Zylin Incident Manager
Brief Manager Manual

ZIM

ZYLIN
Incident
Management

How to Contact Zylin Inc.

Font Conventions

This manual uses the following highlighting conventions:

- Bold Arial indicates buttons and graphical user interface controls, such as the names of menus and fields, the text found within the fields, or drop-down box entries and selections. Example: **Apply**

- Italics indicate book titles and emphasized words. Example: *Book Title*

- Courier New font indicates code samples, commands, file names, directory paths, command prompts, and program output. Example: `config`

- Blue Courier New font indicates complete Internet addresses (URLs). Example:
  `http://www.zylin.com/`

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Introduction

Welcome to Zylin Incident Manager (ZIM). ZIM is an effective tool for registering, managing, and tracking incidents, and for creating incident case cross-tabular (crosstab) reports. ZIM supports three levels of access, User, Manager, and Administrator.

User-level access allows the user to register incidents, assign responsibility, monitor incident cases, and create incident case reports and crosstab reports.

Manager-level access allows the manager to add *Contacts*, create *Contact Lists*, and to define company-specific *Processes*. A *Contact* is any person that can appear in a case. Typically this would be an employee related to the case. However, a *Contact* can be any person, including a private person who is affected by, or related to, a case in any way. A *Contact List* is a named list of *Contacts*. *Contact Lists* are used in the definition of responsibility for a *Process*. *Process* classifies and describes the type and area of work of any given case. The top level *Process* also defines the department or group responsible for the case. Manager-level access also allows the manager to create individualized cost types, define custom information fields, and selection sets. Manager-level access allows the manager to verify contact email addresses, and to send email to *Contacts* and *Contact Lists* from within the application. This manual describes the specific features of Manager-level access. Manager-level access also includes all the features of User-level access. For a description of the User-level features, see *Brief User Manual*.

Administrator-level access allows the administrator to add new login accounts, to modify and delete accounts, and to change login access levels. Administrator-level access is described in a separate manual titled *Brief Admin Manual*.

User Interface

This section describes the key features of the graphic user interface, starting with the main menu. Manager-level access includes all the User-level menu selections, and three additional menu areas: **Organization**, **ZIM Adaptation**, and **Email**. These Manager-level section headings, and Manager-level scenario headings in the next section, are highlighted in Zylin Gold for easy access.

> **NOTE:** It is important to remember that ZIM does not support the browser **Back** button. Please use ZIM's internal navigation controls only.

Main Menu

This section describes the Manager-level features of the main left sidebar menu.

Case Management

The **Case Management** menu area allows you to create a new incident case, to access and change existing cases that you have created, or for which you are responsible, and to search and view all active cases by case number or by selected criteria.

Add New Case
Click this button to create a new incident case. The **Create New Case** screen will be described in the *Create New Case Screen* section.

Draft Cases
Displays cases you have created, or for which you are responsible, with **Status** "Draft." Draft status is not the default and must be set intentionally when the case is created.

Active Cases
Displays cases you have created, or for which you are responsible, with **Status** "Active Open." Active Open status is the default setting.

Responsibility
Displays cases that you have created and not assigned to another *Contact*, or for which you have been assigned responsibility, either individually, or as a member of a *Contact List* associated with a responsible *Process*.

Case Search
Allows you to search for cases by selecting different search criteria. Clicking the **Launch Search** button without selecting any specific criteria displays a list of all cases.

Select Case Number
> Allows you to display an individual case by entering a specific case number.

Case Reports

The **Case Reports** menu area allows you to create and use new case reports templates, and to access and use saved case reports templates to generate cross tabular reports.

Saved Templates
> Allow you to access and use saved report templates, and to view a list of KPI (Key Performance Indicator) target values. The **Saved Case Report Templates (and KPI Targets)** screen is described in *Create a Crosstab Report Global Template* below.

Create Report
> Allows you to create a new incident case report and to save the configuration as a template. The **Create Case Reports** screen will be described in the *Create a Crosstab Report Global Template* section below.

