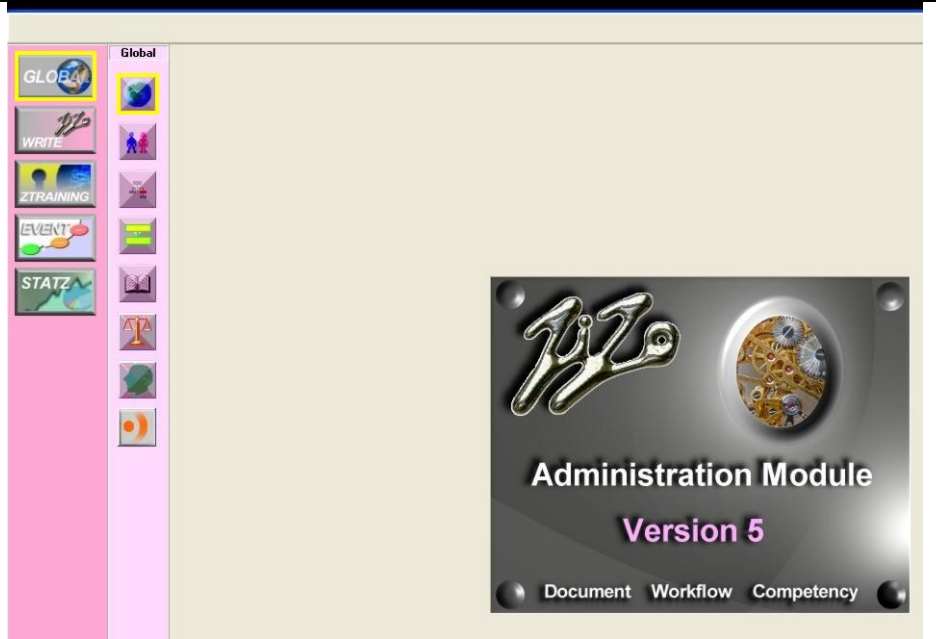


ZIZO Systems International  
 Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
Main menu	
Definition	
Main access point to all of the administrative features of the ZIZO system and the plug-ins	

Notes													
<p>The icons available are;</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Global -</td> <td>Maintenance of system parameters for the ZIZO software and plug-in modules</td> </tr> <tr> <td>Write -</td> <td>Maintenance of the ZIZO write program</td> </tr> <tr> <td>Ztraining (Plug-in)</td> <td>Maintenance of the ZIZO Training module</td> </tr> <tr> <td>Event Manager (Plug-in)</td> <td>Maintenance of the Event Manager module</td> </tr> <tr> <td>Statz (Plug-in)</td> <td>Maintenance of the Statistical module</td> </tr> <tr> <td>Badge (Plug-in)</td> <td>Maintenance of the badge or client customisation feature</td> </tr> </table> <p>Minimum pre-requisites for a ZIZO Administrator is competency with MS Windows and the Office 2000 suite of products. A knowledge of graphic manipulation is recommended.</p>		Global -	Maintenance of system parameters for the ZIZO software and plug-in modules	Write -	Maintenance of the ZIZO write program	Ztraining (Plug-in)	Maintenance of the ZIZO Training module	Event Manager (Plug-in)	Maintenance of the Event Manager module	Statz (Plug-in)	Maintenance of the Statistical module	Badge (Plug-in)	Maintenance of the badge or client customisation feature
Global -	Maintenance of system parameters for the ZIZO software and plug-in modules												
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Event Manager (Plug-in)	Maintenance of the Event Manager module												
Statz (Plug-in)	Maintenance of the Statistical module												
Badge (Plug-in)	Maintenance of the badge or client customisation feature												
NOTE													
<p>The plug-in module buttons will only be visible to sub-scribers</p> <p>Only ZIZO administrator and sub administrators have access to the administration module</p>													

ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
Global	
Definition	
The area where system parameters and defaults are set	

Notes

ZIZO Systems International  
 Training manual for Version 5.0 – **ADMINISTRATION MODULE**

The ZIZO icons include;



Employee / User



Parameters



Job titles



Templates



Audit log



Profiles

UNC Button

For future release

**Screen**

Global parameters

**Definition**

The menu options for determining the control levels and system parameter settings for operation

### **Company data tab**

#### Company

Basic details about the company are entered. The Company name is used on all document headings during the print routine. Not editable, sourced from the subscription file that is issued with license renewal.

#### Administrator

The administrator's name (Reference only)

#### Extension

The telephone number extension of the administrator for the user to query.

#### Pr Sec Lvl

The printing security level allows the user to print information from the system eg. Print level 8 will permit users only with access levels 1 - 8 to print.

#### E-mail sec lvl

The E-mail security level allows the user to post information from the system via e-mail. EXAMPLE - If the security level assigned is 5 then only users with levels 1-5 access will be allowed to post e-mails.

The addressee will receive notification via e-mail with the document attached in RTF. The header will **not** contain valid information, as the document has not been accessed directly from the ZIZO system as is therefore uncontrolled.

#### DAS lvl

Allows a system security level to be imposed on the DAS. If set to 5 then only users with security levels 1-5 will have access to the DAS via the DAS icon in the read module

#### SMTP Userid

Must contain a valid user account eg zizo@company.co.za

#### SMTP Password

Enter the password assigned to the user account above, the ZIZO software will use this account as a channel with which to access the database, it would need to be allowed firewall/anti-virus/spam access.

#### Mail port

This is usually 25 for SMTP, please confirm with your IT department.

#### Mail server

The IP address of the mail server.

#### Testing

The test email connection establishes connection and line availability  
Test message will test the complete e-mail send routine. Enter any valid account as the test email address.

#### Clear e-mail queue

When an e-mail is sent ZIZO checks to see if the user is logged onto the mail server if so then the e-mail is sent immediately, if however no connection is detected then ZIZO automatically queues the mail and waits for the next logged user, when this is detected the queue is cleared via the logged user transparently. This option clears the queue.

### **Autosave tab**

Check the autosave box to activate  
Enter the interval in number of minutes for saving an open document. The system then runs the autosave feature and if a document editing session ends abnormally, a prompt will be given upon re logging in, allowing to continue editing without loss of information.

### **Shelf Life tab**

#### Shelf Life

**On/off** If checked, this activates the shelf life feature to ON and maintains periodic evaluation or review of the document.

#### **Days before expiry**

A value can be entered to a maximum of 10. This indicates when a user must be prompted (in days) before the expiry date

#### **Auto**

If checked then the shelf life system automatically loads a DAS request on the date (date = shelf life date minus the days before expiry) and the process is depicted in the DAS as [Preview] type

#### **Manual**

If checked then a 'centralised' method for shelf life management is routed via the administrator who is notified of expired documents via the 'spinning hour glass' in the zizo administration module. The entire management process is manual and the administrator would mail the document owners informing them of the expiration, they would update the information either via the DAS or mail the administrator for update and the next shelf life date is set on the header of the document for the cycle to repeat itself.

#### **Months from now when document is saved**

Allows a number input for months that a document's revision number must remain unchanged, before it is reviewed. **EXAMPLE:** If this is set to 12 then each document that is edited and saved will have its anniversary for review 12 months hence from the date it was last **updated**, this will stagger review into a 'trickle' method spread over a period as opposed to a 'tsunami' option whereby large volumes of documents are reviewed over a short period.

#### **Divisional selection**

If checked then shelf life can be activated for specific divisions only. (The division must be checked to allow shelf life, this is done via Division maintenance.)

#### Reset shelf life

This option can be done for all documents or only for specific divisions

#### **New date**

A date can be entered to determine the kick-off date for the shelf life feature to commence, this date can be 'back dated' and once the reset option is taken, every document's shelf life is reset accordingly, the only exception to this rule is a document that has a fixed shelf life as defined in the header (at document level). The reset option can also be instituted across specific divisions if this has been setup via the division maintenance menu

**Reset shelf life on all procedures**

Once this button has been pressed the new date is applied to all documents as mentioned above as the shelf life date

**Division**

Shelf life can be set per division, this option applies the new shelf life date to the specified division only

**Reset shelf life on the divisions procedures**

Pressing this button activates the shelf life date load only to the selected division

**Parameters tab**

Auto revision

**Proc/GAF** If checked for procedures or GAF's then revision control is automated by the system and cannot be edited. Each time a document or GAF is maintained the revision status will enumerate by one.

**Image control**

for future release.

Document control

**Track Amendments**

Forces the author of a document to be prompted and a summary of changes must be written prior to saving a document. In the read module a history of every change can be viewed for a document from its inception.

**Header reminder**

Pops up the header screen for update prior to save

**Frequencies**

Activates the frequency feature and allows it to be setup per user via the frequency tab on the user details screen

Unread procedures timer

**Show unread procs**

If checked, users will be prompted at logon to read all documents that have been updated since they last accessed the system. If the user does not read a document on the list, the document will remain on the users audit trail as unread.

**On/Off timer**

If checked, then active. Enter the number of minutes that the change prompt should refresh and notify the logged on user of document change.

Other settings

**Archiving**

If switched on, then it activates each time a document is accessed via the write module word processing and the OK button is pressed. ZIZO will file the previous version of the document as an RTF into a sub-directory as stated in the ArchivePath in the zizo.ini file. The sub-directory is automatically created and named using the Division abbreviation where the document is located.

**Auto Logon**

If checked, activates the auto logon process and allows users to activate this feature via user maintenance

**Warn DAS same day**

If checked, then a message appears when a user logs a DAS request for a document that has already had a DAS request logged on the same day. The message can be ignored and a DAS request can be made

**Allow macro printing**

If checked then users can print the entire system and filter per division/department/work flow and doc

**Prompt user to print directly**

If memory or storage problems occur during the printing cycle then this option assists with the streamlining and makes the printing process less memory intensive, by by-passing the preview option and sending the job directly to the printer

**Add system info to system audit**

If checked then system information is added to the log file that includes machine/user and diagnostic data from the client workstation

**Show GAF Hint**

Displays links for GAF objects in zread when mouse hovering

**Adjust GAF resolution on start up**

Set to never adjust

**System audit**

**Records in audit log**

Allows a number of logs to be generated prior to notification to conduct a backup of the audit logs (via the audit logs menu (scale icon) from the global menu. A log contains user-tracking information.

