ZIMS Keeper & Aquarist Course – Following up with your staff!

Contact Species360 Support

Introduction

Use this document to help follow up with staff who have taken the ZIMS Keeper & Aquarist course and check their skills before signing off. Each user receives a ZIMS certificate following the completion of the course, which you can request from the user to know they are ready for their internal skills check.

You can use this document as it is or use it as a template and tailor it to your institution's needs and/or training program.

For additional confidence in your data, you can choose to set up Provisional Data Entry for any new users, which allows you to easily review entries within your institution before they are made global. Read more about Provisional Data Entry here.

Topics

Ways to use this document

There are different ways you can use this document to help with your ZIMS user assessments. You can either:

1. Sit with your user and use the list of tasks or task-sheet example (or adapted version) to ask your user to perform specific transactions. Check the user's skills off using the checklist example (or adapted version).

2. Give your user the task-sheet example (or adapted version) to take-away and check the user's skills and progress against the checklist example (or adapted version) using data entry monitoring.

3. Use the checklist example (or adapted version) to monitor a user's progress using data entry monitoring (or your usual monitoring reports) as they enter specific information during their normal daily routine.

If you are using ZIMS to check your user's progress (option 2 or 3 above), visit the [Data Monitoring](#) portion of this document to find out how to review your user's entries.

List of tasks

This section details a list of tasks you can ask your user to perform to check understanding and skills. The section will also detail what to look for in the entry.

Searching and Navigating ZIMS

1. **Look up an animal or group record**

Ask your user to look up a specific animal or group record, and report back on some information. Some examples include:

4. What was the last weight of the animal
5. How much weight did the animal gain/lose between it's last to weight measurements
6. What was the last census count
7. Who are the recorded parents.
8. What was the last note/observation recorded for the animal

This is checking that your user can:

- ✓ Search for an animal using the search boxes
- ✓ Identify the correct animal from the search list
- ✓ Navigate the animal record to locate information

Increase the difficulty: *Try selecting an animal with a house name that appears multiple times at your institution, or give an identifier rather than the house name or local ID.*

2. **Run an 'Animal Simple Search'**

Ask your user to run an Animal Simple Search to look up a specific taxonomy and tell you basic information. Some examples include:

- Which animal (of a specific taxonomy) is the heaviest
- Who is the oldest animal in your zoo of a specific taxonomy

This is checking that your user can:

- ✓ Run an 'Animal Simple Search'
- ✓ Use column customization to add columns
- ✓ Sort columns

3. Run an 'Animal Advanced Search'

Ask your user to run a more complex search and tell you basic information. Some examples include:

- Tell me how many animals were born between February and June this/last year
- Tell me how many female animals (of a specific species) do we hold
- Which group (of a specific species) has the most animals

This is checking that your user can:

- ✓ Run an 'Animal Advanced Search' to find more specific information

Increase the difficulty: *Try selecting multiple search terms, e.g., "tell me how many individual animals were born between February and June" asks the user to search for "Animal Type" and "Birth Date Range".*

4. Create an Animal List

Ask your user to create an Animal List with specific animals.
Ask the user to add or remove animals to a pre-existing Animal List.

Examples include:

- Specific animals within the same taxonomy
- Specific animals within a particular enclosure
- A group of animals that would be wormed on the same day.

This is checking that your user can:

- ✓ Create an Animal List
- ✓ Edit/manage Animal Lists

Entering Single Information

Some of these tasks may be optional based on the user's normal animal routine, or whether you use the feature in ZIMS, e.g., a keeper may not regularly measure animal lengths, or you may not use the Training grid. You can remove these from the worksheet at the end.

1. Enter a weight

Ask the user to enter a weight for one of their animals.

