

JOTA2

Client How to Guide

Need help?

Contact your Local Bureau: 1300 548 787



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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

NB: The first time you log into JOTA2, you will need to create a JOTA2 password using **Reset Password**.

timg JOTA2 REGISTER HELP LOG IN

timg JOTA2

Welcome back!

Email
jjones@test.timg.com

Password

Forgot Password?

Sign in

Register as a new user

Moving to JOTA2

It's easy!

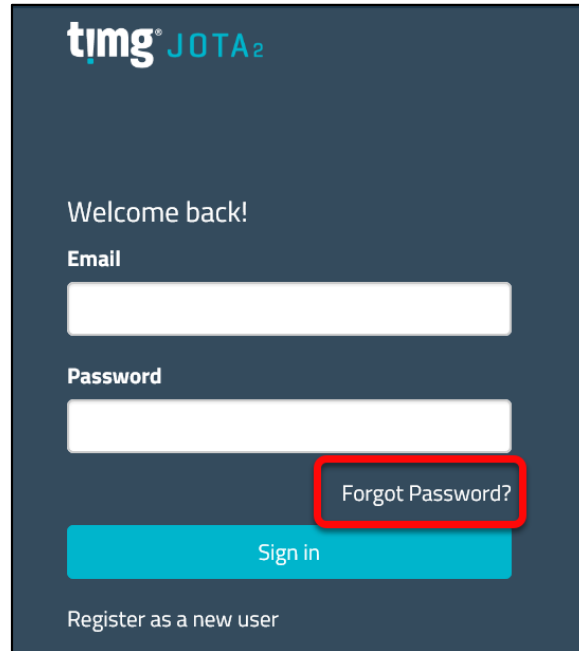
First you need to reset your JOTA password.

RESET PASSWORD

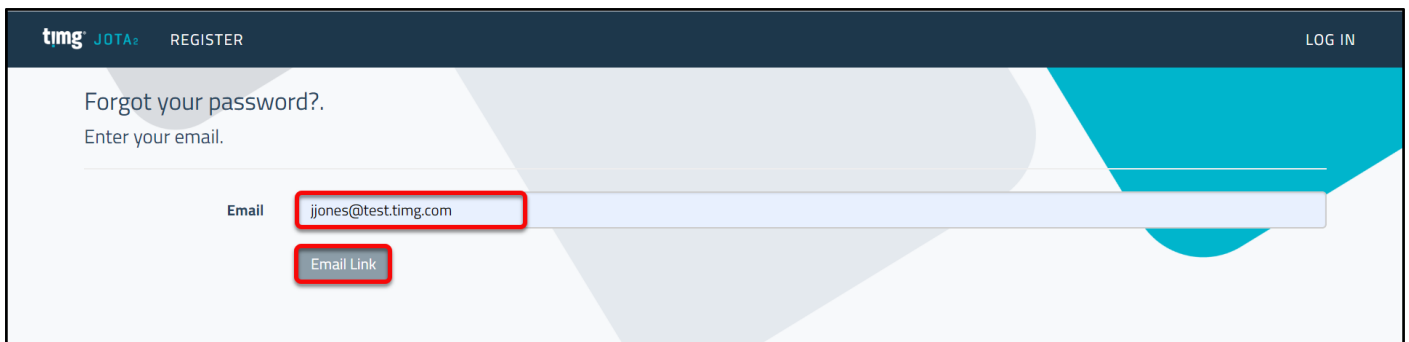
Forgot Password?

