How to Publish a Studbook using ZIMS for Studbooks

1. Open a new Microsoft Word Document, or the Studbook Publication template
2. Create a Cover page with the following:
   a. Species common and scientific name
   b. Studbook keeper name, institution, and contact information
   c. Geographical scope of the data (e.g. North American, International)
   d. Date that the studbook data is current to
      i. The date of the first update response following a solicitation of institutional updates
   e. Date of the studbook publication
   f. Photo of species with photo credit
3. Create a Table listing the Living Population
   a. Open your studbook in ZIMS for Studbooks
   b. Under ‘All Animals In Studbook’ select ‘View List’
   c. Check the ‘Show History’ box next to the search bar
   d. Select the ‘Export List to Excel’ icon in top right corner:
   e. Open the Excel Export and format according to the following
      i. Delete rows 1-4 the last row in the table that states “Copyright, Species360, 2017. All rights reserved.”
      ii. Select all cells
      iii. Select ‘Sort & Filter’ in the upper right corner of Excel:
      iv. Select ‘Custom Sort’
      v. Under Column, sort by: ‘Current Location’
      vi. Under Sort on, select ‘Values’
      vii. Under Order, select A to Z
      viii. Verify the ‘My data has headers’ box is checked in the upper right corner, select ‘Ok’
      ix. In the upper left corner, Select ‘Sort & Filter’ > ‘Filter’
         1. Select the arrow next to ‘Current Status’ (column G) and check only ‘Alive’
         2. Hit ‘Okay’
         3. Only animals with “Alive” written in the column G cells should be showing.
   f. Select all data in columns A -J and copy and paste into studbook document
      i. Note: prior to pasting, navigate to end of the text in the publication document where the table will go use a ‘Page Break’ then change the ‘Orientation’ to ‘Landscape’ and set the ‘Margins’ to ‘Narrow’
         1. Word 2016: Select ‘Layout’ > ‘Breaks’ > ‘Break to next page’
   g. Format the table
      i. Highlight the entire table
      ii. Right-click the table and select ‘Table Properties…’
      iii. In the ‘Row’ tab, uncheck ‘Allow row to break across pages’ and click ok
      iv. Highlight the header row (i.e. first row) of the table
      v. Right click over the header row and select ‘Table Properties…’
      vi. In the ‘Row’ tab, check ‘Repeat as header row at the top of each page’ and click ‘Ok’
      vii. Highlight the entire table again and change the font size to 10
4. Create a Table including the entire Historical Population
   a. In the original Excel Export, Select ‘Sort & Filter’ > ‘Filter’
      i. Select the arrow next to ‘Current Status’ (column G) and where you previously selected ‘Alive’ only, check ‘Dead,’ ‘LTF,’ and ‘Released’
      ii. Hit ‘OK’
      iii. Only animals with “Dead” written in the column G cells should be showing.
b. Sort individuals by Studbook ID
   i. Select all cells
   ii. Select ‘Sort & Filter’
   iii. Select ‘Custom Sort’
   iv. Under ‘Column,’ Select ‘Sort By:’ ‘Studbook ID’
   v. Under ‘Order’ Select ‘A to Z’

1. You may receive a pop-up asking how to sort the studbook IDs. Select ‘Sort anything that looks like a number, as a number’

2. If column letters (e.g. Column A, Column B, etc.) display in the drop down rather than column titles, verify ‘My data has headers box is checked’

c. Select all data in columns A - J and copy and paste into studbook document below the Living Population table

   i. It might be helpful to navigate to end of the text before where the table will go select ‘Layout’ > ‘Breaks’ > ‘Break to next page’ then rotate the ‘Orientation’ to ‘Landscape’ and set the ‘Margins’ to ‘Narrow’

d. Select all data in columns A - J and copy and paste into studbook document

   i. Note: prior to pasting, navigate to end of the text in the publication document where the table will go use a ‘Page Break’ then change the ‘Orientation’ to ‘Landscape’ and set the ‘Margins’ to ‘Narrow’

      1. Word 2016: Select ‘Layout’ > ‘Breaks’ > ‘Break to next page’


5. Create a Table of the Mnemonics for the Current Institutions

   a. In the ZIMS for Studbooks webpage, select ‘See Institution List’ from main menu located next to ‘See Overview.’

