# Zylin Incident Manager
# Brief Administrator 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/`

# Contents

Contents

# 1

# 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 you to register incidents, assign responsibility, monitor incident cases, and create incident case reports and crosstab reports. User-level access is described in a separate manual titled *Brief User Manual*.

Manager-level access allows you to add contacts, create contact lists, and to define company-specific processes. Manager-level access allows you to create individualized cost types, define custom information fields, and selection sets. Manager-level access allows you to verify *Contact* email addresses, and to send email to *Contacts* and *Contact Lists* from within the application. Manager-level access also includes all the features of User-level access. 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. This manual describes the specific features of Administrator-level access.

# User Interface

This section describes the key features of the graphic user interface, starting with the main menu. Administrator-level access includes **Organization**, **Administration**, **Login Account**, and **Terminology**. Administrator-level, unlike Manager-level access, does not allow the administrator to create new cases.

> **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.

### Organization

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

#### Contacts

The **Contacts** menu item displays the **Contacts** page, which allows you to view all *Contacts*, to search 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 *Contact Lists*, and to create new *Contact Lists*.

### Administration

The **Administration** menu item displays the system **Users** page. The **Users** page lists all user accounts and indicates the maximum number of users. The **Users** page allows the administrator to add, delete, and change login user accounts, and to log in as any of the users or managers in order to view, reproduce, and correct system problems.

## 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.

# Common Administrator Scenarios

This section describes key areas of Administrator-level activity.

## Add Contacts

As an administrator, you will be adding new system login accounts. Login accounts are associated with *Contacts*. If no *Contact* exists for a new login account, you will need to create a new *Contact*. To add a new *Contact*:

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*.

## Adding Login Accounts

Administrators can add, delete, and change login accounts, and can also log in as another account holder for diagnostic and corrective action. To add a new login account:

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

2.  Click the **New Login Account** button.

3.  Enter a new **Login**, a **New Password**, and  repeat the password in **Repeat Password**.

4.  Select an **Access Level** for the new account.

5.  Select a *Contact* to associate with the new login account. If there are no available *Contacts* in the **Contact Name** selection field, add a new *Contact* as described above.

6.  Click the **Save** button to save the new account.

# Change Account Settings

The **Account Settings** page allows the administrator to change the administrator password. Newly entered passwords will not be saved unless you click the Update Password button. The **Account Settings** page also displays any *Contact Lists* to which the administrator is a member.