

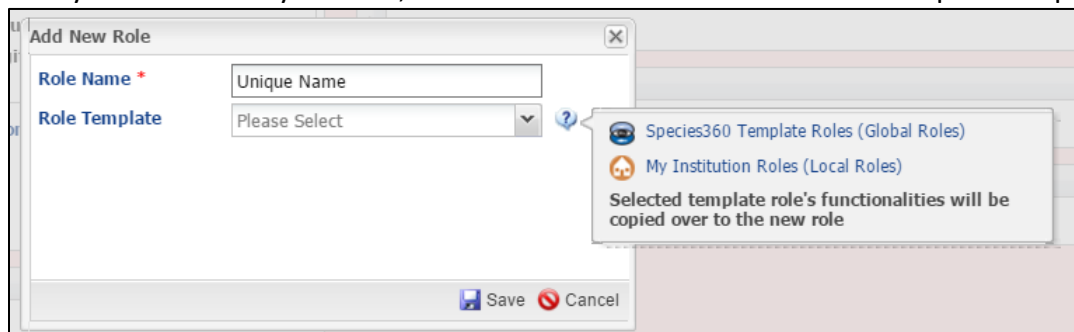
Creating Custom Roles

[Contact Species360 Support](#)

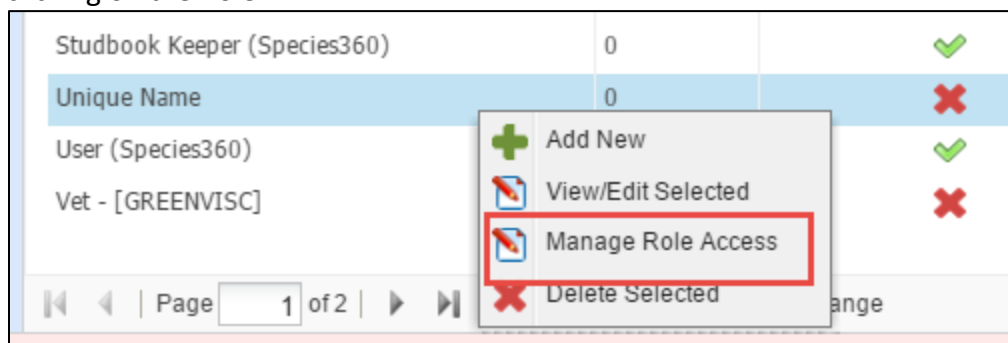
If the Species360 Template Roles do not meet your needs, you can create custom Roles with the access that you need for your staff. It is important to note that when new ZIMS functionality is deployed these custom Roles will not be automatically updated as the Species360 Template Roles are, you will need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

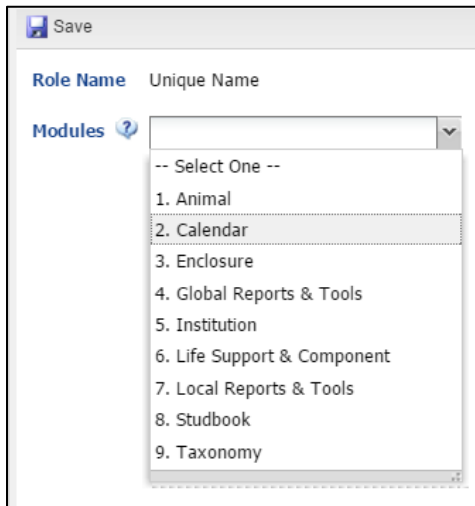


To create the Role access, select Manage Role Access from either the Actions menu or by right clicking on the Role.

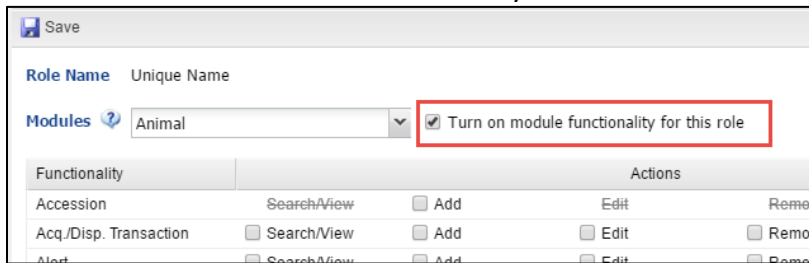


Select the appropriate module from the dropdown list.

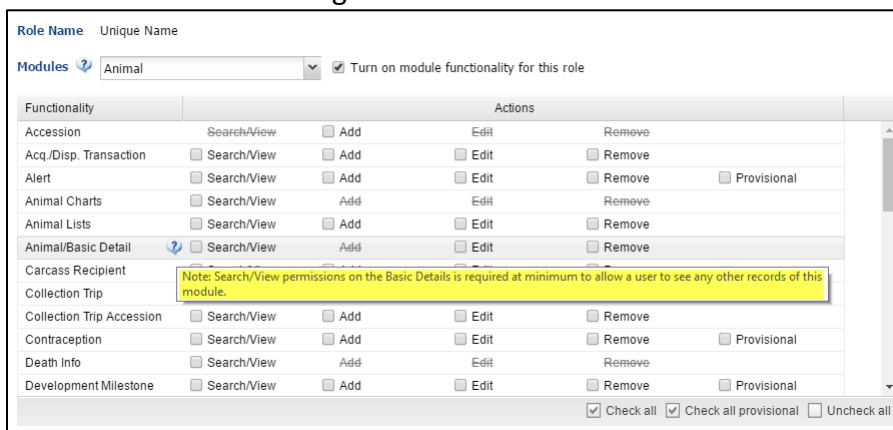
It is the mission of Species360 to facilitate international collaboration in the collection and sharing of information on animals and their environments for zoos, aquariums and related organizations.



Check the Turn on Module Functionality for This Role checkbox.



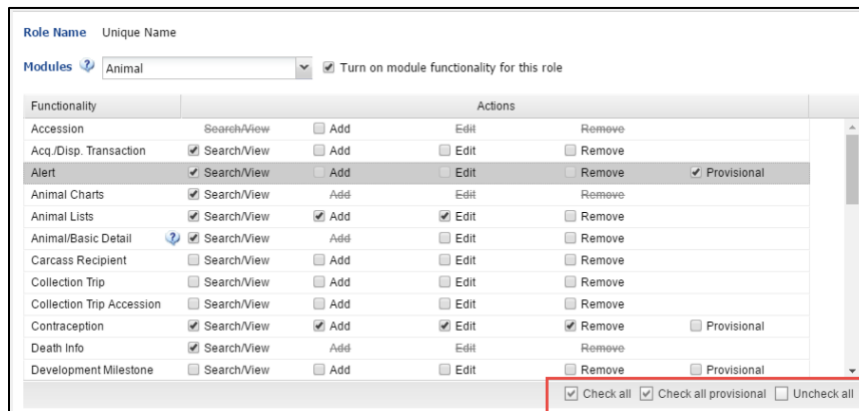
We did not select a template for this Role so no functionality has been checked. If you had selected a template to use (either a Species360 template or another custom Role you already created) that functionality would be copied into this new Role and you can edit as desired. Note that in the Animal module 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.



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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.



Functionality	Search/View	Add	Edit	Remove	Provisional
Accession	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acq./Disp. Transaction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Animal Charts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Animal Lists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Animal/Basic Detail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carcass Recipient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collection Trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collection Trip Accession	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contraception	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Death Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Milestone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>






Check all
 Check all provisional
 Uncheck all

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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