Transitioning to ZIMS for Studbooks for Animal Program Leaders

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INTRODUCTION: What is the purpose of this document?

This document was created to guide AZA’s Animal Program Leaders in topics related to the transition to ZIMS for Studbooks. This includes, but is not limited to, migration tips, where to find training materials, and who to contact for help. This document is current to February 2019 and will be updated as needed.

AZA REQUIREMENTS: What is the APM Committee accountability requirement for migrating to ZIMS for Studbooks?

AZA and Species360 have agreed to migrate AZA studbooks into the Live version of ZIMS for Studbooks by December 31st, 2020. The Animal Population Management Committee (APM Committee) is managing this accountability requirement, and created a Transition Leadership Team to provide guidance and open communication throughout the process.

Studbook migration accountability deadlines:

- **April 1st, 2019** – By this date, AZA Studbook Keepers must be signed-up using the Sandbox link and have submitted required materials to the Population Management Center for Species360 to migrate to the Sandbox version of ZIMS for Studbooks in May 2019, except* for those studbooks that:
  - Have a scheduled planning meeting and are analyzing data in 2019;
  - Have a Studbook Keeper who has not yet taken the PMI course;
  - Are vacant/do not currently have a Studbook Keeper;
  - Are maintained in software other than SPARKS or PopLink (e.g. Excel, Access).

- **December 31st, 2020** – By this date, AZA studbooks must migrate to the Live version of ZIMS for Studbooks, except* for those studbooks that:
  - Have a Studbook Keeper who has not yet taken the PMI course;
  - Are vacant/do not currently have a Studbook Keeper;
  - Are maintained in software other than SPARKS or PopLink (e.g. Excel, Access).

*if you are unsure if a studbook falls into one of these exceptions, please contact the Population Management Center (PMC) Studbook Analyst, Kelvin Limbrick, at pmc@lpzoo.org.

The Transition Leadership Team includes members from AZA and PMC Staff, APM Committee members, and Professional Development Committee (PDC) members. This team will enlist the help of TAG Chairs, SSP Coordinators, Studbook Keepers, Institutional Liaisons and Institutional Directors to ensure we meet the accountability deadlines for each Animal Program.

Migration process guidance:

- On a monthly basis:
  - APM Committee will send all AZA Program Leaders an email update about AZA’s migration to ZIMS for Studbooks and any related news;
  - Species360 will host webinars for ZIMS for Studbooks Users to share existing and new functionality while also answering questions (see below for how to sign up);
  - PMC Director will facilitate a conference call for PMC/Adjunct Population Biologists.

- Every other month:
The APM Committee Transition Leadership Team will host online ‘Coaching Calls’ for you to join and ask any relevant questions. Via AZA Mid-Year Meetings and Annual Conferences, AZA’s Professional Development team and Species360 will offer training workshops as well as being available in conjunction with the PMC Help Desk.

During this transition period, AZA Population Management I and II courses will not be taught (2019), so that they can be reconfigured to fully incorporate ZIMS for Studbooks. These courses will next be offered in 2020.

**SANDBOX vs LIVE:** What is the difference between the Sandbox and Live versions of ZIMS for Studbooks?

**ZIMS for Studbooks Sandbox** – This is a testing area where you can manipulate your studbook data and learn more about ZIMS for Studbooks software, before migrating to the Live version of ZIMS for Studbooks. The Sandbox is a place to learn, make mistakes and generally familiarize yourself with the format and functionality. Any changes you make to your studbook in the Sandbox will not affect your actual data, because you need to submit another copy of your studbook (from SPARKS or PopLink) once you are ready to migrate to Live. While your studbook is in the Sandbox, you must continue to maintain your studbook database in SPARKS or PopLink. When the time comes to migrate to the Live version of ZIMS for Studbooks, your up-to-date SPARKS or PopLink database (not the Sandbox version) will be used.

Log into the Sandbox here: [https://studbooks.species360.org/](https://studbooks.species360.org/)

**ZIMS for Studbooks Live** – This is the program that will maintain the studbook data, after you’ve had time to “practice” in the Sandbox. ZIMS for Studbooks Live receives both real-time updates from ZIMS for Husbandry (which the Studbook Keeper may choose to accept into the official database), as well as data directly entered by the Studbook Keeper. Live replaces SPARKS and PopLink software. Once a studbook is migrated into Live, it cannot be “re-migrated” a second time.

Log into Live here: [https://zims.species360.org/](https://zims.species360.org/)

**NOT CURRENTLY USING ZIMS SOFTWARE:** What about Studbook Keepers at facilities without ZIMS access?

All AZA Studbook Keepers will receive access to the ZIMS for Studbooks platform, and Species360 will waive access fees for individuals at non-ZIMS facilities. Individuals with questions should contact PMC Studbook Analyst, Kelvin Limbrick, at [PMC@LPZoo.org](mailto:PMC@LPZoo.org).

