# JOTA2® Client How to Guide

Need help? Contact your Local Bureau: 1300 548 787



timg®

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### **Accessing JOTA2®**

Go to the EY intranet -> Admin & benefits -> Oceania JOTA

Budene a briter Budene a briter Budene a briter	۲
Admin 🗸 Benefits 🗸 Find colleagues My Independence	
Admin & benefits	
Admin & benefits – apps & tools	
<ul> <li>Checkpoint Australia: CheckPoint Australia Signon (thomsonreuters.com)</li> <li> <b>Greania</b> - Asia-Pacific      </li> <li> <b>Checkpoint</b> Australia: CheckPoint Australia Signon (thomsonreuters.com)         </li> <li> <b>Greania</b> - Book my Trip         </li> <li> <b>Oceania</b> BSC Connect Tool         </li> <li> <b>Oceania</b> Core HR         </li> <li> <b>Oceania</b> Core HR         </li> <li> <b>Oceania</b> EX Connect Tool         </li> <li> <b>Oceania</b> Core HR         </li> <li> <b>Oceania</b> Exployee Self Service (ESS)         </li> <li> <b>Oceania</b> Enterprise Support Services         </li> <li> <b>Oceania</b> EY Shop AU/NZ         </li> <li> <b>Oceania</b> EY Workplace         </li> <li> <b>Oceania</b> Independence         </li> <li> <b>Oceania</b> JOTA         </li> <li> <b>Oceania</b> Contacts         </li> <li> <b>Oceania</b> Our EY - myAPPLAUSE, myPERKS, myWELLBEING         </li> <li> <b>Oceania</b> SCORE         </li> <li> <b>Oceania</b> Raise a Travel Approval Request         </li> </ul>	
Onboarding in Oceania     People Insights [OCEANIA]     Reserve Oceania     SuccessFactors	
Wellbeing during COVID-19	

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<sup>®</sup> account, please follow these steps:

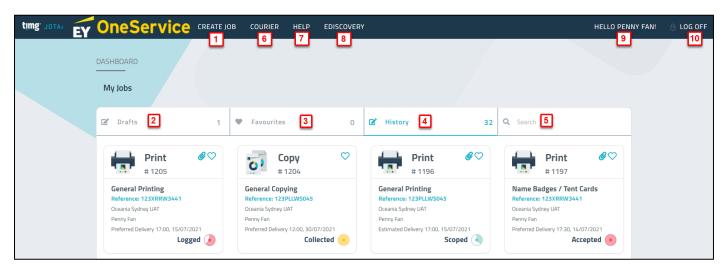
- Contact your organisation's IT team, provide them with a screenshot of the error and request they check you are listed as an active employee on the JOTA2<sup>®</sup> user file supplied to TIMG. If you were missing on the file, once you are added and the file is imported to JOTA2<sup>®</sup> you will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



### Dashboard

Once logged into JOTA2<sup>®</sup> 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<sup>®</sup> webpage with training resources to help you use JOTA2<sup>®</sup>.
- 8. **EDISCOVERY:** menu item to access TIMG's eDiscovery webpage to learn more about these services.
- 9. Account Settings: to access your JOTA2<sup>®</sup> 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.



