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## User Interface and Security Jim2® Business Engine

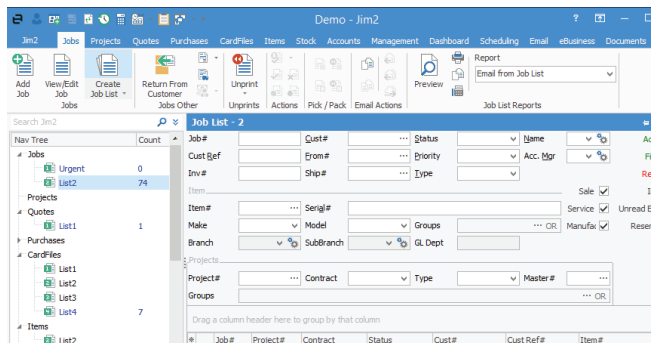
# Fact Sheet

Jim2 Business Engine is a Windows-based application with a clean, flat look that uses point-and-click navigation. Jim2 works by activating forms for specific data entry, to create 'lists' of forms, and to start/stop specific functions.

There is no need to close out of one function or active area in Jim2 in order to enter another – simply navigate to your chosen function using any of the following general navigation methods, and it will appear in the Jim2 **Workspace**. The Jim2 Workspace includes:

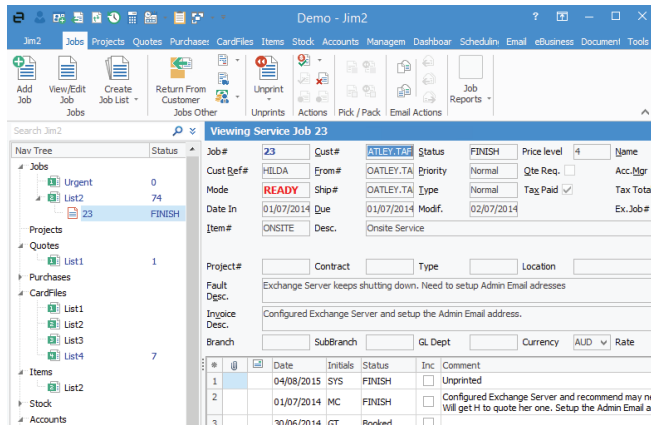
- **The Ribbon** containing Jim2 Object headings and icons.
- **The Navigation Tree** which graphically represents each object form or list in use (to the left of the screen).
- **The Menu**. The Jim2 pull down menu list, accessed in the top bar of the screen.

The appearance of Jim2 adapts (resizes) to suit the resolution of the screen you are working on.



Active forms and lists (objects) open into view within the Jim2 workspace. Multiple active forms and lists 'stack' on the workspace, with the most current on top. Forms and lists can be left on the workspace, or 'closed' with a mouse-click.

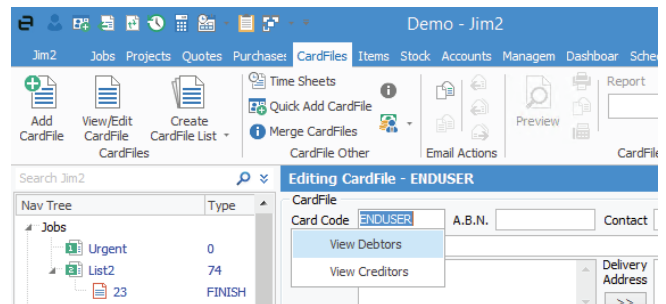
All open objects have an associated identity code, which is displayed in the Navigation Tree – simply click the reference to show the object in your workspace.



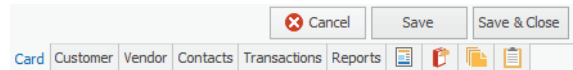
## Object Specific Controls

In addition to the general navigation methods, Jim2 Business Engine also includes **object-specific controls**:

- **Ribbon Buttons** – 'context sensitive' to the function in view.
- **Toggle** between the 'expanded' or 'reduced' object **form view**.
- **Hyperlinks**, form **tabs** and form **buttons**.
- **Keyboard shortcuts**.

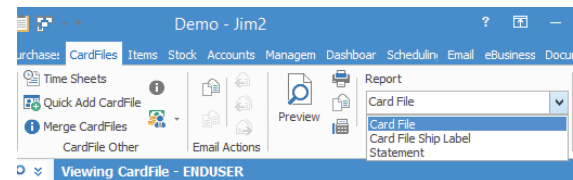


- **Object tabs** helping you to navigate between Documents, Comments, Emails, Watchouts, Notes, Tasks and Labour information. These tabs are object specific and located at the bottom of the Jim2 Workspace.



To automate as many functions as possible, and reduce user input, Jim2 includes many features to help you navigate Jim2, such as:

- Global, workstation and user sensitive **defaults**.
- **Intuitive type** (as you start to type, Jim2 will start to pre-empt your entry).
- **'Drag-and-Drop'** sorting and organising.
- **Cut, copy, paste** text.
- **'Create Similar'** functions.
- Standard Windows print menu options (with **context sensitive reports**).
- **Online Help** (F1 function key).



## 'Follow Me' Desktop

The Jim2 Business Engine 'Follow me' desktop feature ensures that Jim2 will follow you around the network. If you change workstations, logging on will bring up your previous active desktop, using your security settings – including the live navigation tree you had open in your last session. This will of course reduce the need to reactivate open forms, lists, or reports when you log in on the next workstation. If you log in to Jim2 Mobile, you can also find everything you're working on from your iOS device.

