
My Institution-Adding and Managing Permits

How to manage your permits in ZIMS.

[Contact Species360 Support](#)

ZIMS allows you to record, track and assign your permits. The Permit grid is found under My Institution > Details tab > Permits.

Topics Covered

[Adding a Permit](#)

[Changing the Status of a Permit](#)

[Assigning a Permit](#)

[Finding a Global Permit](#)

Adding a Permit

To add a new Permit, select Add New Permit from the Actions menu.

Institution Search

Global Institutions | Your Local Institutions | Add New | My Institution

Details

Address: 150 Cleveland Park Dr.
City: South Carolina
State: South Carolina
Country: United States
Phone: +1 (864)467-4300
Fax: +1 (864)467-4314
Email: [redacted]
Website: <http://www.greenvillezoo.com>

Continent: North America
Country: United States
State: South Carolina
Latitude: 34.847168000
Longitude: -82.385809000

Institution Added By: Data Migration Process

Staff at Greenville Zoo

Handry/Administration Roles

Medical Roles

Permits

Type	ID	Name	Authority	Status Type	Effective Date	Expiration Date
Undetermined	CITES	BR 082328	CITES - Convention on Intl Trade in Endangered Species	Undetermined View Status History (0 Records)		
Undetermined	INJURIOUS W	LIFE PRT-788013	Undetermined Listing Authority (ZIMS Data Migration)	Undetermined View Status History (0 Records)		

Page 1 of 1 | Page Size: 20 Change | 1 - 2 of 2

Add New Permit

1 Permit Name * 2019 Florida Collecting

2 Permit ID

3 Permit Scope * Local

4 Permit Type * Collection

5 Source of Permit Registrar Office

6 Listing Authority * Florida Fish & Wildlife Conserv Comm

7 Application Preparer * Adrienne Miller

8 Permit Status * Application Submitted

9 Effective Date * 10/01/2019 Expiry Date Indefinite

10 Details

Note Templates

Save Save & Repeat Cancel

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1. Permit Name: Name of the permit is a free text field. Try to develop a naming convention so it will be easier to find your Permits in a search.
2. Permit ID: Most institutions use this to record the Permit number when it is received, so it may not be available at the time you add the Permit. You can always add it later when it is known.
3. Permit Scope: The Scope can be Local or Global. If you select Global, other institutions can view it. This can be very helpful when another institution's Permit information needs to be included in your Permit application or annual report.
4. Permit Type: Select the permit type from the dropdown list.
5. Source of Permit: This free text field is often used to record where the original permit is/will be stored.
6. Listing Authority: Select the proper listing authority from the dropdown list. If the listing authority in question is not present in the Global institution list, you can add it to your Local institution list. Go to My Institutions, and click the "add new" plus sign at the top of the module.
7. Application Prepared By: This is sourced from your Staff list and can be very important information if questions arise on your application.
8. Permit Status: Your Permit can be tracked using this field. Keeping this updated will allow your Staff to check the Permit Status on their own!
9. Effective and Expiry Date: Record the date of the current Status. Once you know an Expiry Date you can record that, or check the Indefinite box if the Permit never expires.
10. Details: Add any further information as needed.

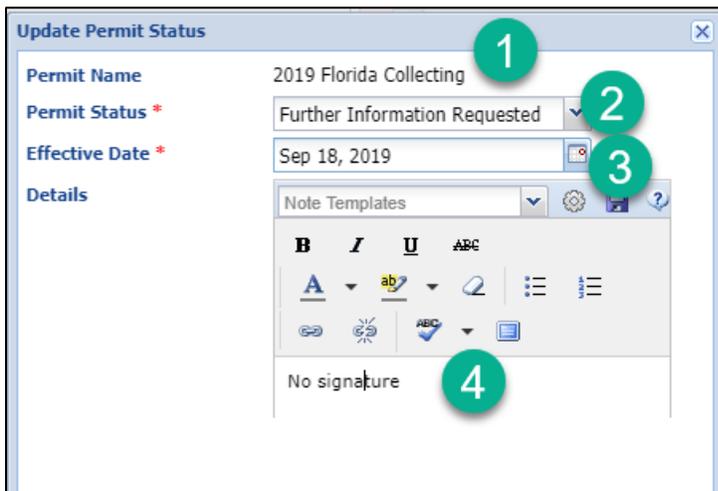
The Permit will now display in your Permits list.