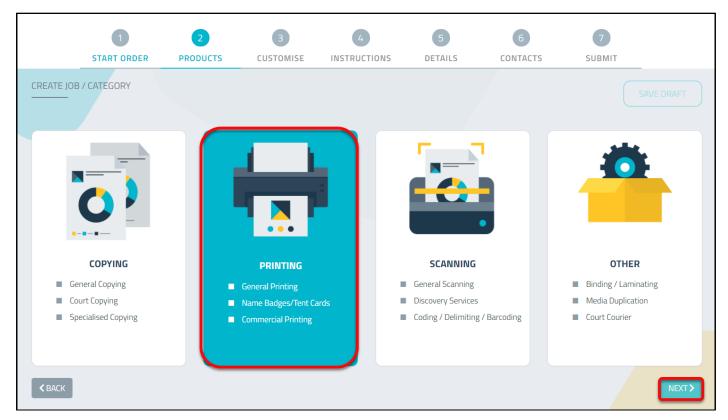
#### **Create Job**

#### • 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**.

timg' JOTA?'	OneService	CREATE JOB COURIE	R HELP	EDISCOVERY				HELLO PENNY FAN!	🔒 LOG OFF
	1 START ORDER	2 PRODUCTS	3 CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT		
	CREATE JOB								
	Click 'New Job' to begi	n	New Job	)					
	My Jobs								
	🖻 Drafts	1 🎔 Favou	ites	0 🗹 H	listory	<b>31 Q</b> Se	arch		
	<b>Copy</b> # 1204	••	<b>Print</b> # 1196	Ø	<b>Print</b> # 1197	@ • • • • • • • • • • • • • • • • • • •	• Other # 1124	Ø 🕒	
	General Copying Reference: 123PLLWS045 Oceania Sydney UAT Penny Fan Preferred Delivery 12:00, 30/07/ Collect	Oceania Sy Penny Fan 2021 Estimated I	123PLLWS045 Iney UAT Delivery 17:00, 15	/07/2021 icoped	be us	luplicate b sed to crea om an exis	ate a ne	w	
	Show more								

• Step 2: Select Product → NEXT



## timg

- 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

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE		ONS	5 DETAILS	6 CONTACTS	7 SUBMIT	
	NTING JOB / OPTIONS							(	SAVE DRAFT
		AVAILABLE					SELECTED		
	adges / Tent Cards rcial Printing			+	Gener	al Printing			
< BACK									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

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE	5 DETAILS	6 CONTACTS	7 SUBMIT
	INTING JOB / INSTRU Dose an ordering of					SAVE DRAFT
		GUIDED QUESTION Recommended o Easy questions th processing and fa	<b>ption</b> of ordering nat allows quick			y what you want? Then option and you can type
< BACK						NEXT>



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

1 START ORDER F	2 PRODUCTS	3 CUSTOMISE		5 DETAILS	6 CONTACTS	7 SUBMIT
STARTORDER	RODUCIS	COSTOMISE		DETAILS	CONTACTS	
CREATE PRINTING JOB / DETAILS				EDC	DC FILES SAVE	DRAFT DELETE DRAFT
Before we gather the specific deta	ails of your Printi	ng job, please	e customise as requi	040	tomise to quid ange job optio	
File Instructions						
How would you like to supply the files?						
Upload Documents:		d via TIMG's eDoc			Upload pr	rint files
Documents uploade		r drop files here to How to Guide V3.	pupload .pdf Remove Download		iple files can l each one a m	be uploaded with ax 2000MB.
Job Size Instructions				Tip:	Zip files to m and uploa	ake files smaller d faster.
Estimate the size:						
	Approxir	mate number of p	ages			
	50					
	Approxir     Unknow	mate total data si:	ze (MB)			
	UIRIOW					
Number of copies:						
Copies require	:d: 30					
Print all documents	s?: 💽 Yes					
	No - Ple	ase specify which	document should or shou	ld not be printed		
Printing Instructions						
Printing sequence:						
	-	ogical <mark>(</mark> earliest dat	te first)			
	Docume					
	As per Ir					
	Uther - I	Please specify				
How would you like your printed docume		ach document				
			veen each document			
	~		and Attachment as one do	ocument		
	_		red page between Host ar		bing	
	Other - I	Please specify				
	no collat	ion required				
What would you like to do with any unpr	intable documents?					
		Provide a separat	te report of unprintable do	cuments		
	🔵 Insert a	placeholder in prii	ntout			
	Other - I	Please specify				
What do you wish to do with any Excel s	preadsheets?					
		aceholder				
	~		) pages, otherwise print pla	aceholder		
			t regardless of size			
	UN/A - an	iy Excel document	ts found will be omitted			



Colour Processing	
If there is any colour amongst your original	is (photographs, letterheads, text etc), should we print:
O Everything in colour, exactly as original	I
Only "meaningful colour" in colour	
Everything in Black & White	
Printing Output	
Paper Size	
AO	A3
A1	O A4
() A2	○ A5
Single or Double Sided	
Single Sided	
Ouble Sided	
Specify Preferred Finishing	
O Wire-Bind	Hole punch and rubber-band/clip
Insert into TIMG supplied folders	Rubber band/clip only – Do not hole punch
Insert into client supplied folders	Other - See Special Constructions
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.

