

Studbook Roles

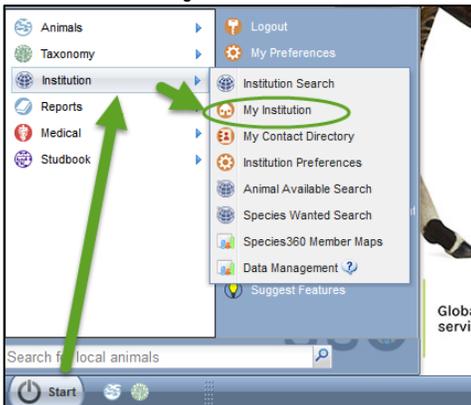
The Studbook Admin is responsible for assigning and updating Studbook Roles. For regional studbooks this would be the Regional Association sponsoring the studbook. For institutional studbooks it is the staff person assigned as the admin. Studbook users can be permitted to assign access if allowed by regional/institutional admin ([click here for details](#)).

See the [list](#) of all the functionalities provided via roles at the end of this document.

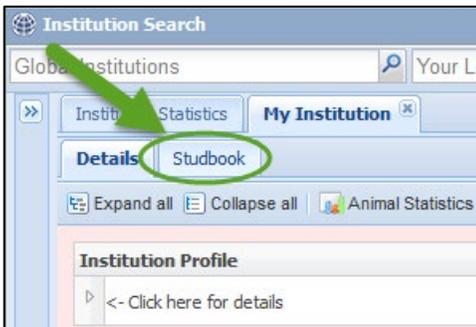
Contact Species360 Support if you need any assistance with role management Support@species360.org.

When new features are released into the Studbook module in ZIMS, the permissions to access these features are not always immediately granted to the assigned studbook managers. The feature in ZIMS that controls access to the Studbook features is called the ZIMS Role.

- 1) Log into ZIMS as the Studbook Admin.
- 2) Access the 'My Institution' screen under the Institution Search module.



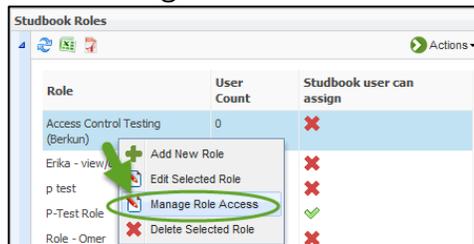
- 3) From the 'Studbook' tab, scroll down to the Studbook Roles grid and review the assigned roles.



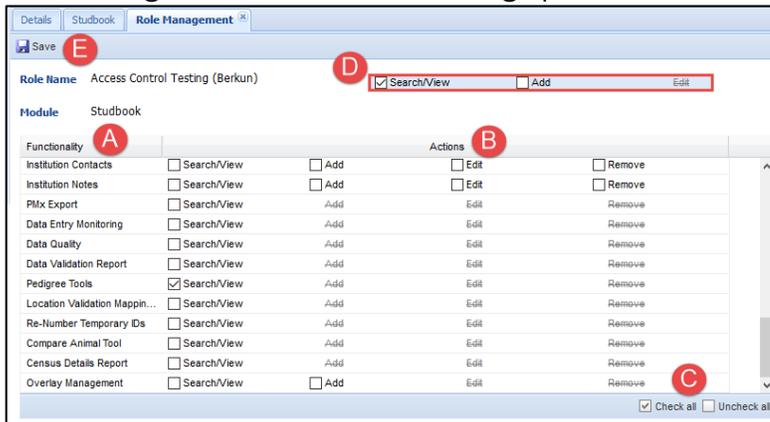
- 4) You will notice the grid shows:
 - A. Name of the role
 - B. The number of assigned managers (Users) for each role

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- C. If the role permits Studbook managers the rights to assign more users to use this role. If you want to add a new role select Add Role. If you want to review or edit an existing role, highlight the role you wish to update and select Action > Manage Role Access or right click on the role and choose 'Manage Role Access'.