To repeat, non-ZIMS facilities will be able to access ZIMS for Studbooks without cost to manage assigned studbooks.

Just as a reminder:
**ZIMS for Studbooks** manages studbook data, which is either:
- imported from a pre-existing SPARKS or PopLink studbook database,
- added manually, by the Studbook Keeper, in ZIMS for Studbooks;
- or entered into the studbook by the Studbook Keeper, who has accepted a “Pending Update” and/or a “Suggested Animal.”

**ZIMS for Husbandry** is for individual institutional data; the data are entered by one or more institutions (that are Species360 members). These data will appear in the studbook as “Suggested Animals” or “Pending Updates,” and must be approved by the Studbook Keeper in order to be officially added to the studbook.

Access into ZIMS for Studbooks does not include direct access into other modules such as ZIMS for Husbandry.

**MIGRATION TIMELINE: How long will it take to migrate?**

<table>
<thead>
<tr>
<th>Step</th>
<th>Step Description</th>
<th>Time Period</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sign-up for the Sandbox</td>
<td>-</td>
<td>Complete the <a href="#">Google form</a></td>
</tr>
<tr>
<td>2</td>
<td>Submit Materials</td>
<td>Within 1 to 4 weeks after you sign-up</td>
<td>Submit a back-up of your studbook database and MULT list (following data entry conventions provided prior to migration, assuming your studbook has MULTs) to <a href="mailto:PMC@LPZoo.org">PMC@LPZoo.org</a> by the date materials are due. Deadlines are determined by Species360 when you sign-up to migrate to the Sandbox. Please note that you should continue to maintain your studbook database in SPARKS/PopLink software until your studbook migrates to the Live version of ZIMS for Studbooks (step 9).</td>
</tr>
<tr>
<td>3</td>
<td>Migration to ZIMS for Studbooks Sandbox</td>
<td>Varies due to numbers of studbooks in queue but often within 1 week</td>
<td>Species360 migrates your studbook into the ZIMS for Studbooks Sandbox testing environment and makes it available to Studbook Keeper.</td>
</tr>
<tr>
<td>4</td>
<td>ZIMS for Studbooks Sandbox Access Granted</td>
<td>Within days after Species360 migrates your studbook into the Sandbox</td>
<td>Reviewers will communicate with the Studbook Keeper, who should then verify data migrated correctly, check exports, and determine if the data are fit to migrate to ZIMS for Studbooks Live.</td>
</tr>
<tr>
<td>Step</td>
<td>Step</td>
<td>Time Period</td>
<td>Description</td>
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</tr>
<tr>
<td>5</td>
<td>Testing, learning, and exploring Sandbox version of ZIMS for Studbooks</td>
<td>Undetermined amount of time</td>
<td>Studbook Keeper should confirm the correct taxonomy, scope, MULT list, and Studbook Keeper in the Sandbox prior to deciding to migrate to Live. This will ensure that the final migration to Live is correct. Please see the Species360 document on taxonomy. Once the Studbook Keeper, SSP Coordinator and Population Biologist agree that the studbook database is ready to migrate to ZIMS for Studbooks Live, Studbook Keeper will notify the Studbook Analyst and share the updated studbook and MULT list, so the Studbook Analyst can notify Species360 that the studbook is ready for the final migration to Live. If there are concerns about moving the studbook from the Sandbox to Live, discuss these with your reviewer and the Studbook Analyst to determine if it makes more sense to stay in the Sandbox for a bit longer.</td>
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**Once your studbook is Scheduled to Migrate to the Live version of ZIMS for Studbooks**

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<th>Step</th>
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<th>Time Period</th>
<th>Description</th>
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<tr>
<td>6</td>
<td>Training</td>
<td>First Week</td>
<td>Training Instructional Email - Training Documents, Webinar Sign up, How to Use Walk Me will be sent in an email from Species360</td>
</tr>
<tr>
<td>7</td>
<td>Final Proof by Studbook Keeper</td>
<td>Second Week</td>
<td>Proofing Migration Instructional Email - Data validation and location validation checks for migrated studbook; explanation for new studbooks will be sent in an email from Species360</td>
</tr>
<tr>
<td>8</td>
<td>Knowledge and Understanding Review</td>
<td>Third Week</td>
<td>Knowledge Review Instructional Email - Test your knowledge and understanding of the software and its tools will be sent in an email from Species360</td>
</tr>
<tr>
<td>9</td>
<td>Final Materials Due</td>
<td>Fourth week</td>
<td>Following the aforementioned emails, PMC will send a request for your final materials. Submit all final materials to <a href="mailto:PMC@lpzoo.org">PMC@lpzoo.org</a>. Your</td>
</tr>
<tr>
<td>Step</td>
<td>Step</td>
<td>Time Period</td>
<td>Description</td>
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<td>studbook will then be deployed to Live on the next ZIMS for Studbooks migration sprint day by Species360, which typically occurs once a month.</td>
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Migration is complete and studbook is available in Live (Studbooks migrate to Live only once and cannot be re-migrated again.)
SANDBOX SIGN UP: How do I sign up for the ZIMS for Studbooks Sandbox/testing area?