Organization

The **Organization** menu area allows you to add *Contacts*, to create *Contact lists*, to add *Contacts* to *Contact Lists*, and to create and define *Processes*. *Contacts* and *Contact List* functions are only available with Manager-level and Administrator-level access. *Processes* is only available with Manager-level access.

Contacts
> The **Contacts** menu item displays the **Contacts** page, which allows you to view all registered *Contacts*, to search the for specific *Contact Lists* or for specific *Contacts* by name, to add new *Contacts* to the system, and to remove or deactivate existing *Contacts*.

Contact Lists
> The **Contact Lists** menu item displays the **Contact Lists** page, which allows you to add and remove *Contacts* from existing *Contact Lists*, to remove existing *Contact Lists*, and to create new *Contact Lists*.

Processes
> The **Processes** menu item displays the **Processes** page, which allows you to create new top-level *Processes*, and *Sub-processes*, and to remove or deactivate existing *Processes*.

ZIM Adaptation

The **ZIM Adaptation** menu area allows you to add *Cost Types*, *Custom Fields*, and *Custom Field Select Sets*. These functions are only available with Manager-level access.

Add Cost Type
> The **Add Cost Type** menu item displays the **Cost Calculation Types** page, which allows you to review and change existing *Cost Types* and to add and define new *Cost Types*.

Add Custom Field
> The **Add Custom Field** menu item displays the **User Defined Custom Fields** page, which allows you to review and change existing user-defined *Custom Fields*, and to add and define new *Custom Fields*.

Add Field Select Set
> The **Add Field Select Set** menu item displays the **User Defines Field Select Sets** page, which allows you to review and change existing user-defined field *Select Sets*, and to add and define new *Select Sets*.

> **NOTE:** *Select Sets* are used to populate drop-down selection fields used in *Select* type *Custom Fields*.

Email

The **Email** menu area allows you to verify contact email addresses, send email to *Contacts* and to *Contact Lists* from within the ZIM application, and to review email history. These functions are only available with Manager-level access.

Verify Email Address
> The **Verify Email Address** menu item displays the **Verify Contact Email Addresses** page, which allows you send email to verify the address of a new *Contact*, or to re-verify an existing *Contact* address.

Send Email
> The **Send Email** menu item displays the **Send Email** page, which allows you to send email to registered *Contacts*, and to *Contact Lists*, from within the ZIM application.

Email History
> The **Email History** menu item displays the **Email History** page, which allows view all verification and non-verification emails sent from within the ZIM application.

Login Account

The **Login Account** menu area lists the full name associated with your account, followed by the login account name in parentheses.

Account Settings

The **Account Settings** menu item displays the **Account Settings** page, which allows you to change your password, change the email address associated with your login account, change the full name associated with the account, and to see a list of all *Contact Lists* to which you are a member.

Logout

The **Logout** menu item ends your session and logs you out.

Terminology

The **Terminology** menu area displays a link to a glossary of special terms used in the ZIM user interface.

Create New Case Screen

This section describes the features of the **Create New Case** screen. An action-oriented, detailed description, with screenshots, appears in the *Add a New Case* section. This screen has five tabs, **Description**, **Responsibility**, **User Defined Fields**, **Costs**, and **Activities**. The minimum input required to create a new Active Open case is, **Discovery Date**, **Process**, and **Description**.

A new Draft case can be created by selecting Draft in the **Status** drop-down box, then selecting a **Discovery Date** and a **Process**. These requirements can be met by using only the **Description** tab. Red error messages will appear if you attempt to save the case without meeting these minimum requirements.

Saved Case Report Templates Screen

This section describes the **Saved Case Report Templates (and KPI Targets)** screen. A detailed description appears in the *Create a Crosstab Report Global Template*.

This screen displays all saved case report templates. There are two types of saved template, *Global* templates and *User-defined* templates. *Global* templates have been created and saved by users with Manager-level access, and may be seen and used by all ZIM users. *User-defined* templates have been saved by a user and are only available to that individual user. Report templates can include Key Performance Indicator (KPI) target values.

With Manager-level access, you can create and save a user-defined template for your own use, a Global template that can be used by others, and you can select KPI target values for these templates. This screen allows you to create and display a report by clicking on any report name listed in the **Report** column. *Global* report templates and *User-defined* report templates are displayed in two separate tables.