Type	ID	Name	Authority	Status Type	Effective Date	Expiration Date	Assignments
Collection		2019 Florida Collecting	Florida Fish & Wildlife Conserv Comm	Application Submitted View Status History (1 Records)	Sep 01, 2019		1 Assignment(s) Recorded (edit/view)
Undetermined	CITES	BR 062326	CITES - Convention on and Trade in Endangered Species	Undetermined View Status History (0 Records)			1 Assignment(s) Recorded (edit/view)
Undetermined	INJURIOUS W	LIFE PRT-788013	Undetermined Listing Authority (ZIMS Data Migration)	Undetermined View Status History (0 Records)			8 Assignment(s) Recorded (edit/view)

[Back to Topics Covered](#)

Changing the Status of a Permit

To change the Status of a Permit, select the appropriate Permit > Actions > Update Permit Status.



- 1.The Permit Name will default and is not editable.
- 2.Select the appropriate new Status.
- 3.Record the Date the Status changed.
- 4.Add any Details as desired.

Note that the Permit now has 2 records in the Status History and the effective Date has been updated.

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Permits

Show search form

Type	ID	Name	Authority	Status Type	Effective Date	Expiration Date	Assignments
Collection		2019 Florida Collecting	Florida Fish & Wildlife Conserv Comm	Further Information Requested View Status History (2 Records)	Sep 18, 2019		1 Assignment(s) Recorded (edit/view)
Undetermined	CITES	BR 082328	CITES - Convention on Intl Trade in Endangered Species	Undetermined View Status History (0 Records)			1 Assignment(s) Recorded (edit/view)
Undetermined	INJURIOUS W	LIFE PRT-788013	Undetermined Listing Authority (ZIMS Data Migration)	Undetermined View Status History (0 Records)			8 Assignment(s) Recorded (edit/view)

Page 1 of 1 | Page Size 20 | 1 - 3 of 3

Our Permit has now been issued so we update the Status again. We also want to update the Permit information as we now have a Permit ID and an expiration date. Select the Permit > Actions > View/Edit Permit Details.

View / Edit Permit Details

Permit Name * 2019 Florida Collecting

Permit ID FC-12345

Permit Scope * Local

Permit Type * Collection

Source of Permit Registrar Office

Listing Authority * Florida Fish & Wildlife Conserv Comm

Application Prepared By Adrienne Miller

Permit Status Effective Date

Granted/Issued (Final)-With Oct 01, 2019 Condition

Expiry Date Oct 01, 2020 Indefinite

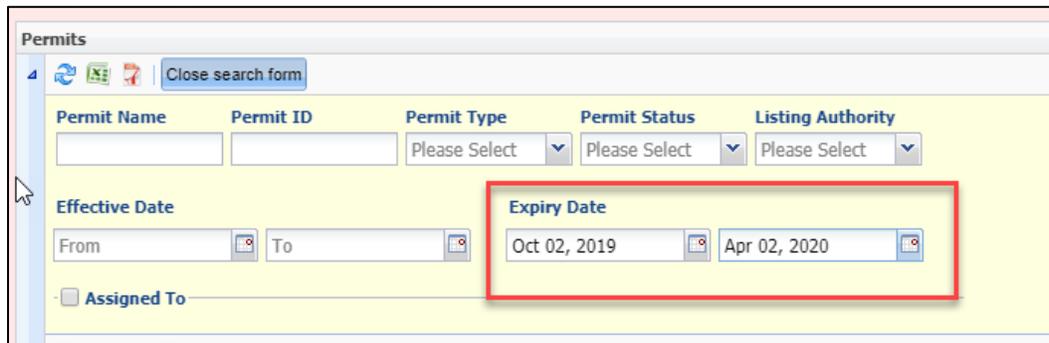
Selecting the View Status History hyperlink in the Status Type column, we can view the progress of our application. This is also where you would edit/delete any Status changes.

Permit History

Status	Status Change Date	
Granted/Issued (Final)-Wit...	Sep 27, 2019	
Further Information Requ...	Sep 18, 2019	
Application Submitted	Sep 01, 2019	

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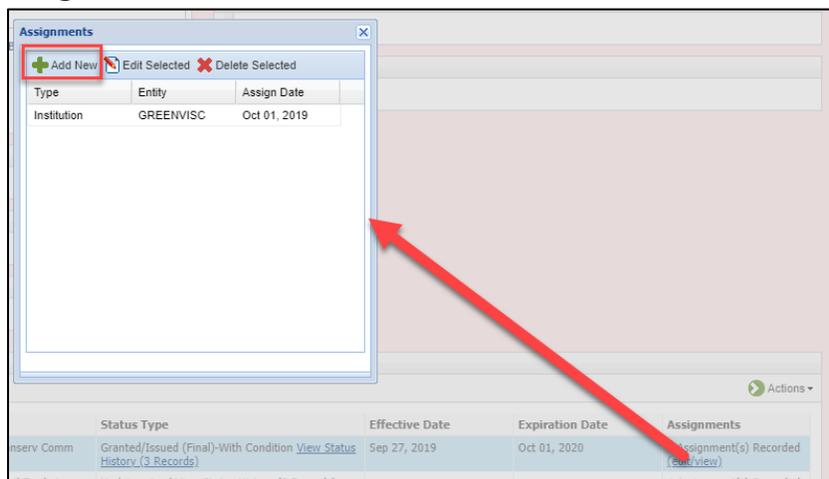
The Permit search form found above the Permit list lets you search your Permits by various filters. This can be very helpful to help you identify Permits that may be expiring that you may want to re-apply for.



