JOTA2®

Client How to Guide

Need help?

Contact your Local Bureau: 1300 548 787



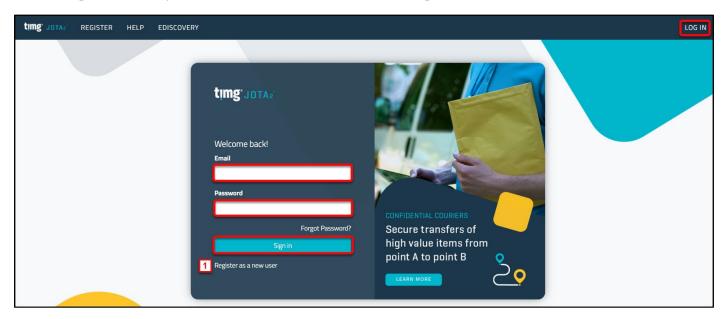
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Accessing JOTA2®

- Go to: https://jota2.timg.com/
 NB: JOTA2® works best with Chrome but is compatible with all web browsers, including Internet Explorer 11 or greater.
- Log In → Enter your Email Address and Password → Sign In



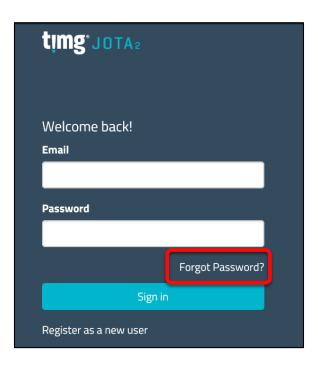
1. If you are new to JOTA2® please **Register as a new user**. Your registration will be sent to a Bureau Manager for approval. Once approved you will receive an email to create your JOTA2® password and then your JOTA2® account will be active for you to login and use.



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

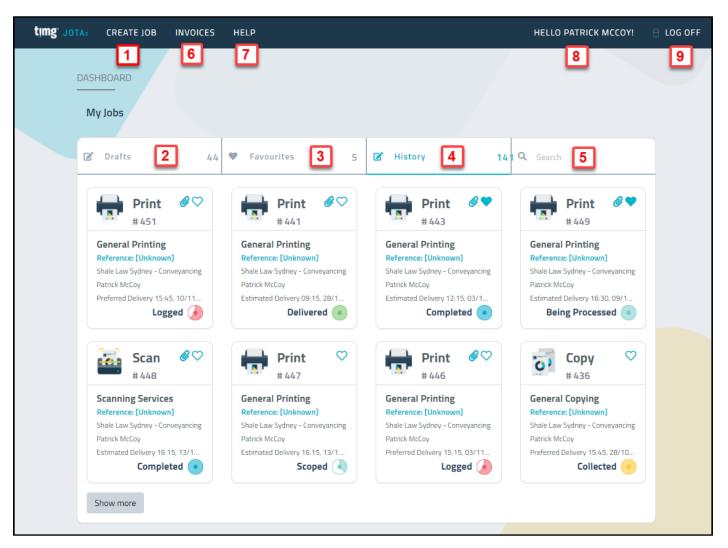


If the email address is active, a password email link will be sent to you to reset your JOTA2® password.

Dashboard

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

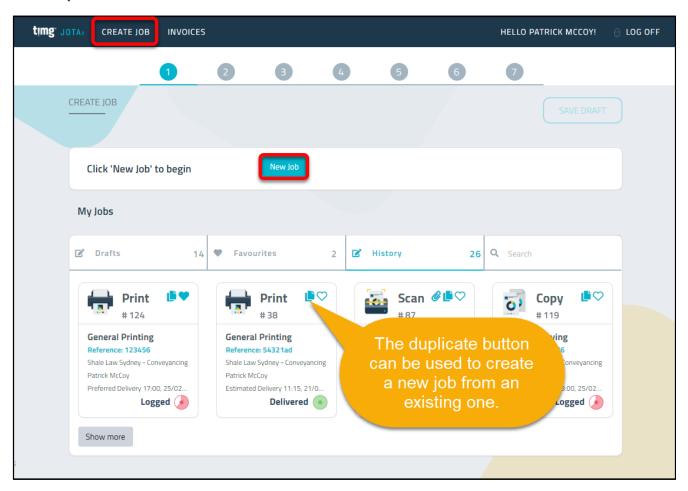
- 1. **CREATE JOB:** menu item to create new jobs and duplicate jobs.
- 2. **Drafts:** to access saved drafts, jobs you started to create but haven't submitted.
- 3. **Favourites:** to access jobs marked as favourites using the heart icon.
- 4. **History:** to access submitted jobs.
- 5. **Search:** use job details to find a job.
- 6. **INVOICES**: menu item to access invoices and credit notes.
- 7. **HELP:** menu item to access the JOTA2® webpage with training resources to help you use JOTA2®.
- 8. **Account Settings:** to access your JOTA2® account settings and change your password or manage your buddies.
- 9. LOG OFF: to exit JOTA2®