This is checking that your user can:

- ✓ Add weights to an animal record
- ✓ Identify when to change units
- ✓ Identify when to use “estimate” and “exclude from norms”

Increase the difficulty: *Try selecting an animal’s weight which has a reason to be an estimate, excluded from norms, or one which is measured in a different unit to the default (e.g. grams instead of kilograms).*

2. Record a length

Ask the user to enter a length for one of their animals.

This is checking that your user can:

- ✓ Add lengths to an animal record
- ✓ Identify the correct descriptors to use

3. Record a feed log

Ask the user to enter a feed log to one of their animals. For example, recording:

- **Food in**, e.g., the daily diet
- Either the **food left** or the **food consumed**
- Whether the food was fed to one animal **directly**, or **broadcast** to the whole enclosure

This is checking that your user can:

- ✓ Enter a daily feed log to an animal record
- ✓ Identify when to use ‘direct’ vs ‘broadcast’

4. Enter a logical identifier

Ask the user to enter a logical identifier to one of their animals, e.g. a house name or house number.

This is checking that your user can:

- ✓ Add a logical identifier to an animal record

5. Enter a physical identifier

Ask the user to record a physical identifier, for example a bird ring, a noticeable mark, scar or coat color/pattern.

This is checking that your user can:

- ✓ Add different types of physical identifiers to an animal record to help identify records
- ✓ Identify the correct descriptors to use

6. Move an animal to another enclosure

Ask the user to move an animal or whole group to a new enclosure in ZIMS.

This is checking that your user can:

- ✓ Move animals to the correct enclosure
- ✓ Identify the appropriate reasons for the enclosure move

7. Notes and observations

Ask the user to record a note or observation on an animal or group record.
Examples include:

- A medical observation
- A diet change
- A behavior summary

This is checking that your user can:

- ✓ Add notes or observations to an animal record
- ✓ Identify the correct note types and subtypes to be associated with the note/observation

8. Record an enrichment session

Ask the user to record an enrichment session on an animal.

This is checking that your user can:

- ✓ Add enrichment sessions to an animal record

9. Record a training session

Ask the user to record a training session on an animal.

This is checking that your user can:

- ✓ Add training sessions to an animal record

Batch Transactions

This section checks your users progress in entering information onto multiple records at the same time.

1. Using Animal Lists

Ask the user to enter a single note or observation for multiple animals using an Animal List.

This is checking that your user can:

- ✓ Use Animal Lists to enter batch information
- ✓ Use the "Single Entry" option on the batch transactions functionality

2. Using the Batch Transactions box

Ask the user to enter weights on two or more animals using the Batch Transaction box.

This is checking that your user can:

- ✓ Use the Batch Transactions box
- ✓ Use the "Custom Entry for Each Animal" option on the batch transactions functionality

3. Creating Husbandry Log Templates

Ask the user to create a Husbandry Log Template from scratch.

Husbandry Log Templates can be designed in many different ways depending on the information you would like recorded. Some examples include:

- Weights for a species, or multiple species, e.g., one tab per species
- All relevant information for specific animals, e.g., one tab for an animal's weights, notes and training sessions, a second tab for a second animal

- A workflow, e.g., recording all the animal information and enclosure information in one location

Note: Many different transaction types can be included in the Husbandry Log Template, including notes, observations, weights, training sessions, enrichment sessions and feed logs. One transaction type specific to the husbandry log template is animal/enclosure checklists. You may want your user to make use of animal or enclosure checklists. These can be used to record a yes/no value, e.g., was the animal seen, or was the pool level correct

This is checking that your user can:

- ✓ Create a Husbandry Log Template
- ✓ Create animal or enclosure checklist items

4. Using Husbandry Log Templates

Ask the user to enter information into ZIMS using a Husbandry Log Template. This could be the template the user has created, or one that is already set up.

This is checking that your user can:

- ✓ Add information using the Husbandry Log Template
- ✓ Use animal or enclosure checklist items

Reports

1. Daily Report

Ask the user to run a Daily Report for a specific taxonomy/team/enclosure for a specific day. Ask the user to export the Daily Report to PDF.

