

## PROVISIONAL DATA ENTRY REPORTING

How to use Provisional Data Entry and where can unapproved data appear on reports.

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

Topics:

[Enabling and Granting Access via Provisional Roles](#)

[Use Case](#)

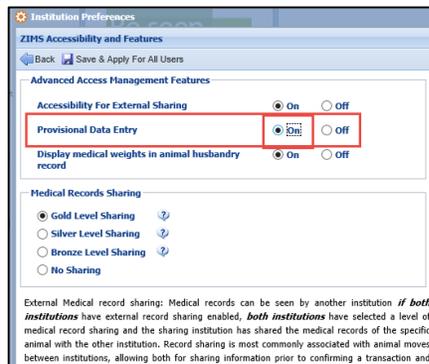
[Approve, Edit, or Reject Provisional Entries](#)

[Business Rules](#)

[Changes in 2025](#)

### Granting Access

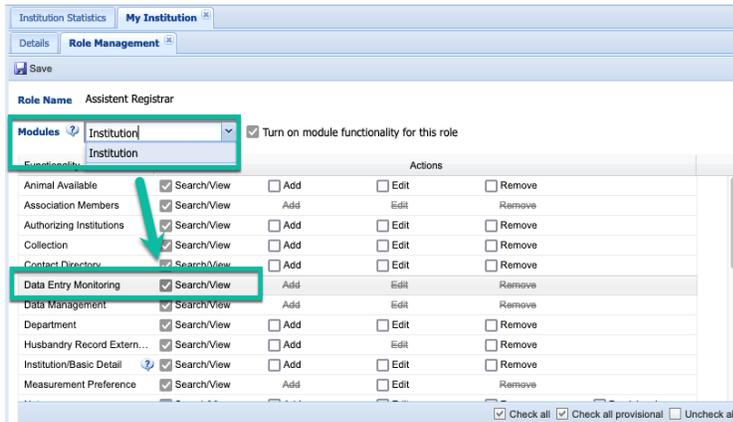
The Species360 Global Admin must first turn on the functionality for Provisional Data entry. The institution on the left below has not yet had it turned on. The Institution on the right below has had it turned on. The Local Admin then needs to complete the activation by selecting the “On” radio button. Remember to Save & Apply For All Users” (the only Save option).



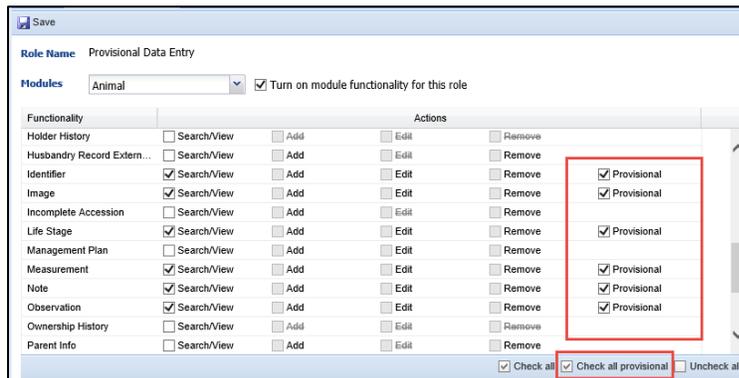
Provisional Data has not been added to any of the Species360 Template Roles. You can adjust a custom Role already created to include it, or create a new Role, whatever works best.

To review/approve/reject provisionally added data a user must be granted access to the Data Entry Monitor (DEM) – to add this to a role, DEM is listed under the Institution Module:

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If Provisional access is granted to a user’s role, then the ability to Add/Edit or Remove are unchecked by default because they are controlled by the Provisional access. The same Role can have a mix of Provisional and Standard access for data entry. **Search/View Basic Details** for all modules will need to be checked even if only Provisional Data is allowed.



### Use Case

The typical scenario for using Provisional Data is Keepers/Aquarists doing their own data entry and Registrars then viewing and accepting or rejecting for final entry into the ZIMS database. It includes a Daily Report as well as the ability to include or exclude Provisional Data on some other reports.

