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## GROUP TRANSACTIONS MADE EASY

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### TRANSACTION MODES ASSOCIATED WITH GROUPS

All of the transaction Modes and Terms associated with individuals can also be applied to groups. There are also some special transaction Modes that are associated with groups. When performing group transactions, you need to specify if it is a “Full” transaction, meaning the transaction applies to all members of the group, or a “Partial” transaction, meaning the transaction applies to only some members of the group. Although the terms “Acquisition” and “Disposition” are used, sometimes these transactions are not actually true Acquisitions (increasing the number of animals in your collection) or true Dispositions (decreasing the number of animals in your collection). The Terms “Split” and “Merge” refer to decreasing (Split) or increasing (Merge) the number of members of a group(s) without actually changing your institution’s count of animals.

#### Acquisition Modes

##### **Full Acquisitions**

**Split This Group From Another Group** – You are creating a new group with members from an existing group. This is a Full Acquisition of the new group because all the members of the group are “acquired” with this transaction. This transaction is used to fix an acquisition that was recorded incorrectly. For example, you initially recorded receiving the group From Another Institution. In reality, the group was split from another group. Use Split This Group From Another Group to record the correct transaction, delete the incorrect transaction and Save All Changes.

##### **Partial Acquisitions**

**Merge Group(s) Into This Group** - You are taking another group or groups in their entirety and adding them to the existing group. This is a Partial Acquisition into the existing group because it is adding members to a current member count. There is no limit to the number of groups you can select to merge. The corresponding disposition of the groups you are merging into this group would be Full Disposition – Merge Group(s) Into Another Group because you are taking all of the members of those groups and merging them into another group.

**Merge Individuals(s) Into This Group** – You are taking an individual and adding it to a group. This is a Partial Acquisition because you are adding members to an existing group. This transaction can also be performed from within the individual’s record.

#### Disposition Modes

##### **Full Dispositions**

**Merge Two Individuals/Groups Into a New Group** – You are taking two individuals, two groups or an individual and a group and creating a brand new group. Only two records can be selected for this

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action. This is a Full Disposition because the entire group is being merged. This transaction can also be performed from within the individual's record.

**Merge Group(s) Into Another Group** – You are taking the group in focus and merging it into an existing group. For the group in focus it is a Full transaction because the entire group is being merged. For the group it is being merged into it would be a Partial transaction of Merge Group(s) Into This Group.

### **Partial Dispositions**

**Split a Group** – You are taking some members out of the group in focus and creating a new group. You will need to assign a new Local ID to the new group created by the split action.

**Split Individual(s) From This Group** – You are taking one or more members of the group out and creating individual records for them. You will need to create new Local IDs for the individuals. If the animal(s) you are taking out were previously merged into the group you should use Split Previously Merged Animal.

**Split Previously Merged Animal** – You are taking an individual out of the group who was previously merged into the group. The individual could have been a group member that was previously split out as an individual and then merged back in, or an individual that was simply previously merged into the group. The Local ID should already exist.

**Transfer to Another Group** - You are taking some members of a group and putting them immediately into another group. This is slightly different than Split a Group where you need to assign a new Local ID. Because the members involved in this type of Partial transaction do not spend any time as a group of their own, and are instead put into another group right away, you do not need to assign a new Local ID.

**Individual Animals Becoming Groups** – Both Merge Two Individual(s)/Groups Into a New Group and Merge Animal(s) Into a Group (an existing group) are available from the individual's record.

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