

JOTA2®

Client How to Guide

Need help?

Contact your Local Bureau: 1300 548 787

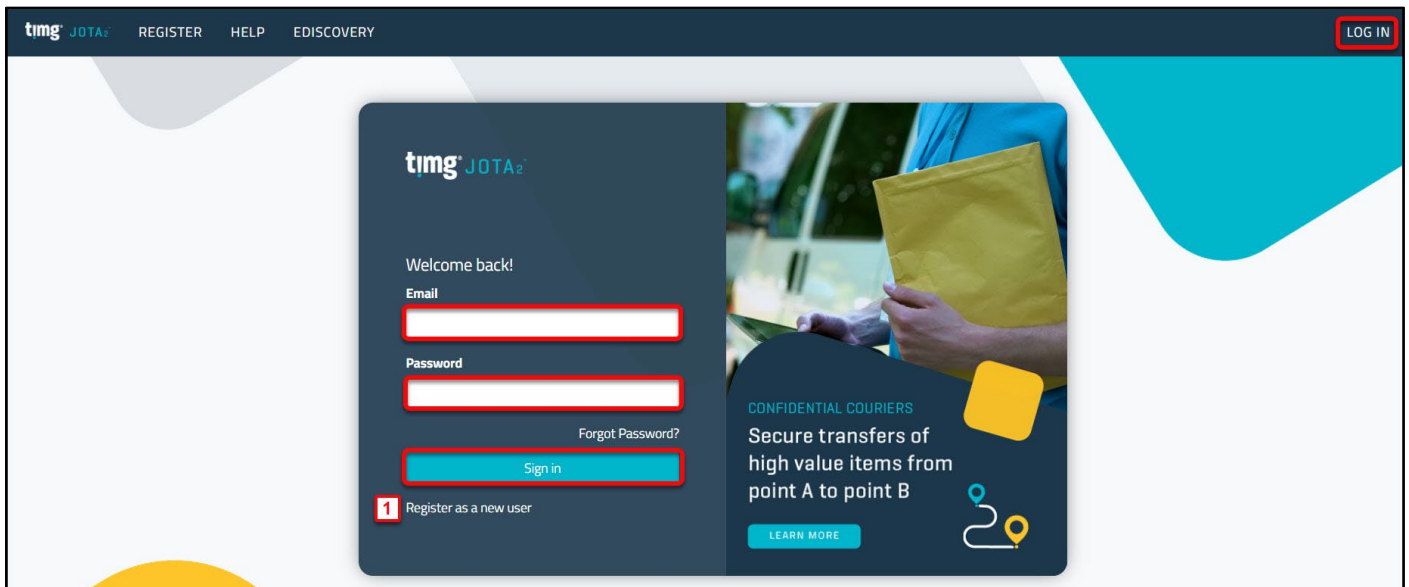
timg®

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Accessing JOTA2®

- Go to: <https://jota2.timg.com/>
NB: JOTA2® works 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**

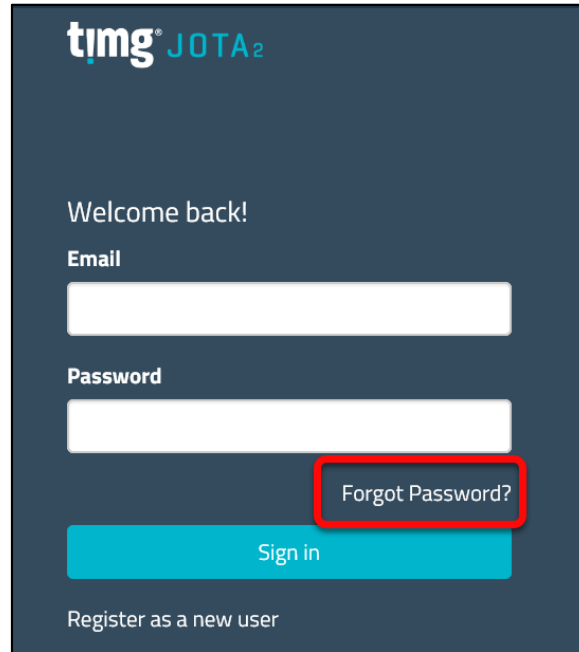


1. If you are new to JOTA2® please **Register as a new user**. Your registration will be sent to a Bureau Manager for approval. Once approved you will receive an email to create your JOTA2® password and then your JOTA2® account will be active for you to login and use.