5) Role Management allows the following options:



- A. List of Functionalities in ZIMS for Studbooks controlled by this role editor
- B. Each functionality is provided some of the Action options:
 - i. Search/View (allows you to see the feature, read-only access)
 - ii. Add (allows you to add records of this type)
 - iii. Edit (allows you to modify existing records of this types)
 - iv. Remove (allows you to delete records of this type)
- C. For ease of managing all the options at once, you are allowed to 'check all' or 'uncheck all' – **be careful as you may be granting more permissions than you intend if you choose to include all.**
- D. Note, the Actions options have three modes:
 - i. Checked (this feature is included in the role permissions you are providing)
 - ii. Unchecked (this feature is not included in your role permissions)
 - iii. Unavailable (strikeout this feature does not permit this type of action)
- E. Don't forget to Save to ensure your modifications to this role are granted to your users.

As soon as you save changes to the role the permissions are immediately granted to all assigned users of this role. You may wish to think about the different groups of studbook managers that might need some features first before modifying the assigned roles. Work to create and maintain

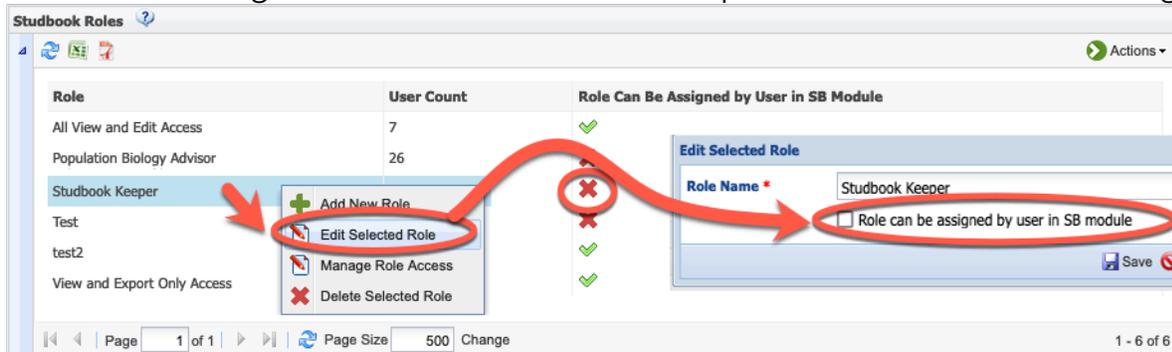
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the least amount of roles as possible to ensure the smoothest processes of assigning and updating permissions in ZIMS.

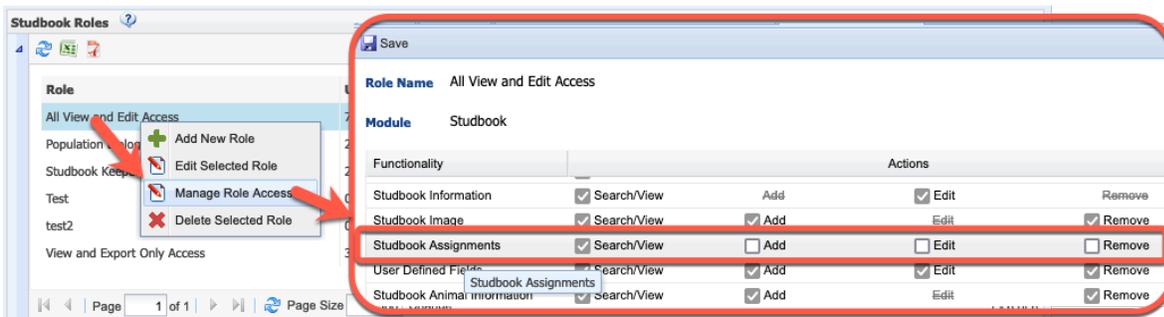
Studbook User Assigning Access to Data

In addition to the level of access to studbook data granted by the role created, the Studbook administrator can permit roles to be assigned to other users by an approved studbook keeper. To allow this, first a role must be categorized as 'assignable' by studbook keeper.

Right click on the role and Edit Role, then enable the 'Role can be assigned' option. This displays in the column with a green checkmark when that role is permitted for studbook user assignment.



Next, create a role that includes the ability to assign role access, this should be separate from the role allowed to be assigned above. This role will be granted to the specific studbook users that are now permitted to assign roles to additional users. They will only be able to assign the roles that the admin has flagged in the step above for assignment.

