



## How to Publish a Studbook using PopLink

1. Open a Microsoft Word Document
2. Create a Cover page with these required items or contact the PMC Studbook Analyst ([pmc@lpzoo.org](mailto:pmc@lpzoo.org)) for a publication template:
  - a. Species common name, species scientific name, studbook keeper name, studbook keeper institution, studbook keeper e-mail, and geographical and chronological scope can be found in the Studbook Overview tab in PopLink
  - b. Date that the Studbook Data is current to
  - c. Date of the Studbook Publication
  - d. Photo of species
3. Create a Table of Contents
4. Create a Table including the Living Population
  - a. Open studbook in PopLink
  - b. Click on the Reports menu and select Studbook Report
  - c. In the 'Sort By' menu, select 'Current Location'
  - d. Click on the 'Filter By' button
    - i. In the 'Status' tab, check Living
    - ii. In the 'Date' tab, check 'As of End Date'
  - e. Click ok twice and your report will appear on the screen
  - f. Click on the 'Export' button at the top right of the report
    - i. When using PopLink version 2.2 and subsequent versions, reports will automatically export to your internet browser. You can copy/paste the reports into the studbook document, OR find the reports in your PopLink Databases folder.
  - g. Find the studbook report by opening the folder appropriate for the version of PopLink you are using
    - i. For PopLink 1.3 - C:\Program Files\PopLink 1.3\PopLink Databases\Studbook name
    - ii. For PopLink 2.1 - C:\Documents and Settings\your computer's name\My Documents\PopLink 2.1\PopLink Databases
    - iii. For PopLink version 2.2, 2.3, and 2.4 - C:\Documents and Settings\your computer's name\Documents\PopLink\PopLink Databases
  - h. Right-click on the studbook report, go to 'Open With', and choose Microsoft Word
  - i. Copy from Microsoft Word OR your internet browser and paste the living population table into your studbook document
  - j. Format the table
    - i. Highlight the entire table
    - ii. Right-click over the table and select 'Table Properties...'
    - iii. In the 'Row' tab, uncheck "Allow row to break across pages" and click ok
    - iv. Highlight the header row (i.e. first row) of the table
    - v. Right click over the header row and select 'Table Properties...'
    - vi. In the 'Row' tab, check "Repeat as header row at the top of each page" and click ok
    - vii. Highlight the entire table again and change the font size to 10
5. Create a Table including the entire Historical Population
  - a. Click on the Reports menu and select Studbook Report
  - b. In the 'Sort By' menu, select 'Studbook ID'
  - c. Click ok and your report will appear on the screen
  - d. Click on the 'Export' button at the top right of the report
  - e. Find the studbook report by opening the folder appropriate for the version of PopLink you are using OR copy and paste the report from your internet browser if using PopLink 2.2 or 2.3
    - i. For PopLink 1.3 - C:\Program Files\PopLink 1.3\PopLink Databases\Studbook name



- ii. For PopLink 2.1 - C:\Documents and Settings\your computer's name\My Documents\PopLink 2.1\PopLink Databases
      - iii. For PopLink 2.2, 2.3, and 2.4 - C:\Documents and Settings\your computer's name\Documents\PopLink\PopLink Databases
    - f. Right-click on the studbook report, go to 'Open With', and choose Microsoft Word
    - g. Copy and paste the historical population table into your studbook document
    - h. Format table as described above in step 4 j
  6. Create a Table of the Mnemonics for the Current Institutions
    - a. Click on the Reports menu and select Historic/Current Institution List
    - b. Click on the 'Export' button at the top right of the report
      - i. When using PopLink 2.2, 2.3, and 2.4, reports will automatically export to your internet browser. You can copy/paste the reports into the studbook document, OR find the reports in your PopLink Databases folder.
    - c. Find Historic/Current Institution List Report by opening the folder appropriate for the version of PopLink you are using
      - i. For PopLink 1.3 - C:\Program Files\PopLink 1.3\PopLink Databases\ Studbook name
      - ii. For PopLink 2.1 - C:\Documents and Settings\your computer's name\My Documents\PopLink 2.1\PopLink Databases
      - iii. For PopLink 2.2, 2.3, and 2.4 - C:\Documents and Settings\your computer's name\Documents\PopLink\PopLink Databases
    - d. Right-click on the Historic/Current Institution List Report, go to 'Open with', and choose Microsoft Word or copy/paste the report from your internet browser if using PopLink 2.2 or subsequent versions
    - e. Combine the mnemonics found in the AZA and non-AZA lists to create one column of mnemonics
    - f. In order to fit the Historic/Current Institution List in the document, you may delete all of the columns after the "Mail Code" column
  7. Update the Studbook Disclaimer with today's date and studbook keeper institution
    - a. Insert this disclaimer into the Word document
  8. Add any extra information to your studbook (e.g., natural history, husbandry, bibliography)
  9. Add a list of Data Field Descriptions (These are the default definitions. Change them to reflect any differences in your studbook)

**Studbook ID** – unique number assigned to each individual in the studbook. The studbook number is a permanent number.

**Birth Date** – This field indicates the date of an animal's birth. There is a birth date for every individual. Please check the next column "Birth Date Est." to judge the accuracy of that date.

**Birth Date Est.** – Indicated if the Birth Date field is an estimate.

None = No estimation

Day = The day is estimated

Month = The month is estimated

Year = The actual birth date is within the year of the Birth Date field

**Sire/Dam** –

Numbers indicate the Studbook ID of the parents of the zoo born animals

WILD indicates that an animal was wild caught and its parents are unknown wild individuals

UNK indicates that the animal was zoo-born but identification of the parents is not known

MULT indicates that there are several possible parents in zoos, but the specific one could not be determined. A parental assumptions note in the Specimen Notes field is included with this parental designation to indicate which animals could be the potential parent.

**Sex** – male, female, unknown

**Event** – This field documents the movements of individual animals from the first location to the current or last known location. This includes Birth/Hatch, Transfer, Death, Go LTF (Lost to Follow



up), Return from LTF, and Release. UNKNOWN indicates that the animal exists or existed, but its location cannot be reliably confirmed.

**Location** – This field indicates the location where the event took place.

**Local ID** – This is the number assigned by the institution in which the event took place.

UNKNOWN indicates that either an ID was not assigned or no information exists to indicate that an ID was assigned.

**Date** – This field documents the date that events occurred. Each event has a date associated with it. Also, check the adjacent column (Date Est.) to determine the accuracy of this date.

**Date Est.** – Indicates if the adjacent Date field is an estimate.

None = No estimation

Day = The day is estimated

Month = The month is estimated

Year = The actual date is within the year of the Event Date field

**House Name** – This field indicates the name given to the animal at a specific location.

Individuals may be given a different house name each time they move to a different location.

10. Add any data conventions in your studbook that are not outlined in the AZA Data Entry Guidelines Manual

11. Update the Table of Contents

12. Click on Adobe PDF and select convert to Adobe PDF and save the PDF to your desktop.

**Complete both 13 & 14 to finalize your Studbook Publication:**

13. \*E-mail a copy of the Studbook Publication PDF to both [Conservation@AZA.org](mailto:Conservation@AZA.org) and [PMC@LPZoo.org](mailto:PMC@LPZoo.org).

14. \*Then send a copy of your database for archiving to [PMC@LPZoo.org](mailto:PMC@LPZoo.org) using <https://wetransfer.com/>

a. Data.bin files can be sent as email attachments

b. The PMC *cannot* receive ZIP files

c. You may send your files using your preferred file transfer service: DropBox, OneDrive, Box, ShareFile, etc.

*\*Required to fulfill accountability deadline.*