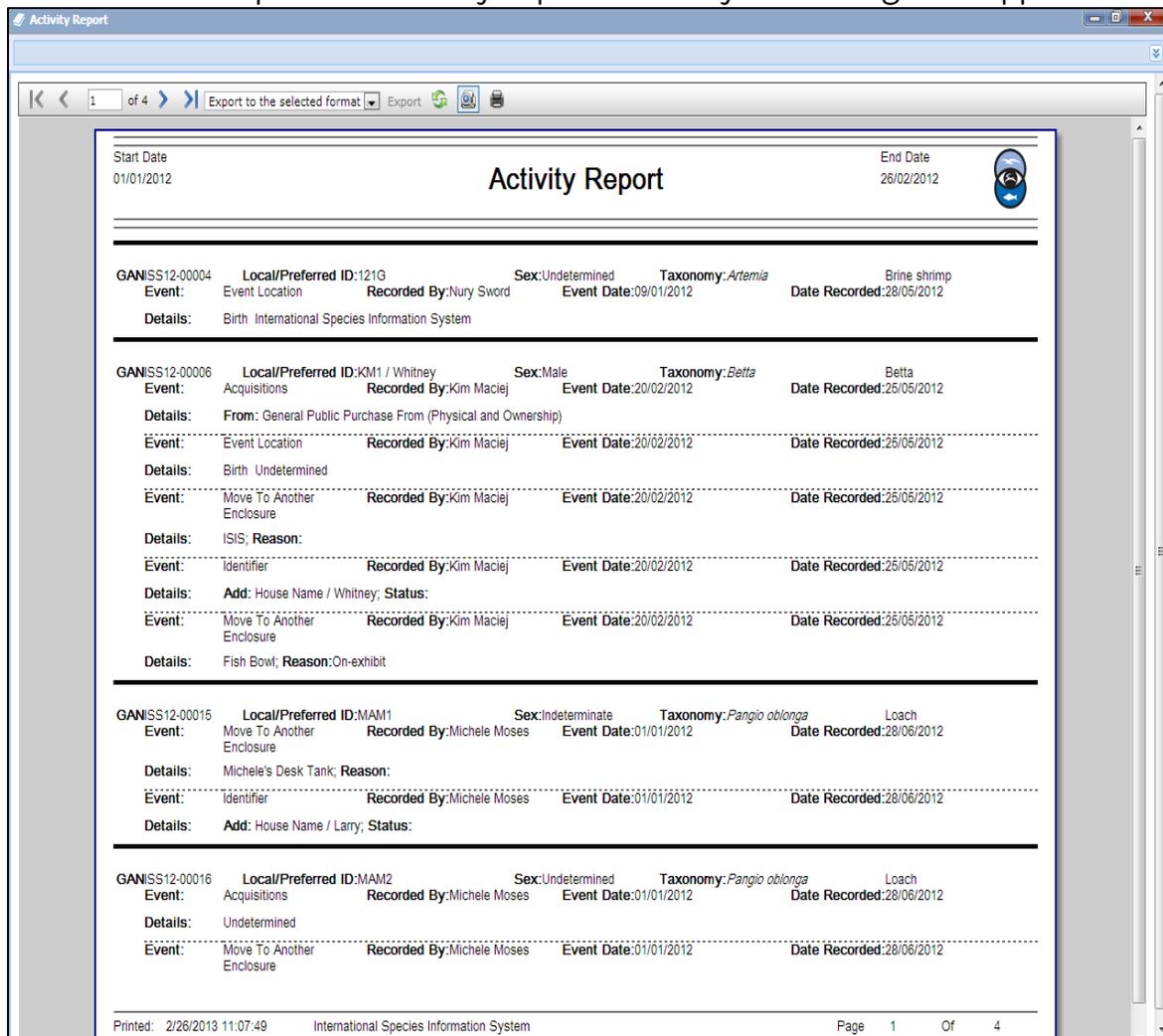
The screenshot shows a web-based configuration interface for generating an Activity Report. It includes a toolbar with 'Run Report', 'Export For Raw Excel', and 'Favourite Search Filters'. A note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' The interface is divided into several sections:

- Report Start Date \***: Oct 18, 2019 (Callout 1)
- Report End Date \***: Oct 25, 2019 (Callout 2)
- Date Range Filter**: Event Date (Callout 3)
- Event Type**: Please Select (Callout 4)
- Entered By**: Please Select (Callout 5)
- Print Type**: A4 (Callout 6)
- Taxonomic Scope**: Filter By Taxonomy (Callout 7)
- Enclosure**: Search For Enclosure (Callout 8)
- Group By**: GAN (Callout 9)
- Include Taxonomy below selected level**: Unchecked (Callout 10)
- Include Enclosures Below**: Unchecked (Callout 11)
- Include Provisional Data**: Unchecked (Callout 12)
- Show Only Provisional Data**: Unchecked (Callout 13)

1. Enter the date range for the report
2. You can select to run the report for when the event occurred, when it was recorded, or both.  
If you want to narrow activities by either the day the event was recorded or occurred, you should pay close attention to the Date Range Filter settings.

3. This is a multiple select list for the type of event you want to include
4. You can filter the report by who entered the data
5. You can filter by taxonomy
6. You can filter by enclosure
7. Select how you want the report grouped
8. You have the option to include Provisional data or run the report only for Provisional data

Below is an example of an Activity Report sorted by GAN. Navigation appears on the top bar.



**Activity Report**

Start Date: 01/01/2012 | End Date: 26/02/2012

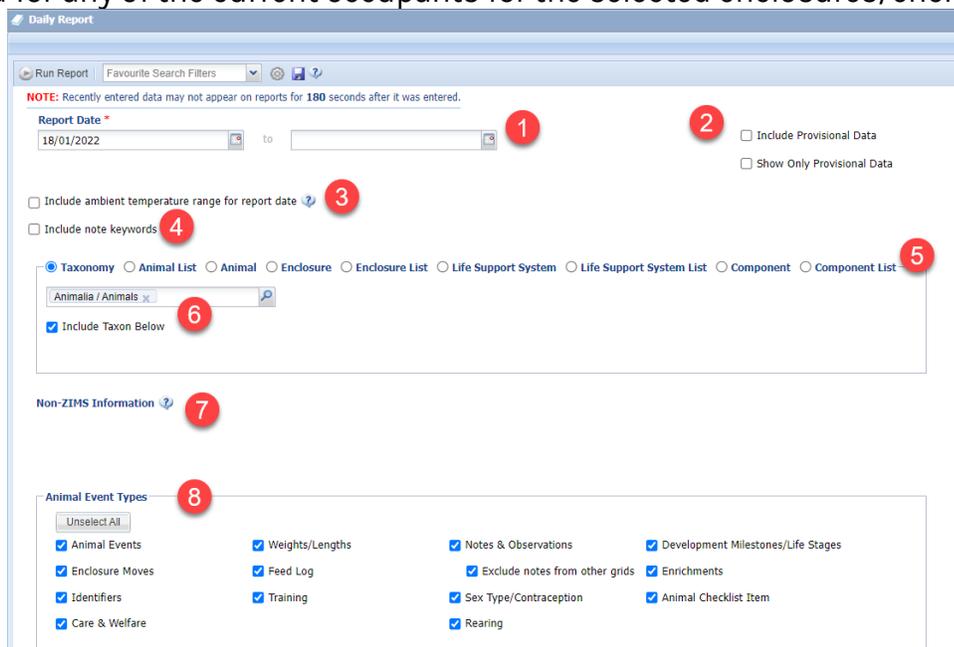
GAN	Local/Preferred ID	Sex	Taxonomy	Event	Recorded By	Event Date	Date Recorded
GANSS12-00004	121G	Undetermined	Artemia	Brine shrimp	Nury Sword	09/01/2012	28/05/2012
<b>Details:</b> Birth; International Species Information System							
GANSS12-00006	KM1 / Whitney	Male	Betta	Betta	Kim Maciej	20/02/2012	25/05/2012
<b>Details:</b> From: General Public Purchase From (Physical and Ownership)							
Event:	Event Location	Recorded By:	Event Date:	Date Recorded:			
Event:	Birth	Kim Maciej	20/02/2012	25/05/2012			
<b>Details:</b> Birth; Undetermined							
Event:	Move To Another Enclosure	Recorded By:	Event Date:	Date Recorded:			
Event:	Move To Another Enclosure	Kim Maciej	20/02/2012	25/05/2012			
<b>Details:</b> ISIS; Reason:							
Event:	Identifier	Recorded By:	Event Date:	Date Recorded:			
Event:	Identifier	Kim Maciej	20/02/2012	25/05/2012			
<b>Details:</b> Add: House Name / Whitney; Status:							
Event:	Move To Another Enclosure	Recorded By:	Event Date:	Date Recorded:			
Event:	Move To Another Enclosure	Kim Maciej	20/02/2012	25/05/2012			
<b>Details:</b> Fish Bowl; Reason:On-exhibit							
GANSS12-00016	MAM1	Indeterminate	Pangio oblonga	Loach	Michele Moses	01/01/2012	28/06/2012
<b>Details:</b> Michele's Desk Tank; Reason:							
Event:	Identifier	Recorded By:	Event Date:	Date Recorded:			
Event:	Identifier	Michele Moses	01/01/2012	28/06/2012			
<b>Details:</b> Add: House Name / Larry; Status:							
GANSS12-00016	MAM2	Undetermined	Pangio oblonga	Loach	Michele Moses	01/01/2012	28/06/2012
<b>Details:</b> Undetermined							
Event:	Move To Another Enclosure	Recorded By:	Event Date:	Date Recorded:			
Event:	Move To Another Enclosure	Michele Moses	01/01/2012	28/06/2012			

Printed: 2/26/2013 11:07:49 | International Species Information System | Page 1 Of 4

## Daily Report

This Report was designed to quickly provide a report for a day's happenings across your facility. This report is often used by Keepers/Aquarists to review what happened in their area the previous day or the days when they were off. It is equally useful for many other Staff members such as Curators and Department Heads.

Depending on the filters selected, this Report can include data on Enclosures, Life Supports and Components as well as Animals. When run for Enclosure's the 'animal data' is presented for any of the current occupants for the selected enclosures/enclosure list.



The screenshot shows the 'Daily Report' 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.' Below this, there is a 'Report Date' field with a date range selector (18/01/2022 to [empty]). To the right of the date field are two checkboxes: 'Include Provisional Data' and 'Show Only Provisional Data'. Below the date field are three checkboxes: 'Include ambient temperature range for report date', 'Include note keywords', and 'Include Taxon Below'. There is a radio button group for 'Taxonomy', 'Animal List', 'Animal', 'Enclosure', 'Enclosure List', 'Life Support System', 'Life Support System List', 'Component', and 'Component List'. A search box contains 'Animalia / Animals'. Below the search box is a 'Non-ZIMS Information' section. At the bottom, there is an 'Animal Event Types' section with a grid of checkboxes for various event types: Animal Events, Enclosure Moves, Identifiers, Care & Welfare, Weights/Lengths, Feed Log, Training, Notes & Observations, Exclude notes from other grids, Sex Type/Contraception, Rearing, Development Milestones/Life Stages, Enrichments, and Animal Checklist Item.

1. Although the Daily Report is usually a report for a single day you can select a Date Range for the report. This Date Range is limited to a month maximum.
2. You can select to include Provisional Data or to show only Provisional Data in the report. This option will only display if you have Provisional data turned on for your institution.
3. You can include the ambient temperature range for the report date. This information is sourced from measurements recorded in your top-level enclosure (your institution).
4. You can include Note and Observation keywords.
5. The report can be filtered by specific Taxonomy, Animals, Enclosures, Life Supports and Components. What makes it especially useful is that it can be filtered using Lists, so the report can be run by Teams or Keeper strings. The lists drop down will not provide any options if you [do not have lists created yet](#).
6. What entity you select above will drive your options to select/record in this box.

7. The non-ZIMS Information box allows you to capture information that is not recorded elsewhere in ZIMS. This can include things like extreme weather conditions, non-normal staffing and reminders for the following day such as needing to restock items.
8. We selected Taxonomy = Animalia so the Animal Event Types display. All Event Types are checked by default but you can uncheck events that you do not want to include. Note you can now include Care and Welfare information into your daily report, and choose to exclude notes from other grids (e.g. training, enrichment, identifier notes) when selecting Notes & Observations.

Below when we select an entity of Enclosure or Enclosure List. This selection activated the Enclosure Event Types.

Notice, you can now report on Animal, Enclosure, Life Support or Component Checklist Items (1) added from [Husbandry Log Entries](#) in the Daily Report, [Care and Welfare](#) information (2), and choose to exclude notes from other grids when viewing Notes and Observations (3).

