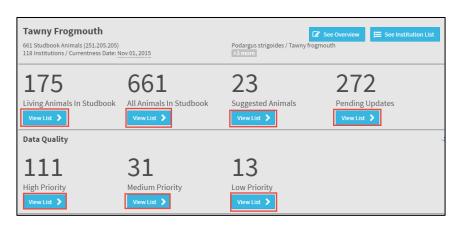


Studbook Data Validation Checklist

After your studbook is first migrated (data put into ZIMS) from your legacy (SPARKS or Poplink) software we ask that you do some data validation checks to make sure everything is correct. This document will help guide you through these checks. Check off the topic when it is completed. For any questions or discrepancies you cannot fix contact support@Species360.org.

Reports and Tools

To find the ZIMS Studbook Reports and Tools select to View List from any of your studbook filters in your dashboard.





The left hand dashboard will open. Tools (and your Reports) are found at the bottom.

Data Migration Validation Report

This report provides counts for specific categories such as sex, birth dates and transactions for both your studbook in the legacy (SPARKS or PopLink) software and ZIMS. In most cases these numbers should match. However, there are two circumstances where they may not:

- Transaction Count may be off
 - ZIMS requires that a studbook record begin with a Birth (the Origin transaction). If the data in your legacy software did not start with a Birth, ZIMS has created one. For example if your legacy studbook started with a Collected From Wild transaction, ZIMS has created the Wild Birth transaction. This would result in an additional transaction count in ZIMS.
- Institution Count may be off
 - Species360 is converting geolocations entered as institutions into local institutions. This will increase the number of local institutions in ZIMS.

If your counts are off and it is not due to one of the reasons above, contact <u>support@Species360.org</u> and they can review the data in both your legacy software and in ZIMS.



Census Report

You should generate a Census report from your legacy (SPARKS or PopLink) software from the most recent year. Then generate a report in ZIMS using the same parameters as you did for the legacy report.

- Compare the numbers in the reports with each other
- If they do not match you can try running reports in both legacy and ZIMS using different parameters that match to help you locate where the problem may be
- If you cannot find the discrepancies and correct them contact support@Species360.org.

Data Quality List

You will need to find out if the Data Quality count and type of errors in your ZIMS studbook matches those in your legacy software. Data Quality is found right above Tools in the left hand Dashboard where the total numbers of errors is listed. Data Quality by priority (with the numbers in each priority level) is also found at the bottom of the main Dashboard.

Suggested 272 Updates	Sibling Anima	175 Living Animals In Studbook	661 All Animals In Studbook	23 Suggested Animals View List
162 Data Quality		Data Quality 117 High Priority View List	32 Medium Priority View List	13 Low Priority View List >

Depending on if you used SPARKS or PopLink some of the codes may be different, not used, or be new ones. Use the ZIMS Help Menu in the upper right hand corner to find a document that details all of the Data Quality codes.

How can we help you?	8	How can we help you?	
Type in your question	Q	Type in your question	
WalkMe ZIMS Help Overview (PDF) (PDF) This document discusses the integrated help system in ZIMS called 'WalkMe. Getting Started Studbook Topics Husbandry Topics	>	 Studbook Keeper Navigation Overview ((PPT) ZIMS for Studbooks keeper navigation overview. Studbook Keeper Set Up (PPT) (PPT) ZIMS for Studbooks keeper book set up. Studbook Keeper Data Entry (PPT) (PPT) ZIMS for Studbooks keeper data entry. Studbook Keeper Reports, Tools & Trac (PPT) ZIMS for Studbooks keeper reports, tools and 	
Medical Topics	>	Studbooks Data Quality Codes (External. (External Link) ZIMS for Studbooks data quality error types and suggestions on how to correct the errors.	
Administrative Topics	>	Studbook- Add or Edit Description	
		Studbook- Add Institution	
Training Library	>	Studbook- Add Institutional Contact	
Webinars and Videos	>	 Studbook- Add Institutional Note Studbook- Add New Animal 	



Studbook Overview

You should then look into some of the setup information for your studbook to confirm that it migrated correctly. This information is found by selecting See Overview from your studbook dashboard.

Rhinoceros unicornis Set Sudson A. (2015) (2012) 113 holds un rCommittees Date Der 11, 2017		Brocense anarras / Die-Introd Annaero	
terian Portan Image: A constraints in Studbook Image: A constraints in Studbook	540 All Animals in Studbook	82 Suggested Animals	412 Pending Updates
Data Quality 6 High Priority Venetal >	16 Medium Priority View List >	O Low Priority Veretual 2	

Number Settings

Is the "Next Studbook ID to be used" and the "Next Temporary Studbook ID to be used" correct? Select "Studbook Number Settings" once the overview is opened.