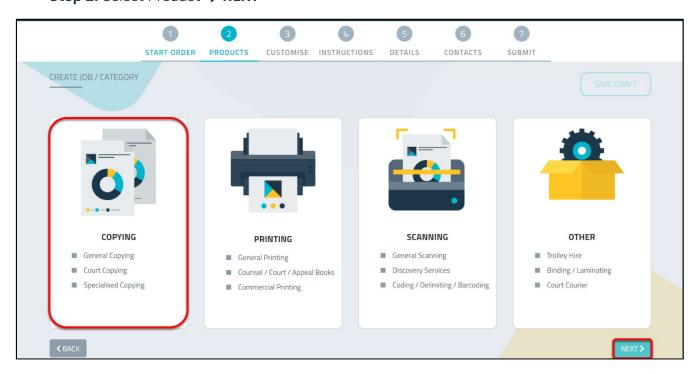


Create Job

Step1: CREATE JOB → New Job

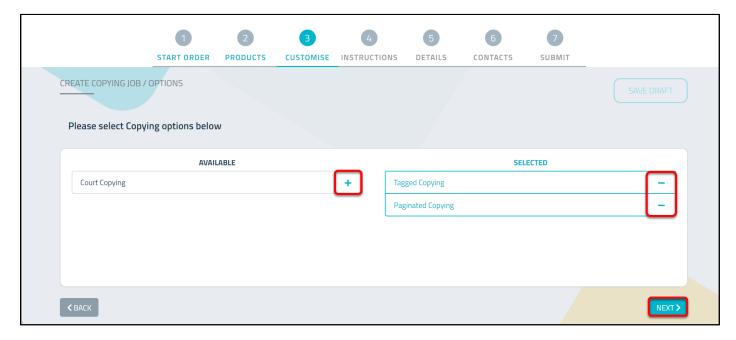


Step 2: Select Product → NEXT

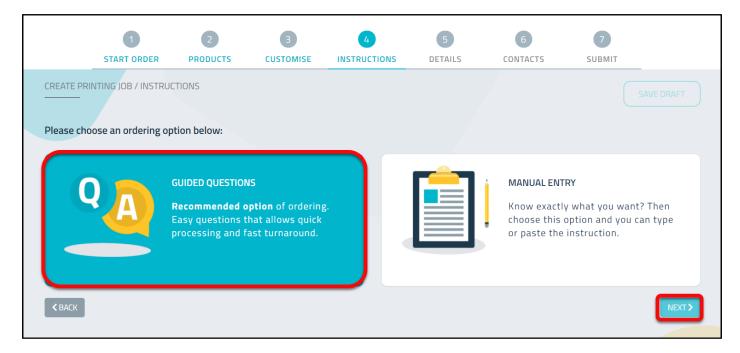




- Step 3: Based on the Product selected, there will be different options available:
 - + To select the option
 - To remove the option
- Select all required options or leave blank if none are required > NEXT