**Dual record prompt**

If a document is opened for editing by more than one user then the system will prompt subsequent users

**GAF Resolution**

Do not check – Available for old green screen monitors

**ZIZO Module EXE names**

Allows dynamic links to be made to the ZIZO plug in modules via the GAF ole option. Insert the names of the relevant exe files located in the ZIZO application directory

**Logon filter tab**

If this option is checked then the associated GAF will be displayed in the read module as the default logon GAF for all users (Blue button icon)

**Colour coding tab**

This option if used with the Change prompt, alerts users quickly to the changes made within a document by colour coding the altered text.

#### Colour Code Level 3

A default colour mode is set for authoring. The system reserves the RED colour for this operation

HINT - To inform readers of information PASTED into a document, add START and END to highlight the change

#### Colour code DAS

A default colour for highlighting the changes made in a document in order to assist the committee with their evaluation.

#### Colour code Hyperlink

This will appear in the body of a document and a mouse-over will change the pointer revealing a link, the internet standard is normally blue!

#### Auto clean up

This facility will scan the document and reverse the selected level 3 colour to black prior to updating.

#### Grid colour scheme

Select the colour and shade for list boxes in the ZIZO system

#### **ZIZO Admin tab**

This feature allows for the association of an image in the allocated ZIZO Images directory that will be viewed through the ZIZO read module portraying the ZIZO Administrator

To add the photo of an administrator, Scan the photo, and save it either as a jpg or .bmp file, in the Image bank, with the name Admin ID.jpg (.bmp)

Should the ZIZO Administrator's photo change, then overwrite this file with the new image. Used for reference only.

#### **Event manager tab**

Used by the Event manager plug-in module to;

Activate the module, purge records, addendum control, setting up corrective and preventive action, currency prefix, module colour swatches and event type selection

#### **Librarian tab**

Execute librarian

If checked then the librarian is active and each time a user opens the ZIZO read module the librarian launch pad is spawned to the task bar. Activate

Public/Private pages

If checked then the Librarian system sets up a public and private page for each user on the system using GAFs with the prefix as per input into the Librarian Division Name

Activate Project Librarian pages

If checked then the project option is activated and documents can be captured via the librarian launch pad directly into a project.

Librarian Name

The abbreviation denotes the prefix of the librarian naming system, default is LBR

Background



Default wallpaper can be chosen for all librarian activities and can be overridden by the user.

GAF link behaviour

When documents are dropped onto the librarian launch pad they can be assigned to personal/public or project GAF's/Folders. The behaviour feature allows the default configuration setting to determine the location where the auto-created text/ole objects appear on the GAF.

### **Header settings tab**

Document header settings

A selection of information that will appear on every document as a header when printed. The header is pre-set by the ZIZO system.

Header settings

Check the boxes for the titles that are to appear on the header.

Company logo

The logo option will allow a pre-sized bitmap (as defined) to be inserted into the header in a pre-allocated space reserved for a graphic. ZIZO stores the logo in bitmap format into the Flowbmp directory as setup in the zizo.ini file.

Orientation provides for the selection of the print layout default used in the system, in most instances this would be portrait. If set to portrait, specific documents can be overridden to appear as landscape by forcing the selection at document level in the header menu.

Header lines

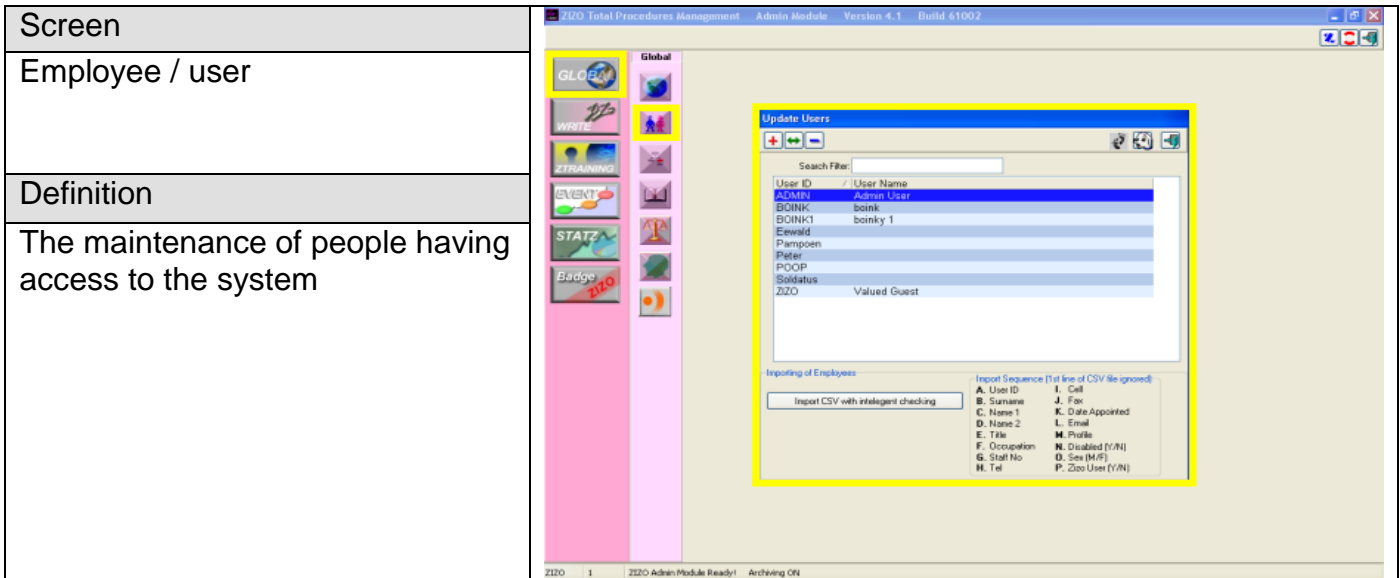
The text inserted will appear on every page of every document that is printed.  
EXAMPLE : Can be used to indemnify the company against printed copies by stating;

Printed document are not controlled, refer to the ZIZO system for controlled documentation.

Call centre

For future use

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 Training manual for Version 5.0 – **ADMINISTRATION MODULE**



**Notes**

The update users screen has the following features;

A list of users appears and can be sorted by either name or ID by clicking on the list action bar. The bottom part of screen is focused on the mass import of user data from an external system in the prescribed CSV format. The intelligent check feature performs a comparison of data and highlights any variances such as the addition or deletion of users. Ideal for synchronising information with a Human Resources system. Users can be added (by selecting the red plus button) or maintained (by selecting the green dual arrow) or deleted (by selecting the blue minus button) These icons are used throughout the ZIZO system.

The User Usage (Footprint) button displays relevant information about the selected user relating to their work-in-progress on the system, always use this option **prior** to deleting a user in order to avoid creating bottlenecks, as the footprint will indicate areas where data is waiting for the user's input. The inputs can be cleared either automatically by trashing the committees assigned to a user or by logging-on as the user and accepting/rejecting outstanding prompts eg DAS or Event manager investigations/actions

The 'dog' icon is a broadcast feature that allows the administrator to select users and deliver a broadcast message to users that have their email addresses entered into their user profiles. This option is handy to print and analyse authorisations such as security levels and committee memberships

**HINT**

Great for warning users of pending audits and new additions to the system.

By selecting the add/maintain user, the user detail screen activates detailing;

User code	Unique identifier of a user. input up to 8 alpha numeric values only.
User password	The password together with the corresponding user code allows access to the system. Neither are case sensitive or need forced change, input up to 8 alpha numeric values only ZIZO allows a user to be created without a password if required, just leave this field blank. A password is required for access to the administration module
Display name	Appears as a greeting when logging on, input up to 25 alpha numeric values only
ZIZO User	If checked, then the user is included with all ZIZO document control functionality and has a log in and password to access the system, if unchecked then the user is entered only as a record or statistic for the Event Manager and Statz modules and cannot access the system. The default is checked.

The only mandatory field is the USERID and this cannot be edited once created.

Name / Surname	Title - Name1 - Name2 – Surname allow for each user to be identified even if they have the same surname.
Details include:	Occupation, network ID (used for auto-logon), staff number, and contact details. Tel,Cell and Fax only for reference

**Note:** The e-mail address is required for notification via broadcast and event manager plug-in module. User details are available for customised reporting.