Create Case Reports Screen

This section describes the features of the **Create Case Reports** screen. A detailed description appears in *Create a Crosstab Report Global Template*.

Two drop-down selection fields appear on this screen. The top selection field allows you to choose the type of report you wish to create. The second selection field allows you to select a second type that will be used to create a cross tabulation (crosstab) report. **Process** is the default value in the top selection field. **Status** is the default value in the lower selection field. A crosstab report displays information from all cases that match both criteria in a table. The table format makes it easier to see interrelationships. Crosstab reports are particularly valuable for analyzing costs, and discovering trends.

> **NOTE:** If you are unfamiliar with crosstab reports, we recommend leaving the default types in both selection fields (**Process** and **Status**), and clicking the **OK** button.
> The **Cross-report: Process x Status** screen appears. This screen is described in the next section. The generated crosstab report offers the opportunity to view a crosstab report and to explore the associated interface commands and display settings.

Common Manager Scenarios

This section describes key areas of Manager-level activity, creating *Global* report templates, adding new *Contacts* and *Contact Lists*, creating *Processes*, *Cost Types*, *Custom Fields*, and *Selection Sets*, and verifying email addresses. A manager can also add a new case, or change user settings. Manager-level scenario headings are highlighted in Zylin Gold for easy access.

Add a New Case

In this section, you will create a new case, enter information into the case, change the status of the case, assign responsibility to an individual contact, add a fixed cost, add a corrective action, and schedule an email notification to be sent to the contact who originally reported the incident.

Click the **Add New Case** button in the main menu. The **Create New Case** screen appears, with the **Description** tab open.

Description Tab

The **Description** tab allows you to set the initial status of the case, enter an incident discovery date, set a time limit, select a *Process*, and enter a text description.

1. The default status setting is **Active Open**. For this exercise, select status **Draft**. Usually, *Draft* status is used if the information is incomplete, and the case cannot be completed immediately.

2. Click the **Calendar Icon** next to the **Discovery Date** field, and select a date. This is a required field.

3. Click the **Calendar Icon** next to the **Time Limit** field, and select a date one week later.

4. In the **Processes** drop-down field, select **Accounts / Payroll**. This is a required field.

   NOTE: *Process* classifies and describes the type and area of work of any given case. The top-level *Process* defines the department responsible for the case. *Process* sub-levels are created to give a detailed description of the work involved in the *Process*. In this example, Bob Harboe is creating a case based on a payroll incident. Payroll is the *Process*, and Accounts is the department.

5. Enter a text description of the incident in the **Description** text box. In this example, a regularly scheduled electronic payroll payment was not made. This is a required field.

6. Enter a text description of corrective actions in **Actions for this incident** text box (Not a required field).

7. Enter a text description of corrective measures in **Corrective Measures** text box (Not a required field). *Corrective Measures* are systemic changes taken to avoid repeat occurrences of similar incidents.

8. Click the **Save** button to save your changes.

Create New Case

| Save | Cancel |

| Description | Responsibility | User Defined Fields | Costs | Activities |

Case Number	Date Created	Created by
Assigned Upon Save	10/27/11	Bob Harboe
Status	Discovery Date *	Time Limit
Draft	27 Oct 2011	03 Nov 2011

Processes *

Accounts / Payroll

Description *

Regularly scheduled electronic deposit transfer to my checking account did not occur as expected. I don't know if this happened to any other employee.

Actions for this case

Please check the status of the transfer with the payroll company. Send an internal company email to see if this happened to anyone else.

Corrective Measure

Verify current schedule and transfer settings with the payroll company and the bank.
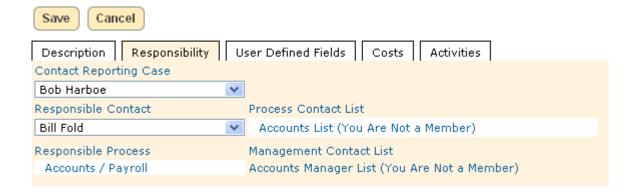
NOTE: In the screenshot above, **Discovery Date ***, **Processes ***, and **Description *** are all followed by asterisks to indicate that they are required fields.

