JOTA2 Client How to Guide

Need help? Contact your Local Bureau: 1300 548 787



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Accessing JOTA2

- Go to: <u>https://jota2.timg.com/</u>
 NB: JOTA2 works with all web browsers, including Internet Explorer version 10 or greater
- Log In → Enter your Email Address and Password → Sign In





Forgot Password?

- The Forgot Password? link can be used to reset your password if it's ever forgotten
- Select Forgot Password?

timg [®] jota2
Welcome back! Email
Password
Forgot Password?
Sign in
Register as a new user

• Enter your email address → Email Link

timg [®] Jota ² Register		LOG IN
Forgot your passwo Enter your email.	ord?.	
Email	jjones@test.timg.com Email Link	

• If the email address is active, a password email link will be sent to you to reset your JOTA2 password.



Dashboard

Once logged into JOTA2 you will see the **DASHBOARD** screen showing:

- 1. CREATE JOB: menu item to create new jobs.
- 2. Drafts: to access saved drafts, jobs you started to create but haven't submitted.
- 3. Favourites: to access jobs marked as favourites using the heart icon.
- 4. History: to access previously submitted jobs.
- 5. **Search:** use job details to find a job.
- 6. INVOICES: menu item to access invoices and credit notes.
- 7. LOG OFF: to exit JOTA2



Create Job

• Step1: CREATE JOB \rightarrow New Job



• Step 2: Select Product → NEXT

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE		5 DETAILS	6 CONTACTS	7 SUBMIT		
		ŧ)					SAVE DRAFT	
COPYING General Copying Court Copying Specialised Copyi	ng	P Genera Counse Comm	RINTING al Printing el / Court / Appea ercial Printing	Books	SCANN General Scar Discovery Se Coding / Deli	JING ming rvices miting / Barcoding		OTHER Trolley Hire Binding / Laminating Court Courier	



- **Step 3:** Based on the Product selected, there will be different options available:
 - + To select the option
 - To remove the option
- Select all required options → NEXT

	U	2	3	4	5			
	START ORDER	PRODUCTS	CUSTOMISE	INSTRUCTION	IS DETAILS	CONTACTS	ZORMII	
REATE COPYING JOB	/ OPTIONS							
Please select Cop	ying options belo	w						
	AVA	LABLE				SEL	ECTED	
Court Copying				+ [Tagged Copying			-
					Paginated Copying			-
				L				

- Step 4: There are 3 ordering instruction options:
 - **GUIDE QUESTIONS** is the recommended option with questions prompting the required information to be entered.
 - **MANUAL ENTRY** enables instructions to be copied and pasted. This is particularly useful if you have been emailed the order instructions.
 - **JUST CREATE THE JOB** enables the order to be quickly logged, and TIMG staff can get the details from your technical contact.
- Choose an ordering option → NEXT

	1	2	3	4	5	6	7	
LOG COPYING JC Please choose	DB > INSTRUCTIO	ons otion below:						
	A				ļ			
GUI	DE QUESTIONS		Ν	MANUAL ENTRY			JUST CREATE THE JOB	
Recomr ordering that proce ti	mended option g. Easy questio t allows quick essing and fas urnaround.	n of ons t	Know want option or past	v exactly what ? then choose n and you can te in the instru	you this type ction	No	ot sure what you need? We will pass on any questions to the nominated technical contact	
< BACK							NEXT	2



- **Step 5:** The guide questions will vary depending on the product and options selected.
 - **CUSTOMISE** will display the list of options available for this order enabling each option to be added or removed.
- Enter all required details

