

Adding Local Institutions and Contacts

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You can add locally used institutions and contacts in ZIMS. Sending samples to an external laboratory that is not currently recorded in the ZIMS global institution list is an example of why you would want to add a local Institution. Using a Pathologist who is not a member of your institution’s staff is an example of why you would want to add a local Contact.

It is advised that you first search the global Institution List to be sure the institution you are looking for isn't already added. To search the list, open the Institution Search module and use the left hand search box. Enter as many filters as possible to restrict the results list. Below we searched for all active Laboratories in the United Kingdom.

The screenshot shows the 'Institution Search' interface. On the left, there are search filters: 'All Institutions' (selected), 'My Institutions', 'Name / Mnemonic / Synonym', 'Category' (set to 'Other'), 'Type' (set to 'Laboratory'), 'Country' (set to 'United Kingdom'), 'State/Province' (set to 'Please Select'), 'Species360 Institution Code', and checkboxes for 'Show Only Species360 Members', 'Show Only ZIMS Institutions', and 'Include Obsolete Institutions'. Under the 'Show' section, 'Active Institutions Only' is selected. A red box highlights the 'Add New' button at the top of the search results area. The main table displays search results for laboratories in the United Kingdom, with columns for Institution Name, Mnemonic, Country, State/Province, Species360 Me..., and ZIMS Institution. All 'ZIMS Institution' cells contain a red 'X'.

Institution Name	Mnemonic	Country	State/Province	Species360 Me...	ZIMS Institution
Animal Genetics	ANGEN UK	United Kingdom	Cornwall	✗	✗
Animal Health and Plant Agency	APHA	United Kingdom	Surrey	✗	✗
Animal Health Trust Diagnostic Lab	AHT LAB	United Kingdom	Suffolk	✗	✗
Biobest	BIOBEST	United Kingdom	Midlothian	✗	✗
Charles River UK Ltd	CR UK LTD	United Kingdom	Kent	✗	✗
Chester Zoo Endocrine Lab	CZENDOLAB	United Kingdom	Cheshire West and Chester	✗	✗
Eurofins UK	EUROFINS	United Kingdom		✗	✗
Intl Zoo Veterinary Group	IZVG	United Kingdom	York	✗	✗
MDS	MDSWNSCMB	United Kingdom	North Somerset	✗	✗
Pinmoore Animal Laboratory Services	PALS	United Kingdom	Cheshire West and Chester	✗	✗
Royal Veterinary College Hatfield	RVC HATF	United Kingdom	Hertfordshire	✗	✗
University of Surrey Veterinary Path...	USVETPATH	United Kingdom	Surrey	✗	✗

The Laboratory we want to add was not found so we will add a local Institution. Select the Add New button.

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The screenshot shows a form titled "Add New Institution" with the following fields and callouts:

- 1**: Institution Name * (Text input: "My New Lab")
- 2**: Institution Category * (Dropdown menu: "Other")
- 3**: Country * (Dropdown menu: "United Kingdom")
- 4**: Institution Type * (Dropdown menu: "Laboratory")
- 5**: State/Province (Dropdown menu: "Buckinghamshire")
- City (Text input: "Marlow")

1. The Name must be unique
2. The Institution Category will drive what is available to select in the Institution Type
3. Country is mandatory
4. Institution Type is a multiple select dropdown that is driven by the Institution Category
5. State/Province and City are not mandatory but helpful

When you select to Save you will be asked if you want to go to detail. Select Yes to add more information. You can add additional information such as Address, Phone and Fax Numbers and Website by selecting Actions > Edit Communication Details.