[Back to Topics Covered](#)

Assigning a Permit

To view the Permit Assignments, select the Edit/View hyperlink in the Assignments column. By default, Permits are automatically assigned to your Institution. To add a new assignment, select the Add New button.

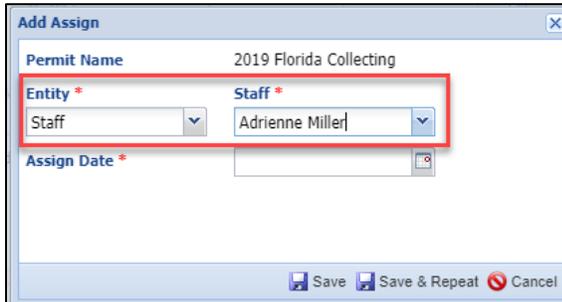


You can add additional assignments for:

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- Institution – You could add another Institution if you are part of a blanket permit application prepared by another Institution, or if you prepared the application and other Institutions are covered under it.
- Staff – Some Permits require that a Staff member be assigned, or you could assign them all to your Director!
- Animal – Assign the Permit to all animals covered under it. Permit Assignment is available as a Batch Action to save you time. Permit Assignment can also be done from within the Animal record.
- Enclosure – Some Permits are good only for some enclosures, such as Injurious Wildlife Permits. Permit Assignment can also be done from within the Enclosure record.

Selecting the Entity will drive the remaining fields.



The screenshot shows the 'Add Assign' dialog box with the following fields:

- Permit Name: 2019 Florida Collecting
- Entity *: Staff (dropdown menu)
- Staff *: Adrienne Miller (dropdown menu)
- Assign Date *: (empty date field)

Buttons at the bottom: Save, Save & Repeat, Cancel.



The screenshot shows the 'Add Assign' dialog box with the following fields:

- Permit Name: 2019 Florida Collecting
- Entity *: Animal (dropdown menu)
- Animal *: Animal ID (text field with search icon)
- Assign Date *: (empty date field)

Buttons at the bottom: Save, Save & Repeat, Cancel.

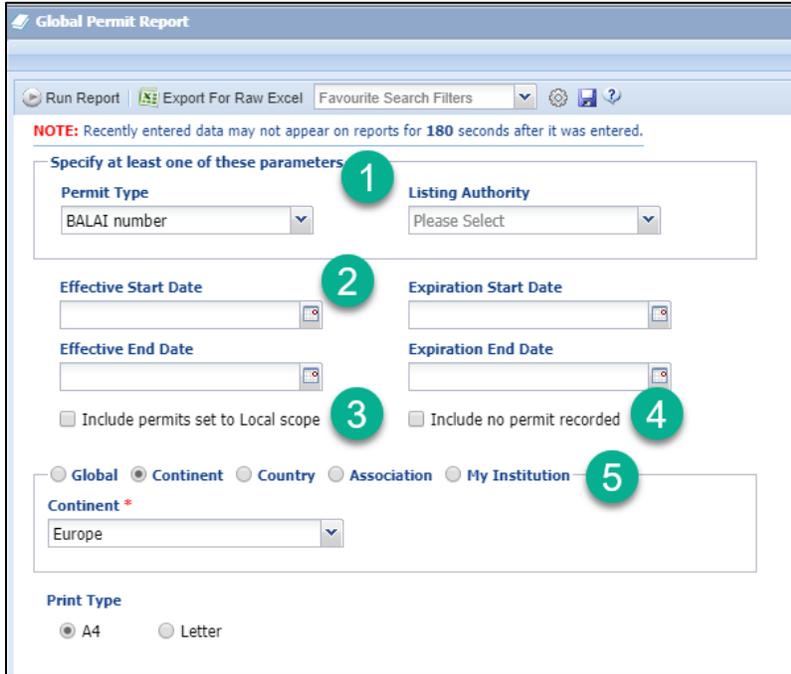
To Assign a Permit from within the Animal or Enclosure record go to More Details > Permits > Actions > Assign a Permit. All recorded Permits will appear in a drop down list under Permit Name.

[Back to Topics Covered](#)

Finding a Global Permit

To find permits marked as Global scope go to Reports > Global Permit Report.