1 START ORDER	2 3 PRODUCTS CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT		
CREATE COPYING JOB / DETAILS Before we gather the specific details of t	γour Copγing job, please	customise as re	quired	Save Draft o used to ensu job details a lost befo submitting o	can be ure the aren't ore r if you)
Number of Items (enter one or more) S Folders: 2 Manila Files:	ee an example <u>here</u>	Bundles: Plans:		want to subr later tim	nit at a e. Other:	Paginated Copying Court Copying	
Boxes: 1 Number of Copies Copies Required: 10		Discs:					
Paginated Copying Paginate: Ocipies Only Originals Position of label on page: Top Left Top Centre Bottom Left Bottom Centre	Top Right Bottom Right	Num O Form O O	ber sequence: Continuously acre Start each folder at of number: 1, 2, 3, 001, 002, 003, PREFIX-001, PRE Specify other:	oss folders from 1 :FIX-002, PREFIX-00	3,	Remove	
Matter/Reference Number: Ref#123456 Billing Description: BillCode123456 Special Instructions: Please replace the tags after copying							
< BACK						NEXT >	

Matter/Reference Number is mandatory for some Clients.

Billing Description appears on the invoice and is mandatory for some Clients.

Special Instructions is optional and can be used for special instructions or additional details.

• Select NEXT



• **Step 6:** By default, you will appear as the person responsible for all processing and communications.

Other contacts can be added, and you can remove yourself from all except Logged By.

• ADD NEW CONTACT

	1	2 3	4 5	6	7	
LOG COPYING JOB >	CONTACTS				SAVE DRAFT	
	ADD EXISTING	₽	ADD NEW CONTACT			
Job Contacts						
Operator Operator MW	+ 🗹					
Responsibilitie	s for Processing	g and Communications	Drag and droj	p contact from above t	o relevant responsibility	
Logged By	Pickup	Technical Questi	ons Status Updates	Delivery	Invoice	
Operator MW	Operator	r MW X	Operator MW	Operator MW	Operator MW	
< BACK					NEXT >	

• Enter the new contact's details -> Add Contact

	Add J	ob Contact	
First Name	Donald	Address 1	
Last Name	Scrooge	Address 2	
Position TItle	Finance Manager	City/Suburb	
Business Hours Telephone	0212345678	State	
After Hours Telephone	0212345678	Post Code	
		Country	
		Email	finance@shalelaw.com
			Add Contact Cancel



Select the responsibilities assigned to the new contact using the + or by dragging and dropping.
 > NEXT

Operator	+ 🗹 🛛 Fin	ance Manager 🗙				
Operator MW	Dor	O Pickup				
		O Technical Questions				
Responsibilities f	or Processing and	O Status Updates	Drag and drop co	ontact from above to	relevant responsibil	
ogged By	Pickup	O Delivery	Status Updates	Delivery	Invoice	
		O Invoice				
Operator MW	Operator MW	Operator MW	Operator MW	Operator MW	Operator MW	
					Donald Scrooge 🗙	

- Step 7: Select Delivery Timing and Preferred Delivery Time → SUBMIT JOB
 - **Flexible** means your Preferred Delivery Time can be altered by a day or more.
 - Limited Flexibility means your Preferred Delivery Time can be altered by hours.
 - **Urgent** means you do not want your Preferred Delivery Time to be changed.

	1	2	3		4		5	6	7
	> SUBMIT								SAVE DRAFT
Job Timing TIMG offers an on- is, you allow us to p While we promise t Delivery Timing: Flexible Limited Flexi	demand servic provide you the to make every pility	ce. We strive to de e best possible pr effort to meet yo	eliver every ice while sti ur requeste	ob on tim II meeting d time fra	e as req ; your ne me, it w	uested. B eds. buld help	y giving us an ii us to know wh	ndication of how f	flexible your delivery timeframe ound time frame is:
Preferred Delivery	Time	October	22, 2019 4	:00 PM		Ĩ			
K BACK		 Su M 29 3 6 7 13 1 20 2 27 2 3 4 	Octob 10 Tu 1 10 1 1 22 1 22 1 22 1 5 1 5	Pr 2019 Ve Th 2 3 9 10 16 17 23 24 30 31 6 7 ©	Fr 4 11 18 25 1 8	Sa 5 12 19 26 2 9			SUBMIT JO

Your order has been submitted, use **Job History** to keep track of your job's progress.



Job History

Job History can be accessed from the **Dashboard** and **Create Job** screens.