You can ask the use to run for:

- A specific day or period (up to 30 days)
- A specific taxonomy, animal, Animal List, enclosure, enclosure list or choose entered by to get a specific user or team
- Specific event types (e.g. notes and observations, weights, animal checklist items

This is checking that your user can:

- ✓ Run the Daily Report for a specific time period to extract specific information
- ✓ Export the Daily Report to PDF

2. Note retrieval

Ask the user to run a Note Retrieval Report for a specific set of criteria.
Ask the user to export the results to PDF.

This can be useful to demonstrate why choosing the correct note types and sub-types, or using standardized terms are important.

Some examples include:

- Search for all notes containing TOOTH or TEETH for X species
- Search for all notes containing FECAL and LOOSE
- Search for all notes for RED PANDA with note type REPRODUCTION

This is checking that your user can:

✓ Run the Note Retrieval Report for various criteria
✓ Export the Note Retrieval Report to PDF

Tools

1. Animal Graphing Tool

Ask the user to export specific information from the animal graphing tool.
Ask the user to export the results to PNG or to export the data to Excel.

Some examples include:

- A graph of all weights for specific individuals/a species for the past month
- A graph showing the weight and feed log for a specific animal

This is checking that your user can:

✓ Run the Animal Graphing Tool to visualize specific information.
✓ Export the graph to a picture
✓ Export the raw data to Excel

2. Pedigree explorer

Ask the user to find out specific information about an animal's pedigree using the pedigree explorer tool.

For example:

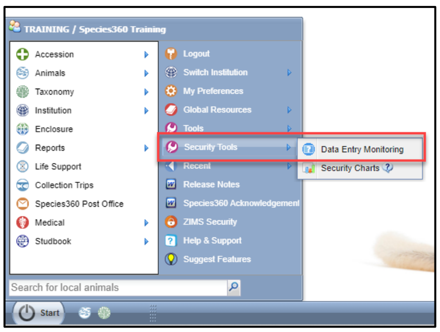
- Who are the grandparents of animal X
- Who are the parents of animal X, and who are the siblings

This is checking that your user can:

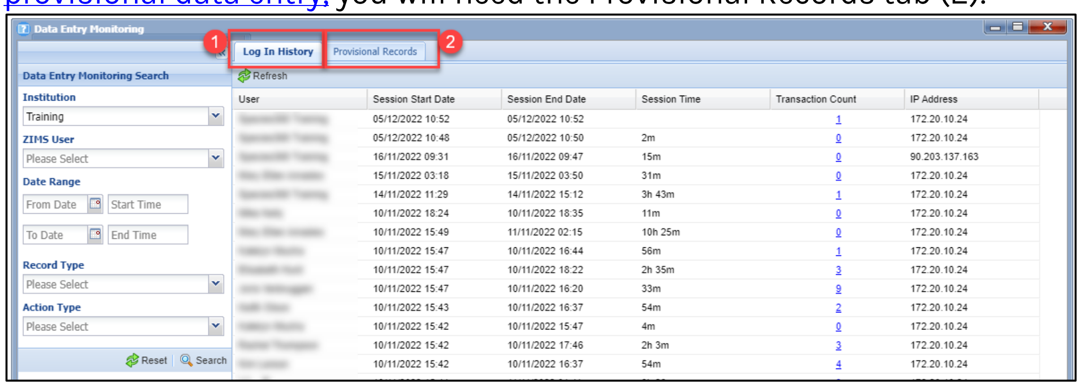
- ✓ Run the Pedigree Explorer Tool for a specific animal
- ✓ Interpret the results to find information

Data-entry monitoring

To view what your user has been entering into ZIMS, you can use the Data-Entry Monitoring Tool. The tool is found in the Start Menu, under Security Tools > Data Entry Monitor (*please note you will need the correct permissions (e.g. Local Admin) to access Data Entry Monitor*)

