
Creating and Managing Staff and ZIMS users

[Contact Species360 Support](#)

An over-arching help document where information can be found for adding Staff, creating ZIMS users, as well as managing account details such as passwords, usernames and email addresses in the future.

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Add a Staff Member

Local admins have the permissions to add Staff to their institution.

Staff members do not necessarily use ZIMS, but you may want their details in ZIMS so they can be referenced with various data that is added. For example: An observation may be recorded by a keeper in a diary, however it is the registrar that adds the information to ZIMS, the registrar has the option to record the observer as a staff members name if they have been added as a staff member at your institution.

To add a Staff Member:

1. Start Menu > Institution > My Institution > Open the Staff box.
2. Click Actions.
3. Click Add New Staff, and a pop-up box will open.

1. Complete any information marked with a red asterisk * it is important that each staff member has a [unique email address](#).
2. Click Save. This staff member will be sent a confirmation email from support@species360.org to the staff members email address added here. This **does not** create login details for that staff member.

Staff at Species360

Email Status	Full Name	Job Title / Type	Roles	ZIMS User	Public Contact	Online / Offline
Confirmed	Jane Smith	/ Zookeeper/Aquarist..		✘	✘	Offline

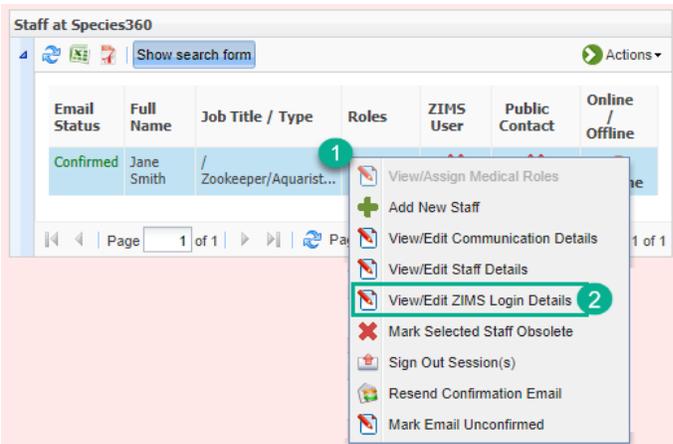
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When a staff member has been added and has confirmed their email address, their information will look like this. Notice that they currently have no roles, are not a ZIMS user and are not a public contact either.

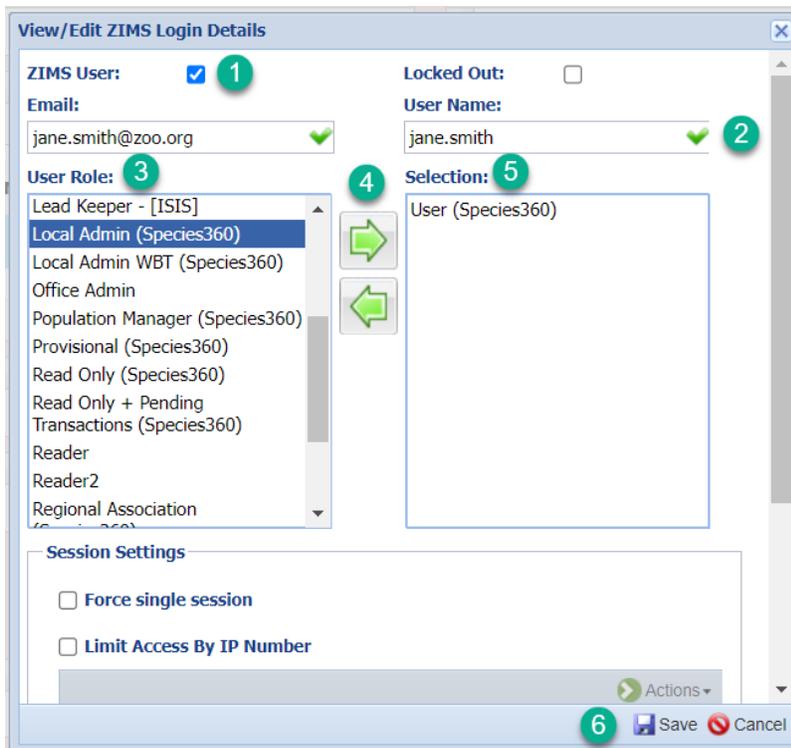
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Create a ZIMS user

Once a Staff Member has been added (see above), they can then be activated as a ZIMS user.