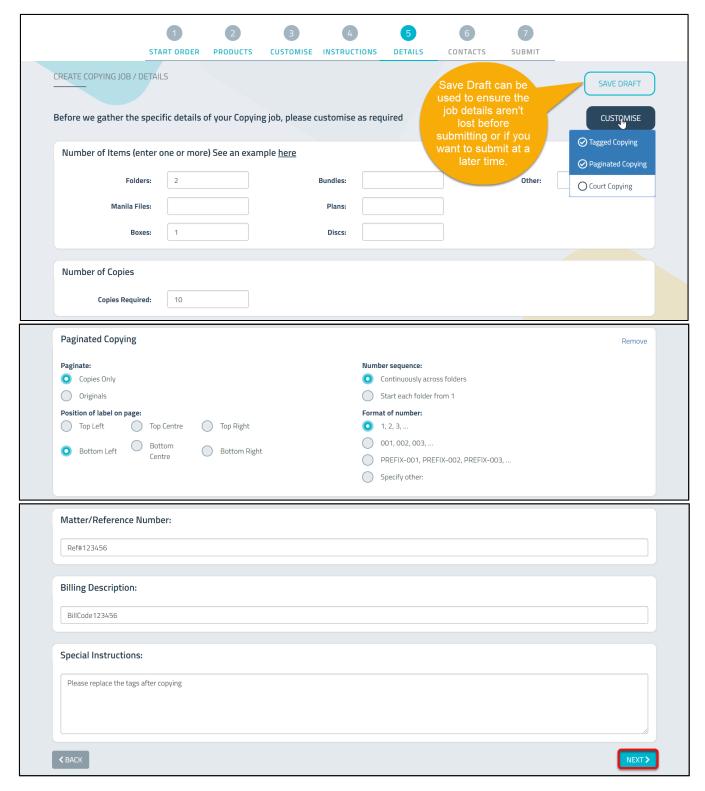


- Step 4: There are 2 ordering instruction options:
 - **GUIDE QUESTIONS** is the recommended option with questions prompting the required information to be entered.
 - MANUAL ENTRY enables instructions to be copied and pasted. This is particularly useful if you have been emailed the job instructions.
- Choose an ordering option → NEXT





- Step 5: The quide 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

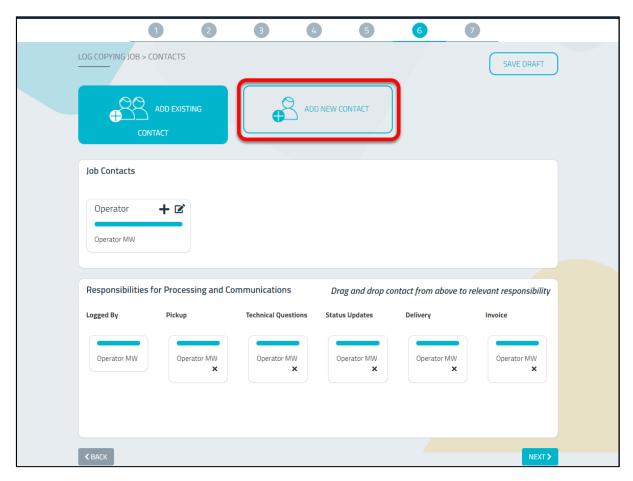


• **Step 6:** By default, you will appear as the person responsible for all processing and communications.

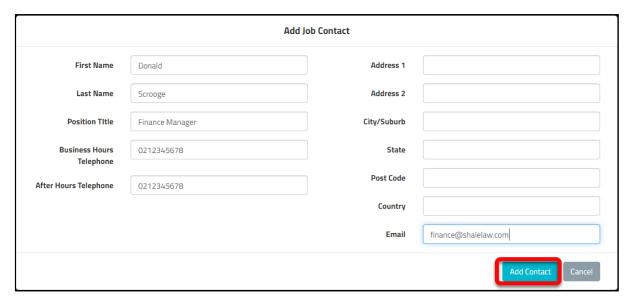
Other contacts can be added, and you can remove yourself from all except Logged By.

NB: There must be at least 1 contact for each responsibility.

ADD NEW CONTACT

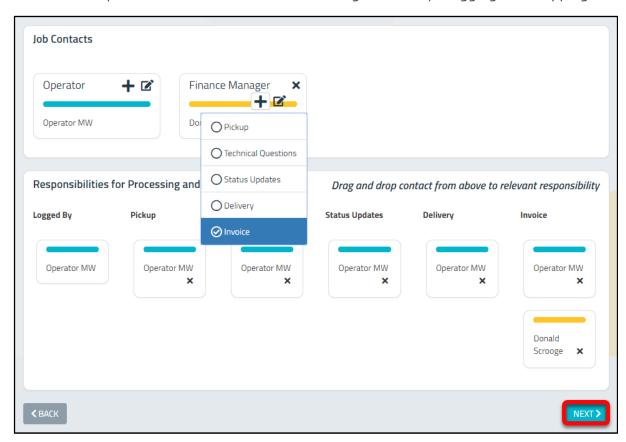


Enter the new contact's details → Add Contact
 NB: Address isn't mandatory but please include it for Pickup and Delivery Contacts.

