



Happen Business Pty Limited
 29 - 33 Pitt Street
 PO Box 126, Mortdale NSW 2223 Australia
 p. +61 2 9570 4696
 f. +61 2 8569 1858
 w. www.happen.biz

Workflow Jim2® Business Engine

Jim2® Business Engine is a **fully-integrated Business Workflow** application designed to manage all the workflow, reporting and financial requirements of companies involved in sales, service provision, distribution, manufacturing, or any combination of these.

Workflow (and systems), in the simplest terminology, **is the method or methods of doing, producing or organising something.** In a business, people operate within workflow, or develop and manage workflow systems and processes. The series of actions impact on productivity and ultimately financial outcomes.

Core to the Jim2® offering is **workflow monitoring.** Using **real-time** definable STATUS and LISTS, the progress of each task within your organisation can be monitored and measured to benchmark efficiencies.

Jim2® reports the **'who, where, how, at what real cost plus what to do next'** with real-time information, reporting live from your business workflow.

Live Drill-down Workflow Overviews

- Staff and management can create and label their own lists (of sales, service, manufacturing, stock, purchases, quotes, debtors, creditors) to monitor and work from.
- Mouse-click drill down to individual sales, service and manufacturing orders, purchases, quotes, debtor and creditor records to view or edit.
- Jim2® includes 'live lists' that can be set to refresh at specified intervals, so users can keep an eye on operations as they change status.
- Drag-and-drop column sorting makes it easy to define your preferred views.
- 'Pin' lists in place to stop them being closed inadvertently.

Job#	Status Time	Status Date	Cust#	Cust Ref#	Date Due	ItemDesc	Item
+ Status : Booked (COUNT=26)							
+ Status : Burn In (COUNT=2)							
+ Status : FINISH (COUNT=14)							
+ Status : Parts (COUNT=3)							
+ Status : Problem (COUNT=4)							
+ Status : Proceed (COUNT=1)							
+ Status : RAI.NR (COUNT=4)							
- Status : Wait (COUNT=5)							
38			DAYCOM	101	09/07/2004	VGA Monitor	MON
39			DAYCOM	101	09/07/2004	VGA Monitor	MON
40			DAYCOM	101	09/07/2004	VGA Monitor	MON
56			MODEM.COM	130	14/07/2004	Tiger 56K Modem	MOD
101			ADV.KNOW				

Fact Sheet

Productivity Reporting

- Use Jim2® Lists to give you a broad view of all work in progress, or use filters to narrow your view, for example you could list only service jobs in progress.
- Sort sales, service and manufacturing lists by 'Due Date' or 'Status Due Date' to check performance (overdue will be listed in red) and drill down to check who's done what and why.
- Identify business process bottlenecks or improvements using real data – rather than making assumptions.
- The Jim2® 'Follow Me' desktop feature means your staff can log in and work from any workstation in your network with their own desktop views and security intact. Automatic Jim2® log off (after x minutes of inactivity) can be set at a workstation level.

Live Management Information

- Live drill down workflow overviews using lists shows exactly what's going on, for whom, being done by whom and when it's due.
- Comprehensive drill down Sales Register shows all completed invoices for any given period and their value.
- Detailed (individual) Sales, Service, Manufacturing Profit and Project Profit (list of Jobs) reports.
- Detailed productivity reporting for any given period.
- Live Profit and Loss by branch, sub-branch and GL department.
- Comparison reporting against budgets by branch, sub-branch and GL department.

Job Profit

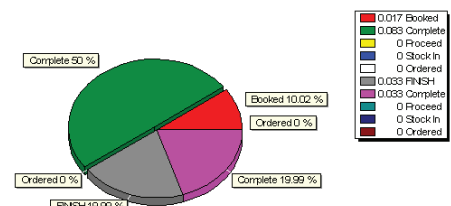
Job# 26958	Cust#: HAPP	Tax Paid: <input checked="" type="checkbox"/>
Date In: 14/04/2005	Inv No: 114084	Job Type: Service
Date Out: 14/04/2005	Name: John Watkins	Status: FINISH

Stock Code	Description	Unit	Value Sold	Cost	Profit
Stock					
A200721400	Targus Lappac 5 Laptop Bag	UNIT	71.8182	48.05	\$23.77
A200769000	Warranty Toshiba TFT 3 Year	UNIT	271.8182	224.00	\$47.82
A200777400	Toshiba Tecra A2 P-M 1.5Ghz Notebook	UNIT	2250.0000	2025.00	\$225.00
	Win XP Pro				
A505058510	Mouse MS Basic Optical OEM	UNIT	18.1818	13.7545	\$4.43
C920808300	Norton Internet Security 2005	UNIT	135.4545	98.78	\$36.67
K1131408000	Stapler Rapid StandUp Cobra Blue	UNIT	12.6818	8.78	\$3.90
K1142640000	Staples Rapid 26/6 Box 5000	UNIT	2.4091	1.52	\$0.89
			\$2,762.36	\$2,419.88	\$342.48

Actual Labour Hours

Labour type	Hours
Research	0.6667
Sales	0.5
Workshop	2.5
	3.67 (3:40)

Time Analysis By Status



Actual vs. Billable Labour Tracking

- Because you can define your own labour types (travel, onsite, research, workshop) the Labour Grid builds real statistics on what's **really** involved in a given task, to help you set selling prices more realistically.
- Use Management Reports to give you Actual Labour recorded for any given period, for any staff members.
- Set a realistic, generalised cost on each different labour type you sell and use Profit Reporting to give you a true performance picture – without affecting the GL.
- Actual labour recorded does not automatically enter the (stock) billing grid – it's your choice to add labour charges (or not!) to the Stock Grid for invoicing.

