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: My Institution Topics
- Feature: Customizing ZIMS

Related Materials:

It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.

www.Species360.org – Global Information Serving Conservation
- Local Admin Overview: PowerPoint on Local Admin responsibilities

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
- ZIMS Customization: Help document on preferences and additional ways to customize ZIMS

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

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

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www.Species360.org – Global Information Serving Conservation
- **Species360 Template 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:**
- [Local Institution](#): 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

- 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

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

Contact Directory

Description: Using the ZIMS Contact Directory

Features Available:

- Feature: Adding Contacts
- Feature: Searching Contacts

Related Materials:

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www.Species360.org – Global Information Serving Conservation
Measurement Preferences
Description: How to shorten your measurement list terms
Features Available:
  • Feature: Using Measurement Preferences
Related Materials:
  • Measurement Preferences: Help document on using Measurement Preferences

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

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

Multiple Institutions
Description: Managing access to multiple institutions
Features Available:
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www.Species360.org – Global Information Serving Conservation
• **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 Help](#): Help document for using AAM
• [AAM PPT](#): PowerPoint for using AAM

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*Revised 16 October 2019*