Below, a keeper with Provisional Data entry access entered two pieces of information on an Amur leopard – a Tattoo and a Weight. There are two indicators that this is a Provisional Data entry. Primarily, the record is greyed out. In addition, some records display a “?” that when hovered over displays “Provisional record”. At this point the Provisional User can go back into the record and Edit or Delete their entry.

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Date	Measurement	Value	Measured By	Extended Weights	Reported By
May 26, 2020	Live weight	50 Kilogram			GREENVISC
May 01, 2020	Live weight	52.5 Kilogram			GREENVISC
May 06, 2019	Live weight	51.4 Kilogram			GREENVISC
Mar 06, 2019	Live weight	54.0 Kilogram			GREENVISC
Nov 26, 2018	Live weight	58.0 Kilogram			GREENVISC
Jan 18, 2018	Live weight	47.8 Kilogram			GREENVISC
Mar 21, 2017	Live weight	41.0 Kilogram			GREENVISC
Feb 21, 2017	Live weight	41.2 Kilogram			GREENVISC

### Approve, Edit or Reject Provisional Entries

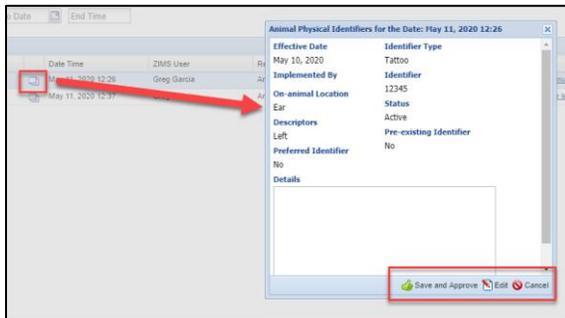
As of May 2025, Provisional Data Entries can be approved, edited, or rejected/deleted from two areas in ZIMS: Data Entry Monitoring and Daily Activity. Please make sure to check both areas to ensure all provisional records at your institution are reviewed. Use [this spreadsheet](#) to track which record types are approved in each area.

### Data Entry Monitoring Route

In Data Entry Monitoring you have the option to Approve, Edit, or Reject entries. To Approve, Edit or Reject Provisional entries, go to Start > Security Tools > Data Entry Monitoring. Selecting the Provisional Records tab opens up four additional tabs. The Pending tab brings up a search screen and a list of what Provisional Records need to be addressed. Provisional records will be available here until they have been Approved or Rejected. We see the two that the keeper entered on the leopard. Using Data Entry Monitoring for Provisional records is a “roll forward” process. If you approve the entry it will roll forward and become a permanent entry in ZIMS.

Date/Time	ZIMS User	Record Type	Details
May 11, 2020 12:26	Greg Garcia	Animal Physical Identifiers	Added Physical Identifier record for Animal: M18031 / Amur leopard / MID12-28443030
May 11, 2020 11:15	Greg Garcia	Animal Weights	Added Animal Weights record for Animal: M18031 / Amur leopard / MID12-28443030

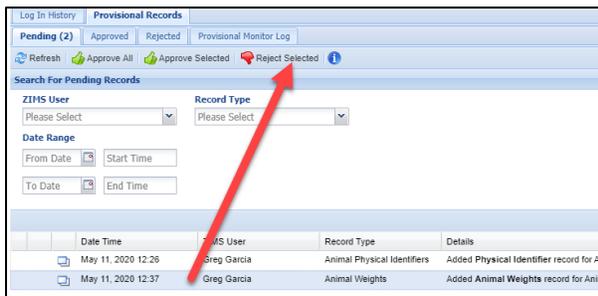
Selecting the View Details icon pops up a view screen for what was entered. You can Save and Approve the record, or select to Edit the entry and then Save and Approve it from that screen. Once Approved the data will no longer display as Provisional in the record and the Provisional User who recorded it can no longer edit or delete it.



