ŽIM ZYLIN
Incident
Management

ZIM: Create a Report

This document describes how to create a new cross-tabular report, and then name and save the report configuration as a template for repeated use. This section also describes the different ways the generated report can be viewed. To fully demonstrate the power of the report feature, multiple incident cases should be created.

1. Click **Create Report** in the left side-bar menu. The **Create Case Reports** screen appears. The screen displays three selection fields, **Report Type**, **Cross Report Type**, and **Saved Templates**.

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

[   ] | Save |

Comment: [   ]

Description	Count	Costs	Hours	Active	Open
📄 Admin	1	45.00	0.5	1	
📄 Incident Report	1	270.00	3.0	1	
📄 Safety Inspection	1	90.00	1.0	1	
📄 TOTAL	3	405.00	4.5		

| 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 template for repeated use.

4. Enter a template name in the **New Template Name** field (**MyProcessStatus**).

5. Enter a comment in the **Comment** field (**1st 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. There are no *Global* templates available in the **ZIM DEMO**. Saved report templates can also be accessed in the **Saved Templates** drop-down field. Now you will display the same report using the new template.

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

Create Case Reports

Report Type

Process

Cross Report Type

Status

OK

Saved Templates [   ] Use Delete

MyProcessStatus

8. In the **Saved Templates** drop-down selection field, select the new template (**MyProcessStatus**) and click the **Use** button. The report will be the same as the manually created report, but the template name and comment will also appear. Your template is available to you alone.

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.

Cross-report: Status x Process

Back [Hide lines without cases.] Update

Report Filter **Filter:** No filter selected

New Template Name

MyProcessStatus Save

Comment: 1st Template

Description	Admin	Incident Report	Safety Inspection
Active Open	1	1	1

Switch Axis Show Values

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

Count Costs Hours Additional Values

These steps return the previous display format.

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

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