

LOCAL ADMIN TRAINING INDEX

This Index contains the training documents and PowerPoints that will help a User with the Role of Local Admin at their institution become acquainted with their responsibilities. Most of these topics are found in the My Institution module of ZIMS. Each institution is managed differently and some of these responsibilities may fall to other Staff members.

Contact support@Species360.org

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Overview

Description: Brief overview of the Local Admin responsibilities

Features Available:

- **Feature:** ZIMS Overview
- **Feature:** My Institution Topics
- **Feature:** Onboarding Skills
- **Feature:** Requesting Enhancements
- **Feature:** Member Maps, Animal Charts and Data Quality

Related Materials:

- [Local Admin Responsibilities](#): PowerPoint on Local Admin responsibilities
- [Post-Deployment Skills](#): A checklist of skill that should be learned post-deployment
- [Intro to ZIMS](#): PowerPoint overview of ZIMS concepts and navigation
- [Requesting Enhancements](#): PowerPoint on how to request Enhancements
- [Maps, Charts and Data Quality](#): PPT on using the tools in ZIMS to track members, animal statistics and data quality

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Institution Preferences and Customization

Description: Setting the Preferences for your Institution and other customization of ZIMS

Features Available:

- **Feature:** Save and Save & Apply to All Users
- **Feature:** List of Preferences available
- **Feature:** Column customization

Related Materials:

- [Preferences:](#) Help document detailing all Preferences, including Institution Preferences
- [Column customization:](#) Help document column customization

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Managing Staff

Description: Managing your Staff in ZIMS

Features Available:

- **Feature:** Adding and editing Staff
- **Feature:** Email confirmation

Related Materials:

- [Add Edit Staff:](#) Help document on adding and editing Staff
- [Email Confirmation Help:](#) Help document on Email confirmation requirements
- [Email Confirmation PPT:](#) PowerPoint on Email confirmation

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Creating and Assigning Husbandry Roles

Description: Roles management

Features Available:

- **Feature:** How to assign Roles
- **Feature:** Access for Template Roles
- **Feature:** How to create custom Roles
- **Feature:** ZIMS access by Role

Related Materials:

- [Roles Access:](#) Excel file of ZIMS access per Role
- [Assigning Roles:](#) Help document on assigning ZIMS Roles
- [Species360 Roles:](#) Help document on the access for the Species360 Template Roles
- [Custom Roles:](#) Help document on creating custom ZIMS Roles

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Departments and Teams

Description: How to add and management Departments and Teams

Features Available:

- **Feature:** Managing Departments
- **Feature:** Managing Teams

Related Materials:

- [Managing Department and Teams](#): Help document on Departments and Teams

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Collections

Description: Creating Collections and assigning animals

Features Available:

- **Feature:** Adding new Collections
- **Feature:** Local versus Global Scope
- **Feature:** Assigning animals to Collections
- **Feature:** Editing Collections and assignments

Related Materials:

- [Collections](#): Help document on Collections

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Adding Institutions

Description: How to search for institutions and add a new Local institution

Features Available:

- **Feature:** Searching for institutions
- **Feature:** Adding a new Local institution

Related Materials:

- [Institution Search and Add](#): Help document on searching for institutions and adding a new Local institution

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External Sharing

Description: Default global sharing and External Sharing

Features Available: What data is globally shared by default

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- **Feature:** What additional data is shared with External Sharing
- **Feature:** How to Externally Share a record
- **Feature:** How to find who is sharing records with you

Related Materials:

- [Global Data and External Sharing](#): Comprehensive Help document on what data is shared globally by default and how to externally share records
- [External Sharing](#): PowerPoint on External Sharing – slides 33-34

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Collection Planning

Description: Adding and finding Animals Available and Species Wanted

Features Available:

- **Feature:** Animals Available
- **Feature:** Species Wanted
- **Feature:** Using Animal Lists
- **Feature:** Searching the listings
- **Feature: Planned Taxa:** Add Planned Taxa to an Enclosure
- **Feature: Management Plan:** Add Management Plan information to an Animal

Related Materials:

- [Animals Available and Species Wanted](#): Help document on creating and finding Animals Available and Species Wanted
- [Collection Planning](#): Help document on Collection Planning functionality

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Contact Directory

Description: Using the ZIMS Contact Directory

Features Available:

- **Feature:** Adding Contacts
- **Feature:** Searching Contacts

Related Materials:

- [Contact Directory](#): Help document for adding Contacts and searching the Directory

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Measurement Preferences

Description: How to shorten your measurement list terms

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Features Available:

- **Feature:** Using Measurement Preferences

Related Materials:

- [Measurement Preferences](#): Help document on using Measurement Preferences

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Transponders

Description: Managing Transponders**Features Available:**

- **Feature:** Adding a Transponder to the inventory
- **Feature:** Updating the Status of a Transponder

Related Materials:

- [Transponders](#): Help document on managing Transponders

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Permits

Description: Managing Permits in ZIMS**Features Available:**

- **Feature:** Adding a Permit
- **Feature:** Updating Permit Status
- **Feature:** Assigning a Permit
- **Feature:** Finding Global Permits

Related Materials:

- [Permits](#): Help document on creating, assigning and finding Permits

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Multiple Institutions

Description: Managing access to multiple institutions**Features Available:**

- **Feature:** Parent/Child relationship set up
- **Feature:** Assigning access to multiple institutions
- **Feature:** Switching between institutions
- **Feature:** Setting default institution

Related Materials:

- [Multiple Institutions](#): Help document on assigning Users to multiple institutions

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Advanced Access Management

Description: How to use Advanced Access Management

Features Available:

- **Feature:** Description of what AAM does
- Global/Local Admin activation
- **Feature:** How to assign AAM access by Department
- **Feature:** Use case scenarios

Related Materials:

- [AAM Overview](#): An overview of what AAM is
- [AAM](#): a PowerPoint on how to use AAM

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