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Creating Custom Roles

Contact Species360 Support

If the Species360 Template Roles do not meet your needs, you can create custom Roles with the access that you need for your staff. It is important to note that when new ZIMS functionality is deployed these custom Roles will not be automatically updated as the Species360 Template Roles are, you will need to keep them updated manually.

To create a custom Role go to Start > Institution > My Institution > Husbandry/Administration Roles or Medical Roles > Actions > Add New.

The Role Name must be unique to your institution. If you want to start with a blank template, select Save once you have entered the name. If you want to copy either a Species360 template, or a custom Role you have already created, select the Role name from the Role Template dropdown list.

u i	Add New Role			X	
	Role Name *	Unique Name]		
Я	Role Template	Please Select 🗸	?€		Species360 Template Roles (Global Roles)
				$\tilde{\mathbf{\omega}}$	My Institution Roles (Local Roles)
				Sel cor	ected template role's functionalities will be ied over to the new role
			ļ		
		🛃 Save (🚫 Can	cel	
l				_	

To create the Role access, select Manage Role Access from either the Actions menu or by right clicking on the Role.

Studbook Keeper (Species360)	0	*
Unique Name	0	×
User (Species360)	🔶 Add New	~
Vet - [GREENVISC]	Niew/Edit Selected	×
	🔊 Manage Role Access	
	X Delete Selected	inge

Select the appropriate module from the dropdown list.

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房 Save		
Role Name	Unique Name	
Modules 🔇	~	
	Select One	
	1. Animal	
	2. Calendar	
	3. Enclosure	
	4. Global Reports & Tools	
	5. Institution	
	6. Life Support & Component	
	7. Local Reports & Tools	
	8. Studbook	
	9. Taxonomy	

Check the Turn on Module Functionality for This Role checkbox.

🛃 Save					
Role Name	Unique Name				
Modules 🔇	Animal		✓ 🗹 Turn on	module functionality for t	his role
Functionality				Actions	
Accession		Search/View	🗌 Add	Edit	Remo
Acq./Disp. Tra	nsaction	Search/View	🔲 Add	🔲 Edit	🗌 Remo
Alort		Soarch//iow	DbA 🔲	E dit	- Romo

We did not select a template for this Role so no functionality has been checked. If you had selected a template to use (either a Species360 template or another custom Role you already created) that functionality would be copied into this new Role and you can edit as desired. Note that in the Animal module you must give at least Search/View access to Animal Basic Detail in order to see any of the ZIMS Animal functionality. This is also true for the Enclosure module, access to at least Search/View for Basic Details must be given.

1odules 🧳 Animal		✓ Iurn on r	nodule functionality for t	this role		
Functionality			Actions			
Accession	Search/View	🔲 Add	Edit	Remove		
Acq./Disp. Transaction	Search/View	🔲 Add	🔲 Edit	Remove		
Alert	Search/View	🔲 Add	🔲 Edit	Remove	Provisional	
Animal Charts	Search/View	Add	Edit	Remove		
Animal Lists	Search/View	Add 🗌	Edit	Remove		
Animal/Basic Detail 🛛 🤇	🔰 🗌 Search/View	Add	🗌 Edit	Remove		
Carcass Recipient	Note: Search/View pe	rmissions on the Bas	ic Details is required at mi	nimum to allow a user to se	e any other records of this	
Collection Trip	module.				,	
Collection Trip Accession	Search/View	🗌 Add	🗌 Edit	Remove		
Contraception	Search/View	🔲 Add	🔲 Edit	Remove	Provisional	
Death Info	Search/View	Add	Edit	Remove		
Development Milestone	Search/View	Add	🗌 Edit	Remove	Provisional	

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For each function select the desired level of access. To save time at the bottom you have the ability to Check All or Uncheck All.

- Search/View This Role can search for and view the data for the functionality
- Add This Role can add data for the functionality
- Edit this Role can edit existing data for the functionality
- Remove this Role can remove existing data for the functionality
- Provisional Provisional entries are data that must be approved, usually by the Local Admin, before it becomes a true part of the ZIMS data. This Role can add data, edit existing data or remove existing data for that functionality as long as it remains Provisional. Once that data has been accepted by the Local Admin, this Role can no longer edit it.

1odules 🧳 Animal		✓ ✓ Turn on n	nodule functionality for	this role		
Functionality			Actions			
Accession	SearchAview	🔲 Add	Edit	Remove		-
Acq./Disp. Transaction	Search/View	🗌 Add	🔲 Edit	Remove		
Alert	✓ Search/View	Add	Edit	Remove	Provisional	
Animal Charts	Search/View	Add	Edit	Remove		
Animal Lists	Search/View	🗹 Add	🕑 Edit	Remove		
Animal/Basic Detail 🛛 🤇	🔰 🗹 Search/View	Add	🗌 Edit	Remove		
Carcass Recipient	Search/View	🗌 Add	🗌 Edit	Remove		
Collection Trip	Search/View	🗌 Add	🗌 Edit	Remove		
Collection Trip Accession	Search/View	Add 🗌	🗌 Edit	Remove		
Contraception	Search/View	Add 🖉	🗹 Edit	Remove	Provisional	
Death Info	Search/View	Add	Edit	Remove		
Development Milestone	Search/View	Add	Edit	Remove	Provisional	

Remember to Save before moving on to the next module. Continue to assign access for each module as desired. Once done this Role is now available to assign to the appropriate Users.

Remember that these custom Roles are not updated when new ZIMS functionality is deployed. It is up to each institution to manage their custom Roles.

For assistance with creating custom Roles contact support@Species360.org.

Other topics:

- ZIMSHELP-MyInstitution-add edit users
- ZIMSHELP-MyInstitution-Assigning Roles
- ZIMSHELP-Medical medical roles
- ZIMSHELP-MyInstitution-Species360 Template Roles
- ZIMSHelp-Studbooks-Update Roles

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