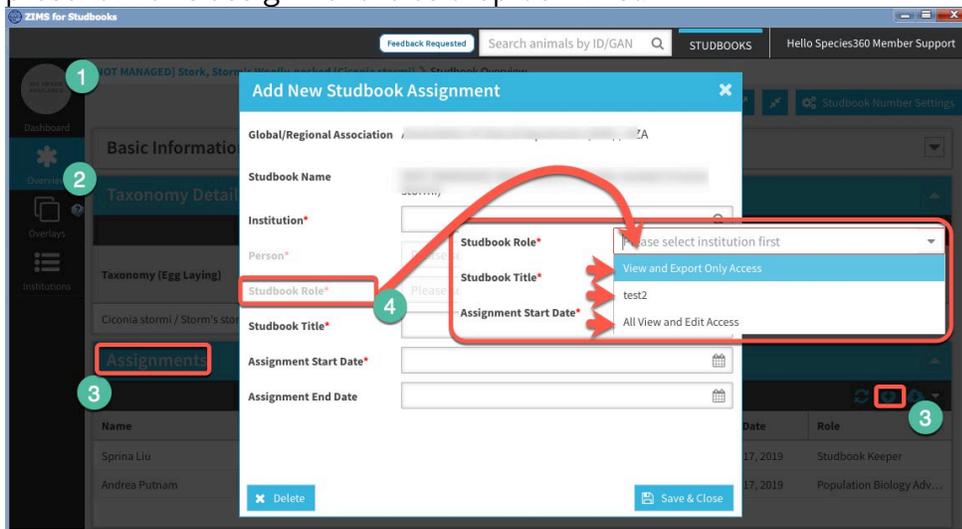


In the example above, the studbook user that has this role is allowing them see (search/view) the assignments made to their studbook. By including the 'add' option this will allow them to grant access to other users. Without the 'edit' or 'remove' options they cannot edit or remove existing assignments.

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Edits to studbook assignments are made by a studbook users inside the studbook module, under:

- 1) Dashboard
- 2) Overview screen
- 3) Assignments grid
- 4) Reminder, only roles defined by studbook admin as ‘assignable’ by studbook users will be present in this assignment roles drop-down list.



Notes:

- The studbook user can only assign access to current ZIMS users. If the person does not have a ZIMS account, they cannot be granted access by a studbook user.
- Additionally, access can be granted for start/stop date. After the stop date, the access will be revoked automatically.
- See the [list](#) of all the functionalities provided via roles at the end of this document.
- [Short guide for Studbook Users on Granting Rights in their studbook.](#)

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List of Functionality

The access provided via s role will take effect when you assign the role to a person.

Institutional Access

The following features are provided by the Institutional administrator in the Husbandry module of ZIMS, the Studbook Keeper should be assigned the Role of Population Manager (Species360). This Role gives access Search/View access to:

- **Animal**
 - Acq./Disp. Transaction
 - Animal/Basic Detail
 - Contraception
 - Holder History
 - Identifier
 - Life Stage
 - Measurement
 - Ownership History
 - Parent Info
 - Rearing
- **Global Reports & Tools**
 - Age Distribution
 - Global Taxon
 - Pedigree Explorer
 - Species Event History
 - Species Holding
 - Specimen Report
 - TAG Export
 - Taxonomic Inconsistency
- **Institution**
 - Animal Available
 - Association Members
 - Institution Basic Detail
- **Studbook**
 - Studbook Keeper List & Charts
- **Taxonomy**
 - Body Component
 - Characteristic
 - Citation Info
 - Genetic Trait
 - Hazard Info
 - Reference Info
 - Reproduction Info

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- Sex Class & Life Stage
- Synonym
- Taxonomy/Basic Info
- Valid Measurement

Studbook Access

The following is a list of functionalities currently available in ZIMS for Studbooks and an explanation of what access levels are available:

- **Studbook Dashboard:**
 - Search/View:
 - Checked: User can view Studbook Dashboard.
 - Unchecked: User cannot view the Studbook Dashboard.
 - User cannot access the dashboard from the studbook list
 - If the user has access to the animal lists, then selecting the count within the studbook list will take them to the animal lists.
- **Studbook Information:**
 - Search/View:
 - Checked: User can view the Studbook Overview screen. Read only access.
 - This includes the Basic Information and Taxonomy Details.
 - Unchecked: User cannot view the Studbook Overview screen.
 - Edit:
 - Checked: User can edit the data within the Studbook Overview screen.
 - This includes the Basic Information and Taxonomy Details.
 - Unchecked: User cannot edit the data within the Studbook Overview screen.
 - Note: search/view access must be assigned to have edit access.
- **Studbook Image:**
 - Search/View:
 - Checked: User can view studbook avatar image.
 - Unchecked: User cannot view studbook avatar image.
 - Add:
 - Checked: User can add an avatar image to the studbook.
 - Unchecked: User cannot add an avatar image to the studbook.
 - Delete:
 - Checked: User can delete previously added avatar studbook image.
 - Unchecked: User cannot delete previously added avatar studbook image.
- **Assign Person to Studbook:**
 - Search/View:

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- Checked: User can view Assignments box on Studbook Overview screen.
 - Unchecked: User cannot view Assignments box on Studbook Overview screen.
 - Add:
 - Checked: User can assign people to studbook and give them roles that regional association has allowed them to assign.
 - Unchecked: User cannot assign people to studbook.
 - Edit:
 - Checked: User can edit a studbook assignment record.
 - Unchecked: User cannot edit a studbook assignment record.
 - Remove:
 - Checked: User can delete a studbook assignment record.
 - Unchecked: User cannot delete a studbook assignment record.
 - **User Defined Fields:**
 - Search/View:
 - Checked: User can view User Defined Field box on Studbook Overview screen and open the UDFs to view the detailed records.
 - Unchecked: User cannot view User Defined Field box on Studbook Overview screen
 - Note: User cannot view UDF if they do not have access to the Studbook Overview screen (above).
 - Add:
 - Checked: User can add User Defined Fields to Studbook on Studbook Overview screen.
 - Unchecked: User cannot add User Defined Fields to Studbook on Studbook Overview screen.
 - Note: Search/View must be assigned to have add access.
 - Edit:
 - Checked: User can edit User Defined Fields on Studbook Overview screen.
 - Unchecked: User cannot edit User Defined Fields on Studbook Overview screen.
 - Note: Search/View must be assigned to have edit access.
 - Remove:
 - Checked: User can delete User Defined Fields on Studbook Overview screen.
 - Unchecked: User cannot delete User Defined Fields on Studbook Overview screen.
 - Note: There is currently no delete functionality for UDFs at this time. Selecting this option does not change role control. When this functionality is

implemented this will give delete access.

- **Studbook Animal Information**

- Search/View:
 - Checked: User can view lists of animals within the studbook and view the basic info screen within an animal detail (permanent or draft animals).
 - Unchecked: User cannot view lists of animals or the basic info within the animal details screen (permanent or draft animals).
- Add:
 - Checked: User can add draft animals to the studbook. To promote the draft animal to a permanent animal, the user needs role access for all of the required animal detail boxes.
 - Unchecked: User cannot add draft animal to the studbook.
- Remove:
 - Checked: User can delete permanent and draft animals from the studbook.
 - Unchecked: User cannot delete permanent and draft animals from the studbook.

- **Studbook Animal Parent:**

- Search/View:
 - Checked: User can view parent information box on the studbook animal detail screen.
 - Unchecked: User cannot view parent information box on the studbook animal detail screen.
- Edit:
 - Checked: User can edit parent information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit parent information on the studbook animal within the animal detail screen.
- Note: There is no add/remove option for parents since the records are not tracked through time and at least one sire/dam is required at all times.

- **Studbook Animal Taxonomy**

- Search/View:
 - Checked: User can view the taxonomy information box in the studbook animal detail screen.
 - Unchecked: User cannot view the taxonomy information box in the studbook animal detail screen.
- Add:

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- Checked: User can add taxonomy information to animals within the animal detail screen.
 - Unchecked: User cannot add taxonomy information to the animals within the animal detail screen.
 - Edit:
 - Checked: User can edit taxonomy information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit taxonomy information on the studbook animal within the animal detail screen.
 - Remove:
 - Checked: User can delete taxonomy information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot taxonomy sex information from the studbook animal within the animal detail screen.
- **Studbook Animal Sex**
 - Search/View:
 - Checked: User can view the sex information box in the studbook animal detail screen.
 - Unchecked: User cannot view the sex information box in the studbook animal detail screen.
 - Add:
 - Checked: User can add sex information to animals within the animal detail screen.
 - Unchecked: User cannot add sex information to the animals within the animal detail screen.
 - Edit:
 - Checked: User can edit sex information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit sex information on the studbook animal within the animal detail screen.
 - Remove:
 - Checked: User can delete sex information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot delete sex information from the studbook animal within the animal detail screen.

