HOW TO REQUEST AN ANIMAL MERGE

Contact Species360 Support

Sometimes in both the Husbandry and the Studbook modules animal records need to be merged because there are two (or more!) records for one animal.

How duplicates GANs occur

Though both ZIMS for Studbooks and ZIMS for Husbandry can come across duplicate global records, the duplicate GAN is always created initially in the husbandry module. This can happen when…

- Someone has created a new accession instead of accepting a Pending and then they also confirm the Pending. Or, they confirmed the Pending and also created a new accession.
- Someone accessioned an animal from a non-ZIMS institution that had previously been at a ZIMS institution
- Two Users accessioned the same animal at the same institution
- Someone did not accession the entity as sent (ie group was sent but receiver accessioned as individuals and vice versa)

Note, changes in Husbandry records can impact animals held in Studbooks in other ways too. See Husbandry edit impacts for details.

How to identify a merge is needed

Husbandry Module

- This most commonly happens when you receive a pending transaction to accession an animal for the first time that is already in your collection
    - You may not realize until you enter the local ID and it says it is already taken
- To identify to duplicates, your first record will be the GAN listed on the pending transaction
- Your second record will be the GAN that comes up when you look up the animal using the start bar search in ZIMS

Studbook Module

- This most commonly happens when you try to link a suggested animal to a studbook animal, and it says it is already linked to another animal
- It can also happen when you attempt to use the manually link option on the suggested animal
    - If the studbook number you are looking for is not in the dropdown list, it means it is already linked to a different GAN
- The first record's GAN will display at the top of the Suggested Animals details

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- The second record's GAN will display at the top of the studbook animal's details if you search for the studbook number (the quick search in the top right of the studbooks is fastest)
    - You can view these side-by-side by selecting compare animal from the Suggested Animal's details
- When two animal records are merged in ZIMS for Husbandry, you may be required to re-link the animal if the record that was previously linked is merged and has a new Global Accession Number (GAN).
- If you find you have two copies of an animal in your studbook (they would appear twice on your animal list), you will need to manually transfer data from one record to the other. We recommend that you:
    - Identify the record with the most complete/accurate information
    - If linked to a GAN, make sure the more complete record is the linked animal
    - Export the 'less complete' record to PDF so that you have a copy of the animal's details before you manually merge and delete the record
    - Update the more complete record with any missing information from the duplicate record. Record the duplicate records SB# in the identifiers grid as an alternative ID, make sure to note that it came from a pre-existing duplicated record
    - Notify any husbandry holders of the SB# changes, if needed
    - On the less complete record, you can now delete the animal form the studbook. Note, you can reuse the old studbook number now, but you might not choose to, if the holder records are slow to update to the new ID#.

Husbandry duplicates can be corrected by requesting a merge from support@Species360.org.

How to request a merge
The criteria for completing a merge in both the Husbandry and the Studbook modules are the same. Likewise, the results of a merge are usually the same. In most cases the original GAN or the oldest accession record is what is kept. All information will be copied over from the record that is not kept and the GAN will become an Old Accession Number in the record that is kept. Species360 will contact you once the merge is complete.

However, merges can differ in steps between merge request and completion. Some merges can be completed automatically; other merges require confirmation from the institutions with data on the animal.

Automatic Merges
For a merge to be completed automatically, the following must match in both the records:
- Taxonomy

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- Date of Birth
- Sex
- Birth Location
- And at least one of these:
    - House Name
    - Studbook Number
    - Transponder

If the above criteria are met, then the merge can be created without the confirmation of all parties involved. All you need to do is send both GANs to support@species360.org. Our Support Team will take it from there!

Merges Requiring Confirmation
However, if the above criteria cannot be matched, then confirmation for each GAN from each institution involved must be received by Species360. You will need to reach out to the other institutions yourself to acquire confirmation.

Some tips for getting confirmation quickly….
- If you do not know who the best person to contact at the institution is, you can look it up the Institution in ZIMS and see their public contacts.
    - If no public contact exists, ask your Support Representative for assistance.
- Once you have consent from all parties, you can send each institution's consent in a single email to support@species360.org along with the GANs needed for the merge
    - Make sure to include enough details so it is clear who is consenting on behalf of what institution
    - It does not have to be any more complicated than "I agree these are the same animal"
    - The easiest solution would be to forward an entire email chain to support@species360.org, as it will likely have all the information necessary.
- Alternatively, if you believe you will need more help from Species360 you can create an email that copies all parties involved and cc: support@species360.org so we can assist as needed
    - Our Support ticket system doesn't show us who is copied, so please list the copied parties in the message of your initial email so we can add them to the ticket
    - Be sure to tell all parties to reply all so their responses do not create a duplicate support ticket
- You should include the GANs to be merged in your email, but sometimes it is helpful to include other identifiers as well so it is easier for the other parties to look these animals up in their records

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o   If an institution is no longer a Species360 member, send them the specimen reports for each GAN with the merge request so they can compare the data with their non-ZIMS records.

Once Species360 receives written consent for the merge, we will complete the fix in the database.

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