## Lists

The 'list' is a very powerful search function within Jim2. It is also one of the easiest features to master, and the most practical way of viewing and searching information.

The list collates information from your Job, Quote, Purchase, CardFile, Item, Stock, Project, Email and Documents in real time for cross reference (and uses archived data if required).

- Lists are used to create a real time 'snapshot' of what is going on in the workflow.
- Users can manage their own workload by creating and naming lists that apply to their job function. For example, your administration staff can generate a list of all finished jobs that require invoicing by creating a list of Jobs with the status of 'Finish'.
- Lists are defined using criteria, then 'run' to give a result. They can then be 'cancelled' once you have finished with them.
- Lists in use will show in the navigation tree, identified numerically in the order in which they were opened (eg. Job List 1, Job List 2, etc.) or by the name they have been saved as (eg. Job Parts List). A saved list is called a 'Pinned List'.
- Reports are able to be created from each list. These reports only reference list content, ensuring relevance.

### Pinned Lists

- Lists can be 'pinned' to stop them being closed inadvertently.
- Pinned Lists can be set to run 'live' in the Nav Tree, which means they refresh at regular intervals as object forms are updated across the network. The rate at which they refresh can be set to anywhere between 1 and 60 minutes.
- Pinned Lists display in blue and include an object count in the Nav Tree.

### Reorder Lists

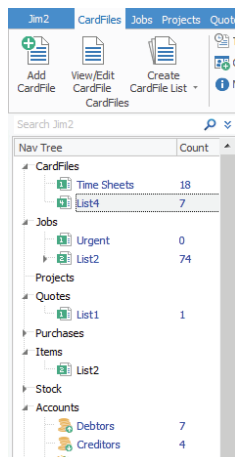
- All lists, pinned or unpinned, can be reordered by dragging the lists into a new order. For example, a Job Parts List and a Booked Jobs List can be rearranged to now show the Booked Jobs List first, followed by Job Parts List.
- Objects found in a list can now be moved out of lists and drag/drop to the Nav Tree.

### Search Lists

- Lists are used to find information using combinations of fixed and fluid search criteria (such as, 'between these dates' or 'last month'). You can search by one field, or any combination of criteria.
- Jim2 lists also allow you to exclude criteria from searches to create lists that do not contain certain information – for example, search for all Jobs except ones belonging to this customer.
- Lists can also be used to collect data from all records (past and present).
- All the lists within Jim2 have different fields for searching by, dependent upon which object this list relates to.
- The 'Advanced List' has many more detailed search fields available to help users locate a specific document or group of documents.

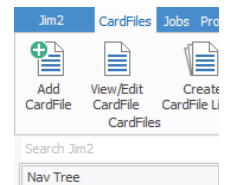
### Sort Lists

- The list result can be sorted using drag/drop column sorting, or ascending/descending sort.
- Each column can be deleted from the table to only the most relevant details.
- Users are able to right-click to drill down in list results.
- Find a specific record by selecting a field and typing the entry you wish to find. For example, select a name from a list and start typing Happen to find Happen Business.



## Search

Perform a search for a record at any time, using Search Jim2. You can search for a name, phone number, stock – anything you choose.



## Security

**Security Groups** are tailored to suit employee work descriptions within your organisation.

User Group Categories and Tags sort staff into departments and roles. Enable jobs and quotes to be allocated to a User Group, rather than individual staff. Great for updating Items when a new staff member joins, moves to a new role, or moves on.

**Report Groups** are assigned within each Security Group to grant or restrict access to object-specific reports. Each report in Jim2 is assigned a report level between 1 and 10. Members of a Security Group with a lower report level (1) cannot access reports with a higher report level (10).

**Status** can also be assigned level 1-10. Members of a Security Group with a lower status security level (1) cannot change status to one with a higher security level (10).

**Price Break Movement Down** allows you to control which staff can give which discounts. These discounts are unit/volume/quantity price breaks, set for each customer price level. It ranges from -1 to 4. Minus 1 allows discounting across all price breaks in the matrix. Level 0 allows no movement outside the set matrix. Level 1 is one jump (forward or backward) in the price break matrix, level 2 is two jumps (forward or backward) in the price break matrix.

## Personalise Jim2

### Database Colours

Running Jim2 in more than one business? Or, want your software to match your brand's colour scheme? Why not personalise Jim2 by changing the skin colour and accent of each database to help you differentiate between them. Select from a range of new skins and accents to differentiate between your main Jim2 database and even the Training database. This is set in **Jim2 Options > General**.

### Jim2 Ribbon

Move each object found in the Jim2 Ribbon into an order of your choice. Perhaps you use Email and Quotes on a regular basis, but not Jobs or Purchases. Select an object, like Email, in the Jim2 Nav Tree and drag it to the top of the Nav Tree. The ability to reorder the Jim2 Ribbon makes the areas of Jim2 that you use the most more easily accessible. This is set at a User level meaning Jim2 on your desktop can be in a different order to another staff member.

### Rename Jim2 Objects

Label the Jim2 Ribbon with terminology that's specific to your business. For example, rename Jobs to Orders, or Quotes to Leads or Opportunities to personalise Jim2 to match roles and team functions specific to each business' operations. This is available in **Tools > Options** and change the names of Job, Project, Quote and Items. This is a global setting for all users.

See also: Workflow Fact Sheet  
Reports Fact Sheet