**Daily Report**

Run Report Favourite Search Filters

**NOTE:** Recently entered data may not appear on reports for 180 seconds after it was entered.

Report Date: 18/01/2022 to [ ]

Include Provisional Data  
 Show Only Provisional Data

Include ambient temperature range for report date  
 Include note keywords

Taxonomy  Animal List  Animal  Enclosure  Enclosure List  Life Support System  Life Support System List  Component  Component List

Search For Enclosure [ ]

Include Enclosures Below

**Non-ZIMS Information**

**Animal Event Types**

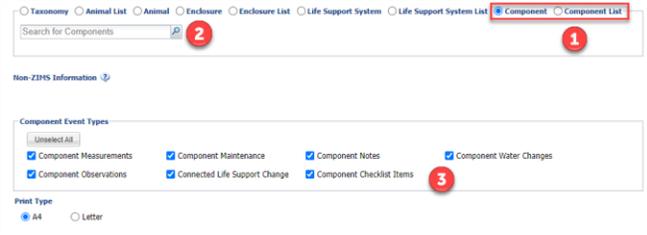
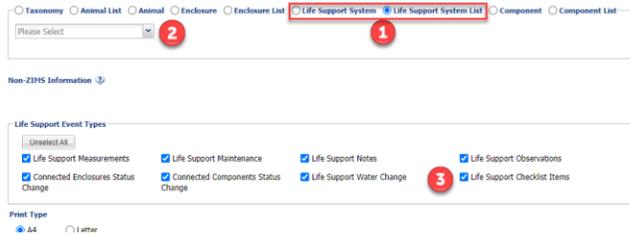
Animal Events  Weights/Lengths  Notes & Observations  Development Milestones/Life Stages  
 Enclosure Moves  Feed Log  Exclude notes from other grids  Enrichments  
 Identifiers  Training  Sex Type/Contraception  Animal Checklist Item  
 Care & Welfare  Rearing

**Enclosure Event Types**

Environmental Measurements  Enclosure Maintenance  Enclosure Treatment Records  Enclosure Feed Log  
 Enclosure Water Changes  Enclosure Notes  Enclosure Observations  Enclosure Checklist Items

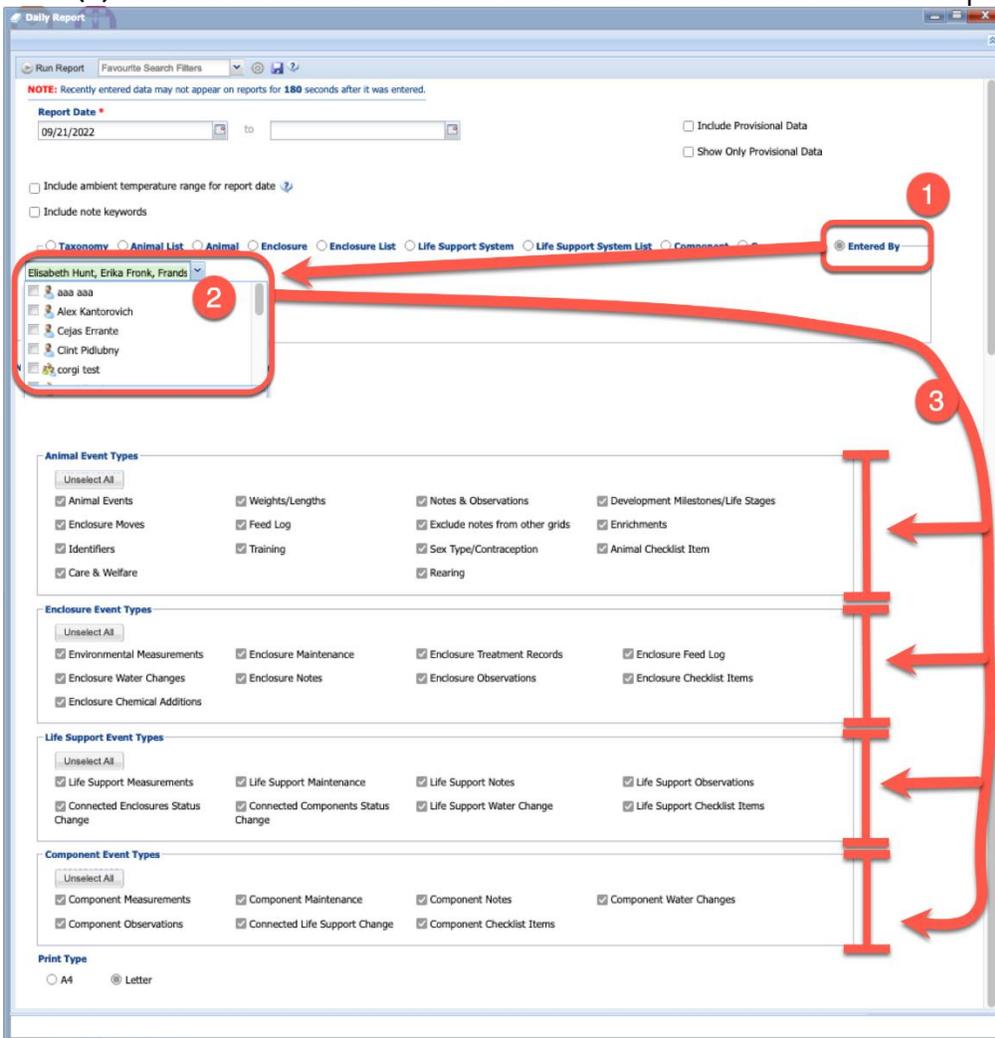
Print Type  
 A4  Letter

If you want to search for all Life Support or Component Check List Items for a given date range:



1. Check the box for that entity type
2. Leave the Search Box blank
3. Enable Checklist Items

You can run the Daily Report by 'Entered By' - this allows you to select the individual(s)/ team(s) of users as the data enterers that will be included in the report output:



1. When filtering by "entered by"

2. You will select from the drop-down individual(s) and/or team(s) who completed data entry
3. Given you are searching by the person(s) who completed the data entry, and not the ‘entity type’, you are able to produce the daily report with any/all of the entity types included.

Example report of checklist items, entered from Husbandry Log Template:

Report Start Date  
Apr 01, 2021

**Daily Report**

Enclosure List: Checklist Daily Report

Report End Date  
May 01, 2021



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---

**Water Change**  
No data found

---

**Enclosure Checklist Items**

**Apr 01, 2021**

Checklist Item	Response	Category / Type: Terrestrial / Building
Gombe Interpretive Center All Inverts housed here are normal	Yes	Responsible Party: Species360 Member Support Recorded By: Species360 Member Support
Invert Holding - Ed AH4 All Inverts housed here are normal	Yes	Responsible Party: Species360 Member Support Recorded By: Species360 Member Support
South America Interpretive Center All Inverts housed here are normal	Yes	Responsible Party: Species360 Member Support Recorded By: Species360 Member Support

---

**Apr 08, 2021**

Daily Check list

Feed Logs

Notes

Date *	Time *	By *	All Inverts ho...	All Inverts ho...	All Inverts ho...
-- Latest Added Records					
Apr 08, 2021	13:15	Species360 M...	Yes	Yes	Yes
Apr 15, 2021	13:16	Species360 M...	Yes		Yes
Apr 22, 2021	13:17	Species360 M...	No	No	No
May 01, 2021	13:14	Species360 M...	Yes		Yes
May 11, 2021	13:15	Species360 M...	No	No	No

---

**Apr 15, 2021**

Checklist Item	Response	Category / Type: Terrestrial / Room
South America Interpretive Center All Inverts housed here are normal	Yes	Responsible Party: Species360 Member Support Recorded By: Species360 Member Support

Below is an example of how Care and Welfare information is displayed in the Daily Report:

Report Start Date: 01/11/2021      **Daily Report**      Report End Date: 25/11/2021  
 Animalia / Animals and below

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**Care & Welfare**

01/11/2021

12345	Quagga (extinct 1872) / <i>Equus quagga quagga</i>	ZRS21-14267	Individual   Female
			Enclosure: 123
Indicator	Value	Notes	Observed By
00:00 Parenting/rearing behavior	3	Dam very attentive, displaying a lot of guarding behaviours towards the rest of the herd.	Species360 Member Support
Scale: 1 - 3		Value: Very attentive	

02/11/2021

12345	Quagga (extinct 1872) / <i>Equus quagga quagga</i>	ZRS21-14267	Individual   Female
			Enclosure: 123
Indicator	Value	Notes	Observed By
00:00 Parenting/rearing behavior	3	Quagga parental behaviour	Species360 Member Support
Scale: 1 - 3			

03/11/2021

12345	Quagga (extinct 1872) / <i>Equus quagga quagga</i>	ZRS21-14267	Individual   Female
			Enclosure: 123
Indicator	Value	Notes	Observed By
00:00 Parenting/rearing behavior	2		Species360 Member Support
Scale: 1 - 3			

**Quagga parental behaviour**

Date of Observation: 1/11/2021      Observation Time: 00:00

Animal	Behavior	Notes
12345	3 - Very attentive	Dam very attentive

Below you will find an example report highlighting the other layout options for consideration.

Report Date: Jan 01, 2016      **Daily Report**      Animalia / Animals

Ambient Temperature 30 degree fahrenheit - 56 degree fahrenheit      © 2015 International Species Information System

**Animal Events / Event Notes**

GRN12	American toad / <i>Anaxyrus americanus</i>	Group of Animals   0.0.20
		Enclosure: GREENVISC
Event   Note Type / Sub Type	Notes	Responsible Party      Recorded By
From Another Institution	-	

**Enclosure Moves**

GRN12	American toad / <i>Anaxyrus americanus</i>	Group of Animals   0.0.20			
		Enclosure: GREENVISC			
Enclosure	Reason	Action	Notes	Responsible Party	Recorded By
GREENVISC	Acquisition Event	Move In	-		

**Identifiers**

GRN12	American toad / <i>Anaxyrus americanus</i>	Group of Animals   0.0.20			
		Enclosure: GREENVISC			
Type	Identifier	Location	Notes	Implemented By	Recorded By
Local ID	GRN12		-		

XCA018	Northwest Bornean orangutan / <i>Pongo pygmaeus pygmaeus</i>	Individual   Male			
		Enclosure: Orangutans			
Mia	Tattoo: 12345 [Ear/Right], Transponder: 00-0627-F084				
Type	Identifier	Location	Notes	Implemented By	Recorded By
Tattoo	12345	Ear / Right	-	Adrienne Miller	

**Weights / Lengths**

980347	Aldabra tortoise / <i>Aldabrachelone gigantea</i>	Individual   Male				
		Enclosure: GREENVISC				
BUBBA	Type	Value	UOM	Notes	Measured By	Recorded By
*	Live weight	200	kilogram	-		

M11003	Prevost's squirrel / <i>Reithrodontomys prevostii</i>	Individual   Male			
		Enclosure: Squirrel/ Pheasant			
JACK	Transponder: 981020001606319				
Type	Value	UOM	Notes	Measured By	Recorded By
Live weight	~542	gram	-		

XCA019	Northwest Bornean orangutan / <i>Pongo pygmaeus pygmaeus</i>	Individual   Female			
		Enclosure: Orangutans			
Chelsea	Transponder:				
Type	Value	UOM	Notes	Measured By	Recorded By
Live weight	~58.18	kilogram	-		

**Non-ZIMS Information**

Entered by: Adrienne Miller, Jan 01, 2016  
 Data entered in this Non-ZIMS Information field has not been saved in ZIMS and cannot be retrieved at a later date.

Sally was sick so Fred from Birds filled in for her today

The report output is sorted by topics such as Animal Events, Enclosure Moves, Identifiers and Weights and Lengths for ease of locating specific information recorded for a single day.

The temperature displays at the top and any Non-ZIMS Information at the bottom.

Any data that remains Provisional will display with an “\*” next to the row.

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### Enclosure Activity Report

An Enclosure Activity Report lets you find the activity carried out on your Enclosures/Tanks during a specified date range.

The screenshot shows the 'Enclosure Activity Report' 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.' Below this, there are several sections:
 

- Report Start Date \***: A date input field showing 'May 06, 2019' (callout 1).
- Report End Date \***: A date input field showing 'May 13, 2019' (callout 1).
- Event Type**: A dropdown menu with 'Please Select' and a 'Select All' button (callout 2).
- Responsible Party**: A dropdown menu with 'Please Select' (callout 3).
- Print Type**: Radio buttons for 'A4' (selected) and 'Letter'.
- Enclosure/Enclosure List**: Radio buttons for 'Enclosure' (selected) and 'Enclosure List' (callout 4).
- Search For Enclosure**: A search input field with a magnifying glass icon.
- Include Enclosures Below**: A checkbox (unchecked).
- Group By**: A dropdown menu with 'Enclosure' selected (callout 5).
- Include provisional data**: A checkbox (unchecked) (callout 6).
- Show only provisional data**: A checkbox (unchecked) (callout 6).

1. Enter your desired date range.
2. Select what Event Types you wish to include. This is a multiple select dropdown for events such as measurements, maintenance, feed logs, animal moves and notes. If you want to include all Event Types use the Select All button.
3. You can filter the report by a specific Responsible Party.
4. You can select a report for a single Enclosure or for an Enclosure List. Include Enclosure Below is only activated for a single Enclosure. If you want the report for multiple Enclosures, you will need to create an Enclosure List.
5. You can group by the Enclosure, the Event or the Date.
6. The options for Provisional Data will display ONLY if you have Provisional activated for your institution.

Below is an example Enclosure Report for a single tank on a single day. You can now see the times of life support and component measurements to help track multiple entries in one day.

Report Start Date	<b>Enclosure Activity Report</b>				Report End Date		
11/26/2021					12/03/2021		
<small>Copyright, Species360, 2021. All rights reserved.</small>							
<b>Data for: Burrfish Tank</b>							
No Enclosure Measurements Found							
<b>Burrfish Tank   Aquarium</b>							<b>Attached Life Support Measurements</b>
Date	Time	Life Support	Type	Value	UOM	Notes	Measured By
12/03/2021	09:00	Burrfish Bruha	Water temperature	26	degree Celsius		Hannah Jenkins
12/03/2021	09:00	Burrfish Bruha	pH	7.3	pH		Hannah Jenkins
12/03/2021	15:00	Burrfish Bruha	pH	7.3	pH		Hannah Jenkins
12/03/2021	15:00	Burrfish Bruha	Water temperature	24	degree Celsius		Hannah Jenkins
No Attached Component Measurements Found							
<b>Burrfish Tank   Aquarium</b>							<b>Enclosure Maintenance</b>
Start Date	End Date	Work Order	Title	Status	Notes	Responsible Party	
12/03/2021	12/03/2021					Hannah Jenkins	
<b>Burrfish Tank   Aquarium</b>							<b>Enclosure Feed Logs</b>
Date Fed	Feeding Method	Food Provided	Quantity	UOM	Consumed	Notes	Fed By
12/03/2021	Direct	blood worms	2	gram	2		
No Animal Enclosure Moves Found							
No Enclosure Notes/Observations Found							

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### Enclosure Occupants Summary Report

This provides an inventory like Report of the numbers by species occupying an Enclosure during a specified time range.

- 1.The default Date Range is for the past week but can be edited.
- 2.You can select by individual Enclosure(s) or Enclosure Lists (if you have them) or by Enclosure Responsible Party.
- 3.You can filter by Taxonomy.

The Report shows the number of animals by species at the beginning and end of the selected Date Range as well as any additions and deletions to the numbers. Individual animals/groups are not identified.