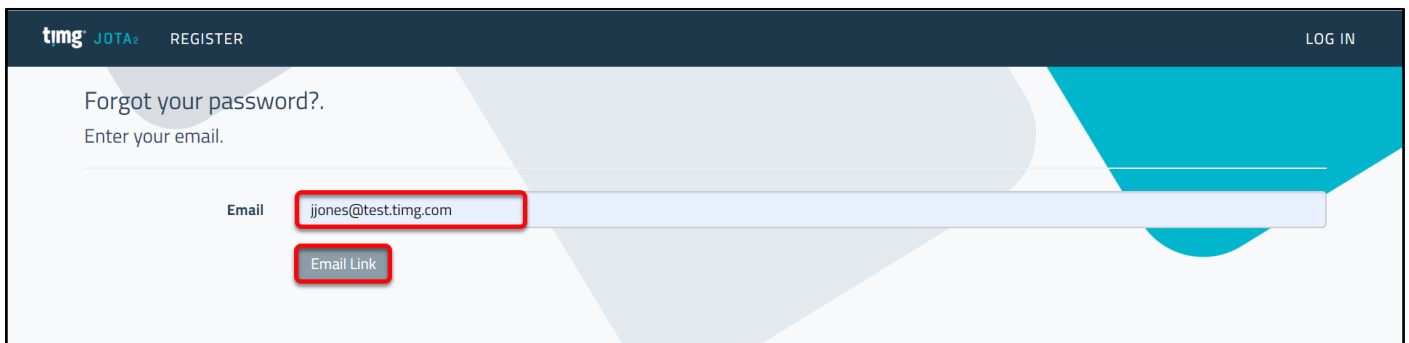
Forgot Password?

