



Advanced Access Management Simplified

Enhanced ZIMS Access Control for Animals (by Taxonomy or Individuals) and Enclosures.

Contact Species360 Support

Advanced Access Management (AAM) allows you to restrict User access to specified Animals, Taxonomies and Enclosures. This feature must first be enabled for your institution by Species360 Global Administrators. To request that this feature be enabled for your institution you should <u>contact Species360 Support</u>. But first, you must understand the effect that AAM will have on your ZIMS Users. This is a comprehensive access control system that can provide added difficulty to your daily workflow if it is enabled and deployed incorrectly.

Species360 Support is able to assist you with the basic aspects of enabling this feature- but due to the comprehensive nature of correctly deploying the AAM feature, intensive support is available via <u>Consultative Training- which may include an</u> added charge, depending on the assessment of your institutional needs.

Once AAM is turned on by the Species360 Administrator, your Local Admin will then need to activate the functionality. To activate go to Start > Institution > Institution Preferences > ZIMS Accessibility & Features.

Below, AAM has not yet been turned on for your facility by the Species360 Administrator.

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ZIMS Accessibility and Features		
🖨 Back 🛛 🚽 Save & Apply For All Users		
Advanced Access Management Features		
Accessibility For External Sharing	On	Off
Provisional Data Entry	On	Off
Display medical weights in animal husbandry record	On	Off

Below, AAM has been turned on by the Species360 Administrator but has not yet been activated by your Local Admin:

	🔅 Institution Preferences			
	ZIMS Accessibility and Features			
	🖕 Back 🛛 🛃 Save & Apply For All Users 🖓			
	Advanced Access Management Features			
	Advanced Access Management For Animals	🔘 On	Off	
	Auto assign rights for incomplete accessions to departments?	🔘 On	Off	
	Maintain assigned rights for animals following full accession of an incomplete accession?	🔘 On	Off	
	Auto assign rights to Read Only upon disposition of animal?	On	Off	
n	Advanced Access Management For Enclosures	🔘 On	Off	

Below, AAM has been activated by your Local Admin for Animals. Note that the three topics under Animals are not activated until Access Management for Animals is turned on. Hover over the "?" for a description of those functionalities. It has not been activated for Enclosures.

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NOTE: Once AAM is enabled, when you run reports, not only does ZIMS have to apply all your filter criteria selected for the report, ZIMS also has to check every entity to see if you are allowed to see it. This means reports will run slower, in some cases noticeably slower, if you use AAM.

The only reports where AAM will apply filters are: Activity Report, Note Retrieval, Specimen, Taxon and Daily Reports. All other reports will not enforce AAM rules – you can limit access to these other reports by disabling them from the role for staff where data limitations should be enforced.

Once you have enabled AAM, to use it you assign access via your Departments (<u>Departments</u>). This means that everyone you want to give AAM access to must be recorded as a Department member. In addition your staff will need to have ZIMS Roles (<u>ZIMS Users with their current appropriate Roles</u>)

To assign AAM access, open your Department grid within My Institution. Highlight the appropriate Department and select "Manage Department Scope" for the desired

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entity (Animal or Enclosure)". Because only Animals was turned on, only Animal is available below. Then select Add New.

Departments								
⊿ 🍣 🕮 - 了 -	Search Clear Filter	🔊 Actions 🗸						
Name	Head	Obsolete						
Carnivores		×						
Admin + Add New		X						
View/Edit Selected								
Manage Department Sco	ope For Animal 20 Change	1 - 2 of 2						
Mark Selected Obsolete								
Teams								

For Animals you can assign access by entire Taxonomies or by individual Animals. NOTE: We are recommending assigning Primary Access as Secondary and Read-only Access is going away soon. Primary Access grants all access permitted by the individual's ZIMS Role.

Manage Carnivores Depa	Add New Item	×
💠 Add New 💢 Delete	🖲 Taxonomy i Animal	
Taxonomy	Search for Taxonomy	<u>م</u>
	Access Role ②	
•	Secondary Access	
	Returning Access	
	🚽 Save 🔇	Cancel

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NOTE: If AAM is turned on and rights are not set, global access rights will be provided by default.