	1 START ORDER	2 PRODUCTS	3 CUSTOMISE	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT	
CREATE PRIN	TING JOB / CONTAC	TS			EDO	FILES SAVE	DRAFT	E DRAFT
Ð	ADD EXIST	ING CONTACT	¢	ADD NEW CON	ТАСТ			
Job Conta	cts							
Job Crea Penny Far	-	- 🗹						
Responsit	ilities for Proces	sing and Communi	cations		Drag and	l drop contact from c	bove to relevant resp	onsibility
Logged By	Pic	:kup	Technical Question	is Status U	odates	Delivery	Invoice	
Penny Fa	n	Penny Fan 🗙	Penny Fan	×	y Fan 🗙	Penny Fan	Penny Fan	×
< ВАСК								NEXT >

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

	Add	Job Contact	
First Name	Bruce	Address 1	100 George St
Last Name	Talbot	Address 2	
Position TItle	Lawyer	City/Suburb	Sydney
Business Hours Telephone	0212345678	State	NSW
After Hours Telephone	0212345678	Post Code	2000
Company Name	Oceania Sydney UAT	Country	Australia
		Email	btalbot@test.timg.com
			Add Contact Cancel



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

Job Contacts						
Job Creator		Lawyer	⊘ Technical Questions			
Responsibilities for	or Processing and Com	municat	O Status Updates	Drag	and drop contact from abo	ove to relevant responsibility
Logged By	Pickup		O Invoice	Status Updates	Delivery	Invoice
Penny Fan	Penny Fan	×	Penny Fan 🗙	Penny Fan 🗙	Bruce Talbot	Penny Fan 🗙
			Bruce Talbot X			
< BACK						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.

1 START ORDER PRO			CUST	3 TOMIS	E	IN	STRU	5     6     7       CTIONS     DETAILS     CONTACTS     SUBMIT
REATE PRINTING JOB / SUBMIT								SAVE DRAFT
Quotation	ement of	this ic	b?			, Yee		
	<			ıly 202	21	Yes	No >	
Job Timing	Мо	Tu	We	Th	Fr	Sa	Su	
5	28	29	30	1	2	3	4	
TIMG offers an on-demand service. We strive		6	7	8	9	10	11	ng us an indication of how flexible your delivery timeframe is, you allow us to provide you the
best possible price while still meeting your ne	12	13	14	15	16	17	18	
While we promise to make every effort to me	et y 19	20	21	22	23	24	25	know whether your turnaround time frame is:
Delivery Timing:	26	27	28	29	30	31	1	
Limited Flexibility	2	3	4	5	6	7	8	
Urgent				G				
Preferred Delivery Time	30/0	)7/202	21 10:4	5 AM				1
< BACK								СКЕАТЕ ЈОВ

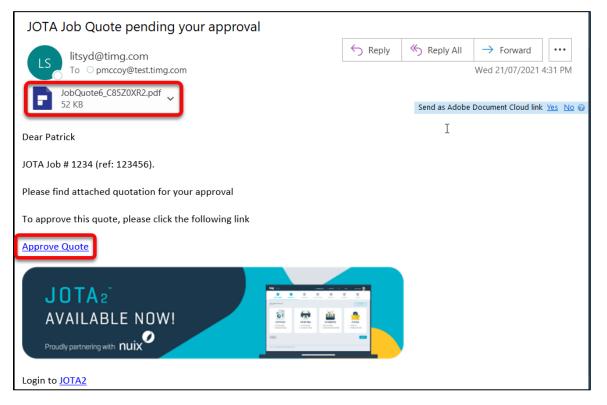
Your job has been submitted, use **Job History** to access the job and view its progress.



#### 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.

(	DASHBOARD My Quotes		
	Job Id:     1242 View Job Details       Quotation:     16 Download       Quote Amount:     \$1.00       Quote Sent:     22 Jul 2021 11:30 AM       Approval:     Accept     Reject       Approval option is required.     Submit:     Accept Quote	Job Id:     1235 View Job Details       Quotation:     7 Download       Quote Amount:     \$250.00       Quote Sent:     21 Jul 2021 04:34 PM       Approval:     Accept     Reject       Approval option is required.     Submit:	Job Id: 1230 View Job Details Quotation: 4 Download Quote Amount: \$55.00 Quote Sent: 21 Jul 2021 03:36 PM Approval: Accept Reject Approval option is required. Submit: Accept Quote
	My Jobs	rites 5 🗹 History	56 Q Search
	Consumables Reference: 123456	Other         Consumables           # 12456         Consumables           # 123456         Reference: 123456	Image: System of the system    Image: System of the system    Shale Law Sydney - Criminal Law