Profile	Profile options are available for affirmative action record or may be applied for logical user classification such as job experience and qualifications etc.
---------	--

The user continued tab contains primarily input fields relating to the ZIZO plug-in modules with the following exceptions;

ZIZO User	If not checked then user is added merely for statistical purposes.
Remote user	If checked, this identifies the user as a WAN user using the ZIZOLite logic for data transfer
Auto logon	If checked, the user is auto logged into the ZIZO read module when logging onto the network. The network user ID on the user data screen must be completed and the auto logon must be checked in the parameter screen for this to activate.
Security level	There are 10 security levels assigned as follows; Level 1= ZIZO administrator Level 2= ZIZO sub administrators Levels 3-10= Users (read only) Departments, workflows and documents may have security levels assigned therefore levels are normally related to seniority within the organisation. Example: Directors = 3 Management = 5 Users = 10 (default) If a document is assigned level 6 security, then only levels 1-6 may read

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 Training manual for Version 5.0 – **ADMINISTRATION MODULE**

	the document, in this case the directors and management as in the case of a company car scheme! The gaps in numbering allow for future incorporation of additional management levels
The Divisions tab	Select a Division from the 'Available' list for discreet assignment, all the divisions can be added by right mouse click and select the "add all" option. De-selection is made by clicking and dragging the division onto the trash bin
The logon filter tab	Each time a user logs on to the system a menu appears, this can be tailored for each user. Check the logon filter option then navigate to a menu via filtering through a division and selecting from the list by clicking on the row, a thumbnail will appear of the selected menu. This screen overrides the default logon filter set up in the parameters menu.
Job title tab	As defined under global → job titles, this is used for reference only and is a mandatory field for the creation of a user. Job titles could be used to band users together EXAMPLE: visitor, auditor, power user etc.
Committees tab	Committees are used in the DAS (Document Approval System) cycle. As a document is routed via committees for approval, each committee has a member/s that need to accept or decline the change request. This menu allows a user to become part of a committee.
Committees	Lists all of the committees available for selection, this is done by selecting one and dragging it with the mouse onto the 'is member of' box. If a committee is deleted (dragged to the trash can) ZIZO automatically validates the DAS and will prompt for any WIP cases pending and the 'automatic accept' option, will provide continuance to the pending cases against the user by automatically accepting the request in order to gain closure.
Is member of	Lists all the committees the user is a member of, resignation from a committee is conducted by dragging an entry from the 'is member of' onto the trash can.
Prompt tab	A user is assigned to a Division and will therefore be prompted of all changes made to documents in that division, if however you need to refine prompting within a division, ie. to a department, workflow or specific documents, then this option is required. The logic applied is as follows; User A has access to Finance division. In Finance there are departments; Accounts Payable, Accounts Receivable, Ledger and Assets. User A should only have access to Ledger So by making a selection at department level to Ledger and dragging it across to the permit box, this automatically excludes all the other departments and the user will be prompted for documents changed only in the ledger department.
Frequency tab	If the 'none' box is checked, the user will not be prompted for changes. This feature allows the assignment of documents over a calendar period for a specific user. The user is prompted in the read module and their

workload for the week is displayed. The documents assigned should be repetitive ie. Forms, in-put sheets, report templates etc.

**PROCESS**

A frequency is added

A document is assigned via the navigation screen (Div/Dept/Wflw) The assigned document is listed as non-defined (Defined status = N)

It must then be defined by selecting the “define selected Query” option

A time frame is selected either Daily, Weekly, Monthly or Yearly.

**NOTE** :

The daily option provides for multiple selection and exclusions in a week

Training

frequency Tab This feature is active only if the Ztraining module is installed.

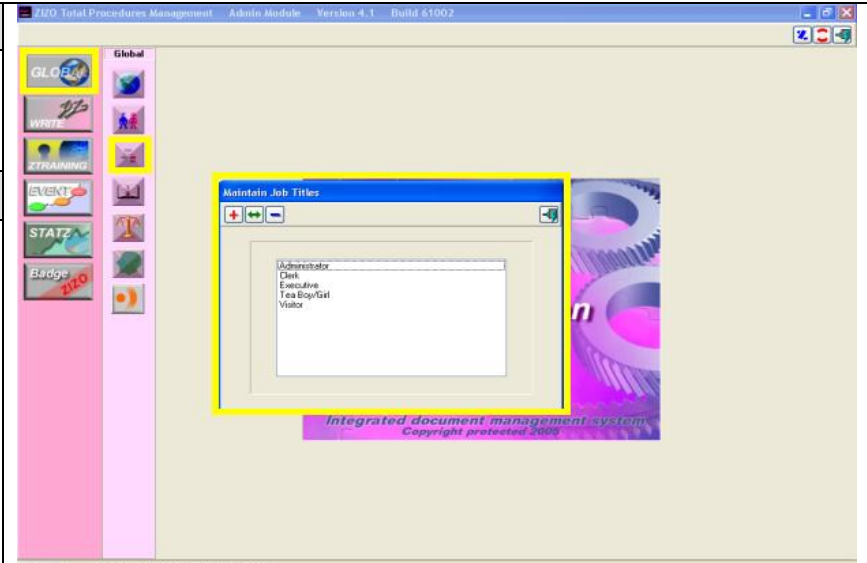
**NOTES**

**Deleting a user**

The following steps should be applied when deleting a user

- 1) Do a footprint of the user to determine WIP and committee memberships
- 2) Open a session of ZIZO logged in as the user and clear all prompts
- 3) If the user was only a member of a committee containing more than one member then he can be deleted, if he was part of a one-member committee ensure that another committee is assigned via DAS to continue the approval process

ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
Job titles	
Definition	
The classification of users into a logical collective	

**Notes**

Job titles are assigned to users for reference only (at this stage) and can be based on the employee grading system (e.g. Patterson) or on designation

**Maintain job titles menu**

Job titles may be created, updated or deleted.

**Job title menu**

A free text field allows for the addition of a new title, this would appear in the job title list box for selection, when updating the user

Limited to 40 chars alpha numeric.

**NOTE:** Job title selection is mandatory when adding a user on the system.

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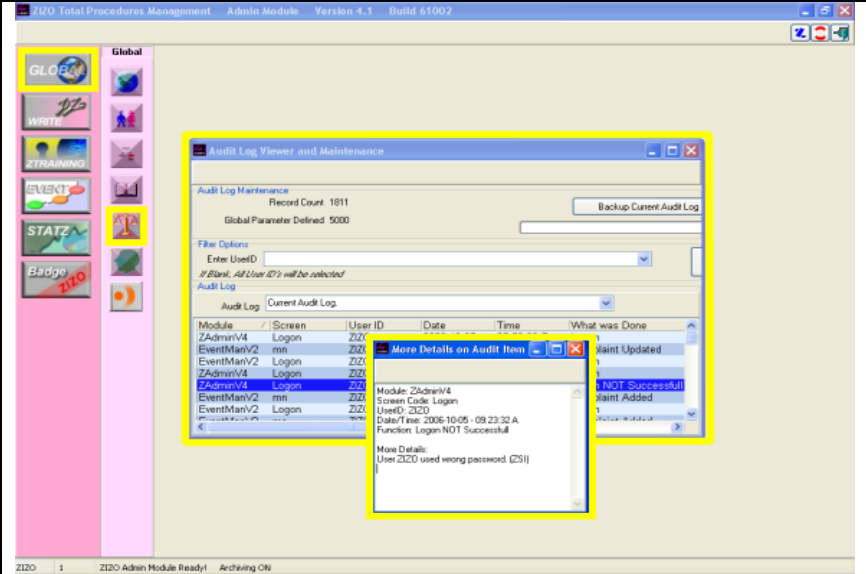
<b>Screen</b>	<thead> <tr> <th>Template Name</th> <th>Procedure</th> <th>System</th> </tr> </thead> <tbody> <tr> <td>Sample EM form</td> <td>QUA-QW-MAN-100</td> <td>EVENT MANAGER</td> </tr> <tr> <td>Sample training form</td> <td>QUA-QW-MRP-100</td> <td>TRAINING MODULE</td> </tr> </tbody>	Template Name	Procedure	System	Sample EM form	QUA-QW-MAN-100	EVENT MANAGER	Sample training form	QUA-QW-MRP-100	TRAINING MODULE
Template Name		Procedure	System							
Sample EM form		QUA-QW-MAN-100	EVENT MANAGER							
Sample training form	QUA-QW-MRP-100	TRAINING MODULE								

| **Templates** |
| **Definition** |
| The storage and printing of forms used in remote business areas that do not have direct access to the ZIZO system, and are therefore reliant on completing hard copies. |

**Notes**

This option applies to the Event Manager and Training plug in modules

ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
Audit	
Definition	
The tracking of users footsteps through the system	

**Notes**

The audit log menu

Provides a dynamic record count

Backup program

The selection of the backup program writes the current audit log to the database for record purposes and names it chronologically from the time it was created until it was backed up, a new audit log is automatically started.

Filter

The audit log can be filtered by user and activated via the 'apply filter' button.

Audit log

The displayed audit log is the currently active version.

Previously saved versions can be viewed via the backup program.

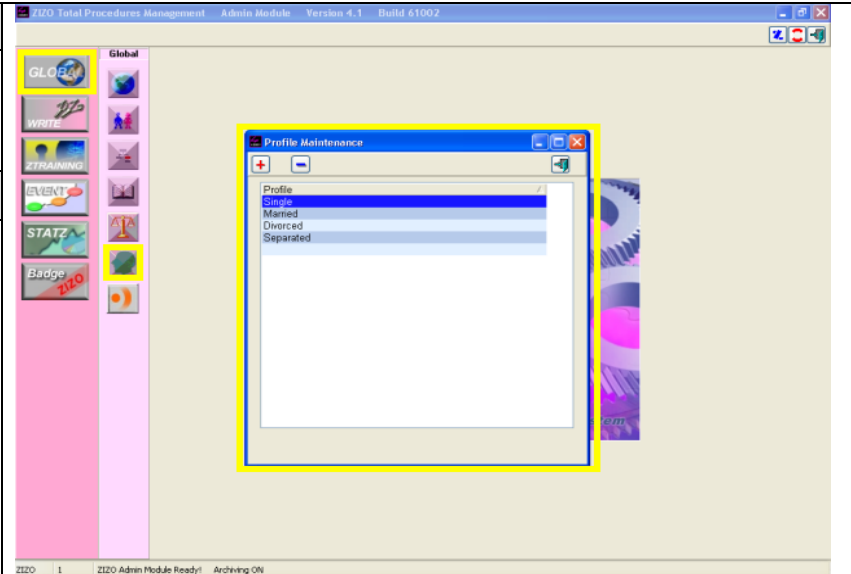
Double click on a log to display the log details

NOTE : If the 'Add system info to system audit' box is checked in global parameters then additional data is displayed

Audit log includes the Event Manager plug-in module



ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
Profile	
Definition	
The classification of users into logical profiles.	