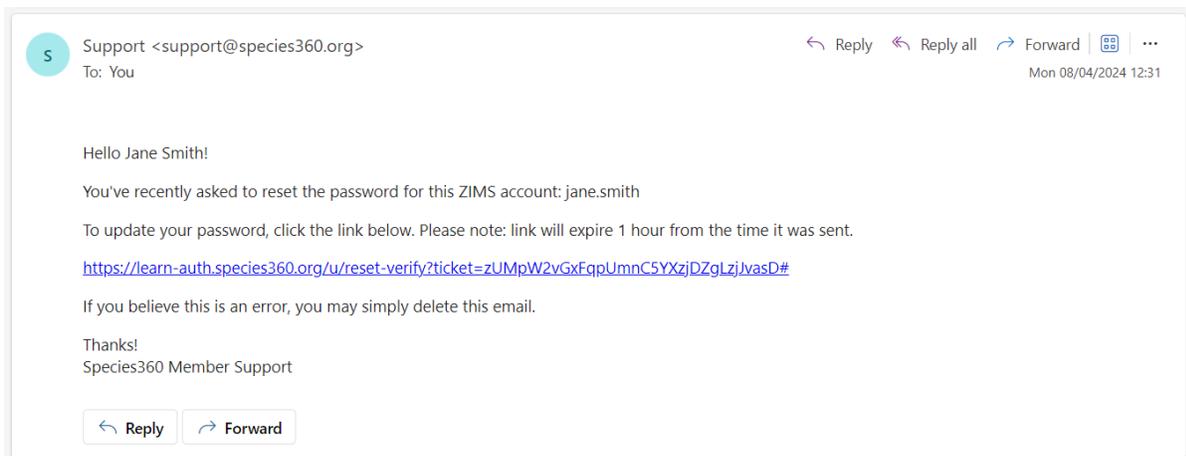


1. Select the Staff Member from the Staff box by right clicking on their name.
2. Select View/Edit ZIMS Login Details, and a pop-up box will open.



1. Tick the checkbox to create a ZIMS login for this Staff Member at your institution. This will unlock the fields below that were previously greyed out. It will also prefill the email field with the email address that was provided when adding the staff member.

2. Assign a username. This must be unique, and will highlight with a green tick if it is available.
3. To assign roles to a user you must highlight a role in the 'User Role' list by clicking on it.
4. Then click the arrow pointing right to add to the 'Selection' list.
5. Any Roles in the 'Selection' list are roles that are currently active for that user.
6. Click Save. The user will now be sent an email support@species360.org with a link to create a password. This link expires after one hour.



When the user clicks the link in the email they will be redirected to a page where they can create a password, and subsequently log into ZIMS.

Email Status	Full Name	Job Title / Type	Roles	ZIMS User	Public Contact	Online / Offline
Confirmed	Jane Smith	/ Zookeeper/Aquarist...	User			 Offline

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Now the Staff member is a ZIMS user and has a role assigned.

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Managing account settings for a ZIMS user – Local Admin Management

As a Local Admin you can update various information for ZIMS users, including changing their associated email address, username and send a reset password link.

Change Email address

1. Start > Institution > My Institution > Staff box
2. Right click the relevant ZIMS users name and select View/Edit ZIMS login details.
3. Change the email address.
4. Click Save. The user will be sent a confirmation email from support@species360.org to the updated email address. They will need to click the confirmation link in the email to confirm this update.

Change Username

5. Start > Institution > My Institution > Staff box
6. Right click the relevant ZIMS users name and select View/Edit ZIMS login details.
7. Change the Username.
8. Click Save. The user **will not be notified** of this change, so as Local Admin you will need to notify the ZIMS user.

