



# Assigning Role Access in ZIMS

#### Contact Species360 Support

Enabling a staff person as a ZIMS User will assume that they have access to the email address provided for their account. <u>ZIMS utilizes a secure log-on system called Auth0</u> and this requires that they can access emails sent from ZIMS for password access, reset's and more.

Until you assign a Role to your staff, they will have no access to ZIMS. These Roles can be Species360 managed template roles or custom roles that you have created for your institution. How you assign the role is the same for each type.

Assigning Roles Hidden Role Rights for Local Administrators Hidden Role Rights for Medical Administrators More Documents

# **Assigning Roles**

To assign a ZIMS role go to Start > Institution > My Institution > Staff grid. Highlight the staff member and select View/Edit ZIMS Login Details from the Actions menu. Note that the View/Assign Medical Roles is not activated. That is because you must first assign access to the Husbandry module before you can assign access to the Medical module. This can be a read only role for Husbandry if you want.

							Animals Ava	llable
Confirmed	Christine Dear	/ Zookeeper/Aquarist	Keeper	8	~	Offline	<ul> <li>Click he</li> </ul>	ere for
Unconfirmed	clinic intern	/ Student	clinicintern, MedIntern	~	×	Offline	Transponder	rs
Unconfirmed	Daffy Duck	/ Species360 Invoice		×	×	049:	▷ <- Click he	ere for
Confirmed	Dindy McDaniel	/ Zookeeper/Aquarist	Keeper	8	Vie Ado	w/Assign Medi d New Staff	cal Roles	ring
Confirmed	Edu Cation	Educator / Zookeeper/	Read Only	~	Nier	w/Edit Commu	nication Details	
Confirmed	Emily Andrews	/ Zookeeper/Aquarist	Keeper	~	Vie Vie	w/Edit Staff De	ogin Details	
Unconfirmed	Greg Garcia	/ Zookeeper/Aquarist	Keeper	~	X Mai	rk Selected Sta	ff Obsolete	
Confirmed	Jeff Bullock	Director / Institutio	curator, Local Admin	~	😰 Sig	send Confirmat	ion Email	
Unconfirmed	Jenn E Fair	/ Zookeeper/Aquarist	Keeper	8	×	Offline		

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View/Edit ZIMS Login Details		×
ZIMS User: Z 1 Email: Daffy@yahoo.gov	Locked Out: User Name: OaffyDuck	□ 2
User Role:	Selection:	A
Beta Daily Activity Access (Species360) Bird HR EOZ (Species360) Education Enclosure Access Enrichment and Training Feed logs Hand rearing Head Keeper Keeper Local Admin (ISIS use)	Approved keeper	3
Session Settings		
Force single session		
Limit Access By IP Nun	ber	
		Actions

1. You will need to check the ZIMS User box to activate the screen.

2. If the User is locked out you can unlock them here.

3. The Email will prefill from what was entered when the staff member was recorded. They can change this in My Preferences

4. Assign a unique User Name. They can also change this in My Preferences.

5. Assign the role by moving from the User Role box into the Selection box. You can assign multiple roles and the User will have all the functionality of both roles. But if more than one role is needed you may want to create a custom role that includes the desired access.
6. Click Save. When creating a ZIMS user and assigning roles for the first time an email will be sent to the user with a link to create a password for their account.





Population Manag (Species360) Read Only (Specie Posional According Session Setting Force singl	er 25360) 5 e session 1 55 By IP Numb	er 2			
				Actions •	
Scope	Туре	Subnet IP	Subnet Mask	Description	
4				4	
				r	
			3	🚽 Save 🚫	Ca

At the bottom of the screen you can:

1.Force single session so the User can be logged into ZIMS at only one computer at a time. 2.Limit Access by IP Number should you want to restrict ZIMS access to only limited computers such as at work.

3.Don't forget to Save.

2	Access Rule
r	Single IP Range IP
	Subnet IP *
	123 567 899 123
p	Description *
	✓ Active
ī	Save 🚫 Cancel
1	Save V Cancer

When limiting by IP address you must remember to check the Active box. Otherwise the IP limitation will not be activated.

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Confirmed	Ben Cooper	/ Zookeeper/Aquarist	Keeper Three	~	×	Offline
Confirmed	Christine Dear	/ Zookeeper/Aquarist	Keeper	~	8	Offline
Unconfirmed	clinic intern	/ Student	clinicintern, MedIntern	~	×	Offline
Unconfirmed	Daffy Duck	/ Species360 Invoice	Keeper Three	~	×	Offline
Confirmed	Dindy McDaniel	/ Zookeeper/Aquarist	Keeper	~	×	Offline
Confirmed	Edu Cation	Educator / Zookeeper/	Read Only	~	×	Offline
Conformed	E ar il a	1	Kaanan .			

The staff member now has a ZIMs Role assigned and is checked as a ZIMS User.

Now when you open the Actions menu for the staff member the View/Assign Medical Roles is activated.

