

ACCEPT AND REJECT ALL TAXONOMY PENDING UPDATES FEATURE

Contact support@Species360.org

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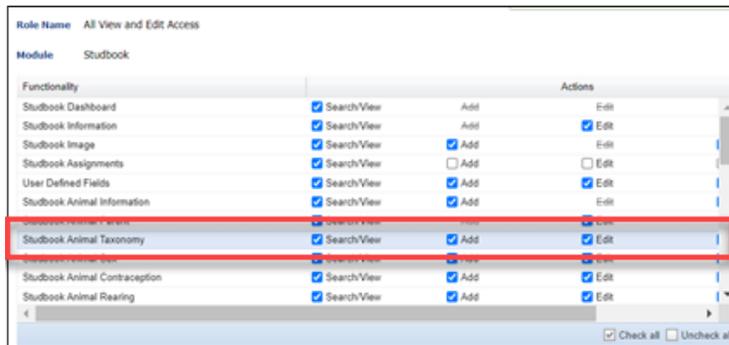
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Accept and Reject All Taxonomy Pending Updates Feature

ZIMS allows studbook keepers to accept and reject all taxonomy pending updates. This feature is available to any studbook user who has add/edit/remove actions assigned for the Studbook Animal Taxonomy functionality in the [Studbook Role Management](#).



Role Name	All View and Edit Access		
Module	Studbook		
Functionality	Actions		
Studbook Dashboard	<input checked="" type="checkbox"/> SearchView	Add	Edit
Studbook Information	<input checked="" type="checkbox"/> SearchView	Add	<input checked="" type="checkbox"/> Edit
Studbook Image	<input checked="" type="checkbox"/> SearchView	<input checked="" type="checkbox"/> Add	Edit
Studbook Assignments	<input checked="" type="checkbox"/> SearchView	<input type="checkbox"/> Add	<input type="checkbox"/> Edit
User Defined Fields	<input checked="" type="checkbox"/> SearchView	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
Studbook Animal Information	<input checked="" type="checkbox"/> SearchView	<input checked="" type="checkbox"/> Add	Edit
Studbook Animal Taxonomy	<input checked="" type="checkbox"/> SearchView	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit
Studbook Animal Breeding	<input checked="" type="checkbox"/> SearchView	Add	Edit
Studbook Animal Contraception	<input checked="" type="checkbox"/> SearchView	Add	Edit
Studbook Animal Rearing	<input checked="" type="checkbox"/> SearchView	Add	Edit

This feature is useful when:

1. **A taxonomy in ZIMS is changed/updated due to an IUCN update.**
When this change occurs in ZIMS, the Husbandry user can choose to accept the change for the animals at their institution. If the change is accepted, the studbook will alert the studbook keeper with taxonomy pending updates for those animals that need to be accepted or rejected in the studbook.
2. **A newly migrated studbook manages one or more taxon within the same studbook.**
Upon migration, the user must select one taxon for all the animals in the studbook. As a result, some studbooks have hundreds of taxonomy pending updates.

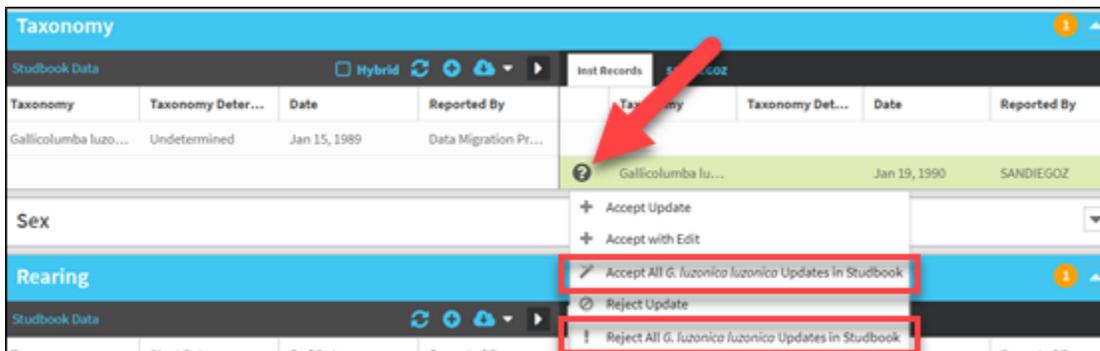
Only taxonomy that have been added by the studbook administrator can be accepted into the studbook. If the taxon is not included in the studbook, the studbook keeper will not be able to accept the record until the regional association/institution has added the taxonomy to the

studbook. Once this occurs, the option to individually and accept or reject all will be available to the studbook keeper.

