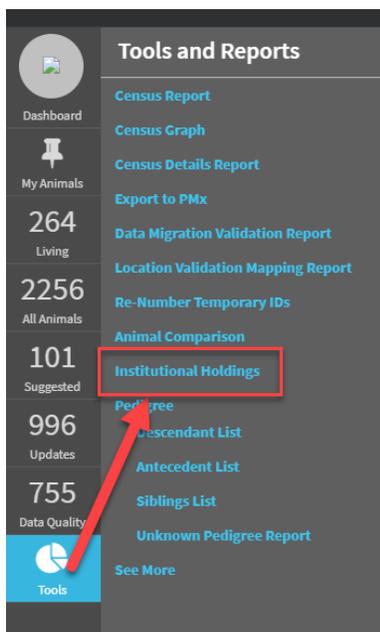


Institutional Holdings in ZIMS Studbooks

[Contact Species360 Support](#)

Under the Tools bar is an option called "Institutional Holdings". This is similar to the Poplink "Current Holdings" report and replaces the SPARKS "Institutional Summary" report.



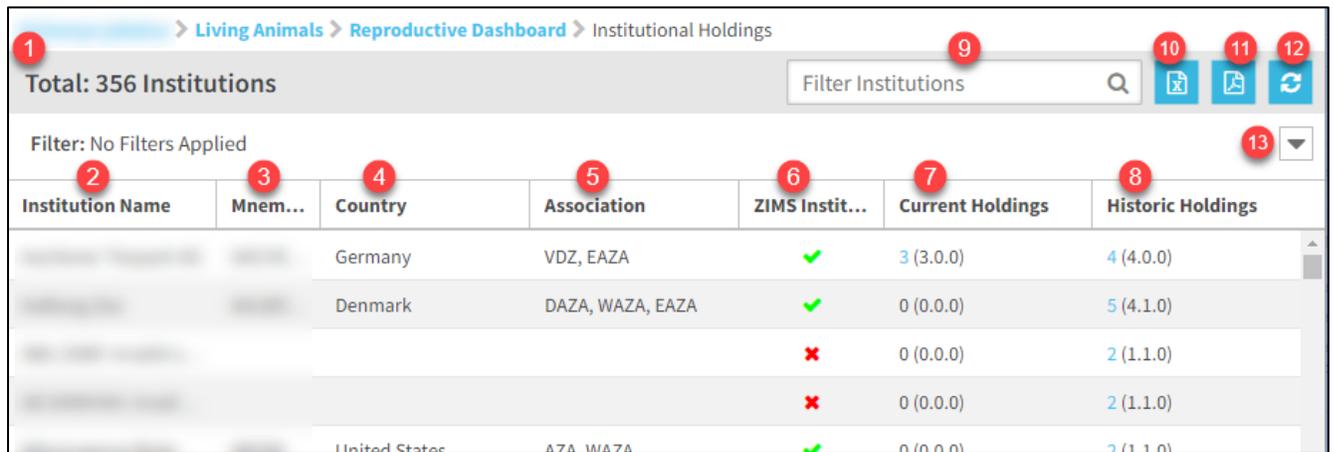
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Institutional Holdings Display

The Institutional Holdings report shows a list of all institutions which have historically held the studbook species.



The screenshot shows a web interface for 'Institutional Holdings' with the following elements:

- 1**: Breadcrumbs: > Living Animals > Reproductive Dashboard > Institutional Holdings
- 2**: Total: 356 Institutions
- 3**: Filter: No Filters Applied
- 4**: Search bar: Filter Institutions
- 5**: Export icons: Excel, PDF, Refresh
- 6**: Filter dropdown menu
- 7**: Table header: Institution Name, Mnem..., Country, Association, ZIMS Instit..., Current Holdings, Historic Holdings
- 8**: Table rows with data:

Institution Name	Mnem...	Country	Association	ZIMS Instit...	Current Holdings	Historic Holdings
		Germany	VDZ, EAZA	✓	3 (3.0.0)	4 (4.0.0)
		Denmark	DAZA, WAZA, EAZA	✓	0 (0.0.0)	5 (4.1.0)
				✗	0 (0.0.0)	2 (1.1.0)
				✗	0 (0.0.0)	2 (1.1.0)
		United States	AZA, WAZA	✓	0 (0.0.0)	2 (1.1.0)
- 9**: Filter dropdown menu
- 10**: Export to Excel icon
- 11**: Export to PDF icon
- 12**: Refresh icon
- 13**: Filter dropdown menu

1. The Total number of institutions in your list displays at the top
2. Institution Name - name of the institution
3. Mnemonic - mnemonic of the institution
4. Country - country where the institution is located
5. Association - Institution's Regional Associations
6. ZIMS Institution - ZIMS institutions will have a green tick, non-ZIMS institutions have a red cross. This helps you know if you need to contact the institution for updates.
7. Current Holdings - this will display the number of animals currently held by the institution in the list. The number in blue is a hyperlink to the animal list
8. Historic Holdings - this will display the number of animals historically held by the institution in the list. This number should include all animals ever held by this institution at any time (including those currently there). The number in blue is a hyperlink to the animal list.
9. Filter institutions - Quickly filter your list for a specific institution
10. Export the list to Excel
11. Export the list to PDF
12. Refresh the list
13. Expand the filter menu to filter by Institution, Date, Taxonomy and/or UDF

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All the columns in this list are sortable (Ascending or Descending) and column customization is available to add or remove columns.