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**

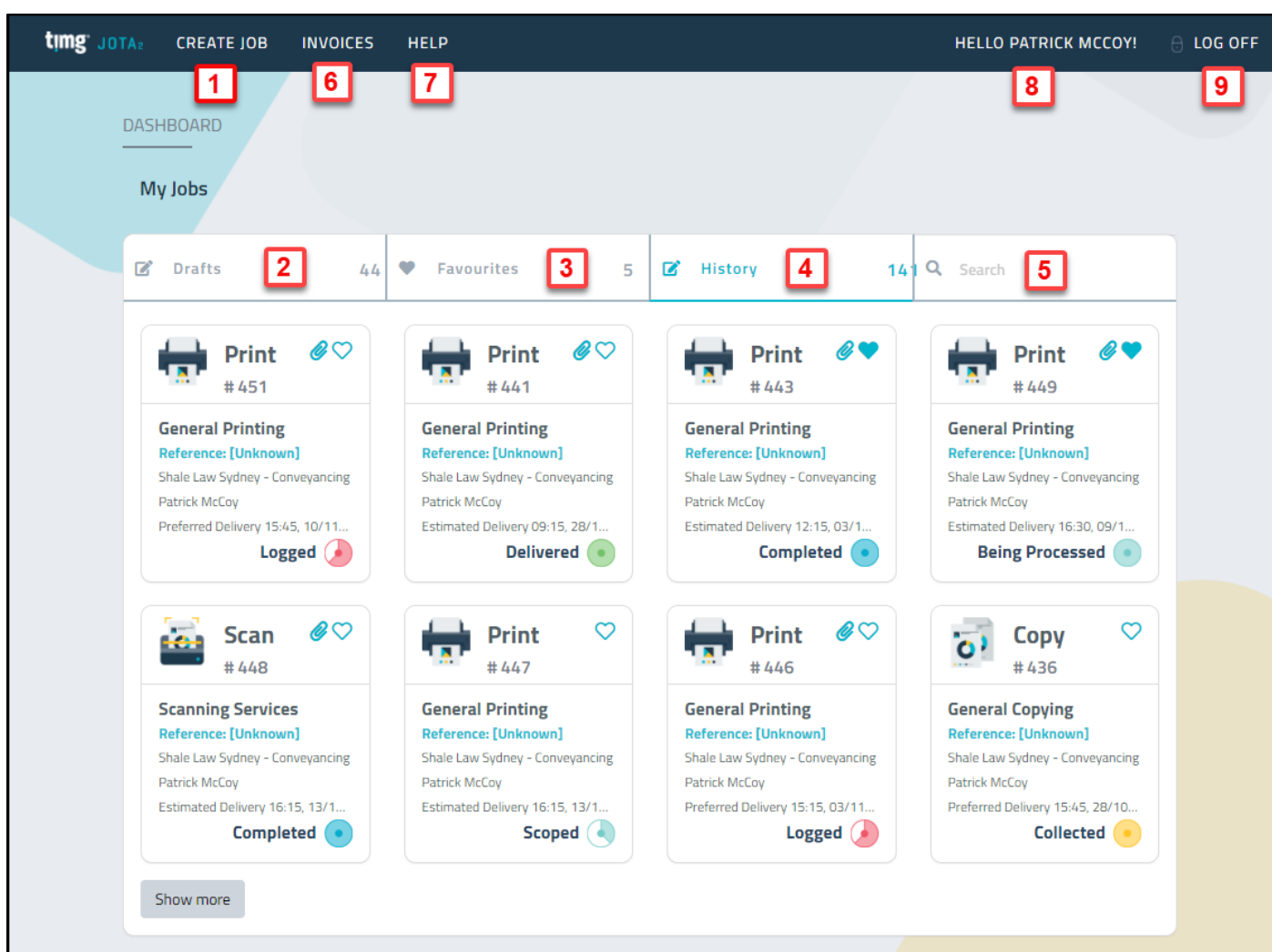


- If the email address is active, a password email link will be sent to you to reset your JOTA2® password.

Dashboard

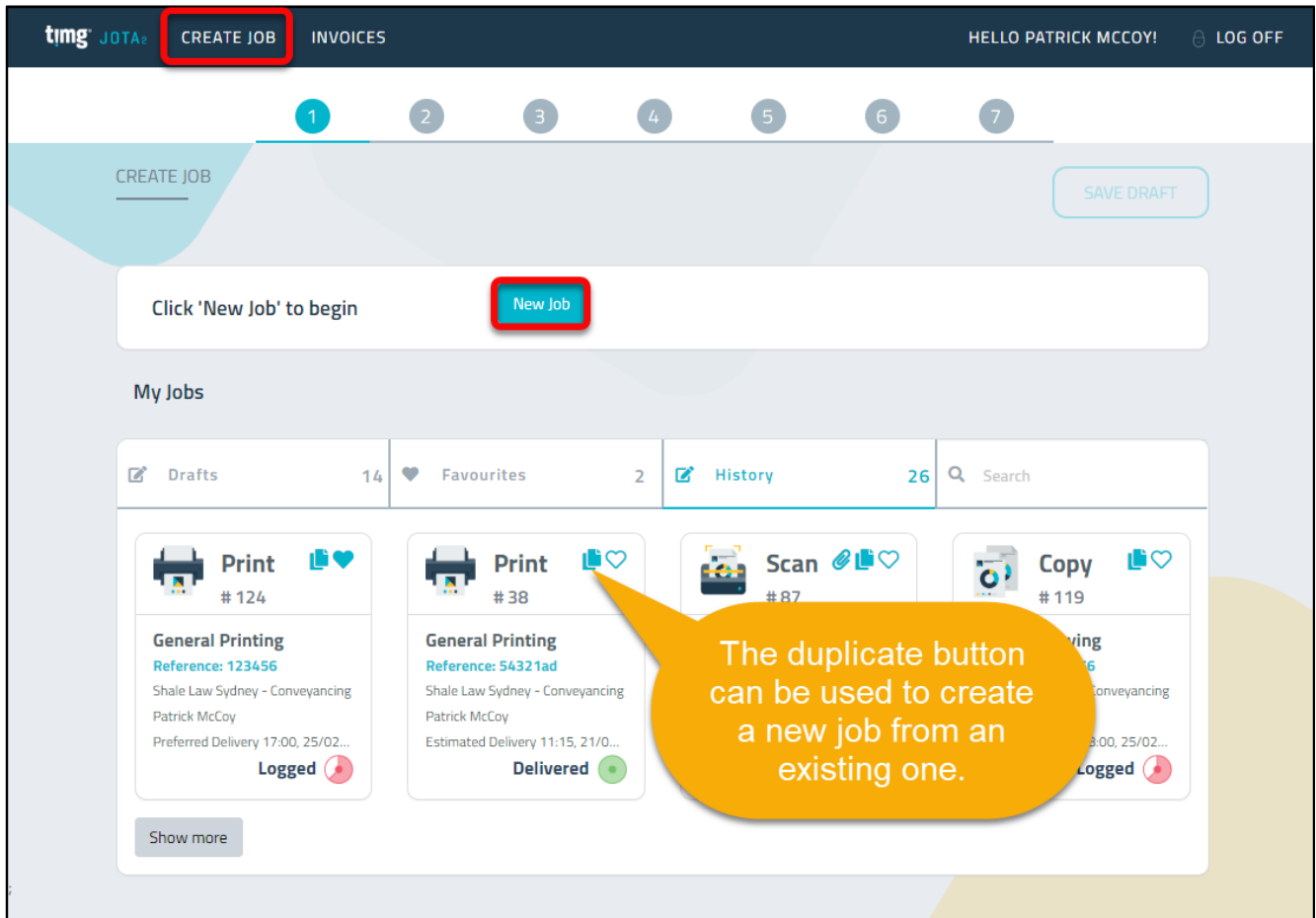
Once logged into JOTA2® you will see the **DASHBOARD** screen showing:

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®

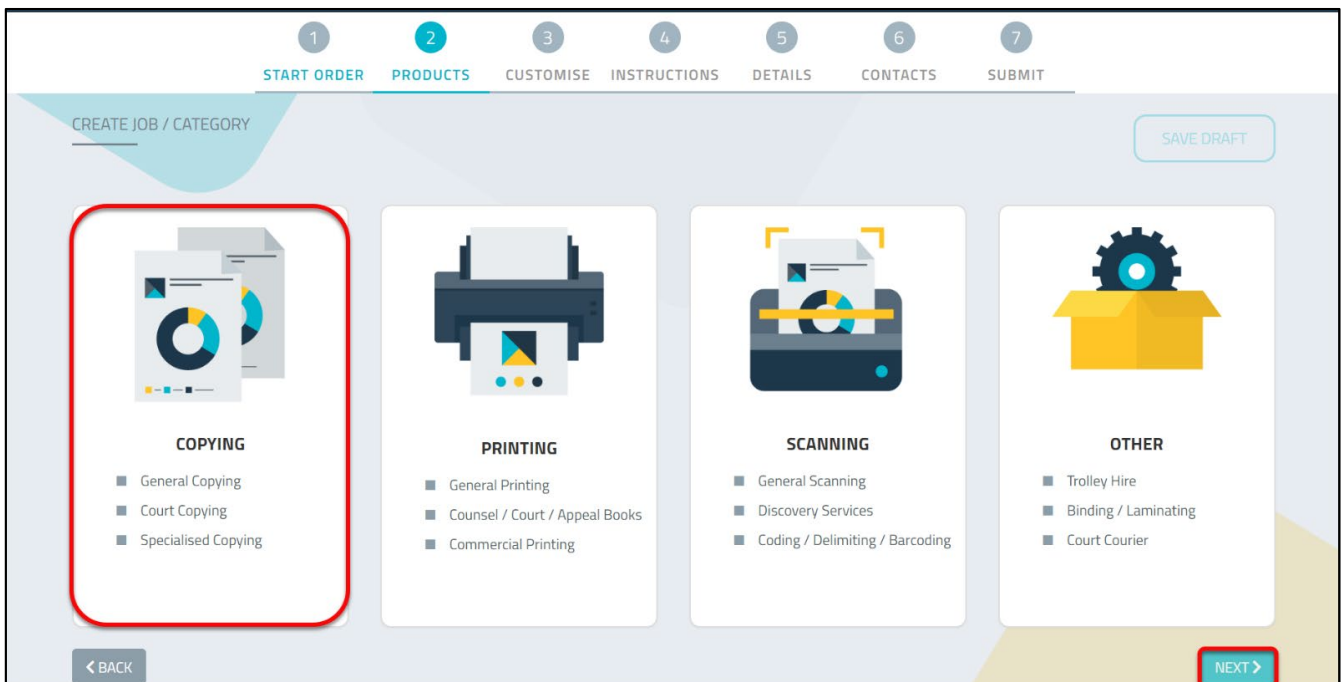


Create Job

- **Step 1: 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 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

