JOTA2®

Client How to Guide

Need help?
Contact your Local Bureau: 1300 548 787
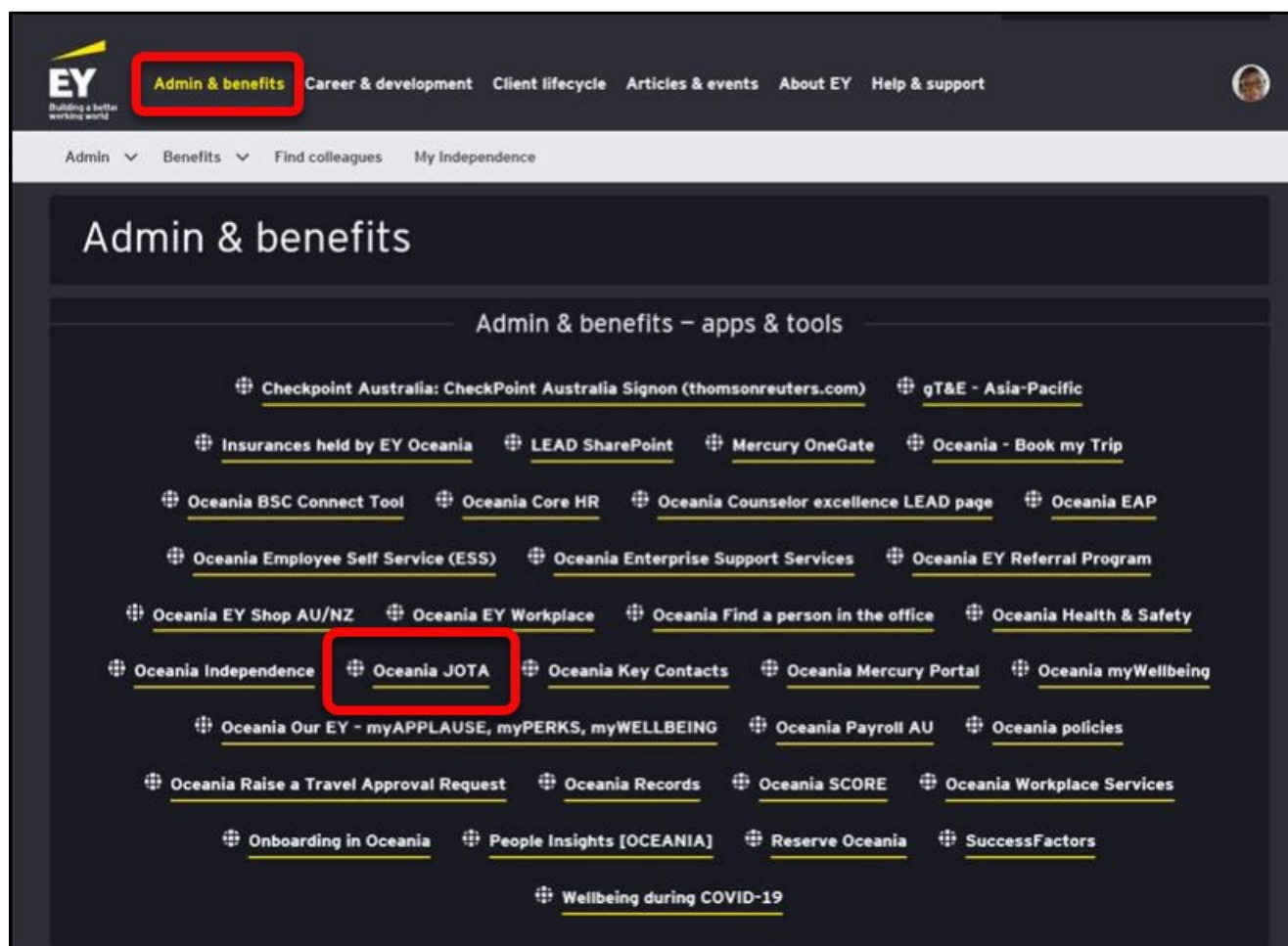
OneService **EY** Building a better working world

t!mg®

Contents

Accessing JOTA2®

Go to the **EY intranet → Admin & benefits → Oceania JOTA**

You will automatically be logged into your JOTA2® account via single sign-on (SSO) using your organisation's network to authenticate your user credentials.

EY provides TIMG with a list of active employees who should have JOTA2® access. This list is imported into JOTA2® to ensure the right user accounts are setup.

If you encounter an error accessing your JOTA2® account, please follow these steps:

1. Contact your organisation's IT team, provide them with a screenshot of the error and request they check you are listed as an active employee on the JOTA2® user file supplied to TIMG.
    If you were missing on the file, once you are added and the file is imported to JOTA2® you will be able to access JOTA2®.
2. If your IT team confirm you are active in the user file, please contact your local Bureau.
    Bureau contact details can be found on the JOTA2® webpage - https://www.timg.com/jota-2/

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. **COURIER**: menu item to submit a courier job.
7. **HELP:** menu item to access the JOTA2® webpage with training resources to help you use JOTA2®.
8. **EDISCOVERY:** menu item to access TIMG's eDiscovery webpage to learn more about these services.
9. **Account Settings:** to access your JOTA2® account settings and manage your buddies.
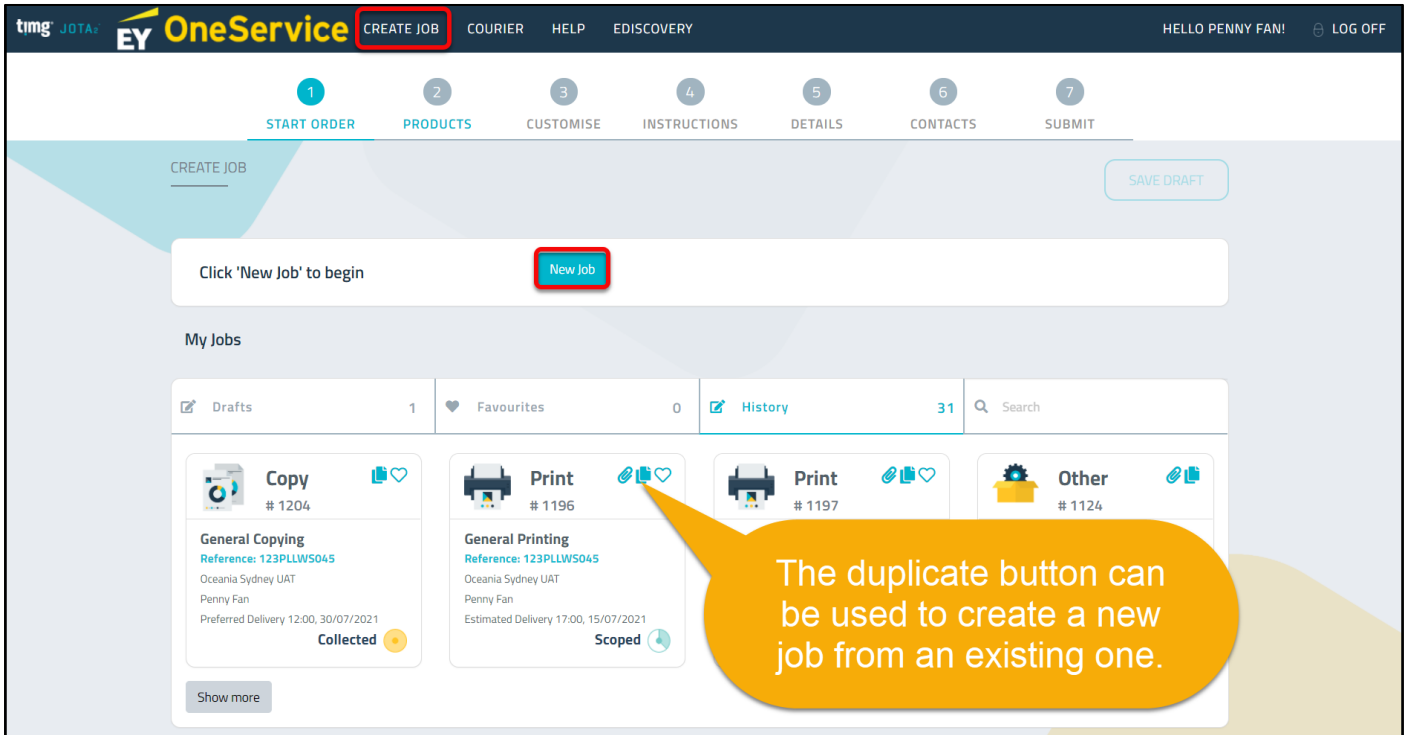10. **LOG OFF:** to exit JOTA2®