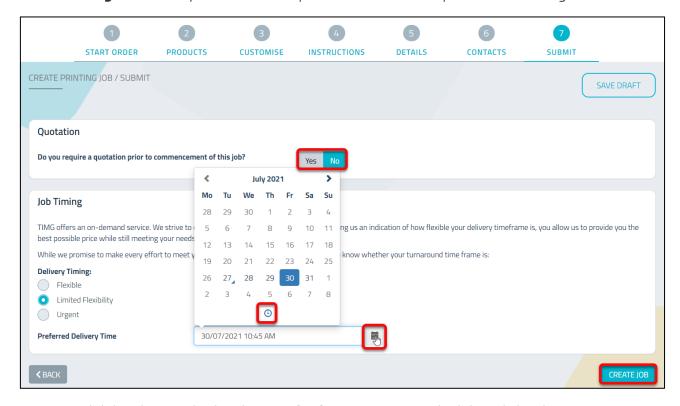




Select the responsibilities for the new contact using the + or by dragging and dropping → NEXT



- Step 7: Enter if a Quote is required, Delivery Timing and Preferred Delivery Time → CREATE JOB
 - o Flexible means your Preferred Delivery Time can be altered by a day or more.
 - o Limited Flexibility means your Preferred Delivery Time can be altered by hours.
 - o **Urgent** means you do not want your Preferred Delivery Time to be changed.

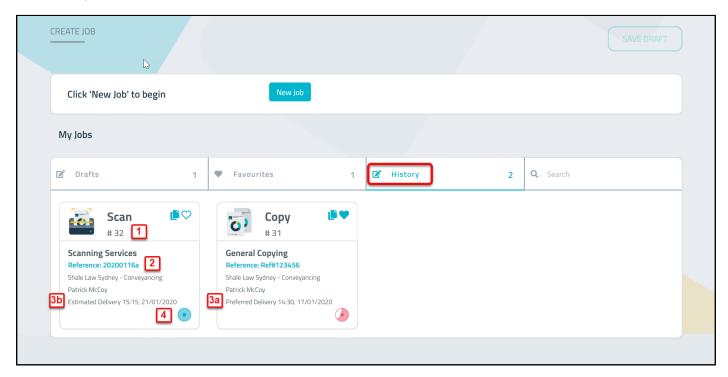


Your job has been submitted, use **Job History** to access the job and view its progress.



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** will display 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.

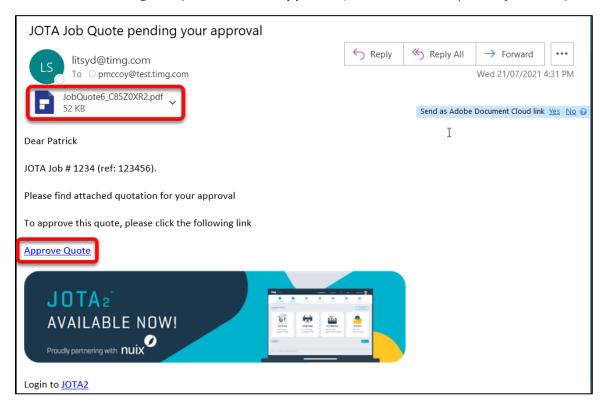
Click on a job to see its full details.



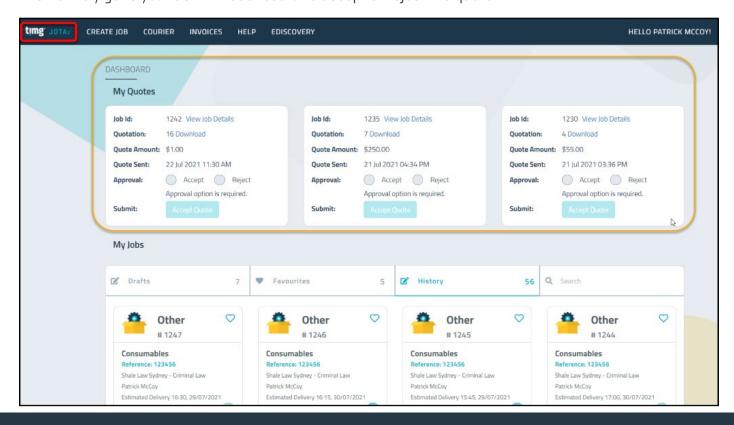
Quote

If you requested a quote when creating a job, you will receive an email with the quote attached and a link to approve or reject the quote.