**Notes**

**Profile maintenance screen**

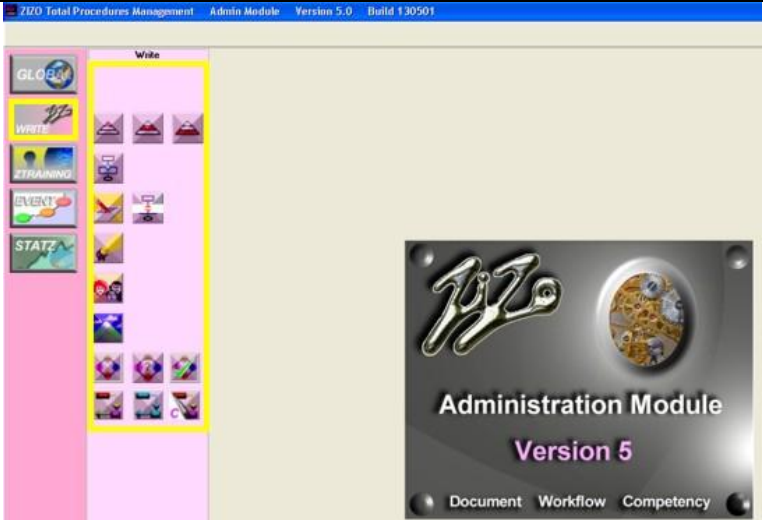
Provides for the addition and deletion of user profiles

**Profile maintenance input screen**

Allows up to 30 chars alpha numeric to describe the profile

The profile appears in the user menu as a 'profile group' to which the user can be associated with. Used for reference only

ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

Screen	
ZIZO Write	
Definition	
Contains the building blocks, navigation and authoring processes of the ZIZO system.	



Division (First of the three building blocks based on process flow)

Defined as logical areas that together make up the organisation.

Once the UPDATE DIVISIONS window appears either select the PLUS (Add), DOUBLE ARROW (Update) or MINUS (delete).

On selection the DIVISION DETAILS window will appear.

NOTE: ALL NAMES SHOULD INCLUDE ALPHA NUMERIC VALUES ONLY.

NONE OF THE FOLLOWING MAY BE USED

“.:|\+=\_)(\*^%\$#@!/?><.,’}][

**ONLY A USER WITH SECURITY ACCESS LEVEL 1 WILL BE ABLE TO UPDATE DIVISIONS**

Enter the Division name.

Enter the abbreviation and be sure to use 3 **logical** characters in this area. The system defaults the abbreviation into uppercase and all abbreviations cannot be altered once created as they form part of the unique document key.

Once completed press the Ok button to return to the UPDATE DIVISIONS window.

On returning to the UPDATE DIVISIONS window click the OPEN DOOR button to return to the main menu.

Assign this division to all users - If assigned to all users is checked, this division is automatically allocated to all users

Activate shelf life – if checked then the shelf life feature can be setup only for this specific division, this is done in conjunction with the global parameters – parameters tab

ZIZO displays Divisions in the read module alphabetically based on the abbreviation

Guidelines on optimising the building blocks

**Hierachical database design**



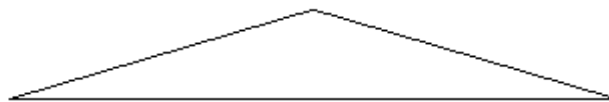
**Indented**

**SYMPTOMS:**

- Lengthy documents
- Too few documents per workflow
- GAF's have few drill downs

**REMEDY:**

Index one large document into many smaller documents



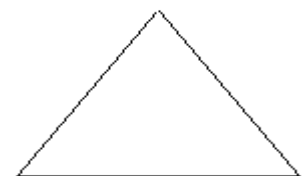
**Shallow**

**SYMPTOMS:**

- Documents too short (Sometimes only one paragraph)
- Too many documents per workflow (more than 30)
- GAF's are too busy and confusing to read

**REMEDY:**

Expand additional workflows to create classes



**Balanced**

**SYMPTOM:**

- Documents do not exceed 6 pages in length
- GAF's are easily read
- Logical classification of data therefore no need to use 'search' to locate process driven information.
- Lack of ambiguity, documents contain specific information



Department - Defined as areas of the business process flowing through a Division.

Once the UPDATE DEPARTMENTS window appears either select the PLUS, DOUBLE ARROW or MINUS.

On selection the DEPARTMENT DETAILS window will appear.

Enter the Department name.

Enter the 3-character abbreviation, alphanumeric values only.

The security level granting access begins at this level.

Once completed press the Ok button to return to the UPDATE DEPARTMENT window.

On returning to the UPDATE DEPARTMENT window click the OPEN DOOR button to return to the main menu.

HINT Indents may be used to identify parent child relationships. ZIZO auto appends new departments, however if a department is selected the insertion is above the selected row.

By creating the first department within a Division called 'Overview', assists with the hierarchical creation of summarized GAFs creating the ZOOM IN or drill down logic.



Workflow - Defined as the processes or activities within a Department.

Once the UPDATE WORKFLOW window appears either click the PLUS, DOUBLE ARROW or MINUS.

On selection the WORKFLOW DETAILS window will appear.

Enter the Workflow name.

Enter the Abbreviation of 3 alphanumeric characters.

The second level of security access is applied at workflow level.

Once completed press the Ok button to return to the UPDATE WORKFLOW window.

On returning to the UPDATE WORKFLOW window click the OPEN DOOR button to return to the main menu.

HINT Indents may be used to identify parent child relationships. ZIZO auto appends new Workflows, however if a Workflow is selected the insertion is above the selected row



### Graphic filters (GAF)

Once the GAF window appears, select the correct Division, Department and Workflow and follow the procedure that follows.

If a filter exists for the workflow, the add option is grayed out!

GAF's may only be assigned to a Workflow

The unique label for the GAF is generated by ZIZO comprising of the abbreviations of the relevant Division / Department and Workflow.

GAF parameters can be set at 800 x 600 pixels, but can be sized to include high resolution at 1024 x 768 pixels if required, the rule is to use the format that your hardware, software and network can support!

If the information contained is large then grow the image VERTICALLY, the print option generates a print screen from the 'home' position.

To access a GAF if you know its key number, type it in omitting the dashes and select the search button.

### Procedure

The icons as displayed on the Graphical access filter menu from left to right are explained as follows;

#### Select SAVE

To conduct a save whilst still keeping the file open. To save and exit select the OK button

To close the GAF without saving click once on the **X** button in the top right-hand corner of the screen, or Select the cancel button.

### NOTE

If the wallpaper graphic is deleted accidentally via explorer (from the flow directory), or there is no connection to the flow directory, the GAF objects will also be deleted, to reinstate, restore the graphic or if deleted then rename any graphic exactly the same as the file that was deleted, including the extension.

Flow directory can contain sub-directories for easy indexing.

### Importing a wallpaper Graphic

If you want to import a back ground image, click on the IN button

The IMPORT GRAPHIC FILTER window will appear.

Select the file (sourced from the flow directory)

A sneak preview window is available to ensure the correct graphic is being imported.

The details in the PREPARED BY and APPROVED BY boxes are auto entered based on the logged user's name and the associated committee as setup in DAS.

On completion press the Ok button to return to the previous window.

The image imported acts as a wallpaper or background for the filter.

**The flow gallery that appears is determined by the path in the ZIZO.INI file.**

GAFs are cascaded in the ZIZO read module and therefore consume memory,

always design the access path as shallow as possible avoiding numerous levels.

**HINT:** To speed up GAF deployment use the jpg compression format when creating the image in your graphic application, this reduces the file size significantly.

#### Drill downs - Procedure Link (Green)

This is the ZIZO built in Graphical Access Filter (GAF) or menu design facility to create drill down buttons to another procedure.

Select any green coloured icon from the first row by pointing and clicking on it once, and click on the OK button.

Locate using the mouse pointer, the (icon top left corner) position on the screen where the hot spot should appear and click once.

**NOTE:** The proc link number sequence is the 6000 series in the flowbmp directory.

**The total number of objects allowed on a GAF is 150**, if this number is exceeded then the GAF will not be saved and could go into error. An object counter is displayed on the GAF action bar.

#### Create a Procedure (Document) Link

A menu will appear after selecting the position of the hot spot, build a path to the procedure that the drill down must open by selecting a Division, Department, Work Flow and procedure/document.

The remote database option is only valid if external databases have been associated and linked.

Once the procedure has been selected, the hot spot will appear.

To move one or many objects use the joystick (see joystick for more information).

Security level, rate this link for viewer less than or equal to the security level.

#### Create a GAF Link

A menu will appear after selecting the position of the hot spot, build a path to the GAF that the drill down must be opened by, select a Division, Department and Work Flow.

The remote database option is only valid if external databases have been associated and linked.

Security level, rate this link for viewer less than or equal to the security level

#### Create an image link

This is the ZIZO built in Image Bank Linkage to create drill downs to an Image that is resident in the Image Bank.

Select any image link icon from the third row by pointing and clicking on it once.

Locate using the mouse pointer, the (icon centre) position on the screen where the hotspot should appear and click once.

Images should be either .bmp or .jpg extensions located in the images directory

A selection box will appear only after selecting the position of the

hot spot on the GAF.

Once the IMAGE has been selected, the hot spot will appear. To move the hot spot use the joystick.

Security level - rate this link for viewer less than or equal to the security level.

#### Create a transparent link

This option enables the cropping of an area on the GAF to be sensitised to drill down to various options including;

GAF links – A link to another GAF

Proc Links – A link to a document within the ZIZO system

App/OLE Link – A link to external data or application

URL Links – A link to a web address

Image Bank – A link to a graphic from the images directory

The cropped area is invisible in read mode. The user is notified by the cursor changing to a hand pointer on mouse over with information box displayed.

Not to be overlaid on drill down buttons or (hot spots).

#### Create an App /OLE link (Purple)

This is the ZIZO built in Graphical Access Filter (GAF) or menu facility to create drill downs to an external application.

Select any purple coloured icon by pointing and clicking on it once.

Locate using the mouse pointer position on the screen where the hotspot should appear and click once.

