

## ZIMS Preferences

Making ZIMS display and function as you want it to.

Contact [support@Species360.org](mailto:support@Species360.org)

There are many options in ZIMS to make the application work how you want it to. Some of these will default information in data entry fields to save you time and others affect the way ZIMS displays data. Take the time to make ZIMS function your way.

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Preferences allows customization of certain defaults and functions. The defaults save data entry time by prefilling fields with the data most often used or formats that are preferred. These defaults remain editable at the time of data entry. Institution Preferences are usually set by your Local Admin, and impact everyone at your institution. My preferences allow individual users to override certain preferences. Not all Institution Preferences are available at the User level. A full list of preferences, and whether they are available in Institution or My Preferences can be found [here](#).

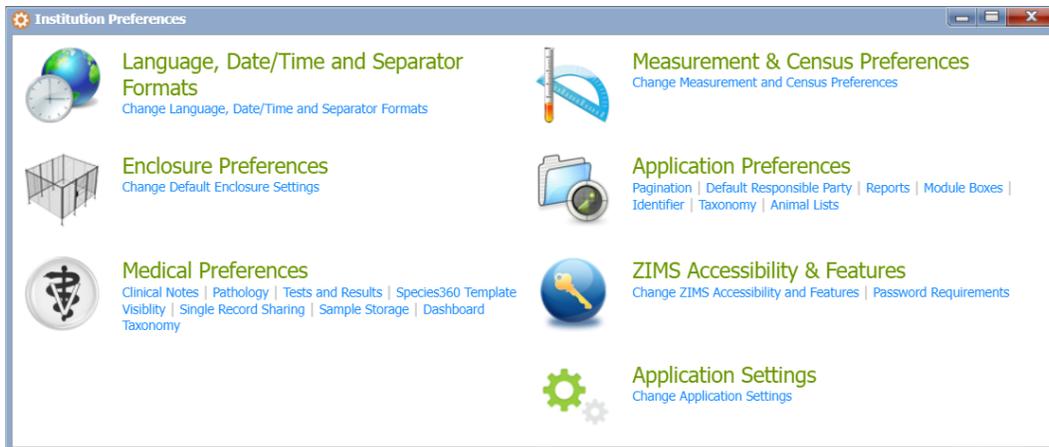
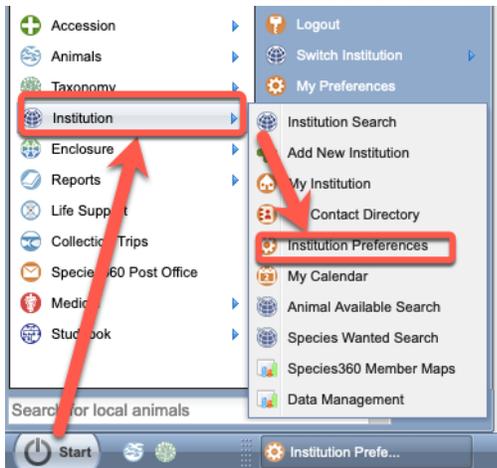
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## Institution Preferences

Institution Preferences allows customization of certain defaults and functions which can be applied to all users. These defaults remain editable at the time of data entry. Institution Preferences are usually set by your Local Admin. A full list of preferences, and whether they are available in Institution or My Preferences can be found [here](#).

Institution Preferences are found under Start > Institution > Institution Preferences.



Institution Preferences have two types of Save:

- Save - Preference will apply to all current Users (unless they have set different My Preferences) and all new Users

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- Save & Apply for All Users – Preference will apply to all current and new Users. It will overwrite any User preferences set in My Preferences. HINT: Be very careful when selecting this type of Save!