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**

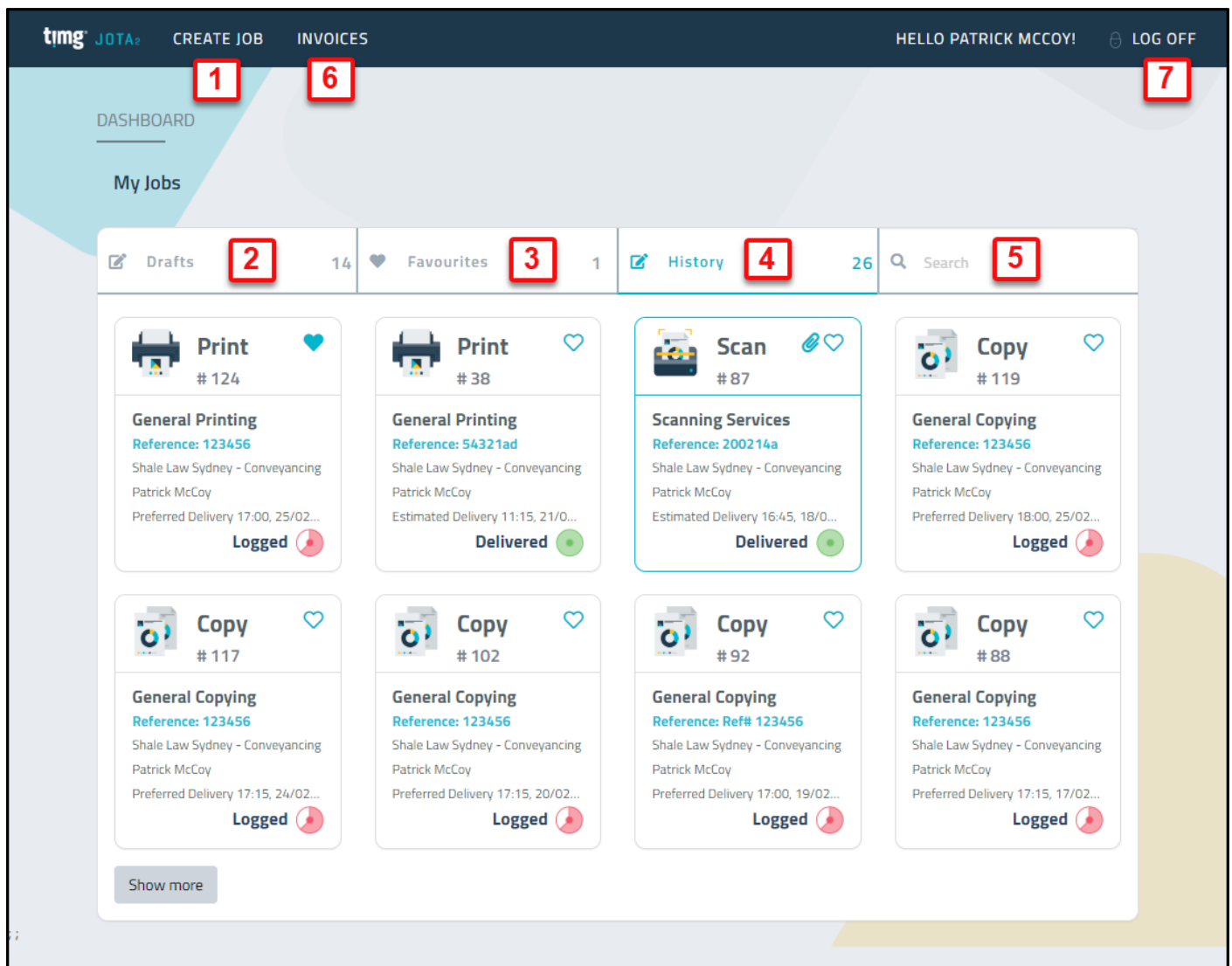


- If the email address is active, a password email link will be sent to you to reset your JOTA2 password.

Dashboard

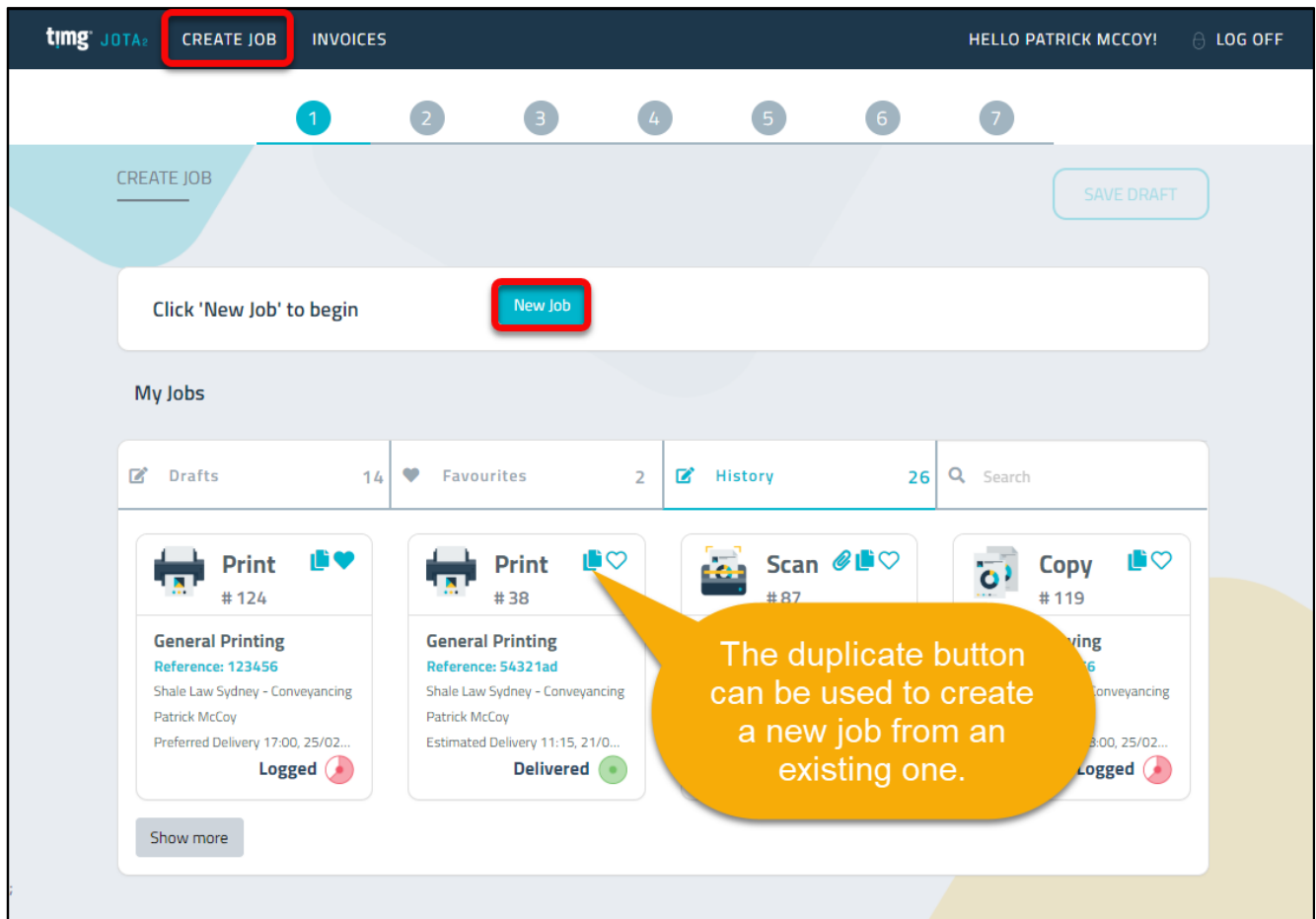
Once logged into JOTA2 you will see the **DASHBOARD** screen showing:

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

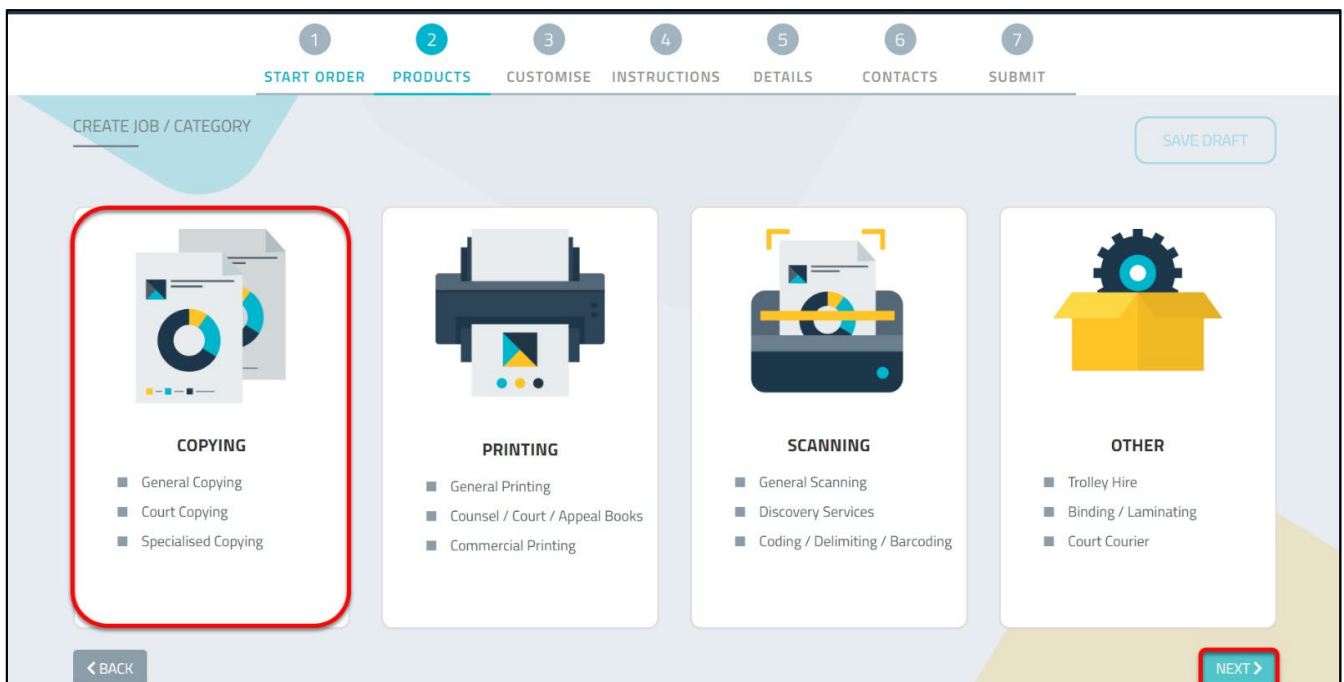


Create Job

- **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

1 START ORDER 2 PRODUCTS 3 CUSTOMISE 4 INSTRUCTIONS 5 DETAILS 6 CONTACTS 7 SUBMIT

CREATE COPYING JOB / DETAILS

Before we gather the specific details of your Copying job, please customise as required

Number of Items (enter one or more) See an example [here](#)

Folders: 2 Bundles: Other: Manila Files: Plans: Boxes: 1 Discs:

Number of Copies

Copies Required: 10

Paginated Copying Remove

Paginate: ☒ Copies Only ☐ Originals

Position of label on page: ☐ Top Left ☐ Top Centre ☐ Top Right ☒ Bottom Left ☐ Bottom Centre ☐ Bottom Right

Number sequence: ☒ Continuously across folders ☐ Start each folder from 1

Format of number: ☒ 1, 2, 3, ... ☐ 001, 002, 003, ... ☐ PREFIX-001, PREFIX-002, PREFIX-003, ... ☐ Specify other:

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**

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

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

Job Contacts

Operator + [edit]
 Operator MW

Finance Manager x + [edit]
 Do

- ☐ Pickup
- ☐ Technical Questions
- ☐ Status Updates
- ☐ Delivery
- ☒ Invoice

Responsibilities for Processing and Delivery

Drag and drop contact from above to relevant responsibility

Logged By	Pickup	Status Updates	Delivery	Invoice
Operator MW	Operator MW x	Operator MW x	Operator MW x	Operator MW x

Donald Scrooge x

Navigation: ← BACK 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.

Job Timing

TIMG offers an on-demand service. We strive to deliver every job on time as requested. By giving us an indication of how flexible your delivery timeframe is, you allow us to provide you the best possible price while still meeting your needs.