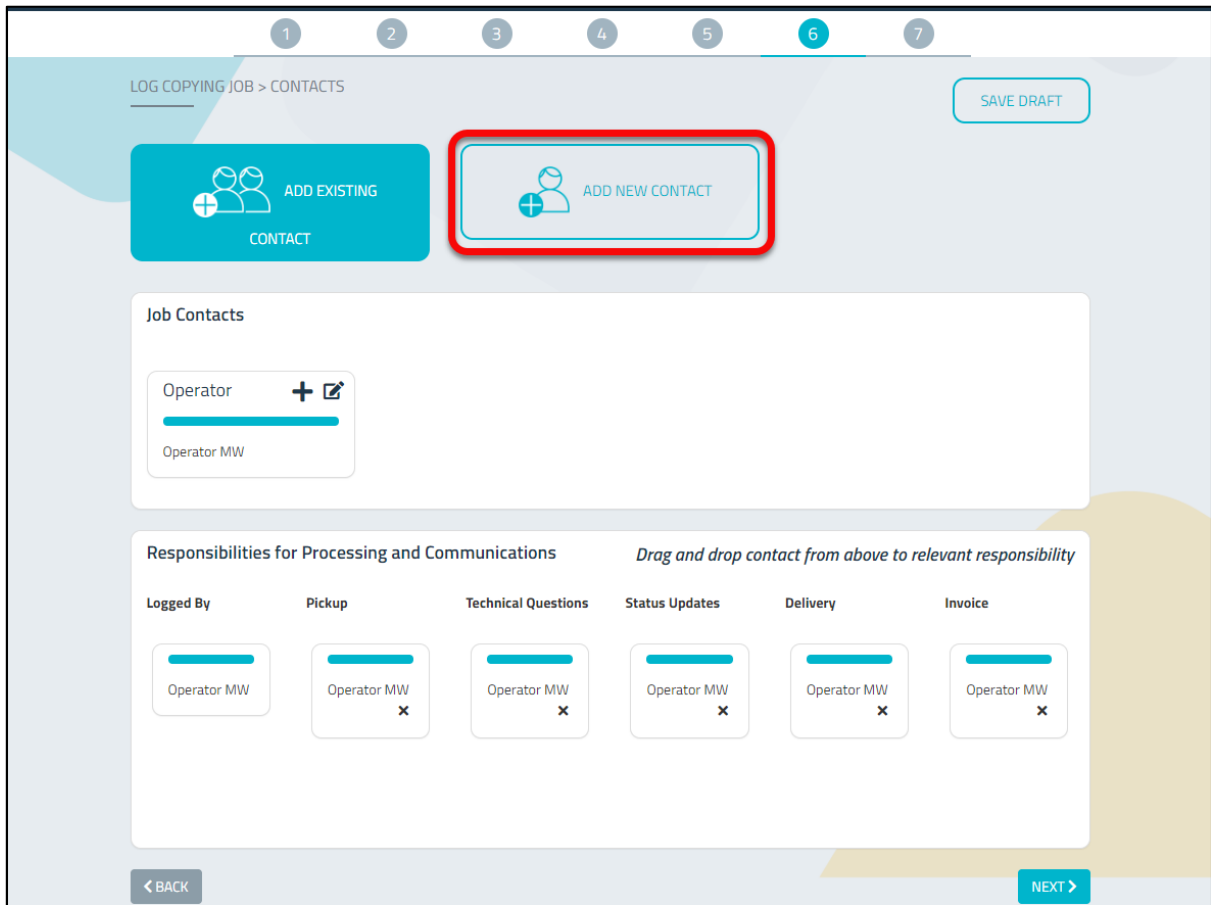
Matter/Reference Number is mandatory for some Clients.

