ZIM ZYLIN Incident Management

Custom Data Fields in ZIM

Historically, the norm for most databases has been a rigid structure where the format used to store data is defined by the programmers. Advancement in servers and hardware technology now ensure that other, more flexible, data models can be used when storing data. Flexible storage ensures that you no longer need to wait for updates in the program or database-server when changes are needed. New fields can be added, and old fields retired without even stopping program use, or taking database-servers offline.

Based on flexible storage, the Zylin Incident Manager (ZIM) can customize data-fields at run-time. These *Custom Fields* are used in ZIM to define standard fields, but also allow users to define new fields when they are needed.

Only a user defined as *Superuser* can add new fields, so you can internally maintain the structure of your data fields. Custom fields can be for four types, date, user-select, text, or drop-down type with single or multi-level selections. The *Superuser* also defines where and how the custom field is used.

The use of custom data fields ensures that effective, inclusive cases can be created from day one. If registering cases require more or less information, this can be changed dynamically, and the new format will be used for all future cases.

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Using Custom Fields

The possibility of adding or making a field inactive is a powerful tool, but it is also important to place and display it in a way that makes it easy to use. That way several options can be used to format how and where the field is placed. Managing options are done in the function **User Defined Fields**.

Custom Fields List

Under **ZIM Adaptation** in the menu, there is an option called **User Defined Fields** that shows all custom fields. Several definitions will be fixed because they are standard fields. Only **Active** toggle and **Configuration** can be changed in system-fields definitions.

Name	When the field is used
Type	Shows what is selected (date, user, text, or multi-select.)
For Use In	Describes where input for the field is placed in the program.
Active	Toggles for active/inactive status
Delete	If no information is stored, the definition can be deleted.
Select Sets	Select which level in which the drop-down starts
Edit Select Sets	Start the edit-function for drop-down list.
Config Changes	A list of options and values selected for the custom field.

Managing Custom Fields

As *Superuser*, these two selections in the Main Menu are used to add and configure custom data fields, **Add Custom Field** is used to create and configure fields, **Add Field Select Set** is used to configure lists used in select fields.

Add Custom Field
Add Field Select Set

Select **Add Custom Field** to display the **User Defined Custom Fields** page:

User Defined Custom Fields

Save

Select Type: Contact **Select Use In:** Case

Add Field   Delete Marked

Show Fields by Use In: [   ] Update

Name	Type	For Use In	Active	Del	Select Sets	Edit Select Sets	Configuration Changes
Importance	Select	Case	☑		Importance	Select Sets	report=true filter=true
Entrepreneur	Select	Case	☑		Entrepreneur	Select Sets	report=true inhouse=true
Entrepreneur	Select	Contact	☑		Entrepreneur	Select Sets	report=true copytocase=entrepreneur

In this example two fields are used when registering a case, and the last field is used in Contacts. The *Entrepreneur* (Contact) is linked to *Entrepreneur* (Case), and the option `copytocase=entrepreneur` configures automatic transfer of information from the Contact to the Case when a new case is added.

Before a new select-set can be added, the list must have at least one entry. Several custom fields can use the same list. If a multi-level list is used, field can be set to start in a lower level set.

For example, if a list *Names* is defined with sub-levels *Company* and *Customer*, each of the sub-levels can be connected to a separate custom field. The drop-down will then only show information from the selected level and lower.

In **Configuration Changes**, options can be defined that will change default setting and add functions. Most functions are switches (boolean.)

Custom Field Options

ZIM includes custom data fields options, which can be set under **Configuration Changes**. The format used is: Option = Value. For example, rows = 40 means the textfield will be 40 characters wide. For boolean options, the value is either true or false. The default value of boolean options is false. The option *copytocase* copies this value from the Contact to this field in the case upon case-creation.

Option	Value	Description
rows	number	Rows used in the text-field
cols	number	Columns used in the text-field
filter	boolean	This field can be used in filters.
showfulllist	boolean	Drop-down information will be pre-loaded as the default.
report	boolean	The field can be selected in reports.
systemfield	boolean	The field is part of default configuration. Users cannot change the value.
search	boolean	This field can be used in search selections.
order	number	Is used to sort the custom fields in entry pages.
required	boolean	The field must have a value before the case can be saved.
inhouse	boolean	External users are not to see this field. This is false by default.
caselist	boolean	This field appears in the case-list.
copytocase	label	Copies a default value from user-info to case. The *id* command is used to set a label for the field in the user-info label. It can be any string with regular letters.
id	label	Sets label for user-info field used in *copytocase*.

The custom field options above are the most common and useful options. If you encounter other options (typically automatically generated by the ZIM application), and have any questions, contact Zylin for more information.

Select **Add Field Select Set** to display the **User Defined Field Select Sets** page.

User Defined Field Select Sets

[Save]

Level: Top Level – All Sets

[New] [Delete Marked]

Records: 1-16 (16 records found)

[Show All Records] [First] [Previous] [Next] [Last] **Per Page:** 40

Cases	Name	Active	Delete	Select Set
	Entrepreneur	☑		[Select Set]
	Importance	☑		[Select Set]
	Contacts	☑		[Select Set]
	Contacts	☑		[Select Set]

The first level defines the list. Click the **Select Set** button for *Importance*. The page will open to add selection information. Each entry can have sub-levels. To show all levels, check the **Show Children** checkbox then click **Update**. This will display all levels.

Level: Importance

[Up One Level] [New] [Delete Marked]

Show children ☐ [Update]

Records: 1-6 (6 records found)

[Show All Records] [First] [Previous] [Next] [Last] **Per Page:** 40

Cases	Name	Active	Delete	Select Set
📁	1 Less important	☑		[Select Set]
📁	2	☑		[Select Set]
📁	3	☑		[Select Set]
📁	4	☑		[Select Set]
📁	5	☑		[Select Set]
📁	6 Most important	☑		[Select Set]