

## ZIM: Add a New Case

The following instructions describe how to add a new ZIM incident case:

1. Click **Add New Case** in the left side-bar menu.  
The **Create New Case** screen appears with the **Description** tab active. There are 3 required fields, **Discovery Date**, **Process**, and **Description**. We will fill in these fields, and also enter a **Time Limit**.
  - a. Click the calendar icon beside **Discovery Date** and select today's date.
  - b. Click the calendar icon beside **Time Limit** and select the last day of the month.
  - c. Select **Incident Report / Damage to Building** in the **Processes** drop-down list.
  - d. Enter a description of the incident in the **Description** text box.

### Create New Case

Case Number	Date Created	Created by
Assigned Upon Save	4/25/12	tombaxter99@gmail.com
Status	Discovery Date *	Time Limit
Active Open <input type="button" value="v"/>	25 Apr 2012 <input type="button" value="calendar"/>	30 Apr 2012 <input type="button" value="calendar"/>
Processes *		
Incident Report / Damage to Building <input type="button" value="v"/>		
Description *		
Enter a description of the incident in this text box.		
Actions for this case		
Corrective Measure		

2. Navigate to the **User Defined Fields** tab. This tab displays custom fields that have been defined by the general contractor for use by the subcontractors. In the **ZIM DEMO**, the tab displays one custom field, **Severity of Consequences**.

**Severity of Consequences**

3. Select a level of severity for this incident from the drop-down selection field.

ZYLIN INC.

411 W, Miner Street  
West Chester, PA 19382  
Toll Free: 1-866-980-3434  
Email: zim@zylin.com  
Web:: www.zylin.com

4. Navigate to the **Costs** tab. This tab displays Hourly and Non-hourly cost types. For this tutorial, we will ignore the Non-hourly cost types and will enter an Hourly cost for this incident.

Description | User Defined Fields | Costs

**Entered Estimates**

Direct Calculations	<input type="text" value="0.00"/>	Man Hours	<input type="text" value="0.0"/>	
Follow-on Costs	<input type="text" value="270.00"/>	Man Hours	<input type="text" value="3.0"/>	
Sum costs this case:	<input type="text" value="270.00"/>	Man Hours	<input type="text" value="3.0"/>	<input type="button" value="Printed Report"/>

Non-hourly Cost Types

Hourly Cost Types

Cost Type	Contact	Unit Cost	Quantity	Sum
Additional Time for Incident (Indirect cost)		<input type="text" value="90.00"/> / H	<input type="text" value="3.0"/>	<input type="text" value="270.00"/>

Note:

5. Click **Add Cost** next to **Additional Time for Incident**. The tab now displays additional cost entry fields.
  - a. Enter 90.00 in the **Unit Cost** field. This is the total calculated cost per hour to the company for the individual entering the case.
  - b. Enter 3.0 in the **Quantity** field. This is the actual number of additional hours caused by the incident.
  - c. Add a descriptive note in the **Note:** field.
  - d. Click the **Update** button to update the **Entered Estimates** displayed on the **Costs** tab.
6. Click the **Save** button at the top of the page to save the new incident case.
7. After reviewing the **Receipt for Entered Case** page, click the **Finish** button.