The OLE option is preferred as the client will access the file using whatever association has been setup on the local workstation.

OLE files must be located in the DATA/OLE directory for system portability, check the zizo.ini for data path.

The application (Applink) option should only be used for links to programs that use a common application directory that is the same for all users on their hard drive.

ZIZO Utilises DDE, Dynamic data exchange, this allows access to the linked file and the ability to display current information.

OLE works off file associations, so it is possible that on one client station a \*.doc would open MS Word and on another client, \*.doc could launch Word Perfect.

**IMPORTANT** – Long file names are supported however ensure the directory name is contiguous without spacing. Check if your networks supports long file names otherwise Limit naming to 8 characters.

The APP link will force the linked application to launch the file  
Certain applications have enhanced logic built in that can be evoked by using parameter settings, these will be called if included in the parameter field.

**NOTE:** The OLE Option Grey's out the application window as the file extension association automatically deploys the executable file.

#### Text dialogue

Select this option to place text on the screen.

A menu option appears prompting the user to select the Font, Pitch and colour.

Security level - rate this text for viewer less than or equal to the security level.

The 'Save as hotspot' box, if checked, will automatically sensitise the text. On the 'Select GAF or proc title selection' screen;

If the GAF Link button is checked, a GAF link is automatically created

If a specific document needs to be connected to a GAF, then 'this proc only' should be checked and the document is selected by clicking on it.

If the 'entire workflow' is selected then every document in the workflow will be placed under the mouse position on the GAF. Thereafter they may be moved to suit.

**HINT** Use the security level to hide text options that may be sensitive.

#### Show/hide ghost links

Select this radio button to display ghost links or hide them for easy screen maintenance

#### Select/deselect all objects

Press this button to select all the objects placed on the GAF, and by pressing it again all objects are de-selected. Selected objects have a green border and can be copied or moved en masse.

**HINT** To move certain objects only, select all, click on specific objects to de-select, the mass move will then ignore all de-selected objects.

#### Point out invalid objects

This option will by default deselect all objects then highlight any object that could potentially cause an error in the read module by highlighting the object with a red border. This could occur when an app/ole link has been broken due to the document file name or path changing

#### Copy / paste

Applies windows protocol however the objects selected can only be pasted into another GAF.

#### Edit text objects

Click on text object to be edited then select this button to edit the text.

#### Left align

To left align text objects, click on various text objects that are vertically placed that need alignment. The first object selected is the anchor and all other objects will align to the anchor. De-select object before continuing.



#### Delete

Any objected selected will be deleted when the 'trash' button is selected.

#### Header

If 'auto revision' GAF's option is checked in Global Parameters this feature cannot be edited manually. The revision date and number for the GAF and a brief narrative is provided for control. The OK button activates this and the date is acquired via the system date.

#### Joystick

The joystick allows the moving of selected objects.

The middle button allows the setting for the snap-to grid.

Right mouse click on the direction button, one click moves the objects as per the setting value, by pressing and holding the right mouse click, rollover the joystick direction buttons to change location.

#### Animate

If checked, the GAF opening sequence is animated.

#### Ok / Cancel

OK – validates all changes, saves the changes and applies document control

Cancel – reverts the document to its current without any change

#### Deleting a GAF

If the minus button is selected, the active GAF is deleted from the system and flagged for deletion in the database.

Version 5 provides the movement of objects on the GAF via click n drag

Animated GIFs can be added via the ghost option – objects tab - GIF animate and the display of dashboard dials – objects tab – GAF dials

ZIZO Systems International  
Training manual for Version 5.0 – **ADMINISTRATION MODULE**

<p><b>Screen</b></p>	
<p><b>Word processing</b></p>	
<p><b>Definition</b></p> <p>The processing of documents using either the default internal text editor or external applications like MSWord and Excel.</p>	

<p><b>Notes</b></p>	<p><b>Update Document s menu</b></p> <p>To navigate to the document to be edited select Division, Department, Workflow and a list of all the documents located under the workflow appear          To edit a document select the DOUBLE ARROW button.          To delete a procedure select the MINUS button.          To Add a NEW document select the PLUS button and ZIZO automatically appends the new document to the list.          If a document is selected prior to selecting the plus button, ZIZO will insert the new procedure above!  <b>EXAMPLE :</b> If procedure 300 is selected and the plus sign to add a new document is taken, ZIZO will insert a new procedure between 200 and 300 and number it 250.</p> <p><b>Level 3 editing</b></p> <p>The document-editing window displays the system generated document number on the top bar. If the numbering is correct then continue. Remember that as your system matures gaps in the numbering will occur as documents become obsolete, this has minimal impact as the number is really utilized by the system. The user tends to interact more with document titles via the GAF menus.</p> <p>ZIZO optimizes the screen in the read module and therefore text placement is not what-you-see-is-what-you-get or WYSIWYG when viewed via the ZIZO word processor, the print preview or MSWord icon will display the document as it will print. Tables are WYSIWYG and therefore if inserted into a document the right border should not exceed 18 cm if it is to appear in portrait.</p>
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## Word processing or LEVEL3 menu

The smart icons are explained;

- Clear** Deletes all content and associated links (destructive key)
- Header** Information banner that will appear when printing a document and cover page  
Select the Header details button and the HEADER DETAILS window will appear.  
Information printed on the Cover page:  
Reference Numbers, Revision Number, Effective Date, Prepared by, Approved by, and Revision Date.  
Information printed on each page of every document include;  
Header details in the HEADER 1 and 2 boxes - If any input is detected in these boxes then it will overwrite the global parameter settings and display the input only for that specific document. Input into box 2 only would then permit the global default for box 1 to blow through. Additional information includes: Procedure Number, Revision Number, Pages & Title Shelf Life settings are document specific and load the document either automatically into DAS or manually to the administrator once the date set matches the setup criteria in global parameters. Data entered into the header fields at document level, overwrites the system default.  
This is procedure specific. The header always displays blank even if global data is stored
- Read/Write** Pushing the button sets the document to either read or write enabled. If the no-entry symbol appears then the document appears 'frozen' via the read module. No manipulation of the text via the read module is permitted  
If the green tick appears then the document can be manipulated only while it is open.  
This can be used for the input of forms on-line, which is then to be printed or routed via DAS by-pass for filing. This promotes legibility, as handwritten information is often unclear.
- NOTE:** When the screen is refreshed the data input is cleared and the original template re-appears
- Attachments** The next four icons are related to enhancing the document by adding attachments, these could be in the following forms;
- Linkage** Linking one document to another  
Select the required Division, Department and Workflow you want to link to.  
A list of all the document numbers and titles will appear for selection and the number will automatically appear in the LINKED

PROC box.	<p>The next step is to give the link a NAME (13 characters alpha numeric) that has been used as a reference in the document EXAMPLE. if a reference in the document is made to Link 1, name the linkage Link 1.</p> <p>Colour coding helps to highlight all linkages.</p> <p>Insert a TITLE for the document, be as descriptive as possible as this field is accessed by the ZIZO search engine.</p> <p>If you are required to link to another database you will follow the above procedures and incorporate selection via the REMOTE DB link.</p> <p>Once you have completed the process press the Ok button and your link will be saved</p>
Image bank	<p>Displays all the graphics from the 'image' directory that can be attached to a procedure. This option promotes the concept of a many to one relationship making maintenance easy. EXAMPLE: Ten documents each contain reference to the same image, by linking ten documents to one image, if the image changes one change automatically updates ten linkages! Colour code text as per naming conventions to highlight</p>
GAF Link	<p>Works similarly to the linkage option however instead of linking to another document, this option opens a GAF in the read module</p>
OLE Link	<p>Same procedure as APP/OLE link in GAFs however the external application is called directly from a document and not a GAF.</p>
Allow text selection	<p>If normal then document appears via read module with mouse active cursor and all the printing and e-mail features. If the document restricts text selection (displayed with a no-entry sign) then the document can only be viewed via the read module with all options de-activated related to replication, these include no mouse activity for copy, printing and e-mail.</p> <p>HINT: Useful for confidential information</p>
Keywords	<p>This option allows alternative words to be associated to the document, used by the search engine.</p>
Linked to GAFs	<p>This button reveals a list of the GAF's the document is linked to and by placing the mouse pointer on a line displays the GAF details</p>
Spell checker	<p>Activates the spell checking option and allows a database of words to be added to the user's dictionary, this is located in the</p>

temporary directory on the local client machine.

**Change from DAS**

to level 3 colour The text colour as defined in global parameters depicting DAS changes will be changed to the text colour as defined as level3 or document editing.

**MS Office**

The MS Word and Excel icons are available for document editing using the features of these applications. When activated, a floating save menu returns the administrator to ZIZO and saves the file within the database.

**Change to XLS**

This option provides for the format change of the document type from RTF to XLS and retains the same document number therefore links made to this document will remain active

**Help**

(For future release - will link to this training manual)

**Save Exit**

This button saves all changes made and activates the document control functions including revision, change, archiving and amendment tracking

**Cancel throw away**

Terminates the current session with no effect on the data

**Word processing**

There are word processing features available for document maintenance within the ZIZO system. These features are accessed via the action bar and include;

- File – Save, export, print and spelling
- Edit – Undo, redo, cut, copy, paste, paste special, find, find next, replace, character case, insert page break, remove page break and select all
- Font – Includes style and size
- Paragraph – Borders, backgrounds, alignment, justification, bullets, numbering, word wrap, indents and line spacing
- Format – Background and fill colour
- Insert -- File, picture, line, hypertext link, align centre and symbol
- Table – Insert, delete, selection, align, borders, split, merge, grid and properties

**Show hyperlinks**

A list appears of all the hyperlinks contained in the document



#### Unlinked documents

Displays a list of all the documents that are not linked to a GAF. This list can easily be manipulated where needed by selecting all the rows and placing the content onto the clip board 'via control c'



#### Global search and replace

Criteria tab.

This function can be done globally (not recommended) or you can refine the search and replace to a certain area in the database.

