

JOTA2

Client How to Guide

Need help?

Contact your Local Bureau: 1300 548 787

timg[®]

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Accessing JOTA2

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

timg JOTA₂ REGISTER

LOG IN

timg JOTA₂

Welcome back!

Email

jjones@test.timg.com

Password

.....

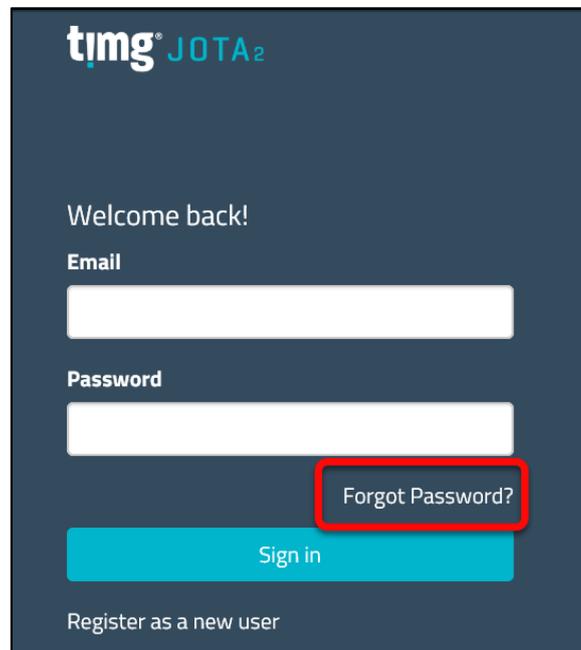
Forgot Password?

Sign in

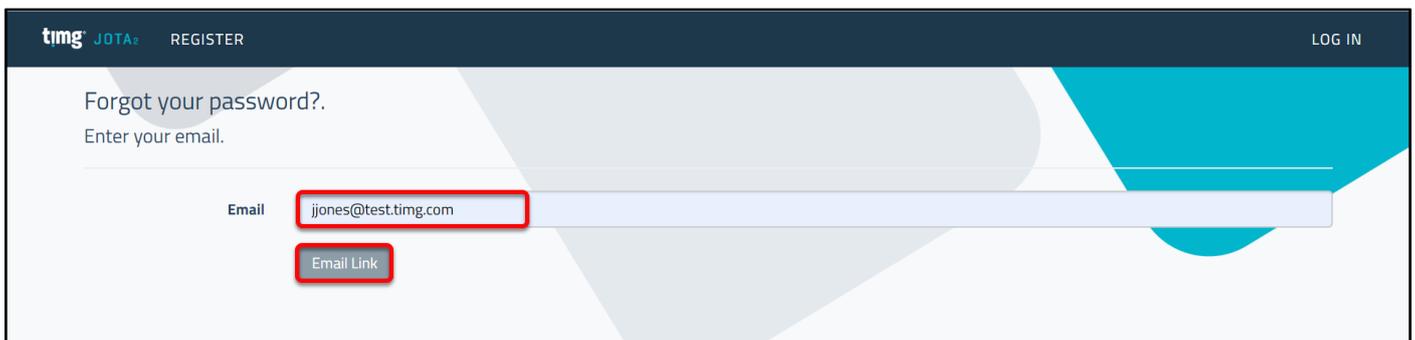
Register as a new user

Forgot Password?

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



- Enter your email address → **Email Link**



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

Dashboard

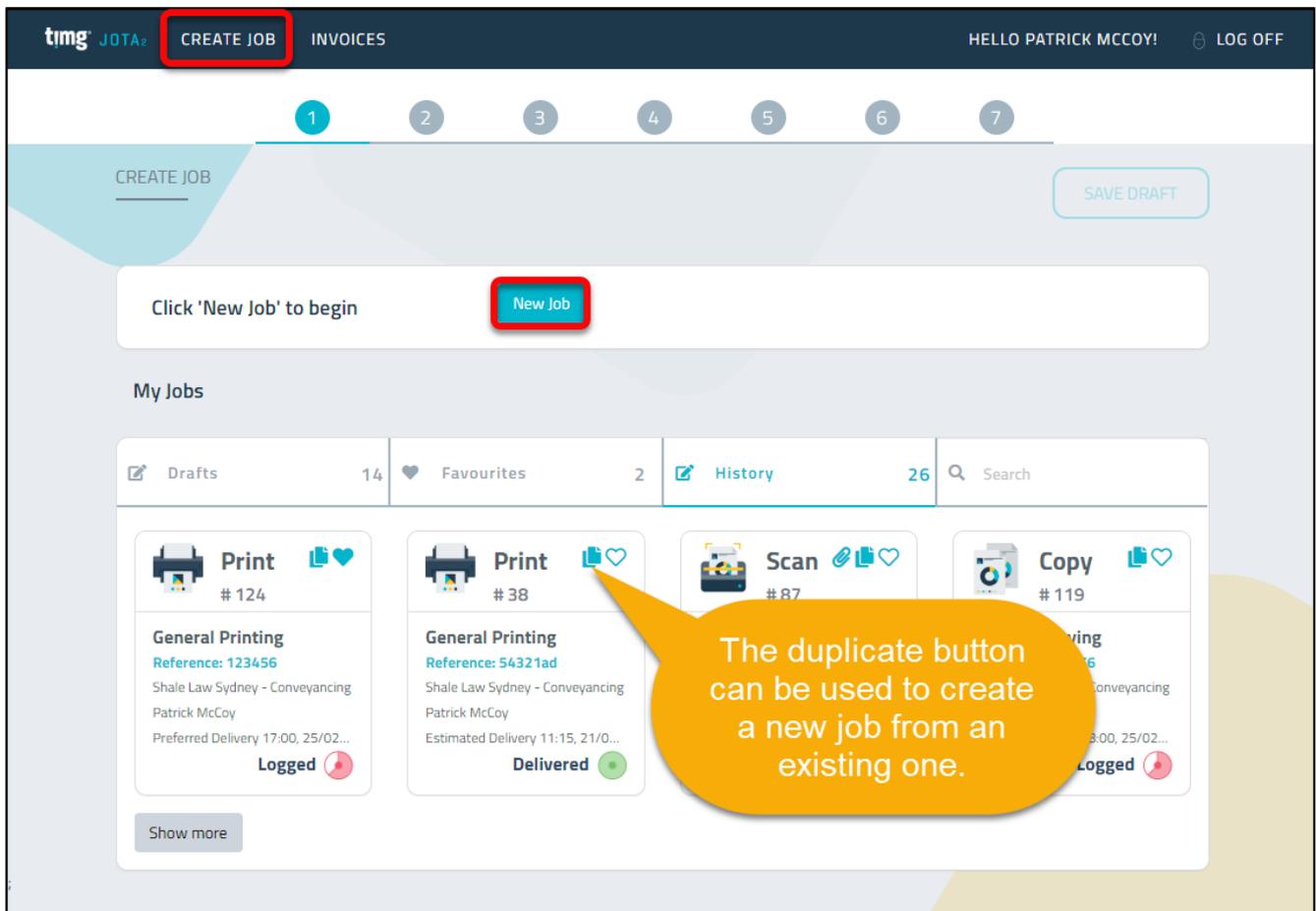
Once logged into JOTA2 you will see the **DASHBOARD** screen showing:

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

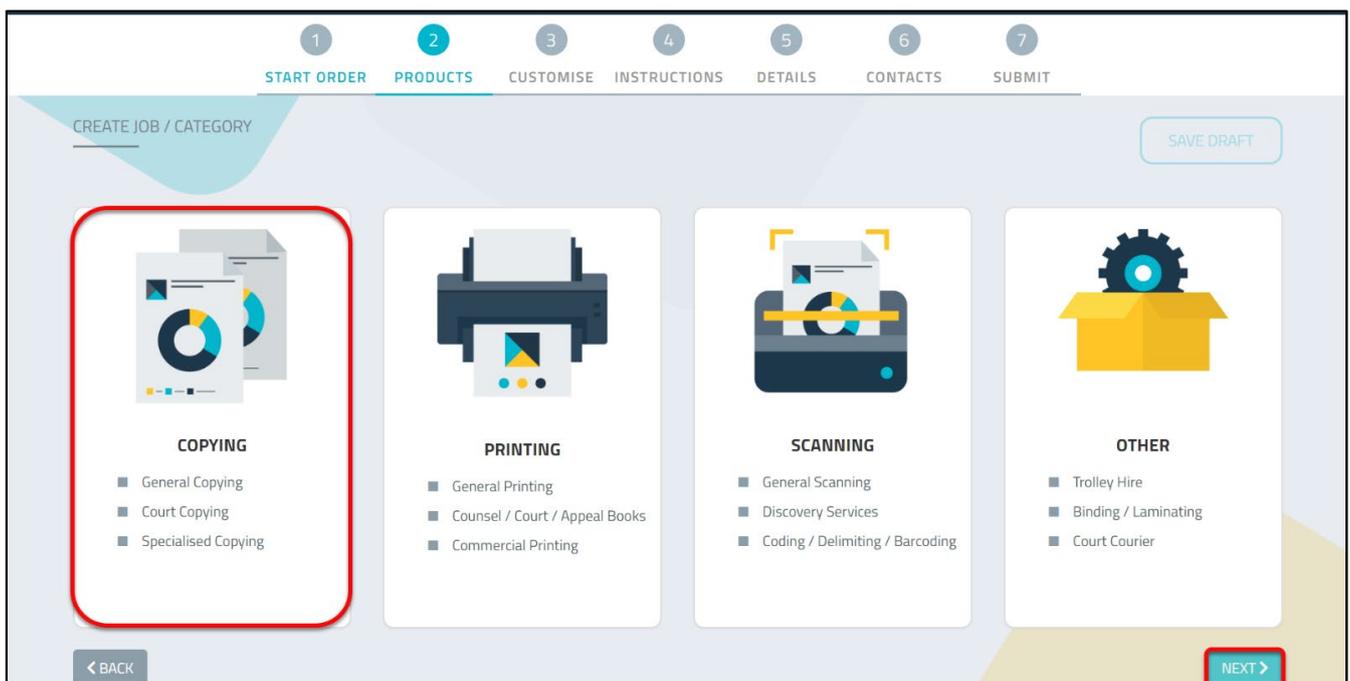
The screenshot displays the JOTA2 dashboard interface. At the top, there is a navigation bar with the 'tmg JOTA2' logo, 'CREATE JOB', and 'INVOICES' menu items. On the right side of the navigation bar, the user's name 'HELLO PATRICK MCCOY!' and a 'LOG OFF' button are visible. Below the navigation bar, the main content area is titled 'DASHBOARD' and 'My Jobs'. A horizontal menu below the title contains 'Drafts' (14 items), 'Favourites' (1 item), 'History' (26 items), and a 'Search' field. The main content area displays a grid of job cards. Each card includes an icon representing the job type (Print, Scan, or Copy), a job number, a title, a reference number, the client name, and the preferred delivery date. The status of each job is indicated by a colored circle: 'Logged' (red) or 'Delivered' (green). A 'Show more' button is located at the bottom left of the job grid. Red boxes with numbers 1 through 7 are overlaid on the image to highlight specific UI elements: 1 points to the 'CREATE JOB' menu item, 2 to the 'Drafts' menu item, 3 to the 'Favourites' menu item, 4 to the 'History' menu item, 5 to the 'Search' field, 6 to the 'INVOICES' menu item, and 7 to the 'LOG OFF' button.