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**

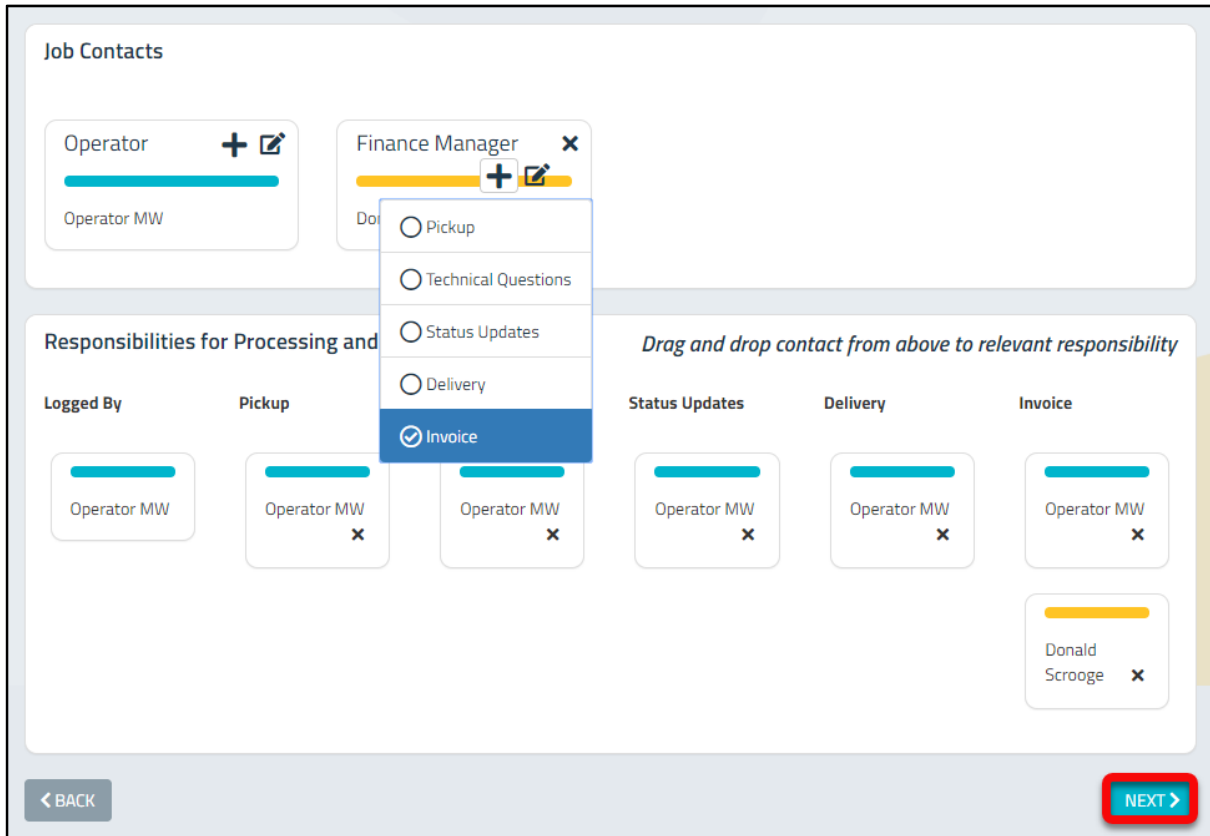
- **Step 6:** By default, you will appear as the person responsible for all processing and communications.
Other contacts can be added, and you can remove yourself from all except Logged By.
NB: There must be at least 1 contact for each responsibility.
- **ADD NEW CONTACT**



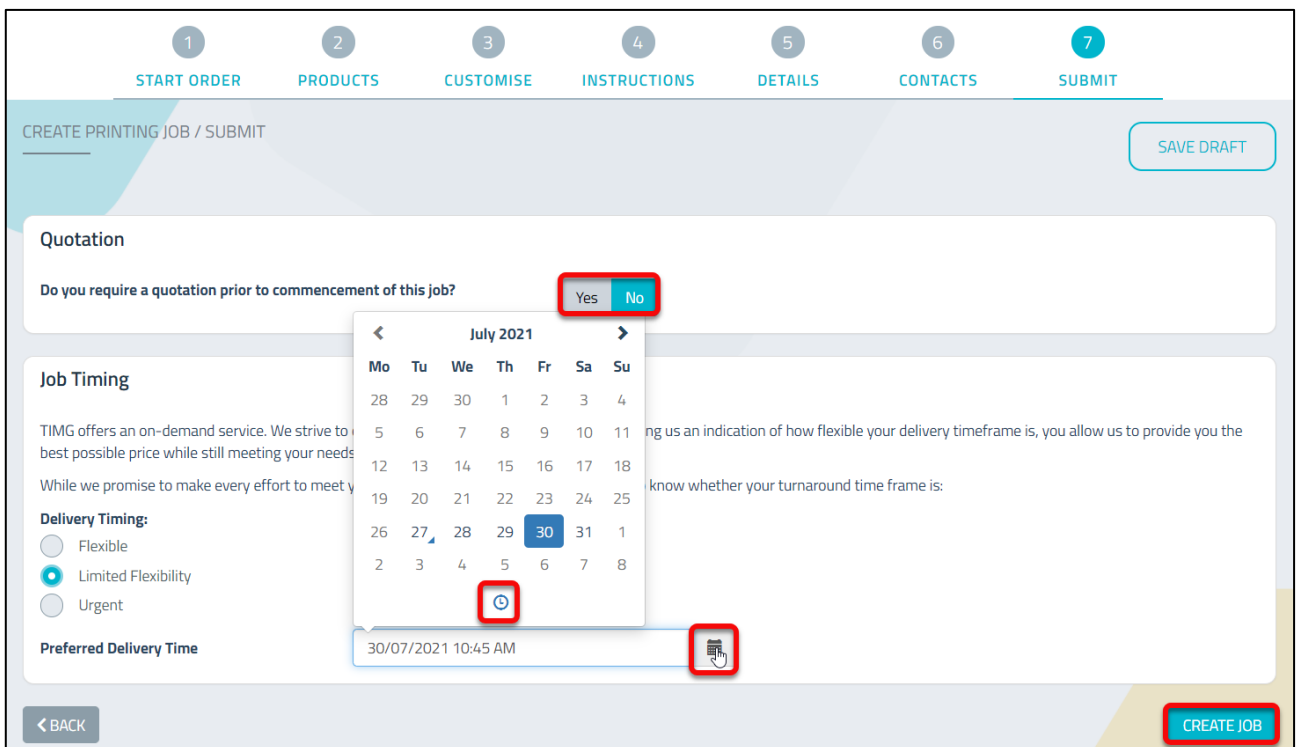
- Enter the new contact's details → **Add Contact**
NB: Address isn't mandatory but please include it for Pickup and Delivery Contacts.

