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## CHEAT SHEET FOR ZIMS STUDBOOKS TNT

A guided walkthrough of ZIMS for Studbooks.

[Contact Species360 Support](#)

\_\_\_ Go to [studbooks.species360.org](http://studbooks.species360.org). (Instruct to go to [ZIMS.species360.org](http://ZIMS.species360.org))

\_\_\_ Log In. Assigned by Local Admin.

\_\_\_ Can change under My Preferences.

\_\_\_ If non-ZIMS institution Global Admin assigns.

\_\_\_ To find your studbooks go to Start > Studbook > Studbooks. Drag to Desktop.

\_\_\_ You will log out under the Start menu

\_\_\_ This will open your main dashboard

- Living Animals – current animals in studbook
- Animal Records with Updates – current studbook records that have updates entered in the Husbandry module
- Suggested Animals – New animals recorded in the Husbandry module that you may want to have in your studbook. New Births/Hatches.  
Animals from non-ZIMS institutions

\_\_\_ Selecting the studbook opens that dashboard. View List of Living Animals, All Animals, Suggested Animals and Pending Updates. Data Quality by Priority

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- Studbook Activity on right. What has recently been entered in the studbook. Hyperlink into record. If any IDs entered in Husbandry display in yellow.
  - Overview on left. Open and discuss. This is where you can change Studbook Number Settings. Some regions do not encourage the use of Temporary Studbook Numbers, check with your Regional Association.
  - Institutions on left. Open. All, Local, Current and Historic
  - Use breadcrumbs to go back.
  - Select View List Living Animals. Activates left hand dashboard topics. Can change sorting of columns and columns displayed. Adjust column order.
  - Drop down arrow activates list filter screen. Show some filters.
  - Check Show History. Open a few records. Fewer than 15 results can use Expand All.
  - If Show History, exports to Excel or pdf will display the history. Replaces Studbook Report.
  - Select ID hyperlink to open record. Can open grids one at a time. Can expand and collapse all. Open as expanded option in My Preferences. Start > My Preferences > Module Boxes.
  - Each grid exported or entire record exported under Actions menu
  - Show Animal Activity. Show Compare. Show Pedigree
  - Add New Animal to Studbook. Five grids completed before save as Full Studbook, otherwise saved as Draft. Transaction stream MUST start with a Birth/Hatch. Use the plus sign to add. Show is the only option. As grids completed will change to green.

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- \_\_\_Left Dashboard > My Animals > Show Drafts. Open a Draft and complete. Auto assignment of next available Studbook ID.
  - \_\_\_Go back to studbook. View List Suggested Animals. Animals entered into Husbandry but not yet found in your studbook. Scroll down to find Possible Matches. GAN and Matches are hyperlinks into the records.
  - \_\_\_Select a GAN with a match. Can link the records, New Animal, Reject or Manually link. Select New Animal
  - \_\_\_Show options in the “?”. If at only one institution can Accept All records.
  - \_\_\_Show View Rejected Animal button
  - \_\_\_View Husbandry Data Fix Report shows list of changes to Husbandry that may affect your studbook such as record merges, splits or deletions
  - \_\_\_Back to dashboard. Pending Updates. Changes made to records already in the studbook. Search by specific topics or filter the list (open filter)
  - \_\_\_Open record with updates. Number shows at top and in grids. Grid will be auto expanded if there is an update. Show actions available. If accept will move into the studbook with a checkmark on institution side. If rejected will remain on institution side with a circle and cross mark.
  - \_\_\_You will not get updates on animals held I groups in Husbandry or non-ZIMS members.
  - \_\_\_Identifiers auto-populate
  - \_\_\_Back to dashboard. Can search animals by GAN or studbook ID. Type in 1007

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—Back to dashboard. Can pin animals. Pin one and show in left My Animals. To unpin select the pin. Also where you can find recent records you have been in.

—Select Data Quality Displays by High, Medium or Low. Show hover over “?” for how to fix. Link in Help menu for the codes and how to fix them. Show.

—Under Tools in the left hand dashboard you find the studbook tools and reports.

—Census Report provides a yearly count taken on a specified day. Can filter by or exclude institutions. Default will exclude animals with undetermined transaction dates.

—Export to PMX used by Population Managers. If needed, contact RA.

—If studbook was migrated, the Data Validation Report compares data in the legacy systems (SPARKS or PopLink). Usually the numbers should match 0065cept in 2 circumstances. ZIMS requires an initial transaction of a birth/hatch. If you migrated animals with initial transactions of any other type the ZIMS numbers will be higher for birth/hatch. If you migrated any geographic areas that were entered as Institutions the counts for these will be different.

If counts are different for anything else contact support.

—The Location Validation Report lets you know how any geographic locations you entered as institutions are mapped.

—Animal Comparison is found here as well as from within the record.

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—Renumber Temporary IDs is an easy way to assign true studbook numbers. Check with your Regional Association as some do not want you to use Temporary IDs at all. You can generate All, generate individually or manually assign.

—MULT list is an easy way to see any multiple parents you may have created and the records they are found in.

—Institutional Holdings display the current and historic holdings by institution with links into the records. Columns can be sorted.

—The Pedigree Reports are found here as well as within the record. Unknown Pedigree is only found here. This provides a list where one or more parents are recorded as Undetermined.

—Click on the 'hyperlink GAN' to go to husbandry view.

—Don't forget to use the Help Menu to get instant help. Show Studbook Topics.

—If you have a good idea go to Start > Suggest Features or use the Suggest Features button.

***Revised 21 May 2020***