NB: JOTA2® works best with Chrome but is compatible with all web browsers, including Internet Explorer 11 or greater.
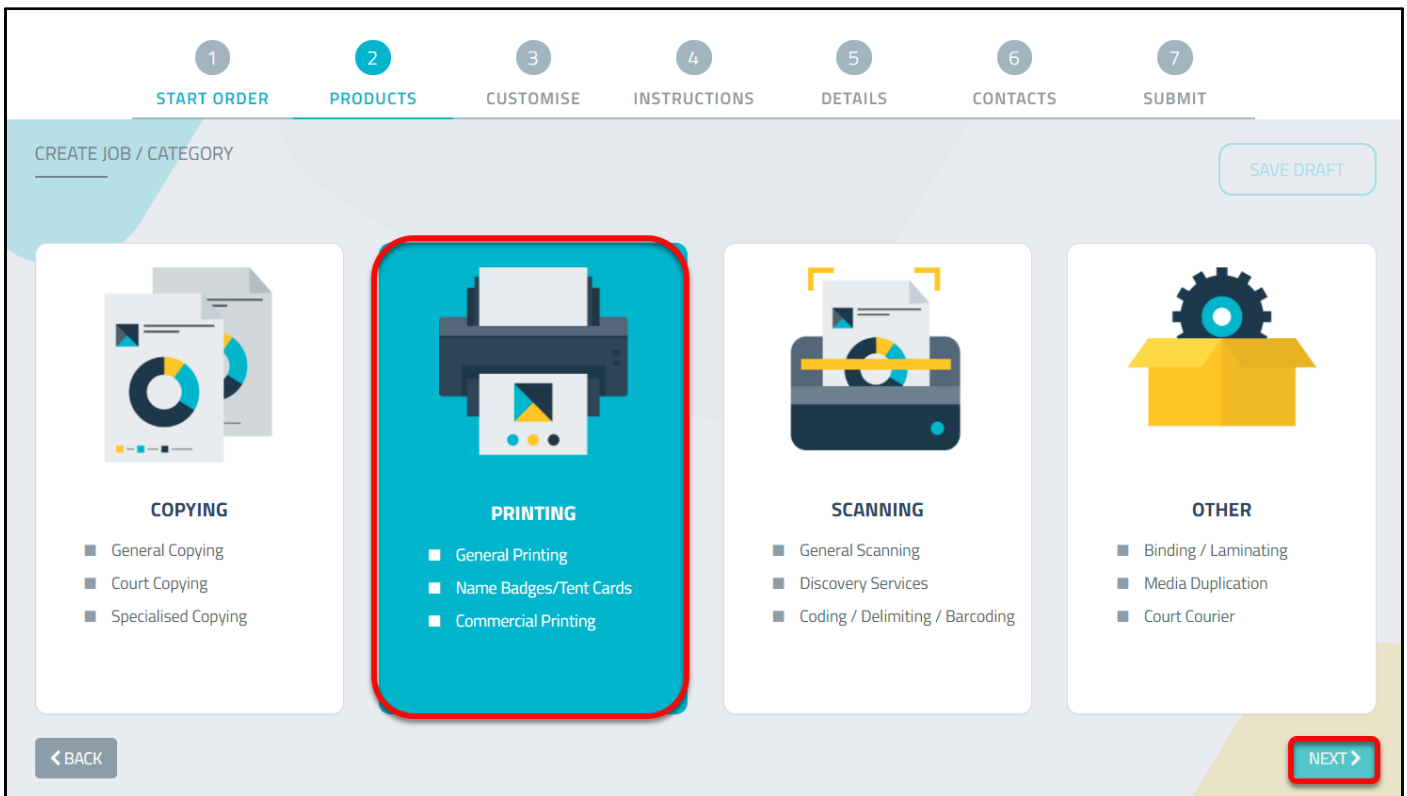
Create Job

- **Step1: CREATE JOB → New Job**
  NB: If you have permission to create jobs for different locations, there will be a drop down for you to choose which location this job is for before you click **New Job**.

- **Step 2:** Select Product → **NEXT**

- **Step 3:** Based on the Product selected, there will be different options available:
  General Printing is the default print option and is for <u>non-client</u> document printing.
  Commercial Printing should be selected for <u>client</u> document printing.
- Select the required option '+' or leave the default → **NEXT**

- **Step 4:** There are 2 ordering instruction options:
  - **GUIDED QUESTIONS** is the recommended option with questions prompting the required job details to be entered.
  - **MANUAL ENTRY** is useful for simple jobs where it's quick to type the instructions, or if you have the job instructions in text form (e.g. email) and want to copy and paste them.
- Choose an ordering option → **NEXT**

- **Step 5:** The guided questions will vary depending on the product and options selected. Enter all required details:

Colour Processing

If there is any colour amongst your originals (photographs, letterheads, text etc), should we print:

- ◉ Everything in colour, exactly as original
- ○ Only "meaningful colour" in colour
- ○ Everything in Black & White

Printing Output

Paper Size

- ○ A0
- ○ A1
- ○ A2
- ○ A3
- ◉ A4
- ○ A5

Single or Double Sided

- ○ Single Sided
- ◉ Double Sided

Specify Preferred Finishing

- ◉ Wire-Bind
- ○ Insert into TIMG supplied folders
- ○ Insert into client supplied folders
- ○ Hole punch and rubber-band/clip
- ○ Rubber band/clip only – Do not hole punch
- ○ Other - See Special Instructions

Engagement Code:

123XRRW3441-Test engagement code 1

> Start typing your Engagement Code, and the matching codes will show for you to select.

Special Instructions:

Please enter any special instructions here

‹ BACK   NEXT ›

Engagement Code is mandatory for you to enter the code the job will be charged to. Once you start typing the code a list of matching codes will appear for you to select from.

Special Instructions is optional and can be used for special instructions or additional details not already captured on this screen.

- 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** can be used if additional contacts need to be added to this job.
  After a new contact has been added, they will be in your **Add Existing Contact** for future jobs.

- Enter the new contact's details **→ Add Contact**
  NB: Please include Address for Pickup and Delivery Contacts.

- Select the responsibilities assigned to 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**
  - **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 job has been submitted, use **Job History** to access the job and view its progress.

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.