EXAMPLE: if you want to replace the words RANDS with DOLLARS you can do this with the Global Search and Replace, however case sensitivity must be considered.

Select the word you want to replace (RANDS) and insert it in the 'search for' box. Then insert the word you want to replace it with (DOLLARS) in the 'replace with' box.

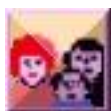
Once this has been completed press the Ok button to save the instruction.

This option must be run in a controlled environment i.e. per workflow, as the document formats could change effecting word wraps etc. Text in tables is excluded from this operation.

The user also has the option to search and replace using the options of Titles Only or Body of Document. The option to prompt the user before change is also available

Results tab

Displays the document being scanned with the search word appearing on the bottom line if 'prompt' option is checked.



#### Committees

A "New Documents" Committee must be formed with one member who is responsible only for the routing or assignment of new documents to the relevant committees for approval.

The "New Documents" Committee member is usually someone who has a broad understanding of the structure of the ZIZO database layout and is usually the ZIZO Administrator (A Level 1 user)

Committees should be numerous each containing few members, this helps to obtain quick turn around times when documents are routed to committees for approval.

Committees can be specific and therefore do not need a cross representation of members

A linked committee follows a consecutive approach towards gaining approval from various other committees. If there are two committees

namely Comm A and Comm B. Comm B (Escalation box is checked) is linked to Comm A then the work flow logic would be;  
All committee members are notified concurrently in Comm A  
Once approved the DAS request would escalate to Comm B  
**HINT** To make linked committees effective they normally contain only one member, this can form a daisy chain of approval.

A committee cannot be deleted if there are DAS requests in progress waiting for the committee.



#### Remote database link

Accessing a remote ZIZO database - for multiple database installations (FOR ADVANCED TRAINING) This option creates associations between zizo databases used for linking information between databases.

**Name** = the name of the DSN = the name of the remote database file include the protocol for the Db, ie. MS Access = NetBeui

**Database** = the DSN name of the remote database

**Remote Paths**=the paths to the remote GAF, images and player dirs.

**HINT** Ensure that WAN/LAN access is given to the remote database  
**Data Source Name (DSN)**

A list of DSN's that have been set up for the client using ODBC (a protocol used by ZIZO to communicate with the database) via the control panel. DSN's may be user or system specific, it is preferable to apply the system DSN as any user on the workstation would have access to the DSN.

**Graphic Access Filter (GAF) connection**

The path to the flow directory of the remote database for retrieval of GAF's (Only if Netbeui selected)

**Web or TCP/IP**

If Netbeui is NOT selected, then insert the server path to the "Flow" directory in the TCP/IP box or if information is to be retrieved from a web server, insert the URL eg. http:// etc..

**TO BE COVERED IN ADVANCED TRAINING IF REQUIRED**

**Image Bank**

Select the path to the directory containing all the remote database's images, normally the Images directory only active if Netbeui option taken

**Web or TCP/IP**

If Netbeui is NOT selected, then insert the server path to the "Images" directory in the TCP/IP box or if information is to be retrieved from a web server, insert the URL eg. http:// etc..

**Image Player – (Not used) TO BE COVERED IN ADVANCED TRAINING IF REQUIRED**



#### Image bank

Linking pictures to a document

On selecting the Image Bank button the IMAGE BANK UPDATE window will appear.

Select the Division, Department and Workflow.

Then select the procedure in that Workflow and either ADD, UPDATE or DELETE.

If you select ADD or UPDATE a further window will open.

Select an image from the image bank, the files depicted are sourced from the 'images' path in the ZIZO.INI file. (recommended formats are bmp and jpg) For housekeeping, subdirectories can be created off the images directory for storing images relating to a logical file naming convention.

You can view a thumbnail in the SNEAK PREVIEW box.

Once this has been completed you have to name the image in the NAME box and then press the Ok button to accept this instruction.

Keep names short due to character length limitations. (13 alpha numeric)



#### DAS – Document Approval System

This feature allows the relationship between committee and area of the database to be matched. Either a Division/Department/Workflow/Document is matched to a Committee.

**NOTE** THE SYSTEMS WORKS FROM THE BOTTOM UP, IN ITS SEARCH FOR A COMMITTEE.

This means that a committee assigned to a document would have priority over the committee assigned at divisional level.

**HINT** Do not assign to levels lower than department, as assignments become exponential making administration difficult. Make document assignment by exception rather than the rule!

#### THE DAS CYCLE

- a) A committee is created
- b) User/s joins a committee
- c) The committee is assigned to a section of the database
- d) A committee is created for new data designation and associated to the system generated [new] committee. The ZIZO Administrator is the ONLY member of this committee (Can only be one person who is responsible for directing new documents logged onto the system to the correct committee)

At this point the DAS is now ready for operation

#### TESTING THE DAS

- a) A user presses the DAS icon from the read module whilst reading a document that needs to be edited.
- b) The DAS loads a duplicate document for editing and the default text colour is visible highlighting the change
- c) A reason and motivation for the change is entered and the option to save a draft DAS request (to continue working on the document at a later stage) or log the



- request is made. Once logged a copy can be stored to a directory of choice and a DAS case number is generated for later enquiry.
- d) The system routes the DAS case to a committee that is assigned to either the document/workflow/department or division (in this order).
  - e) Committee members are prompted concurrently of the outstanding case number for action.
  - f) The case is either accepted or rejected by each committee member, if rejected then a reason must be given
  - g) A case can only be accepted if ALL members approve, if one member rejects then the case is routed to the person who originally logged it and the cycle repeats.
  - h) Once accepted the approved DAS displays when logging onto the Administration module.
  - i) The approved DAS menu is opened and the DAS icon is selected to view the members comments (each comment must be checked in the acceptance box) and the document is edited to contain the change. Colour coding is selected via the change colours icon, this button changes the DAS text to the 'change' text or RED colour automatically.
  - j) The 'bypass' button is selected if the DAS is used for 'on-line forms' as this function allows the document to be archived without changing the live document.
  - k) The document is saved by the OK button and if amendment tracking is switched ON then a prompt for input about the change is required and the DAS case number can be used for reference.
  - l) If the document prompt option is switched ON in global parameters then users who have access to this document will be prompted of the change when logging onto the ZIZO read module. Reading the changed information can be tracked via the user's log files and reports.

**NOTE:**

If a user is NOT prompted and has access to the document, it could be as a result of their 'prompt' setting in update users, set to ignore.

Tracking of DAS cases is done via the DAS status enquiry

New documents can be added to ZIZO from the main read screen via the DAS icon. When added these documents are routed to the ZIZO Administrator who then assigns the document when prompted to a committee and the DAS process continues thereafter



**Open DAS cases**

The DAS enquiry provides a summary of all the DAS cases and their status. Closed cases can be purged from the system via the utility module  
All cases can be viewed and exported via HTML or RTF



### Project Maintenance

Projects can be created, given names and people assigned. A blueprint template can be selected and used for a project. When a Project is maintained, the blueprint is visible and by selecting either an Index or Index element, the related GAF can be viewed. Projects can be closed and deleted.



### Project Blueprint Maintenance

A Blueprint is a structure that can be assigned to a project avoiding the repetitious task of creating a series of GAF's each time a new project is formed. The blueprint is the index of the project containing elements per index record.

#### EXAMPLE:

Index = lists the high level document classification;

- Pre-contract
- User requirements
- Tender
- Evaluation
- Launch
- Operative
- Hand over

Index = Tender

Index elements = contains document classifications related to the tender process

- Tender committee
- Tendering method
- Legal

Documents captured via the launch pad are assigned to either the Index or Index Element and ZIZO auto-creates the entry onto the GAF.



### Project Classification

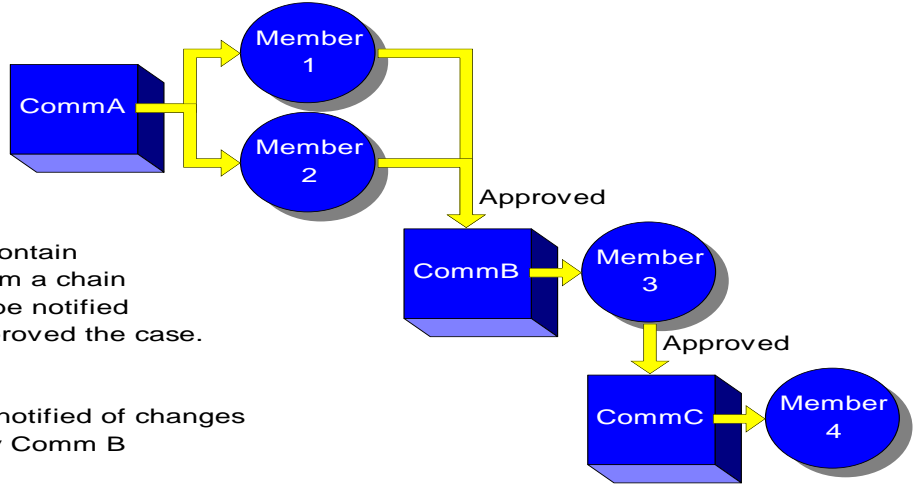
Classifications can be created and deleted.

They cannot be maintained or changed as this would affect data in progress.