Create Job

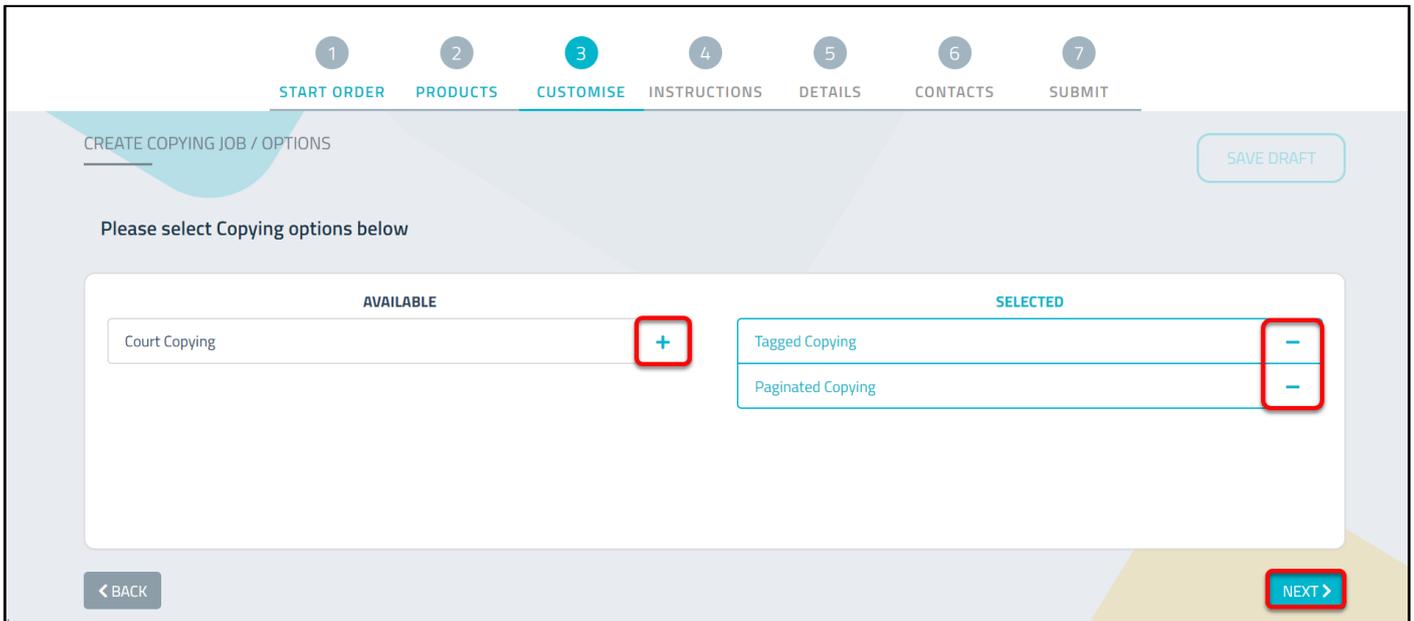
- Step1: CREATE JOB → New Job



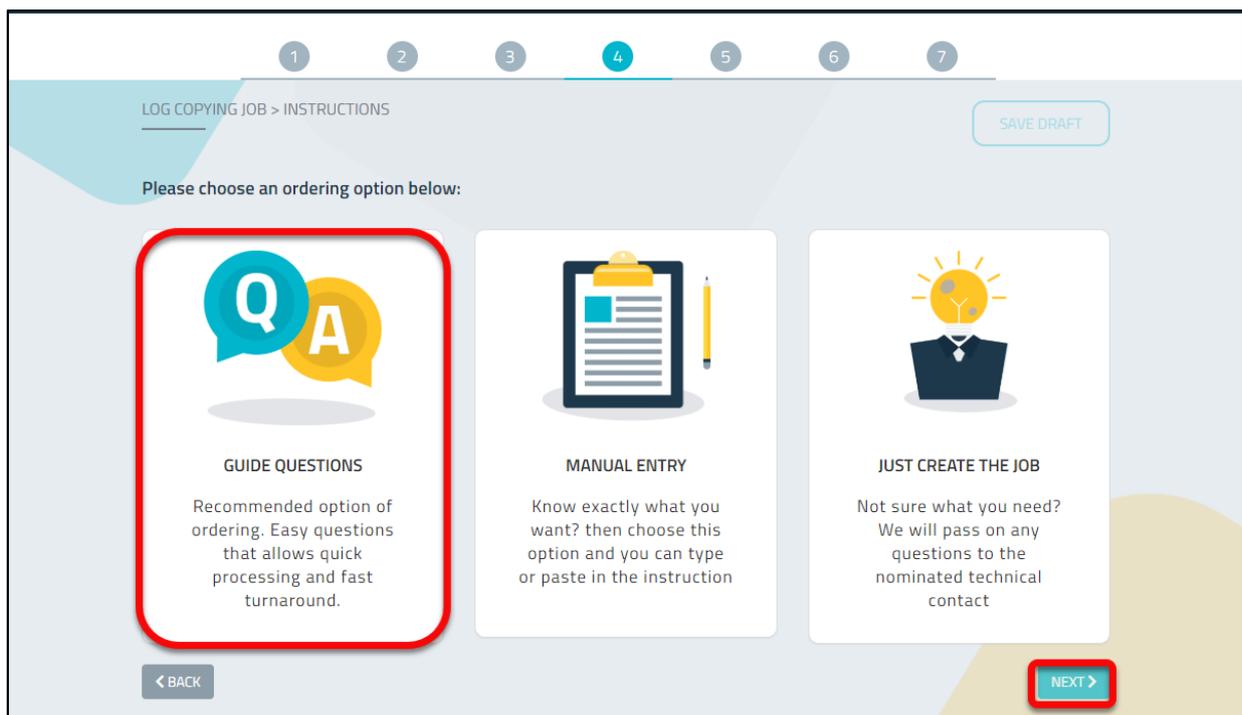
- Step 2: Select Product → NEXT



- **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**



- **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**



- **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

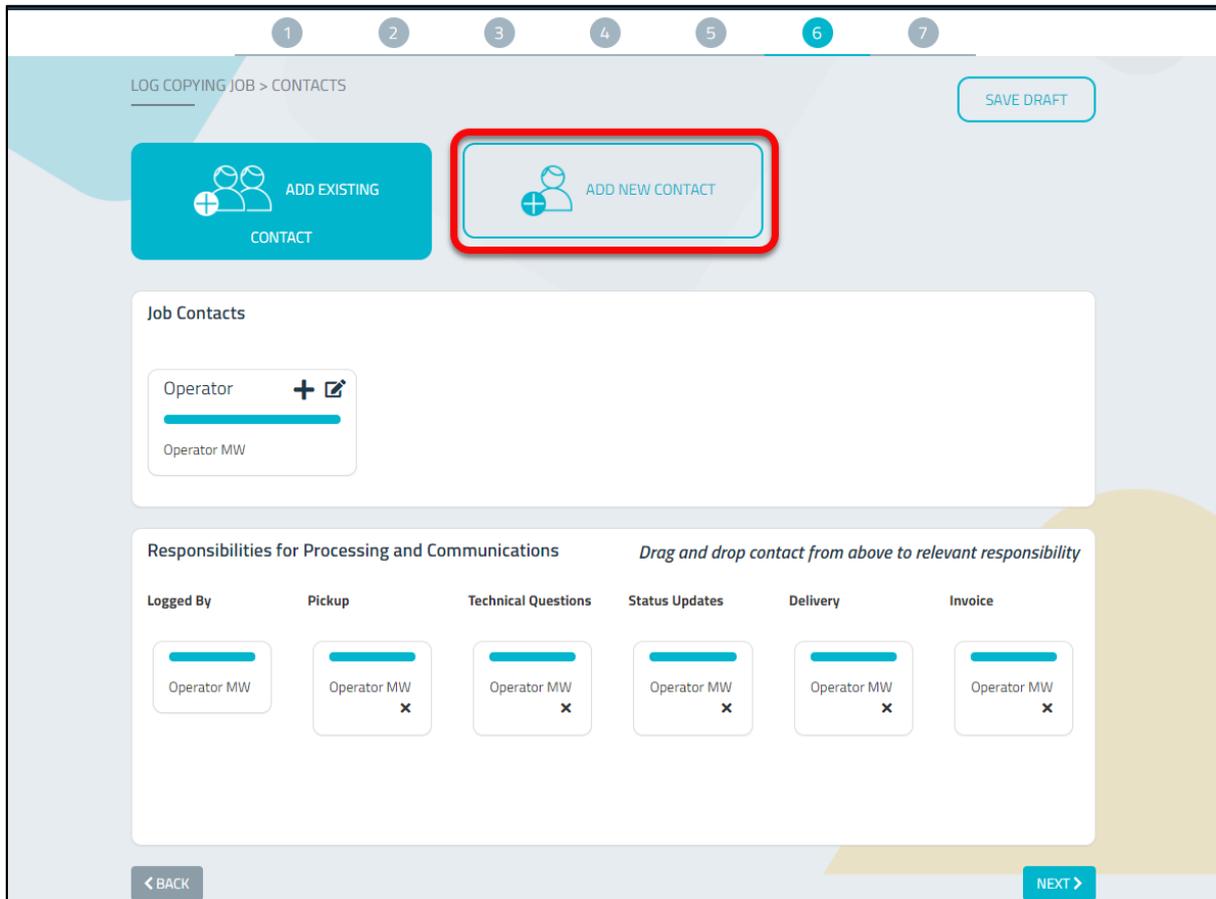
Matter/Reference Number is mandatory for some Clients.