CREATE JOB					SAVE DRAFT	
Click 'New Job' to begin	New Job					
My Jobs						
🕑 Drafts 1	Favourites 1	🕼 History	2	Q Search		
Scan ₽ ♡	Copy					
Scanning Services Reference: 20200116a	General Copying Reference: Ref#123456					
Shale Law Sydney - Conveyancing Patrick McCoy 3bb Estimated Delivery 15:15, 21/01/2020	Shale Law Sydney - Conveyancing Patrick McCoy Preferred Delivery 14:30, 17/01/2020					

Each job summary will display the following details:

- 1. **Job ID number**: Each job is assigned a unique job ID number. Please quote this number when speaking to TIMG staff.
- 2. **Reference Number**: Is the matter/reference number you entered when you created the job.
- 3. A) **Preferred Delivery** is your nominated preferred delivery time and will show after you first submitted the job.

B) **Estimated Delivery** is the amended delivery time after TIMG staff have accepted and scoped the job.

4. **Status**: Hover your mouse over the circle icon to see the current status of your job.

You can click on a job to see its full details.



Job Notes & Communication

Job Notes can be used to communicate with TIMG staff about a job.

• Open an existing job through **History** or **Favourites** → **COMMUNICATION HISTORY**

	1 START ORDER	2 PRODUCTS			5 DETAILS	6 CONTACTS	7 SUBMIT		
V E	IEW COPYING JOB #92 / DET Before we gather the spec	AILS	opying job, please	customise as requ		ATION HISTORY	SAVE CANCEL JOB CUSTOMISE)	
	Number of Items (enter	one or more) See an	example <u>here</u>	_					
N N	Folders: Manila Files:	1		Bundles:		Other:			
	Boxes:			Discs:					
	Number of Copies								
	Copies Required:	10							

• Select Note Type → Enter Notes → Add

	Job Notes - Job 92	
	Conversation History - No messages found	
Note Type	Add Job Notes	
Notes	Please make 20 copies instead of 10	
	Ada	

• Your Job Note has been added.

	Job Notes - Job 92	×							
	February 2020 Patrick McCoy 17/02/2020 10:53:43 AM INSTRUCTION Please make 20 copies instead of 10	*							
		-							
Add Job Notes									
Note Type Notes	Technical Instruction Issue Other								

NB: After TIMG staff have read the note, they will mark it as acknowledged. 🧔



When TIMG staff respond to your Job Note you will see the COMMUNICATION HISTORY flag with an unread job note.

Emails will be sent to alert the nominated job stakeholders to the new Job Note as follows:

- > For Technical Notes your nominated Technical Questions contacts will receive an email.
- > For Instruction, Issue and Other Notes your nominated Status Updates will receive an email.
- Select COMMUNICATION HISTORY

1 START ORDER	2 PRODUCTS	GUSTOMISE		5 DETAILS	6 CONTACTS	7 SUBMIT
VIEW COPYING JOB #92 / DET Before we gather the spec	AILS ific details of your	^r Copying job, pleas	e customise as requ	COMMUNICA	TION HISTORY	SAVE CANCEL JOB
Number of Items (enter	one or more) See	an example <u>here</u>	Bundles:		Other	
Manila Files:			Plans:			
Boxes:			Discs:			

• Click the Job Note to acknowledge you have read it.

	Job Notes - Job 92	ж
	February 2020	*
	Parinick McCoy 17/02/2020 10:534:3 AM INSTRUCTION Please make 20 copies instead of 10	
JJ jim Jones INSTRUCTIO Thank yo	17/02/2020 11:01:15 AM N I for the note, we will make 20 copies as requested.	
		Ŧ
	Add Job Notes	
Note Type Notes	Technical Instruction Issue Other	



Duplicate Job

The duplicate icon **i** is a quick way to create a new job from an existing one.

Create Job → History or Favourites → choose job to duplicate
 NB: duplicate job icon isn't available on the Dashboard, you must be on the Create Job screen.