The screenshot shows a form titled 'Add Job Contact'. It has two columns of input fields. The left column contains: 'First Name' (Donald), 'Last Name' (Scrooge), 'Position Title' (Finance Manager), 'Business Hours Telephone' (0212345678), and 'After Hours Telephone' (0212345678). The right column contains: 'Address 1', 'Address 2', 'City/Suburb', 'State', 'Post Code', 'Country', and 'Email' (finance@shalelaw.com). At the bottom right, there are two buttons: 'Add Contact' (highlighted with a red box) and 'Cancel'.

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



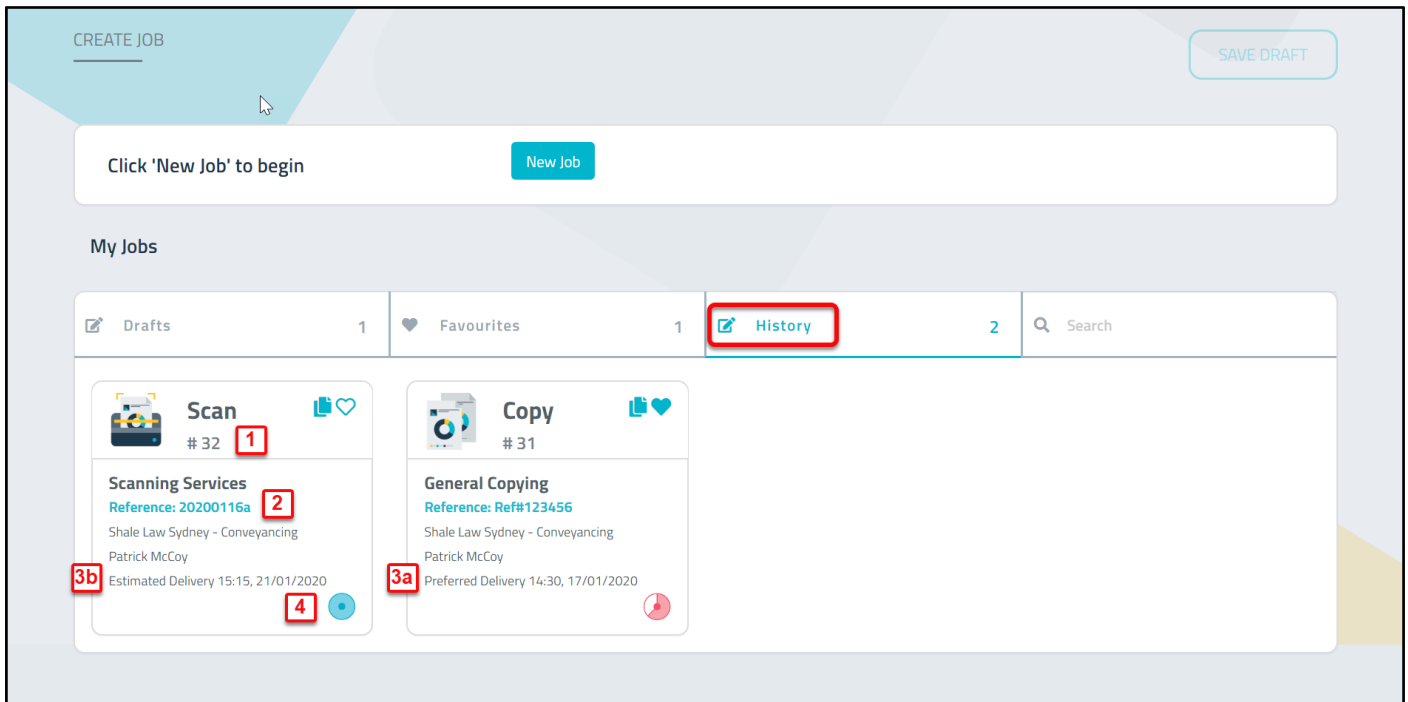
- **Step 7:** Enter if a Quote is required, Delivery Timing and Preferred Delivery Time → **CREATE JOB**
 - **Flexible** means your Preferred Delivery Time can be altered by a day or more.
 - **Limited Flexibility** means your Preferred Delivery Time can be altered by hours.
 - **Urgent** means you do 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.