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**



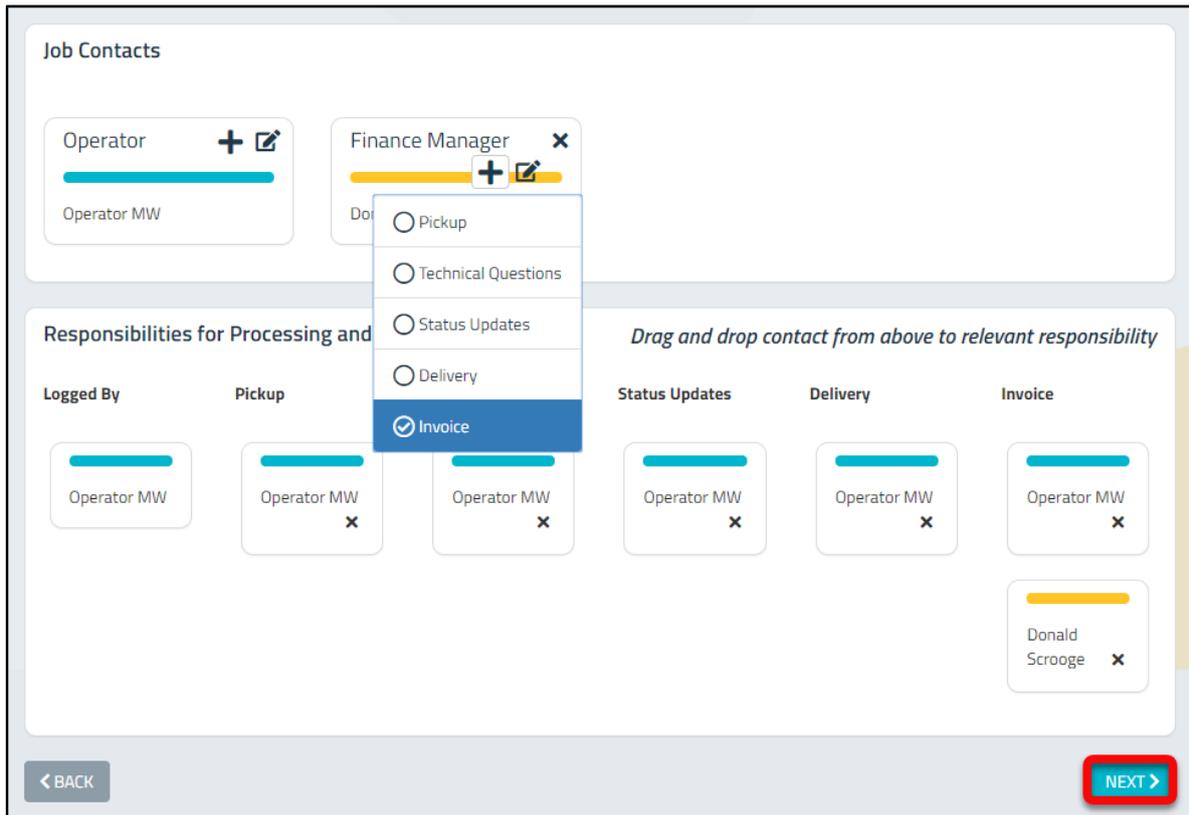
- Enter the new contact's details → **Add Contact**

Add Job Contact

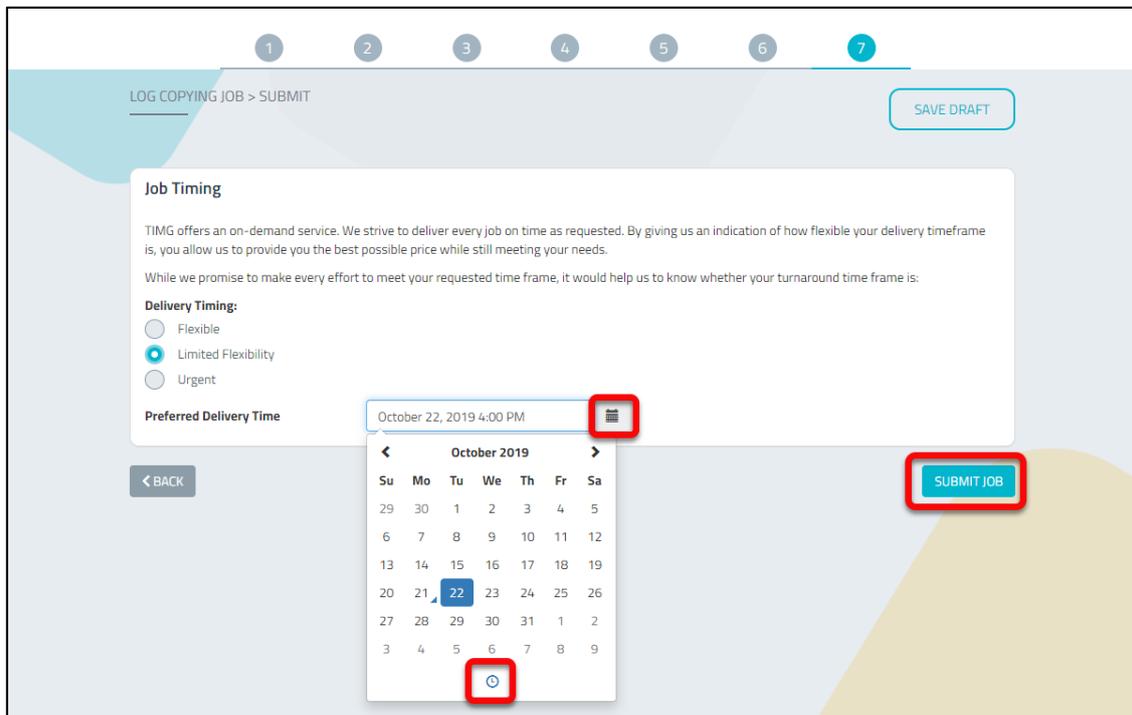
First Name	<input type="text" value="Donald"/>	Address 1	<input type="text"/>
Last Name	<input type="text" value="Scrooge"/>	Address 2	<input type="text"/>
Position Title	<input type="text" value="Finance Manager"/>	City/Suburb	<input type="text"/>
Business Hours Telephone	<input type="text" value="0212345678"/>	State	<input type="text"/>
After Hours Telephone	<input type="text" value="0212345678"/>	Post Code	<input type="text"/>
		Country	<input type="text"/>
		Email	<input type="text" value="finance@shalelaw.com"/>