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		Cooper	Zookeeper/Aquarist					Offline		An	imals A
	Confirmed	Christine Dear	/ Zookeeper/Aquarist	Keeper	~	~	2	Offline		⊳	<- Click
	Unconfirmed	clinic intern	/ Student	clinicintern, MedIntern	~	3	:	Offline		Tra	nspon
	Unconfirmed	Daffy	/ Species360	Keeper Three	<b>v</b>					$\triangleright$	<- Click
		Duck	Invoice			<b>N</b> 1	/iew/Ass	ign Medical F	loles		
	Confirmed	Dindy McDaniel	/ Zookeeper/Aquarist	Keeper	~	+ /	Add New	Staff			9
	Confirmed	Edu Cation	Educator /	Read Only	~	י 🕙 ו	/iew/Edi	t Communica	tion [	Detai	is <sup>k</sup>
	connec	200 00000	Zookeeper/	include only	Ť	N 1	/iew/Edi	t Staff Details			
	Confirmed	Emily	/ Zookeener/Aquarist	Keeper	<i>~</i>	۱ 🔊	/iew/Edi	t ZIMS Login	Deta	ils	
		Anurews	200Keeper/Aqualist				Aark Sel	ected Staff O	hsole	te	
	Unconfirmed	Greg	1	Keeper	<b>~</b>		1011 001	oolog olan o	00010		

To assign a Medical Role you must be assigned a Medical Admin Role. Move the desired role from the Medical Roles to the Selection and Save. When assigning Medical Roles, you do not have the option to Force Single Session or limit by IP number, that is only available in the Husbandry module Roles.





View/Assign Medical Roles		>
Medical Roles:	Selection:	-
Medical Admin (Species360) University User Medical (Species360) curator MedIntern Read-Only Medical (Species360)	Veterinarian (Species360)	

# What are Hidden Role Rights?

There are some functionalities that Local and Medical Admin Roles have access to that are not listed in the Role Selector. These are called "hidden Role rights".

# Features only available to Local Admin

#### Animal and Enclosure Lists

• Can edit and delete all Animal and Enclosure Lists, including those created by other Users, even if they aren't marked sharable/editable by the list creator.

# Locked Out Users

- Can unlock users if they have been locked out
- From the View/Edit ZIMS Login Details screen, uncheck Locked Out if checked:

View/Edit ZIMS Login Details		
ZIMS User: 🖉 Email:	Locked Out: User Name:	
sshcwenzer@greenville.gov	internclinic	
User Role:	Selection:	
Curator - [GREENVISC]  EOZ (Species360) GREENVISC_ARKS	clinicintern	

# Manage ZIMS Users

• Can see which users are online/offline at their institution under the My Institution > Staff grid:





earc	h form				Actions
	Job Title / Type	Roles	ZIM5 User	Public Contact	Online / Offline
ıl	/ Veterinary Manager		×	×	Offline
ne	/ Species360 Represe	Local Admin, Medical Admi	\$	8	<u>active</u> session(s)
st	/ Assistant Director	Local Admin (ISIS USE ONL	×	×	Offline
est	/ Administrative Ass	EOZ	~	×	Offline
а	/ Zookeeper/Aquarist	curator, Curator - [GREEN	~	×	Offline
	/ Zookeeper/Aquarist	Keeper Three	\$	×	Offline
	/ Curator/Collection	Medical Admin,	<i>~</i>	×	

• Can sign out a user's session and resend confirmation email under the My Institution > Staff grid:



# **Institution Preferences - ZIMS Accessibility and Features**

- Can turn on/off Advanced Access Management Features
- Can turn on/off Accessibility for External Sharing
- Can turn on/off Provisional Data Entry
- Can turn on/off display medical weights in husbandry record
- Can turn on/off the Care and Welfare module.
- Can see/edit Session Settings.
  - Force single session limits Users access to ZIMS to only one computer at a time. (NOTE: this can also be done at the individual Staff member level).

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 Limit Access by IP Number limits ZIMS access to only those IP addresses indicated (NOTE: It is recommended to limit by IP access at the Staff member level and not at the Institution level as you might lock yourself out!).

Back 🛃 Save & A	pply For All Users pports 5 american historical medical re	Cords.	ning, the receiving in	actuation can on
Optional ZIM5 Mod	dules			
Care and Welfare	2		On Off	
Limit Access E	3y IP Number		e	Actions -
Scope	Туре	Subnet IP	Subnet Mask	Descriptio

#### **Note Templates**

• Can edit/delete any locally created Note Templates including those created by other Users, even if they aren't marked sharable/editable by the list creator. Species360 global templates cannot be edited or deleted.

# Husbandry and Aquarist Daily Log Templates

• Can edit/delete any Husbandry Log or Aquarist Daily Log, including those created by other Users, even if they aren't marked sharable/editable by the log creator.

# Features only available to Medical Admin

# **Pharmacy Inventory**

- Reopen a bottle that has been marked as finished in the pharmacy inventory.
- An audit note is generated.





		1
Au	udit Notes	
⊿	2 2	
	Note	
	Bottle marked as finished by Adrienne Miller on Jan 11, 2019 Total usage: 1 millilitre	
	Bottle marked as open by Adrienne Miller on Jan 11, 2019	

#### Necropsy

- Unlock a locked necropsy record.
- An audit note is generated.

Audit Trail
Record locked by Adrienne Miller on Jan 11, 2019 at 09:23 AM
Record unlocked by Adrienne Miller on Jan 02, 2019 at 01:15 PM
Record locked by Adrienne Miller on Jan 02, 2019 at 01:13 PM

Institution Preferences - ZIMS Accessibility and Features

• Can turn on and select level for Medical Records Sharing

#### Other topics:

- ZIMSHELP-MyInstitution-add edit users
- ZIMSHELP-MyInstitution-Custom Roles
- ZIMSHELP-Medical medical roles
- ZIMSHELP-MyInstitution-Species360 Template<br/>Roles
- ZIMSHelp-Studbooks-Update Roles

#### Revised 27 September 2023