UPDATED DATA ENTRY STANDARD for GROUP ACCESSIONS

Topics originally discussed on pp. 38-40, 92, 119-122 of *Standards for Data Entry and Maintenance of North American Zoo and Aquarium Animal Records Databases*, 1998

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What is a group accession?

The term group (sometimes referred to as a "colony") has many definitions when used in zoos and aquariums, and is usually defined by its application, such as a management group or a social group. Only the group accession is discussed here. From the *Standards* (p. 39): "When accessioning a group, a single record file is created for several individuals of a species."

While other types of groups can be composed of multiple species (the inhabitants of a reef exhibit) or individually accessioned specimens (a flock of banded finches), note that

- a group accession consists of only one species, and
- the individuals within the group accession cannot be differentiated from each other.

Thus, **no individually accessioned specimens are included in a group accession.**

Group accession information began being submitted to ISIS when ARKS4 was released and is stored in the central database. The "Species Holdings" area of the ISIS website shows institutions which hold species as group accessions, and gives group counts. (This limited group information is found as a separate item immediately following the individual listing for a species or subspecies.) Details of group accessions are available only from the Specimen Reference DVDs.

Some things to keep in mind about group accessions….

- Group accession is a means of recording information that doesn't fit the parameters of individual accession.

Though there is still no software that can analyze group information adequately, the capture of information in a group accession is preferable to not recording anything and preferable to using unsubstantiated information to create an individual record. It is hoped that future software will either analyze group information in its existing format or will convert it to a useable form. In either case, the first step is to record the information so that it is available in the future.

- Group accession allows the recording of a great deal of information about a group, but most of it must be recorded as notes.

Since there are no dedicated fields in which to record information such as age, gender, etc., thorough and complete notes are essential. If individual parentage has not been determined, it is especially important to record the source of the group's founders by location and number of individuals from each location; this becomes the primary means of establishing the genetic makeup of the group.

- Group accession functions as an enhanced inventory module.

Unlike ARKS3, ARKS4 tracks only raw numbers in transactions and total counts. (Gender information is now recorded in note form). But in addition to a census, a group accession allows the retention of valuable information in the form of notes, measurements and enclosures.

- Measurements, i.e. weights and lengths, can -- and should -- be recorded where possible.

Though measurements cannot be linked to any particular individual, they are still valuable because they add to the body of knowledge about a species. Measurements can be applied to specific or estimated numbers of specimens (the weight of "approximately 50" millipedes, for instance), or applied to individuals within the group (the weights obtained at one time of 5 different mice). Again, notes must convey explanation about these weights and should be added in the <Notes> section of that measurement data entry line.

When should a group accession be used?

Group accession is used to record

- individuals of the same species or subspecies which cannot be differentiated from one another either physically (have no scars or color pattern differences), artificially (are not tagged or transpondered), or spatially (are not held in separate enclosures).
    - Your institution receives 50 Puerto Rican crested toad tadpoles to rear. Unless each tadpole is raised in a separate numbered aquarium, there is no way to tell one tadpole from another.
    - Note that this practice <u>replaces</u> the *Standards*, p. 92, Dispositions of Individuals From Groups of Individuals, and example specimen #s 35 and 36, since any specimens that can be identified should now be individually accessioned – there should no longer be any group accession composed of identifiable individuals.
- a chunk of "live rock" (coral). Note that this <u>replaces</u> the *Standards,* page 38, which excludes live rock from accessioning. Each piece of coral is considered to be a group accession since it is composed of uncountable numbers of individuals; though the group count is 1 (i.e. one piece), a note of the dimensions or mass of the piece gives an estimate of the colony size. Whenever a section is broken off to start a new colony, that piece becomes a new group accession.
- a self-sustaining colony of small rodents or insects.
    - Your institution has a large number of Cairo spiny mice. No daily count is made, though numbers associated with daily events, such as births and deaths, increase and decrease the count. A census should be taken periodically, recording new counts by sex and age, and additional counts should be made whenever possible, e.g. if the colony is moved.
- young born to several females of the same species or subspecies and raised together without means of identifying which offspring were born to which mothers.
    - A flock of 3.6 peafowl raise 25 chicks this year. Identity of the hens incubating each nest, hatch dates, and number of chicks hatched from each nest can be determined. However, unless the chicks are caught and banded at hatching, once the mothers and their chicks join the main flock it is no longer possible to tell which chicks belong to which females. All chicks in the flock have the same possible parents: all the peacocks and those peahens which incubated the nests.
- historic records for a species or subspecies for which there is insufficient information to attribute events to specific individuals.
    - Some of your historic records are found as simple lists of events. Though there are dates for all transactions, and maybe even specified vendors or recipients for those events, you cannot create individual records for any of these specimens without

additional information: there is nothing connecting any specific individual to both acquisition and disposition information. If additional information is uncovered which makes that connection, then that individual can be removed from the group accession and given an individual record.