Responsibility Tab

The **Responsibility** tab allows you to assign responsibility for a case to a *Contact*.

1. Select the **Responsibility** tab. By default, the *Contact* who is logged on and is creating the case is listed as the *Contact* reporting the case. In this example, Bob Harboe is entering the case and Bob is also the *Contact* reporting the case, so do not change the reporting *Contact*. In other situations, a system user may enter an incident that has been reported by another *Contact*, and it will be necessary to change the reporting *Contact*.

2. Assign responsibility for this case to Bill Fold, the head of Accounting.

3. Click the **Save** button to save your changes.

Save	Cancel

Description	Responsibility	User Defined Fields	Costs	Activities

Contact Reporting Case

Bob Harboe

Responsible Contact   Process Contact List

Bill Fold   Accounts List (You Are Not a Member)

Responsible Process   Management Contact List

Accounts / Payroll   Accounts Manager List (You Are Not a Member)

User Defined Fields Tab

Select the **User Defined Fields** tab.

Save	Cancel

Description	Responsibility	User Defined Fields	Costs	Activities

Internal Reference #   IR142857

Location   Ventura / Plant Three

User Defined Fields are created by users with Manager-level access at the customer company's direction. Your company may create a set of customized user-defined fields, or may choose to not use this feature. In the example above, the sample company has defied two custom fields, **Internal Reference #**, and **Location**. For this demonstration, **Ventura / Plant Three** has been selected for the location. In this example, the reporting *Contact*, Bob Harboe, works in Ventura at Plant Three.

Costs Tab

The **Costs** tab allows you to add hourly and non-hourly costs to an incident case, and to calculate and track the total cost for the case.

1. Select the **Costs** tab.

2. Select Bill Fold from the **Contact** selection field.

3. Click the **Add Cost** button. In this example, a company standard incident processing "Fixed cost" has been established to be $80.00. This basis amount is added to every new case automatically. In this specific case, the individual company cost for one hour of responsible Contact Bill Fold's time has been added at $60.00 per hour. The result is an initial cost calculation of $140.00 for this incident.

Since this incident will likely be resolved through phone and email communication with the accounting department, with the company's payroll processing company, no additional costs are expected at this time. In addition, a note has been entered in the **Note:** field to document the incident.

NOTE: The automatic addition of "Fixed cost" is a ZIM feature. However, your company may choose not to support the use of *Fixed cost*. Also, all *Cost Types* are customized by and for individual companies. The cost types in your **Costs** Tab selection fields will vary from those found as examples in this document.

4. Click the **Save** button to save your changes.

Activities Tab

The **Activities** tab allows you to add corrective actions, to change the status of the actions, and to monitor the status of the actions. The tab also allows you to create an Activities log, and to send email notifications to *Contacts* and *Contact Lists* connected to the case. The tab is divided into three sections, **Corrective Actions**, **Activity Log**, and **Notifications**. In this example, you will add two corrective actions, and a notification.

1. Select the **Activities** tab.

2. Click the **Add Corrective Actions** button. Enter an action, a responsible *Contact*, and a time limit for the action. Repeat to add more actions as needed. In this example, two actions are shown, both assigned to one *Contact*, and both with the same time limit.

3. Click the **Additional Notification** button. Because the reporting *Contact* also entered the case, you do not need to add a separate notification to the "reporter." Add a notification to the Accounting List, because this case falls within their area of interest and responsibility.

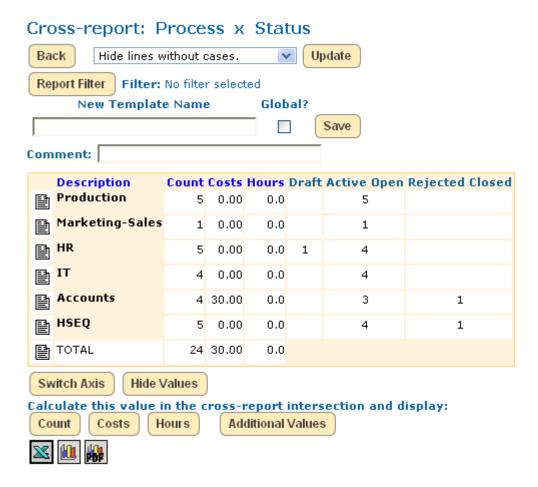**4.** Select Accounting List in the **Subscription Contact List** selection field.