### **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	<b>Q</b> Search		
Scan <b>₽</b> ♡ #32 1	Copy #31					
Scanning Services Reference: 20200116a 2	General Copying Reference: Ref#123456					
Shale Law Sydney - Conveyancing Patrick McCoy <b>3b</b> Estimated Delivery 15:15, 21/01/2020 <b>4</b>	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**: 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** 

	1 START ORDER	2 PRODUCTS	4 INSTRUCTIONS	5 DETAILS	6 CONTACTS	7 SUBMIT
VIEV	V COPYING JOB #92 / DET	AILS		COMMUNICAT		SAVE CANCEL JOB
	ore we gather the spec umber of Items (enter		 customise as requ	ired		CUSTOMISE
4	Folders:	1	Bundles:		Other:	
	Manila Files: Boxes:		Plans:			
N	umber 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	ж
	February 2020 Patrick McCoy 17/02/2020 10:5343 AM INSTRUCTION Please make 20 copies instead of 10	*
		Ŧ
	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	3 CUSTOMISE		5 DETAILS	6 CONTACTS	7 SUBMIT
VIEW COPYING JOB #92 / DET Before we gather the spec		<sup>r</sup> Copying job, pleas	e customise as requ		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	н
	February 2020	*
	Patrick McCoy 17/02/2020 10:5343 AM INSTRUCTION Please make 20 copies instead of 10	
JJ	1//02/2020 11.01.15 AM w u 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 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.

timg' JOTA?	OneService CREATE	OB COURIER HE	ELP EDISCOVERY		HELI	LO PENNY FAN!	🔒 LOG OFF
	1 START ORDER PR	2 ODUCTS CUSTO		5 6 DETAILS CONTA			
	CREATE JOB						
	Click 'New Job' to begin	Net	w Job				
	My Jobs						
	🕑 Drafts 1	Favourites	0	History 31	<b>Q</b> Search		
	<b>Copy</b> # 1204	<b>Prin</b> # 119		<b>Print</b>	* <b>Other</b>		
	General Copying Reference: 123PLLWS045 Oceania Sydney UAT Penny Fan Preferred Delivery 12:00, 30/07/2021 Collected	General Printing Reference: 123PLLV Oceania Sydney UAT Penny Fan Estimated Delivery 17	NS045 R O( Pe	lame Badges / Tent Cards eference: 123XRRW3441 ceania Sydney UAT enny Fan referred Delivery 17:30, 14/07/2021 Accepted	Laminating Reference: 123PLLWS045 Oceania Sydney UAT Jolly Manzano Prefered Delivery 17:00, 24/06/2021 Cancelled		
	Show more						

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



### eDOC Files

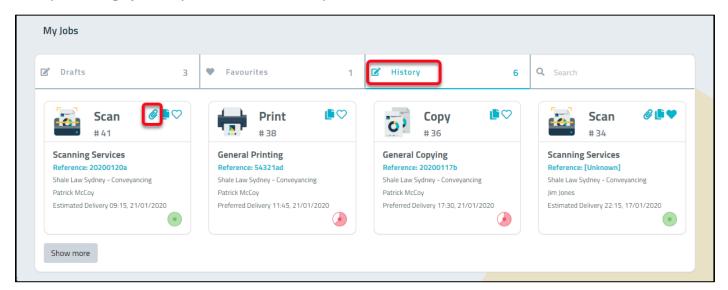
eDOC files is the JOTA2® repository for electronic files and can be accessed by a job's Paperclip icon.

**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<sup>®</sup>. 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.

-	19005 148 - Scanning Services - Shale Law Sydney - Conveyancing : Pa	rick McCoy
Click the folder name to open the folder and view its contents.	SCANNING SERVICES DOCUMENTS LitiD448_031120 LitiD448_031120.1 Canned File 3.pdf Scanned File 9.pdf Scanned File 7.pdf Scanned File 7.pdf Scann	Download files quickly using the following options: 1a - All job folders and files into a zip folder 1b - A folder with all of its contents 1c - A subfolder with all of its contents 1d - Individual file(s) lete files you uploaded, before the job is scoped OR after the job is completed.
	Scanned File 8 pdf       ■         Scanned File 6.pdf       ■         Scanned File 6.pdf       ■         Scanned File 4.pdf       ■         Scanned File 4.pdf       ■         Scanned File 10.pdf       ■         Scanned File 2.pdf       ■         Scanned File 2.pdf       ■	