*** **Important notes about using group accession for historic records.** ***

- The decision of whether to use individual or group accession should be made thoughtfully and carefully. Group accession should be used only if there is insufficient information to create an <u>accurate</u> individual record. The use of group accession is preferable to the inclusion of "best guess" information (i.e. fiction) to fill the fields necessary to complete an individual record.
- If additional information is found which allows creation of an individual record for one of the group members, the procedure for removal from the group is different than that outlined below for current records. This situation is treated differently because the individual was not truly part of a group accession – the information necessary for a complete individual record was merely not known and the group accession is used 'temporarily' until the required information is found or learned. **The information in the group accession relating to this individual must be <u>deleted completely</u> from the group, as if it were never part of the group.** This
    - o will allow the individual record to begin with the initial acquisition and will include the specimen's entire history in one record.
    - o prevents inflation of inventory by eliminating the possible duplication of the same information in both the group and individual records.

<u>CREATING A NEW GROUP</u>

<u>NOTE:</u> if creating a group accession from individual accessions or from another group accession currently at your facility, see below, "Working with specimens and groups already at your facility".

Data entry procedures

- At the main data entry menu, select the ADD button.
- From the pop-up menu, select "Adding a group".
- Supply the requested information.
    - o <Date> is the date on which the group accession begins. If appropriate, use the <Estimate> field.
    - o Transaction <Type>: Select the appropriate transaction from the pop-up menu.
        - ▪ If this is a 'birth, loan in' or 'birth, loan out' select 'birth'; this is only temporary and will be corrected in a later step.
        - ▪ Time-saver: typing the first letter of a transaction type selects that transaction.
    - o <Count>: Enter the number of specimens that make up this group accession.
        - ▪ If the count cannot be determined, enter the most accurate estimate and add a <Note> on this menu (or as a Group History note (code TH) on the [NOTES] tab) explaining how this count was determined. For example, Disney's Animal Kingdom uses the convention that ½ pound of honeybees contains approximately 7,000 individuals.

        - If the group will be composed of specimens that are *individually accessioned by a vendor*, each must be added separately, so enter 1.
        - **If this is a 'birth' event, leave the cursor in the <Count> field and click the <Notes> box or the 'Save' button.**
            - If you inadvertently get into the <Vendor> field, there is no way to leave without an entry, so use your mnemonic and make <Their ID> NONE; complete the entry and save it, but return to the transaction and delete the unwanted information: simply highlight the information you wish to change, delete it, and save.
            - The program will be modified in the future so that if 'birth' is selected, the <Vendor> and <Vendor ID> fields will be dimmed (i.e. will not require entries).
    - <From>
        - This field and <Their ID> should be blank if the count begins with a simple birth.
        - If the specimen(s) arrived from another facility, enter that facility's mnemonic.
        - Time-saver: you need type only until the name in the field is the correct name.
    - <Their ID>
        - If the specimens were accessioned by the vendor as a group, provide that group ID number.
        - If the specimens were individually identified at another facility, enter the first one of those ID numbers. (The remaining individuals will be added in later steps.)
    - <Notes>: enter appropriate or necessary notes here or, if you prefer, on the [NOTES] tab.
        - Notes made on this tab
            - appear on specimen reports immediately following the transaction to which they apply.
            - are included in comment retrieval searches based on specified word or text, but cannot be searched for by code since they have no note code associated with them.
        - Entries made on the [NOTES] tab
            - appear in the Notes section of specimen reports, i.e. separate from the transaction.
            - can be searched for by comment code as well as by specified word or text.
    - Select the 'Save' button.
- If this is a 'birth, loan in' or 'birth, loan out', return to the [VISITS] tab and edit the birth to the appropriate transaction.
    - Simply highlight the transaction you wish to change, select the correct transaction from the pop-up menu, add vendor/recipient name and ID, and save.
    - This step will be unnecessary once the program is modified to accept these transactions as it does all other transactions.
- If the parents are known, add that information on [SIRE] and [DAM] tabs.

    - If the dam and sire are part of a group, the same group accession number is entered for both sire and dam.
    - Multiple sires and dams can be recorded.
    - If different parents are represented by various members of the group, add these parents on the [Sire] and [Dam] tabs and use the birth dates of the offspring in the <Date> field on those tabs. Add a note on those lines explaining that these parents represent only those born on that date.
- Enter information on other tabs as required or desired and save.
- If this was only the first of several specimens to be added, continue adding additional individuals until all are included in this group; see below, "Working with specimens and groups already at your facility -- Adding to or removing from an existing group". Save after each addition.