The classification is used as a quick look-up feature for finding a project within a certain category via the librarian

**LINKED COMMITTEES CASE STUDY**

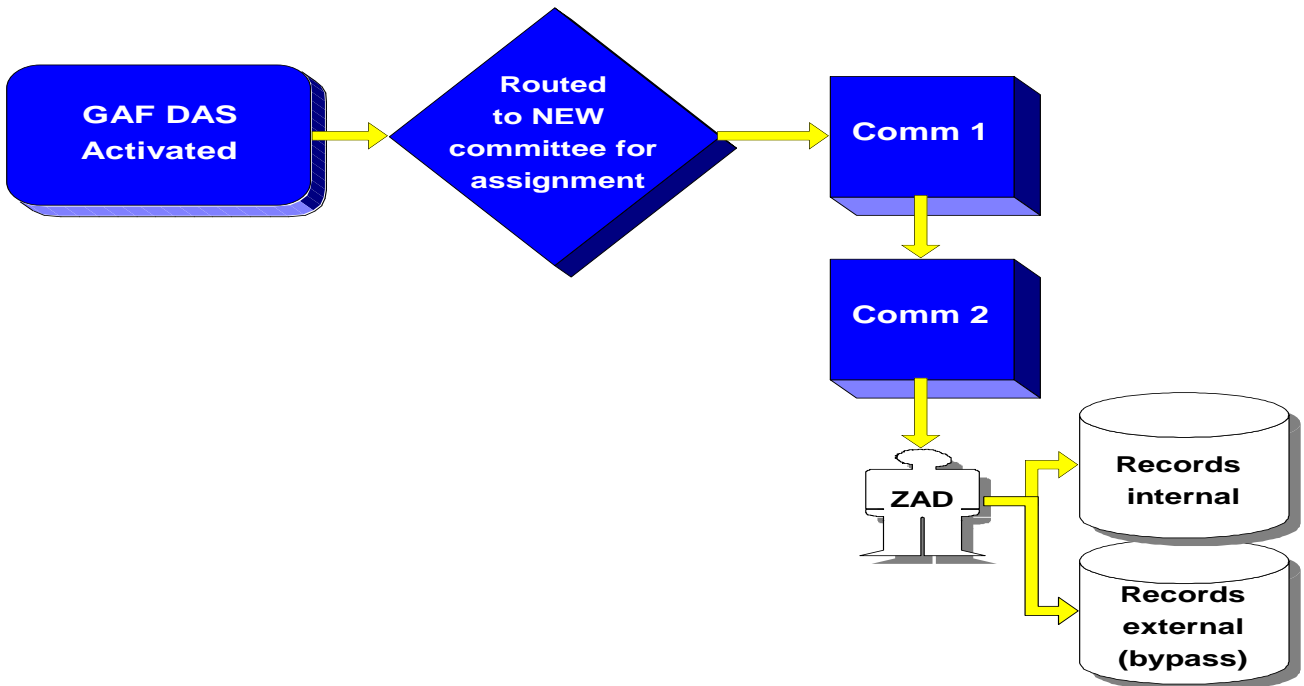
Concurrent DAS notifies all members at the same time



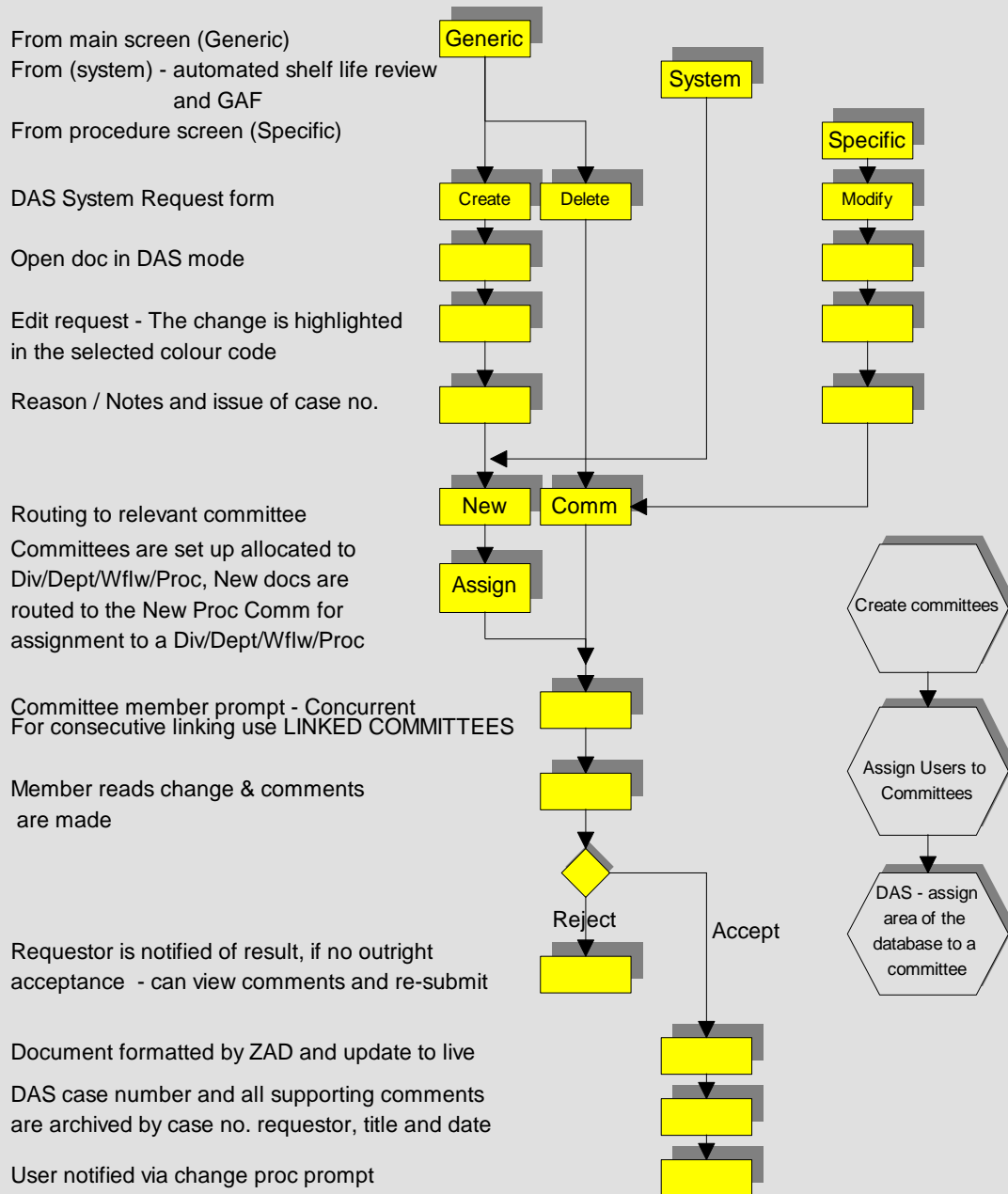
Linked committees should contain single members and can form a chain of approval. Member 3 will be notified only when Comm A has approved the case.

Member 4 only wants to be notified of changes that have been approved by Comm B

**GAF DAS CASE STUDY**



### DAS PROCESS

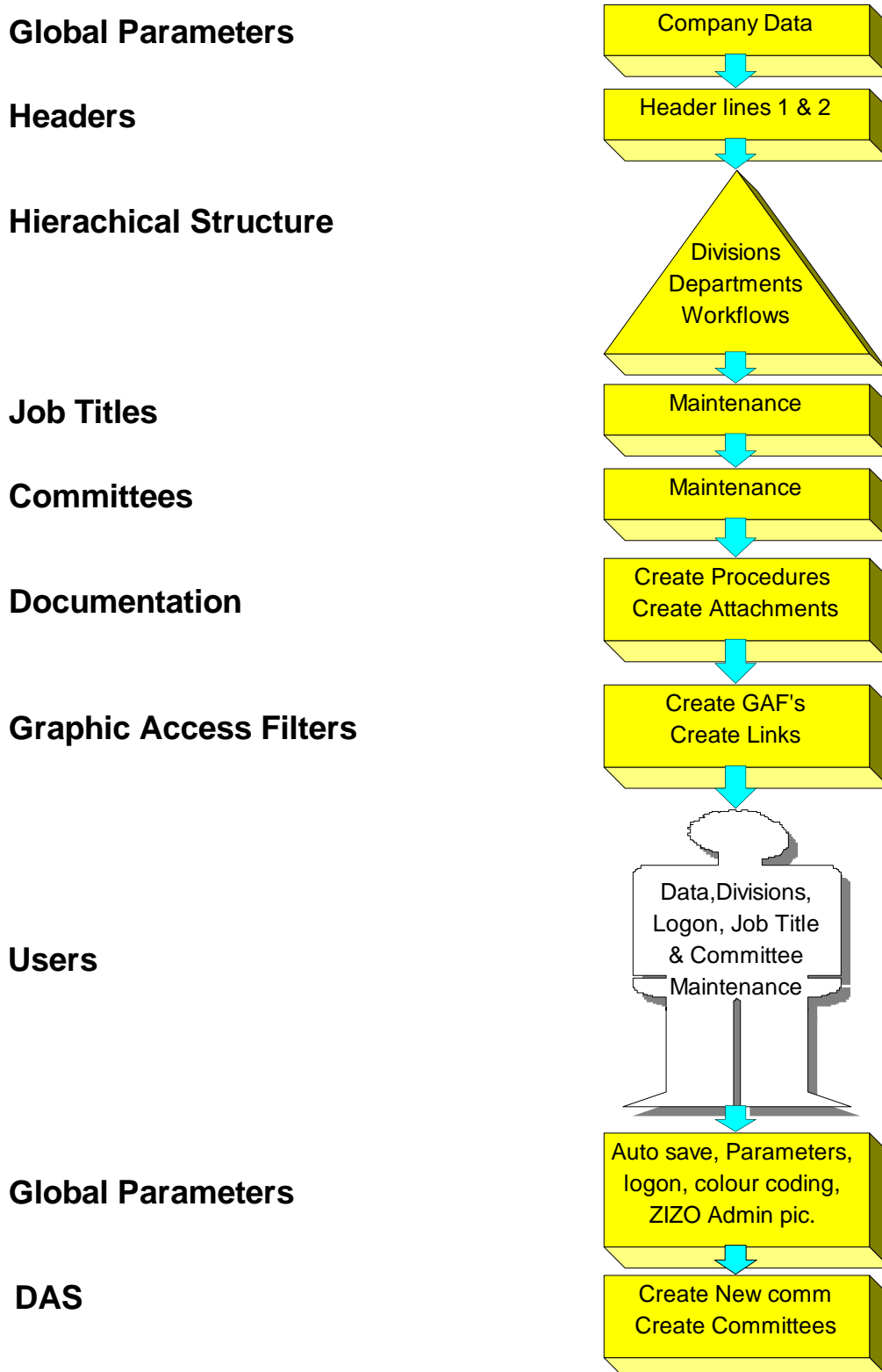


#### GOLDEN RULES

DAS will not function without a NEW procedures or document committee. The NEW committee may only have ONE member, who's function is to assign NEW requests to the relevant workflow. Committees now become virtual cyber committees not requiring many members in order to get resolve on issues. The turn-around time for decision making is proportionate to the number of committee members. Ideally 1 - 2 member committees promote quick results. Have many committees with few members !!