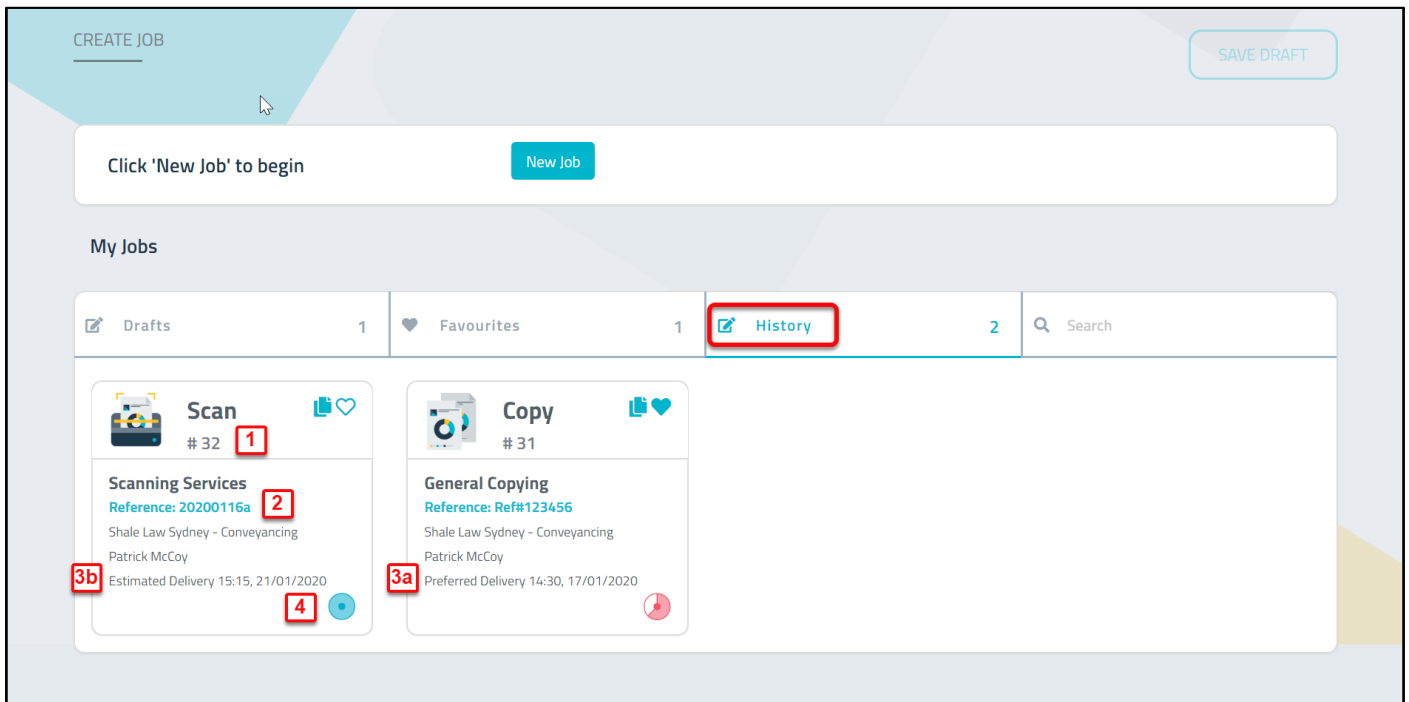- After viewing the quote click the **Approve Quote** link to accept or reject the quote.
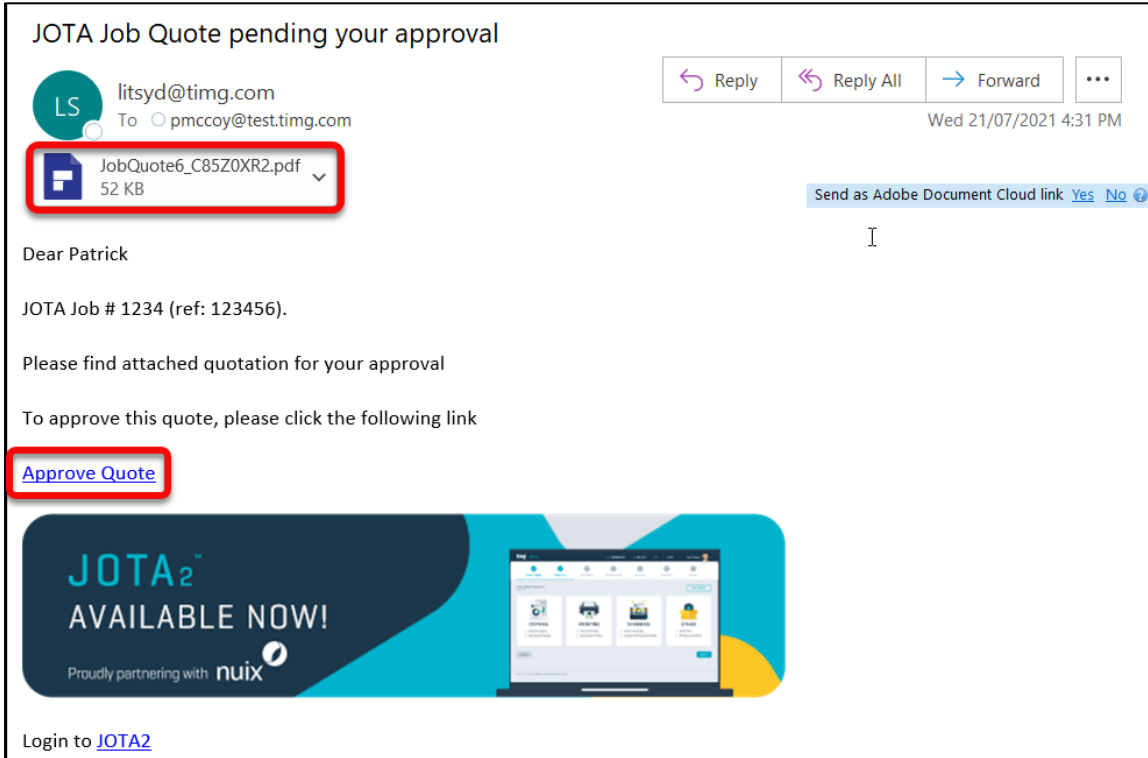
Alternatively go to your JOTA2® dashboard to accept or reject the quote.
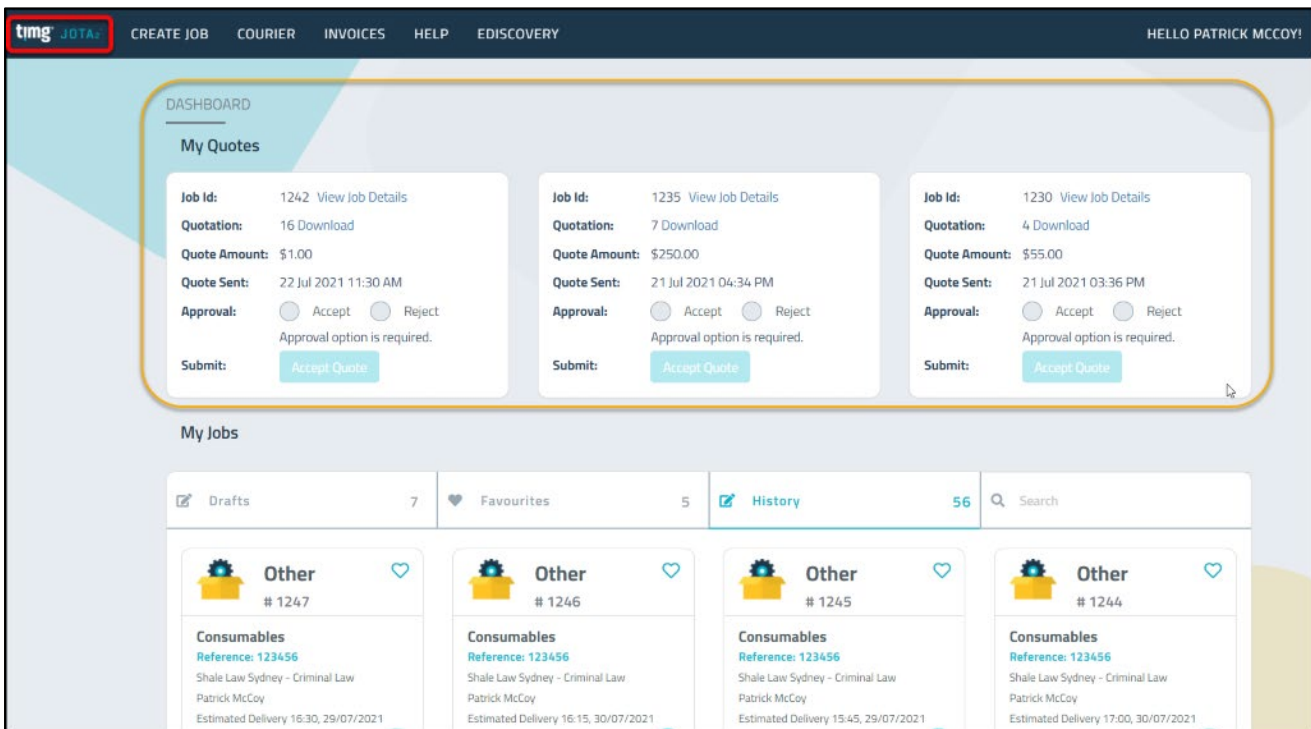
Job History

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**: Is the engagement code 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.