While we promise to make every effort to meet your requested time frame, it would help us to know whether your turnaround time frame is:

Delivery Timing:

- ☐ Flexible
- ☒ Limited Flexibility
- ☐ Urgent

Preferred Delivery Time October 22, 2019 4:00 PM

Calendar: October 2019

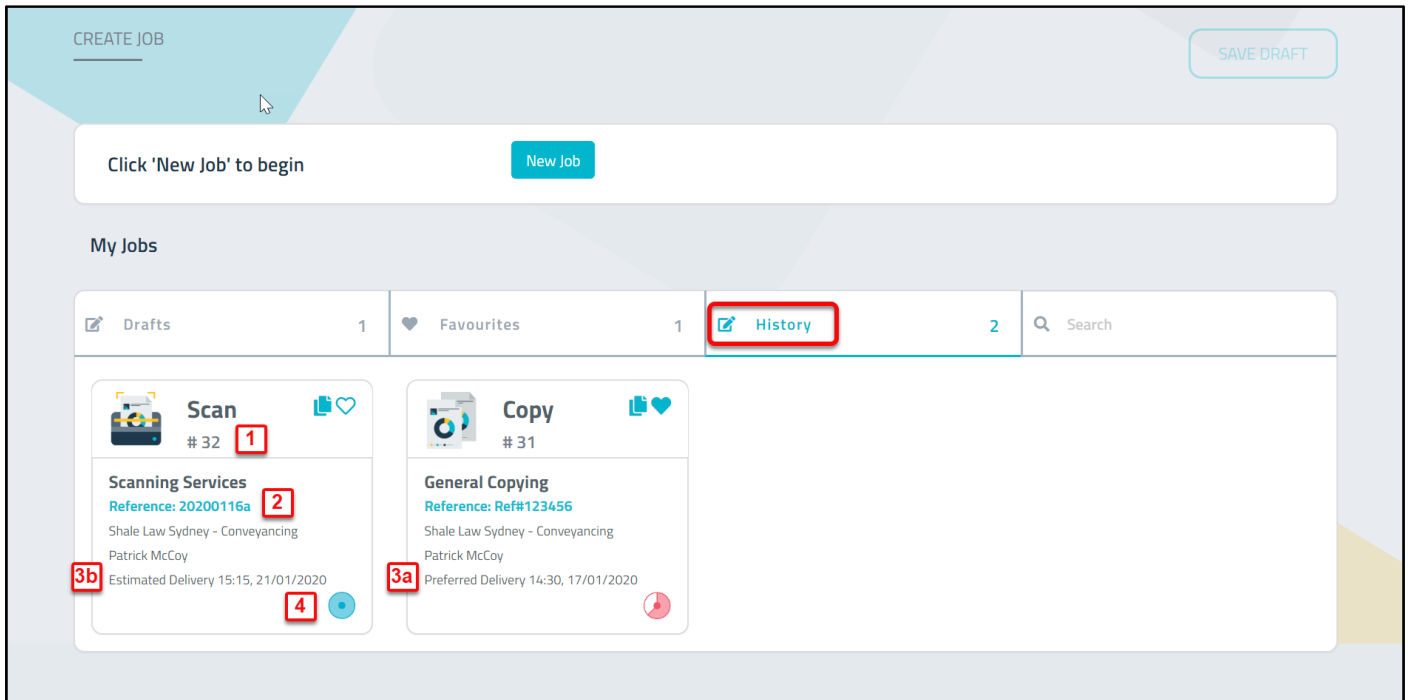
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Navigation: ← BACK SAVE DRAFT SUBMIT JOB

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**

1 2 3 4 5 6 7
START ORDER PRODUCTS CUSTOMISE INSTRUCTIONS DETAILS CONTACTS SUBMIT

VIEW COPYING JOB #92 / DETAILS

Before we gather the specific details of your Copying job, please customise as required

Number of Items (enter one or more) See an example [here](#)

Folders: 1 Bundles: Other:

Manila Files: Plans:

Boxes: Discs:

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

Job Notes - Job 92

February 2020

Patrick McCoy 17/02/2020 10:53:43 AM
INSTRUCTION
Please make 20 copies instead of 10

Jim Jones 1/7/02/2020 11:01:15 AM
INSTRUCTION
Thank you for the note, we will make 20 copies as requested.


