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Jim2® v4.1 for Managed Print Services For System Administrators

The following information is designed to give current Jim2 MPS Edition administrators a summary list of MPS functionality updates and critical information you need to know when upgrading to Jim2 v4.1.

Dynamic Supplies Feed

If you are currently receiving the Dynamic Supplies Feed, you must contact Paul Manning at Dynamic Supplies (paul@ds.net.au) to request the new feed format as it's compatible with this version. The old format feed supported by Jim2 v4.0 is not supported in v4.1.

New Project Template Security

By default, non-administrator users are given 'View' only access to Project Templates. This means that no user will be able to add or edit Project templates until security is updated to do so. Initially, it is our recommendation that no user is given this ability until they have familiarised themselves with the new project template functionality.

Refer to: http://jim2help.happen.biz/project_templates.html

Default Stock Tab

The Default Stock tab in Jim2 4.1 is no longer used to configure stock codes that are added to Consumable, Onsite and Workshop jobs created from machines.

The Default Stock tab is now hidden from view. If required, this can be re-enabled in Jim2 Options at **Tools > Options > Projects* > Display default Stock(Legacy)** tick-box.

The screenshot shows the 'Options' window with a tree view on the left containing 'Company', 'Security', 'General', 'Branches', 'Labour', 'Job', 'Invoice', 'Stock', 'Customer Returns', 'Managed Service', 'Machines', 'Managed Services', and 'Quote'. The 'Managed Service' option is selected. The main panel is titled 'Managed Service' and contains the following settings:

- Projects
- Enable Managed Services
- I call Project: Managed Service
- Set Billing Jobs to Ready
- In job display Projects during Cardfile entry
- Prepaid Reorder % (Used): 100
- Maximum Balancing Entry: 0.05
- Bill Manual From List: Ask User
- Display Default Stock (Legacy)

A note on the right states: 'Note: Setting Jobs to ready will cause you to by-pass the normal Job alerts such as Watchouts, Customer and Stock checks'.

*The Projects module may be called Machine, Contract or other, depending on your individual setup.

Refer to: http://jim2help.happen.biz/managed_print_services_edition_enable_project.html

If you have configured machine contracts with stock lines, a new machine specific job template is created as part of the upgrade process.

Default and Machine Specific Templates

Where no specific stock is found, you will find that the machine is configured to use the following three templates for the creation of applicable jobs by default:

1. Onsite MPS auto-created template
2. Consumable MPS auto-created template
3. Workshop MPS auto-created template

These templates should be reviewed and updated as applicable.

Any change to these templates will affect how jobs look when they are created for all machines that are linked to them.

Where stock is found for a given machine, a machine-specific version of the template(s) is created and linked to the machine, and will reflect the original configuration of the Default Stock tab.

Any change to one of these machine-specific templates will only effect the jobs that are created for that specific machine.

You can review the templates that have been created from within the Templates tab of the machine contract, or via the new Template List.

Refer to:

- Page 79 of the [v4.1 Release Notes](#)
- or the online Jim2 HelpFile at http://jim2help.happen.biz/create_machine_contract.html

Process to Merge Existing Machine Templates into the New v4.1 Template Format

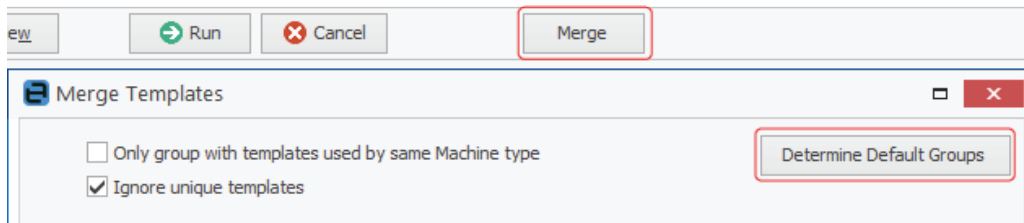
While the billing side of the MPS Edition has not changed, the concept of templates can be applied to non-billing scenarios in this edition.

When upgrading, machine specific templates will be created where stock associated to Consumable, Onsite and Workshop jobs are found in the Default Stock tab.

The following outlines how these templates can be 'merged' to better utilise Jim2 template inheritance, a key feature of project templates.

The screenshot shows the 'Machine Template List' window. At the top, there are search and filter fields for Template #, Template Name, Machine System Type, Item, Job Type, and Machine Type. Below these are 'Template Restrictions' and an 'Action' dropdown set to '<Unrestricted>'. A table lists the templates with columns: Template #, Template Name, Action Constrai, Object Type Co, Object Constrai, Item #, Card Code #, Job Type, Enabled, and Shared. The table contains three rows: 1. Default Template (Leave value, Card # on, Leave value, Enabled, Shared), 2. Managed Services Default (Billing, Machine, Managed, Item on, Card # on, Enabled, Shared), and 3. Billing:Contract:95 (Billing, Machine, 95, Item on, Card # on, Enabled, Shared). At the bottom, there is a toolbar with buttons for Add, Edit, View, Run, Cancel, and Merge. The Merge button is highlighted with a red box.

Template #	Template Name	Action Constrai	Object Type Co	Object Constrai	Item #	Card Code #	Job Type	Enabled	Shared
1	Default Template				Leave value	Card # on	Leave value	✓	✓
2	Managed Services Default	Billing	Machine	Managed	Item on	Card # on		✓	✓
3	Billing:Contract:95	Billing	Machine	95	Item on	Card # on		✓	



Refer to:

- Page 86 of the [v4.1 Release Notes](#)
- or the online Jim2 HelpFile at http://jim2help.happen.biz/managed_print_services_edition_merge_templates.html

In Conclusion

As this document highlights the most important enhancements for Jim2 MPS Edition, we can't emphasise enough how important it is to read the technical requirements documentation and [Jim2 v4.1 Release Notes](#) prior to performing the upgrade of Jim2.

If you require further assistance, contact our support team on 02 9570 4696 or at support@happen.biz



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