### 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

-	020 - Scanning Services - Shale Law Sydney - Conveyancing : Patrick McCoy	
	SCANNING SERVICES DOCUMENTS 🛓	
	Scanned File 1.pdf 💿 🛅 🛓	
	Click or drop files here to upload to root folder	

- Enter share folder details:
  - 1. **Email** email address of the eDoc share folder recipient to be emailed the eDoc share link.
  - 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

SHARE FOLDER: JobID 1020				
Email:	pfan@test.timg.com			
Password:	2	0		
Expiry Date:	30/06/2021 a 3 NOTE: Documents will be deleted on 22/07/2021			
		Cancel 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.

SHARE FOLDER: JobID 1020		
<b>Email</b> pfan@test.timg.com	<b>Expiry</b> 30/06/2021	Action
	3 Car	Add New

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.

SHARE F	SHARE FOLDER: JobID 1020				
Email:	pfan@test.timg.com				
Password:	•				
Expiry Date:	30/06/2021				
Created:	Wednesday, 23 June 2021 11:12 AM				
Link:	https://jota2uat.timg.com/app/eDocs/folderShareDownload/b52e4287-b935- 4d98-9cd0-9a6878e65af5				
2					
Resend Email   1     Cancel   Update					



### **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	<b>Q</b> Search	
Scan 🕫 🕫	Сору 💵			
# 32 Scanning Services	# 31 General Copying			
Reference: 20200116a Shale Law Sydney - Conveyancing	Reference: Ref#123456 Shale Law Sydney - Conveyancing			
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	<b>Q</b> Search	
Copy # 31 General Copying Reference: Ref#123456							
Shale Law Sydney - Conveyancing Patrick McCoy Preferred Delivery 14:30, 17/01/2020							

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	<b>Copy</b> # 33	$\heartsuit$			
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				
#		Stati	us; Draft		

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

	1	2	З	4	5	6	7	
CREATE COPYING JOB / DETAIL	L	Start Job	CUSTOMISE	INSTRUCTION	5 DETAILS	CONTACTS	SAVE DRAFT	DELETE DRAFT
Before we gather the specif	fic details of y	our Copying	job, please ci	ustomise as re	equired			CUSTOMISE
Number of Items (enter o	ne or more) S	iee an examp	le <u>here</u>					
Folders:	5		I	Bundles:			Other:	
Manila Files:				Plans:				
Boxes:				Discs:				



### **Buddy Users**

A buddy is a JOTA2<sup>®</sup> 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.

Manage. Change your account s	ettings	
Password: External Logins:	[ Change your password ] O	
MANAGE BUDDIES		

• Click ADD BUDDY → select your buddy → SAVE

BUDDIES A buddy is a JOTA user who is allowed to view your jobs	ADD BUDDY
Jim Jones V	CANCEL

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

	CREATE JOB COURIER HELP EDISCOVERY		✓ Buddies Saved
BUDDIES A buddy is a JOTA2 user who is allowed to access your jobs		ADD BUDDY 1	Confirmation Buddy has
	Jim Jones v 2	CANCEL	been added.

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.

timg' JOTA: EY	OneService CREATE JOB	COURIER HELP EDISCOVERY	HELLO PENNY FAN! 🖯 LOG OFF
	Collection Address Corpory Name Oceania Sydney Penny Address Line 1* Unit 46,726 Dingle Way Suburb * Parramatta Corport States Oz12345678 Profit pfan@test.timg.com Pickup Notes Delivery Address Corpory Name Oceania Sydney Prost Name * Bruce Address Line 1* 100 George St Sydney Corport Name * Bruce Sydney Corport Name * Sydney Corport Name * Corport Name * Corport Name * Sydney Corport Name * Corport Name *	Let Norms* Fan Stross O212345678 Let Norms* Talbot Stross Stross O2000 AAP Dross O2000 C293059500	Package Details   sze   vantity   rkrive Carton   1   •   Dagement Code   1   1   •   1   •    • </th
			Clear

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.

ATTN:	Receiver TEST Company Z 1 Test Receiver St Receiverland NSW 2000	
Job ID	892711 Item 1 of 1	
Reference	TEST ONLY	
Туре 💛	Document	
8 9	2 7 1 1 - 0 0 1	



## **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<sup>®</sup> 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 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.