- **Studbook Animal Contraception:**

- Search/View:
 - Checked: User can view contraception information box on the studbook

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- Checked: User can view transaction information box on the studbook animal detail screen.
 - Unchecked: User cannot view transaction information box on the studbook animal detail screen.
 - Add:
 - Checked: User can add transaction information to studbook animal detail.
 - Unchecked: User cannot add transaction information to studbook animal detail.
 - Edit:
 - Checked: User can edit transaction information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit transaction information on the studbook animal within the animal detail screen.
 - Remove:
 - Checked: User can delete transaction information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot delete transaction information from the studbook animal within the animal detail screen.
- **Studbook Animal Identifiers:**
 - Search/View:
 - Checked: User can view identifier information box on the studbook animal detail screen.
 - Unchecked: User cannot view identifier information box on the studbook animal detail screen.
 - Add:
 - Checked: User can add identifier information to studbook animal detail.
 - Unchecked: User cannot add identifier information to studbook animal detail.
 - Edit:
 - Checked: User can edit identifier information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit identifier information on the studbook animal within the animal detail screen.
 - Remove:
 - Checked: User can delete identifier information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot delete identifier information from the studbook animal within the animal detail screen.

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- **Studbook Animal User Defined Fields:**

- Search/View:
 - Checked: User can view user defined field information box on the studbook animal detail screen.
 - Unchecked: User cannot view user defined field information box on the studbook animal detail screen.
- Add:
 - Checked: User can add user defined field information to studbook animal detail.
 - Unchecked: User cannot add user defined field information to studbook animal detail.
- Edit:
 - Checked: User can edit user defined field information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit user defined field information on the studbook animal within the animal detail screen.
- Remove:
 - Checked: User can delete user defined field information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot delete user defined field information from the studbook animal within the animal detail screen.

- **Studbook Animal Notes:**

- Search/View:
 - Checked: User can view animal notes information box on the studbook animal detail screen.
 - Unchecked: User cannot view animal notes information box on the studbook animal detail screen.
- Add:
 - Checked: User can add animal notes information to studbook animal detail.
 - Unchecked: User cannot add animal notes information to studbook animal detail.
- Edit:
 - Checked: User can edit animal notes information on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit animal notes information on the studbook animal within the animal detail screen.
- Remove:

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- Checked: User can delete animal notes information from the studbook animal within the animal detail screen.
 - Unchecked: User cannot delete animal notes information from the studbook animal within the animal detail screen.
- **Studbook Animal Labels:**
 - Search/View:
 - Checked: User can view animal labels box on the studbook animal detail screen.
 - Unchecked: User cannot view animal labels information box on the studbook animal detail screen.
 - Add:
 - Not active for Labels.
 - Edit:
 - Checked: User can add new labels to studbook and can apply/remove labels to an animal on the studbook animal within the animal detail screen.
 - Unchecked: User cannot edit the applied labels on the studbook animal within the animal detail screen.
 - Remove:
 - Not currently active for Labels (cannot delete existing labels).
- **Studbook Animal Institution Comparison:**
 - Search/View:
 - Checked: User can view the institutional comparison panel on the studbook Animal Detail screen for each of the individual record boxes (transactions, rearing, etc.).
 - User can also see the Pending Updates List.
 - Unchecked: User cannot view the institutional comparison panel on the studbook Animal Detail screen for each of the individual record boxes (transactions, rearing, etc.).
 - User cannot see the Pending Updates List.
 - Add:
 - Checked: User can accept institution records from the comparison panel on the studbook Animal Detail screen for each of the individual record type boxes (transactions, rearing, etc.).
 - Unchecked: User cannot accept institution records from the comparison panel on the studbook Animal Detail screen for each of the individual record type boxes (transactions, rearing, etc.).
 - Remove:
 - Checked: User can reject institution records from the comparison panel on

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the studbook Animal Detail screen for each of the individual record type boxes (transactions, rearing, etc.).

- Unchecked: User cannot reject institution records from the comparison panel on the studbook Animal Detail screen for each of the individual record type boxes (transactions, rearing, etc.).