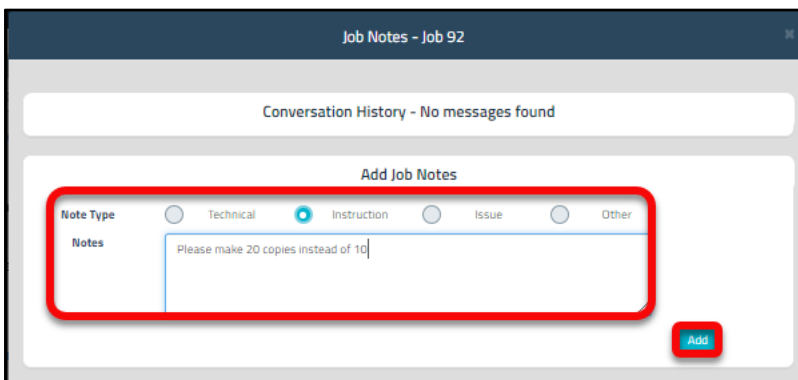Click on a job to see its full details.

Job Notes & Communication

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

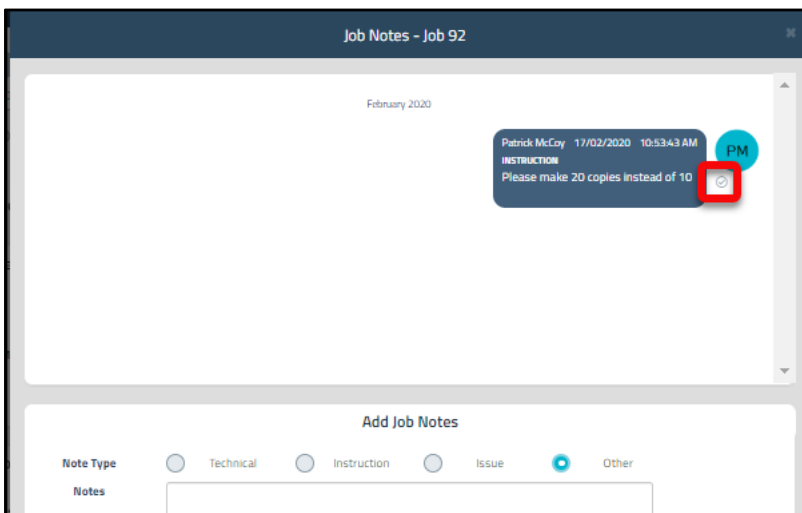- Open an existing job through **History** or **Favourites → COMMUNICATION HISTORY**
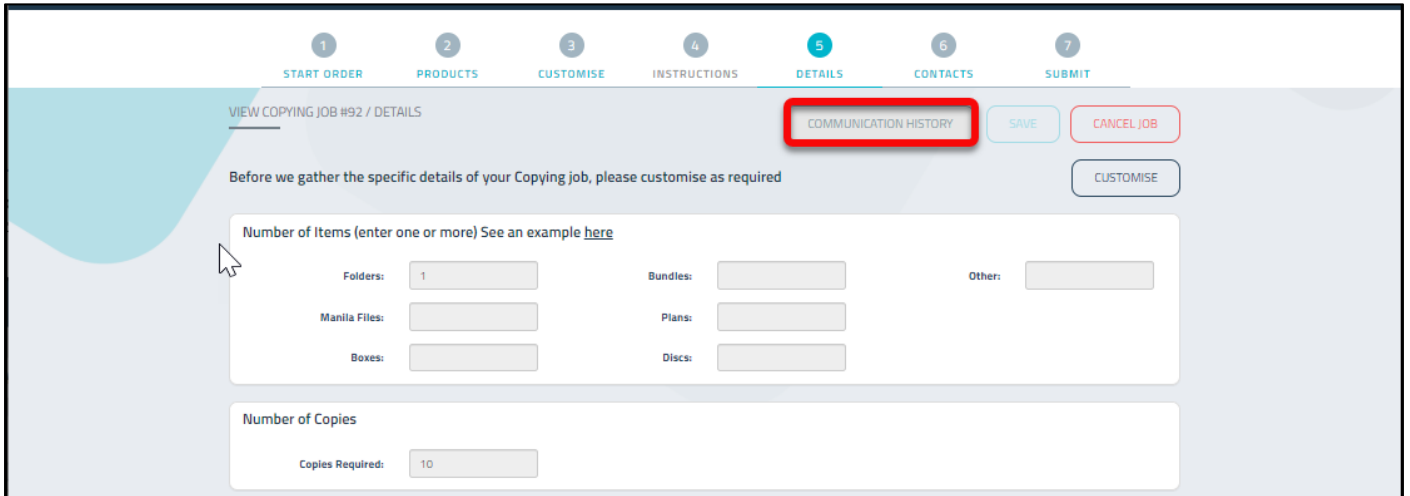
- Select **Note Type →** Enter **Notes → Add**


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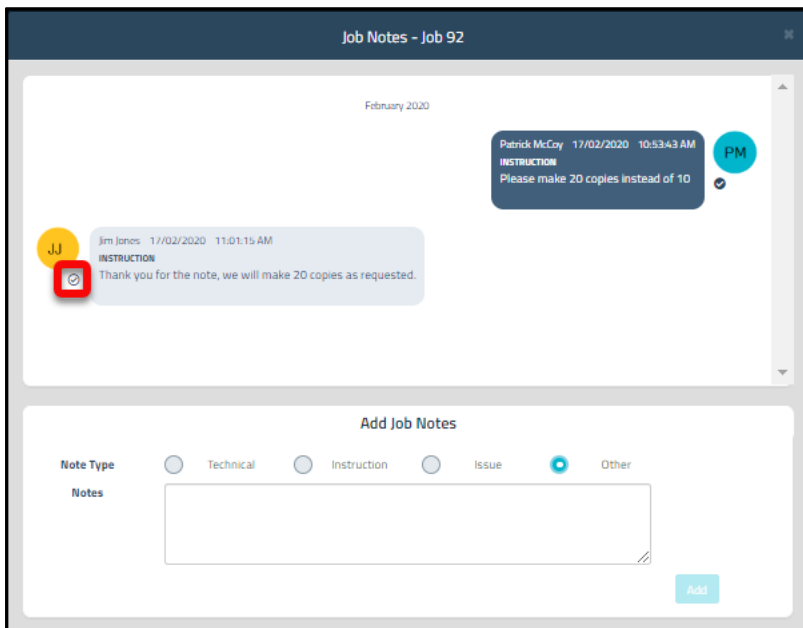
Emails will be sent to alert the nominated job stakeholders to the new Job Note as follows:

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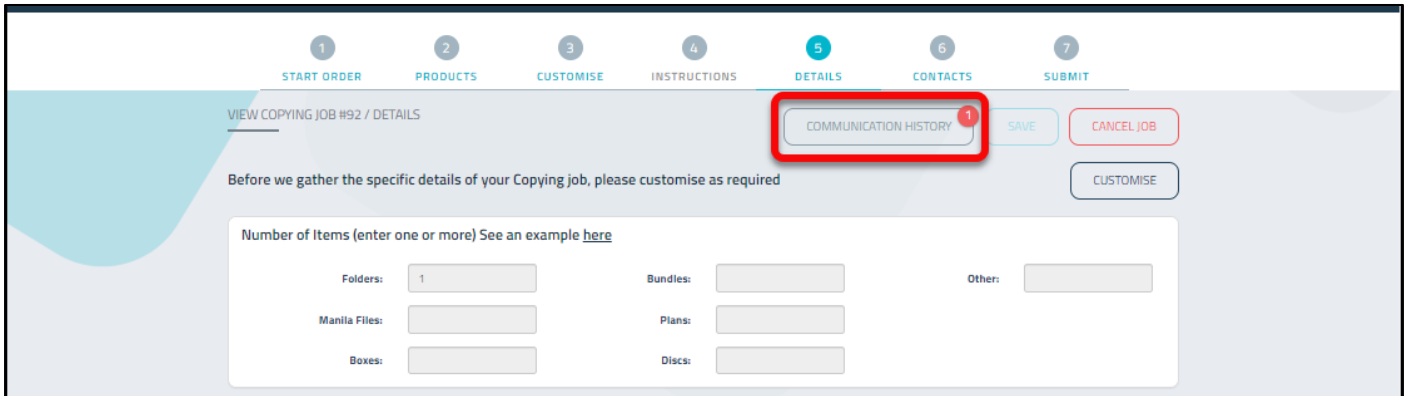
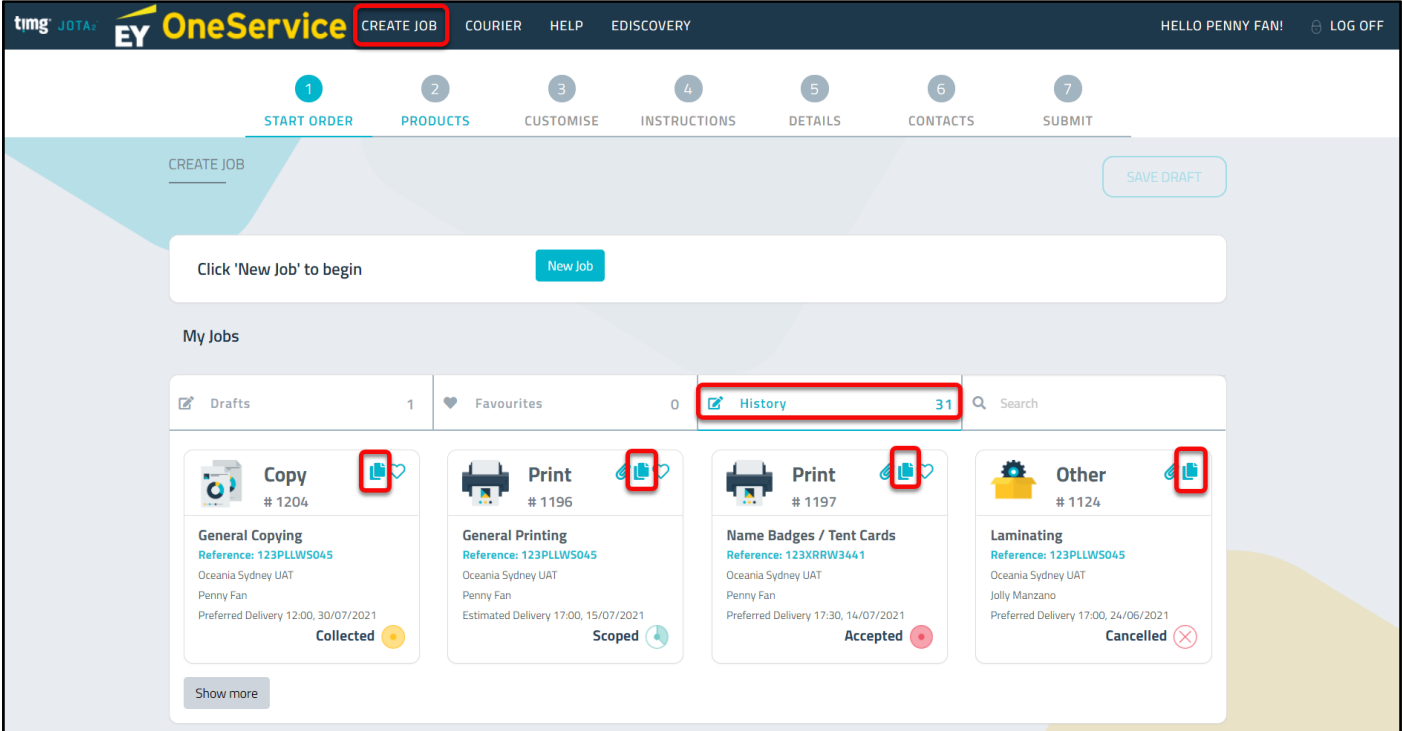- Click the Job Note to acknowledge you have read it.

Duplicate Job

The duplicate icon is a quick way to create a new job using details 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 Guided 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.
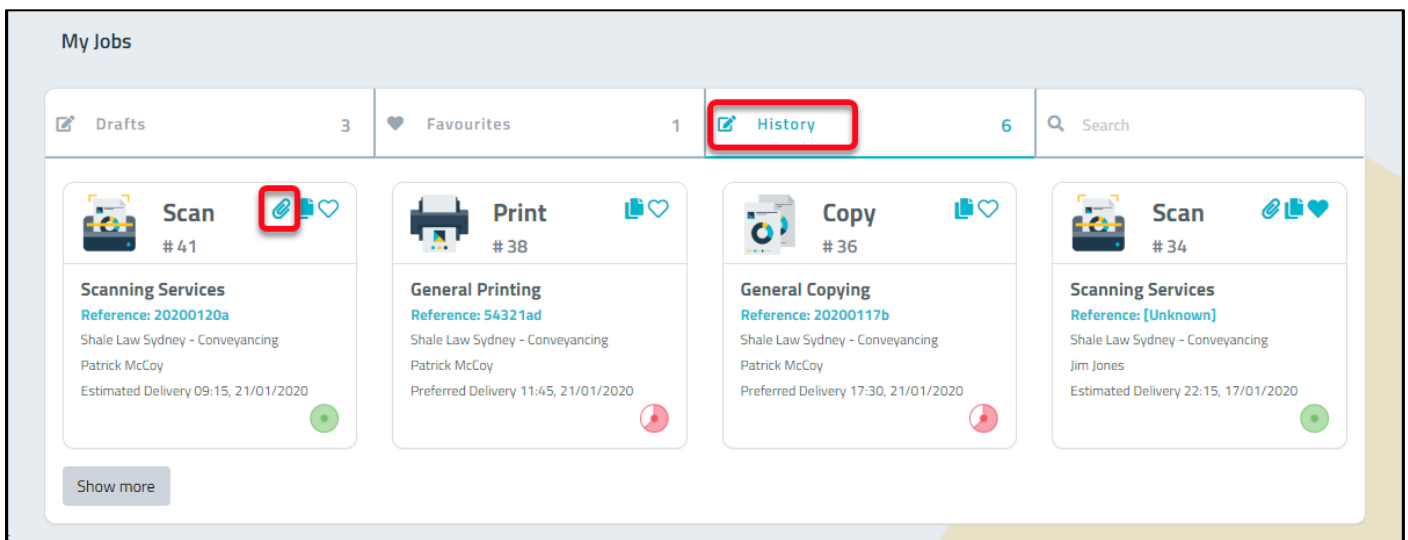
You may have multiple folders and files to access.

