

ZYLIN INC.

# Zylin Incident Manager Brief User Manual

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## How to Contact Zylin Inc.

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## 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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# 1

## Introduction

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Welcome to Zylind 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. This manual describes the features of User-level access.

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. Manager-level access is described in a separate manual titled *Brief Manager 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, followed by the **Create New Case** and **Create Case Reports** screens.

**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 User-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.

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## 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

Allows you to access and use saved incident case report templates, and to view a list of KPI (Key Performance Indicator) target values. The **Saved Case Report Templates (and KPI Targets)** screen will be described in the *Create a Crosstab Report Template* section 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 Template* section below.

## 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* section.

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 User-level access, you can create and save a user-defined template and you can select a KPI target value for that template. 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 the *Create a Crosstab Report* section.

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.

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# Common User Scenarios

This section describes three key areas of User-level activity, adding new cases, creating cross-tabular reports, and changing account settings.

## 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

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 defined 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.

### Entered Estimates

Direct Calculations	140.00	Man Hours	1.0
Follow-on Costs	0.00	Man Hours	0.0
Sum costs this case:	140.00	Man Hours	1.0

Non-hourly Cost Types

Hourly Cost Types

Cost Type	Contact	Unit Cost	Number	Sum
Fixed cost (Direct cost)		80.00 /	1.0	80.00
	Note: Standard fixed cost automatically added to each incident.			<input type="button" value="Delete"/>
Contact cost (Direct cost)	Bill Fold	60.00 / H	1.0	60.00
	Note: Specific hourly cost added for time spent.			<input type="button" value="Delete"/>

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.

The screenshot shows the 'Activities' tab interface. At the top, there are two buttons: 'Save' and 'Cancel'. Below these are five tabs: 'Description', 'Responsibility', 'User Defined Fields', 'Costs', and 'Activities'. The 'Activities' tab is selected and highlighted in yellow. The interface is divided into three sections:

- Corrective Actions:** Contains two buttons: 'Add Corrective Action' and 'Delete Marked'.
- Activity Log:** Contains one button: 'Display Management and Status Changes'.
- Notifications:** Contains two buttons: 'Add Notification to Reporter Upon Closing' and 'Additional Notification'. To the right of the first button, it says 'Contact who reported case: Bob Harboe'. Below the second button, it says 'Notification is always sent upon closing to Contact who entered case: Bob Harboe'.

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.

## Corrective Actions

Corrective Action	Responsible	Time Limit	Status	Delete
Contact Payroll Co.	Bill Fold <input type="button" value="v"/>	02 Nov 2011 <input type="button" value="calendar"/>	Open <input type="button" value="v"/>	<input type="checkbox"/>
Contact Bank	Bill Fold <input type="button" value="v"/>	02 Nov 2011 <input type="button" value="calendar"/>	Open <input type="button" value="v"/>	<input type="checkbox"/>



- 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.

## Notifications

Contact who reported case: Bob Harboe

Notification is always sent upon closing to Contact who entered case: Bob Harboe

Notify:	Subscription Contact List	Subscription Contact	Time	Delete
Upon Closing <input type="button" value="v"/>	Accounts List <input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="calendar"/>	<input type="button" value="Delete"/>
Message: <input type="text" value="The recent payroll error has been successfully resolved and the case has been closed."/>				
Entered by: Bob Harboe				

- Select Accounting List in the **Subscription Contact List** selection field.
- 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 Template

This section describes how to create a new crosstab 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.

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

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 (**MyProcessStatus**).
5. Enter a comment in the **Comment** field (**My First 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 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

MyProcessStatus

Use

Delete

GlobalProcessStatus\*  
MyProcessStatus

8. In the **Saved Templates** drop-down selection field, select the new template (**MyProcessStatus**) 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 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

**Filter:** No filter selected

**New Template Name**

**Comment:**

Description	Production	Marketing-Sales	HR	IT	Accounts	HSEQ
<b>Draft</b>			1			
<b>Active Open</b>	5	1	4	4	3	4
<b>Rejected Closed</b>					1	1

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

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

**Invert Filter**

Type	Range				
Date Created	From	<input type="text"/>	<input type="text"/>	To	<input type="text"/>
		<input type="text"/>	<input type="text"/>		<input type="text"/>
				Period	<input type="text"/>
					<input type="button" value="Update"/>
Date of Last Change	From	<input type="text"/>	<input type="text"/>	To	<input type="text"/>
		<input type="text"/>	<input type="text"/>		<input type="text"/>
				Period	<input type="text"/>
					<input type="button" value="Update"/>
Date Discovered	From	<input type="text"/>	<input type="text"/>	To	<input type="text"/>
		<input type="text"/>	<input type="text"/>		<input type="text"/>
				Period	<input type="text"/>
					<input type="button" value="Update"/>
Case Number	From	<input type="text"/>		To	<input type="text"/>
Time Limit	From	<input type="text"/>	<input type="text"/>	To	<input type="text"/>
		<input type="text"/>	<input type="text"/>		<input type="text"/>
				Period	<input type="text"/>
					<input type="button" value="Update"/>
Reported by Contact	<input type="button" value="Use in Filter"/>				
Status	<input type="text" value="Active Open"/>		<input type="button" value="Search Selection"/>		<input type="button" value="Remove Search Criteria"/>
Process	<input type="button" value="Use in Filter"/>				
Responsible	<input type="button" value="Use in Filter"/>				
Created by	<input type="button" value="Use in Filter"/>				

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

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

## 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.