- **Suggested Animals:**

- Search/View:

- Checked: User can view the Suggested Animal List and the Suggested Animal Detail screen.
 - Unchecked: User cannot view Suggested Animal List or the Suggested Animal Detail Screen
 - Note: if the user does not have view access for suggested animals, they will not see the Suggested Animal count on the studbook list, dashboard, or animal lists.

- Add:

- Checked: User can import Suggested Animal as a new draft animal (New animal button is shown).
 - Unchecked: User cannot import Suggested Animal as a new draft animal (New animal button is shown).

- Edit:

- Checked: User can link Suggested Animal with an animal in the studbook.
 - Unchecked: User cannot link Suggested Animal with an animal in the studbook.

- Remove:

- Checked: User can reject Suggested Animal from the Suggested List (Reject button is shown).
 - Unchecked: User cannot reject Suggested Animal from Suggested List (Reject button is not shown).

- **Global Studbook Search Tool:**

- Search/View:

- Checked: User can view the Global Studbook Search Tool under Start menu > Studbooks.
 - Unchecked: User cannot view the Global Studbook Search Tool under Start menu > Studbooks.

- **Studbooks Newsfeed:**

- Search/View:

- Checked: User can view the studbook newsfeed.

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- Unchecked: User cannot view the studbook newsfeed.
- **Census Report:**
 - Search/View:
 - Checked: User can run a Census Report, generate graphs, and view the global studbook graphs.
 - Unchecked: User cannot run a Census Report, generate graphs, and view the global studbook graphs.
- **Institution List:**
 - Search/View:
 - Checked: User can view institution list in the studbook.
 - Unchecked: User cannot view the institution list in the studbook.
 - Note: If use does not have access to view the institution list, they cannot view the additional institution functionalities listed below.
- **Institution Profile:**
 - Search/View:
 - Checked: User can view institution details and the institution profile for local and global institutions.
 - Unchecked: User cannot view institution details and the institution profile for local and global institutions.
 - Add:
 - Checked: User can add new local institutions.
 - Unchecked: User cannot add new local institutions.
 - Edit:
 - Checked: User can edit institution profile for local institution.
 - Unchecked: User cannot edit institution profile for local institution.
 - Remove:
 - Checked: User can mark local institution as obsolete.
 - Unchecked: User cannot mark local institution as obsolete.
 - Note: Functionality to make an institution as obsolete is not currently available. When this functionality is completed, this access will grant these rights.
- **Institution Synonym:**
 - Search/View:
 - Checked: User can view synonyms box on the institution detail screen for local or global institutions.
 - Unchecked: User cannot view synonyms box on the institution detail screen

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for local or global institutions.

- Add:
 - Checked: User can add new synonyms for local institutions.
 - Unchecked: User cannot add new synonyms for local institutions.
 - Note: Functionality to add a local institution synonym is not currently available. When this functionality is completed, this access will grant these rights.
- Edit:
 - Checked: User can edit synonyms for local institutions.
 - Unchecked: User cannot edit synonyms for local institutions.
 - Note: Functionality to edit a local institution synonym is not currently available. When this functionality is completed, this access will grant these rights.
 -
- Remove:
 - Checked: User can delete synonyms for local institutions.
 - Unchecked: User cannot delete synonyms for local institutions.
 - Note: Functionality to delete a local institution synonym is not currently available. When this functionality is completed, this access will grant these rights.
- **Institution Contacts:**
 - Search/View:
 - Checked: User can view contacts box on institution detail for local or global institutions.
 - Unchecked: User cannot view contacts box on institution detail for local or global institutions.
 - Add:
 - Checked: User can add new contacts on institution detail for local or global institutions.
 - Unchecked: User cannot add new contacts on institution detail for local or global institutions.
 - Edit:
 - Checked: User can edit contacts on institution detail for local or global institutions.
 - Unchecked: User cannot edit contacts on institution detail for local or global institutions.
 - Remove:
 - Checked: User can delete contacts on institution detail for local or global

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institutions.

Unchecked: User cannot delete contacts on institution detail for local or global institutions.

- **Institution Notes:**

- Search/View

- Checked: User can view notes box on institution detail for local or global institutions.
- Unchecked: User cannot view notes box on institution detail for local or global institutions.

- Add

- Checked: User can add notes on institution detail for local or global institutions.
- Unchecked: User cannot add notes on institution detail for local or global institutions.