5. Enter a message in the **Message** text box.

This concludes our initial case creation exercise. If this was a real case, you would click the **Save** button to save the case. The saved case would be given a new sequential number and added to the saved case list. For this example, don't save the case. Click **Cancel**.

Create a Crosstab Report Global Template

This section describes how to create a crosstab report, and name and save the configuration as a *Global* template. The section also describes different ways the report can be viewed. With Manager-level access, you can check **Global** to make the template available to all users.
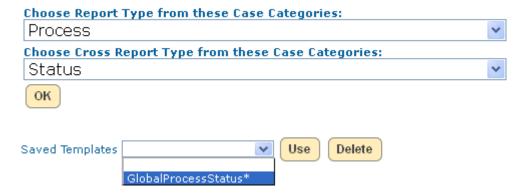
1. Click **Create Case Reports** in the main menu. The **Create Case Reports** screen appears. The screen displays three selection fields, **Report Type**, **Cross Report Type**, and **Saved Templates**. **Saved Templates** is described later in this manual.

2. By default, **Process** is selected in the **Report Type** selection field, and **Status** is selected in the **Cross Report Type** selection field. Leave these default settings.

3. Click **OK** to display a cross-tabular report based on **Process** and **Status**.

Cross-report: Process x Status

| Back | Hide lines without cases. ▼ | Update |

Report Filter **Filter:** No filter selected

New Template Name   **Global?**

[_____]   ☐   Save

Comment: [_____]

	Description	Count	Costs	Hours	Draft	Active	Open	Rejected	Closed
📄	Production	5	0.00	0.0		5			
📄	Marketing-Sales	1	0.00	0.0		1			
📄	HR	5	0.00	0.0	1	4			
📄	IT	4	0.00	0.0		4			
📄	Accounts	4	30.00	0.0		3		1	
📄	HSEQ	5	0.00	0.0		4		1	
📄	TOTAL	24	30.00	0.0					

| Switch Axis | Hide Values |

Calculate this value in the cross-report intersection and display:

| Count | Costs | Hours | Additional Values |

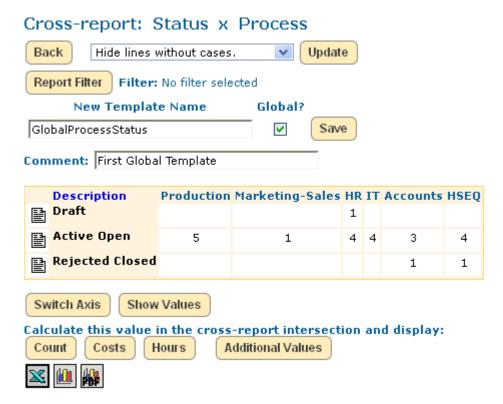The following steps save this report as a User-defined template.

4. Enter a template name in the **New Template Name** field (**GlobalProcessStatus**), and check the **Global** checkbox. This option is not available with User-level access. *Global* templates can be seen and used by all registered users.

5. Enter a comment in the **Comment** field (**First Global Template**).

6. Click the **Save** button. Saved report templates can be accessed in two ways. Templates are listed on the **Saved Case Report Templates** page. This page includes separate lists of *Global* report templates, and *User-defined* report templates. *Global* templates are available to all registered users, *User-defined* templates are only available to the user who created the template. This page also displays KPI target values, which will be described in another manual. Saved report templates can also be accessed in the **Saved Templates** drop-down field. Now you will display the same report by using the *Global* template you just created.

