Document Management
Jim2® Business Engine

Fact Sheet

Document Management in Jim2 Business Engine, is a game-changing feature that enables you to store and manage documents in Jim2, linked to jobs, CardFiles, stock, and much more.

Think of the brochures, product images, price lists, site photos, plans, user manuals, contracts and certificates you can house conveniently in Jim2.

Document Management is designed to help you to:

- Further centralise business information in one package.
- Find documents more efficiently by linking documents to related data.
- Improve collaboration, and streamline your document workflow.
- See consistency in action by distributing accurate, up-to-date versions of your documents from Jim2.
- Reduce administration time associated with managing documents in multiple locations.
- Securely store documents within your business.
- View documents wherever you are using Jim2 Mobile.
- Keep documents received from any source in the same place.

What is a Document?

A document can be a file in any format at all, including images, PDFs, Microsoft Office documents, etc. and can even include an external link to a file (URL/web link). In practice, business documents can be divided into standard 'company type' documents that support a wide range of customers and staff, or they are 'object-specific' documents that relate to a specific event, customer or thing.

Jim2 caters to these two very different uses with features that allow you to view all general documents in one place, and/or quickly find documents related to a job, order, customer, stock, and much more.

Jim2 Documents features a library of everything stored in Jim2. This is particularly useful for 'company type' documents. For example, brochures, price lists and forms available to staff.

Every document can also be linked to an object in Jim2, whether it be a piece of stock, a job, a quote, a customer or vendor. The type of documents can be a signed acceptance related to a specific quote, site photographs of a job, or user manual relating to a specific stock.
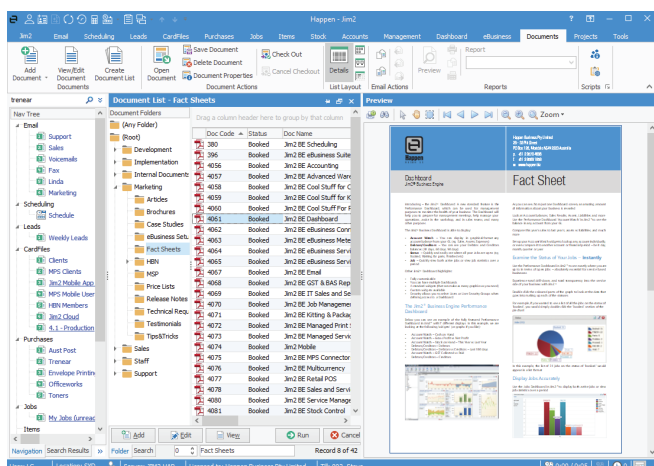
While these types of documents are also important, they include a default setting which temporarily hides them from general view in the Documents section of Jim2. Each document features a tick box labelled 'Hidden' which keeps these object-specific documents out of general view. This is a default setting to all object-specific documents.

Drag/Drop Functionality

There are a couple of quick ways to add documents to Jim2 to grow your repository. They include options to:

- Add one or more documents to Jim2 Documents resource.
- Add one or more documents to a specific record which is hidden from view in Jim2 Documents (default).

Simply select the document(s) to move to Jim2, then drag and drop into Jim2. Alternatively, add a file by making a selection to 'Add Document' from the Jim2 Ribbon to Jim2 Documents where the 'Open File' dialogue will appear. You can add multiple files at once using standard Windows CTRL or SHIFT + left mouse click to select the documents to add.

You can also link a new or existing document to a job, stock, order or CardFile by selecting to add a brand new document, or link an existing document in the Jim2 Library with the options found below.
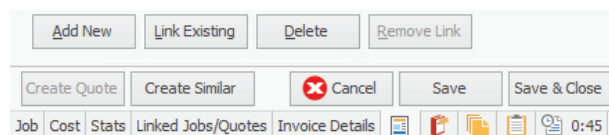
Here, you can also remove a link to a document, when required.

Linked Documents

The details of each linked document are found in the Documents tab of orders, jobs, customers, etc.

Document Folders

Documents folders display different categories of documents, grouped together. Create a folder structure which reflects how you use documents in everyday tasks. Perhaps have a folder for all user manuals, or marketing literature.

However you choose to structure your folders, it's important to know documents can only reside in one folder.
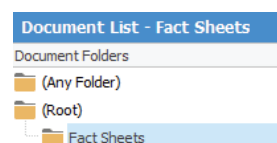
Jim2 Documents also features two additional standard folders to all users. The 'Root' folder shows documents not assigned to a folder. Documents can be dragged from this list into a folder of your choice.

The 'Any Folder' includes a repository of all documents stored in Jim2, regardless of their folder. You can even see all hidden documents by selecting 'Show Hidden' from the Ribbon.

Managing Documents

Need to easily reorganise documents between folders? Need to delete multiple documents? You can select multiple documents at once by using the standard Windows CTRL or SHIFT + left mouse click to select the documents you want to drag/drop into an alternate folder to delete in Jim2.