Enclosure Occupants Summary									
Report Start Date 03/13/2019	Primates Animalia / Animals						Report End Date 03/13/2020		
<small>Copyright, Species360, 2020. All rights reserved.</small>									
	Beginning	Birth	Acquisition	Move In	Death	Disposition	Move Out	Ending	
<b>PR 1</b>									
Ateles fusciceps rufiventris/Black-headed spider monkey	0.2.0 (2)	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.2.0 (2)	
Ateles fusciceps robustus/Colombian Black Spider Monkey	1.0.0 (1)	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0 (1)	
<b>Total Count</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	
<b>PR 2</b>									
Cercopithecus ascanius schmidt/Schmidt's monkey	1.0.0 (1)	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0 (1)	
<b>Total Count</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	
<b>PR 3</b>									
Varecia variegata variegata/Black-and-white ruffed lemur	3.0.0 (3)	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	3.0.0 (3)	
<b>Total Count</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	
<b>PR 4</b>									
Colobus angolensis palliatus/Black-and-white colobus	1.2.0 (3)	0.0.0	0.0.1	0.0.0	1.0.0	0.0.0	0.0.0	0.2.1 (3)	
<b>Total Count</b>	<b>3</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>3</b>	
<p>#: Including groups, may not add across due to census count entries            *: Including colonies            ~: Multiple enclosures, total count for these entities will display in each enclosure they are assigned to.</p>									
Printed: 03/13/2020 07:57			Greenville Zoo			Page: 1 of 1			

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### Enclosure Report

This Report provides a list of occupants for a specified Enclosure during a Date Range. The advantage of this Report is that the actual animals/groups are identified.

The screenshot shows the 'Enclosure Report' form with the following fields and options highlighted by numbered callouts:

- 1:** Taxonomic Scope dropdown menu (set to 'Animalia / Animals').
- 2:** Enclosure dropdown menu (set to 'Primate Row').
- 3:** Report Start Date field (set to '01/01/2020').
- 4:** Collections dropdown menu (set to 'Education Collection, Main Institution').
- 5:** Animal Identifier Type dropdown menu (set to 'Band, House Name').
- 6:** Exclude open zero count groups checkbox (checked).
- 7:** Sort Option dropdown menu.
- 8:** Note Type dropdown menu (set to 'Please Select').
- 9:** Include Enclosure History checkbox (unchecked).

Other visible elements include: 'Run Report', 'Export For Raw Excel', 'Favourite Search Filters', a note about data latency, and 'Print Type' options (A4 selected, Letter unselected).

1. Select the desired Taxonomy; Include Taxonomy below checked by default.
2. Select a single Enclosure or an Enclosure List. For multiple Enclosures you will need to create an Enclosure List.
3. Enter the desired Date Range.
4. All Collections are included by default but can be edited.
5. Identifiers can be included.
6. Excluding open groups with a count of zero is checked by default.
7. Sort Option functionality is not available at this time; sort is by Enclosure.
8. Including Note Types functionality is not available at this time.
9. Include Enclosure History functionality is not available at this time.

Below is the report run for the filters selected above. The date (highlighted) is the Birth/Hatch Date or the Established Date for a Group.

Report Start Date	Enclosure Report For	Report End Date			
01/01/2020	Animalia / Animals within: Primate Row	03/13/2020			
<small>Copyright, Species360, 2020. All rights reserved.</small>					
<b>GREENVISC\Primate Row\PR 1</b>					
XCA059 / 25762005   Female   <i>Ateles fusciceps rufiventris</i> / Black-headed spider monkey   ~From 01/01/1974 To 12/31/1974					
Reported By	Date	Type	Identifier	Location	Comments
BALTIMORE	10/19/1976	House Name	SELMA		
GREENVISC	10/19/1976	House Name	Selma		
XCA061 / 25762006   Female   <i>Ateles fusciceps rufiventris</i> / Black-headed spider monkey   05/22/1997					
Reported By	Date	Type	Identifier	Location	Comments
BALTIMORE	05/22/1997	House Name	JASMIN		
GREENVISC	05/22/1997	House Name	Jasmin		
M10008 / 27197600   Male   <i>Ateles fusciceps robustus</i> / Colombian Black Spider Monkey   08/18/2001					
Reported By	Date	Type	Identifier	Location	Comments
OMAHA	02/05/2002	House Name	MOJO		
GREENVISC	05/20/2010	House Name	Mojo		
<b>GREENVISC\Primate Row\PR 2</b>					
M12002 / MIG12-29196043   Male   <i>Cercopithecus ascanius schmidti</i> / Schmidt's monkey   06/14/2008					
Reported By	Date	Type	Identifier	Location	Comments
LOWRY	06/24/2008	House Name	Stewie		
GREENVISC	04/28/2012	House Name	Stewie		
<b>GREENVISC\Primate Row\PR 3</b>					
M11007 / 10285953   Male   <i>Varecia variegata variegata</i> / Black-and-white ruffed lemur   05/08/2000					
Reported By	Date	Type	Identifier	Location	Comments
TULSA	01/19/2001	House Name	Mazette		Legacy SLocation: Legacy Comment: Means: Gosh. Tif B
GREENVISC	05/08/2011	House Name	Maz		
M11008 / MIG12-29242505   Male   <i>Varecia variegata variegata</i> / Black-and-white ruffed lemur   05/07/2000					

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### Global Permit Report

Institutions have the option to mark a Permit as visible globally This is very helpful when another institution needs to reference your permit number such as for Captive Bred Wildlife registration in the United States and BALAI registration in Europe.

The screenshot shows the 'Global Permit Report' interface. At the top, there are buttons for 'Run Report', 'Export For Raw Excel', and 'Favourite Search Filters'. A note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' Below this, a section titled 'Specify at least one of these parameters' contains several filter options:

- 1**: A callout pointing to the 'Permit Type' dropdown menu, which is currently set to 'Collection', and the 'Listing Authority' dropdown menu, which is set to 'Please Select'.
- 2**: A callout pointing to the 'Effective Start Date' and 'Expiration Start Date' date input fields.
- 3**: A callout pointing to the checked checkbox 'Include permits set to Local scope'.
- 4**: A callout pointing to the unchecked checkbox 'Include no permit recorded'.
- 5**: A callout pointing to the radio button selection for 'Continent', which is currently selected, and the 'Continent \*' dropdown menu, which is set to 'North America'.

At the bottom, there is a 'Print Type' section with radio buttons for 'A4' (selected) and 'Letter'.

- 1.You need to select either a Permit Type or a Listing Authority. You can select both.
- 2.You can filter by Effective Start Date and Expiration Date Ranges. If no date entered the search will be open ended.
- 3.Include Permits set to Local scope will only return data on your institution’s permits. You will not see any data for another institution’s Local permits.
- 4.Include no permit recorded will display the name of the institution with no data. This can be helpful when trying to find out if an institution has that type of permit but has just not marked it as Global scope.
- 5.You can filter from Global scope (all institutions in ZIMS) down to your institution.

The Report below was run using the filters above.

Effective Start Date	<b>Global Permit Report</b>					Expiration Start Date	SPECIES 360
Effective End Date	Collection					Expiration End Date	
<small>Copyright, Species360, 2020. All rights reserved.</small>							
Mnemonic	Type	ID	Name	Authority	Effective	Expiration	Assigned
ASDM TUSC	Collection	MB675476-1	USDI SCIENTIFIC COLLECTING	US Dept of the Interior (USDI)	05/23/2014	03/31/2020	1
ASHEBORO	Collection	DFW17019U	ES Scientific Research/Collection /Export/Retention	Undetermined Listing Authority (ZIMS Data Migration)	02/17/2017	12/31/2018	1
ASHEBORO	Collection	TE-18986C-0	Native Endangered Species Recovery	US Dept of the Interior (USDI)	08/17/2017	08/31/2022	1
CA LIV MU	Collection	93-C-0275	USDA	USDA / APHIS / Wildlife Services	02/04/2017	04/17/2017	8
CA LIV MU	Collection	MB673400-0	USFWS Eagle Exhibiting Possession	US Fish and Wildlife Service [General]	03/26/2014	03/31/2017	2
COLUMBIA	Collection	F-18-49	SCDNR Scientific Collecting Permit F-18-49	South Carolina DNR	04/17/2018	12/31/2018	1
COLUMBIA	Collection	SC-11854	Scientific Collecting Permit- Triakis semifasciata	California Department of Fish & Wildlife	11/01/2011	11/01/2013	0
KAMLOOPS	Collection	WM-0096	1997 Scientific Collection Permit	Washington Dept of Fish & Wildlife	04/30/1997	06/30/1997	2
NATAVPGH	Collection	112644 Research	US Veterinary Permit for Import / Transport of Controlled Materials	USDA/Aphis/Veterinary Services	03/23/2017	02/09/2019	1
PALO ALTO	Collection	Certificate # 93-C-0730	Class C Exhibitor	USDA / APHIS / Wildlife Services	02/24/2017	02/24/2018	1
PETERSBOR	Collection	4750	CITES	Government of Canada	10/17/1997	12/31/1997	5
SANFORD	Collection	MA675130-2	CAPTIVE-BRED WILDLIFE	US Fish and Wildlife Service [General]	01/27/2015	01/17/2018	1
WINNIPEG	Collection	16-MB-D006	Migratory Bird Damage or Danger Permit 2016 (Canada Geese)	Environment Canada	03/01/2016	03/01/2017	1

## Exports

### i-FAP

This is a custom report for French members serving their i-FAP annual reporting requirements.

and was designed strictly for use by institutions in France to meet year-end i-FAP reporting requirements. Clicking the report will immediately export the report to Excel; there are no parameters to select prior to running the report. The format replicates the design required for submission.

Access to this report is assigned to the Local Admin Species360 template Role. If others require the ability to run this report, that access will need to be assigned to their custom Role.

### Rapport i-FAP

Ceci est un rapport personnalisé pour les membres français répondant à leurs obligations en matière de rapports annuels pour i-FAP.

Ce rapport se trouve sous Démarrer> Rapports> i-FAP et a été conçu pour être utilisé strictement par les institutions françaises afin de se conformer aux exigences de rapports de fin d'année. En cliquant sur le rapport, le rapport sera immédiatement exporté vers Excel; il n'y a pas de paramètres à sélectionner avant d'exécuter le rapport. Le format reproduit la conception requise pour la soumission.

L'accès à ce rapport est attribué au rôle de modèle Local Admin Species360. Si d'autres personnes ont besoin de pouvoir exécuter ce rapport, cet accès devra être attribué à leur rôle personnalisé.

### [SAFE for Chondrichthyes Census](#)

This report was developed from the AZA SAFE (Save Animals From Extinction) for Sharks and Rays program. It is an Excel export that is compatible with the SAFE for Sharks and Rays database upload tool. There are no parameters to select prior to running the Report. It will return the following data on all Chondrichthyes currently held by your institution:

- ID – This is the SAFE for Sharks and Rays Project ID and assigned by AZA
- Accession Number – Local ID
- GAN
- Scientific Name
- Common Name
- Group or Individual – “0” for individual, “1” for group record
- Population – sex count in M.F.U format
- Birth Date Start
- Birth Date End
- Last Updated
- Notes

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### [Inventory Detail Report](#)

This Report displays the starting and ending counts of species during a date range. It can include both animals physically held and/or legally owned, depending on the filters selected. Columns indicate ins and outs for your institution.

### [Using the Report](#)

The screenshot shows the 'Inventory Detail Report' interface. At the top, there are buttons for 'Run Report', 'Export For Raw Excel', and 'Favourite Search Filters'. A note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' The form is divided into several sections:

- Scope:** Contains 'Report Start Date' (1) and 'Report End Date' (1) fields, 'Taxonomic Scope' (2) dropdown, and 'Collections' (3) dropdown.
- Show IUCN Or CITES Filters:** (4) A checkbox section with radio buttons for 'Cites', 'Cites EU', and 'IUCN', and a 'Cites Type' dropdown.
- Display Options:** Contains 'Sort By' (5) dropdown, 'Taxonomic Resolution' (6) dropdown, and several checkboxes: 'Display Taxonomic Tree' (7), 'Include animals Out On Loan', 'Include animals Owned And Onsite', 'Include animals In On Loan' (8), and 'Include Groups' (9). Below these are 'Print Type' options: 'A4' and 'Letter'.

- 1.The Start Date defaults to the beginning of the year and the End Date defaults to today, but both are editable.
- 2.Select the Taxonomic Scope you desire.
- 3.By default all Collections are included but these can be edited.
- 4.Checking the Show IUCN or CITES Filters will activate the fields below to select from. The CITES and IUCN status will display by default even if this is not checked. This option allows you to run an Inventory Report for only those species meeting the criteria selected.
- 5.You can sort by the Taxonomic Tree or by Scientific Name alphabetically.
- 6.Taxonomic Resolution allows you to have the Report display from Superkingdom down to Breed and below. If you have domestics that you want to display as such you will need to adjust the Taxonomic Resolution.
- 7.Checking Display Taxonomic Tree will include all levels above the Taxonomic Resolution selected (see example below).
- 8.You then need to select the physical and ownership status you want displayed. These will each show as their own line in the Report.
- 9.Groups are not included by default. Checking Include Groups will activate the option to Include Group Split/Merge Transactions. These are not usually included as often group Splits and Merges do not involve actual number changes for your collection.

Taxonomy	Beginning	Births	Acquisitions	Change	Deaths	Dispositions	Ending Status
<b>Detailed Inventory Report for</b>							
Report Start Date 01/01/2020				Animalia / Animals		Report End Date 03/20/2020	
Copyright, Species360, 2020. All rights reserved.							
<i>Hadrurus arizonensis</i> Desert hairy scorpion							
Owned And Onsite	0.0.1	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.1
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<i>Hadogenes troglodytes</i> Flat rock scorpion							
Owned And Onsite	0.0.1	0.0.0	0.0.0	-1	0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0	1	0.0.0	0.0.0	0.0.1
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<i>Pandinus cavimanus</i> Redclawed emperor scorpion							
Owned And Onsite	0.0.1	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.1
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<i>Pandinus imperator</i> CITES: II Common emperor scorpion							
Owned And Onsite	0.0.1	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.1
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.6		0.0.0	0.0.0	0.0.8
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<i>Brachypelma smithi</i> CITES: II/IUCN: Near Threatened (LR/nt) Red-kneed tarantula							
Owned And Onsite	0.1.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.1.0
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Groups *	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0

Some things to note about the Report:

- 1.The first column is the count on the Report Start Date.
- 2.The Change column indicates an Ownership or Physical status change during the time period of the Report. In the Report above we still physically held the Flat rock scorpion but we had given ownership to another Institution.
3. The Owned and Onsite count was reduced by one (-1) and the In On Loan count was increased by one (1).
- 4.The last column is the count at the Report End Date.
- 5.Groups only have one line and it includes all variations of Physical and Ownership. If you have used a Census to record the count change in the group, the line may not add up across as ins and outs are not captured. See [Impact of Group Census Versus Group Partial Transactions](#) for more information on this.

