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. ZIMS utilizes a secure log-on system called Auth0 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
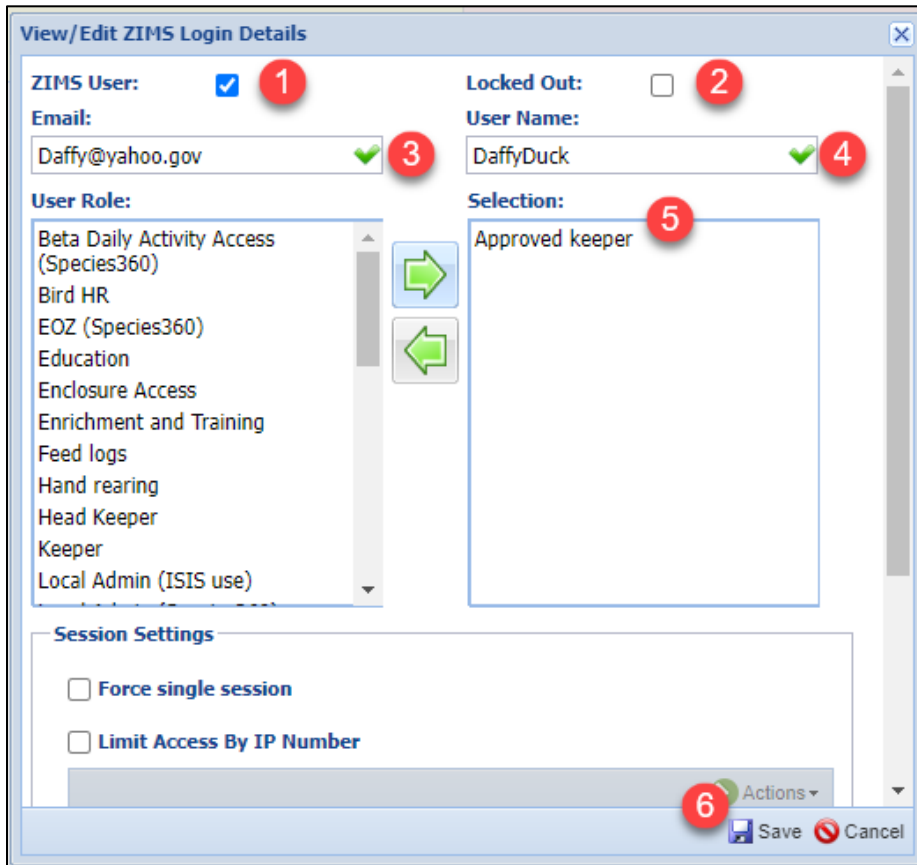More Documents

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.

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.
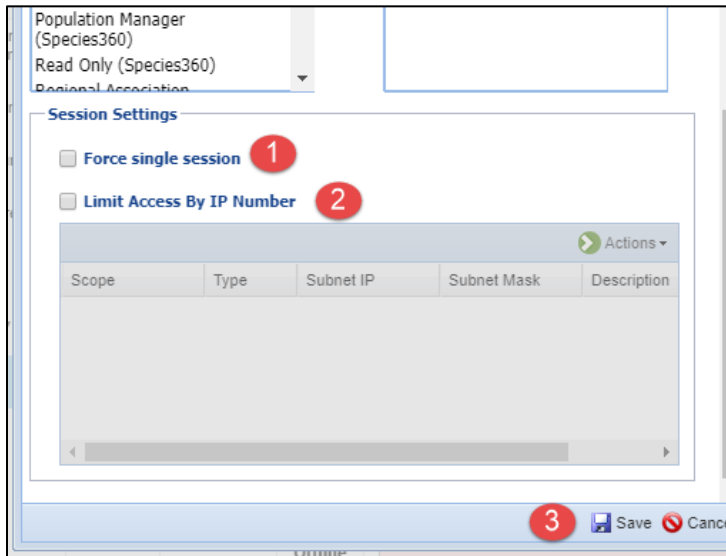
At the bottom of the screen you can:

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.
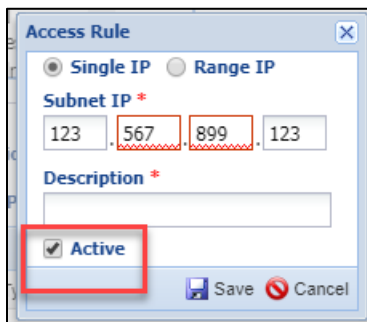
When limiting by IP address you must remember to check the Active box. Otherwise the IP limitation will not be activated.
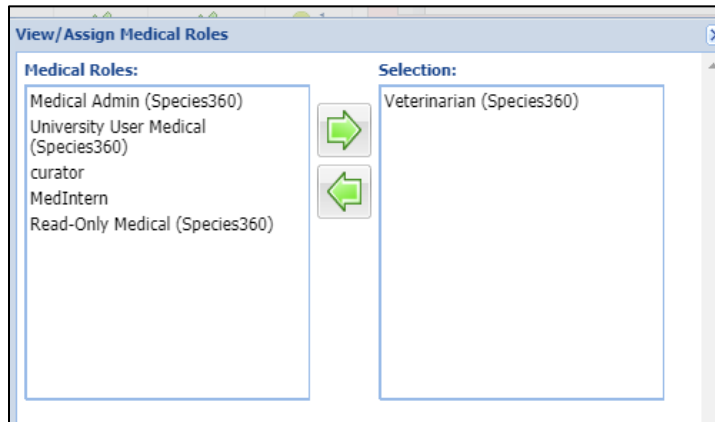
The staff member now has a ZIMs Role assigned and is checked as a ZIMS User.

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

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.

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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".
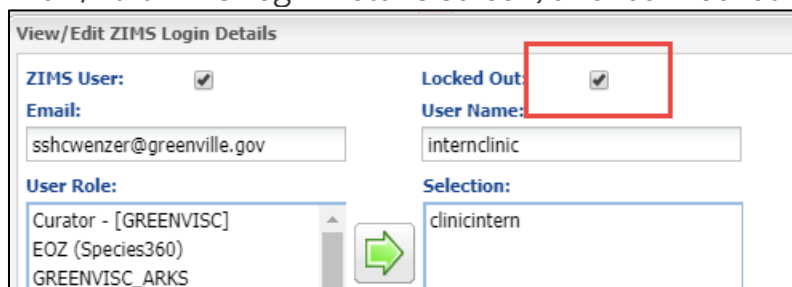
Features only available to Local Admin

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.
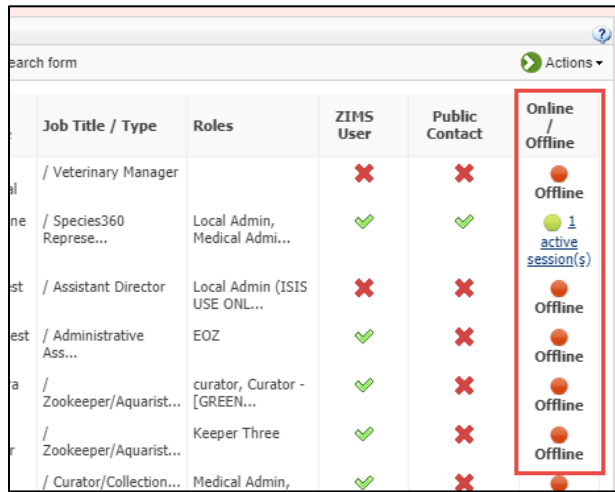
Locked Out Users