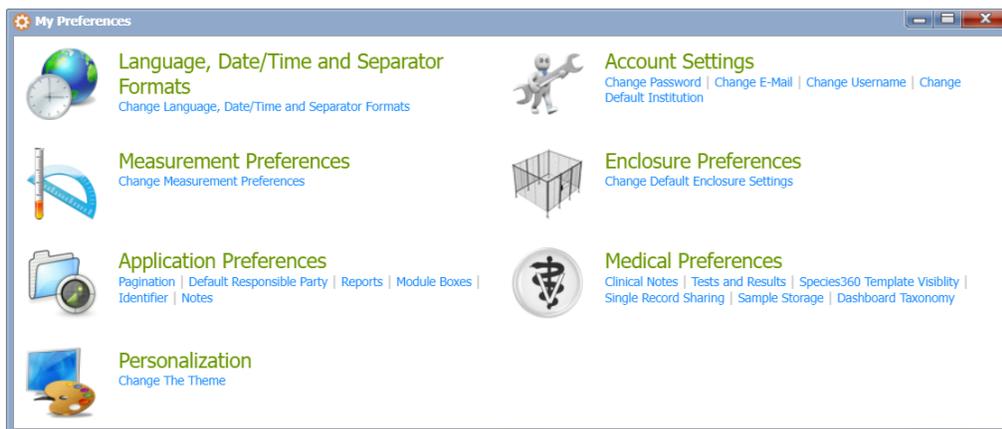
In addition to the preferences menu above, you can also set [Measurement Preferences](#) within the Institution Module.

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## My Preferences

My Preferences allow customization of certain defaults and functions for the logged in user. These defaults remain editable at the time of data entry. A full list of preferences, and whether they are available in Institution or My Preferences can be found [here](#).

My Preferences are found under Start > My Preferences.



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## Preferences Scope

Below is a list of all preferences available in ZIMS, and whether they are available in Institution Preferences and/or My Preferences.

		<b>Institution Preferences</b>	<b>My Preferences</b>
<a href="#">Language, Date/Time and Separator Formats</a>	Language, Date/Time and Separator Formats	Y	Y
<a href="#">Enclosure Preferences</a>	Change Default Enclosure Settings	Y	Y
<a href="#">Medical Preferences</a>	Clinical Notes	Y	Y
	Pathology	Y	Not available
	Tests and Results	Y	Y
	Species360 Template Visibility	Y	Y
	Single Record Sharing	Y	Y
	Sample Storage	Y	Y
	Dashboard Taxonomy	Y	Y
<a href="#">Measurement &amp; Census Preferences</a>	Change Measurement Preferences	Y	Y
	Change Census Preferences	Y	Not available
<a href="#">Application Preferences</a>	Pagination	Y	Y
	Default Responsible Party	Y	Y
	Reports	Y	Y
	Module Boxes	Y	Y
	Identifier	Y	Y
	Taxonomy	Y	Not available
	Animal Lists	Y	Not available
	Notes	Not available	Y
<a href="#">ZIMS Accessibility &amp; Features</a>	Change ZIMS Accessibility and Features	Y	Not available
<a href="#">Application Settings</a>	Change Application Settings	Y	Not available
<a href="#">Personalization</a>	Change the Theme	Not available	Y
<a href="#">Account Settings</a>	Change Password	Not available	Y
	Change Email	Not available	Y
	Change Username	Not available	Y
	Change Default Institution (for child institutions)	Not available	Y

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### [Language, Date/Time and Separator Formats](#)

**Language** – ZIMS is available in English, Spanish, Russian and Japanese. If a language other than English is selected, remember to check the Support Extended Character Set checkbox.

#### **Date and Time Formats**

- **Date View Format** - how dates are viewed on screens and reports
- **Date Edit Format** - how dates are recorded during data entry
- **Time Format** - 12-hour day (with AM and PM) or 24-hour day

#### **Separator Formats**

- **Decimal Separator** - what symbol indicates a decimal
- **Thousand Separator** - what symbol indicates a thousand number

**Currency** - International currency, used when a price is indicated

**Time Zone** - helps time stamp when data was entered or edited. Times are important in data entry fields when more than one action occurs on the same day within a record

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### [Enclosure Preferences](#)

**Enclosure Category** – The default category for new enclosures, choose either terrestrial (land) or aquatic (water)

**Enclosure Type** – The default type for new enclosures. This list is filtered by what is selected for Enclosure Category

**Allow Multiple Enclosure Assignments** (*Institutional Preferences only*) - if this is checked then animals/groups can be placed in more than one enclosure at a time. If this is allowed the move out date will not be automatically calculated and must be manually entered. This is NOT available as a My Preference for individual Users.