Add Contact Cancel

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



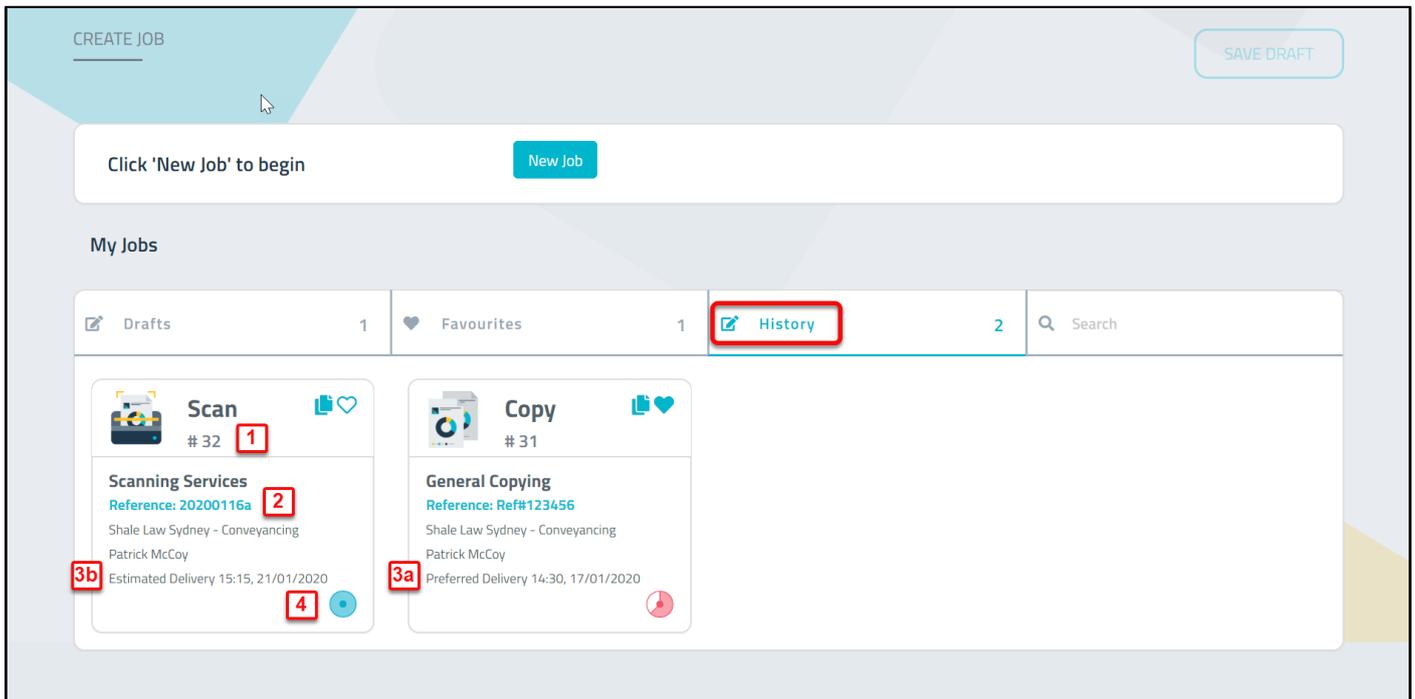
- **Step 7:** Select Delivery Timing and Preferred Delivery Time → **SUBMIT JOB**
 - **Flexible** means your Preferred Delivery Time can be altered by a day or more.
 - **Limited Flexibility** means your Preferred Delivery Time can be altered by hours.
 - **Urgent** means you do not want your Preferred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



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.



Each job summary will display the following details:

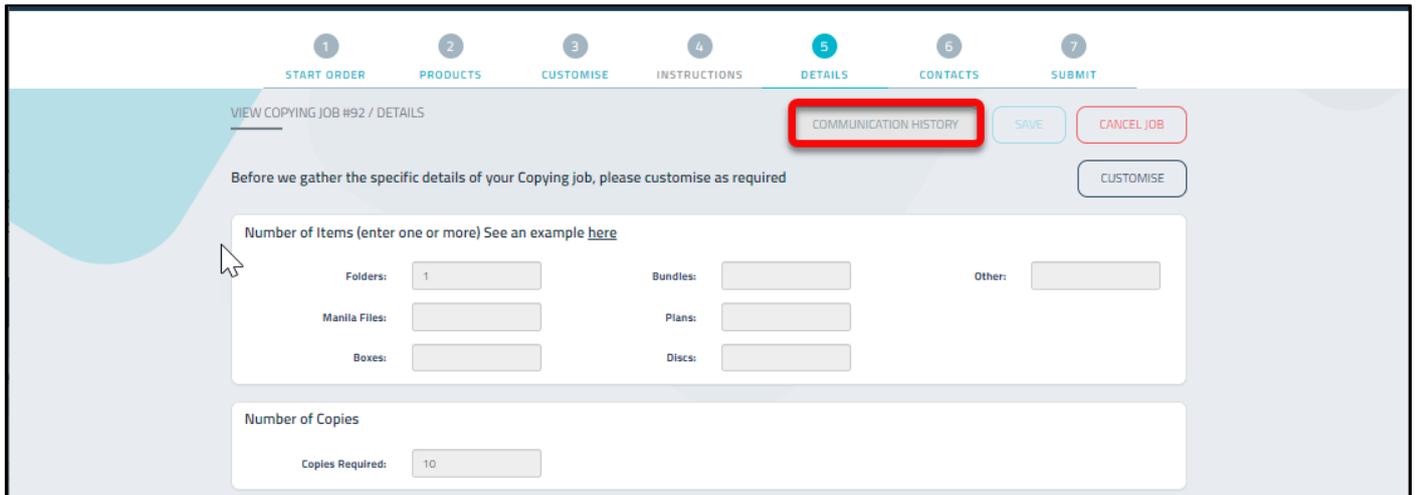
1. **Job ID number:** Each job is assigned a unique job ID number. Please quote this number when speaking to TIMG staff.
2. **Reference Number:** Is the matter/reference number you entered when you created the job.
3. A) **Preferred Delivery** is your nominated preferred delivery time and will show after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

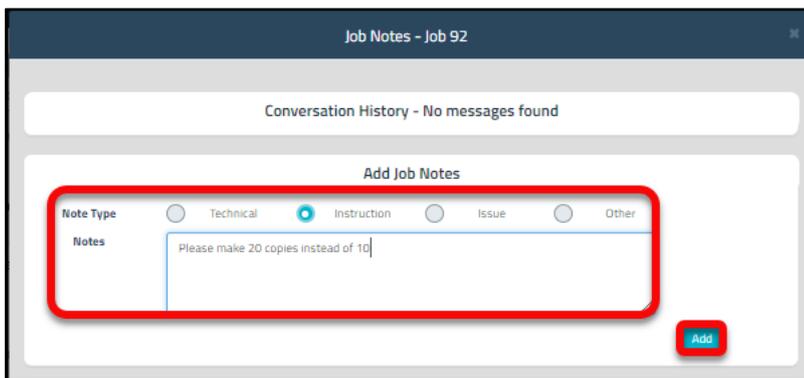
Job Notes & Communication

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

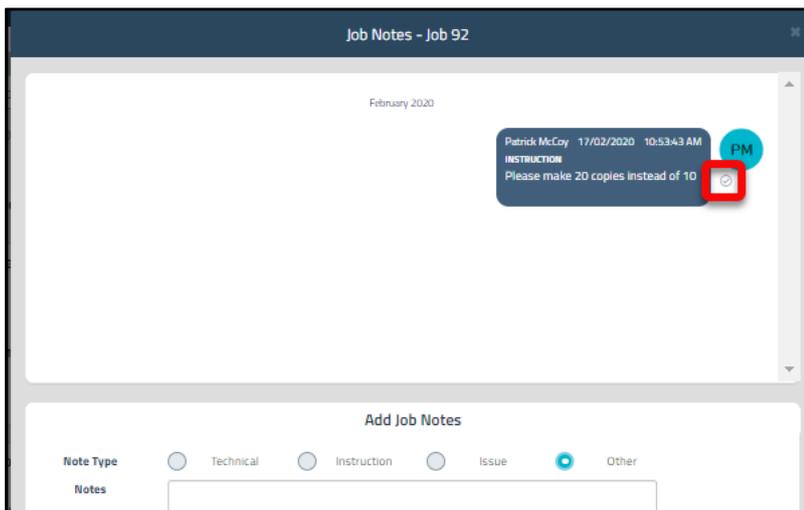
- Open an existing job through **History** or **Favourites** → **COMMUNICATION HISTORY**



- Select **Note Type** → Enter Notes → **Add**



- Your Job Note has been added.