Studbook Number Settings							
Studbook ID settings							
Current Studbook ID settings							
Last Studbook ID used	1840						
Next Studbook ID to be used	1841						
Temporary Studbook ID settings							
Current Temp Studbook ID settings							
Last Temp Studbook ID used	DRAFT 23						
Next Temp Studbook ID to be used	E107						

Note that the "Last Studbook ID Used" field will not populate until you enter data directly into ZIMS.

Basic Information



To edit information in the Basic Information section select the Edit Details option. The topics can be expanded by selecting the "+".

Basic Information		
		🞜 🔕 🗸 📝 Edit Details
Global/Regional Association	Studbook Name	Total Specimens in Studbook
Association of Zoos & Aquariums (AZA) / AZA	Tawny Frogmouth	661 (251.205.205)
Currentness Date	Studbook Start Date	Last Edited
Nov 01, 2015		Jun 01, 2017
🛱 Description		
🛛 Species Notes		
- D Conventions/Assumptions		

Check that your Currentness Date is correct. This date is not the last date that you entered data into your studbook, that date is the Last Edited date. Currentness Date is the date you feel your studbook is complete and current. In the legacy software this would be the date the studbook was last "published". Currentness Date is displayed in the dashboard header.

Expand the Description, Species Notes and Conventions/Assumptions and confirm that information is correct.

Taxonomy Details

Make sure the Taxonomy is correct and that any sub-species included in your studbook are noted. Also check the Incubation/Gestation Periods and Maximum Hatch/Birth Date Range for Clutches is correct. Use the Edit Details option if necessary.

Taxonomy Details							
😂 🔹 🗸 🐼 Edit Details							
T-una (Far Lavian)	Incubation Period (days)			Incubation Period for calculations			
Taxonomy (Egg Laying)	Minimum	Average	Maximum	Incubation Period for Calculations	Max. Hatch Date Range for Clutch		
Podargus strigoides / Tawny frogmouth	10	10	10	Avg	3		
Podargus strigoides strigoides / Eastern tawny frogmouth	7	8	8		3		
Podargus strigoides brachypterus / Western tawny frogm	8	8	8		3		
Podargus strigoides phalaenoides / Northern tawny frogm	8	8	8		3		



Assignments

Check that the Assignments are correct. You will probably only see yourself assigned as Studbook Keeper, but ZIMS has the ability to assign other responsibilities such as SSP Coordinator, Veterinarian and Nutrition Advisor.

User Defined Fields (UDF)

Make sure that your User Defined Fields migrated correctly. Also, check a few UDF grids in the records to see if they were applied correctly.



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Institutions

To check your institutions select See Institution List from your dashboard.

Tawny Frogmouth 661 Studbook Animals (251.205.205) 118 Institutions / Currentness Date: N	lov 01, 2015	Podargus strigoides / Tawny fro +3 more	See Overview
175 Living Animals In Studbook	661 All Animals In Studbook View List	23 Suggested Animals View List	272 Pending Updates View List >

Local Institutions

To find any Local Institutions that you entered in your studbook select the Local option in the left hand dashboard.

	Tawny Frogm
	Select Insti
DASHBOARD	Institu
13573	(closed
	1 Stop
3 LOCAL	1000 Hi
65	1001 Ar
CURRENT	101 Rar
137	113021
HISTORIC	2017JA
	2017 14

Select the Institution Name hyperlink in the results list and add any information that may be missing if you know it.

Taw	Tawny Frogmouth > Local Institutions							
Se	Select Institution Q + Add new local institution							
	Institution N	ame	Mnemonic	Coun				
*	FOEHL							
*	J.SPOONER							
*	KOTZ R							

Animal Data

You then need to confirm that your Animal Data migrated correctly



] Taxonomy

Make sure that all your animals are in a current taxonomy. Historical taxonomies will say "OBSOLETE". To check this select View List for All Animals in Studbook from your dashboard. Sort the Animal List by Taxonomy to see this at a glance.