After viewing the quote click the Approve Quote link to accept or reject the quote.



Alternatively go to your JOTA2® dashboard to accept or reject the quote.

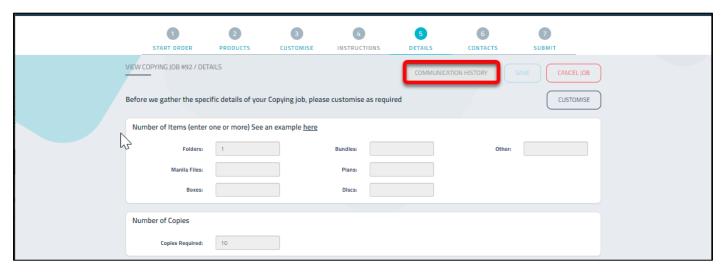




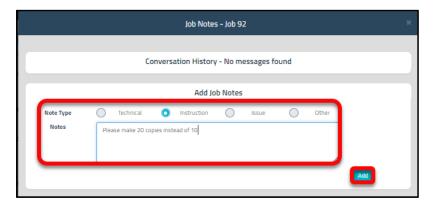
Job Notes & Communication

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

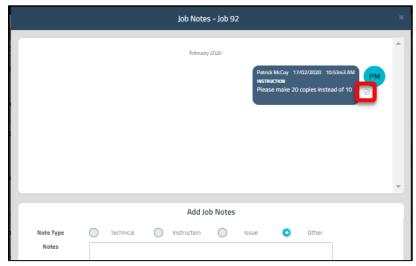
Open an existing job through History or Favourites → COMMUNICATION HISTORY



Select Note Type → Enter Notes → Add



Your Job Note has been added.



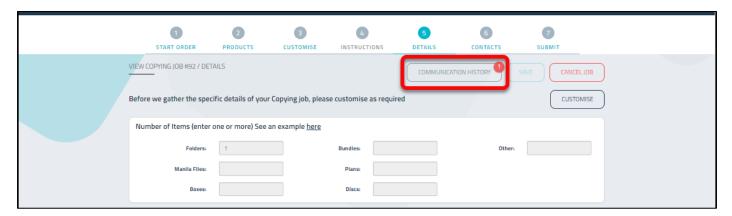
NB: After TIMG staff have read the note, they will mark it as acknowledged.



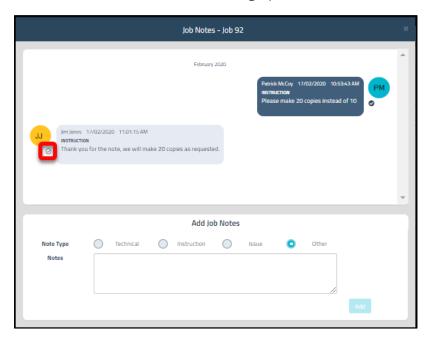
When TIMG staff respond to your Job Note you will see the COMMUNICATION HISTORY flag with an unread job note.

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.

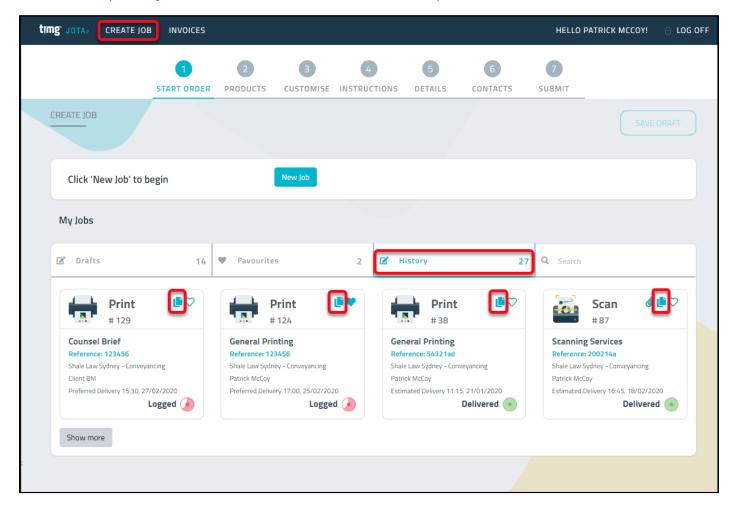




Duplicate Job

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.