Document Lists

A key organisational tool of Jim2, document lists are based on your Documents folders. Lists enable you to look at a list of documents with a common purpose. It helps you to keep track of your most important and frequently needed documents by pinning the lists to your Nav Tree. This helps you to quickly access these documents during your everyday tasks. For example, sales staff can run a 'Brochures' list to see all the marketing documents relating to your products and services that are stored in Jim2, without the hassle of clicking through many folders to find them.
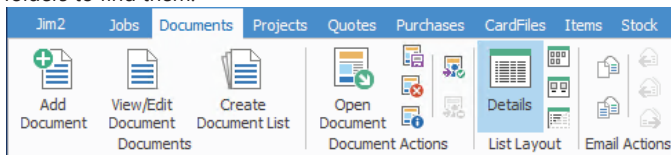
When looking at a list of documents, you can move between different views, including Folder View or Search View. Regardless of the view you select, you can also select a layout of Details list, Medium Icons and Large Icons from the Jim2 Ribbon.

Each document is shown in a preview panel located on the right-hand side of the Jim2 desktop. This is also available when looking at documents in a Job, Order, or CardFile, etc.

Version Control

Complete control and tracking to maintain versions of documents, with functionality to 'Check out' a document and 'Check in' the updated version. Check in functionality allows you to keep an audit trail identifying staff, time stamp and notes, which gives users insight into the updates and changes. A perfect solution where a formal document management system is required (ISO 9000, for example). Jim2 keeps a running history of document versions up to the last 10 (default setting) which means staff always communicate the latest copy, and past copies are readily available to view.

Document 'status' lets everyone know where the document is at. Booked, Cancel, Check out and Finish indicate to all staff if the document is being amended, that the document is checked out for editing. A document 'Check out' can be cancelled by the user during the update process or another user with security to do so can 'steal' the 'Check Out' lock. Status can be added via Tools.

Tags, Categories and Usage

You can add a number of elements to categorise and further define a document. There are a number of labelling settings available in Jim2:

- Assign tags to further define the document – perhaps the language a user manual is written in, or the year the document was published. Documents can have multiple tags.

- Add categories to further define the type of document, for example, what type of document it is: a plan, contract or article. Documents can only have one category.

- Label a document's usage. There are three options to identify a document's purpose – 'Signed Document' which has been signed by a customer; 'Signature' to identify a staff's signature if you wish to add their approval to their work; and 'Image' which can pinpoint an image of, say, stock to be displayed on your website.

Duplicate Documents

Jim2 identifies and flags duplicate documents when an identical copy is already stored in Jim2, giving you choices on whether you want to replace, add a new version, or use existing.

Security

Users potentially have the ability to view, edit and delete documents. Jim2 lets you set document security at a security group level and also at a document level, with security group settings taking precedence.

The ability to add, edit, view and amend overall document security is handled via the Jim2 traditional security. By default, only users with administration rights have this ability. Users can also 'steal locks' and document security where authorised.

At a Document level, security to view, edit or delete a specific document can also be set for everyone, specific security groups, or specific users. If a user or security group does not have the rights to view a document, that document will not be visible to them in any way. This applies equally to their ability to edit or delete. For example, staff leave forms can include security groups' ability to view the document, but the individual document can have view authorised for the individual staff and payroll/HR staff.

When adding a document, the default security settings will be applied. These can be overridden by authorised users at point of adding the document, or at a later date by clicking the document's security tab.

Email Documents

Adding documents to email is seamless with Jim2. You have the option to select a document from Jim2 to send it as an attachment, or you can select a document in Jim2 which is preset to 'Email as Link'. This document is included as a hyperlink which includes its URL pointing to an external copy of that file, ready for the recipient to download. Adding a hyperlink reduces the size of your email, the size of your Jim2 database and the chance of the email being flagged as spam.

Functionality to attach a document from your network or computer still exists, however with everything in Jim2 this action will be far less frequent.

Jim2 keeps track of how many times a document is emailed via a tally. This helps you to easily identify popular and frequently used documents.

And adding documents from an email to Jim2 is just as easy. Simply drag and drop a document from an email to the job, order, or purchase order it relates to, then link, and save it direcly to the object in Jim2.

Documents on Jim2 Mobile

All documents are also accessible from Jim2 Mobile, the versatile mobile app giving you anywhere access to Jim2. Staff can find documents linked to the job at hand, the order they're discussing, or by running a Document list.

Signable Reports in Jim2 Mobile means staff can record a client's signature directly to a signable report, such as a quote acceptance, on Jim2 Mobile, and store the signed acceptance to the quote instantly in Jim2.

Before leaving the customer, your staff can also quickly send them their very own copy of the signed quote acceptance by email or AirDrop.