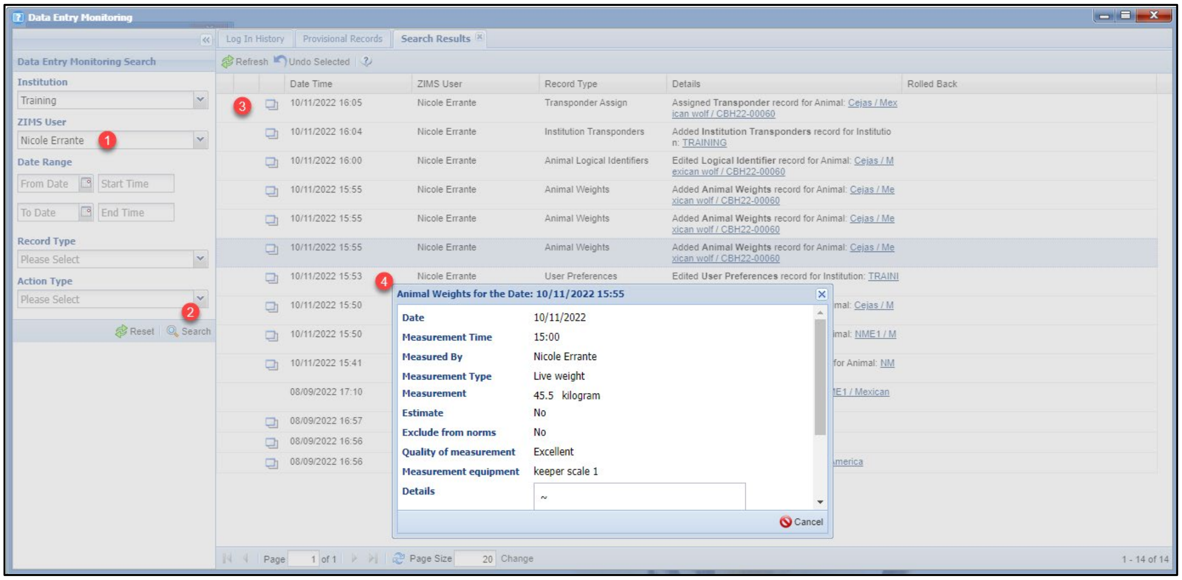


The Data-entry monitor logs all information entered by users. If your institution [does not use provisional data entry], you will need the Log In History tab (1). If your institution [uses provisional data entry], you will need the Provisional Records tab (2).