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



eDOC Files

eDOC files is the JOTA2® repository for electronic files and can be accessed by a job's Paperclip icon.

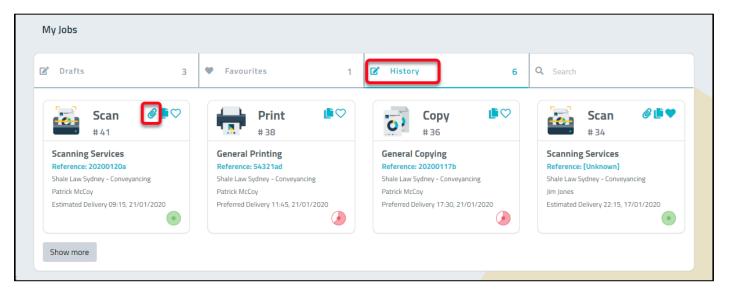


2000MB is the maximum size for <u>each</u> file. If the total job is more than 5GB we recommend providing the files by USB, as it will be faster to upload and download.

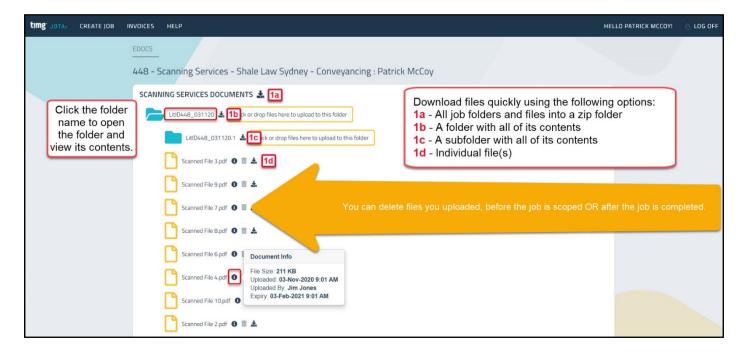
eDOC is particularly useful for:

- 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®. The Paperclip icon will appear when the scanned files are ready.

Tip: For large jobs, zip the files to make upload and download faster.



You may have multiple folders and files to access.





eDOC Share Folder

eDoc share folder enables eDoc files to be shared with other people including non-JOTA2® users.

• Go to the job eDocs → Share folder



- Enter share folder details:
 - 1. **Email** email address of the eDoc share folder recipient to be emailed the eDoc share link.
 - 2. **Password** create a password which the recipient must use to access the eDoc share folder. The password must be **minimum 8 characters**, at least one uppercase letter, one lowercase letter, one number and one special character.

Click the eye icon to show or hide the password.

NB: The password isn't emailed to the person receiving the eDoc share folder email, for security reasons you must provide it separately.

Expiry date – the date the eDoc share folder link will expire.
 The expiry date must be before the earliest expiring eDoc file within the folder.
 Select Send Email



- An email is sent to the recipient with a link to the eDoc share folder.
- You must provide the recipient with the eDoc share folder password you created, so they can access the eDoc folder.



eDoc share folder details can be:

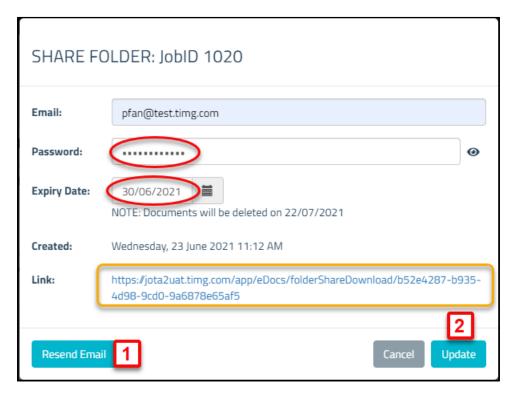
- 1. View, Update (password or expiry date) or Resend Email to recipient.
- 2. **Delete** to stop eDoc share folder access.
- 3. Cancel to close Share Folder window.
- 4. Add New to add another recipient to access the eDoc share folder.