ING JOTA2 CREATE JOB	INVOICES						HELLO F	PATRICK MCCOY!	0 LO
	1 START ORDER	2 PRODUCTS	3 CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT		
Click 'New Job' to b	egin	(New Job						
My Jobs									
🕑 Drafts	14	Favourites	5	2 🗷 H	istory	27	Q Search		
Print # 129		P	rint		Print # 38	∎ ⊃		Scan	1
Counsel Brief Reference: 123456 Shale Law Sydney - Conveyar Client BM Preferred Delivery 15:30, 27/	ncing /02/2020	General Prin Reference: 123 Shale Law Sydne Patrick McCoy Preferred Delive	iting 1456 ey - Conveyancing ry 17:00, 25/02/202	Ger Refo Shal Patr 0 Estir	eral Printing erence: 54321ad e Law Sydney - Conv ck McCoy nated Delivery 11:1!	7eyancing 5, 21/01/2020	Scanning Reference: Shale Law S Patrick McC Estimated D	ydney - Conveyancing oy Delivery 16:45, 18/02/2	020
	.ogged 🌛		Logged			Delivered 💿		Deliver	ed 💿

Check and edit the required details for the new job before submitting.



eDOC Files

eDOC files is the JOTA2 repository for electronic files useful for:

- **Print jobs** If you nominate to upload the files you want printed. When creating the job, the Guide Questions will prompt you to upload the file(s) to be printed.
- Scan jobs If you instruct TIMG to upload the scanned files into JOTA2.
 When the job is completed the Paperclip icon in Job History will give you access to the scanned files.

_			
To begin a new job choose yo	Jr company		
Location	iney	¥	
Client Name Sha	le Law Sydney - Conveyancing		
User Name Pa	rick McCoy	▼ New Job	
My Jobs			
במטן אוא			
🕈 Drafts	3 Favourites 1	☑ History 6	Q Search
Scan @	♥ Print ■♥ #38	Copy	Scan
Scanning Services	General Printing	General Copying	Scanning Services
Shale Law Sydney - Conveyancing			
Patrick McCoy	Patrick McCoy	Patrick McCoy	Jim Jones
Estimated Delivery 09:15, 21/01/2020	Preferred Delivery 11:45, 21/01/2020	Preferred Delivery 17:30, 21/01/2020	Estimated Delivery 22:15, 17/01/2020

You may have multiple folders and files to access.

EDOCS	
Scan item barcode to view	
Scanning Services - Shale Law Sydney - Conveyancing : Patrick McCoy	
Folder-J2-41-0001	
Jota 2 Client How to Guide V1.1.pdf Remove]	



Job Favourites

Favourites is useful for jobs you want to keep updated with or are likely to duplicate in future.

CREATE JOB				
Click 'New Job' to begin	New Job			
My Jobs				
🕼 Drafts 1	♥ Favourites 1 🗗 Histo	ry 2	Q Search	
Scan 🕫 🕫	Сору 💵			
# 32 Scanning Services	# 31 General Copying			
Reference: 20200116a	Reference: Ref#123456			
Patrick McCoy	Patrick McCoy			
Estimated Delivery 15:15, 21/01/2020	Preferred Delivery 14:30, 17/01/2020			

Click the heart icon 💙 to add jobs to your **Favourites**.

Click **Favourites** to see your favourite jobs.

Click 'New Job' to begin		New Job					
My Jobs							
🗹 Drafts	1	Favourites	1	🕑 History	2	Q Search	
Copy # 31							
General Copying Reference: Ref#123456							
Shale Law Sydney - Conveyancing Patrick McCoy							
Preferred Delivery 14:30, 17/01/202	20						

To remove jobs from your favourites, unselect the heart icon.





Job Drafts

Drafts contains jobs you have saved but not submitted yet.

Click on a draft job to continue to complete the job details and submit when you're ready.

DASHBOARD My Jobs				
🖉 Drafts 2	Favourites	2 🗹 History	4	Q Search
Copy ♡ #37	Copy (************************************	2		
General Copying Reference: [Unknown] Shale Law Sydney - Conveyancing Patrick McCoy Updated 11:33, 17/01/2020	General Copying Reference: [Unknown] Shale Law Sydney - Conveyancing Patrick McCoy Updated 15:07, 16/01/2020			
		Status: Draft		

The **Delete Draft** button is available in each job, if the draft job is no longer needed.