You look at the details for the animal weight and find the weight was recorded in grams when it should have been kilograms. You have three options:

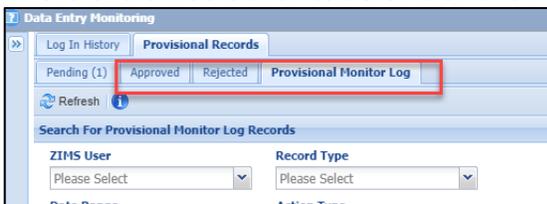
- Edit and Approve the corrected record
- Reject the record and ask the User to re-enter it correctly
- Ask the User to fix the record and Approve it once corrected

You choose to Reject the record. A Rejected record will be removed from the grid where it was recorded.



If a Provisional User chooses to 'undo' a record (pop up in the lower left hand corner after Save is selected) right after they entered it, it will appear in the 'Rejected' tab in the Data Entry Monitor. It will be noted as an entry and a rejection by the same staff person. If they delete an entry prior to Approval, the entry will be deleted in the record and will not display in the Rejected tab or in the Pending list.

There are three other tabs under the Provisional Records tab.



- Approved records will remain in the Approved tab for 90 days after Approval
- Rejected records will remain in the Rejected tab for 90 days after Rejection

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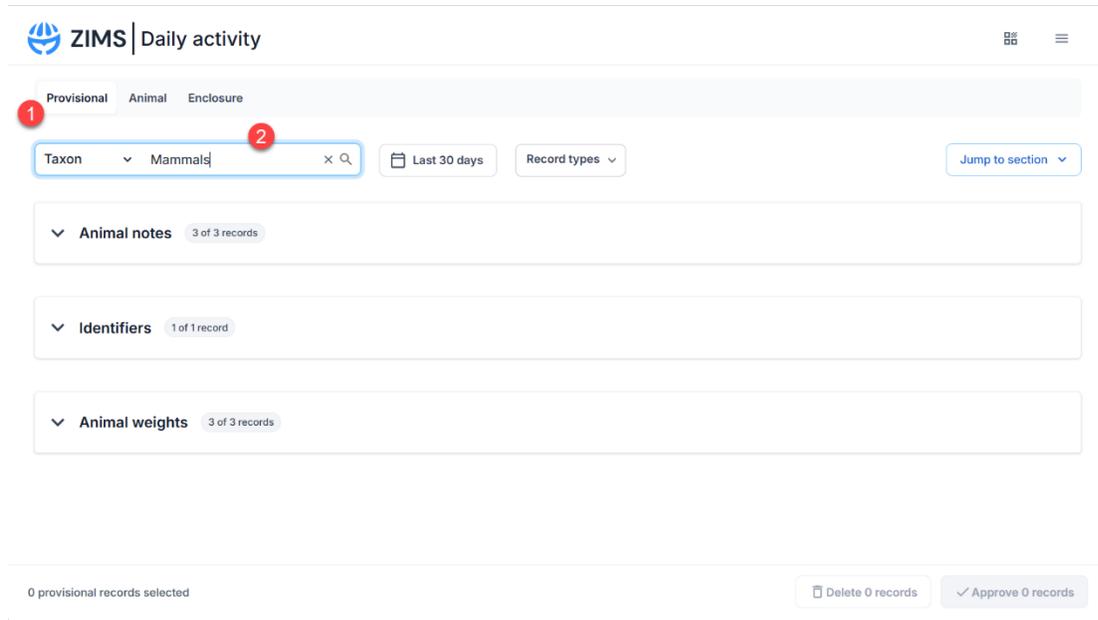
- If you edit a Provisional record and then Approve it, ZIMS saves the original record in the Approved tab and the edited version in regular Data Entry Monitoring
- The Provisional Monitor Log saves the last Provisional entries and edits for 90 days

### Daily Activity Route

In Daily Activity, you can Approve, Edit, or Delete provisional records. Deleted records cannot be recovered, and edited or approved records simply become part of your permanent records.

To access provisional entries, go to Start > New Features > Daily Activity.

1. Click the Provisional tab to view all unfiltered entries.
2. Use the filters to narrow down results if needed. Leaving filters empty will show all available provisional records.