When viewing the eDoc Share Folder details you can:

- 1. **Resend Email** with the eDoc share folder link to the recipient.
- 2. **Update** to save changes to the password or expiry date.

NB: Link can be used to test access to the shared eDoc folder.

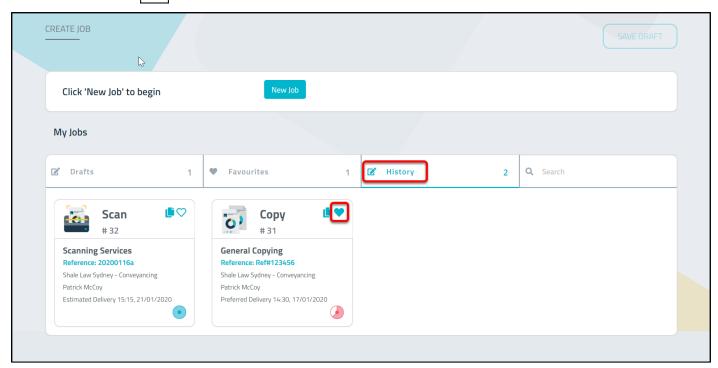




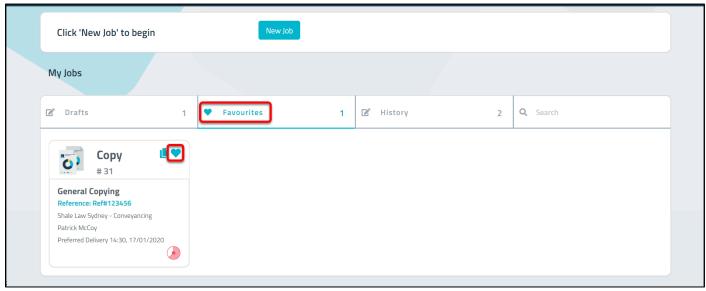
Job Favourites

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.



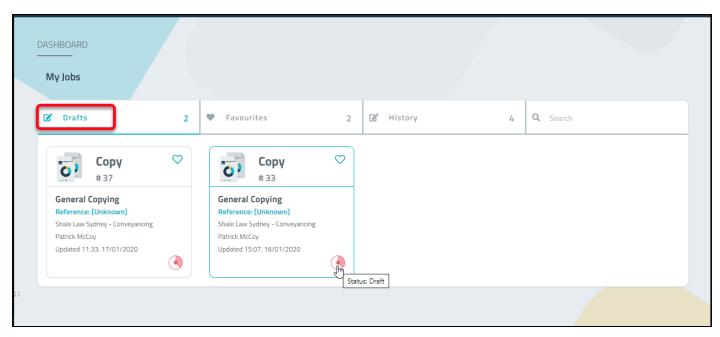
To remove jobs from your favourites, unselect the heart icon.



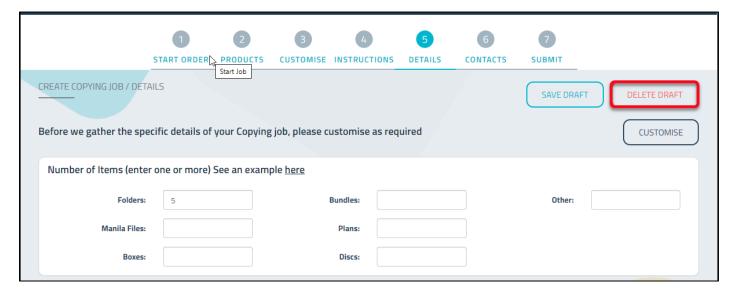
Job Drafts

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.