There are three easy steps:

1. Studbook Keepers must sign up using the following link to the Sandbox.
2. After the Studbook Keeper signs up, they must send their SPARKS/PopLink studbook database to the PMC Studbook Analyst, Kelvin Limbrick, at pmc@lpzoo.org using WeTransfer.com with the subject line “Backup for Studbook Testing Sandbox”: Detailed instructions.
3. If the studbook does not have any MULT parents entered, then skip step 3. If the studbook database has any MULT parents entered, then you must also send a MULT list to pmc@lpzoo.org along with your studbook. Info for how to create a MULT list can be found here. After Species360 migrates the studbook to the Sandbox, all Studbook Keepers will receive an electronic notification with information regarding the migration.
   - A Studbook Keeper at a non-Species360 member facility will receive additional assistance regarding login information from Species360. If you do not receive a login after your studbook has migrated into the sandbox or have an issues with your ZIMS account, contact Support@Species360.org.

EMAILING STUDBOOKS: How do I email a studbook database?

To send a studbook via email to Species360, PMC, or anyone else, use this link for helpful instructions on how to do so.

ACCESS & ROLES: Who can access a studbook database in ZIMS for Studbooks?

APM Committee, PMC, and Species360 are working together to create guidelines to outline appropriate levels of access to data, and help Studbook Keepers decide who may receive access to their studbook database; additional guidance will be shared as it is created. For now, if access for anyone other than the Studbook Keeper or SSP Coordinator is needed, contact the PMC Studbook Analyst (pmc@lpzoo.org) or Rebecca Greenberg/Animal Programs Coordinator (RGreenberg@AZA.org). Both the Studbook Keeper and SSP Coordinator must approve any other individual hoping to gain access to an AZA studbook; Species360 cannot provide access to a studbook without AZA approval.
**MIGRATION PROCESS:** How are the Population Biologists involved in the migration process with the Sandbox and Live versions?

Each Animal Program works with a Population Biologist to offer assistance, analyze data, and ultimately produce Breeding & Transfer Plans. As a result, Population Biologists are also working to increase their knowledge and expertise in the ZIMS for Studbooks formats. Program Leaders must discuss the final migration process from the Sandbox to Live version of ZIMS for Studbooks when the time occurs. Population Biologists will be able to export data from a studbook in ZIMS for Studbooks for use in creating a PMx project, which in turn will be used when making management decisions for the population (such as a Breeding & Transfer Plan).

**MIGRATION TO LIVE:** How do Studbooks migrate from the Sandbox to Live ZIMS for Studbooks?

To migrate from the **Sandbox** to **Live** version of ZIMS for Studbooks, the Studbook Keeper and reviewer must both agree that the data set is “ready” to migrate. Reviewers will be an assigned PMC Staff member or Adjunct Population Biologist. If a separate SSP Coordinator exists, it is strongly recommended that this individual also be included in the decision. Once all are in agreement, the Studbook Keeper should email PMC Studbook Analyst, Kelvin Limbrick, at pmc@lpzoo.org, who can then notify Species360. A new, updated copy of the studbook (from SPARKS or PopLink) will be requested at this time. Species360 will migrate this studbook database to Live on their next scheduled migration date (typically once a month).

Studbook Keepers are encouraged to use their time in the **Sandbox** version to explore the software and learn about the functionality. This experience is meant to prepare people for true migration to the **Live** version. In most cases, after this occurs, there should be no reason to keep entering data into former versions of the studbook in SPARKS or PopLink. Feel free to check with the PMC at pmc@lpzoo.org if you have any questions about this.

**TRAINING:** How can Program Leaders receive training and learn more about ZIMS for Studbooks?

AZA’s Professional Development Committee (PDC) and staff are working with the Transition Leadership Team and Species360 to provide training and materials for our AZA community. This includes revisions to AZA’s Population Management I and II courses, training sessions at AZA Annual Conference and Mid-Year Meetings, and advanced training opportunities for population biologists. For specific training within AZA, contact azatraining@aza.org for more information.

Species360 already provides a variety of resources for learning about, and working in, the ZIMS for Studbooks module:

- **Monthly webinars** focused on getting started with ZIMS for Studbooks; [sign up here](#)
• **Video library** of past webinars about ZIMS for Studbooks functionality and general **ZIMS for Studbooks tips and tricks**.

• **ZIMS for Studbooks Index**, including documents, PowerPoints, and videos related to ZIMS for Studbooks.

