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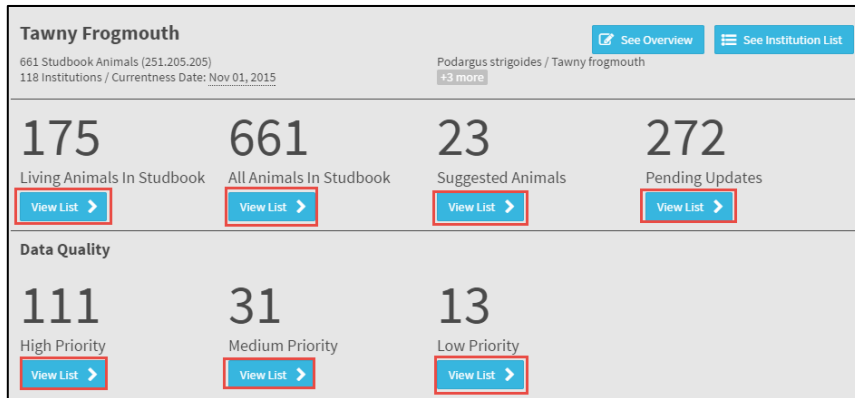
The left hand dashboard will open. Tools (and your Reports) are found at the bottom.

☐ **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 support@Species360.org and they can review the data in both your legacy software and in ZIMS.

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☐ **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.

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.

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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.
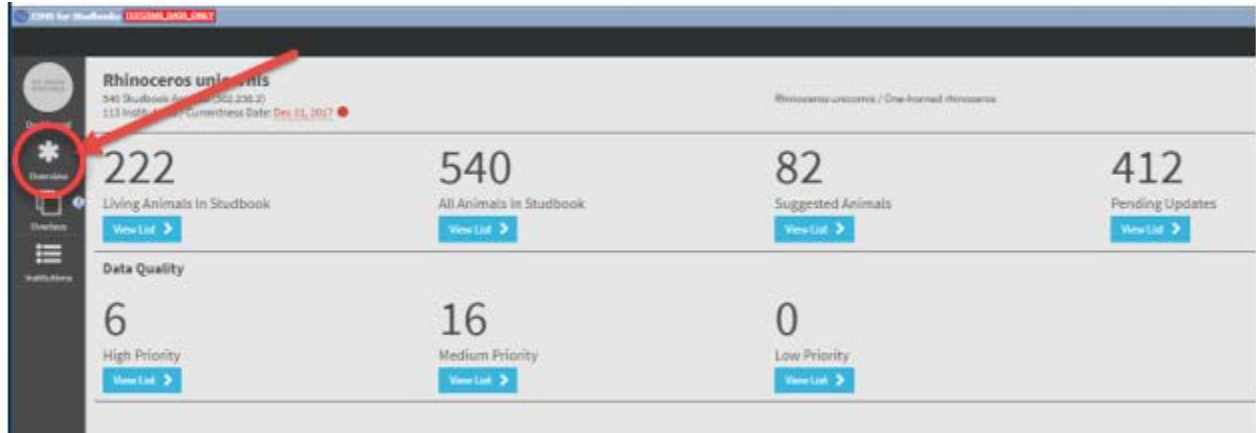
☐   Number Settings

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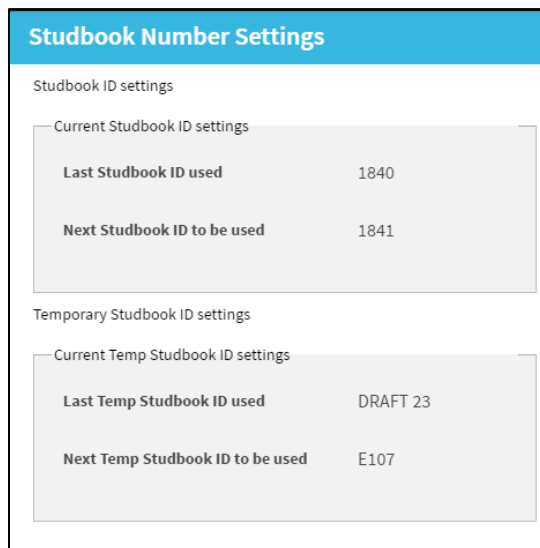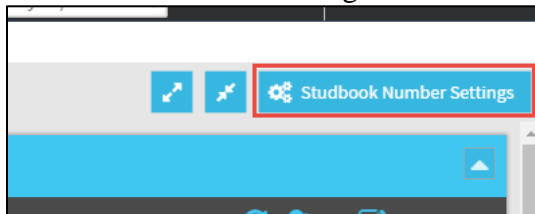
Note that the "Last Studbook ID Used" field will not populate until you enter data directly into ZIMS.

☐   Basic Information

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

Basic Information

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

⊞ 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

Taxonomy (Egg Laying)	Incubation Period (days)			Incubation Period for calculations	Max. Hatch Date Range for Clutch ...
	Minimum	Average	Maximum		
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.

Institutions

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

☐ Local Institutions

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

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

Animal Data

You then need to confirm that your Animal Data migrated correctly

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☐ **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.

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.

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.

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☐ 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.

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

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

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

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.

☐ **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