- Edit

- Checked: User can edit notes on institution detail for local or global institutions.
- Unchecked: User cannot edit notes on institution detail for local or global institutions.

- Remove

- Checked: User can delete notes on institution detail for local or global institutions.
- Unchecked: User cannot delete notes on institution detail for local or global institutions.

- **PMx Export:**

- Search/View:

- Checked: User can run the PMx export.
- Unchecked: User cannot run the PMx export.

- **Data Entry Monitoring**

- Search/View:

- Checked: User has full access to data entry monitoring tools. User can view tool and roll back additions/deletions/edits within the studbook.
- Unchecked: User cannot view the data entry monitoring tool.
- Note: User can have access to the data entry monitoring tool for some studbooks and not others. They will only see the records for the studbooks they have access assigned.

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- **Data Quality:**
 - Search/View:
 - Checked: User can view the Data Quality (active and dismissed) list and see the data quality counts on the dashboard.
 - Unchecked: User cannot view the Data Quality (active and dismissed) list or the data quality counts on the dashboard.
 - Edit:
 - Checked: User can dismiss data quality errors.
 - Unchecked: User cannot dismiss data quality errors.

- **Data Validation Report:**
 - Search/View:
 - Checked: User can view and export the Data Migration Validation Report.
 - Unchecked: User cannot view and export the Data Migration Validation Report.

- **Pedigree Tools:**
 - Search/View:
 - Checked: User can view all Pedigree Tools (Descendant list, antecedent list, sibling list, unknown pedigree report). User can access these tools from the tool bar and the Animal Detail screen (if given access to Animal Details).
 - Unchecked: User cannot view Pedigree Tools (Descendant list, antecedent list, sibling list, unknown pedigree report). User cannot access these tools from the tool bar or the Animal Detail screen (if given access to Animal Details).

- **Location Validation Mapping Report**
 - Search/View:
 - Checked: User can view the Location Validation Mapping Report.
 - Unchecked: User cannot view the Location Validation Mapping Report.

- **Managed Group Role Control**
 - Search/View
 - Checked then user can see the Social Group management screen and the social group grid in the animal details, filters, and, animal lists
 - Unchecked the user cannot see the Social Group management screen and the Social Group in the animal detail, filters, and animal lists
 - Add
 - Checked then user can add social groups in management screen and add social groups in the animal details

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- Unchecked then user cannot add social groups in management screen and add social groups in the animal details
 - Edit
 - Checked then user can edit social groups in management screen
 - Unchecked then user cannot edit social groups in the management screen
 - Remove
 - Checked then user can delete social groups in management screen and delete social groups in the animal details
 - Unchecked then user cannot delete social groups in management screen and delete social groups in the animal details
- **Re-Number Temporary IDs:**
 - Search/View:
 - Checked: User can view the re-number tool and change temporary IDs to permanent IDs.
 - Unchecked: User cannot view the re-number tool and change temporary IDs to permanent IDs.
- **Compare Animal Tool:**
 - Search/View:
 - Checked: User can view the Compare Animal tool and compare animals.
 - Unchecked: User cannot view the Compare Animal tool.
- **Overlay Management:**
 - Search/View:
 - Checked: User can view overlay management screen, apply overlays, and view overlay data.
 - Unchecked: User cannot view overlay management screen. Overlay option is not available to the user.
 - Add:
 - Checked: User can add/edit/delete overlays. User can add/edit animals within the overlay and delete records created within the overlay. With the add role, the user receives full edit access to the overlay functionality.
 - Unchecked: User cannot make any changes within the overlay functionality.
- **Institutional Holdings Report:**
 - Search/View:
 - Checked: User can view and export Institutional Holdings Report .
 - Unchecked: User cannot view Institutional Holdings Report.

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- **Institutional Holdings Report:**
 - Search/View:
 - Checked: User can view and export Institutional Holdings Report .
 - Unchecked: User cannot view Institutional Holdings Report.
 - **Data Export:**
 - Search/View:
 - Checked: User can run an XML full studbook data export.
 - Unchecked: User cannot run an XML full studbook data export.
 - **Age Structure:**
 - Search/View:
 - Checked: User can view an age pyramid of their current living studbook population.
 - Unchecked: User cannot view an age pyramid of their current living studbook population.

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