Mnemonic	Country	Association
AKRON	↑ Sort Ascending	AZA, WAZA
ALEXANDRI	↓ Sort Descending	AZA
ASHEBORO	Columns	<input checked="" type="checkbox"/> Institution Name SEZAF
AWENDA	United States	<input checked="" type="checkbox"/> Mnemonic
BINGHAMTO	United States	<input checked="" type="checkbox"/> Country

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Filtering Institutional Holdings

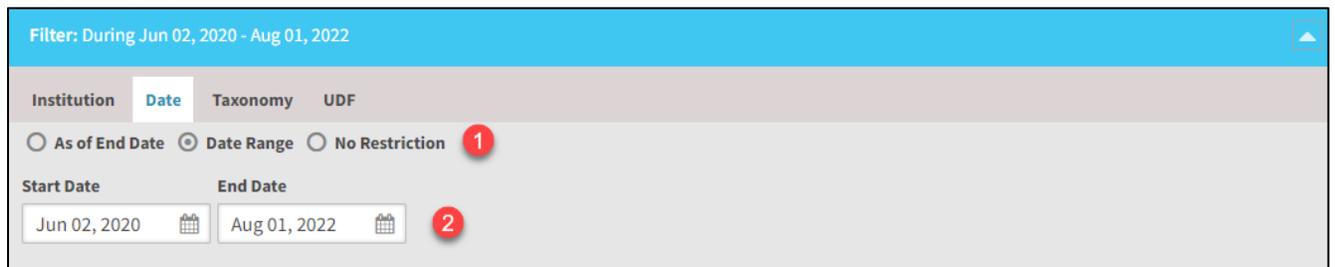
At the top of the animal list is an expandable search box that provides you with additional filters to your search and export.

Institution Filters:



1. Choose to use previously saved filters
2. Save a new filter or manage previously saved filters
3. Add more institutions/continents/countries/associations
4. Exclude specific institutions
5. Institutions, continents, countries and associations included display here
6. Excluded institutions display here

Date Filters:



1. Choose to filter by 'As of End Date', 'Date Range', or 'No Restriction'
2. Choose your dates

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Selecting an as of end date or a date range to view the number of institutions holding animals and the number of animal held at or during that time.

- The “Current” and “Historic” toggle buttons were removed from this tool now that there is the option to filter the report by date.
- The current holdings column will always display the institution’s current holdings. If the user wants to see a list of only currently holding institutions, they can add an “as of” date filter and select today’s date or they can sort the “current holdings” column.
- The historic holdings displays the total number of animals ever held by that institution regardless of dates selected.

When the user first opens the Institution Holdings report there are no filters applied and all historic holding institutions are displayed.

Institution Name	Mnemonic	Current Holdings	Historic Holdings	Holdings During Jun 0...
		3 (3.0.0)	4 (4.0.0)	3 (3.0.0)
		4 (0.4.0)	7 (1.6.0)	4 (0.4.0)
		11 (4.7.0)	18 (9.9.0)	11 (4.7.0)

- When the user filters by a date range or as of end date the list will filter to institutions that held animals during the filter and a new column displays in the Institutional Holdings screen with a header “holdings during the date entered in the filter.” This new column displays the animals held at institutions during or as of the time selected. User can select the hyperlinked number to view a list of animals held by the institution.

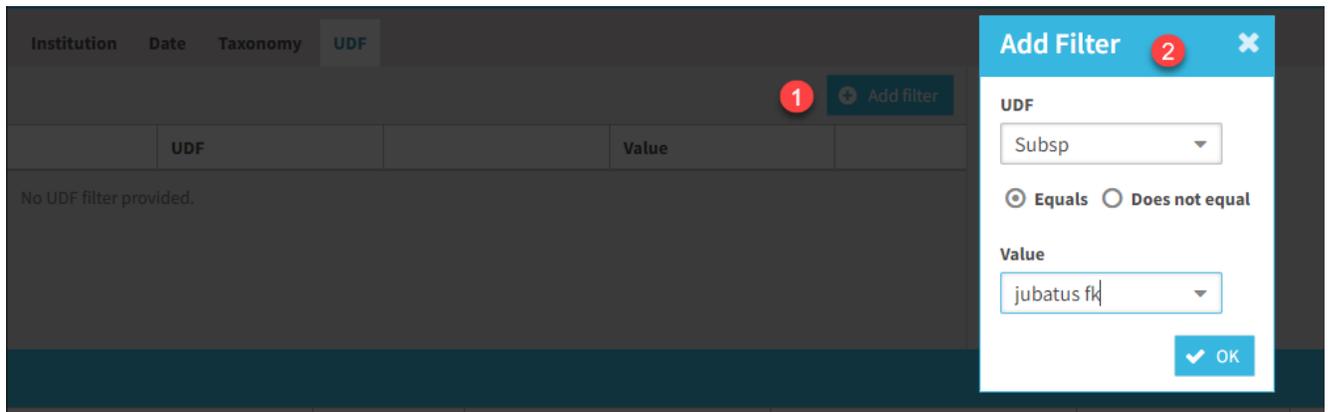
Taxonomy Filters:



If you manage a studbook with multiple taxonomies, filter by any of the taxonomies included. You can select to filter by one or more taxonomies.

UDF Filter

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1. Click 'Add Filter' to add a UDF filter (these must be already present in your studbook)
2. In the pop up, choose the UDF, condition (equals or does not equal) and the value. Click OK to add it to the list of UDF filters. You can choose multiple UDF filters to filter Institutional Holdings.

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