# 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 of the Current, 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:
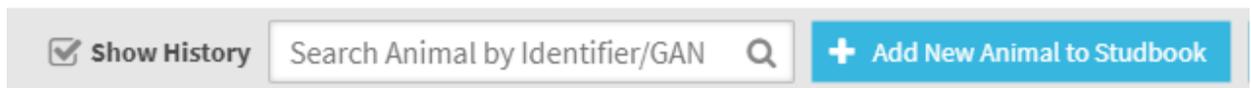
   d. To create list of just living animals:
      i. Click down arrow for filter toolbar, just above the header list for the SB
   ii. Then select 'Alive' in Status field, and click 'Search':

   e. Then sort by Current Location (A to Z) by clicking the 'Current Location' tab in the header

   f. Select the 'Export List to Excel' icon in top right corner:
      i. This should export a file to your downloads folder

   g. Open the Excel Export and format according to the following:
      i. Delete rows 1-4: The "Global/Regional Association," "Studbook Name," "Date of Export" & "Studbook Animals" rows.
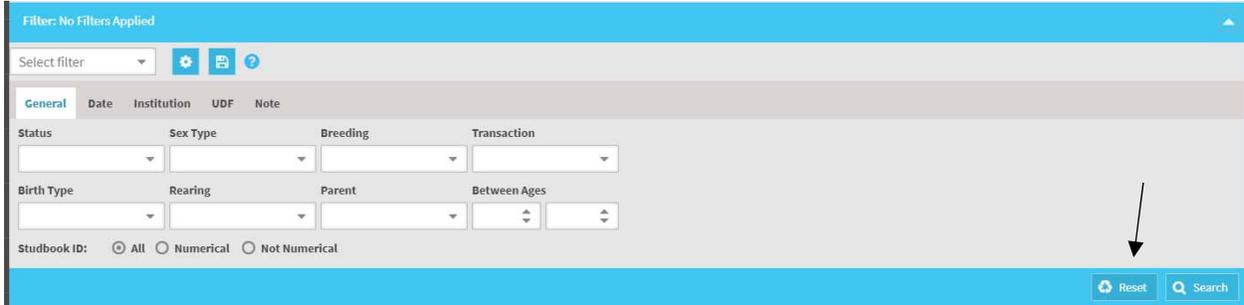   ii. Also delete "Copyright, Species360, Year. All rights reserved" at end of table.

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h. Select all cells holding data that should be presented in a SB publication and copy and paste into studbook document you created in Steps 1 & 2 or the template from Step 1. You may want to delete some columns prior to copying according to what information has historically been presented in SB publications for this species. Common columns include: Studbook ID, Event History, Current Location, Current Local ID, Sex, Hatch/Birth Date, Sire, Dam, Hatch/Birth Type.

    i. **Note**: prior to pasting, make sure the page to which you are pasting has 'Orientation' set to 'Landscape' and 'Margins' set to 'Narrow' (Narrow dimensions = 0.5/0.5/0.5/0.5)

i. 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 (or smaller if needed)

    viii. Highlight the entire table and add borders to table by selecting 'Borders' -> 'All Borders'
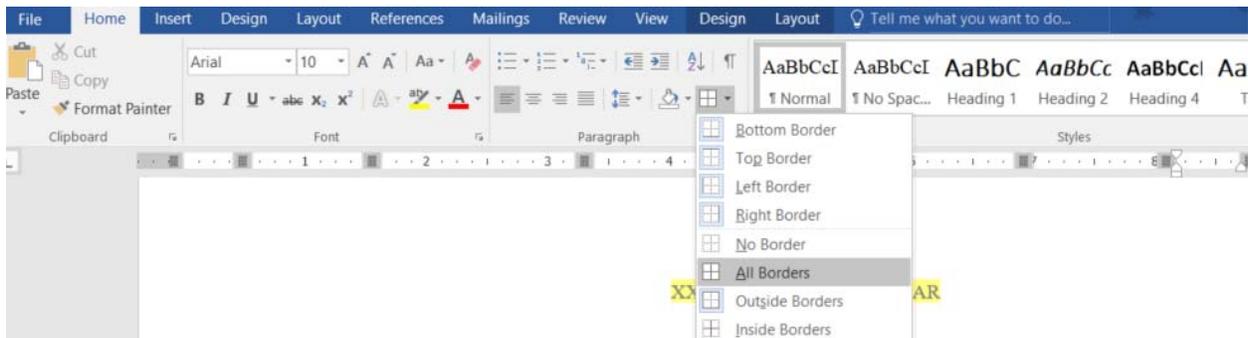
    ix. Adjust column widths such that all table columns can be seen on a single page