Report Start Date	Detailed Inventory Report for						Report End Date
01/01/2020	Animalia / Animals						03/20/2020
<small>Copyright, Species360, 2020. All rights reserved.</small>							
<b>Summary Specimen Counting:</b>							
	Beginning	Births	Acquisitions		Deaths	Dispositions	Ending Status
Owned And Onsite	66.69.43	0.1.4	0.2.1		1.0.0	0.0.0	65.72.47
In On Loan	19.22.11	0.0.0	1.0.0		0.0.0	0.0.0	20.22.12
Out On Loan	5.2.0	0.0.0	0.0.0		0.0.0	0.0.0	5.2.0
Groups *	4.9.155	0.0.0	0.0.18		0.0.0	0.0.6	4.9.175
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Institution Inventory Taxonomic Summary:</b>							
<i>Arachnida</i>							
	Owned 11 Individuals, 8 Species						
	On Site 12 Individuals, 9 Species						
	Groups * 14 Individuals, 2 Species						
	Colonies 0 Individuals, 0 Species						
<i>Insecta</i>							
	Owned 0 Individuals, 0 Species						
	On Site 0 Individuals, 0 Species						
	Groups * 122 Individuals, 3 Species						
	Colonies 0 Individuals, 0 Species						
<i>Diplopoda</i>							
	Owned 0 Individuals, 0 Species						
	On Site 0 Individuals, 0 Species						
	Groups * 11 Individuals, 1 Species						
	Colonies 0 Individuals, 0 Species						
<i>Amphibia</i>							
	Owned 3 Individuals, 2 Species						
	On Site 3 Individuals, 2 Species						
	Groups * 15 Individuals, 1 Species						
	Colonies 0 Individuals, 0 Species						
<i>Reptilia</i>							
	Owned 73 Individuals, 29 Species						
	On Site 102 Individuals, 32 Species						
	Groups * 0 Individuals, 0 Species						
	Colonies 0 Individuals, 0 Species						
<i>Aves</i>							
	Owned 64 Individuals, 22 Species						
	On Site 65 Individuals, 22 Species						
	Groups * 0 Individuals, 0 Species						
	Colonies 0 Individuals, 0 Species						
<i>Mammalia</i>							
	Owned 40 Individuals, 22 Species						
	On Site 56 Individuals, 26 Species						
	Groups * 26 Individuals, 2 Species						
	Colonies 0 Individuals, 0 Species						
* = May not add across due to census count entries. In addition, you may have to check "Include Group Split / Merge Transactions" in order to see accurate acquisitions/dispositions in cases where individuals and groups were merged into groups.							

At the end of the Report is a summary grid for the counts of specimens within each column. Below that is a breakdown of the Species (or whatever you selected for your Taxonomic Resolution in your Report filters) counts.

### Impact in the Report of Group Census Versus Group Partial Transactions

ZIMS offers two methods to track the changes in numbers of your Group records:

1. Census - Record a count of the population using the desired tracking for the Group

2. Partial Transaction – Record additions or deletions to the Group by selecting a transaction type and recording the numbers associated with it

Some institutions use one or the other, but the majority of institutions use a mix of the two methods. How these methods are reflected on the Inventory Report are different, and you need to understand the differences to make sure the method you select works for you and you can accurately interpret the report.

### CENSUS ONLY

Census counts are not reflected in the Inventory Report because no addition or deletion Terms are recorded. We recorded the following Census Counts:

Census Info								
Census Date	Census Event	Total Count	Sex Track	LS Track	Method	RP	Reported By	
Oct 08, 2018 01:36 PM	Census	0.0.14	✗	✗	Undetermined -		GREENVISC	
May 07, 2018 01:36 PM	Census	0.0.21	✗	✗	Undetermined -		GREENVISC	
Feb 02, 2018 01:34 PM	Census	0.0.17	✗	✗	Undetermined -		GREENVISC	
Jan 01, 2018 12:00 AM	From Another Institution(0.0.20)	0.0.20	✗	✗	Undetermined -		GREENVISC	

We ran a Detailed Inventory Report for 1 February 2018 through 8 October 2018:

Report Start Date Feb 01, 2018	<b>Detailed Inventory Report for</b> Dendrobates labialis/Poison dart frog					Report End Date Oct 08, 2018	<b>SPECIES 360</b>
Copyright, Species360, 2018. All rights reserved.							
<b>Taxonomy</b>	<b>Beginning</b>	<b>Births</b>	<b>Acquisitions</b>	<b>Change</b>	<b>Deaths</b>	<b>Dispositions</b>	<b>Ending Status</b>
<i>Dendrobates labialis</i>	CITES: II						Poison dart frog
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	0.0.0	0.0.0		0.0.0	0.0.0	<b>0.0.14</b>
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Summary Specimen Counting:</b>							
	<b>Beginning</b>	<b>Births</b>	<b>Acquisitions</b>		<b>Deaths</b>	<b>Dispositions</b>	<b>Ending Status</b>
Owned And Onsite	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	0.0.0	0.0.0		0.0.0	0.0.0	<b>0.0.14</b>
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Institution Inventory Taxonomic Summary:</b>							
<i>Amphibia</i>							
Owned 0 Individuals, 0 Species							
On Site 0 Individuals, 0 Species							
Groups * 14 Individuals, 1 Species							
Colonies 0 Individuals, 0 Species							
* = May not add across due to census count entries. In addition, you may have to check "Include Group Split / Merge Transactions" in order to see accurate acquisitions/dispositions in cases where individuals and groups were merged into groups.							

The Beginning count is 20 because the Group was acquired prior to the report Start Date. The Ending Status is 14 because that was the last Census recorded before the End Date. The two Census Counts taken in between are not reflected because no actual addition or deletion Terms to the Group were recorded. The numbers do not add up across and this is correct.

**PARTIAL TRANSACTIONS ONLY**

For the next Group we recorded Partial Transactions using My Transactions and did not use a Census.

The Census grids displays the transactions recorded.

**Census Info**

Track By Sex Type  Track By Life Stage   Colony  Show only my records

Census Date	Census Event	Total Count	Sex Track	LS Track	Method	RP	Reported By
Oct 08, 2018 12:00 PM	Partial Acq. Into Group (Birth / Hatch)(0.0.2)	0.0.12	✗	✗	-	-	GREENVISC
Jul 10, 2018 12:00 PM	Partial Disp. From Group (Missing)(0.0.5)	0.0.10	✗	✗	-	-	GREENVISC
Feb 05, 2018 12:00 PM	Partial Death Event in Group(0.0.5)	0.0.15	✗	✗	-	-	GREENVISC
Jan 01, 2018 12:00 AM	From Another Institution(0.0.20)	0.0.20	✗	✗	Undetermined	-	GREENVISC

We ran a Detailed Inventory Report for 1 February 2018 to 8 October 2018:

Report Start Date: Feb 01, 2018

**Detailed Inventory Report for**  
Dendrobates leucomelas/Yellow-headed poison frog

Report End Date: Oct 08, 2018

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Taxonomy	Beginning	Births	Acquisitions	Change	Deaths	Dispositions	Ending Status
<i>Dendrobates leucomelas</i>	CITES: I/IIUCN: Least Concern (LC)			Yellow Striped Poison Arrow Frog			
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	<b>0.0.2</b>	0.0.0		<b>0.0.5</b>	<b>0.0.5</b>	<b>0.0.12</b>
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0

**Summary Specimen Counting:**

	Beginning	Births	Acquisitions	Deaths	Dispositions	Ending Status
Owned And Onsite	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	<b>0.0.2</b>	0.0.0	<b>0.0.5</b>	<b>0.0.5</b>	<b>0.0.12</b>
Colonies	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0	0.0.0

**Institution Inventory Taxonomic Summary:**  
*Amphibia*

Owned 0 Individuals, 0 Species  
On Site 0 Individuals, 0 Species  
Groups \* 12 Individuals, 1 Species  
Colonies 0 Individuals, 0 Species

\* = May not add across due to census count entries. In addition, you may have to check "Include Group Split / Merge Transactions" in order to see accurate acquisitions/dispositions in cases where individuals and groups were merged into groups.

Because all the count changes were entered as Partial Transactions, the numbers across add up.

**CENSUS AND PARTIAL TRANSACTIONS MIX**

This method of tracking the numbers in your Group uses both recording a Census and recording Partial Transactions. Perhaps your policy is to record a census every few months and also track known transactions such as Births or Deaths in between. What displays in the Census grid is a combination of transactions and census counts:

Census Date	Census Event	Total Count	Sex Track	LS Track	Method	RP	Reported By
Oct 05, 2018 08:26 AM	Census	0.0.25	✗	✗	Undetermined	-	GREENVISC
Aug 07, 2018 12:00 PM	Partial Death Event in Group(0.0.6)	0.0.17	✗	✗	-	-	GREENVISC
May 08, 2018 12:00 PM	Partial Acq. Into Group (Birth / Hatch)(0.0.5)	0.0.23	✗	✗	-	-	GREENVISC
Mar 06, 2018 08:24 AM	Census	0.0.18	✗	✗	Undetermined	-	GREENVISC
Jan 01, 2018 12:00 AM	From Another Institution(0.0.20)	0.0.20	✗	✗	Undetermined	-	GREENVISC

We ran a Detailed Inventory Report for 1 February 2018 to 8 October 2018:

Report Start Date Feb 01, 2018	<b>Detailed Inventory Report for</b> Dendrobates truncatus/Yellow-striped poison dart frog	Report End Date Oct 08, 2018	<b>SPECIES 360</b>				
<small>Copyright, Species360, 2018. All rights reserved.</small>							
<b>Taxonomy</b>	<b>Beginning</b>	<b>Births</b>	<b>Acquisitions</b>	<b>Change</b>	<b>Deaths</b>	<b>Dispositions</b>	<b>Ending Status</b>
<i>Dendrobates truncatus</i>	CITES: II/IUCN: Least Concern (LC)					Yellow-striped poison dart frog	
Owned And Onsite	0.0.0	0.0.0	0.0.0	0	0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	<b>0.0.5</b>	0.0.0		<b>0.0.6</b>	0.0.0	<b>0.0.25</b>
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Summary Specimen Counting:</b>							
	<b>Beginning</b>	<b>Births</b>	<b>Acquisitions</b>		<b>Deaths</b>	<b>Dispositions</b>	<b>Ending Status</b>
Owned And Onsite	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
In On Loan	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
Out On Loan	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Groups *</b>	<b>0.0.20</b>	<b>0.0.5</b>	0.0.0		<b>0.0.6</b>	0.0.0	<b>0.0.25</b>
Colonies	0.0.0	0.0.0	0.0.0		0.0.0	0.0.0	0.0.0
<b>Institution Inventory Taxonomic Summary:</b>							
<i>Amphibia</i>							
Owned 0 Individuals, 0 Species							
On Site 0 Individuals, 0 Species							
Groups * 25 Individuals, 1 Species							
Colonies 0 Individuals, 0 Species							
<small>* = May not add across due to census count entries. In addition, you may have to check "Include Group Split / Merge Transactions" in order to see accurate acquisitions/dispositions in cases where individuals and groups were merged into groups.</small>							

The Births and Deaths recorded as Partial Transactions display. The Census Counts do not display. Therefore, the row does not add up across as the Ending Status is either the most recent Census taken, or the count after the most recent Partial Transaction. This is correct.

**RECOMMENDATIONS**

If you do not care about an Inventory Report adding correctly across and only want to track numbers at a specified time, use the Census Count.

If you want the Inventory Report to add up across the line use Partial Transactions. If the reason for the increase in numbers is known, such as Births, record as such. If it is not known, select a Partial Acquisition of Undetermined/Indeterminate. If the reason for the decrease in numbers is known, such as Deaths, record as such. If the reason is not known, select a Partial Disposition of Undetermined/Indeterminate.

If you want to use a mix of the two methods be aware that your Inventory Report will not add up across the row should you need to explain why to a Staff member or inspector.

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**Inventory Summary Report**

This Report details the starting and ending counts of a Species during a selected Date Range. Physically held and Legally owned must be run as separate reports. Columns indicate the ins and outs at your Institution.

The screenshot shows the 'Inventory Summary Report' interface. At the top, there are buttons for 'Run Report', 'Export For Raw Excel', and a dropdown for 'Favourite Search Filters'. A red note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' Below this, the interface is divided into several sections:

- Taxonomic Scope \***: A search box containing 'Animalia / Animals' with a magnifying glass icon.
- Taxonomic Resolution \***: A dropdown menu set to 'Species' (callout 1).
- Report Start Date \***: A date field set to '01/01/2020' (callout 2).
- Report End Date \***: A date field set to '03/20/2020' (callout 2).
- Physical or Ownership**: A dropdown menu set to 'Physical' (callout 3).
- Sort By**: A dropdown menu set to 'Taxonomic Order' (callout 4).
- Include Groups**: A checked checkbox (callout 5).
- Include Group Split / Merge Transactions**: An unchecked checkbox.
- Collections**: A dropdown menu set to 'Education Collection, Main Insti' (callout 6).
- Print Type**: Radio buttons for 'A4' (selected) and 'Letter'.

- 1.The Taxonomic Resolution can be from Kingdom to Breed and below. If you have domestics, you want displayed as such you will need to select a resolution of Breed.
- 2.The default Date Range is the first of the year to today but can be edited.

- 3.You must select Physical or Ownership. Physical will return all animals physically at your facility regardless of Ownership. Ownership will return all animal you own regardless of where they are physically held.
- 4.You can sort the report by the Taxonomic Tree or by Scientific Name alphabetically.
- 5.Groups are included by default but can be excluded. If you want to display Splits and Merges in your Groups you will need to check that box. Splits and Merges are commonly not included as they often do not reflect changing numbers in your collection.
- 6.All Collections are included by default but can be removed if desired.