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.
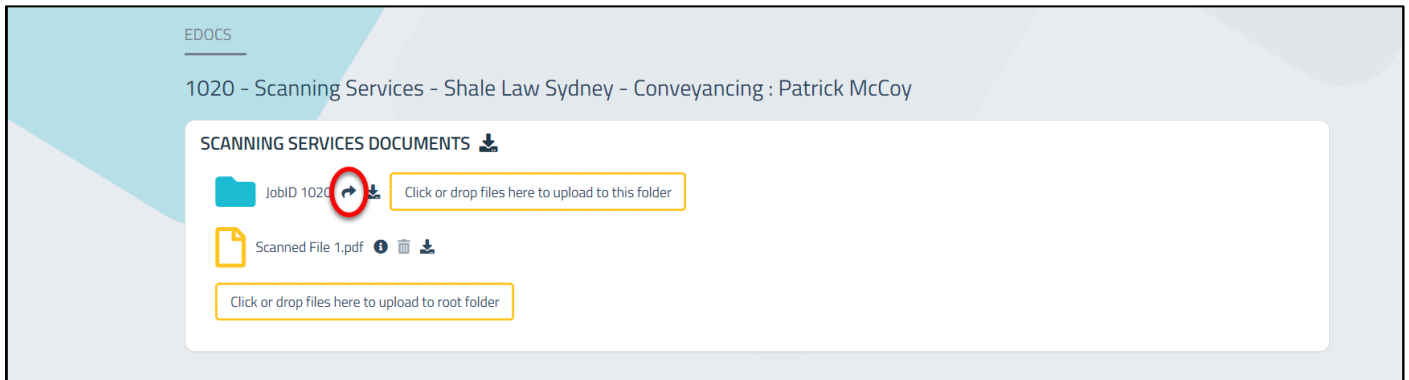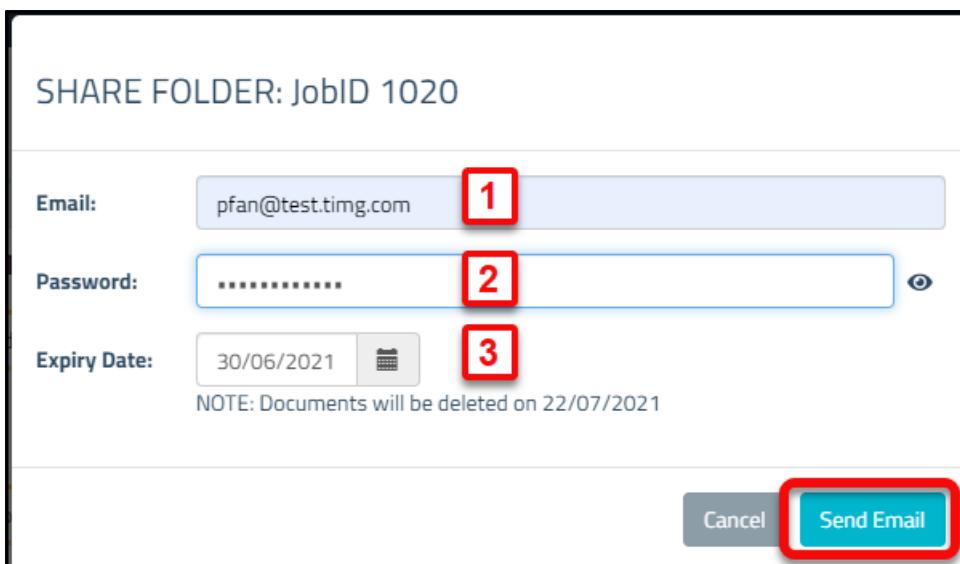 2. **Password** – create a password which the recipient must use to access the eDoc share folder. The password must be **minimum 8 characters, at least one uppercase letter, one lowercase letter, one number and one special character**.
     Click the eye icon to show or hide the password.
     NB: The password isn't emailed to the person receiving the eDoc share folder email, for security reasons you must provide it separately.
  3. **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**.
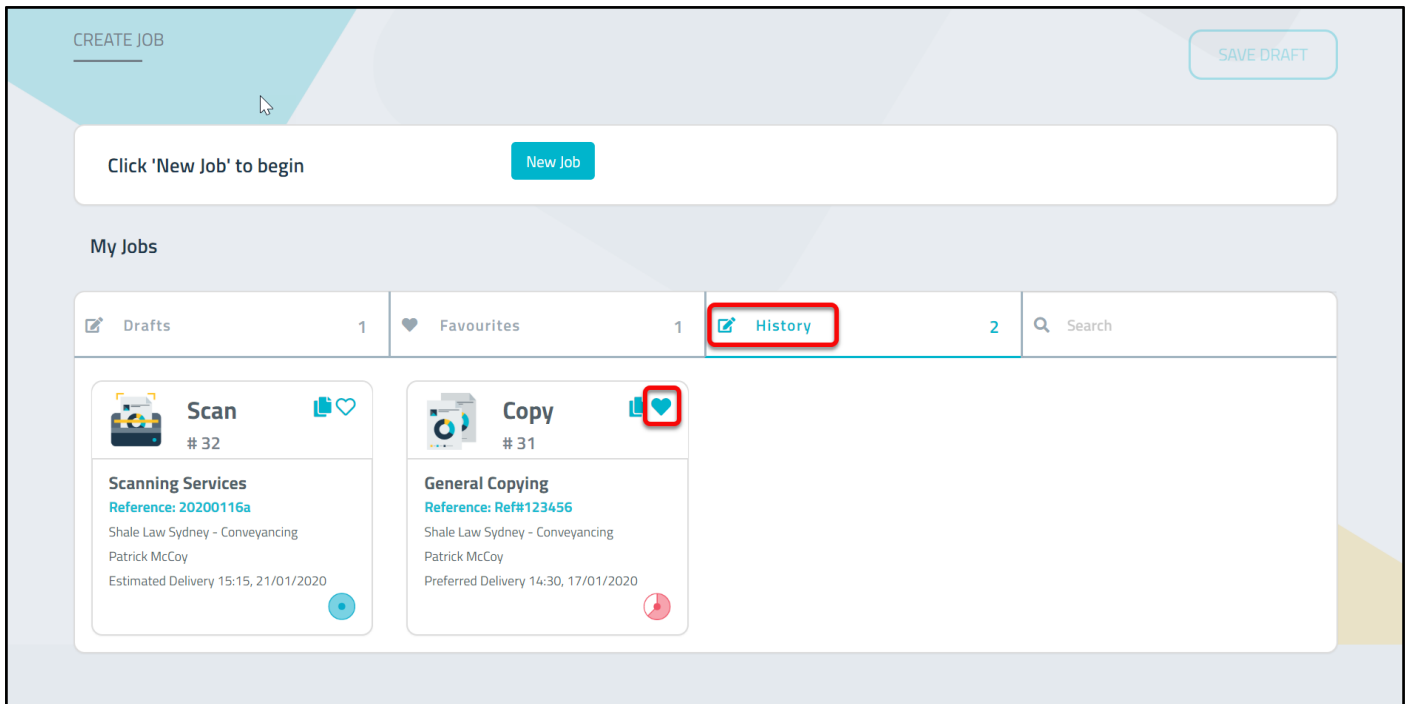
Click **Favourites** to see your favourite jobs.
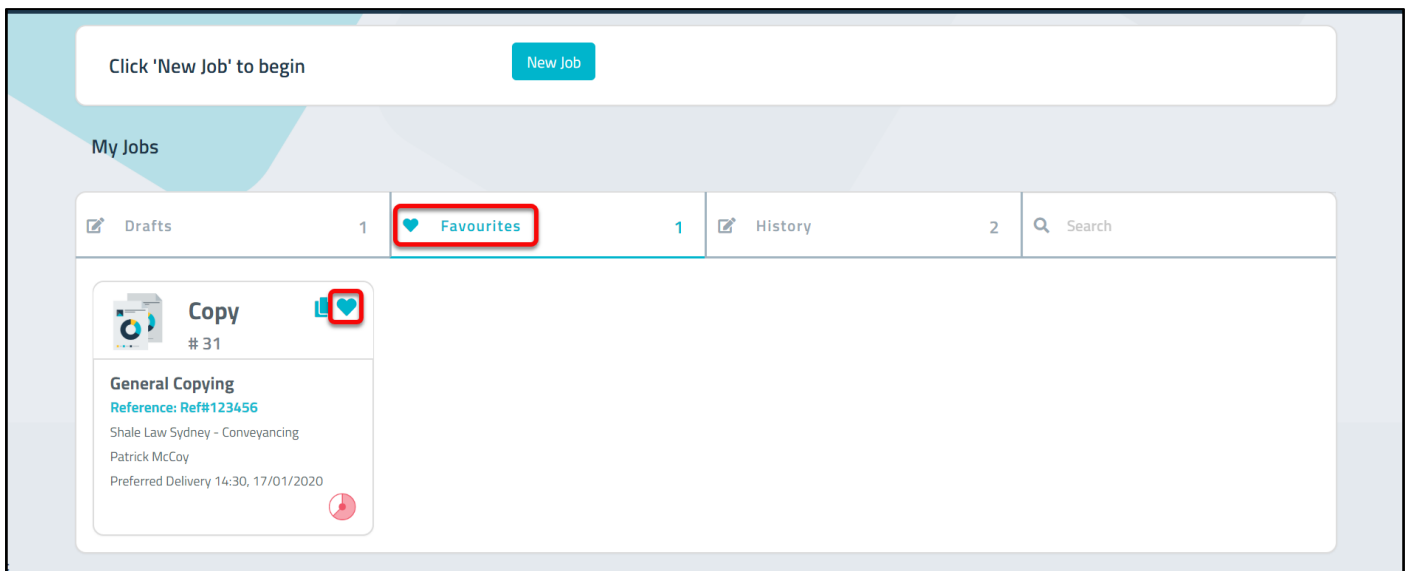
To remove jobs from your favourites, unselect the heart icon. 🤍