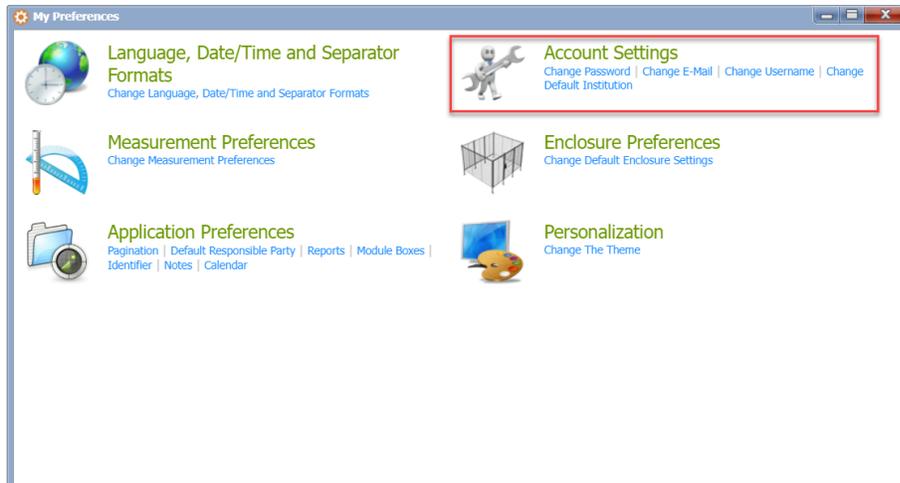
Reset Password

1. Start > Institution > My Institution > Staff box
2. Right click the relevant ZIMS users name and select View/Edit ZIMS login details.
3. Click the 'Reset Password' button next to Save.
4. The user will now be sent an email support@species360.org with a link to create a password. This link expires after one hour.

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Managing Account settings – User Management

Each ZIMS user has the ability to change various information associated their account. Users can do so by going to the Start Menu > My Preferences > Account Settings.



In the Account Settings menu, a ZIMS user can update their associated:

- Password
- Email
- Username
- Change default institution (if they are assigned to a Parent institution with multiple child institutions)

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Update Password – Login screen

If a user forgets their password, or the reset password link in the email from support@species360.org is expired before they click it, it is also possible to reset a password from the login screen.

1. Enter Username and click ‘Continue’.
2. Click the ‘Forgot Password?’ link
3. Click Continue on the next screen, and an email will be sent to the email address associated with the username, with instructions to reset your password.

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Unique email addresses

When adding new staff into your organization in ZIMS, the email address you supply must be unique (two staff members cannot share the same email address) and the email address must be valid (the staff person will receive a ‘confirmation email’ from ZIMS to ensure the account is valid and active).

For entries that are only Staff listings (the staff person will never log into ZIMS) the email confirmation is important but not required. For any staff that are also ZIMS Users (staff who log into ZIMS) the email confirmation is required before they will be allowed to log in.

As Local Admin you can resend the email confirmation link.

Head to the Start Menu > Institution > My Institution > Staff Box

Right click the relevant staff member in the list and select 'Resend email confirmation' from the drop-down menu.

Shared Email Account?

What if my users need to share an email address (e.g. all keepers use the same address keepers@OurZoo.org?)

- A free solution is available via a google email account.
 1. [Sign up for a GMAIL](#) account (example: ourzookeepers@gmail.com)
 2. [Set it up to forward](#) to your shared email address
 3. Test send email to the gmail address to ensure it is forwarding to your shared account
 4. Update your users in ZIMS using the following gmail trick to provide them with a unique email address. Add a "+" after the email address you chose and the @gmail.com to have an infinite amount of email addresses forwarding to your shared account.
Ex: ourzookeepers+SALLYKEEPER@gmail.com,
ourzookeepers+JONNYKEEPER@gmail.com,
[ourzookeepers+ECT@gmail.com](#)
 5. A variation of this trick is available for [Yahoo](#) and [Hotmail/Outlook](#) as well.

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Associated help documentation

- [Adding and Editing Staff in ZIMS](#)
- [Assigning Role Access in ZIMS \(create ZIMS user\)](#)
- [Logging into ZIMS via Auth0](#)

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