To approve, delete or edit records:

1. Tick the checkbox next to each entry you want to action.
2. **OR** To select all records in a section (e.g., all Animal Weights), tick the checkbox at the top of that grid.
3. Click Approve or Delete.
4. To edit a record click 'Edit' next to the entry,

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Taxon Search for a taxon Last 30 days Record types Jump to section

Animal notes 10 of 10 records

Identifiers 1 of 1 record

Animal weights 3 of 3 records

Animal	Census	Recorded date	Type	Value	Change	Recorded by / Measured by	Enclosure
<input checked="" type="checkbox"/> TUNDRA / GULO3 Wolverine / <i>Gulo gulo</i>	0.1.0	22/05/2025	Live weight	13.4 kg	—	Provisional Data User Provisional Data User	Species360
<input checked="" type="checkbox"/> KODA / GULO2 Wolverine / <i>Gulo gulo</i>	0.1.0	22/05/2025	Live weight	12.45 kg	—	Provisional Data User Provisional Data User	Species360
<input type="checkbox"/> Mickey / TESTAUTO1 House mouse / <i>Mus musculus</i>	1.0.0	22/05/2025	Live weight	40 kg	—	Provisional Data User	Nicole's Test...

2 provisional records selected

Delete 2 records Approve 2 records

- In the 'Edit record' area, make your changes.
- Click Save & Approve.

Taxon Search for a taxon Record types

Animal notes 10 of 10 records

Identifiers 1 of 1 record

Animal weights 3 of 3 records

Animal	Census	Recorded date	Type	Value	Change	Recorded by / Measured by	Enclosure
<input type="checkbox"/> TUNDRA / GULO3 Wolverine / <i>Gulo gulo</i>	0.1.0	22/05/2025	Live weight	13.4 kg	—	Provis Provis	
<input type="checkbox"/> KODA / GULO2 Wolverine / <i>Gulo gulo</i>	0.1.0	22/05/2025	Live weight	12.45 kg	—	Provis Provis	
<input type="checkbox"/> Mickey / TESTAUTO1 House mouse / <i>Mus musculus</i>	1.0.0	22/05/2025	Live weight	40 kg	—	Provis	

0 provisional records selected

**Edit record** X

Mickey / TESTAUTO1 1.0.0  
House mouse / *Mus musculus*

**Weight**

Date: 21/05/2025

Type: Live weight

Measurement: 40 g  Estimated

Quality: Select quality

Exclude from norms

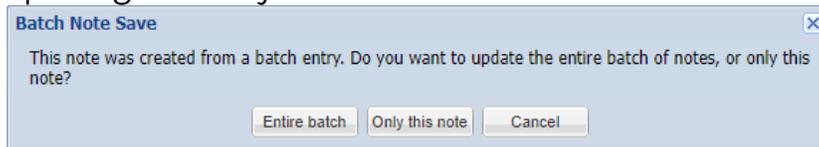
Equipment

Cancel Save & approve

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## Business rules

- Provisional Users can edit other Provisional data but not Approved/non-Provisional entries.
- Users with normal rights (non-Provisional) cannot edit Provisional data entries except in Data Entry Monitoring (if you have access).
- Any user granted Data Entry Monitoring access is allowed the rights to review/edit/reject provisional and non-provisional data entries made by all users.
- Provisional entries must be Approved before they can be edited by Users with normal rights.
- Entries created in batch (where single entry for all Users is selected) can be edited from the Pending tab (in the Data Entry Monitor) before approving. In ZIMS these 'batch transactions' are considered one single entry and each sub-record created cannot be modified separately before approval (except Notes – see below). Batch entries where a custom entry for each is selected can be provisionally edited as these are unique transactions in ZIMS.
- Notes entered provisionally as a batch can be edited from the notes and observation screen by a provisional user, either applying the edit to the entire batch or by splitting one entry from the batch.