Report Start Date		Summary Inventory Report For				Report End Date	
01/01/2020		Mammalia/Mammals				03/20/2020	
Report Type:		Physical					
<i>Monodelphis domestica</i>	Grey short-tailed opossum	0.2.0	0.0.0	0.0.0	0.0.0	0.0.0	0.2.0
<i>Macropus giganteus</i>	Eastern grey kangaroo	1.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0
<i>Hoplia wallia</i>	Cute little wallaby	0.1.0	0.0.0	0.0.0	0.0.0	0.0.0	0.1.0
<i>Myrmecophaga tridactyla</i>	Giant anteater	1.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0
<i>Varecia variegata</i>	Black-and-white ruffed lemur	3.0.0	0.0.0	0.0.0	0.0.0	0.0.0	3.0.0
<i>Ateles fusciceps</i>	Black-headed spider monkey	1.2.0	0.0.0	0.0.0	0.0.0	0.0.0	1.2.0
<i>Cercopithecus ascanius</i>	Guenon	1.1.0	0.0.0	0.0.0	0.0.0	0.0.0	1.1.0
<i>Colobus angolensis</i>	Angolan colobus	0.2.1	0.0.0	0.0.0	0.0.0	0.0.0	0.2.1
<i>Symphalangus syndactylus</i>	Siamang	3.1.0	0.0.0	0.0.0	0.0.0	0.0.0	3.1.0
<i>Pongo pygmaeus</i>	Bornean orangutan	0.0.0	0.0.0	1.0.0	0.0.0	0.0.0	1.0.0
<i>Pongo abelii</i>	Sumatran orangutan	0.3.0	0.0.0	0.0.0	0.0.0	0.0.0	0.3.0
<i>Callosciurus prevostii</i>	Prevost's squirrel	0.2.0	0.0.0	0.0.0	0.0.0	0.0.0	0.2.0
<i>Heterocephalus glaber</i> *	Naked mole-rat	0.0.15	0.0.0	0.0.0	0.0.0	0.0.0	0.0.15
<i>Acinonyx jubatus</i>	Cheetah	0.0.0	0.1.0	0.0.0	0.0.0	0.0.0	0.1.0
<i>Leopardus pardalis</i>	Ocelot	1.1.0	0.0.0	0.0.0	0.0.0	0.0.0	1.1.0
<i>Panthera leo</i>	Lion	2.0.0	0.0.0	0.0.0	0.0.0	0.0.0	2.0.0
<i>Panthera pardus</i>	Leopard	1.1.0	0.0.0	0.0.0	0.0.0	0.0.0	1.1.0
<i>Canis lupus</i> *	Gray wolf	0.3.0	0.0.0	0.0.12	0.0.0	0.0.6	0.3.6
<i>Zalophus californianus</i>	California sea lion	0.1.0	0.0.0	0.0.0	0.0.0	0.0.0	0.1.0
<i>Potos flavus</i>	Kinkajou	1.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0
<i>Nasua narica</i>	White-nosed coati	1.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0
<i>Ailurus fulgens</i>	Red panda	3.3.0	0.0.1	0.0.0	0.0.0	0.0.0	3.3.1
<i>Babyrousa babyrussa</i>	Buru babirusa	0.0.0	0.0.0	0.1.0	0.0.0	0.0.0	0.1.0
<i>Sus scrofa</i>	Wild boar	1.0.0	0.0.0	0.0.0	0.0.0	0.0.0	1.0.0
<i>Giraffa camelopardalis</i>	Giraffe	1.2.0	0.0.0	0.0.0	0.0.0	0.0.0	1.2.0
<i>Capra hircus</i>	Goat	0.3.0	0.0.0	0.0.0	0.0.0	0.0.0	0.3.0
<b>TOTAL</b>		<b>21.28.16</b>	<b>0.1.1</b>	<b>1.1.12</b>	<b>0.0.0</b>	<b>0.0.6</b>	<b>22.30.23</b>

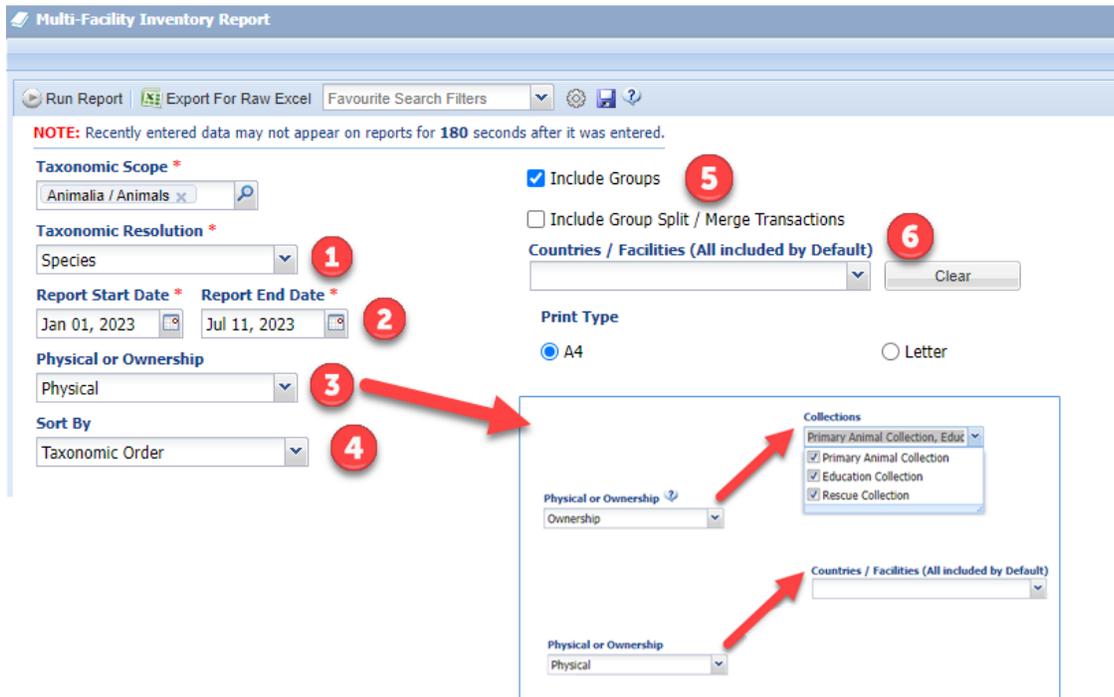
\* = Group Inventory Counts Included In Row  
 \*\* = Colony counts included in Row  
 + = Both Group and Colony counts included in Row

The Report above was run for Mammals physically held at our facility. Note that Groups/Colonies do not have their own line but are indicated by an asterisk or plus sign to the right of the Taxonomic Name. If you have used a Census count to change the numbers in your Groups, the line may not add up across. See [Impact of Blue Census Versus Group Partial Transactions](#) for more information.

[Back to Topics Covered](#)

Multi Facility Inventory report

This report can only be accessed when logged in through a parent organization or association. It allows the parent organization or association to run inventory summary reports for any of the child facilities in one report.



- 1.The Taxonomic Resolution can be from Kingdom to Breed and below. If you want to display domestics separately, you will need to select a resolution of Breed.
- 2.The default Date Range is the first of the year to today but can be edited.
- 3.You must select Physical or Ownership.
  - Physical will return all animals that are physically held at your child institutions regardless of Ownership.
  - When Ownership is selected the Countries/Facilities dropdown will revert to Collections dropdown. Ownership will return all animals the parent institution owns regardless of where they are physically held.
- 4.You can sort the report by the Taxonomic Tree or by Scientific Name alphabetically.
- 5.Groups are included by default but can be excluded. If you want to display Splits and Merges in your Groups you will need to check that box. Splits and Merges are commonly not included as they often do not reflect changing numbers in your collection.
6. When running the report for Physical all Countries/Facilities are included by default but can be removed if desired through the dropdown. When running for Ownership all collections are included by default but can be removed if desired through the dropdown.

Mnemonic	Beginning	Births	Acquisitions	Deaths	Dispositions	Ending
<b>Summary Inventory Report For</b>						
Report Start Date	Sphenisciformes/Penguins					Report End Date
1/1/2023						7/18/2023
<b>Physical</b>						
<small>Copyright, Species360, 2023. All rights reserved.</small>						
<b>Aptenodytes forsteri</b> Emperor penguin, CITES: -, IUCN: Least Concern (LC)						
TRAINING3	2.2.0	0.0.0	0.0.0	0.0.0	0.0.0	2.2.0
<b>Totals</b>	<b>2.2.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>2.2.0</b>
<b>Pygoscelis papua</b> / Gentoo penguin, CITES: -, IUCN: Near Threatened (NT)						
TRAINING3	5.0.0	0.0.0	0.0.0	0.0.0	0.0.0	5.0.0
<b>Totals</b>	<b>5.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>5.0.0</b>
<b>Eudyptula minor</b> / Blue penguin, CITES: -, IUCN: Least Concern (LC)						
TRAINING2	2.2.1	0.0.0	0.0.0	0.0.0	0.0.0	2.2.1
TRAINING3	2.4.0	4.0.0	0.0.0	0.0.0	0.0.0	6.4.0
<b>Totals</b>	<b>4.6.1</b>	<b>4.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>8.6.1</b>
<b>Spheniscus humboldti</b> / Humboldt penguin, CITES: I, IUCN: Vulnerable (VU)						
TRAINING2	2.3.0	0.0.0	0.0.0	0.0.0	0.0.0	2.3.0
<b>Totals</b>	<b>2.3.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>2.3.0</b>
<b>Grand Totals</b>	<b>13.11.1</b>	<b>4.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>17.11.1</b>

\* = Group Inventory Counts Included In Row  
 \*\* = Colony counts included in Row  
 + = Both Group and Colony counts included in Row

**Included Institutions**  
 [TRAINING2] Training2  
 [TRAINING3] TRAINING3

The report above was run for two child institutions for ‘Sphenisciformes’ that were physically held. If a species is held at both institutions then two lines will display with a Totals line beneath. The Grand Totals line at the end of the report is the sum of all institution's animals included in the report.

Taxonomic	Common Name	Beginning	Births	Acquisitions	Deaths	Dispositions	Ending
<b>Summary Inventory Report For</b>							
Report Start Date	Sphenisciformes/Penguins						Report End Date
Jan 01, 2023							Jul 19, 2023
<b>Ownership</b>							
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<b>Spheniscus demersus</b>	Jackass penguin	4.3.0	0.0.0	0.0.0	0.0.0	0.0.0	4.3.0
<b>Spheniscus humboldti</b>	Humboldt penguin	0.1.0	0.0.0	0.0.0	0.0.0	0.0.0	0.1.0
<b>TOTAL</b>		<b>4.4.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>0.0.0</b>	<b>4.4.0</b>

\* = Group Inventory Counts Included In Row  
 \*\* = Colony counts included in Row  
 + = Both Group and Colony counts included in Row

**Included Institutions**  
 [TRAINING] Training

The report above was run for Ownership for ‘Sphenisciformes’. As it was run for ownership for the parent institution, it will show any animals owned by the parent organization/association regardless of where they are physically held at child institutions/facilities, and as such will not distinguish by presenting in separate lines.

## Loan Report

This Report displays animals that either In-On-Loan at your facility (not owned by you but physically held) or Out-On-Loan at another facility (owned by you but not held by you).



The screenshot shows the 'Loan Report' 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.' Below this, the interface is divided into several sections:

- Taxonomic Scope \***: A dropdown menu set to 'Animalia / Animals' with a search icon. A checkbox 'Include Taxonomy below selected level' is checked.
- Report Start Date \***: A date field set to '01/01/2020'.
- Report End Date \***: A date field set to '03/23/2020'.
- Loan Type \***: A dropdown menu set to 'Loan In (at your facility, not owned t...' with a callout '1'.
- Sort By**: A dropdown menu set to 'Institution' with a callout '2'.
- Collections**: A dropdown menu set to 'Education Collection, Main Institution' with a callout '3'.
- Specific Party**: A search field for 'Search Institution' with a callout '4'.
- Animal Identifier Type**: A dropdown menu set to 'Please Select' with a 'Select All' button and a callout '5'.
- Note Type**: A dropdown menu set to 'Please Select' with a 'Select All' button and a callout '7'.
- Print Type**: Radio buttons for 'A4' (selected) and 'Letter'.
- Exclude Zero-Count Open Groups**: A checkbox that is checked with a callout '6'.

Some things to note about this Report:

1. You must select either Loan In or Loan Out.
2. You can sort the Report by Institution, Taxonomy or Local ID.
3. All Collections are included by default but can be edited.
4. You can filter the Report by a specific Institution, but only one facility per Report.
5. Adding Identifiers can help you better know what animal it is. Local ID is displayed by default.
6. Zero-count open groups are not included by default.
7. Including Note Types is helpful especially if you take note of when loan updates are sent or received using a Note.

Below is a Loan Report for animals In-On-Loan:

Report Start Date	Loan Report For	Report End Date		
01/01/2020	Animalia / Animals	03/23/2020		
Report Type: Loan In (at your facility, not owned by you)	Total Count: 53			
Copyright, Species360, 2020. All rights reserved.				
<b>San Diego Zoo</b>		<b>SANDIEGOZ</b>		
XFG001 / 25207382   Male   <i>Pongo pygmaeus pygmaeus</i> / Northwest Bornean orangutan				
<u>Visit History</u>				
Date In	Acquisition - Vendor/Local ID	Phy Own Reported By	Disposition - Recipient/Local ID	Phy Own Date Out
01/23/2006	Birth/Hatch	- In SANDIEGOZ / 506372	- - -	- - -
01/23/2006	Birth/Hatch Owner: SANDIEGOZ/506372	In - GREENVISC / XFG001	Loan Transfer To PORTLAND/UNDETERM+	Out - 12/03/2014
		- - SANDIEGOZ / 506372	Loan Out To (Change in Reported Holder) PORTLAND/B40236	- 12/03/2014
12/03/2014	Loan Transfer From Sender: GREENVISC/XFG001 Vendor: SANDIEGOZ/506372	In - PORTLAND / B40236	- - -	- - -
02/01/2020	Loan Return to Us Sender: PORTLAND/B40236	In - GREENVISC / XFG001	- - -	- - -
<b>Sex-Contraception:</b> Male		<b>Birth Type:</b> Captive Birth/Hatch		
<b>Hybrid Status:</b> False		<b>Birth Location:</b> Greenville Zoo		
<b>Enclosure:</b> Orangutans		<b>Birthdate - Age:</b> 01/23/2006 - 14Y,2M,0D		
<b>Sire:</b> MIG12-29858191 (GREENVISC / XCA018)		<b>Dam:</b> MIG12-29858181 (SANDIEGOZ / 590286)		
<b>Rearing:</b>				
M15010 / MIG12-29876880   Female   <i>Colobus angolensis palliatus</i> / Black-and-white colobus				
<u>Visit History</u>				
Date In	Acquisition - Vendor/Local ID	Phy Own Reported By	Disposition - Recipient/Local ID	Phy Own Date Out
12/03/2006	Birth/Hatch	- In ABILENE / M06005	- - -	- - -
12/03/2006	Birth/Hatch Owner: ABILENE/M06005	In - SANDIEGOZ / 506347	Loan Transfer To JACKSONVL/808321	Out - 01/22/2008
01/22/2008	Loan In From Sender: SANDIEGOZ/506347 Vendor: ABILENE/1084	In - JACKSONVL / 808321	Loan Transfer To SANDIEGOZ/506347	Out - 05/29/2013
		- - ABILENE / M06005	Loan Out To (Change in Reported Holder) JACKSONVL/808321	- 01/22/2008
		- - ABILENE / M06005	Loan Out To (Change in Reported Holder) SANDIEGOZ/506347	- 05/29/2013
05/29/2013	Loan Transfer From Sender: JACKSONVL/808321 Vendor: ABILENE/M06005	In - SANDIEGOZ / 506347	- - -	- - -
		- - ABILENE / M06005	Donation To (Ownership Only) SANDIEGOZ/506347	Out 05/29/2013
05/29/2013	Donation From Vendor: ABILENE/M06005	- In SANDIEGOZ / 506347	Loan Out To GREENVISC/M15010	Out - 05/21/2015
05/21/2015	Loan In From Sender: SANDIEGOZ/506347 Vendor: SANDIEGOZ/506347	In - GREENVISC / M15010	- - -	- - -
<b>Sex-Contraception:</b> Female		<b>Birth Type:</b> Captive Birth/Hatch		
<b>Hybrid Status:</b> False		<b>Birth Location:</b> San Diego Zoo		
<b>Enclosure:</b> PR 4		<b>Birthdate - Age:</b> 12/03/2006 - 13Y,3M,20D		
<b>Sire:</b> 26751812 (SANDIEGOZ / 504056)		<b>Dam:</b> 23049931 (SANDIEGOZ / 502193)		

Below is a Report for animals Out-On-Loan.

