

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.

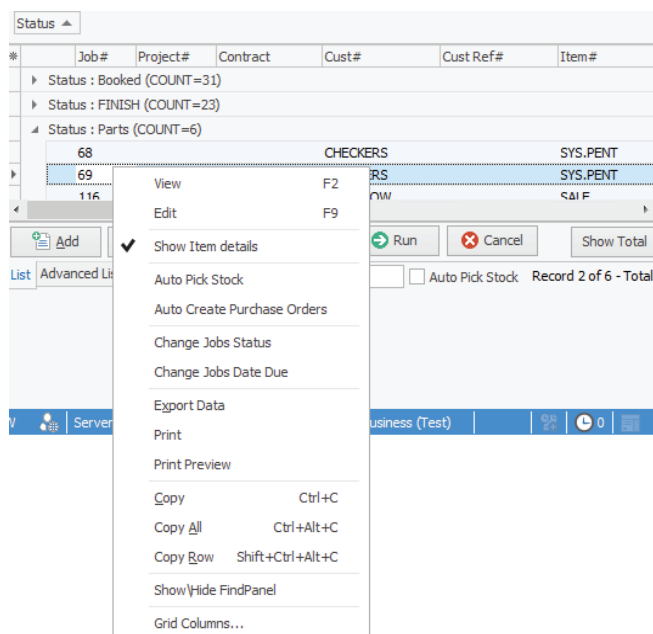
Workflow (and systems), in the simplest terminology, **is the method or methods of doing, producing or organising something.** In a business, people operate within workflow, or develop and manage workflow systems and processes. The series of actions impact on productivity and ultimately financial outcomes.

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.



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

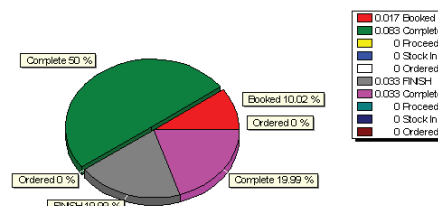
Stock Profit

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
A505058510	Win XP Pro	UNIT	18.1818	13.7545	\$4.43
C920808300	Mouse MS Basic Optical OEM	UNIT	135.4545	98.78	\$36.67
K1131408000	Norton Internet Security 2005	UNIT	12.6818	8.78	\$3.90
K1142640000	Stapler Rapid StandUp Cobra Blue	UNIT	2.4091	1.52	\$0.89
	Staples Rapid 26/6 Box 5000	UNIT			
			\$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.

Return to Vendor	Stock Adjustment	Quote	Cheque	General Journals	Packaging	Stock Take	Project	Documents	Asset										
Sales Job	Service Job	Manufacturing Job	Job Parts/Stock	Job Parts/Stock	Invoice	Purchase	Stock Transfer	Return from Customer											
In Object	In List	Active	Status	Responsibility	Comments	Due Days	Due Hours	Due Mins	Sec. L	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from	Exclude from
<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 this Status. In the case of a Service Job, the Item to be serviced would be placed on the relevant person's "Booked" shelf. In the case of a Sales Job, the Job is ready to be picked.														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Burn In	Us	Service Job - The Item has been serviced and is undergoing tests, the results of which will affect the decision to return that item back into the workflow. After sufficient testing the Job would normally move onto FINISH.														
<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. This Status is used internally by Jim2 when a Job is cancelled.														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CANCEL	Special	This would be regarded as a qualified Booked. It's useful, especially when doing bulk serving 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.														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Checked	Us	The final Status of successfully completed Jobs. Service Job - The Item has been repaired and fully tested. Sales Job - The Job has been picked/built and is now completed.														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FINISH	Invoice	A Supplier related to this Item needs to be contacted or further technical information is required to assist the technician repairing this Item. This would normally follow on from Call or Wait. The Customer has given approval to continue and the Job can return to the workflow. The Job is effectively on hold waiting for Stock/Parts.														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Info	Us															
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Oked	Us															

Status: ☐ Booked ☐ Burn In ☐ Call ☐ CANCEL ☐ Checked ☐ FINISH ☐ Info ☐ Oked

Security Level: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Exclude from committed ☐ Exclude from benchmark ☐

Comments: This is the default Status applied to a Job when first added. All Jobs begin with this Status. In the case of a Service Job, the Item to be serviced would be placed on the relevant person's "Booked" shelf.

Linked status (Workflow): ☐ Burn In ☐ Call ☐ CANCEL ☐ Checked ☐ FINISH ☐ Info ☐ Oked ☐ Ordered ☐ Out ☐ Parts ☐ Problem ☐ Proceed ☐ RAI.NR ☐ RAI.LUS ☐ Wait

Publish as:

Save Cancel Delete View Close

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).

ag a column header here to group by that column

Job#	Status	Cust#	Item Desc	Project#	Serial#
40	Wait	DAYCOM	VGA Monitor		VGA. 119
41	RAI.NR	DAYCOM	VGA Monitor		VGA. 132
42	RAI.NR	DAYCOM	VGA Monitor		VGA. 155
44	Problem	MOSLEY.GP	Date Recovery		7EOL256
45	FINISH	MOSLEY.GP	VGA Monitor		TG345L
55	Problem	MODEM.COMP	Tiger 56K Modem		AT. 1528
56	Wait	MODEM.COMP	Tiger 56K Modem		AT. 1530
60	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1538
61	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1540
62	Problem	MODEM.COMP	Tiger 56K Modem		AT. 1515
63	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1555
64	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1556
65	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1558
66	FINISH	MODEM.COMP	Tiger 56K Modem		AT. 1560
68	Parts	CHECKERS	System Pentium		924578

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



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