- Entries made on Enclosures where 'include in enclosure occupant' option is selected behave like Batch transaction (single entry for all users) and cannot be edited before approval.
- Provisional Data Entry is available in the following modules:
  - Animal
  - Care and Welfare
  - Enclosure
  - Calendar
  - Life Support
  - Treatment Administration and Aquatic Enclosure Prescription in the Medical module.
- Provisional rights to Transponder assignments are not provided at this time because the access to create and assign Transponders is given through the Institution module. You can allow staff to provisionally enter other Identifiers and directly enter Transponders into the transponder inventory if you want.
- Reporting on provisionally flagged data (unapproved records) can be selected as options on the following reports: Daily Report, Note Retrieval Report, Activity and Enclosure Activity Reports. [More information on reports here.](#)

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## April 2025 - Are you ready for the changes in provisional?

We have some good news – and an **important update for you!** As part of ongoing work to modernize the Species360 Zoological Information Management System (ZIMS) and deliver new features, we are making it faster and easier to enter and approve provisional data records. However, as part of this process and in order to streamline the process for those approving provisional data, we are **reducing the number of provisional record types.**

We know that data quality and user experience go hand in hand. This especially applies to provisional data records, which are temporary or incomplete entries that require further verification before they become part of the official dataset. These records are typically used for:

- **Data quality management.** Registrars review data that is entered in ZIMS by their staff to ensure data quality and accuracy in their collection's records.
- **On-boarding new staff.** As new staff members begin direct data entry into ZIMS, it is a learning process for them to follow their institution's guidelines for record keeping. Using provisional data entry allows them to record data in a safe manner that does not affect the permanent records in the collection.

Once validated, provisional records are either confirmed and made permanent or corrected/deleted if errors are found. This feature ensures data accuracy and reliability while allowing zoos and aquariums to keep track of ongoing updates in real-time.

**As of 30 April we will remove several provisional record types that are not often utilized.**

### What to Know:

- To streamline the process for those approving provisional data, we are reducing the number of provisional record types.
- These are record types that metrics show are seldom or never used by those in a provisional data entry role, and we've included a detailed list below of the record types that we will be removing from provisional.
- These record types will remain accessible as Search/View only for provisional users.
- There is no change for non-provisional users. These record types will still be available in ZIMS, and users outside of the provisional roles will continue to record data in these record types.

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- Need an exception? If you would like any of your provisional users to continue recording data for these record types, you can modify your custom provisional roles to allow them to 'Add' data.
- The change to role access will take effect 30 April 2025.

### For those managing provisional records

- As part of this change, these record types will no longer appear in the menu for Security Tools > Data Entry Monitoring > Provisional Records.
- As of May 2025 Provisional Data Entries can be approved, edited, or rejected/deleted from two areas in ZIMS; Data Entry Monitoring and Daily Activity. Please ensure you work between both areas to ensure you are reviewing all provisional records at your institution.
- **By 1 September 2025:** To prepare for this change, we ask that you review your provisional data for the affected record types and approve or reject the records by 1 September 2025.
- After that time, those record types will not be available for approval or rejection. Any remaining records of the data types that are being removed from provisional access, that have not been approved or rejected by you, will be marked as approved through a data fix. We can provide a list of those records and you can edit or delete them after the data fix.

**Effective 30 April 2025, these are the record types that will no longer be available as an option to record as provisional records:**

#### Animal module

- Animal observations
- Contraception
- Development milestones
- Life stage
- Rearing
- Alerts

#### Enclosure module

- Enclosure observations
- Enclosure substrate
- Plant

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- Water body
  - Maintenance requests
  - Enclosure status
  - Barriers
  - Enclosure alert
  - Dimensions
  - Furniture

### **Life support and Components module**

- Life support observations
- Component observations

### **Calendar module**

- Animal measurement task
- Animal enrichment session task
- Animal Assessment Observation task
- Maintenance task
- Enclosure treatment task
- Enclosure alert
- Animal alert

### **Institution module**

- Institution Note

Keep track of which provisional records are still available and where they can be approved in [this spreadsheet](#).

If you have any questions or concerns about the upcoming changes, please reach out to us at [support@species360.org](mailto:support@species360.org).

We thank you for your understanding and we hope that you find these changes improve the quality of your data and make life a little easier for you and for others in your institution.

*Revised 23 April 2025*