Report Start Date 01/01/2020	<b>Loan Report For</b> Animalia / Animals	Report End Date 03/23/2020	<b>SANDIEGOZ</b>
Report Type: Loan In (at your facility, not owned by you)	Total Count:53	Copyright, Species360, 2020. All rights reserved.	
<b>San Diego Zoo</b>			<b>SANDIEGOZ</b>
XFG001 / 25207382   Male   <i>Pongo pygmaeus pygmaeus</i> / Northwest Bornean orangutan			
<b>Visit History</b>			
<b>Date In</b>	<b>Acquisition - Vendor/Local ID</b>	<b>Phy Own Reported By</b>	<b>Disposition - Recipient/Local ID Phy Own Date Out</b>
01/23/2006	Birth/Hatch	- In SANDIEGOZ / 506372	- -
01/23/2006	Birth/Hatch Owner: SANDIEGOZ/506372	In - GREENVISC / XFG001	Loan Transfer To PORTLAND/UNDETERM+ Out - 12/03/2014
		- - SANDIEGOZ / 506372	Loan Out To (Change in Reported Holder) PORTLAND/B40236 - 12/03/2014
12/03/2014	Loan Transfer From Sender: GREENVISC/XFG001 Vendor: SANDIEGOZ/506372	In - PORTLAND / B40236	- -
02/01/2020	Loan Return to Us Sender: PORTLAND/B40236	In - GREENVISC / XFG001	- -
<b>Sex-Contraception:</b>	Male	<b>Birth Type:</b>	Captive Birth/Hatch
<b>Hybrid Status:</b>	False	<b>Birth Location:</b>	Greenville Zoo
<b>Enclosure:</b>	Orangutans	<b>Birthdate - Age:</b>	01/23/2006 - 14Y,2M,0D
<b>Sire:</b>	MIG12-29858191 (GREENVISC / XCA018)	<b>Dam:</b>	MIG12-29858181 (SANDIEGOZ / 590286)
<b>Rearing:</b>			
M15010 / MIG12-29876880   Female   <i>Colobus angolensis palliatus</i> / Black-and-white colobus			
<b>Visit History</b>			
<b>Date In</b>	<b>Acquisition - Vendor/Local ID</b>	<b>Phy Own Reported By</b>	<b>Disposition - Recipient/Local ID Phy Own Date Out</b>
12/03/2006	Birth/Hatch	- In ABILENE / M06005	- -
12/03/2006	Birth/Hatch Owner: ABILENE/M06005	In - SANDIEGOZ / 506347	Loan Transfer To JACKSONVL/808321 Out - 01/22/2008
01/22/2008	Loan In From Sender: SANDIEGOZ/506347 Vendor: ABILENE/1084	In - JACKSONVL / 808321	Loan Transfer To SANDIEGOZ/506347 Out - 05/29/2013
		- - ABILENE / M06005	Loan Out To (Change in Reported Holder) JACKSONVL/808321 - 01/22/2008
		- - ABILENE / M06005	Loan Out To (Change in Reported Holder) SANDIEGOZ/506347 - 05/29/2013
05/29/2013	Loan Transfer From Sender: JACKSONVL/808321 Vendor: ABILENE/M06005	In - SANDIEGOZ / 506347	- -
		- - ABILENE / M06005	Donation To (Ownership Only) SANDIEGOZ/506347 - Out 05/29/2013
05/29/2013	Donation From Vendor: ABILENE/M06005	- In SANDIEGOZ / 506347	Loan Out To GREENVISC/M15010 Out - 05/21/2015
05/21/2015	Loan In From Sender: SANDIEGOZ/506347 Vendor: SANDIEGOZ/506347	In - GREENVISC / M15010	- -
<b>Sex-Contraception:</b>	Female	<b>Birth Type:</b>	Captive Birth/Hatch
<b>Hybrid Status:</b>	False	<b>Birth Location:</b>	San Diego Zoo
<b>Enclosure:</b>	PR 4	<b>Birthdate - Age:</b>	12/03/2006 - 13Y,3M,20D
<b>Sire:</b>	26751812 (SANDIEGOZ / 504056)	<b>Dam:</b>	23049931 (SANDIEGOZ / 502193)

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### Note Retrieval Report

Use this Report to find a specific Keyword, word or text string in a Note or Observation. It can be searched by Animal or Enclosure.

The screenshot shows the 'Run Report' window with the following elements highlighted by numbered callouts:

- 1: Entity Type dropdown menu (set to 'Animal').
- 2: Taxonomy search field (set to 'Animalia / Animals').
- 3: Collections dropdown menu (set to 'Education Collection, Main Institution').
- 4: Report Start Date and Report End Date date pickers (set to 02/24/2020 and 03/24/2020).
- 5: Search For Text String (Within Selected Notes) fields with AND/OR radio buttons.
- 6: Keyword search field.
- 7: Note Types / Note Sub Types cascading dropdown menu.
- 8: Group By dropdown menu.
- 9: Include Provisional Data and Show Only Provisional Data checkboxes.

1. You can select Animal or Enclosure as the Entity Type
2. What you select for Entity Type will drive your choices here
  - If you selected Animals above, you can search by Taxonomy or one or more animals. You cannot use Animal Lists.
  - If you selected Enclosures above, you can search by one enclosure. You cannot use Enclosure Lists.
3. All collections are included by default but can be edited
4. Select the desired Date Range
5. Enter the Text you are looking for in these free text fields. If AND is selected ZIMS will find Text that matches both entries. If OR is selected ZIMS will find the Text for either or both entries. Partial entries will be found. For example, if you enter “ear”, ZIMS will also find “rear”.
6. You can search by Keyword
7. This is a multiple select cascading dropdown list that allows you to select at the Note Type level or down to specific Note Sub Types. At the bottom of the list of note types you will see the option to 'include obsolete records' to search for note types that are no longer active in ZIMS.
8. You can select how to Group the Report by Taxonomy, Local DI, GAN, Note Date and Note Type.
9. You have the option to include Provisional Data or display only Provisional Data.

The Report below is grouped by Local ID.

Date	Note Type / Sub Type / Keyword	Recorded By	Age At Date
<p>Report Start Date: Jan 01, 2019      <b>Note Retrieval Report For</b>      Report End Date: Oct 30, 2019                      Animalia / Animals</p>			
<p><b>HSV19-00145   Undetermined   Branta canadensis / Canada goose</b></p>			
Feb 02, 2019	Diet / Animal feed log detail / Notes on feeding the egg	Adrienne Miller	
<p><b>880029 / 25732974   Male   Phoenicopterus chilensis / Chilean flamingo</b></p>			
Mar 05, 2019	Animal Care / Medical Note (M) / Clinical Medical Summary Note Penguin did well during annual physical. Some respiratory issues may be developing. Watch for nasal discharge and bring to clinic if any is seen.	Adelaide Miller	33Y,6M,23D
<p><b>880212 / MIG12-29858192   Male   Symphalangus syndactylus / Siamang</b></p>			
Jan 09, 2019	Animal Care / Fecal Observation / This note added to the following animals: 880212, M14003, M17001, M15007  Score 1 -2 fecals found on exhibit and in holding den.	Keith Gilchrist	27Y,4M,24D
Jan 02, 2019	Animal Care / - / Loss of appetite -only nibbling at kale and biscuits, ignoring the fruit. Unusual for him.	Keith Gilchrist	27Y,4M,17D
Jan 02, 2019	Animal Care / Fecal Observation / This note added to the following animals: 880212, M14003, M17001, M15007  Quite a bit of Score 2 fecal found on exhibit today.	Keith Gilchrist	27Y,4M,17D
<p><b>A16017 / HSV16-00049   Female   Hyla versicolor / Grey tree frog</b></p>			
Jan 11, 2019	Animal Care / - / Radiographs	Keith Gilchrist	7Y,6M,27D
Jan 08, 2019	Animal Care / - / Physical exam. To be soaked every day UFN.	Keith Gilchrist	7Y,6M,24D
<p><b>A16018 / HSV16-00050   Male   Hyla versicolor / Grey tree frog</b></p>			
Jan 26, 2019	Animal Care / Weight Comment / Animal Weight Weight after fluid aspiration	Nick Kapustin	7Y,7M,11D
<p><b>B10012 / 4805733   Female   Cygnus atratus / Black swan</b></p>			
Jan 21, 2019	Reproduction / Egg Lay (SY) / This note added to the following animals: B13014, B10012  Laid 6th egg. Removed it. Nest contains 5 dummy eggs.	Keith Gilchrist	23Y,5M,24D
Jan 19, 2019	Reproduction / Egg Lay (SY) / This note added to the following animals: B13014, B10012  2 more eggs in nest - removed and replaced with dummies. There are now 5 dummy eggs in the nest.	Keith Gilchrist	23Y,5M,22D

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**Peak Holding Report**

This Report displays the highest number of a species held during a specified Date Range. In the United States this Report is often used to answer year-end reporting questions for USDA license.

1. Report Start Date field  
2. Report End Date field  
3. Taxonomy dropdown menu  
4. Collections dropdown menu  
5. Natural State dropdown menu  
6. Include Pre-Births checkbox  
7. Maximum column header  
8. Date column header

Taxonomy Name	Common Name	Natural State Type	Maximum	Date
Hadrurus arizonensis	Desert hairy scorpion	Wild	0.0.1 (1)	01/01/2020
Hadogenes troglodytes	Fiat rock scorpion	Wild	0.0.1 (1)	01/01/2020
Pandinus cavimanus	Redclawed emperor scorpion	Wild	0.0.1 (1)	01/01/2020
Pandinus imperator	Common emperor scorpion	Wild	0.0.9 (9)	03/18/2020
Brachypelma smithi	Red-kneed tarantula	Wild	0.1.0 (1)	01/01/2020
Brachypelma vagans	Redrumped tarantula	Wild	0.0.1 (1)	01/01/2020
Grammostola rosea	Chilean rose tarantula	Wild	0.2.7 (9)	01/01/2020
Pterinochilus murinus	Mombasa golden starburst tarantula	Wild	0.0.1 (1)	01/01/2020
Latrodectus mactans	Black widow spider	Wild	0.2.0 (2)	01/01/2020
Gromphadorhina	Madagascar hissing cockroach	Wild	0.0.80 (80)	01/01/2020
Gromphadorhina portentosa	Madagascar hissing cockroach	Wild	0.0.29 (29)	01/01/2020
Carausius morosus	Walkingstick	Wild	0.0.13 (13)	01/01/2020
Archispirostreptus	Giant African millipede	Wild	0.0.11 (11)	01/01/2020
Bufo marinus	OBSOLETE: Use Rhinella marina / Cane toad	Wild	0.0.1 (1)	01/01/2020
Phyllobates vittatus	Golfodulcean poison dart frog	Wild	4.9.2 (15)	01/01/2020
Hyla versicolor	Grey tree frog	Wild	1.1.0 (2)	01/01/2020
Macrochelys temminckii	Alligator snapping turtle	Wild	1.0.0 (1)	01/01/2020
Clemmys guttata	Spotted turtle	Wild	3.2.12 (17)	01/01/2020
Terrapene carolina	Eastern box turtle	Wild	1.1.0 (2)	01/01/2020
Trachemys scripta scripta	Yellow-bellied slider	Wild	0.2.0 (2)	01/01/2020

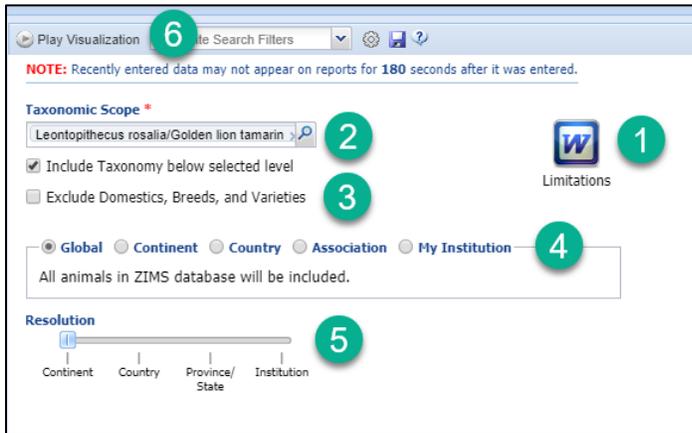
This Report does not have a collapsible filter grid; the Report displays directly below your filters.