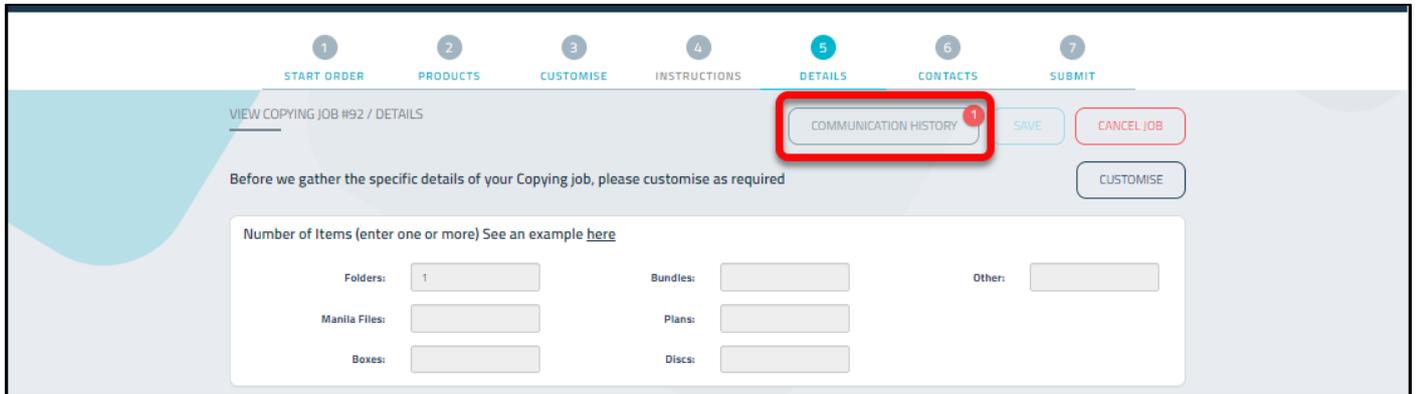
NB: After TIMG staff have read the note, they will mark it as acknowledged. 🗒️

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

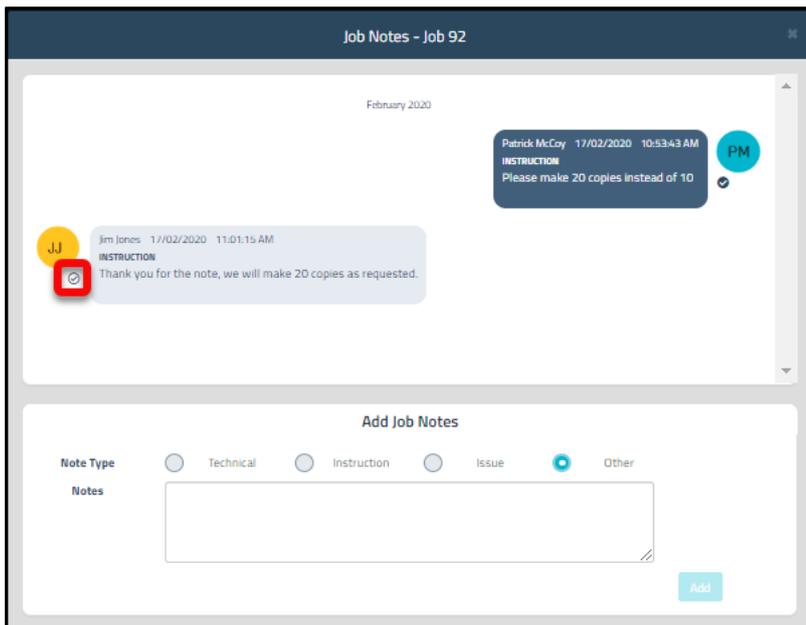
Emails will be sent to alert the nominated job stakeholders to the new Job Note as follows:

- 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**



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

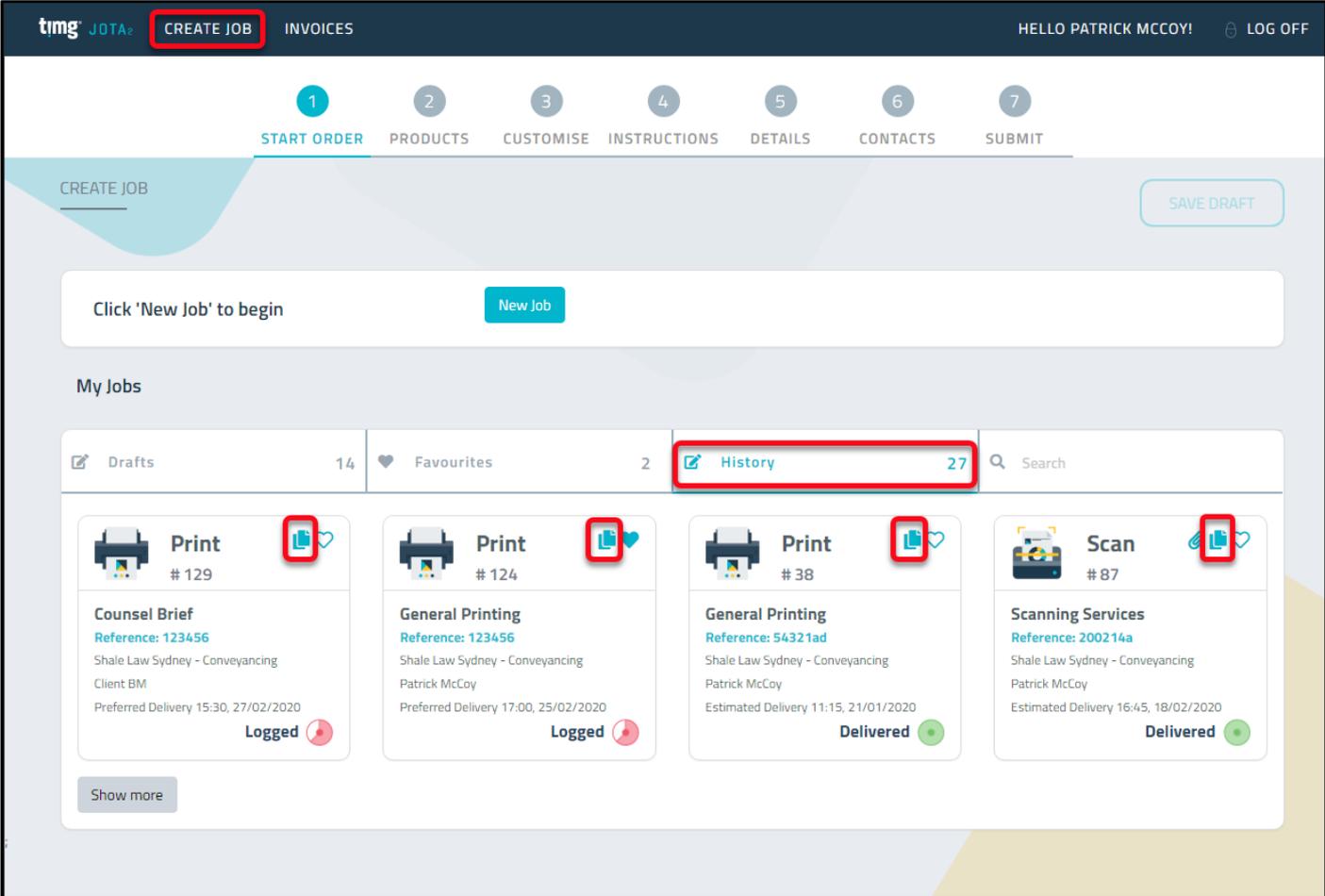


Duplicate Job

The duplicate icon  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.