    x. Rename any column headers as appropriate
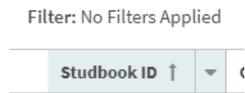
4. Create a Table of the entire Historical Population
   a. In ZIMS:
      i. Under 'All Animals In Studbook' select 'View List'
      ii. Remove any filters by going to filters and clicking 'Reset:'

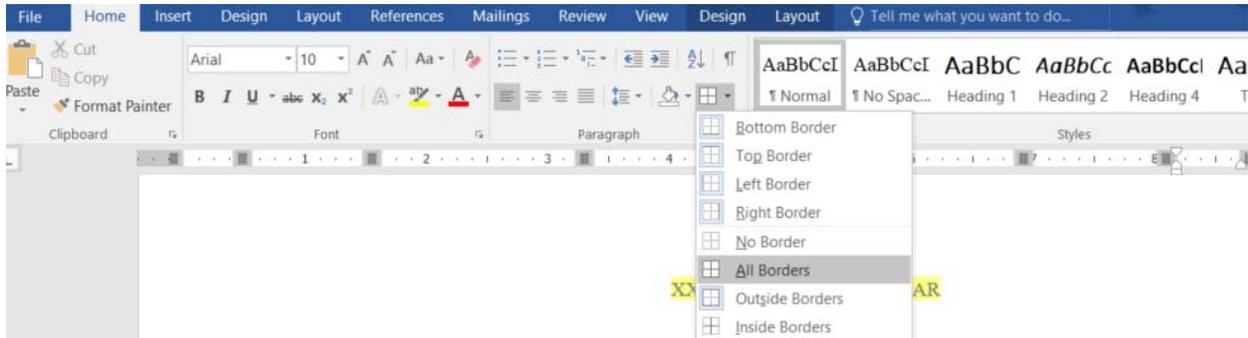   iii. Check the 'Show History' box next to the search bar:

   iv. Sort by Studbook ID by selecting the 'Studbook ID' tab in the header:

   b. Export to excel by selecting the 'Export List to Excel' icon in top right corner:
      i. This should export a file to your downloads folder

   c. Open the Excel Export and format according to the following:
      i. Delete rows 1-4: The "Global/Regional Association," "Studbook Name," "Date of Export" & "Studbook Animals" rows.
      ii. Also delete "Copyright, Species360, Year. All rights reserved" at end of table.
   d. Select all cells holding data that should be presented in a SB publication and copy and paste into studbook document you created in Steps 1 & 2 or the template from Step 1. You may want to delete some columns prior to copying according to what information has historically been presented in SB publications for this species. Common columns include: Studbook ID, Event History, Current Location, Current Local ID, Sex, Hatch/Birth Date, Sire, Dam, Hatch/Birth Type.
      i. **Note**: prior to pasting, make sure the page to which you are pasting has 'Orientation' set to 'Landscape' and 'Margins' set to 'Narrow' (Narrow dimensions = 0.5/0.5/0.5/0.5)
   e. 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 (or smaller if needed)

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      viii.   Highlight the entire table and add borders to table by selecting 'Borders' -> 'All Borders'

      ix.   Adjust column widths such that all table columns can be seen on a single page
      x.   Rename any column headers as appropriate