WORKING WITH INDIVIDUAL AND GROUP ACCESSIONS ALREADY AT YOUR FACILITY

EDITING (CHANGING) A TRANSACTION FOR AN EXISTING GROUP ACCESSION

Data entry procedures
- Select the [VISITS] tab of the appropriate group accession.
- Select the field that needs to be deleted or changed, and delete the entry or enter the correct information.
- To delete an entire transaction, select 'Delete Transaction' or use the F8 button.
- Select the 'Save' button.

ADDING TO OR REMOVING FROM AN EXISTING GROUP ACCESSION

Note: if this is a transfer **to** or **from** an individual accession at your facility, see below "Creating an individual accession for a single specimen removed from a group accession" or "Creating a group accession from several individual accessions".

Data entry procedures
- Select the [VISITS] tab of the appropriate group accession.
- Select 'Add transaction' or use the F6 button.
- Provide the requested information.
    - <Date> of this new transaction
        - If this is the addition of one of a series of individually accessioned specimens from another facility, the date will be the same for all additions.
        - If this is the addition or removal of several specimens as a group, there will be only one date and one transaction.
    - <Transaction> type
        - Both additions and removals are done in this field.
        - Select the appropriate transaction from the pop-up menu.
            - If the reason for an inventory adjustment is known, use the appropriate transaction, e.g. when you find a number of dead fish in the aquarium, use 'death'.

            - When an adjustment is made to the count because of unknown circumstances, e.g. when an actual count does not agree with the sum of recorded transactions, use 'term-free acquisition' or 'term-free disposition' of the appropriate number to bring the recorded count to the actual number. Record a note, either in the <Notes> field on this line or on the [NOTES] tab, explaining the reason and circumstances for this transaction.
        - Time-saver: typing the first letter of a transaction type selects that transaction.
        - NOTE: A "work-around" is necessary when recording the death of group members on loan at another facility where they are maintained as a group: you must first 'loan return' the appropriate number of specimens as of the death date, then record the death of those specimens. Be sure to add a note on the 'loan return' line or on the [NOTES] tab explaining that the animals did not physically return and that the 'return' was only to allow their removal from the record.
    - Enter the <Count> of specimens involved.
        - If this is the addition of one of a series of individually accessioned specimens from another facility, enter 1.
        - **If this is a 'birth' or 'death' event, leave the cursor in the <Count> field and click the <Notes> box or the 'Save' button.**
            - If you inadvertently get into the <Vendor> field, there is no way to leave without an entry, so use your mnemonic and make <Their ID> NONE; complete the entry and save it, but return to the transaction and delete the unwanted information: simply highlight the information you wish to change, delete it, and save.
            - The program will be modified in the future so that if 'birth' or 'death' is selected, the <Vendor> and <Vendor ID> fields will be dimmed (i.e. will not require entries).
    - Enter any <Notes> here, or if desired, on the [NOTES] tab.
        - Notes made on this tab
            - appear on specimen reports immediately following the transaction to which they apply.
            - are included in comment retrieval searches based on specified word or text, but cannot be searched for by code since they have no note code associated with them.
        - Entries made on the [NOTES] tab
            - appear in the Notes section of specimen reports, i.e. separate from the transaction.
            - can be searched for by comment code as well as by specified word or text.
- Select the 'Save' button.
- If the parents of the added specimens are known but are different from the parents of others already in the group, add these parents on the [Sire] and [Dam] tabs but use either the birthdate of the offspring or the date of their entry into the group in the <Date> field on those tabs. Add a note on those lines explaining that these parents represent only those born on that date or those which entered the group on that date.

- If this is only one of several additions or removals, continue adding or removing additional specimens; save after each.
- Enter information on other tabs as required or desired and save.

CREATING AN INDIVIDUAL RECORD FOR A SINGLE SPECIMEN REMOVED FROM A GROUP ACCESSION

An individual should be removed from a group accession when it is made individually identifiable because it

- has been tagged, banded, transpondered, etc.,
- acquires some differentiating feature, such as a scar or color pattern,
- is moved to an enclosure separate from others of the species,
- is the sole remaining specimen of the group, or
- is removed from the institution and sent to another facility as a single animal.

This course should be followed even if the newly-individualized specimen physically remains within the group/colony.