The screenshot shows the 'timg JOTA2' interface. At the top, there's a navigation bar with 'CREATE JOB' highlighted in a red box. Below it, a progress bar shows steps 1 to 7: START ORDER, PRODUCTS, CUSTOMISE, INSTRUCTIONS, DETAILS, CONTACTS, and SUBMIT. The main content area is titled 'CREATE JOB' and includes a 'SAVE DRAFT' button. A prompt says 'Click 'New Job' to begin' with a 'New Job' button. Under 'My Jobs', there are tabs for Drafts (14), Favourites (2), and History (27), with 'History' highlighted in a red box. Below the tabs are four job cards. The first three cards have a duplicate icon (two overlapping document icons) highlighted with a red box. The first card is 'Counsel Brief #129' (Logged), the second is 'General Printing #124' (Logged), and the third is 'General Printing #38' (Delivered). The fourth card is 'Scanning Services #87' (Delivered).

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.

CREATE JOB / CUSTOMER SAVE DRAFT

To begin a new job choose your company

Location: Sydney
Client Name: Shale Law Sydney - Conveyancing
User Name: Patrick McCoy New Job

My Jobs

Drafts 3 | Favourites 1 | **History 6** | Search

- Scan #41** (Paperclip icon) - Scanning Services, Reference: 20200120a, Shale Law Sydney - Conveyancing, Patrick McCoy, Estimated Delivery 09:15, 21/01/2020
- Print #38** - General Printing, Reference: 54321ad, Shale Law Sydney - Conveyancing, Patrick McCoy, Preferred Delivery 11:45, 21/01/2020
- Copy #36** - General Copying, Reference: 20200117b, Shale Law Sydney - Conveyancing, Patrick McCoy, Preferred Delivery 17:30, 21/01/2020
- Scan #34** - Scanning Services, Reference: [Unknown], Shale Law Sydney - Conveyancing, Jim Jones, Estimated Delivery 22:15, 17/01/2020

Show more

You may have multiple folders and files to access.