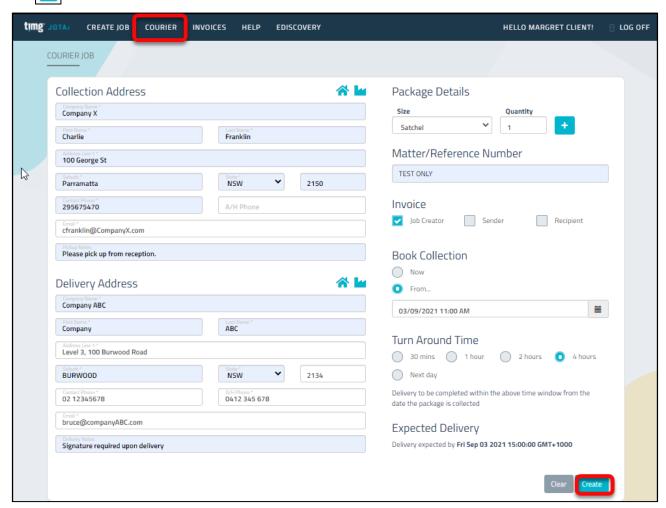




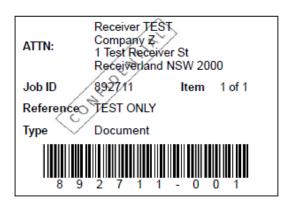
Courier

Courier jobs can be booked for items to be picked up from one location and delivered to another.

- Select COURIER → enter courier job details → CREATE.
 - auto-fills your JOTA2® user address.
 - auto-fills your local TIMG Bureau address.



After TIMG staff accept your Courier job, the barcode(s) will be emailed to the job requestor and collection email address to attach to the item ready for TIMG to pick up.





Buddy Users

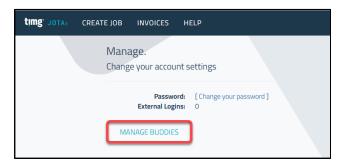
A buddy is a JOTA2® user who can access your draft and submitted jobs.

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

Click on your name.



Click Manage Buddies.



• Click ADD BUDDY → select your buddy → SAVE



Your buddy can now access your jobs, including completing draft job details and submitting them.



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.



Manage Account and Password

Click your name on the top right to manage your account details:

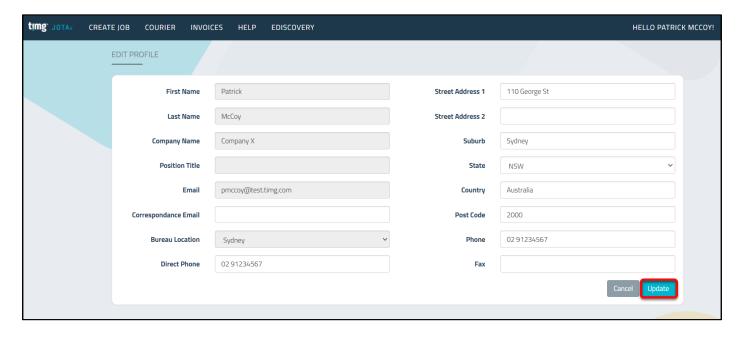
- 1. Change your password
- 2. Edit Profile



In Edit Profile you can update the below details then select Update:

- **Correspondence Email** if you would like JOTA2 email notifications to be sent to a different email address, please enter it here.
- Direct Phone number
- Address
- Phone
- Fax

NB: You cannot update the fields which are greyed out. If these details need to be updated, please advise your local Bureau.





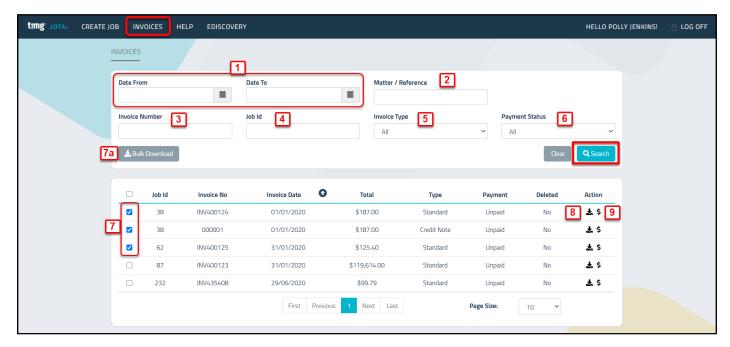
Invoices

- Select INVOICES
- Enter search criteria → Search

Invoices can be searched by:

- 1. Date From & To invoice date range
- 2. Matter / Reference Number
- 3. Invoice Number
- 4. Job ID
- 5. Invoice Type Standard Invoice or Credit Note
- 6. Payment Status

Tip: Click the column header to sort the invoices in ascending or descending order.



- Invoices can be downloaded in:
 - o Bulk select the required invoices [7] then Bulk Download [7a] into a zip folder.
 - o Individually select the download Action icon (8) for the required invoice.
- To pay an invoice by credit card, select the \$ Action icon (9).

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.

