

## STUDBOOK UPDATES

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There are two types of updates from institutional data that are available for your studbook:

[Suggested Animals](#)

[Pending Updates](#)

### 1.Suggested Animals

Suggested Animals are animals recorded in ZIMS but cannot be found as records in your studbook. These are created by:

- New births or hatches
- Institution is new to ZIMS
- Records have not matched up between institution and studbook

#### Column Customization Note

Whereas in other Studbook lists you can customize columns to include additional types of data, in the Suggested List you cannot add: Studbook ID or UDF to this list view as these data are linked with husbandry data and are not currently included in customization.

Selecting to View List for Suggested Animals the complete list will appear. You can use the collapsing filter box at the top to limit the list to Local (your Regional Association) or Global. You can also filter the list by those records with a possible match in your studbook and those without.

You have four action options for Suggested Animals:

- If there is a possible match(es) you can select to **Link** the institutional record with a current studbook record using the link icon
  - The information in the institutional record will be copied into the studbook record.
  - The record will be removed from the Suggested Animals list.
  - You will start receiving Pending Updates (see Pending Updates below) for the animal.
  - You can choose to Unlink the records under the Actions button. The record will be added back to the Suggested Animal list.
- If there are no Possible Matches, or you do not agree that any of them are correct, you can choose to add the record to your studbook as a **New Animal**.
  - A Draft record will be created. Once you have completed the required fields, you can make the Draft a Full studbook record.

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- The record will be removed from the Suggested Animals list.
- You will start receiving Pending Updates (see Pending Updates below) for the animal.
- You can choose to Unlink the records under the Actions button. The record will be added back to the Suggested Animal list.
- If you decide the record should not be a part of your studbook you can **Reject** the record.
  - The record will not become a part of your studbook.
  - The record will be removed from the Suggested Animal list.
  - You will not receive Pending Updates for the animal.
  - The record will become a part of the Rejected Animal list should you later choose to add it.
- If you believe the record should be linked to a current studbook record other than the Possible Match(es) listed (if there are any) you can choose to **Manually Link** the record to the other studbook record
  - The information in the institutional record will be copied into the studbook record.
  - The record will be removed from the Suggested Animals list.
  - You will start receiving Pending Updates (see Pending Updates below) for the animal.
  - You can choose to Unlink the records under the Actions button. The record will be added back to the Suggested Animal list.

You can view any Rejected Animals by selecting View Rejected Animals at the top of the list.

You can view any Suggested Animals that have been created by merges/splits or deletions in the Husbandry modules by selecting View Husbandry Data Fix Report at the top of the list.

From within a Suggested Animal record, you can view the Husbandry record by selecting View Animal Detail in Husbandry.

## 2. Pending Updates

Pending Updates are for animal records in your studbook that have been updated in ZIMS at the institutional level but not in your studbook. You will receive Pending updates for:

- Parents
- Taxonomy
- Sex

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- Contraception
- Rearing
- Transactions

There are three situations where you will NOT receive Pending Updates from institution records:

- The institution is not a Species360 member using ZIMS
- A member institution records a non-ZIMS parent that has no corresponding institution/Local ID match already in the studbook
- The animal is managed as a Group record at the institutional level

You can filter the Pending Updates list by any number of the six topics. Within the record the number of Pending Updates is displayed at the top. In addition, the grids that have updates will display the number and the Institutional Records, in addition to the Studbook Data, will by default be open. Selecting the “?” to the left of the Institutional Data gives the following options:

- If you choose to **Accept** the data, it will become part of the Studbook Data. The record will remain on the Institution Records grid but the “?” will be changed to a checkmark indicating the data was accepted into the studbook. Should you choose to remove the data from your studbook, open the record and select Delete option and it will be removed from the Studbook Data and the Institution Record will once again display a “?”
- For Parents you have the option to **Accept All**. This allows you to accept all parents with one click and is a wonderful time saver, especially for Suggested Animals.
- For Transactions, Sex, Rearing, Taxonomy and Contraception you have the option to **Accept with Edit**. When this option is selected a pop-up of the record will open and the User can edit/save the record as desired.
- If you choose to **Reject** the data, it will not become a part of your Studbook Data but will remain on the Institution Record grid with an icon indicating to was rejected. You can choose to Accept the data should you want later.

If there are conflicts between Studbook Data and Institution Records, they will display in red in the Institution Records grid.

Additional pending records and linking ‘best practices’ information available via these Association supported documents:

- [Pending Updates and Maintaining your studbook in ZIMS](#)
- [Linking in ZIMS for Studbooks](#)
- [Column Customization Video](#)

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More available inside ZIMS (must be logged in):

- [AZA Supported Documents](#)
- [EAZA Supported Documents](#)
- [ZAA Australasia Supported Documents](#)

*Revised 9 January 2024*