Below we assigned access to all Carnivores and a single animal that was outside that taxonomy.

Ianage Carnivores Department Scope For Animal >							
🖶 Add New 💥 Delete Selected 🎇 🔤							
Taxonomy	Animal	Count	Role				
Carnivora/Carnivores	All Animals under this taxonomy		Primary Access				
	B11006/Aratinga solstitialis/Su		Primary Access				
			Sava 🔊	Canaal			
			Save 🚫 C	Jancel			

You can also assign rights to Departments from within an Animal record using the Privacy & Accessibility for Departments grid.



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			Add Department		
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<- Click here for de	etails 😽		Role	Select One	
				1. Carnivores	
ontraception			•	2. Primates	
<- Click have for d	ataile			3. Admin	
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iclosures				7	
<- Click here for de	etails				
ivacy & Accessibili	ty For Departments				
	cy for Departments				
			A	ctions *	
Department	Role	Taxonomy	Animal		
Carnivores	Primary Access	Carnivores / Carnivora	-		
Admin	Primary Access	Animals / Animalia	-		
Prev Page 1	of 1 Next Page 9	Size 20 Change			

It is highly recommended that Local Admins assign access to Animalia for their

Department	
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Dep	partments				
⊿	2 🖅 🗍 T 🛛	Search C	lear Filter		Action
	Name	Head			Obsolete
	Carnivores 🔓				×
	Admin	Adrienne Miller			×
Man	Add ew X Delete Selected	Page Size	20 Change		1-20 X
Та	axonc Anin	nal	Count	Role	
A	nimals / Animalia			Primary Acces	s

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We activated AAM for Enclosures so access to them can now be assigned. NOTE: Assignment by Enclosure means there is access to the Enclosure record, not access to the animals in that Enclosure.

De	Departments						
⊿	2 🙉 • 🔹 • 🛛	Search Clear Filter	🔊 Actions 🗸				
	Name	Name Head					
	Carnivores		×				
	Admin	Add New View/Edit Selected	×				
	A Page 1	Manage Department Scope For Animal	1 - 2 of 2				
Teams		Nanage Department Scope For Enclosure					
		X Mark Selected Obsolete					

You can assign multiple Enclosures at a time by using the Lookup and checking all that apply. By default, access to all sub-enclosures under the selected Enclosure will be given. Enclosures cannot be assigned from within the record.

				Carnivores	-		
	Add Ne	w Item		×	3		
	Enclos	ure 😲					
	Africa	X Amur Leo	pard 🗙	0			
	Acces	s Role 2					
	sca						
	• Pri	mary Access					
Continent North	ARIII						×
							<u> </u>
Name	Identifier	Category	Туре	Parent Enc	Responsibl	Location	
A New Enc		Terrestrial	Exhibit	GREENVISC			^
AAT		Aquatic	Aquarium	AQ1			
Africa		Terrestrial	Exhibit	GREENVISC			
Aldabran T		Terrestrial	Exhibit	Africa			
Alligator		Terrestrial	Exhibit	Reptiles			
Amur Leop		Terrestrial	Exhibit	Asia			
AQ1		Aquatic	Aquarium	Aquarium			
Aquarium		Aquatic	Building	GREENVISC			
Asia		Terrestrial	Exhibit	GREENVISC			
Aviary		Terrestrial	Exhibit	South Ame			
Bird		Terrestrial	Exhibit	Education			
Chickens/		Terrestrial	Exhibit	Farm Yard			
Clinic		Terrestrial	Exhibit	GREENVISC			
Coati		Terrestrial	Exhibit	South Ame			
Education		Terrestrial	Exhibit	GREENVISC			

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As for Animals, it is highly recommended that Local Admin Departments be assigned the top level Enclosure.

By default, any Incomplete Accession (IA) created by a User with specified AAM rights will be assigned to all members of the Department of the IA creator.

Revised 25 September 2020