Tawny Frogmouth							
661 Studbook Animals (251.205.205) 118 Institutions / Currentness Date: 1	Podargus strigoides / +3 more						
175	661	23					
Living Animals In Studbook	All Animals In Studbook	Suggested Anima					
Data Quality							

If you have multiple taxa in your studbook, check to make sure you are receiving updates for your included subspecies. Select View List for Pending Updates in your dashboard to check this.



Filter by Taxonomy and check for updates for your subspecies.

Total: 247 (11	Total: 247 (116.104.27) at 90 Institutions							
Parent Taxonomy	Sex Contracep	otion Rearing	Transactions					
Studbook ID		Sex Type		Sire	Dam	Taxonomy ↓	ast Modifi	
1616		Female		1200	1399	Podargus strigoides strigoides / Eastern tawny fro		
6 Pending Updates 3 Rearing, 3 Taxonomy								
1733		Male		1731	1732	Podargus strigoides / Tawny frogmouth		
	1 Pending Updates	1 Parent						
1121		Female		1025	1014	Podargus strigoides / Tawny frogmouth		
	1 Dending Undates	1 Sev						

If you migrated from SPARKS, do your hybrid animals, if you have any, have a checked hybrid box? To check this open the animal record and expand the Taxonomy grid.



Taxonomy								
			🗹 Hybrid 😷 🔂 🕶 🔳					
Taxonomy	Taxonomy Determination	Date	Reported By					
Podargus strigoides / Tawny frogmouth	Undetermined	Oct 01, 2005	Data Migration Process					

MULT Parents

Check that you can find your MULTs in the MULT list and that all the potential parents are listed. To check this open the Parent grid in any animal record and select Change Parent Info.

Pa	Parent 🔹 🗖					
			ລ	Change parent info	🕰 🔻	•
	Parent	%pct	Recorded By	14		
DAM	1732	100	Data Migration Pr	ocess		
SIRE	1731	100	Data Migration Pr	ocess		

Scroll through the dropdown list next to "Choose MULT" in the Parent grid.

Change Parent Info					
Sire	Choose Mult:	Filter mults/anir	nals 🔻	٠	Da
Parent		MULT3 Animals			
1174		WILD DRAFT 4		Û	
		MULT2 Animals 1110 1033			
Add New		MULT Animals 1569		ed: 0	Ad
Parent Notes		1594 1592			
Date Comment					
No notes to display.					

Check that all the offspring are listed in the "Used In" column in MULT manager by selecting the gear icon.

Change Parent Info										
Sire		Filter mults/a	animals 🔻	٠	Dam	Choose Mult: Filter	mults/a	animals	*	٠
Parent			% (pct)		Parent			% (pct)		
□ 1731		v	100	Û	1732		×	100		Û
Add New		Re-adjust	All Select	ed: 0	Add New	Re-	adjust	All		ed: 0



Select the hyperlink to the record in the Used In column to go into the record

Mult Animals 🔹					
Fi	lter mults/animals				
	Studbook ID	Used In			
	MULT3 (2) animals	DRAFT 27			
	WILD, DRAFT 4				
	MULT2 (2) animals	<u>1336</u>			
	<u>1110, 1033</u>				
	MULT (3) animals	<u>1636</u>			
	<u>1569, 1594, 1592</u>				

Check that your MULT parents are appearing in parent boxes with the correct probabilities. Open the Parents grid and check the probabilities for the MULT are correct.

Parent						
Dam: MULT2						
	Parent	%pct				
DAM	1033	50				
DAM	1110	50				
SIRE	1174	100				

Contraception

Check that your reproduction status information translated to the correct contraception status. Navigate to a few records and view the Contraception grid.

PopLink Reproductive Value:	ZIMS Value
Not Contracepted	No value recorded in the Contraception box – a note will be migrated in to the animal details noting that this animal was once marked not contracepted
Contracepted Listed as most recent status by date	Method: Medical method – hormonal Status: Active
Contracepted/Listed as historic status	Method: Medical method – hormonal Status: Inactive
Neutered/Sterile	Method: Medical method – surgical Status: Active



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If SPARKS Sex value is:	ZIMS Value:
Neutered Male (2)	Method: Medical method – surgical
	Status: Active
Neutered Female (3)	Method: Medical method - surgical
	Status: Active
Contracepted Male (6)	Method: Medical method – hormonal
	Status: Active
Contracepted Female (7)	Method: Medical method – hormonal
	Status: Active
All other values	No value recorded in the Contraception box

If you have any questions please contact support@Species360.org

Happy Validating!

Revised 26 September 2018 * *Species360 Organizational name change added on 07/18/2016*