Process Start/ Stop Triggers

- Define STATUS (words) to describe the start/stop triggers in your workflow, using your common terminology.
- Status tables can be built for Sales, Service, Manufacturing, Quotes, Purchasing, Stock Transfers, Returns (inward/outward), Stock Adjustments, Cheques and General Journals. The database is supplied with appropriate status in each category to get you started.
- The Status Table you build includes 'who' is responsible for an action, and a brief description of the action required, for example if Job Status = Call, then call the customer to get a decision from them. The Status Table then becomes an invaluable reference or training guide for your staff.
- Each Status can be set a benchmark 'due time' – that is, should a Job stay on the status of Call for more than 4 hours, it becomes 'overdue'.
- Status can also be set to a strict workflow – that is, users can only move from status A to status B, not straight to status C. This functionality is perfect for high-volume distribution companies using the 'Pick' then 'Packed' then 'Ready to Invoice' status changes to monitor warehouse movements and productivity.
- Because Jim2® can use 'programmable event scripting', triggers such as status change can be used to 'trigger' an event, such as sending a report to a client, sending a message to a pager, and so on.
- The status of FINISH indicates a process is complete, for example when a Job changes to FINISH it can be invoiced.

In Object	In List	Active	Status	Responsibility	Comments	Due Days	Due Hours	Due Mins	Sec. Level	Exclude from committed	Exclude from Benchmark	Publish Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Booked	Us	This is the default Status applied to a Job when first added. All Jobs begin with the Status. In the case of a Service Job, the Item to be serviced would be placed on the relevant person's "Booked" sheet. In the case of a Sales Job, the Job is ready to be picked.	0	4	0	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Call	Us	The Customer needs to be contacted to make or confirm a decision about the Job. Service Job - Typically the Job needs to be quoted.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CANCEL	Special	This Status is used internally by Jim2 when a Job is cancelled.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Checked	Us	This would be regarded as a qualified Booked. It's useful, especially when doing bulk servicing of the same Item, to have a quick pass through all Jobs, and group the Jobs by the related faults. A Junior technician who would perhaps fix the Jobs he/she could and mark the others as Checked would typically do this.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FINISH	Invoice	The final Status of successfully completed Jobs. Service Job - The Item has been repaired and fully tested. Sales Job - The Job has been picked/fulfilled and is now completed.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Info	Us	A Supplier related to this Item needs to be contacted or further technical information is required to assist the technician repairing this Item.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Install	Us	Currently in the process of the Jim2 implementation.				1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Automated Due Date/ Due Time

- Defaults can be set (globally) to calculate realistic turnaround (days and hours) for each new Job entered on your system. This sets the benchmark for your team to complete each Job.
- Your actual working hours are pre-set to ensure due date relates to your trading hours. Jim2® will then calculate an expected Due Date and Time using only valid trading hours.
- Each status can be set a 'due time' – that is, should a Job stay on that status for more than 4 hours, it becomes 'overdue'.
- Sort Job List by Due Date or Status Due Date to check performance (overdue Jobs will be listed in red).

Job#	Status	Cust#	Status Date	ItemDesc	Serial#
113	Booked	DAYCOM		Warranty of System	234
117	Booked	DAYCOM		Express Infra CDROM 52x	224JT8
118	Booked	OATLEY.TAF		Sale of Goods	
119	Booked	DAYCOM		Warranty of System	7674765
123	Booked	OATLEY.TAF		Sale of Goods	
125	Booked	CHECKERS		Sale of Goods	
127	Booked	ENDUSER		Sale of Goods	
135	Booked	HR		Sale of Goods	
87	Burn In	MODEM.COM	11/07/2005	Tiger 56K Modem	APP.103
88	Burn In	MODEM.COM	11/07/2005	Tiger 56K Modem	APP.110
132	Burn In	HR		Modem Tiger 56K External	
133	Burn In	HR		Onsite Service	
55	Call	MODEM.COM	11/07/2005	Tiger 56K Modem	AT.1528
68	Call	CHECKERS	11/07/2005	System Pentium	924578
89	Call	MODEM.COM	11/07/2005	Tiger 56K Modem	APP.140
140	Call	OATLEY.TAF		Modem Tiger 56K External	
141	Call	HR	11/07/2005	Modem Tiger 56K External	
23	FINISH	OATLEY.TAF		Onsite Service	

High Level, Definable Security

- Security level or access is identified by Security Groups. Each employee (user) belongs to one Security Group and only has the access rights to certain areas and functions within Jim2® that have been established for that Group.
- Security Groups are also identified with a Report Level. When reports are devised, they are identified by ascending Report Levels – the higher the number, the more sensitive company information it contains.
- Security Groups are also identified by their Status Level to limit status (Strict Workflow) movements.
- Security Groups are also given a Price Break Movement ranking to limit volume break discounting.

See also: User Interface Fact Sheet
Accounting Fact Sheet
Stock Control Fact Sheet
Jim2® Mobile and Happen Cloud Fact Sheet



©2012 Happen Business Pty Limited (ABN 78 097 893 573). All rights reserved. Jim2® is a registered trademark of Happen Business Pty Limited. All other brand and product names are trademarks or registered trademarks of their respective companies.

All our products are designed and developed in Australia. Visit www.happen.biz for further information on Jim2® Business Engine or contact Happen Business directly on +61 2 9570 4696.

www.happen.biz