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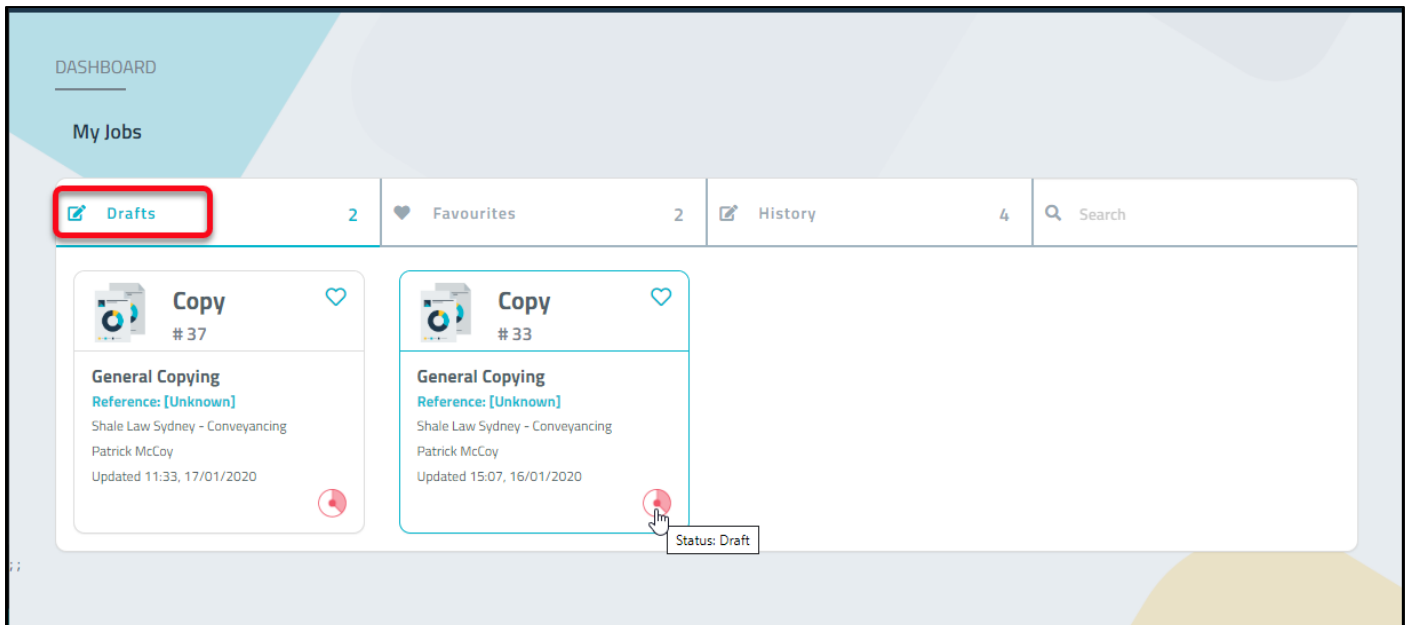
The **Delete Draft** button is available in each job if the draft job is no longer needed.
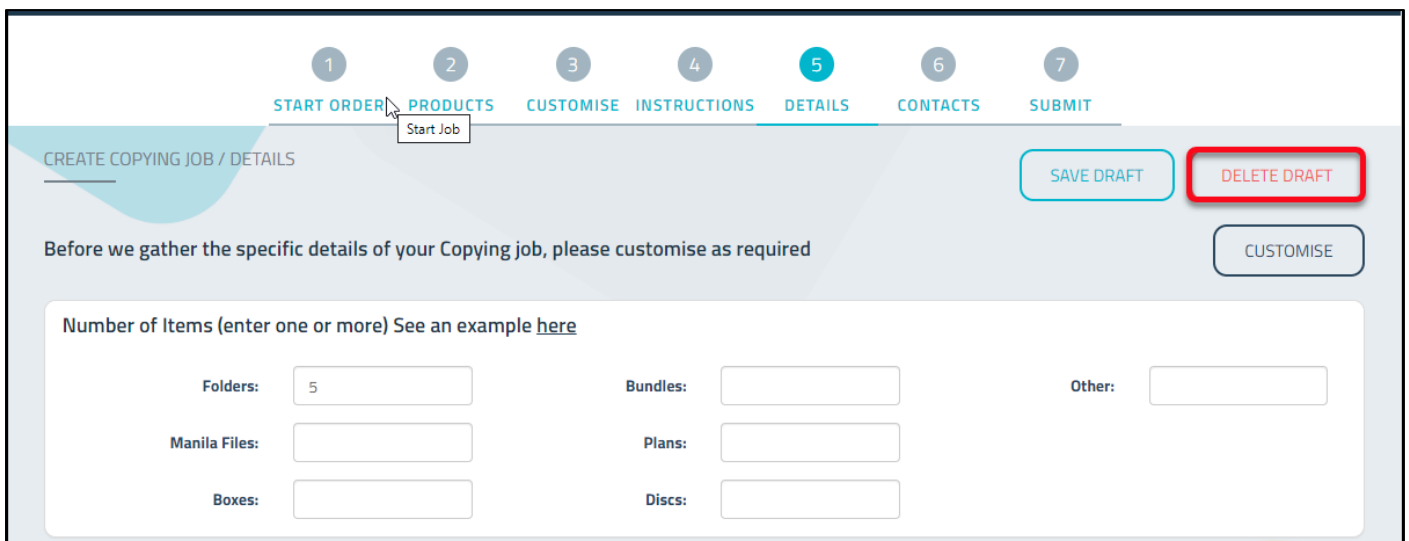
Buddy Users