Add Job Notes

Note Type: Technical Instruction Issue Other

Notes

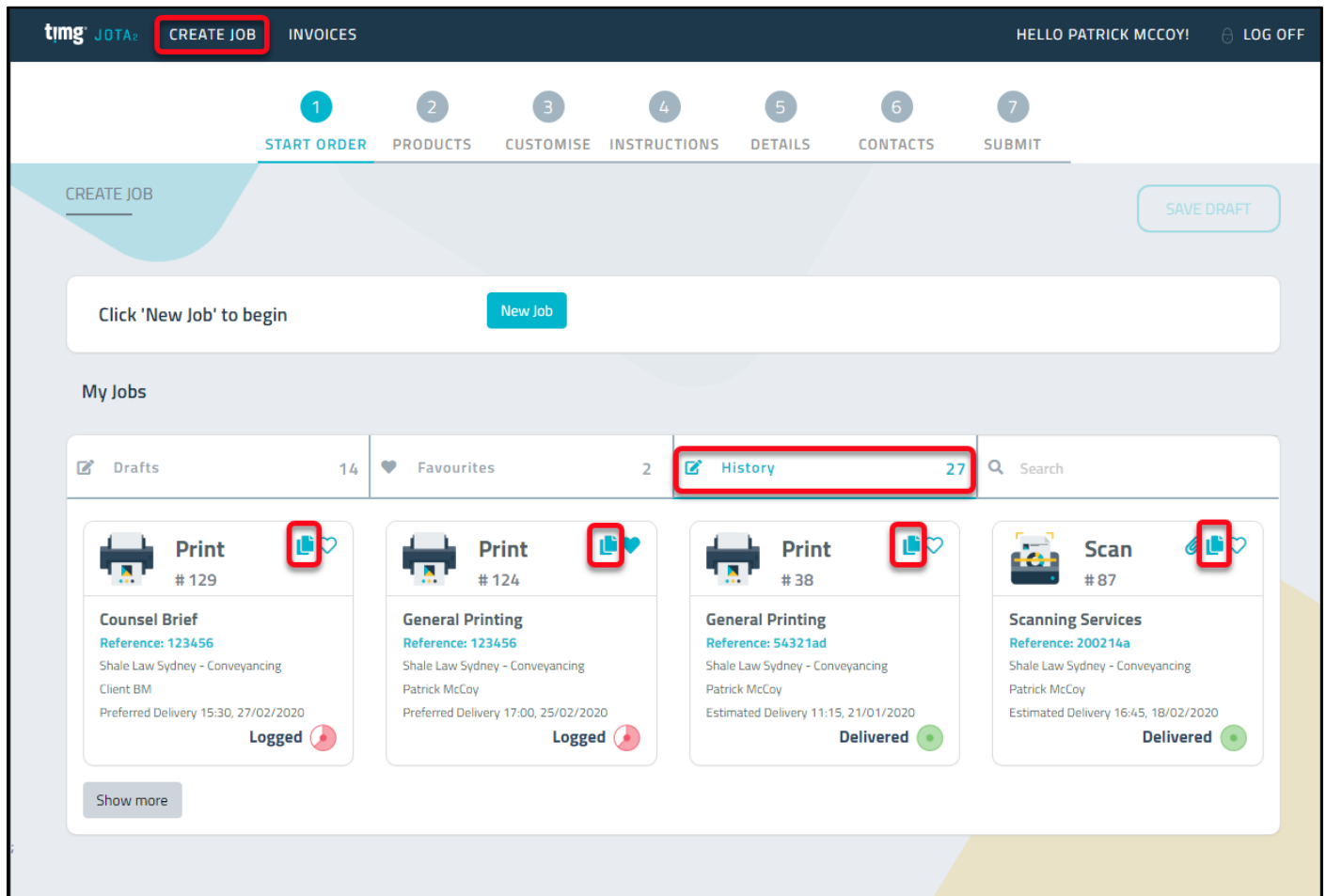
Add

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 this is a progress bar with steps 1 to 7: START ORDER, PRODUCTS, CUSTOMISE, INSTRUCTIONS, DETAILS, CONTACTS, and SUBMIT. The main section is titled 'CREATE JOB' and includes a 'SAVE DRAFT' button. A prompt says 'Click 'New Job' to begin' with a 'New Job' button. Below this is the 'My Jobs' section, which has tabs for Drafts (14), Favourites (2), and History (27). The 'History' tab is highlighted with a red box. Under the 'History' tab, there are four job cards. Each card has a duplicate icon (document with plus sign) highlighted with a red box. The jobs are: 'Counsel Brief' (Print #129, Logged), 'General Printing' (Print #124, Logged), 'General Printing' (Print #38, Delivered), and 'Scanning Services' (Scan #87, Delivered). Each card also shows a reference number, client name, and delivery details.