   b. Select ‘Current’ from toolbar on left side of screen

   c. Select ‘Export Current Displaying List To Excel’ button in the upper right hand corner

   d. Open the Excel export and copy and paste the whole table into studbook document

   e. Select all data in columns A - J and copy and paste into studbook document

5. Create a Table of the Mnemonics for the Current Institutions

   i. Note: prior to pasting, navigate to end of the text in the publication document where the table will go use a ‘Page Break’ then change the ‘Orientation’ to ‘Landscape’ and set the ‘Margins’ to ‘Narrow’

      1. Word 2016: Select ‘Layout’ > ‘Breaks’ > ‘Break to next page’


6. Create a Table of the Mnemonics for the Historic Institutions

   a. Repeat step 6 a-e selecting ‘Historic’ instead of ‘Current’

7. Add any extra information that you deem important to your studbook (e.g., natural history, husbandry, bibliography)

8. Include the following list of Data Field Descriptions (These are the default definitions. Change them to reflect any differences in your studbook) in the publication

   **Studbook ID** – unique number assigned to each individual in the studbook. The studbook number is a permanent number.

   **Birth Date** – This field indicates the date of an animal’s birth. There is a birth date for every individual. Please check the next column ‘Birth Date Est.’ to judge the accuracy of that date.

   **Birth Date Est.** – Indicated if the Birth Date field is an estimate.

      None = No estimation

      Day = The day is estimated

      Month = The month is estimated

      Year = The actual birth date is within the year of the Birth Date field

   **Sire/Dam** –

      Numbers indicate the Studbook ID of the parents of the zoo born animals

      WILD indicates that an animal was wild caught and its parents are unknown wild individuals

      UNK indicates that the animal was zoo-born but identification of the parents is not known
MULT indicates that there are several possible parents in zoos, but the specific one could not be determined. A parental assumptions note in the Specimen Notes field is included with this parental designation to indicate which animals could be the potential parent.

**Sex** – male, female, unknown

**Event** – This field documents the movements of individual animals from the first location to the current or last known location. This includes Birth/Hatch, Transfer, Death, Go LTF (Lost to Follow up), Return from LTF, and Release. UNKNOWN indicates that the animal exists or existed, but its location cannot be reliably confirmed.

**Location** – This field indicates the location where the event took place.

**Local ID** – This is the number assigned by the institution in which the event took place. UNKNOWN indicates that either an ID was not assigned or no information exists to indicate that an ID was assigned.

**Date** – This field documents the date that events occurred. Each event has a date associated with it. Also, check the adjacent column (Date Est.) to determine the accuracy of this date.

**Date Est.** – Indicates if the adjacent Date field is an estimate.

- None = No estimation
- Day = The day is estimated
- Month = The month is estimated
- Year = The actual date is within the year of the Event Date field

**House Name** – This field indicates the name given to the animal at a specific location. Individuals may be given a different house name each time they move to a different location.

9. Add any data conventions used in your studbook database

10. Update the Studbook Disclaimer found in both the template and the handbook with today’s date and Studbook Keeper institution

    a. Insert this disclaimer into the end of the Studbook document

11. Add the following disclaimer in addition to the Studbook Disclaimer

    a. *These studbook data are being maintained in ZIMS for Studbooks, which does not currently have a Studbook Report export function; therefore, the historic events (e.g., births, transfers) for each individual are not included in this studbook publication document. This current altered format without the historic events is temporarily acceptable for the AZA Studbook Publication. If you have questions about the historic events of an individual in this studbook, please contact the Studbook Keeper.*

12. Add or update the Table of Contents on the page following the cover to match the page numbers and section titles of your publication

13. Save studbook publication as a PDF

14. E-mail a copy of the Studbook Publication PDF with a note that this is a ZIMS for Studbooks database to both Conservation@AZA.org and PMC@LPZoo.org.

15. For larger PDF files, please use your preferred file sharing site, such as DropBox or WeTransfer.com

16. If you do not receive a confirmation email from AZA, please contact them again to make sure they received your publication.