The screenshot shows the "Details" page for "My New Lab". It includes the following sections:

- Institution Profile**
 - Institution Details**
 - Name / Mnemonic: My New Lab /
 - Visible to all Species360 members: **X**
 - Species360 Membership: **X**
 - Institution Category: Other
 - Institution Type: Laboratory
 - Communication Details**
 - Address: ~
 - City: Marlow
 - State: Buckinghamshire
 - Country: ~
 - Phone: ~
 - Fax: ~
 - Email: ~
 - Website: ~
 - Geographical Location**
 - Continent: Europe
 - Country: United Kingdom
 - State: Buckinghamshire
 - Latitude: 0.00000000
 - Longitude: 0.00000000
- Actions**
 - Edit Details
 - Edit Communication Details
 - Mark This Institution Obsolete
- Synonyms**: <- Click here for det
- Institution Added By**: Adrienne Miller

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You can also add a local Contact for this new Institution. Go to Contacts grid > Actions > Add New Contact.

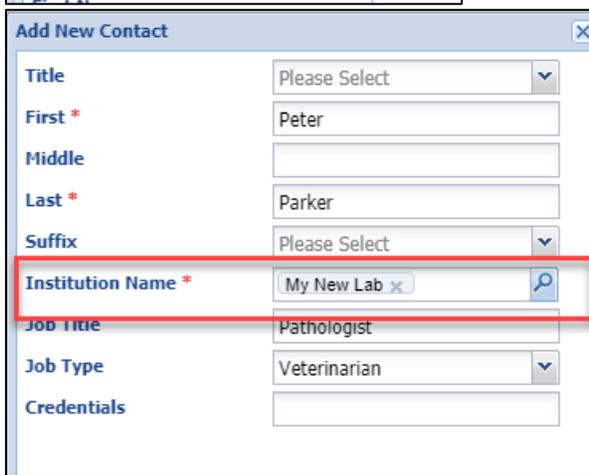
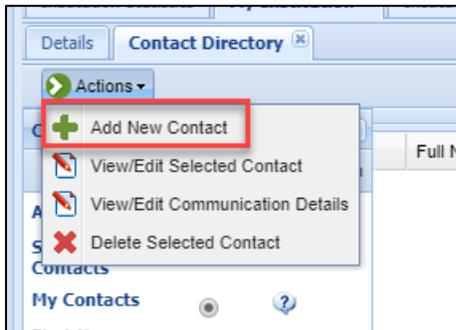
1 and 2. The only required fields are First and Last Name
3. Checking this box will let others outside your institution see the Contact

Another way to add a Contact is from the My Institution module. Select the Contact Directory tab.

Confirmation	Name	Role	Job Title	Checkmark	Red X	Offline Status
Unconfirmed	clinic intern	/ Student	clinicintern, MedIntern	✓	✗	Offline
Confirmed	Dindy McDaniel	/ Zookeeper/Aquarist...	Keeper	✓	✗	Offline
Confirmed	Edu Cation	Educator / Zookeeper/...	Read Only	✓	✗	Offline

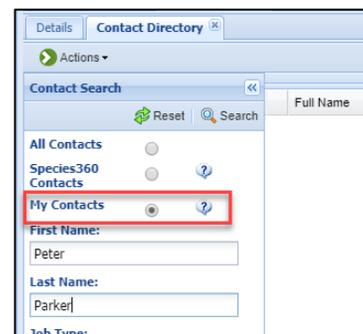
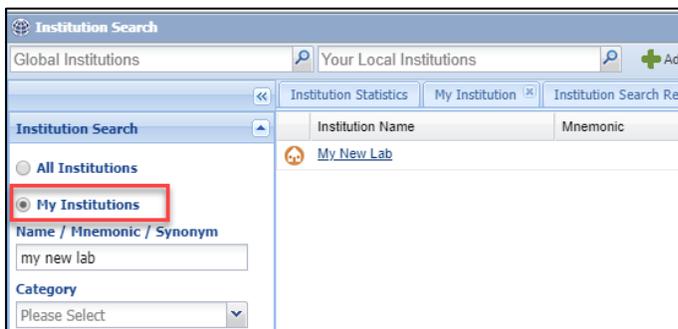
Under Actions select Add New Contact.

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The screen is the same as adding a Contact when the Institution is in focus (Institution record is open) as we did previously except for the addition of the Institution Name field which is mandatory.

When searching for either local Institutions or Contacts remember to check My Institutions or My Contacts to shorten the results list.



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