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

Drafts3

Favourites1

History6

Search

Scan# 41

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

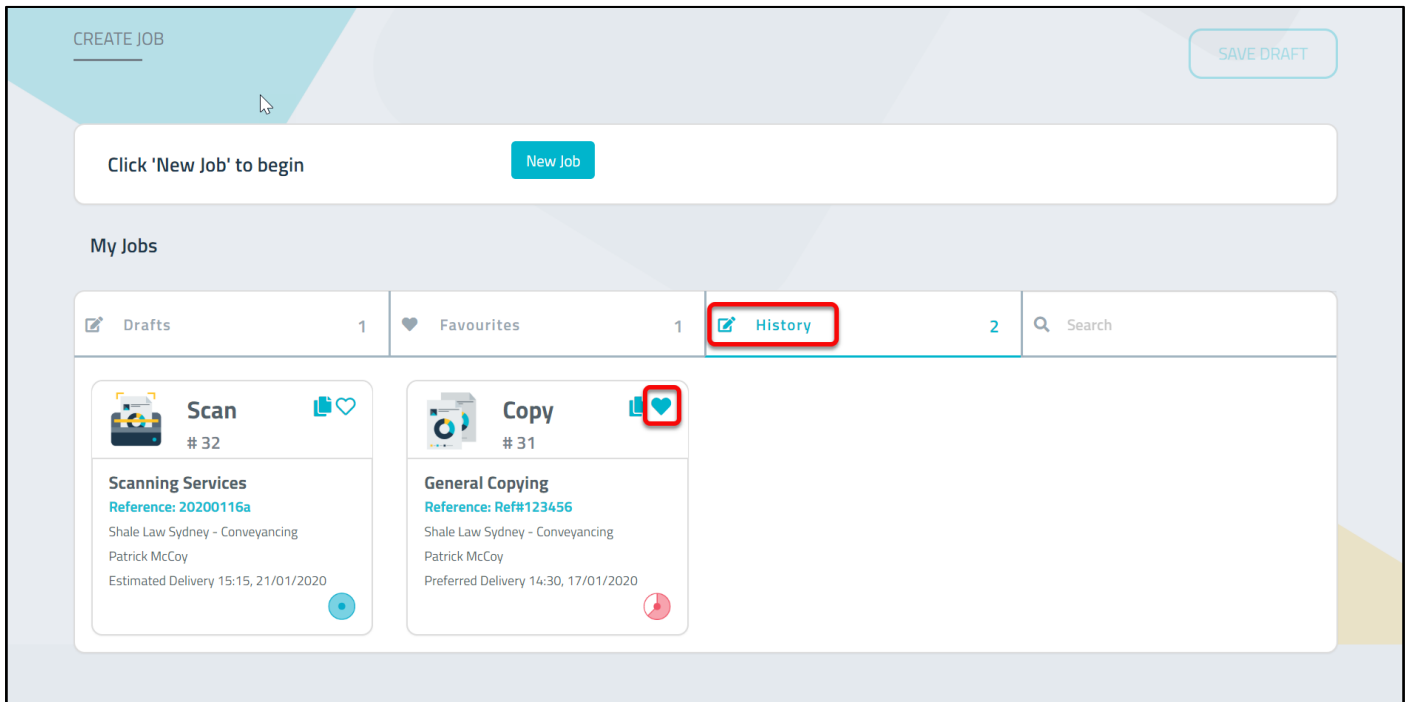
Folder-J2-41-0001

Jota 2 Client How to Guide V1.1.pdfRemove]

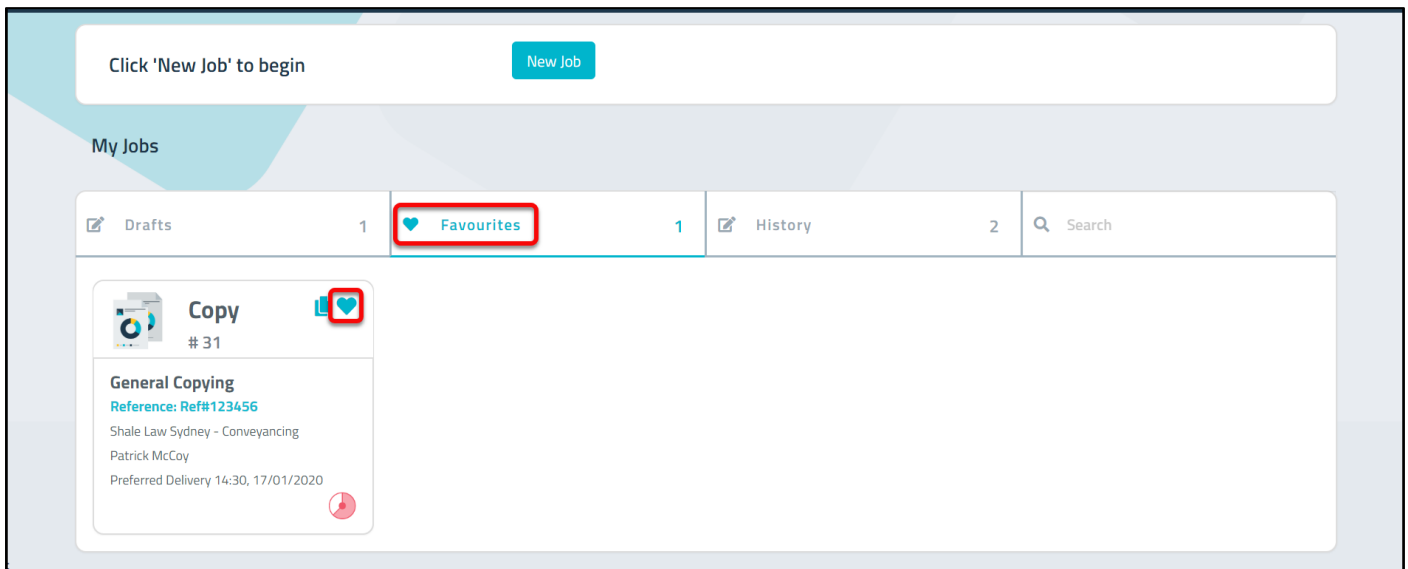
Job Favourites

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.