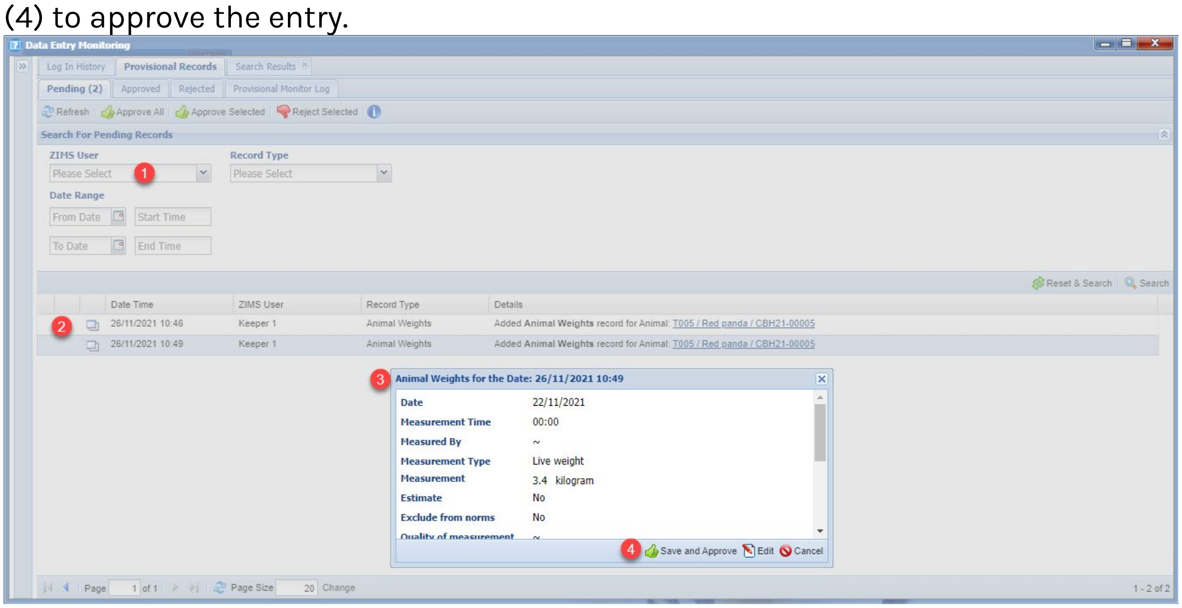
Non-provisional monitoring

On the Log In History tab, use the 'ZIMS User' search box (1) to search for the user you are evaluating, then click Search (2). This will bring up a list of actions they have completed in ZIMS (3). You can double click on any of the entries to open them up and view what they have entered. You can then evaluate the information and decide whether they are meeting your standards.



Provisional monitoring

Provisional entries are found in the Provisional Records tab. On opening, all provisional entries awaiting approval will show. Use the 'ZIMS User' search box (1) to search for the user you are evaluating, then click Search (2). This will now only show the entries for that user (3). Double click on any entry to open it up and view what they have entered (3). Review the information, and if you are happy with the data, you can click Save and Approve (4) to approve the entry.



(See next page for Task-sheet example and page 15 for the Checklist)
Revised 6 January 2023

Task-sheet example – click here to download the checklist in an editable word document

To use this task-sheet, replace any information in [brackets] with information from your institution. Delete or add any additional tasks as needed.

Searching and Navigating

1. Using the search box, open animal [LOCAL ID].

   - The last weight of this animal was ....
   - The animal gained/lost .... since it's last weight measurement
   - The parents of the animal are...

     ....

2. Using the Animal Simple Search, search for the species [ENTER SPECIES] Add the following columns found under the **Last Weight Measurement** menu:
   - Date
   - Value
   - UOM

   - .... is the heaviest animal
   - .... is the oldest animal

3. Using the Animal Advanced Search, search for all [MALE/FEMALE] [ENTER HIGHER TAXONOMY, E.G. MAMMALS] that were born between [DATE] and today.

   - There are .... [male/female] [mammals] are there in our institution

4. Create an Animal List which includes all [SPECIES]/ which includes all animals in [ENCLOSURE]

   - The Animal List is called: ....

Entering Single Information

1. Record a weight on an animal record.
   - Write the Local ID here: ....
2. Record a length on an animal record.
   - Write the Local ID here: ....
3. Record a feed log on an animal record.
   - Write the Local ID here: ....
4. Record a logical identifier on an animal record.
   - Write the Local ID here: ....
5. Record a physical identifier on an animal record.
   - Write the Local ID here: ....
6. Move an animal (or whole group) to another enclosure.
   - Write the Local ID here: ....
7. Record a note or observation on an animal record.
   - Write the Local ID here: ....
8. Record an enrichment session on an animal record.
   - Write the Local ID here: ....
9. Record a training session on an animal record.
   - Write the Local ID here: ....

Batch Transactions

1. Record a single note/observation on multiple animal records using an Animal List.

   - Write the Animal List used here: ....

2. Record weights for two or more animals using the Batch Transaction box.

   - Write the Local IDs here: ....

3. (keep one example and delete the others)

- Create a Husbandry log template to record animal weights for all the animals on your section.
- Create a Husbandry log template to record weights, notes/observations and training sessions for all the [SPECIES].
- Create a Husbandry log template to record weights, notes/observations and training sessions for all the [SPECIES], and all enclosure information (water quality, temperatures, barrier voltages) for [ENCLOSURE(S)].