ZIZO scans for committees using a bottom up approach, therefore an assignment to proc level would override an assignment to Dept or Wflw level within a Division.

## ZIZO - SETTING UP THE SYSTEM



## **ZIZO TERMINOLOGY**

Level 1	Read/admin module high level screen (with the zizo logo.)
Level 2	GAF level
Level 3	Document level
Procedure	A document
GAF	Graphic access filter.
Hot spots	In a GAF there are various types of drill downs such as proc links, GAF links, app/ole links, Image links and BOD via transparent URL links.
BOD	Browser on Demand launches a browser when a URL is detected.
Linkage	A cross reference from one document to another document
DAS	Document Approval System
RTF	Rich Text Format, the document format used for importing.
DSN	Data Source Name - Used to identify the database in the ZIZO.ini and ODBC setup.
ODBC	A protocol used by ZIZO to communicate with the database.
ZIZOLite	The option of running a thick client with on-line version control
Sync	The mirroring of the primary database with a secondary database
Librarian	A quick entry process of getting information into ZIZO via a launch pad

## **ZIZO TREE STRUCTURE**

ZIZO - Applications Directory (Where ZIZO.INI file is located) The ZIZO ini editor or ZINIEditor should be used to guide the administrator and assist with the setup of the zizo.ini file that contains all the path statements used by the system.

The zizo.ini file is the road map that joins all the supporting directories.

## **ZIZO UTILITIES**

The ZIZO Utilities or Zutils module is woven into the administration module and contains an array of features for maintaining and resetting various subsystems. Please contact ZSI and instructions will be given on how to access this module.

NOTE: The Zutils interacts directly with the database and therefore a user lacking the know-how of the system, can cause potential damage by deleting or resetting critical systems.

## **Technical**

ZIZO is written in Delphi and is a client/server application

The program can be scaled from thin to thick client thereby optimizing bandwidth available and by utilizing the ZIZOLite feature, slow connections can function with the data locally and only using the WAN connection for verification and synchronisation.

The program can be web-abled via the Citrix n-fuse platform.

ZIZO comes shipped with a run time version of MS Access as its database.

ZIZO incorporates a protocol called ODBC that allows it to communicate with the

SQL server database, ideal for larger installations.

Client workstation minimum = Windows 2000 SP 3 or XP and MSOffice 2000, the processor should be a Pentium with minimum 256 Meg RAM. (Administrators must have 512 Meg RAM to run graphic applications concurrently when designing GAF's etc)

If the system behaves erratically, cannot open GAF's or documents and displays access violations, these symptoms are due to a lack of either disk (as ZIZO writes temporary files to the virtual drive) or insufficient RAM.

ZIZO contains state of the art technology and to set clients up across a network is a breeze! Just point the client to the zread executable and the system performs an auto setup. Ensure adequate permissions and rights are assigned.

ZIZO auto detects the client's temporary file by using variables.

Documents are displayed in RTF (Rich Text Format) and can be exported and read by most word processors or text editors

Image preference is aimed at either JPG or BMP formats, however most of the common formats are supported

#### Features

Please refer to the website [zizosystems@yolasite.com](mailto:zizosystems@yolasite.com)

Go PENTA tab and view the history

ZSI

## **ZIZOLite**

Technology contained within the application that provides the ability to communicate over a WAN with limited bandwidth. This is attained by running a thick client and WAN use is restricted for verification calls only.

For example a client opens a document, the system verifies its revision number across the WAN and if the number equals the revision on the local database then the document is loaded locally and displayed, if however the revision is not current, then the 'live' document is loaded across the WAN creating a 'sync on demand' logic

## **ZIZOLite setup**

Setup ZIZO.INI and ZIZOSVR.INI.

We first read in ALL variables from the ZIZO.INI and convert where needed.

We need to convert LiteSQLName and PathShareName from the Windows System variables to give us the server name and SharePath.

We also get the DOS Start/End scripts, DBType and the Drive Letter to MAP.

Then we try and find ZIZOSVR.INI and if found, we load the DBType, Server Name and DOS Start/End scripts.

So, ALL is loaded first.

Then we execute the DOS start scripts.

If there was a DOS Start script in ZIZO.INI, we execute JUST that script and ignore the script in ZIZOSVR.INI.

If there was NOT a DOS Start script in ZIZO.INI, we look if there was a DOS Start script in ZIZOSVR.INI and run it if found.

Basically, if ZIZO.INI has a DOS script, ZIZOSVR.INI's DOS script is ignored.

Then, if we used the SharePath Windows environment setting and Map Drive setting, and the Windows environment setting was found, we build up a Drive Share for ZReadV4.exe to use.

Please ensure that if you use the SharePath Windows environment settings, that you DO NOT use the DOS Scripts for Mapping because it would duplicate the Network call and the 2<sup>nd</sup> mapping will fail, but the user will most probably not even know it.

OK, so that is the basics for Mapping etc.

Now for the true LITE version we utilize when a user logs on and is flagged as a REMOTE user.

We first need to determine if the Remote Database is SQL/Server or MS-Access.

So, if ZIZO.INI's Secondary database is MS-SQL Server OR the ZizoSVR.INI has "SQL/Server", the system knows that the LITE database is SQL Server and NOT MS-Access.

For SQL-Server:

If there was a Windows Environment ServerName specified, it will create a new DSN in ODBC Admin on this PC.

If there was NOT a Windows Environment ServerName specified, it will look at the ZIZOSVR.INI's variables to see if there was a Server Name and then use that servername to create a new DSN in ODBC Admin on this PC.

It then tries to connect using the DSN as it is currently in the ODBC Admin on this PC.

If it connects, program executes.

If it DOESN'T connect, then the following happens:

The assumption is made that the Windows Environment setting is NOW the problem.



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So, if there was NO ServerName found in ZizoSVR.INI, it will then prompt the user to TYPE in the Server Name on a pop-up screen.

If there was a server name specified, it will use this name

So, depending on the UserInput OR the ZizoSVR.INI's Servername being used, the system will create the DSN in ODBC Admin on this PC.

Then it tries to connect AGAIN.

If it connects, program executes.

If it doesn't connect, then it warns the user and SWITCH OFF this session for remote functionality. However, the next time this remote user wishes to log on, the process is repeated until he can connect successfully.

For MS-Access:

Access works a bit differently because we have more control. We also DO NOT USE the ZizoSVR.INI for MS-Access.

It will first look if the LOCAL directory called: C:\ZizoLite\ZizoDSN Name" exist.

If it does exist then we assume that ZizoLite was configured and the following will happen:

We try to connect.

If it connects, program executes.

If it DOESN'T connect, it will warn the User and it will SWITCH OFF Remote functionality, and then it will ask the user:

"This session was NOT configured for remote. Do you want to re-configure the next time you log in?"

If he chooses YES, the system will remove the C:\ZIZOLITE directory and he continues as a normal NON-REMOTE user.

(The next time he logs on, it will follow the rules to configure him because the C:\ZIZOLITE directory was removed.

Then, if the C:\ZizoLite\ZizoDSN Name" directory DOESN'T exist, the following will happen: The user gets prompted: "You are flagged as a remote User, but this PC is NOT configured correctly. Do you want to work as Remote?"

If he chooses NO, he becomes a normal NON-REMOTE user for this session.

If he chooses YES, it creates those Directories, copy the Access Database (MDB File) from the DataPath to the C:\ZizoLite\ZizoDSN Name" directory and creates the DSN name in the ODBC Admin.

We try to connect.

If it connects, program executes.

If it DOESN'T connect, it will warn the User and it will SWITCH OFF Remote functionality, and then it will ask the user:

"This session was NOT configured for remote. Do you want to re-configure the next time you log in?"

If he chooses YES, the system will remove the C:\ZIZOLITE directory and he continues as a normal NON-REMOTE user.

(The next time he logs on, it will follow the rules to configure him because the C:\ZIZOLITE directory was removed.

A few notes.

If the Primary Database is SQL/Server, then the Secondary LITE database can be either SQL/Server or MS-Access.

If the Primary Database is MS-Access, then the Secondary LITE database can ONLY be MS-Access.

Then the rules:

If the Primary Database is SQL/Server and the Secondary LITE database is SQL/Server, then the client MUST replicate the database from the Primary database to the Secondary LITE database. He can decide to replicate the FULL database or just the table structures.

If the Primary Database is SQL/Server and the Secondary LITE database is MS-Access, then the client MUST replicate the database from the Primary database to the Secondary LITE

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database. He can decide to replicate the FULL database or just the table structures. This Replicated Database MUST be stored in the DataPath as the "ZizoDSN".MDB.

If the Primary Database is MS-Access and the Secondary LITE database is MS-Access, then the client don't need to worry about anything because the full database will be copied over initially..

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Newly added, is the Createlcon value which can either be "Y" or "N", default being "N". This will enable the Creation of Icon's when the Primary database was not found and the system configures itself.

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Another change was made, where records are added into the Audit Log of everything while a remote user is logging in.

So basically you can logon as remote, and then in ZAdminV4 go and see what was used to login with.

So please note that ZIZOSVR.INI does NOT take preference.