- 1.The default Report Start Date is blank.
- 2.The default Report End Date is today.
- 3.Select the Taxonomy you want.
- 4.All Collections are included by default but can be edited
- 5.You can filter by Domestic or Wild. If left blank both will be displayed in the Report.
- 6.If you want to include fetuses and eggs, check this box.
- 7.The highest number of the species during the selected Date Range displays in this column.
- 8.The first date that the highest number was reached displays in this column.

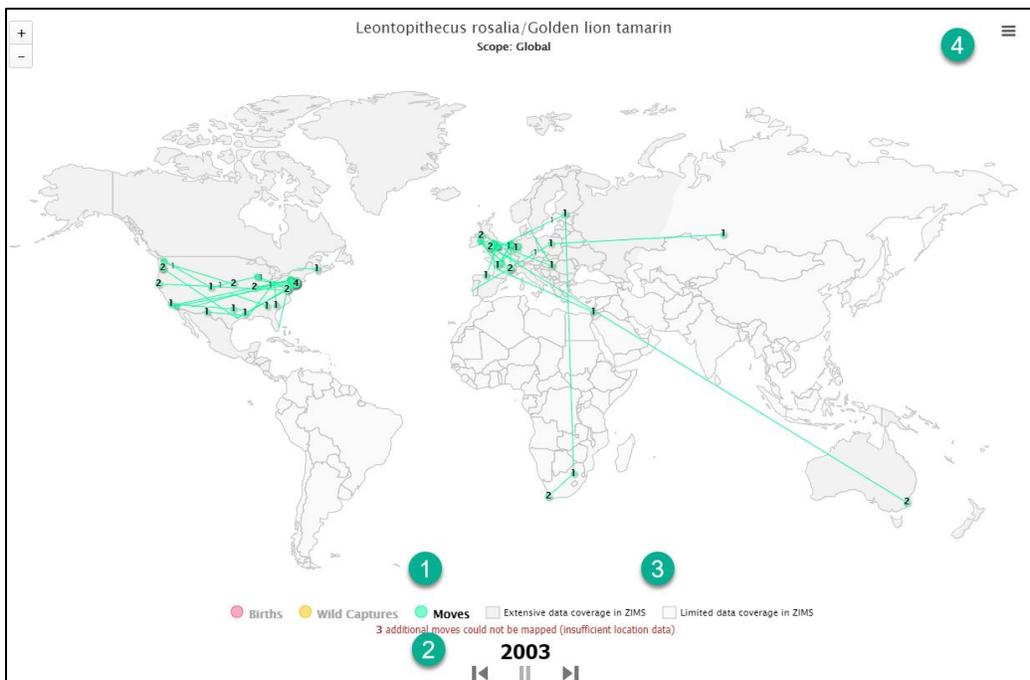
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### Species Event History

This is not really a Report but is an active visualization of Births/Hatches, Wild Captures and Moves.



1. Be sure to read the Limitations document so you understand why some data is not included in the visualization.
2. The Taxonomy must be at the Species or below.
3. You can opt to exclude Domestics, Breeds and Varieties.
4. You can select a scope of Global down to My Institution.
5. What you select for the scope above will influence what options you have for the Resolution.
6. When you are ready select Play Visualization.



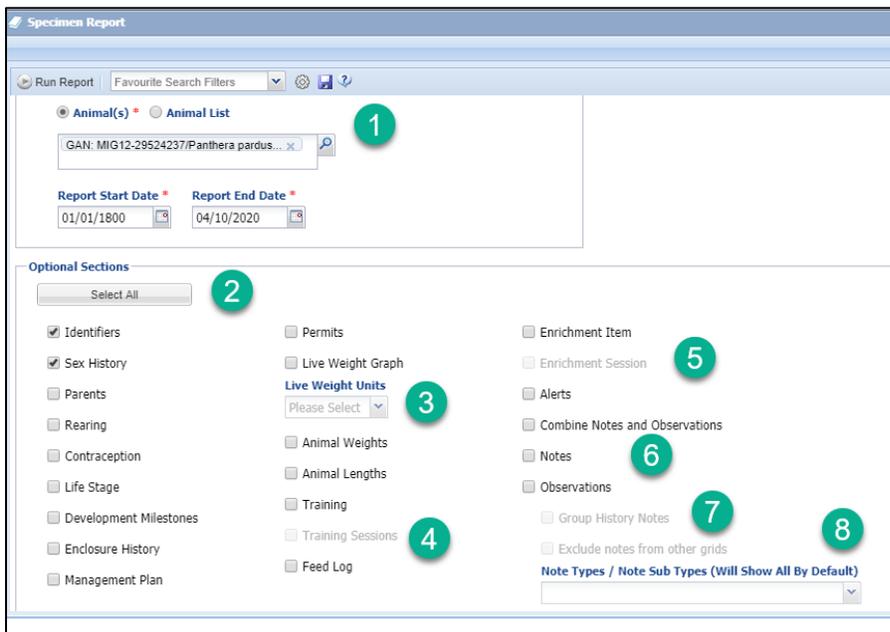
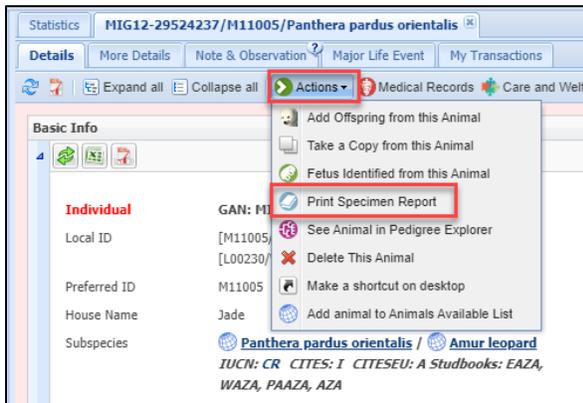
1. What is displayed on the screen is color coded. Here we are looking at Moves.
2. The year displays. You can go forward or backward using the left and right arrows.
3. The darker shaded areas of the Global map indicate extensive data coverage in ZIMS, the lighter areas indicate more limited data coverage in ZIMS.
4. You can download the graph to various formats using the hamburger icon.

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**Specimen Report**

A Report of a single individual or group record.

In addition to running a Specimen Report from the Start menu, you can run this Report from within the record under Details tab > Actions > Print Specimen Report.



- 1.You can select a single animal or multiple animals or you can run the Report for all animals in an Animal List.
- 2.Identifiers and Sex History are checked by default. To check all the options, choose Select All.
- 3.Live Weight Units is activated only if Live Weight Graph is checked.
- 4.Training Sessions is activated only if Training is checked.
- 5.Enrichment Session is activated only if Enrichment Item is checked.

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6, There are three options for how you want Notes and Observations to display.

- Combine Notes and Observations – they will be displayed together in chronological order. If this is checked the following options are not available.
- Notes – Notes will display in their separate list. If this is checked Combine Notes and Observations is not available.
- Observations – Observations will display in their separate list. If this is checked Combine Notes and Observations is not available.

7. Group History Notes and Exclude notes from other grids are activated only if Notes is checked.

8. All Note Types and Sub Types will display by default. To filter to specific ones, select them here.

Below is an example of a Specimen Report.

SPECIES  
360

## Specimen Report

**Species360** MIG12-29524237  
**GAN**  
 Panthera pardus orientalis  
**Studbooks** EAZA, WAZA, PAAZA, AZA  
**Order** Carnivora  
**IUCN** Critically Endangered (CR)  
**Start Date** 01/01/1800

**Local ID:** GREENVISC / M11005  
 Amur leopard  
**Family** Felidae  
**CITES** I  
**End Date** 04/10/2020

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**Basic Animal Information**

<b>Sex - Contraception</b>	Female -	<b>Status</b>	Alive
<b>Birthdate - Age</b>	03/17/2010 - 10Y,0M,24D	<b>Preferred ID</b>	GREENVISC / M11005
<b>Origin</b>	Potawatomi Zoo	<b>Rearing</b>	Parent
<b>Birth Type</b>	Captive Birth/Hatch	<b>Hybrid Status</b>	Not Hybrid
<b>Sire</b>	27862780 (SOUTHBEND / 27029)	<b>Dam</b>	MIG12-29767901 (SOUTHBEND / 23015)
<b>Current Collection</b>	Main Institution Animal Collection	<b>Collection Trip</b>	
<b>Clutch / Litter</b>		<b>Enclosure</b>	Amur Leopard

No Local Data Differences Found

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**Visit History**

Date in	Acquisition - Vendor/Local ID	Phy. Own	Reported By	Disposition - Recipient/Local ID	Phy. Own	Date Out
03/17/2010	Birth/Hatch	-	In WINNIPEG / L00230		-	
03/17/2010	Birth/Hatch Owner: WINNIPEG/L00230	In	- SOUTHBEND / 30008	Loan Transfer To GREENVISC/M11005	Out	03/30/2011
03/31/2011	Loan In From Sender: SOUTHBEND/30008 Vendor: WINNIPEG/L00230	In	- GREENVISC / M11005		-	

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**Identifiers**

Reported By	Effective Date	Type	Identifier	Location	Status	Comments
SOUTHBEND	09/06/2011	Regional Studbook Number	AZA/797		Active	Legacy SLocation: AZA Legacy Comment:
GREENVISC	08/30/2011	Intl Stdbk#	797		Active	
GREENVISC	03/31/2011	Local ID	M11005		Active	
SOUTHBEND	03/16/2011	Transponder	041*819*848		In-Use	Legacy SLocation: SHOULDERS Legacy Comment: AVID MICROCHIP
GREENVISC	03/16/2011	Transponder	041*819*848		In-Use	Legacy SLocation: shoulders Legacy Comment:
GREENVISC	03/16/2011	Tattoo	041*818*282		Active	
SOUTHBEND	12/02/2010	House Name	JADE		Active	
SOUTHBEND	05/06/2010	Transponder	041*818*282		In-Use	
SOUTHBEND	03/17/2010	Local ID	30008		Active	
GREENVISC	03/17/2010	House Name	Jade		Active	
GREENVISC	03/17/2010	Old Accession Number	30008		Active	
WINNIPEG	03/17/2010	Local ID	L00230		Active	

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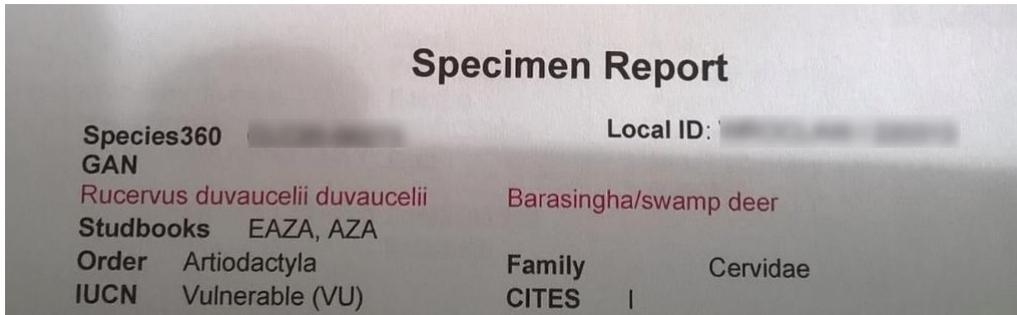
**Sex Information**

Reported By	Date	Sex	Comments
GREENVISC	03/31/2011	Female	
WINNIPEG	03/17/2010	Female	

The last grid in the Report displays Ancestry Information. Parents must be selected as a filter in order for this to show.

	GREENVISC	Yes	27862780 [SOUTHBEND / 27029]	Sire/100%	07/15/1996
	SOUTHBEND	Yes	MIG12-29767901 [SOUTHBEND / 23015]	Dam/100%	12/07/2001
	SOUTHBEND	Yes	27862780 [SOUTHBEND / 27029]	Sire/100%	07/15/1996
<b>Ancestry Information (calculated by Species360 from shared data)</b>					
	<b>% Pedigree Known</b>		<b>% Pedigree Certain</b>	<b>Taxonomic Inconsistencies</b>	<b>No. Identified Ancestors</b>
	87.50%		87.50%	No	54

When there is a Taxonomic Inconsistency in the pedigree for the animal in your report, the output will display the taxonomy in red:

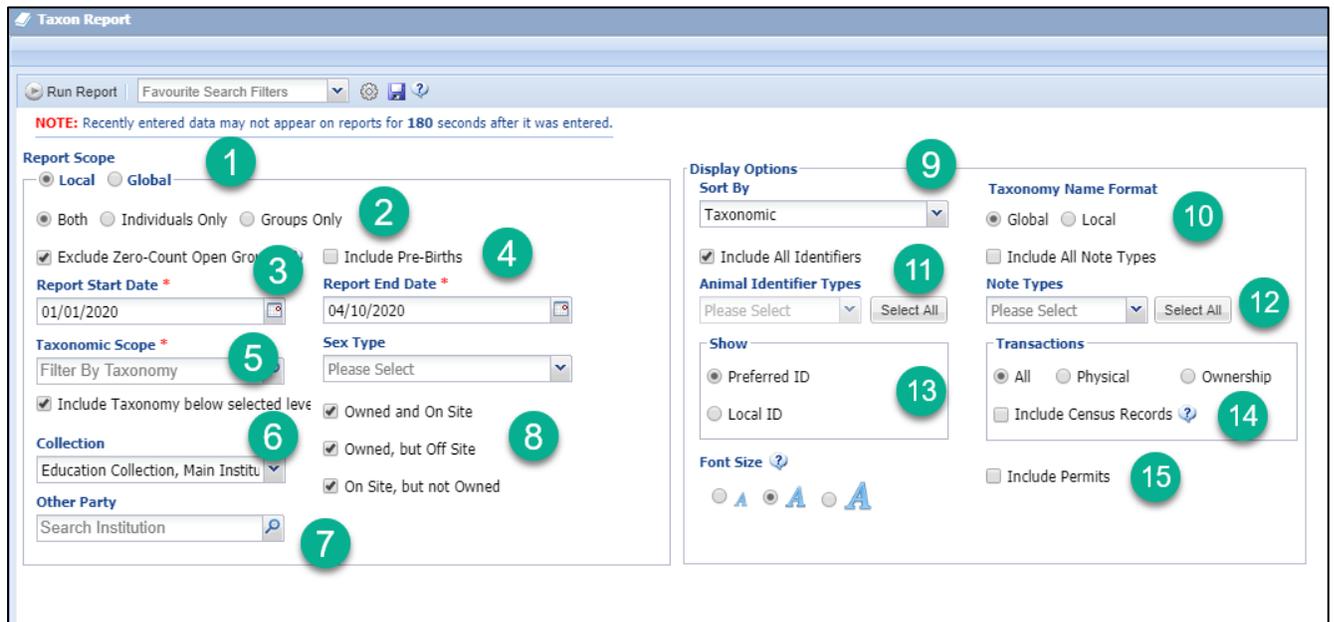


If the parental taxonomy of the selected animal differs, especially if the parents are not at the same holder, this can be difficult to determine. Using the [pedigree explorer](#) and [taxonomic inconsistency](#) tools can help identify the conflict.