5. **Create a Table of the Mnemonics for the Current Institutions**
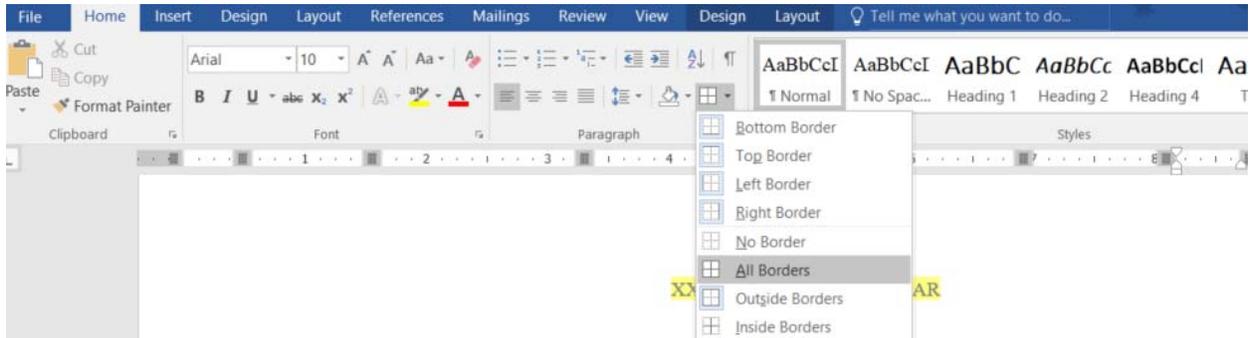   a. From your studbooks dashboard in ZIMS, select 'View List' under the 'Living Animals in Studbook' section
   b. Select 'Tools' on the left-side tool bar and then 'Institutional Holdings'
   c. Select 'Current' for 'Report Scope' near top of screen

   d. Select 'Export List To Excel' button in the upper right-hand corner ⟶
      i. This should export a file to your downloads folder

   e. Open the Excel export in excel
      i. Delete rows 1-4: The "Global/Regional Association," "Studbook Name," "Date of Export" & "Studbook Animals" rows.
      ii. Also delete "Copyright, Species360, Year. All rights reserved" at end of table.
   f. Select all cells holding data that should be presented in a SB publication and copy and paste into studbook document you created in Steps 1 & 2 or the template from Step 1. You may want to delete some columns prior to copying according to what information has historically been presented in SB publications for this species.
   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

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viii. Highlight the entire table and add borders to table by selecting 'Borders' -> 'All Borders'

ix. Adjust column widths such that all table columns can be seen on a single page
x. Rename any column headers as appropriate

6. **Create a Table of the Mnemonics for the Historic Institutions**
   a. Repeat step 5 a-g selecting 'Historic' in the 'Report Scope'

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 in the publication. These are the default definitions; please update to reflect any differences specific to your studbook.**

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

   GAN – Global Accession Number; unifying "key record" under which all animal data for that individual is tracked.

   Birth/Hatch Date – This field indicates the date of an animal's birth/hatch. There is a birth/hatch date for every individual. If there is any estimate surrounding this date it will be reflected in this field.

   Sire/Dam – Numbers reported in this field indicate the Studbook ID of an animal's parents, when those parents are known. "WILD" indicates that an animal was wild caught and its parents are unknown, wild individuals. "UND" indicates that the parentage of that animal is undefined. "MULTX," where X is a number, indicates that there are several possible parents, but the specific parent could not be determined. The possible parents within any given MULT are tracked within ZIMS and will be listed when you expand the 'Parent' field for that individual.

   Sex – male, female, undetermined

   Event – This field documents the movements (i.e. transactions) 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. "-" 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 any given event occurred. Each event has a date associated with it. If there is any estimate surrounding this date it will be reflected in this 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.

Birth/Hatch Type – indicates whether the individual was born/hatched in the wild or a captive environment. Undetermined indicates the birth/hatch type is not known.

9. **Add any data conventions used in your studbook database**

10. **Update the Studbook Disclaimer, found in either the template or the handbook, with today's date and Studbook Keeper institution**
    a. **Insert this disclaimer into the end of the Studbook document**

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

12. **Save studbook publication as a PDF**

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

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

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

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