	1	2	3	4	5	6	7	
51	TART ORDER	RODUCTS	CUSTOMISE	INSTRUCTION	IS DETAILS	CONTACTS	SUBMIT	
CREATE COPYING JOB / DETAILS	S	tart Job					SAVE DRAFT	DELETE DRAFT
Before we gather the specif	fic details of yo	ur Copying j	ob, please ci	ustomise as r	required			CUSTOMISE
Number of Items (enter or	ne or more) Se	e an exampl	e <u>here</u>					
Folders:	5		I	Bundles:			Other:	
Manila Files:				Plans:				
Boxes:				Discs:				



Invoices

- Select INVOICES
- Enter search criteria → Search Invoices can be searched by:
 - 1. Date From & To
 - 2. Minimum to Maximum Amount
 - 3. Invoice Number
 - 4. Job ID
 - 5. Invoice Type
- Click the Download icon to open the invoice

timg [.] Jota	CREATE JOB	INVOICES			HELLO	PATRICK MCCOY!	🖯 LOG OFF
	Date From Date To		Minium Amount	2 Maximum Amount			
			Invoire Date	All	True	ear Q Search	
	38	INV400124	01/01/2020	\$187.00	Standard	0	
	38	000001	01/01/2020	\$187.00	Credit Note	0	
	62	INV400125	31/01/2020	\$125.40	Standard	Ø	
	87	INV400123	31/01/2020	\$119,614.00	Standard	0	
			First Previous	1 Next Last	Page Size:	10 🔻	



Glossary

Job Page

Job ID - Your Job ID is a unique number generated by JOTA2 each time you create a job. If you need support, we recommend quoting this number during your communication with TIMG staff to ensure we can help you in a timely manner.

Job Status - As your job moves through production the Status will be updated from "Logged" to "Scoped" to "Being Prepared / Processed / Finished / QAed", and finally to "Completed". You can always monitor the status of your job in your JOTA2 account.

Сору

General Photocopying - Select this option when you require the entire hard copy contents of a box or file to be photocopied.

Tagged Document Copying - Select this option when you require tagged pages or documents to be photocopied.

Paginated Copying - Select this option when you require pages or documents to be numbered and then photocopied.

Scan

General Scanning - Select this option when you require hard copy document(s) to be scanned and converted to a PDF or JPEG.

Discovery Scanning - Select this option when you need documents to be scanned in accordance with a Discover Protocol for exchange.

Print

General Office Printing - Select this option when you require a document or email to be printed.

Marketing and Commercial Document Printing - Select this option if you have general marketing material to be printed. This may include brochures, presentations, invitations, seminar handouts, books or business cards. This also includes any Graphic Design work that involves your documents being altered to complete your project.



Briefs, Appeal Books & Court Books

Counsel Brief/Brief to Advise - Select this option when you have an indexed or tabbed brief to be prepared/printed.

Court Book/Tender Bundle - Select this option when you have a Court Book or Tender Bundle to be prepared/printed.

Appeal Book - Select this option if your job requires preparation, formatting and printing of Appeal books for all appropriate courts.

Legal Technology Solutions

Process Electronic Documents - Select this option if your job requires electronic processing. This would include Ingestion, DeNISTing, Deduping and Metadata Extraction for upload to a review platform.

Process Hardcopy Documents - Select this option if your job requires hardcopy documents to be processed such as scanning, delimiting and coding for upload to a review platform.

Other Copying & Support Services

Binding - Select this option if your job requires binding only.

Trolley Hire - Select this option if your job requires a trolley to transport documents in the CBD.

Tab Dividers - Select this option if your job requires numbering, alphabetising (A-Z), or custom printed 5 or 10 tab dividers.

CD / DVD Duplication - Select this option if your job requires a CD or DVD to be duplicated.

Laminating - Select this option if your job requires laminating only.

Court Courier Service - Select this option if your job requires people and trolleys to transport documents to and from Court.

