# Multiple Institution Access

Managing Users and access when multiple institution access is enabled in ZIMS.

Contact Species360 Support

If your institution is in a legal "sibling" relationship with another (e.g. two or more institutions operating under the legal umbrella of a parent organization), you may wish to allow users to switch between institutions quickly without having to log out and log back in again. Multiple institution relationship functionality must be set up by Species360 support. The Parent Institution will have a Category of "Other" and a Type of "Parent/Management Organization". Do NOT put animals into this Parent Institution. Once set up, your Local Admin will need to assign the Users rights to the sibling institutions.
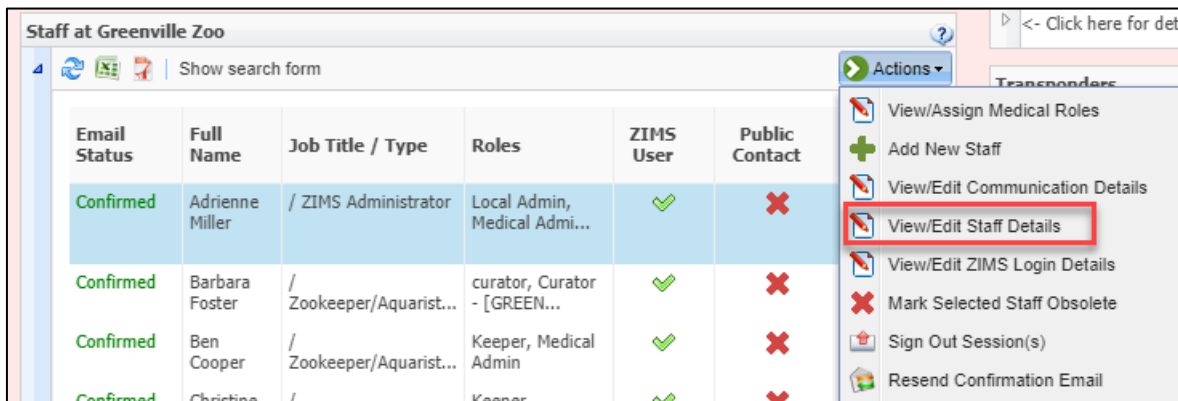
To create Users in multiple institutions, make sure you are in the PARENT institution. All Users should be created there, otherwise, they will NOT have the ability to switch between institutions. It is wise to create all Users under the Parent institution, even if you do not expect to allow them to switch. You can still restrict a User to just a single institution and if recorded here you can easily assign them to multiple institutions should the need arise.

In our scenario, Greenville Zoo is the Parent institution and Little Greenville and Middle Greenville are child institutions of it.
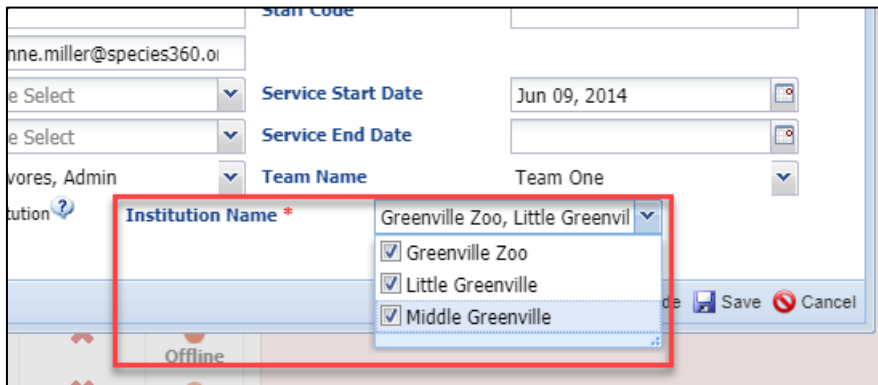
From the Start menu, confirm that you are in the Parent institution.

From the Staff grid, select the desired Staff person > Actions > View/Edit Staff Details.



From the Edit screen, select the desired institutions from the dropdown for Institution Name.

You will now see that the Staff member is listed three times in the Staff grid. Once for the Parent institution (note no mnemonic is displayed) and once for each child institution (LGREENVI and MGREENVI).
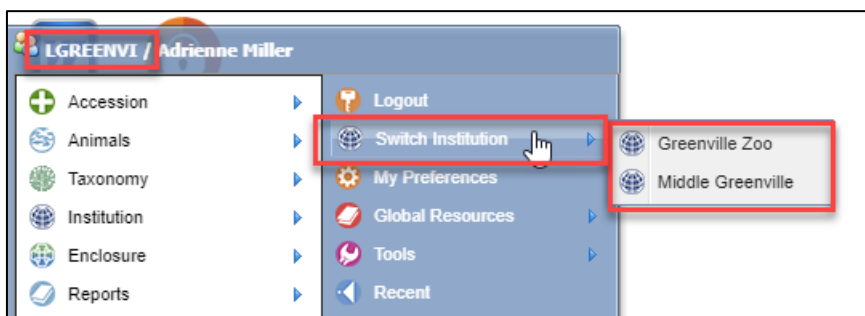


If you want them to have ZIMS access for those institutions, you will need to assign them a ZIMS Role for each. Select the appropriate Staff/Institution combination > Actions > View/Edit ZIMS Login Details. Their email and User Name will prefill and you can assign the desired Role(s). For more information on assigning Roles see Assigning Roles.

The grid now displays the assignments. Once the Staff member has confirmed their email for the Parent institution, it will be confirmed for all Child institutions too. This is another reason why adding Staff at the Parent institution level is recommended. To assign other Staff members Roles at other institution, repeat the process.

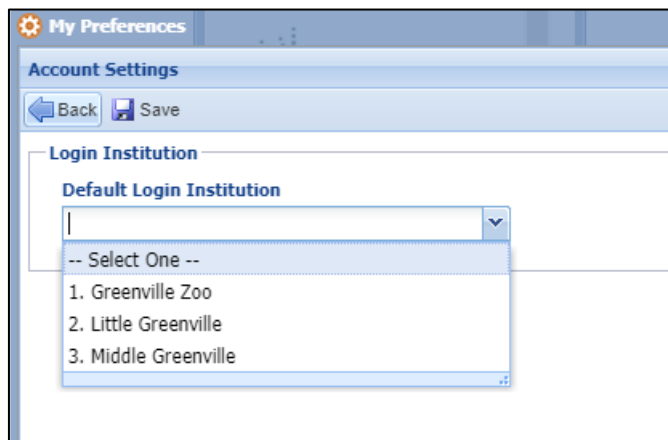When you add new Staff members, institution assignment can be done directly from the Add New Staff screen.

When you log in, click on Start to confirm which institution you are currently working. To switch to your other institution(s), click Start, then Switch Institution and select.



You can change your default institution - for example, if you always wanted to log in as the Parent institution, go to My Preferences > Account Settings > Change Default Institution.

From there, you can choose your default institution from the dropdown, and then click Save:



Now that will be your default institution when you open ZIMS, but you can switch to others from Start > Switch Institutions.

*Revised 31 October 2019*