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How to accept/reject all taxonomy pending updates

Users access the accept all and reject all options by clicking the “?” icon on any pending update. The Accept All and Reject All options will only display when there are two or more animals with a taxonomy pending update for the same taxonomy.



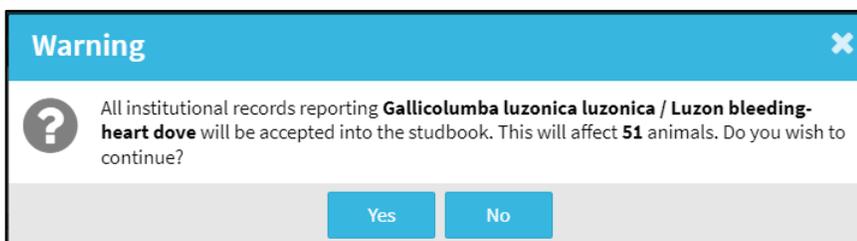
For studbooks with more than one taxon, there will be the option to accept all or reject all the pending updates for each taxon. Each taxonomy within the studbook must be accepted/rejected individually.

For example: if the studbook was managing *felis margarita*, *felis margarita harrisoni*, and *felis margarita margarita*, the user would have to choose to accept/reject all pending updates for all three taxons separately. This allows the user to choose to accept updates for one taxonomy but not the other if required.

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Accepting all taxonomy pending updates

When the user selects “Accept all (taxonomy) updates in studbook” the system will display a notification box letting the user know how many animal records will be updated as a result of the accept all.



- If the user selects yes, the system will automatically accept the pending updates for the selected taxonomy.
- If the user selects no, there will be no changes to the records.

ZIMS prohibits events from having the same date/time, so if the current studbook taxonomy and the pending taxonomy update have the same date and timestamp, the system will automatically add a timestamp to the pending update so it is accepted into the studbook on the same day. The newly accepted taxonomy will become the most recent taxonomy for that animal unless there is a taxonomy record in the studbook with a more recent date.

After accepting, all pending updates will display as accepted in the taxonomy record box. The original taxonomy remains in the studbook and the new one is accepted. The pending updates that were accepted are now removed from the count on the Pending Update list.

Taxonomy							
Studbook Data				Inst Records			
Taxonomy	Taxonomy Deter...	Date	Reported By	Taxonomy	Taxonomy Det...	Date	Reported By
Gallicolumba luzo...	Undetermined	Jan 15, 1989	Data Migration Pr...				
Gallicolumba luzo...		Jan 19, 1990	Species360 Memb...	<input checked="" type="checkbox"/>	Gallicolumba lu...	Jan 19, 1990	SANDIEGOZ

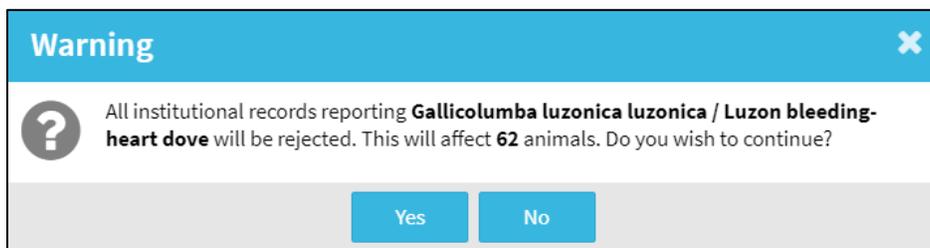
Additional accept all taxonomy pending updates notes:

- Accept all option will not display or apply to draft animals, user must add or individually accept the pending update.
- If none of the records can be accepted due to date/time conflicts, then the accept all option will not display.
- A note will be added to each animal that had a taxonomy accepted into the studbook. A keyword of “bulk accept” will be added to the note for the user to quickly filter to see the animals that had the pending taxonomy accepted.
- The accept all will display in the individual animal activity for each animal as well as the studbook activity stream on the studbook dashboard.
- If there are two or more pending taxonomy updates with the same taxonomy (the same or different timestamps) but with different taxonomy determinations, the pending updates will not be automatically accepted and must be manually accepted by the user.
- If there are two or more pending taxonomy updates and one or more has a taxonomy determination that is blank and one or more has a taxonomy determination that is defined, and all other information is the same (timestamp does not need to be the same) then the pending update with the defined determination will be automatically accepted into the studbook. The other pending updates will display as matched.
- If there are two or more pending taxonomy updates with the same taxonomy and the same determination (can be the same or different timestamp) then the system will automatically accept the first record. The other matching pending updates will display as matched.