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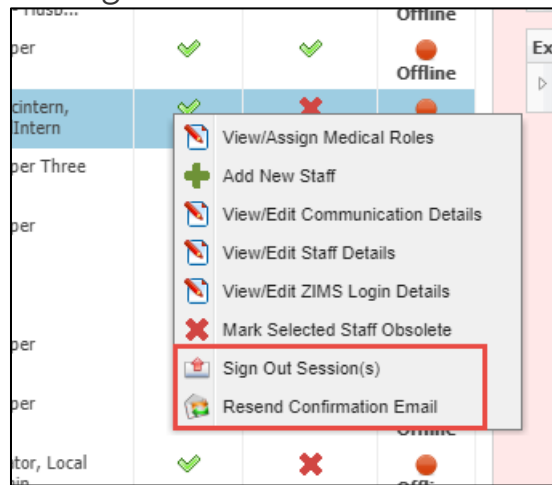

Manage ZIMS Users

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

- 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).

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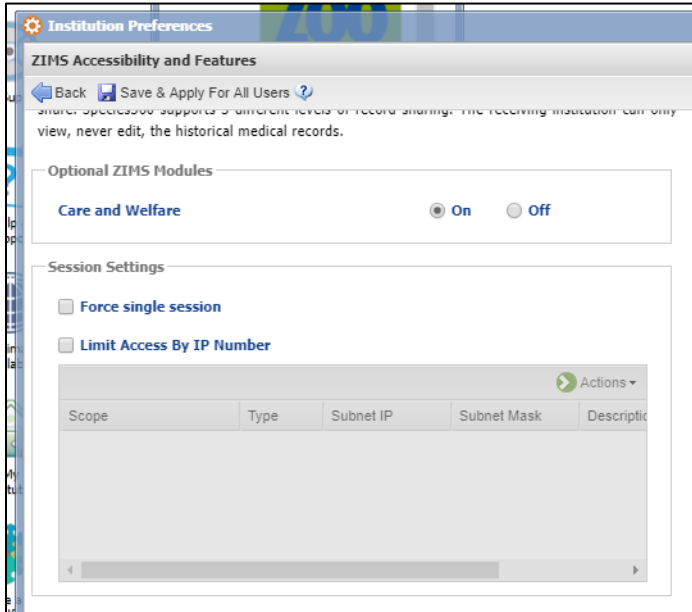
Note Templates
- Can edit/delete any locally created Note Templates including those created by other Users, even if they aren't marked sharable/editable by the list creator. Species360 global templates cannot be edited or deleted.

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.

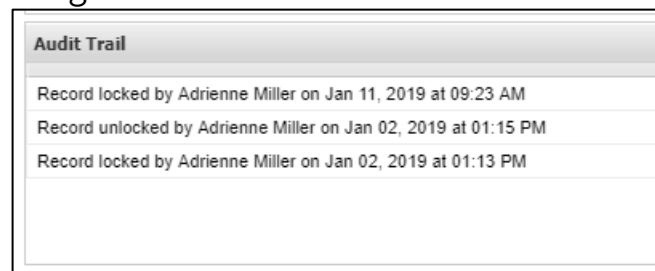## Features only available to Medical Admin
Pharmacy Inventory
- Reopen a bottle that has been marked as finished in the pharmacy inventory.
- An audit note is generated.
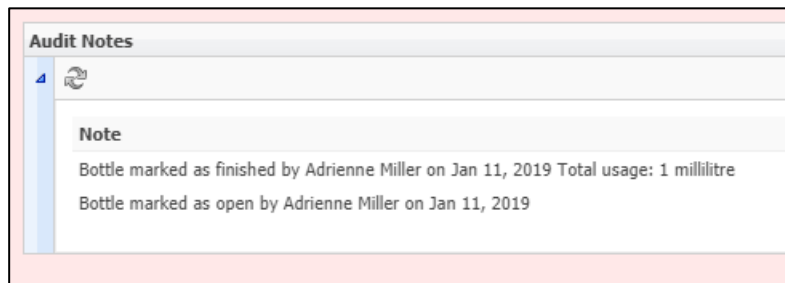
Necropsy

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

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 Roles](#)
- [ZIMSHelp-Studbooks-Update Roles](#)

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