   - Write the name of the Husbandry Log Template

     here:..

4. Use the Husbandry Log Template you just created, or one already created, to enter some daily information, e.g. weights, notes/observations

   - Write the name of the Husbandry Log Template used

     here:..

Reports

1. Run the Daily Report for [DATE/DATE RANGE], for [YOUR TEAM/SPECIES/ENCLOSURE].

   Export the report to PDF and hand it in with this sheet.

2. Run the Note Retrieval Report for [DATE RANGE], searching for all notes for [SPECIES] with note type [e.g. REPRODUCTION]

   Or

   Run the Note Retrieval Report for [DATE RANGE], searching for all notes for [SPECIES] containing the words [FIRST WORD] [AND/OR] [SECOND WORD].

   Export the report to PDF and hand it in with this sheet

Tools

1. Graph all of the weights for [SPECIES] during [DATE RANGE, e.g. last month]. Export the graph to PDF and hand it in with this sheet.

2. Run the Pedigree Explorer for animal [LOCAL ID] and fill in the information.

   - The animal's Dam is ....
   - The animal's Sire is ....
   - The animal has had .... offspring
   - The animal's last offspring was born in ....

Checklist example – click here to download the checklist in an editable word document

User:		Certificate received:	
		Date of assessment:	

1.0	**Searching and Navigation**	
1.1	Look up an animal or group record	
1.1.1	Search for an animal using the search boxes	
1.1.2	Identify the correct animal from the search list	
1.1.3	Navigate the animal record to locate information	
1.2	Run an ‘Animal Simple Search	
1.2.1	Run an ‘Animal Simple Search’	
1.2.2	Use column customization to add columns	
1.2.3	Sort columns	
1.3	Run an ‘Animal Advanced Search’	
1.4	Create an Animal List	
1.4.1	Create an Animal List	
1.4.2	Edit/manage Animal Lists	

2.0	**Entering Single Information**	
2.1	Record a weight on an animal record	
2.2	Record a length on an animal record	
2.3	Record a feed log on an animal record	
2.4	Record a logical identifier on an animal record	
2.5	Record a physical identifier on an animal record	
2.6	Move an animal (or whole group) to another enclosure	
2.7	Record a note or observation on an animal record	
2.8	Record an enrichment session on an animal record	
2.9	Record a training session on an animal record	

3.0	**Batch Transactions**	
3.1	Animal Lists	
3.1.1	Record a single entry on multiple animal records using the Animal List functionality	

3.1.2	Use the 'Single Entry for All Animals' functionality on the batch transaction	

3.2	Batch Transaction box	
3.2.1	Record a single entry on multiple animal records using the Batch Transaction functionality	
3.2.2	Use the 'Custom Entry for Each Animal' functionality	

3.3	Create a Husbandry Log Template	
3.3.1	Create a Husbandry Log Template	
3.3.2	Create animal or enclosure checklist items	

3.4	Using Husbandry Log Templates	
3.4.1	Add information using the Husbandry Log Template	
3.4.2	Use animal or enclosure checklist items	

4.0	**Reports**	
4.1	Daily Report	
4.1.1	Run the Daily Report	
4.1.2	Export the Daily Report to PDF	

4.1	Note Retrieval Report	
4.1.1	Run the Note Retrieval Report	
4.1.2	Export the Note Retrieval Report to PDF	

5.0	**Tools**	
5.1	Animal Graphing Tool	
5.1.1	Run the Animal Graphing Tool to visualize specific information	
5.1.2	Export the graph to a picture	
5.1.3	Export the raw data to excel	

5.2	Pedigree Explorer	
5.2.1	Run the Pedigree Explorer Tool for a specific animal	
5.2.2	Interpret the results to find information	

User Assessment completed by:		Date:	