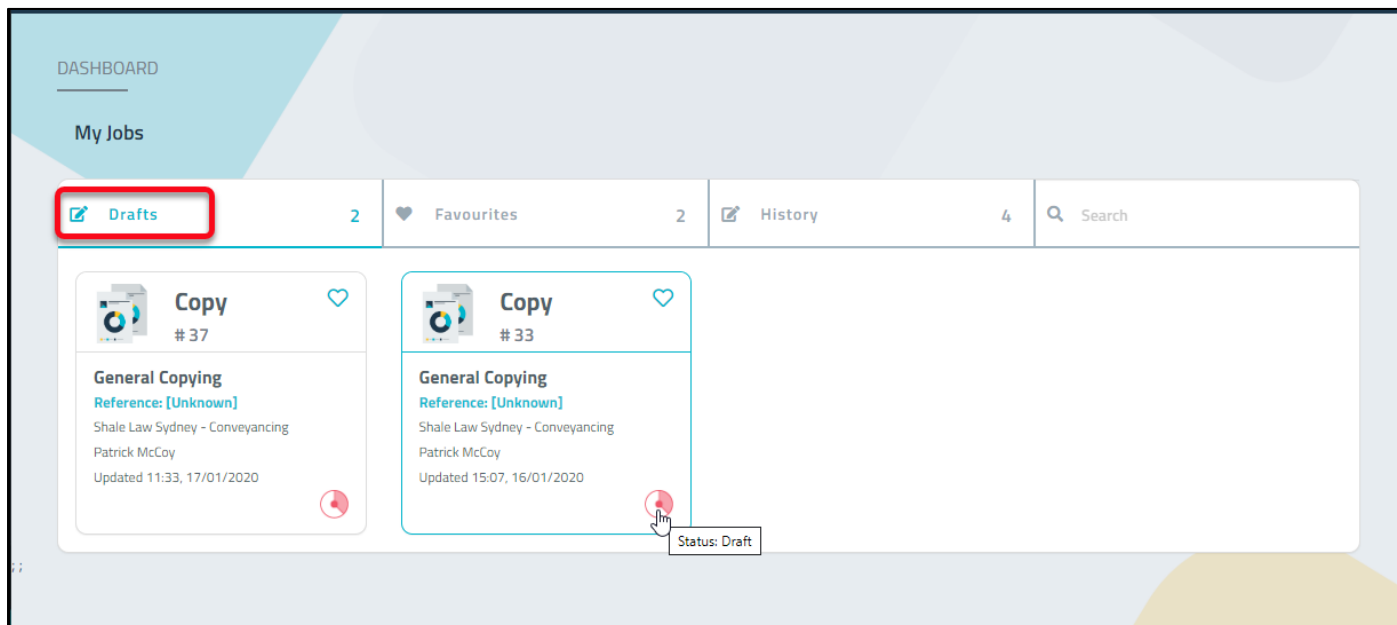


To remove jobs from your favourites, unselect the heart icon. 

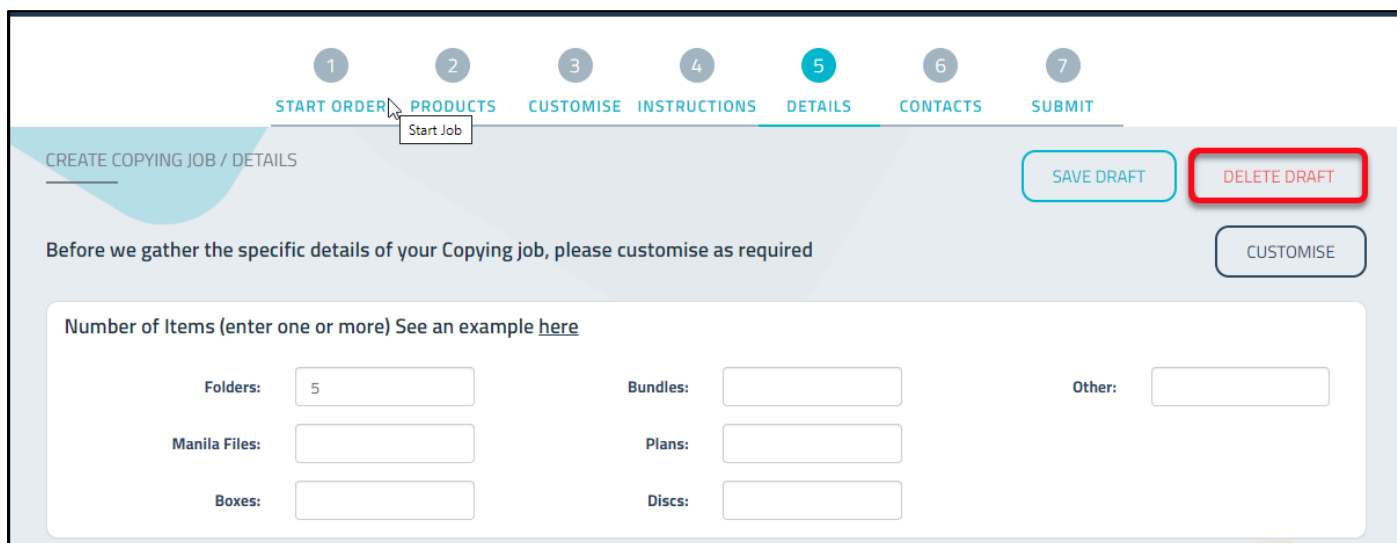
Job Drafts

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.

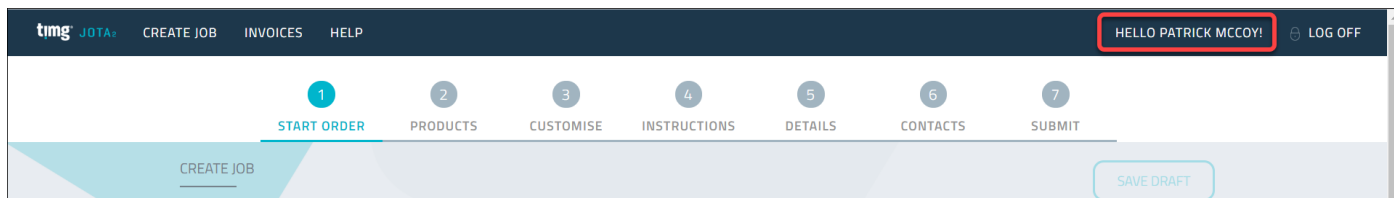


Buddy Users

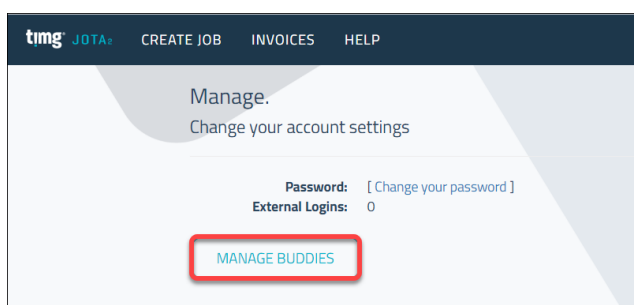
A buddy is a JOTA2 user who is allowed to view your draft and submitted jobs.