**Default Enclosure** – Default enclosure when entering data (e.g. accessioning). Sourced from your Enclosure Tree

**Default Collection** – Default collection when accessioning new animals. Sourced from your Collection List

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### [Medical Module Preferences](#)

#### **Clinical Notes**

- **Default Clinical Note Entry** - choose your clinical notes to display either **SOAP** or **Notes/Examination/Report Entry**. This can be changed at time of data entry
- **Open Animal Care Summary** – check this box if you want the Animal Care Staff Medical Summary box open by default

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**Pathology (Institutional Preferences only)** - This is NOT available as a My Preference for individual Users

- **Staff for Pathology Submission Alert** –select who you want alerted with a Calendar task once a Necropsy has been submitted
- **Enable Auto-incrementing Pathology Case Number** – check this if you use Case Numbers and would like them assigned automatically
- **Default Gross/Examination Location** – choose either an External Lab or an enclosure within My Institution to set as your default location
- **Default Histopathology Location** – choose either an External Lab or an enclosure within My Institution

#### Tests and Results

- **Default System for Test Units (Institutional Preferences only)** – select which units (Standard International (SI) or Conventional US units) to display by default. This is NOT available as a My Preference for individual Users
- **Default Laboratory** – choose either an External Lab or an enclosure within My Institution to set as your default laboratory

#### Species360 Template Visibility

- **Species360 maintained template visibility** - Select if you want to see Species360 maintained Test Panels and Favorite Samples

#### Single Record Sharing

- **Single Record Sharing Preferences** - Enter a default biobank institution for sharing Samples with (currently this functionality is for EAZA member institutions only)

#### Sample Storage

- **Disable Default for Most Recently Used Location** – allows you to disable the auto-fill for the next available Sample Storage location (e.g. using the next available grid space in a gridded box).

#### Taxonomy Dashboard

- **Taxonomy used for dashboard medical record list** – allows you to set the default taxonomy used for the medical dashboard, either Common Name or Scientific Name

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### Measurement and Census Preferences

#### Measurement Preferences

- **Unit of Length** - will be default length unit for both animal and enclosure measurements
- **Unit of Weight** - will be default weight unit for animal weights
- **Unit for Area** – default area unit used for enclosure dimension measurements

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- **Unit for Volume** - default volume unit used for enclosures, life supports and components
- **Unit for Temperature** - default temperature unit used for enclosure, life support and component measurements
- **Show Measurement Tips** - activates a box when recording measurements that displays your preference selection

#### **Census Preferences** (*Institutional Preferences only*)

- **Default Colony Inventory Count** - the count reflected in inventory report if a group is indicated as a colony. This can be edited within each Colony record. This is NOT available as a My Preference for individual Users.
- **Default Tracking** - how new groups will be tracked. No Tracking (census count only), by Life Stage, by Sex Type or by both. This is NOT available as a My Preference for individual Users

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#### **Application Preferences**

**Pagination Size** - the number of lines displayed in a results grid

#### **Default Responsible Party**

- **Use logged in User as Default** - whoever is logged in will be prefilled in the Responsible Party field
- **Responsible Party** - select another person as default, sources from Staff list

#### **Reports**

- **Default page size for Printers and PDFs** - A4 or Letter

**Module Boxes** - if Open as Default is checked for a module, all the grids in the module will be expanded when a record is opened

#### **Identifier** - Options to show identifiers:

- Show only my institution's identifiers for local animals in animal search results
- Show only my institution's identifiers for local animals on reports
- Include only active identifiers in animal search results
- Include only active identifiers for reports
- Include preferred ID on animal tab

#### **Taxonomy** (*Institutional Preferences only*)

- **Enable auto-accept for Species360 taxonomic changes** - You can decide if your organization will automatically accept new global taxonomic changes by default. If you enable this feature, you will still be notified by Post Office message when changes occur that impact your collection, additionally, you can review these auto-accepted changes in the Pending Taxonomic Changes tab. This is NOT available as a My Preference for individual Users

#### **Animal Lists** (*Institutional Preferences only*)

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- **Enable auto-update of Animal Lists upon disposition** - keep your Animal Lists updated with only current animals. If an animal dies or is dispositioned it will automatically be removed from the list. If you have a dead or dispositioned animal in the Animal List when you check this ZIMS will NOT automatically remove the animal. You will still need to remember to add new animals to the lists as appropriate

#### Notes (My Preferences only)

- **Notes Preferences** - choose to hide specific Note Types/Sub-types or all notes from other grids from the Notes and Observations tab in an animal record. Users can override this preference on an animal record to view the notes from other grids during that session (preferences will return to the default on the next log in)  
*Note: You can override this feature in the Notes & Observations tab for a specific record. Any changes to the preference on the Notes & Observations tab will be reset once the record has been closed or the user logs out.*

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#### ZIMS Accessibility & Features (Institutional Preferences only)

These Preferences are available as Institution Preferences only. They are NOT available as My Preferences for individual Users.