  Document library of “ZIMSHelp” guides, containing all ZIMS help materials (must log into ZIMS for access).

Contact Species360 support (support@species360.org) for more information about any technical aspects of the software.

Contact the PMC Studbook Analyst (pmc@lpzoo.org) for more information about AZA-specific studbook and policy questions.

**INITIAL STEPS: What are some initial steps for Studbook Keepers to take after migrating their studbook to ZIMS for Studbooks?**

There are no current, formal AZA reference guides for Program Leaders taking their initial steps after migrating their studbook to ZIMS for Studbooks – **Sandbox** or **Live**. However, Species360 and EAZA have created helpful documents to guide linking, pending updates, and data clean up:

- **Linking**
- **Updates**
- **Data clean-up**
**CONTACTS: Whom to contact?**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Person</th>
<th>Role</th>
<th>Email</th>
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<tbody>
<tr>
<td>Transition Leadership Team questions; APM Committee/Animal Program Questions</td>
<td>See “ZIMS for Studbooks – APM Committee Transition Leadership Team” chart</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AZA migration, studbook data conventions, Sandbox sign up, testing process, giving others access to your studbook database</td>
<td>Kelvin Limbrick</td>
<td>AZA PMC</td>
<td><a href="mailto:pmc@lpzoo.org">pmc@lpzoo.org</a></td>
</tr>
<tr>
<td>AZA accountability, giving others access to your studbook database</td>
<td>Rebecca Greenberg</td>
<td>AZA</td>
<td><a href="mailto:RGGreenberg@AZA.org">RGGreenberg@AZA.org</a></td>
</tr>
<tr>
<td>Training in AZA</td>
<td>Amy Rutherford</td>
<td>AZA</td>
<td><a href="mailto:arutherford@aza.org">arutherford@aza.org</a></td>
</tr>
<tr>
<td>Population Management I and II courses</td>
<td>Ashley Wynne-James</td>
<td>AZA</td>
<td><a href="mailto:AWynne-James@aza.org">AWynne-James@aza.org</a></td>
</tr>
<tr>
<td>Discussing when to migrate to Live</td>
<td>Your Population Biology Advisor</td>
<td>PMC, Adjunct, SPMAG</td>
<td>You should have this email, but if not, contact Kristine Schad Eebes at <a href="mailto:kschad@lpzoo.org">kschad@lpzoo.org</a></td>
</tr>
<tr>
<td>ZIMS for Studbooks software technical questions</td>
<td>Species360 Support</td>
<td>Species360</td>
<td><a href="mailto:support@species360.org">support@species360.org</a></td>
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**CONTACTS: ZIMS for Studbooks – APM Committee Transition Leadership Team**

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<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
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<tbody>
<tr>
<td>Stacey Johnson</td>
<td>APM Committee - Chair</td>
<td><a href="mailto:SJohnson@sandiegozoo.org">SJohnson@sandiegozoo.org</a></td>
</tr>
<tr>
<td>Harrison Edell</td>
<td>APM Committee – Vice-Chair of Studbooks &amp; SSPs</td>
<td><a href="mailto:Harrison.Edell@dallaszoo.com">Harrison.Edell@dallaszoo.com</a></td>
</tr>
<tr>
<td>Joe Barkowski</td>
<td>APM Committee - Member</td>
<td><a href="mailto:jcbski@aol.com">jcbski@aol.com</a></td>
</tr>
<tr>
<td>Kristine Schad Eebes</td>
<td>PMC - Director</td>
<td><a href="mailto:kschad@lpzoo.org">kschad@lpzoo.org</a></td>
</tr>
<tr>
<td>Kelvin Limbrick</td>
<td>PMC – Studbook Analyst</td>
<td><a href="mailto:KLimbrick@lpzoo.org">KLimbrick@lpzoo.org</a></td>
</tr>
<tr>
<td>Candice Dorsey</td>
<td>AZA - Senior Vice President Conservation, Management &amp; Welfare Sciences</td>
<td><a href="mailto:CDorsey@AZA.org">CDorsey@AZA.org</a></td>
</tr>
<tr>
<td>Rebecca Greenberg</td>
<td>AZA - Animal Programs Coordinator</td>
<td><a href="mailto:RGGreenberg@AZA.org">RGGreenberg@AZA.org</a></td>
</tr>
<tr>
<td>Amy Rutherford</td>
<td>AZA - Director of Professional Development &amp; Education</td>
<td><a href="mailto:ARutherford@AZA.org">ARutherford@AZA.org</a></td>
</tr>
<tr>
<td>Andi Kornak</td>
<td>PDC - Chair</td>
<td><a href="mailto:amk@clevelandmetroparks.com">amk@clevelandmetroparks.com</a></td>
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| Bob Wiese | APM Committee – Past Chair  
Species360 Board Member | bwiese@sandiegozoo.org |