ZIMS FOR STUDBOOKS PRE-DEPLOYMENT CHECKLIST

Highest Priority – *The following items have the largest impact on your migration success. If left unaddressed, they can cause major conflicts that cannot be corrected in ZIMS. It is strongly encouraged that these items are resolved by the end of the first deployment week.*

- ☐ Check Studbook Keeper Information
  - o Ensure current studbook keeper is listed in SPARKS/PopLink and email matches ZIMS account.
  - o Work with your <u>ZIMS Local Admin</u> if your email needs to be confirmed or updated in ZIMS.
- ☐ Define Studbook Scope
  - o Make sure the studbook information in SPARKS/PopLink lists the correct regional association.
  - o If international studbook, list WAZA and overseeing region.
- ☐ Create MULT List
  - o Create list of studbook IDs included in each MULT ID.
  - o Single animal MULTs should also be corrected at this time.
  - o Notify Species360 if no MULTs in studbook.
    - ▪ See *Migrating MULTS into ZIMS for Studbooks* document for instructions
- ☐ Confirm Taxonomy
  - o Ensure the defined studbook taxonomy in your data matches the highest-level taxonomy in your studbook.
  - o Confirm you are using a current scientific names that are valid in the ZIMS Taxonomy Tree.
  - o Work with your <u>Regional Association</u> to create a list of taxonomies needed in your studbook.
    - ▪ *This may include subspecies and obsolete taxonomies.*

High Priority – *It is probable the following items will prevent you from migrating on time if not addressed.*

- ☐ Create ZIMS Login
  - o Work with your <u>ZIMS Local Admin</u> to ensure you have access.
    - ▪ *You may want additional husbandry permissions (institution search/taxonomy/view global animal data/etc.)*
- ☐ Test PopLink/SPARKS Functionality
  - o Create a full backup of your studbook and check to make sure it is complete.
    - ▪ *Support can assist you if you encounter errors.*

Medium Priority – *Not addressing the following items will not prevent you from migrating to ZIMS. However, they will likely increase the amount of time it takes you to get up and running after deployment*

- ☐ Identify Duplicate GANs
  - o If you are aware of multiple GANs for the same animal, advise the <u>institution registrars</u> to contact support.
    - ▪ Only one GAN can be linked to studbook data at this time. Only Species360 can correct this error.
- ☐ Complete Identifier Information
  - o Add missing identifiers to your animals
    - ▪ The more identifiers you add, the more likely the system will find a match to generate updates.
- ☐ Correct "Bad Data"
  - o Clean-up any troublesome records you may have in your studbook
    - ▪ Incomplete data can be finished in ZIMS. Incorrect data can cause problems.

Low Priority – *if you have time, you can do this as well but it will be equally easy to complete in ZIMS. It will not affect your time to get up and running after deployment.*

- ☐ Update Studbook
  - o You can have your studbook as up-to-date as possible, or you can wait to add new data in ZIMS.
    - ▪ Data correctness is more important for migration than completeness!