#### Change ZIMS Accessibility and Features

- **Advanced Access Management Features** - your Local Admin will need to turn these on for your institution. If you do not see a feature that you want to use, contact [support@Species360.org](mailto:support@Species360.org) to have the Global Admin activate it at your institution.
  - **Advanced Access Management for Animals** - this feature allows you to limit ZIMS access to what animals are assigned to a Department
    - **Auto assign rights for Incomplete Accessions to Departments**
    - **Maintain assigned rights for animals following full accession of an Incomplete Accession**
    - **Auto assign rights to Read Only upon disposition of animal**
  - **Advanced Access Management for Enclosures** - this feature allows you to limit ZIMS access to what enclosures are assigned to a Department
  - **Advanced Access Management for Life Support and Components** - this feature allows you to limit ZIMS access to what life supports and components are assigned to a Department
  - **Accessibility for External Sharing** - allows you to share your animal records with another institution
  - **Provisional Data Entry** - allows for data entry that does not become a part of the ZIMS record until it is approved by the appropriate Staff person. Often this is the Local Admin or Registrar

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- **Display medical weights in animal Husbandry record** – turn this off if you do not want to see weights recorded in the Medical module display in the Husbandry weight grid
- **Medical Records Sharing** – select the level of shared that you want for your medical records. Remember, medical records are shared at the lowest common denominator of the institutions involved. If you share at the Gold Level but the facility you are sharing with shares at the Bronze Level, they will only see those records at that Bronze level.
  - Gold level – all medical records except Clinical Notes marked as private will be shared
  - Silver Level – Anesthesia, Physiological Measurements, Medical Issues/diagnosis, Treatments, Health Status and Pathology (Necropsy/Biopsy) will be shared
  - Bronze Level – Anesthesia, Physiological Measurements, Pathology (Necropsy/Biopsy) will be shared
  - No Sharing – no medical records will be shared
- **Optional ZIMS Modules**
  - **Care and Welfare** – activates the Care and Welfare module
- **Session Settings**
  - **Force Single Session** - a User can be logged in on only one computer at a time
- **Limit Access by IP Address** - ZIMS can be accessed only from specific IP addresses recorded in the grid. Be very careful with this as you may lock yourself out of your IP address changes. We recommend this limitation is access at the individual Staff level.

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### Application Settings (Institutional Preferences only)

**Change Application Settings** These Preferences are available as Institution Preferences only. They are NOT available as My Preferences for individual Users.

- **Allow Re-use of Transponders** – you cannot record a transponder that was already used in an animal into a new animal unless this box is checked
- **Enable Auto-incrementing Local ID** – the next Local ID available will be automatically assigned during the accessioning process
- **Current Local ID Settings** – indicates the last Local ID used. Also allows you to **Provide New Local ID Settings** to start a new sequence of Local IDs and to add a Local ID Prefix
- **Display Care & Welfare Notes in Husbandry Record** – allows users to view Care and Welfare Notes in the Husbandry Record. If you have this selected, your Care and

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Welfare Notes will also be shared when you share your animal record with other institutions