7. Click the **Back** button to return to the **Create Case Reports** page.

Create Case Reports

Choose Report Type from these Case Categories:

Process

Choose Cross Report Type from these Case Categories:

Status

OK

Saved Templates [ ] Use Delete

GlobalProcessStatus*

8. In the **Saved Templates** drop-down selection field, select the new template (**GlobalProcessStatus**) and click the **Use** button. The report is the same as the manually created report, but the template name and comment also appear. An asterisk indicates that a listed template is *Global* and is available to all system users. Only Managers and Administrators can create *Global* templates. Your template is available to all users.

9. Click the **Switch Axis** button, to change the table axis types. The cross-report heading has changed, the rows are now labeled by *Process*, and the columns are now labeled by *Status* types.
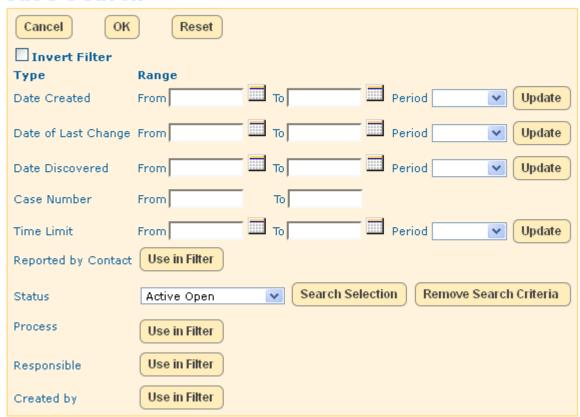
10. Click the **Hide Values** button. The Calculation Values are no longer displayed.

These steps return the previous display and filter the cases that are used in the report.

11. Click the **Switch Axis** button.

12. Click the **Show Values** button. The report is now returned to the earlier display format.

13. Click the **Report Filter** button. The **Case Search** page appears.

14. Click the **Use in Filter** button next to **Status**, and select status **Active Open** in the selection field.

Case Search

Cancel | OK | Reset

☐ Invert Filter

Type	Range					
Date Created	From [ ] 🔲 To [ ] 🔲	Period [▾]	Update
Date of Last Change	From [ ] 🔲 To [ ] 🔲	Period [▾]	Update
Date Discovered	From [ ] 🔲 To [ ] 🔲	Period [▾]	Update
Case Number	From [ ] To [ ]		
Time Limit	From [ ] 🔲 To [ ] 🔲	Period [▾]	Update
Reported by Contact	Use in Filter		
Status	Active Open [▾]	Search Selection	Remove Search Criteria
Process	Use in Filter		
Responsible	Use in Filter		
Created by	Use in Filter		

15. Click the **OK** button. The report now shows only cases with *Status* **Active Open**.

Description	Count	Costs	Hours	Active Open
📄 Production	5	0.00	0.0	5
📄 Marketing-Sales	1	0.00	0.0	1
📄 HR	4	0.00	0.0	4
📄 IT	4	0.00	0.0	4
📄 Accounts	3	0.00	0.0	3
📄 HSEQ	4	0.00	0.0	4
📄 TOTAL	21	0.00	0.0	

Add Contacts

1. Click **Contacts** in the main menu.

2. Click the **Add New Contact** button.

3. Enter a name in the **Name** field, an email address in the **Email** field, and a rate in the **Hourly Rate** field. **Hourly Rate** is not required.

NOTE: If additional company-specific fields have been added to the **Create New Contact** page, you may be required to enter more information.

4. Click the **Save** button to save the new *Contact*.

5. Click the **Add to Contact List** button to add the *Contact* to an existing *Contact List*.

NOTE: If you have entered a new contact who does not already have a system login account, contact your system Administrator.

Add Contact Lists

1. Click **Contacts Lists** in the main menu.

2. Click the **New Contact List** button.

3. Enter a name for the new *Contact List*.

4. Click the **Save** button to save the new *Contact List*.

5. Click the **Contacts** button for the new list.

6. Click the **New Member** button to add a new member.

7. Select a *Contact* from the drop-down selection field.

8. Click the **Save** button.
   Repeat steps seven and eight as needed to populate the new *Contact List*.

Add a Process

Process describes the type and area of work of a case. The top level *Process* also defines the department or group responsible for the case. *Process* sub-levels can be created to give a more

detailed description of the work involved in the *Process*. You can add a top-level *Process*, or add new sub-level *Processes* to that new *Process* or to existing top-level *Processes*.