EDOCS

Scan item barcode to view

Scanning Services - Shale Law Sydney - Conveyancing : Patrick McCoy

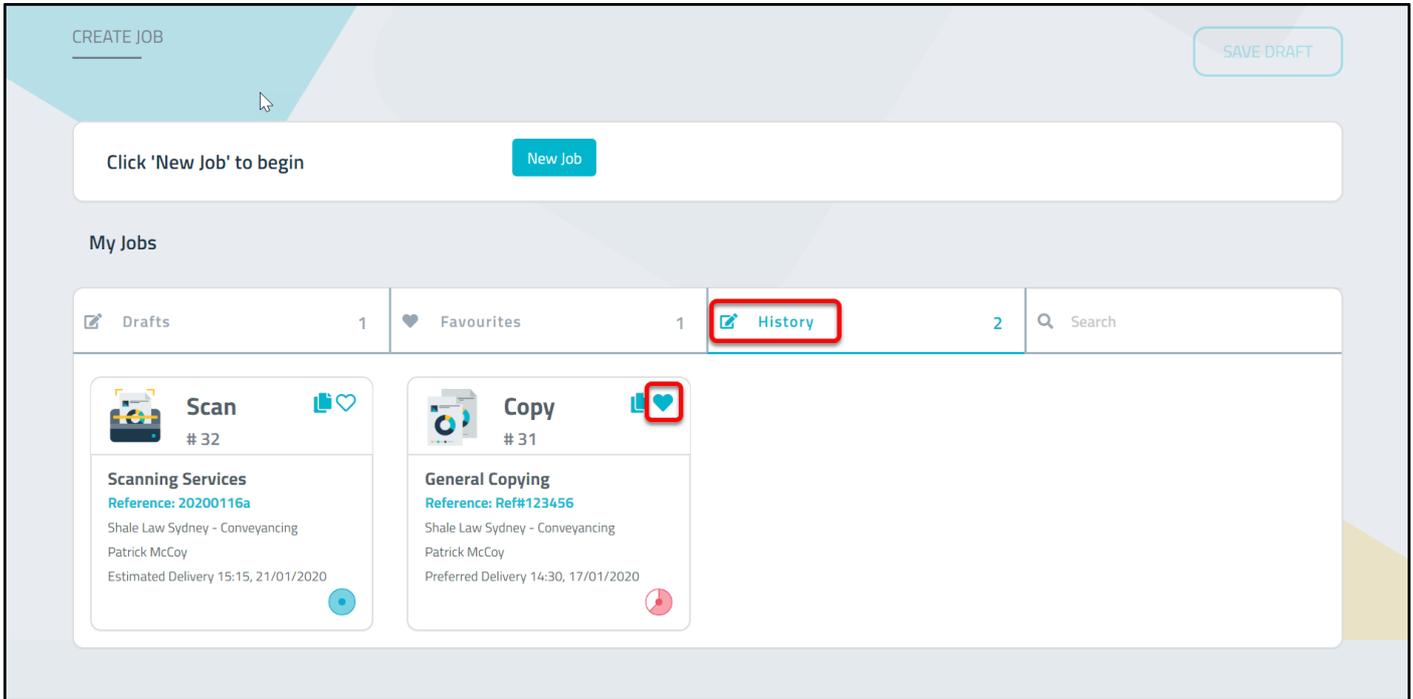
Folder-J2-41-0001

Jota 2 Client How to Guide V1.1.pdf Remove

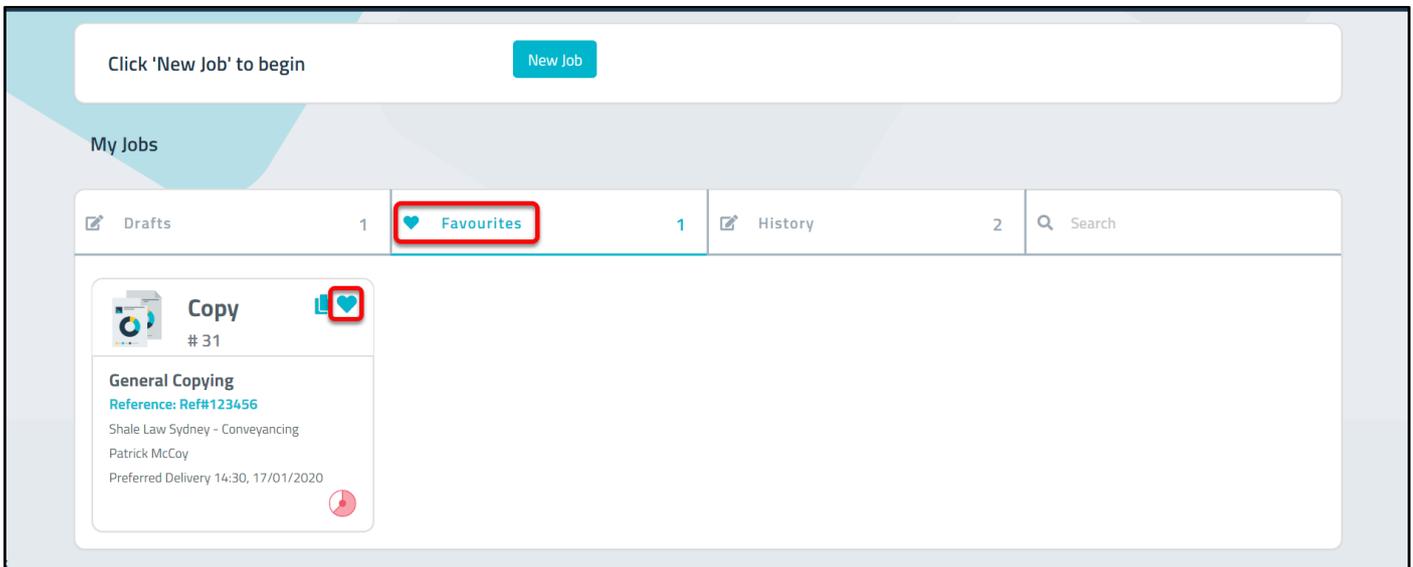
Job Favourites

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

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



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



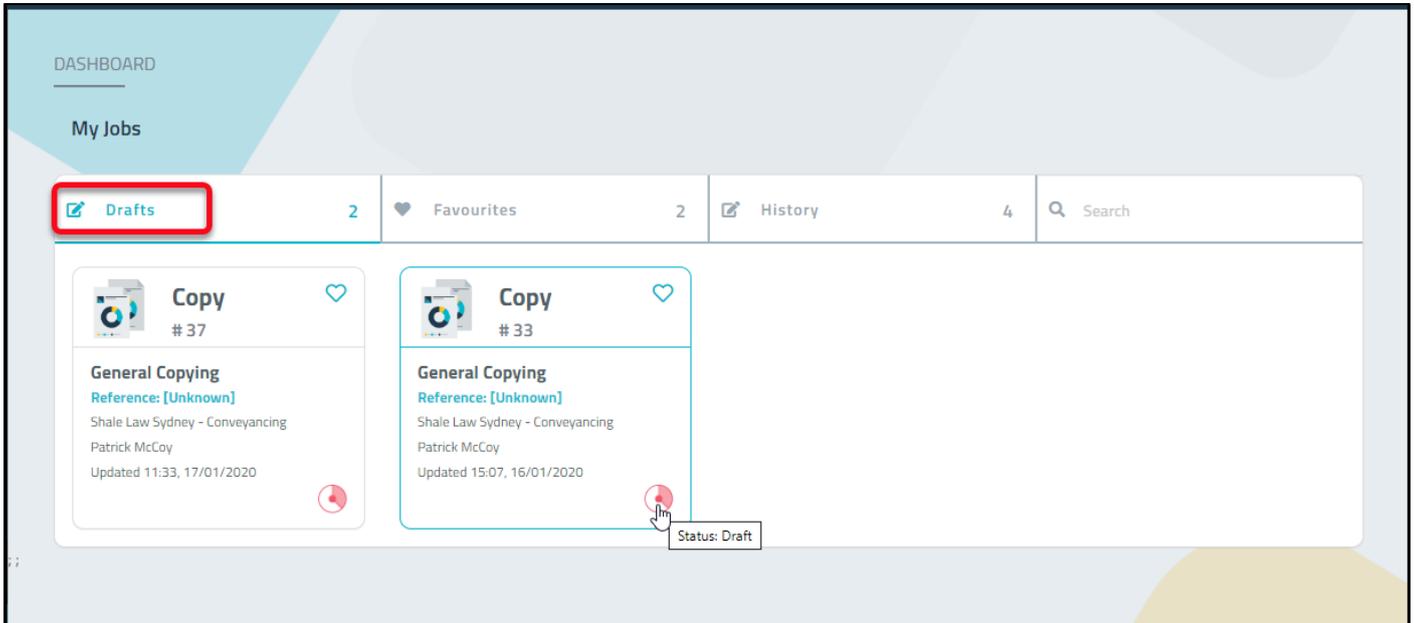
To remove jobs from your favourites, unselect the heart icon.



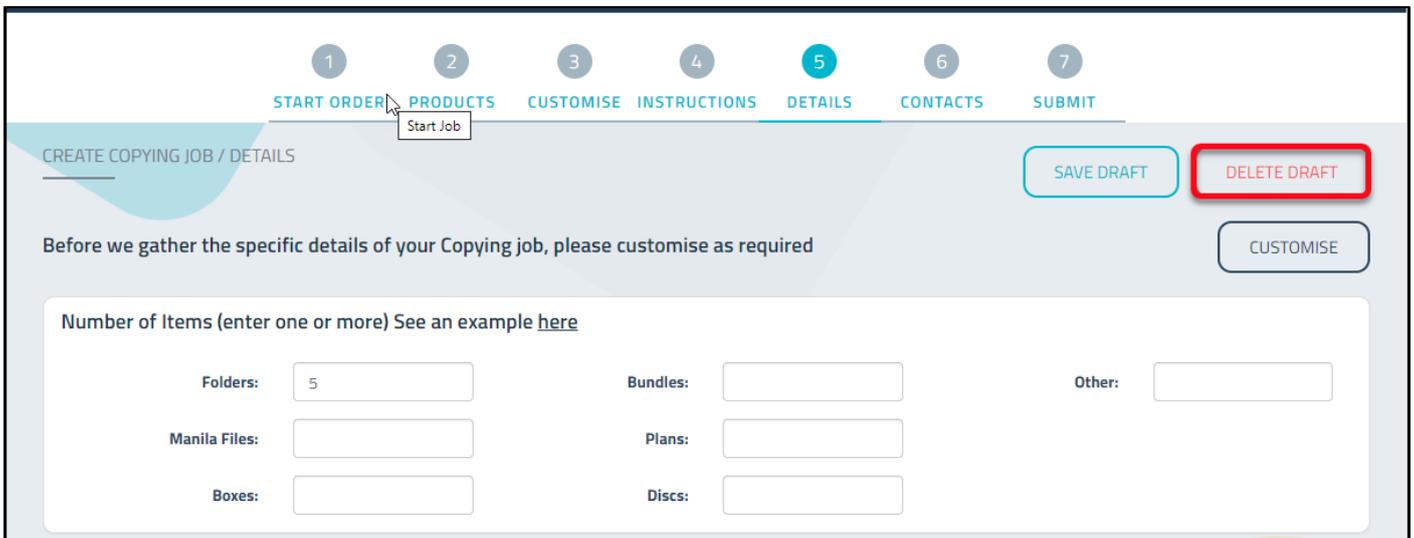
Job Drafts

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.



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



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

tmg JOTA₂ CREATE JOB **INVOICES** HELLO PATRICK MCCOY! LOG OFF

INVOICES

1 Date From **2** Date To
Minium Amount Maximum Amount
3 Invoice Number **4** Job Id **5** Invoice Type All

Clear

Job Id	Invoice No	Invoice Date	Total	Type	Download
38	INV400124	01/01/2020	\$187.00	Standard	<input type="button" value="Download"/>
38	000001	01/01/2020	\$187.00	Credit Note	<input type="button" value="Download"/>
62	INV400125	31/01/2020	\$125.40	Standard	<input type="button" value="Download"/>
87	INV400123	31/01/2020	\$119,614.00	Standard	<input type="button" value="Download"/>

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.

Copy

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.