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Rejecting all taxonomy pending updates

When the user selects “Rejects all (taxonomy) updates in studbook” the system will display a notification box letting the user know how many animal will have their pending updates dismissed.



- If the user selects yes, the system will automatically reject the pending updates for the selected taxonomy.
- If the user selects no, there will be no changes to the records.

After rejecting all, all pending updates will display as rejected in the taxonomy record box. No changes will be made to the studbook taxonomy record. The pending updates that were rejected are removed from the count on the Pending Update list.

Taxonomy							
Studbook Data				Inst Records SANDIEGOZ			
Taxonomy	Taxonom...	Date	Reported By	Taxonomy	Taxonomy Det...	Date	Reported By
Gallicolumba luzonica / Luzon bleeding-...	Undetermi...	Jan 15, 1989	Data Migra...		Gallicolumba lu...	Jan 19, 1990	SANDIEGOZ

Additional reject all taxonomy pending updates notes:

- Accept all option will not display or apply to draft animals, user must add or individually accept the pending update.
- A note will be added to each animal that had a taxonomy rejected by a reject all. A keyword of “bulk reject” will be added to the note for the user to quickly filter to see the animals that had the pending taxonomy rejected.
- The reject all will display in the individual animal activity for each animal as well as the studbook activity stream on the studbook dashboard.

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How to undo an accept/reject all

Each accept/reject all will display in the [Data Entry Monitoring tool](#). Users can choose to undo the accept/reject all for each time the action was taken by (1) selecting the entry and (2) clicking ‘Undo Selected’.



When the user rolls back the accept/reject all the taxonomy pending updates will return and display back on the Pending Update screen and within each animal’s taxonomy transaction as a pending update.

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How to find animals that were accepted/rejected in bulk

A note is added to each animal that had a taxonomy accepted/rejected by using the accept/reject all option. A keyword of “Accept All” or “Reject All” is added to the note for users to quickly filter to see which animals had the pending taxonomy accepted or rejected.

To find the animals:

1. Click on your preferred animal list (All or Living list).
2. Click the drop-down arrow to open the filters.
3. Choose the “Note” tab.
4. Enter “Accept All” or “Reject All” in the Keywords box.
5. Click Search – This will produce a list of all the animals with that keyword. You can also choose complimentary filters to have a more specific search, e.g. adding the Institution filter of “EAZA” to limit your results to animals within that Association.

The screenshot shows the ZIPS for S1 interface for the species *Przewalskium albirostris*. The main table lists animals with columns for Studbook ID, Current Location, Sex Type, Current Status, Birth Date, GAN, Current Location, Sire, Dam, Age, Taxonomy, and Last Modified. A note for animal E0037 is expanded, showing a 'Keywords' dropdown set to 'Reject all' and a 'Note Sub Type' of 'Reason for Taxonomic Change'. A red dashed arrow points from the 'Reject all' keyword to the 'Reject All' option in the note's keywords dropdown.

Studbook ID	Current Location	Sex Type	Current Status	Birth Date	GAN	Current Loca...	Sire	Dam	Age ↓	Taxonomy	Last Modified
E0037	LODZ	Female	Alive	Jun 22, 2000	7678900	8700	E0020	E0024	21Y4M,11D	Przewalskiu...	Sep 11, 2020 ...
E0070	RIGA	Female	Alive	Oct 18, 2003	MIG12-29212744	O30526	E0005	E0004	18Y,0M,15D	Przewalskiu...	Aug 27, 2020 ...
E0099	KINGUSSIE	Female	Alive	Jun 13, 2006	23855177	5562	E0002	E0025	15Y4M,20D	Przewalskiu...	Aug 28, 2020 ...
E0146	RIGA	Female	Alive	Jul 02, 2009	MIG12-29212745	M09297	E0005	E0045	12Y4M,0D	Przewalskiu...	Aug 27, 2020 ...

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What happens if the taxonomy I want to accept/reject is not listed as a taxonomy in the studbook?

Only taxonomy that has been added by the studbook administrator can be accepted into the studbook. If the taxon is not included in the studbook, the studbook keeper will not be able to accept the record until the regional association or institution has added the taxonomy to the studbook. Once it has been added the option to accept or reject pending taxonomic changes, either individually or accept/reject all, will be available to the studbook keeper.

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Revised 5 November 2021