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### Personalization

**Change the Theme** – select blue or gray for the module borders

### Account Settings (My Preferences only)

**Change Password** – where you would go to reset your password

**Change E-Mail** – where you would go to change your E-mail address

**Change Username** – where you would go to change your Username

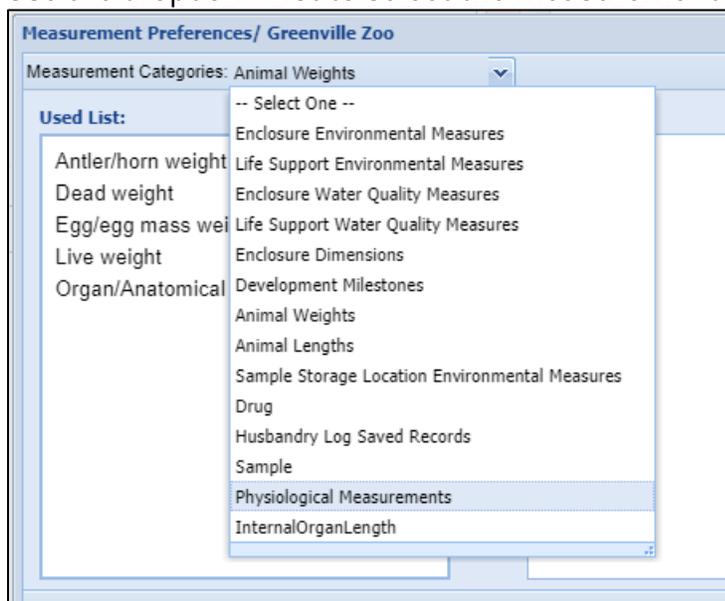
**Change Default Institution** – choose which institution to log in to by default. This only applies to institutions that operate under the umbrella of a Parent organization and Users have access to multiple institutions without logging out

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### Measurement Preferences

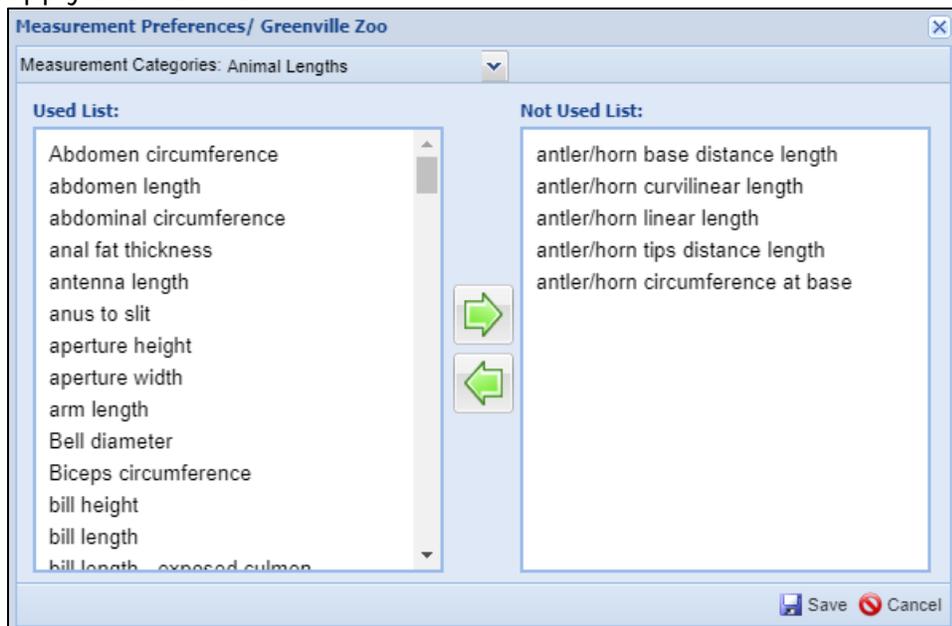
Measurement Preferences allow measurement lists to be customized with the terms your institution uses and remove those you do not, thus saving data entry time. It is found as a tab at the top of My Institutions > Details > Measurement Preferences.

Use the dropdown list to select the measurement type.



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In our example below our institution is an Aviary and will only be recording lengths for measurements related to birds. We have opened Animal Lengths and have moved all measurements relating to antler/horn length to the right side Not Used List. We will continue on until the only measurements that will display when Animal Length is recorded are relevant terms, making data entry much easier and quicker. Measurement Preferences apply to all Users.



For a Help document on this topic see [Measurement Preferences](#)

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## Column Customization

### Husbandry Columns

All results grids can be customized to display only the columns that you want to see and in the order that you want to see them. Find out more in this [column customization help document](#).

### Medical Columns

Your Medical Dashboard can be customized to display only the columns that you want to see and in the order that you want to see them. Find out more about column customization in ZIMS for Medical in this [help document](#).

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### [Studbook Columns](#)

Find out how to customize your columns in the [Column Customization ZIMS help document](#), and [column customization video](#).

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