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The screenshot shows the 'Global Permit Report' interface. At the top, there are buttons for 'Run Report' and 'Export For Raw Excel', and a 'Favourite Search Filters' dropdown. A red note states: 'NOTE: Recently entered data may not appear on reports for 180 seconds after it was entered.' Below this is a section titled 'Specify at least one of these parameters'. It contains several fields: 'Permit Type' (dropdown menu with 'BALAI number' selected), 'Listing Authority' (dropdown menu with 'Please Select'), 'Effective Start Date' and 'Expiration Start Date' (calendar pickers), 'Effective End Date' and 'Expiration End Date' (calendar pickers), two checkboxes for 'Include permits set to Local scope' and 'Include no permit recorded', and a radio button group for 'Global', 'Continent', 'Country', 'Association', and 'My Institution'. The 'Continent' radio button is selected, and a 'Continent *' dropdown menu shows 'Europe'. At the bottom, there is a 'Print Type' section with radio buttons for 'A4' and 'Letter'.

1. You must select a Permit Type or a Listing Authority although you can select both.
2. If you are looking for permits effective during a specific time frame or ones that expire during a specific time frame you can record those dates.
3. The option to Include Permits Set to Local Scope will produce results ONLY when My Institution is selected below.
4. Checking to Include No Permit Recorded will include institutions that have no Global Permits of the Type or Authority selected.
5. Select the scope of the report – from Global to My Institution.

The report below was run for BALAI permits recorded by European institutions.

Effective Start Date	Global Permit Report				Expiration Start Date		
Effective End Date	BALAI number				Expiration End Date		
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Mnemonic	Type	ID	Name	Authority	Effective	Expiration	Assigned
ALFRISTON	BALAI number	AB3502001	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Mar 06, 2017		1
AMERSFOOR	BALAI number	7036	BALAI 2014	Nederlandse Voedsel en Warenautoriteit	Jun 02, 2009		1
ARNHEM	BALAI number	35097	BALAI	Ministerie van Economische Zaken, Landbouw en Innovatie	Jun 17, 2010		1
BANHAM	BALAI number	AB/17/94/001	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Sep 30, 1994		1
BASEL	BALAI number	CH-Z-BS001	BALAI	Bundesamt für Lebensmittelsicherheit und Veterinärwesen BLV	Oct 07, 2015		1
BEAUVAL	BALAI number	FR.AZ 041 198 001	BALAI	DDCSPP Loir-et-Cher	Jul 02, 2013		1
BERLINZOO	BALAI number		D - AFF 005-EWG	Bundesamt für Lebensmittelsicherheit und Veterinärwesen BLV	Mar 09, 2016		1
BERN	BALAI number	CH-Z-BE001	BALAI 2014	Bundesamt für Lebensmittelsicherheit und Veterinärwesen BLV	Nov 10, 2014		1
BESANCON	BALAI number		FR.AZ 025 01	Government of France	Jul 04, 2014		1
BLACKPOOL	BALAI number	AB/08/04/001	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Jul 28, 2016		1
BLAIRDRUM	BALAI number	AB 68/12/002	CERTIFICATE	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Feb 02, 2016		1
BLAIRDRUM	BALAI number	AB68/12/002	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Nov 12, 2014		1
BRISTOL	BALAI number	AB/28/04/007	BALAI 2015	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Nov 13, 2014		1
BROXBOURN	BALAI number	AB/17/10/006	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Mar 23, 2017		1
BURFORD	BALAI number	AB/29/09/002	BALAI	DEFRA (UK) - Dept for Environment, Food & Rural Affairs	Nov 10, 2014		1

You can also view any Global Permits at other Institutions from the Permits grid in their Institution record. Depending on what information you are looking for this may be quicker than running a Global Permit Report as that report cannot be filtered by Institution.

Type	ID	Name	Authority	Status Type	Effective Date	Expiration Date	Assignments
Transfers/transport	Article 10	307420/01	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (1 Records)	Nov 20, 2017		2 Assignment(s) Recorded (View)
Transfers/transport	Export	550158/01	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	May 18, 2017		2 Assignment(s) Recorded (View)
Transfers/transport	Article 10	551056/01/01	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	Jan 29, 2017	Jan 29, 2017	2 Assignment(s) Recorded (View)
Transfers/transport	Article 10	551056/01/02	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	Jan 29, 2017	Jan 29, 2017	2 Assignment(s) Recorded (View)
Transfers/transport	Article 10	551056/01/03	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	Jan 29, 2017	Jan 29, 2017	2 Assignment(s) Recorded (View)
Transfers/transport	Article 10	545130/01	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	Jul 13, 2016	Jul 13, 2016	2 Assignment(s) Recorded (View)
Transfers/transport	Article 10	FR1406811153-K	CITES - Convention on Intl Trade in Endangered Species	Expired (Final) View Status History (2 Records)	May 04, 2016		2 Assignment(s) Recorded (View)

[Back to Topics Covered](#)

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