Data entry procedures

- Create a new individual record, including all appropriate information from the group record, e.g. captive/wild birth type, birth location, etc. If necessary, estimate dates based on information contained in the group record.
- <Date> is the date of removal from the group.
- Transaction <Type> is 'term free acquisition'.
- Use your mnemonic in the <Vendor> field.
    - o Note: if your mnemonic is one of several similar entries in the institution list (e.g. BUFFALO), you must use a special routine until a bug is corrected: use the Lookup feature or the F2 button to bring up the institution list, type your mnemonic, then select the 'close' button. The time spent in doing this is made up when the 'automatic group change' routine works correctly as a result.
- <Their ID> is the accession # of the group from which the specimen is removed.
- Answer 'Yes' to the question "Would you like to decrement that group by one?" At this point, ARKS4 adds a disposition transaction and note to the group record to document the removal.
- Select the 'Save' button.
- Enter information on other tabs as required or desired and save.
    - o If the individual was born in the group, use your mnemonic and the group ID # for both dam and sire unless other information is found in the group record.
    - o Enter an Acquisition note (code NA) on the [NOTES] tab of the individual record explaining the removal from the group.
        - ▪ Time saver: when multiple specimens are removed from the same group, use the Batch Notes feature to add this explanation to all new individual records.
- Repeat for each individual removed.
- To the group record, add a Disposition note (code NO) or edit the [VISITS] note of the group record to explain the reason for the removal(s).
    - o Time savers:

        - Avoid a lengthy list of identical removal notes on the group record: add one explanatory note to the last transaction in a series of removals.
        - Use the Windows "copy and paste" ability: copy the Acquisition Note from the new individual accession (or the batch note) and paste it as the Disposition Note in the group record.

CREATING A GROUP ACCESSION FROM SEVERAL INDIVIDUAL ACCESSIONS
When two or more individually-accessioned specimens can no longer be differentiated from others of that species or subspecies, they should become a group accession.

Data entry procedures

- Create the new group record as above, "Accessioning a new group".
    - transaction <Type> is 'term-free acquisition'.
    - <Count>: initiate the group with <u>one</u> specimen.
    - <From> is your mnemonic.
    - <Their ID> is your individual ID# for this first specimen.
- Deaccession the individual with which you initiated the group.
    - <Date> is the date of transfer to the group.
    - <Disposition type> is 'term-free disposition' and <Disposition of'> is 'both legal and physical specimen'.
    - Use your mnemonic in the <Recipient> field.
        - Note: if your mnemonic is one of several similar entries in the institution list (e.g. BUFFALO), you must use a special routine until a bug is corrected: use the Lookup feature or F2 button to get the institution list, select your mnemonic, then select the 'close' button. The time spent in using this route is made up when the 'automatic group change' works correctly as a result.
    - In the <Recipient ID> field, enter the new group accession number.
    - <u>For this initial individual only</u>, answer 'No' to the question "Would you like to increment that group by one?" (You have already added this one.)
    - Select the 'Save' button.
    - Enter information on this or other tabs as required or desired and save.
- Deaccession additional individuals one at a time.
    - Remember to select from the institution list if your mnemonic is one of several similar entries on the list.
    - For each individual <u>after the initial one</u>, answer 'Yes' to the question "Would you like to increment that group by one?" At this point, ARKS4 adds a transaction and note to the group record to document the addition.
    - Select the 'Save' button.
    - Enter information on other tabs as required or desired, and save.
- To the record for each individual removed, add a Disposition Note (code NO) on the [NOTES] tab explaining the loss of individual identity.
    - Time saver: use the Batch Notes feature to add this explanation to the records of all individuals being added to the group at the same time.
- If desired, edit the automatically-generated note on the group record [VISITS] tab to further clarify the reason for addition to the group.

- Time savers:
    - Avoid a lengthy list of identical acquisition notes in the group record: place one explanatory note in the last transaction in a series of additions.
    - Use the Windows "copy and paste" ability: copy the Disposition Note from the individual accessions (or the batch note) and paste it into the note of the group record.

CREATING A NEW GROUP ACCESSION FROM AN EXISTING GROUP ACCESSION

Sometimes, a number of specimens are removed from one group accession in order to create an additional group accession.

Data entry procedures

- Create the new group record (follow the procedure outlined in "Accessioning a new group", above).
    - The <Date> of acquisition is the date of transfer from the existing group.
    - Use ‘term-free acquisition'.
    - <Count> is the number of specimens transferred to the new group accession.
    - <From> is your mnemonic.
    - <Their ID> is the originating group accession #.
    - Enter any necessary or appropriate <Notes> here or, if you prefer, on the [NOTES] tab.
    - Select the 'Save' button.
    - Enter information on other tabs as required or desired and save.
- Edit the record of the originating group to remove the specimens -- see "Adding to or removing from an existing group", above.
    - <Their ID> is the number group accession #.
    - <Notes>: enter appropriate or necessary notes here or, if you prefer, on the [NOTES] tab.
    - Select the 'Save' button.
    - Enter information on other tabs as required or desired and save.
    - Time saver: use the Windows "copy and paste" ability: copy the Disposition Note from the originating group record and paste it into the Acquisition Note of the new group record.