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.
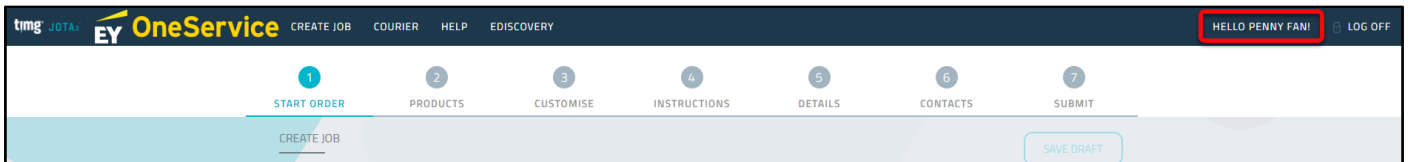
- Click **Manage Buddies.**
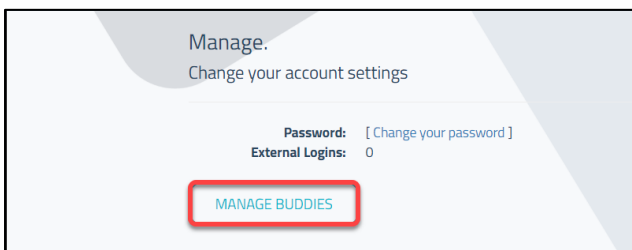
- Click **ADD BUDDY** → select your buddy → **SAVE**
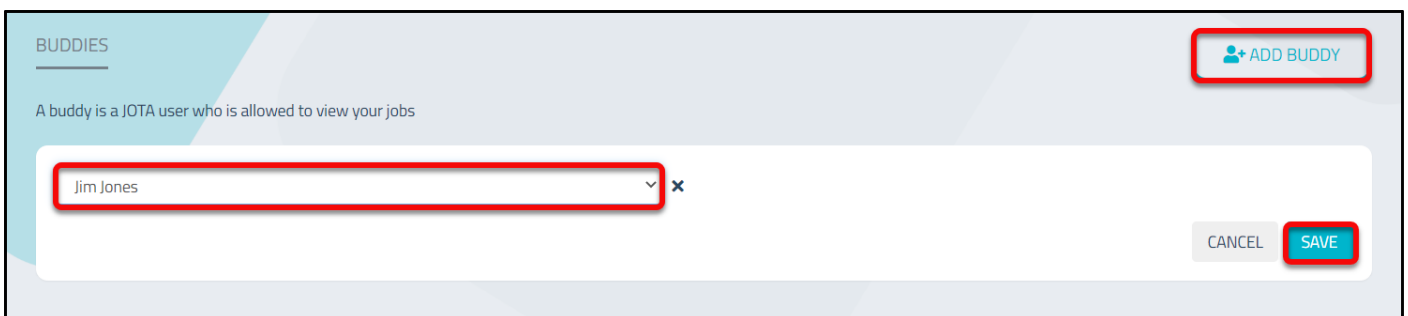
Your buddy can now access your jobs, including completing draft job details and submitting them.
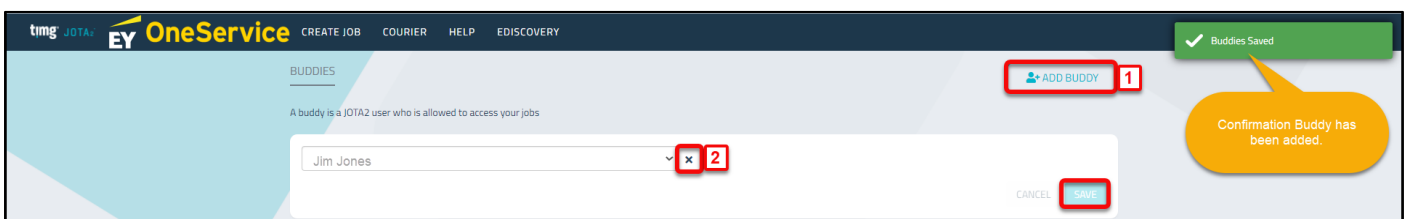
After adding a buddy, you can:

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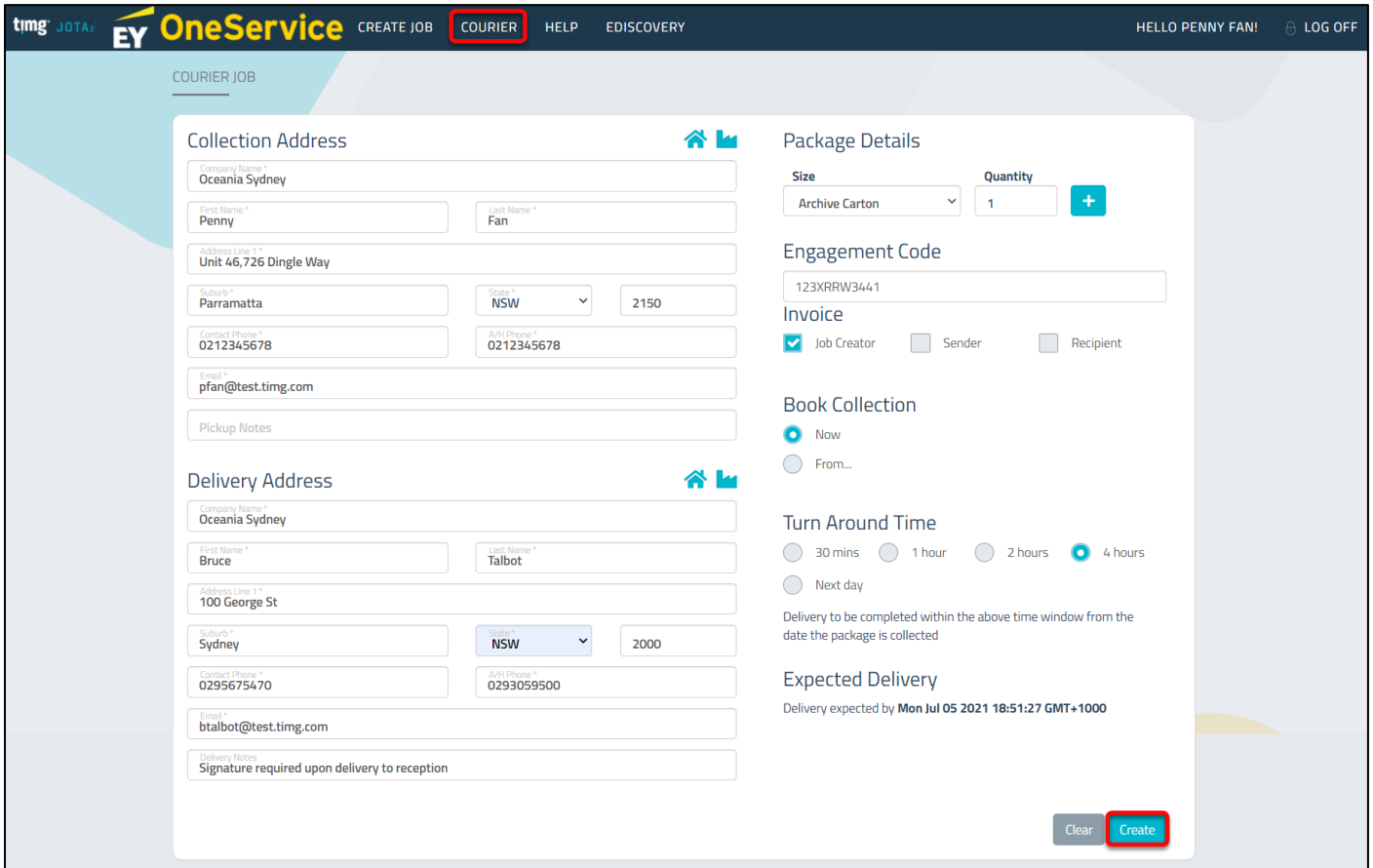
Courier

Courier jobs can be booked for items to be picked up from one location and delivered to another.
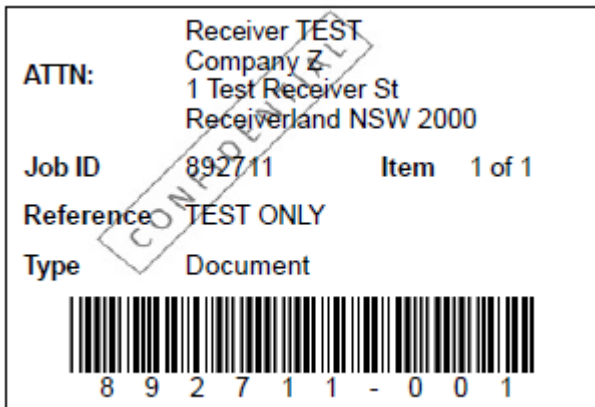
- Select **COURIER** → enter courier job details → **CREATE**.

  🏠 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.

Bulk Courier Jobs

If you have multiple courier jobs, you can complete the Bulk Courier template with all the courier job details and email it to your local Bureau. The template can be found on your JOTA2 Dashboard, scroll down to the bottom of the screen.

TIMG staff will assist with logging the courier jobs into JOTA2 on your behalf.

Your local Bureau's contact details can be found on the JOTA2 help page - https://www.timg.com/jota-2/

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 non-client document or email to be printed.

Commercial Document Printing - Select this option if you have client documents or 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.