1. Click **Processes** in the main menu.

2. To add a new top-level Process, click the **Add New Top Level Process** button.

    a. Enter a *Process* name, and select a **Process Contact List**, and a **Manager Contact List**.
    b. Check the **Active** checkbox to activate the new *Process*.
    c. Check the **Save** button to save the new top-level *Process*.

3. To add a new sub-level *Process*, click the **Sub-processes** button that corresponds to the top-level *Process* of your choice. Click the **Sub-processes** buttons until you have reached the level at which you wish to add a new *Sub-process*. When you have reached the level of your choice, click the **Add New Process** button.

    a. Enter a *Sub-process* name.
    b. Click the **Save** button to save the new *Sub-process*.

Add a Cost Calculation Type

Company-created *Cost Calculation Types* can be highly valuable additions to your incident case reports. Many companies rely upon *Cost Calculation Types* to derive the greatest value from case report data. To create a new *Cost Calculation Type*, follow these steps.

1. Click **Add Cost Type** in the main menu.

2. Click the **New Type** button.

3. Enter a name in the **Name** field. Select a type in the **Type** field. Enter a unit cost in the **Unit Cost** field. Enter a unit type in the **Unit** field. Check or uncheck **Hours** and **Active** checkboxes as needed.

    NOTE: If you check the **Hours** checkbox, the **Unit** field will display an "**H**" indicating that hours is the unit type.

4. Click the **Save** button to save the new *Cost Calculation Type*.

Add a Custom Field

Custom Fields allow you to expand the number and types of information in a case report.

There are four *Custom Field* types (Contact, Date, Select, and Text), and three *Custom Field* use cases (Case, Contact, and Corrective Action).

1. Click **Add Custom Field** in the main menu.

2. Click the **Add Field** button.

3. Select a type from the **Select Type** field.

4. Select a use case from the **Select Use In** field.

5. Click the **Save** button to save the new *Custom Field*.

Add a Select Set

Select type user defined *Custom Fields* allow you to add a drop-down selection field to the user interface. To complete a select type *Custom Field*, a *Select Set* is needed to populate the drop-down selection field.

1. Click **Add Field Select Set** in the main menu.

2. Click the **New** button to add a top-level *Select Set*.

3. Enter the name of the new *Select Set*.

4. Click the **Save** button.

5. Click the **Select Set** button in line with the newly created *Select Set*.

6. Click the **New** button.

7. Enter the name of the new subset.

8. Click the **Save** button to save the subset.
   Repeat as steps 6, 7, and 8, as needed to populate your *Select Set*.

Verify an Email Address

To verify the email address of an existing *Contact*:

1. Click **Verify Email Address** in the main menu.

2. Click the **New Verification** button in line with the address you wish to verify. A message will appear verifying that a verification email has been sent.

Send an Email to a Contact or Contact List

To send an email to an individual *Contact*, or to a *Contact List*:

1. Click **Send Email** in the main menu.

2. Select a *Contact* in the **To Contact** drop-down selection field and/or select a *Contact List* from the **To Contact List** drop-down selection field as the email recipient(s).

3. Enter a subject in the **Subject** field.

4. Enter text in the **Text** field.

5. Click the **Send** button.

View Email History

To view the ZIM internal email history:

1. Click **Email History** in the main menu.

2. To search the list of emails, enter search text in the text entry field and click the **Update** button.

3. Click the appropriate **Show** button to view individual emails. Please note that the email text will be displayed at the bottom of the **Email History** page. You may need to scroll to the bottom of the page to view the email.

Change Account Settings

The **Account Settings** page allows you to change your password, change the email address associated with your login account, or change the full name associated with the account. The **Account Settings** page does not allow you to change your account name, delete your account, or change your access level. These activities must be done by a registered ZIM Administrator. Newly entered passwords will not be saved unless you click the **Update Password** button. Newly entered email addresses and newly entered full names will not be saved unless you click the **Update Information** button. The **Account Settings** page also displays any *Contact Lists* to which you are a member.