You can add one or many buddies, to give them access to your jobs.

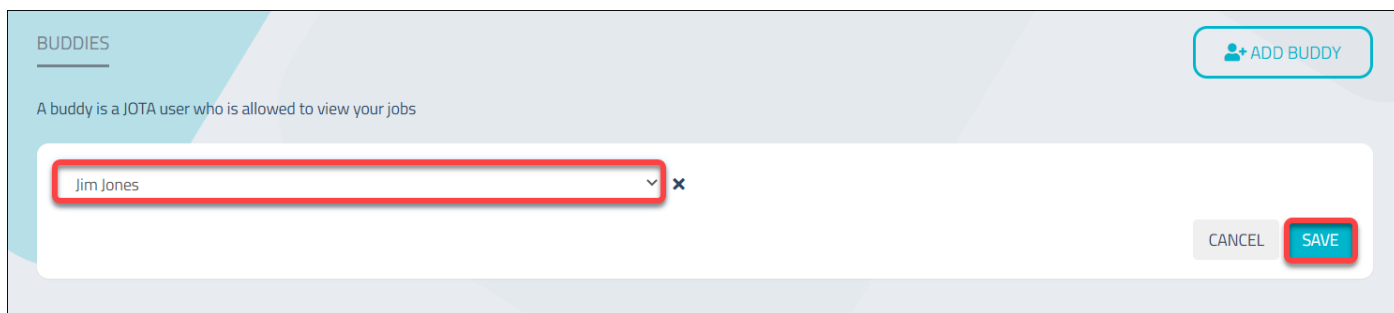
- Click on your name



- Click **Manage Buddies**

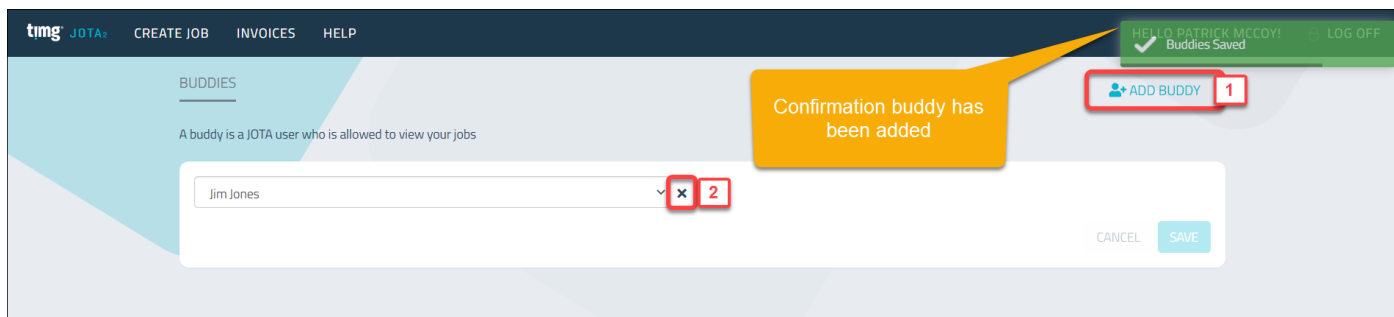


- Select your buddy, then **SAVE**



After adding a buddy, you can then:

1. Add another buddy by selecting **Add Buddy**.
2. Remove the buddy by selecting the 'X' and this will remove their access to your jobs.



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

The screenshot shows the 'INVOICES' section of the timg JOTA2 application. The top navigation bar includes the timg logo, 'JOTA2', 'CREATE JOB', and a highlighted 'INVOICES' tab. The user is logged in as 'HELLO PATRICK MCCOY!' with a 'LOG OFF' link. The main content area is titled 'INVOICES' and contains a search form with five numbered callouts: 1. 'Date From' and 'Date To' date pickers; 2. 'Minimum Amount' and 'Maximum Amount' input fields; 3. 'Invoice Number' input field; 4. 'Job Id' input field; 5. 'Invoice Type' dropdown menu (currently set to 'All'). There are 'Clear' and 'Search' buttons. Below the search form is a table of invoices with columns: Job Id, Invoice No, Invoice Date, Total, Type, and Download. The first row is highlighted, and its 'Download' icon is circled in red. The table has a pagination bar at the bottom with 'First', 'Previous', '1' (selected), 'Next', and 'Last' buttons, and a 'Page Size' dropdown set to '10'.

Job Id	Invoice No	Invoice Date	Total	Type	Download
38	INV400124	01/01/2020	\$187.00	Standard	
38	000001	01/01/2020	\$187.00	Credit Note	
62	INV400125	31/01/2020	\$125.40	Standard	
87	INV400123	31/01/2020	\$119,614.00	Standard	

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.