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### Taxon Report

A Report for a single taxon, often including the taxon below the specified taxon.



1. This is one of the few reports that you can run at the Local or Global level.
2. Running the Report for both Individuals and Groups is the default, but you can select to run for one or the other.
3. By default zero-count group records will be included, uncheck this if you don't want to see them.
4. Check this box if you want to include fetuses or eggs.
5. Including Taxonomy below the select taxa is checked by default.
6. All Collections are included by default but they can be unchecked.

7. Other Party displays only when Local scope is selected. This will filter the Report to include only the institution recorded here.
8. All physical and ownership options are checked by default but can be unchecked.
9. You can select to sort the Report by Taxonomy, GAN, Local/Preferred ID or Birth Date.
10. You can select to show the Global or the Local taxonomy name.
11. All Identifiers are included by default but you can uncheck this box and select specific ones.
12. You can select to include some or all Notes and Observations.
13. Displaying the Preferred ID is checked by default.
14. All transactions are included by default but you can filter the Report by Physical or Ownership.
15. Permit information can also be included in the Report.

The screenshot shows the 'Run Report' interface. At the top, there is a 'Run Report' button and a 'Favourite Search Filters' dropdown. Below this is a red 'NOTE' stating 'Recently entered data may not appear on report'. The 'Report Scope' section has radio buttons for 'Local', 'Global', 'Both', 'Individuals Only', and 'Groups Only'. The 'Global' option is selected and marked with a green circle containing the number '1'. There are also checkboxes for 'Exclude Zero-Count Open Groups' and 'Include Taxonomy below selected level'. The 'Report Start Date' is set to '01/01/2020'. The 'Taxonomic Scope' is set to 'Panthera pardus/Leopard'. Below this, there are two search fields: 'Recipient' and 'Vendor', both labeled 'Search Institution'. The 'Vendor' field is marked with a green circle containing the number '2'.

1. If you select a Global scope...  
2. The Other Party field is replaced with Recipient (who received the animal) and Vendor (who sent the animal) fields.

Below is an example of a Taxon Report. The number of animals in the Report displays at the bottom next to the Print button.

Report Start Date 01/01/2020		Taxon Report <i>Panthera pardus</i>				Report End Date 04/10/2020		SPECIES 360	
<b>MIG12-29524237   Local ID: M11005</b>									
Individual		Amur leopard			Critically Endangered (CR)			Panthera pardus orientalis	
Date in	Acquisition - Vendor/Local ID	Phy	Own	Reported By	Disposition - Recipient/Local ID	Phy	Own	Date out	
03/17/2010	Birth/Hatch	-	In	WINNIPEG / L00230	-	-	-	-	-
03/17/2010	Birth/Hatch Owner: WINNIPEG/L00230	In	-	SOUTHBEND / 30008	Loan Transfer To GREENVISC/M11005	Out	-	03/30/2011	
03/31/2011	Loan In From Sender: SOUTHBEND/30008 Vendor: WINNIPEG/L00230	In	-	GREENVISC / M11005	-	-	-	-	
<b>Sex/Contraception</b>	Female / -			<b>Birth Type</b>	Captive Birth/Hatch				
<b>Hybrid Status</b>	Not a hybrid			<b>Birth Location</b>	Potawatomi Zoo				
<b>Enclosure</b>	Amur Leopard			<b>Birth Date/Age</b>	03/17/2010 / 10Y,0M,24D				
<b>Rearing</b>	Parent			<b>House Name</b>	[JADE/SOUTHBEND] [Jade/GREENVISC]				
<b>Dam</b>	[GAN: MIG12-29767901   SOUTHBEND / 23015]			<b>Intl Stdbk#</b>	[797/GREENVISC]				
<b>Sire</b>	[GAN: 27862780   SOUTHBEND / 27029]			<b>Local ID</b>	[30008/SOUTHBEND] [L00230/WINNIPEG] [M11005/GREENVISC]				
				<b>Old Accession Number</b>	[30008/GREENVISC]				
				<b>Regional Studbook #</b>	[797-AZA /SOUTHBEND]				
				<b>Tattoo</b>	[041*818*282/GREENVISC]				
				<b>Transponder</b>	[041*818*282/SOUTHBEND] [041*819*848/SOUTHBEND] [041*819*848/GREENVISC]				
<b>MIG12-28443030   Local ID: M16031</b>									
Individual		Amur leopard			Critically Endangered (CR)			Panthera pardus orientalis	
Date in	Acquisition - Vendor/Local ID	Phy	Own	Reported By	Disposition - Recipient/Local ID	Phy	Own	Date out	
04/14/2006	Birth/Hatch	In	In	MULHOUSE / M06041	Donation To BERLIN TP/M03732	Out	Out	06/13/2007	
06/14/2007	Donation From MULHOUSE/M06041	In	In	BERLIN TP / M03732	Loan Out To HOYERSWER/UNK	Out	-	05/20/2015	
05/20/2015	Loan In From Sender: BERLIN TP/M03732 Vendor: BERLIN TP/M03732	In	-	HOYERSWER / AMLEO1	Loan Return To Owner BERLIN TP/M03732	Out	-	10/13/2016	
10/13/2016	Loan Return to Us Sender: HOYERSWER/AMLEO1	In	-	BERLIN TP / M03732	Donation To GREENVISC/M16031	Out	Out	11/17/2016	
11/17/2016	Donation From BERLIN TP/M03732	In	In	GREENVISC / M16031	-	-	-	-	
<b>Sex/Contraception</b>	Male / -			<b>Birth Type</b>	Captive Birth/Hatch				
<b>Hybrid Status</b>	Not a hybrid			<b>Birth Location</b>	Parc Zoologique Et Botanique Mulhouse				
<b>Enclosure</b>	Amur Leopard			<b>Birth Date/Age</b>	04/14/2006 / 13Y,11M,27D				
<b>Rearing</b>	Parent			<b>House Name</b>	[Nelkan/BERLIN TP] [NELKAN/MULHOUSE]				
<b>Dam</b>	[UNK / MULHOUSE] [GAN: 11197852   M04121/MULHOUSE]			<b>Intl Stdbk#</b>	[657/MULHOUSE]				
<b>Sire</b>	[UNK / MULHOUSE] [GAN: 7734636   M03114/MULHOUSE]			<b>Local ID</b>	[AMLEO1/HOYERSWER] [M03732/BERLIN TP] [M06041/MULHOUSE] [M16031/GREENVISC]				
				<b>Transponder</b>	[25022-96000-15815/BERLIN TP] [00078AD14E/(Cervical area (neck)-)/GREENVISC] [250 229 600 015 815/MULHOUSE]				
04/10/2020 Greenville Zoo									
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### Transaction Report

Acquisitions and Dispositions (including Birth/Hatches and Deaths) over a specified date range.

The screenshot shows the 'Transaction Report' 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 interface is divided into several sections:

- Scope (1):** Includes radio buttons for 'All', 'Individuals Only', and 'Groups Only'. A checkbox for 'Include Pre-Births' (2) is present. There are input fields for 'Report Start Date' (01/01/2020) and 'Report End Date' (04/10/2020). A dropdown for 'Taxonomic Scope' is set to 'Animalia / Animals'. A checkbox for 'Include taxonomy below' (4) is checked. There is a search field for 'Specific Party' (4) and a dropdown for 'Collections' (5) set to 'Education Collection, Main Institu'. A 'Subset' section has radio buttons for 'None' (6), 'Country', and 'Continent'.
- Transaction Filter (9):** Has radio buttons for 'Basic' and 'Advanced'. Under 'Term', there are three radio button options: 'All physical, ownership, and partial group transactions', 'All physical transactions', and 'All ownership transactions'. Under 'Transaction Type' (10), there are four checked checkboxes: 'Births', 'Deaths', 'Acquisitions (Excluding Births)', and 'Dispositions (Excluding Deaths)'.
- Display Options (7):** Includes a 'Sort By' dropdown set to 'Common Name' and a 'Show' section with radio buttons for 'Preferred ID' (8) and 'Local ID'.

- 1.Both individuals and groups are included by default but you can filter by one or the other.
- 2.Fetuses and eggs are excluded by default but can be added.
- 3.You can select transactions for a specific Enclosure, but only one.
- 4.You can filter by transactions with a specific institution.
- 5.All Collections are included by default but can be filtered.
- 6.No scope is selected by default but you can select to view only transactions with a specific Country or Continent.
- 7.You can sort the Report by GAN, Local ID/Preferred ID, Transaction Type, Taxonomy, Common Name, Date and Other Party.
- 8.You can select to show the Preferred ID (default) or the Local ID.
- 9.Basic Filter is the default and it includes all variations for the selected transaction Terms. See below for Advanced Filter.
- 10.All are checked by default but you can filter by Transaction Types.

**Transaction Filter**

Basic  Advanced

**Death in Transit**

All transactions (excluding Death in Transits) ▼

- Birth
  - Birth/Hatch
    - Birth Event
    - Hatch Event(Egg Mass)
    - Hatch Event(Egg)
    - Hatch Event(Group Of Eggs)
  - Acquisition
  - Disposition
  - Death
  - Partial Group Transactions
  - Reported Holder
  - Reported Owner
  - Split/Merge

If the Advanced Filter is selected, A multiple select cascading dropdown allows you to filter by more specific transaction types.

Below is an example of a Transaction Report.

Preferred ID	GAN	Sex	Age at Date	Date	Transaction	Vendor/Recipient	Vendor ID
<b>Blue-winged kookaburra</b>				<b>Dacelo leachii</b>			
28	HSV20-00164	Undetermined	0Y,0M,0D	03/01/2020	Birth/Hatch		
31	HSV20-00167	Undetermined	0Y,0M,0D	03/01/2020	Birth/Hatch		
<b>Buru babirusa</b>				<b>Babyrousa babyrussa</b>			
25	HSV20-00161	Female	0Y,3M,29D	01/01/2020	Donation From	PUBLIC	UNDETERMINED
<b>Cheetah</b>				<b>Acinonyx jubatus</b>			
30	HSV20-00166	Female	0Y,0M,0D	01/01/2020	Birth/Hatch		
<b>Chihuahua</b>				<b>Canis lupus familiaris chihuahua</b>			
33	HSV20-00169	0.0.6	0Y,1M,0D	03/01/2020	Appeared +[0.0.6]		
34	HSV20-00170	0.0.6	0Y,1M,0D	03/01/2020	Appeared +[0.0.6]		
34	HSV20-00170	0.0.6	0Y,1M,14D	03/15/2020	Loan Out To - [0.0.6]	TOLEDO	Undetermined
<b>Common emperor scorpion</b>				<b>Pandinus imperator</b>			
35	HSV20-00171	0.0.6	N/A	02/04/2020	Appeared +[0.0.6]		
<b>Flat rock scorpion</b>				<b>Hadogenes troglodytes</b>			
115036	HSV15-01886	Undetermined	5Y,2M,0D	03/01/2020	Donation To	PUBLIC	Undetermined
<b>Hooded merganser</b>				<b>Lophodytes cucullatus</b>			
26	HSV20-00162	Undetermined	0Y,0M,9D	02/04/2020	Appeared		
B15029	HSV15-01879	Male	4Y,8M,15D	02/01/2020	Death		
<b>Komodo dragon/Ora</b>				<b>Varanus komodoensis</b>			
24	HSV20-00160	Female	0Y,0M,5D	01/03/2020	Donation From	PUBLIC	UNDETERMINED
<b>Northwest Bornean orangutan</b>				<b>Pongo pygmaeus pygmaeus</b>			
XFG001	25207382	Male	14Y,0M,9D	02/01/2020	Loan Return to Us	PORTLAND	B40236
<b>Red panda</b>				<b>Ailurus fulgens fulgens</b>			
27	HSV20-00163	Undetermined	0Y,0M,0D	03/01/2020	Birth/Hatch		
<b>Tawny frogmouth</b>				<b>Podargus strigoides</b>			
32	HSV20-00168	Undetermined	0Y,0M,0D	03/01/2020	Birth/Hatch		

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(Brackets display # acquired or dispositioned from group.)

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**Wild Acquisitions Report**

This Report captures all animals Collected From Wild during a specified date range.

- 1.The Report can be sorted by Collection Method, Common Name, Date, Location (capture), Permit, Staff, Taxonomy and Water Type.
- 2.You can select to display the GAN, Local ID or Preferred ID
- 3.All variations of Collected From Wild are checked by default but these can be further filtered.
- 4.You can run the Report for a specified Location.
- 5.The Water Type is a multiple select dropdown of water types.
- 6.The Collection Method is a multiple select dropdown.
- 7.The Permit selection is a multiple select dropdown sourced from your Permit list in My Institution.

Below is an example of a Wild Acquisitions Report.

Report Start Date	Wild Acquisitions Report		Report End Date	SPECIES 360
01/01/2014	Animalia / Animals	04/10/2020		
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<b>R14001</b>	<b>Timber rattlesnake / <i>Crotalus horridus</i></b>			<b>Individual</b>
Date	Location	Water Type	Method	Number
05/22/2014	United States / North South Carolina /		Trap - pit	0.0.1
<b>M14002</b>	<b>Bobcat / <i>Lynx rufus</i></b>			<b>Individual</b>
Date	Location	Water Type	Method	Number
05/23/2014	United States / South Carolina /		Trap - cage	0.1.0
				Keith Gilchrist
<b>I14004</b>	<b>Black widow spider / <i>Latrodectus mactans</i></b>			<b>Individual</b>
Date	Location	Water Type	Method	Number
06/28/2014			Net - hand	0.1.0
<b>R14002</b>	<b>Rough greensnake / <i>Opheodrys aestivus</i></b>			<b>Individual</b>
Date	Location	Water Type	Method	Number
10/15/2014	North America / United States / Southeast South Carolina / Piedmont		Hand catch	0.0.1

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*Revised 11 July 2024*