Job History

Job History can be accessed from the **Dashboard** and **Create Job** screens.



Each job summary will display the following details:

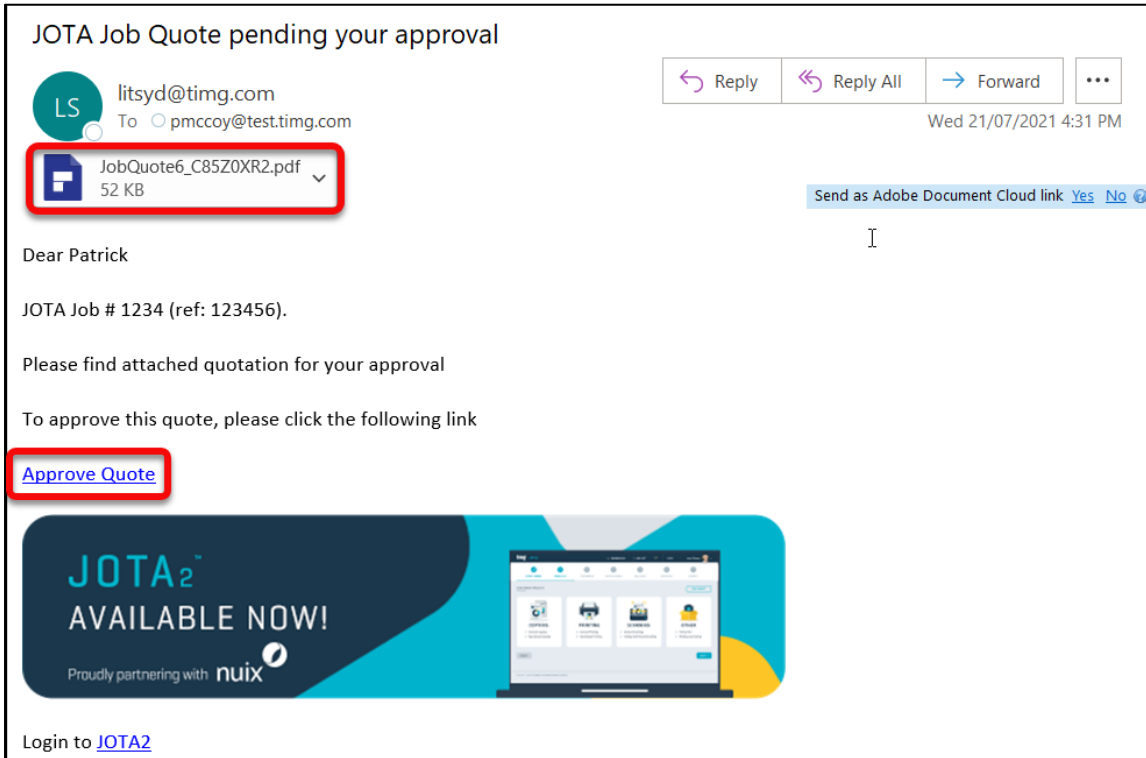
1. **Job ID number:** Each job is assigned a unique job ID number. Please quote this number when speaking to TIMG staff.
2. **Reference Number:** Is the matter/reference number you entered when you created the job.
3. A) **Preferred Delivery** is your nominated preferred delivery time and will show after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

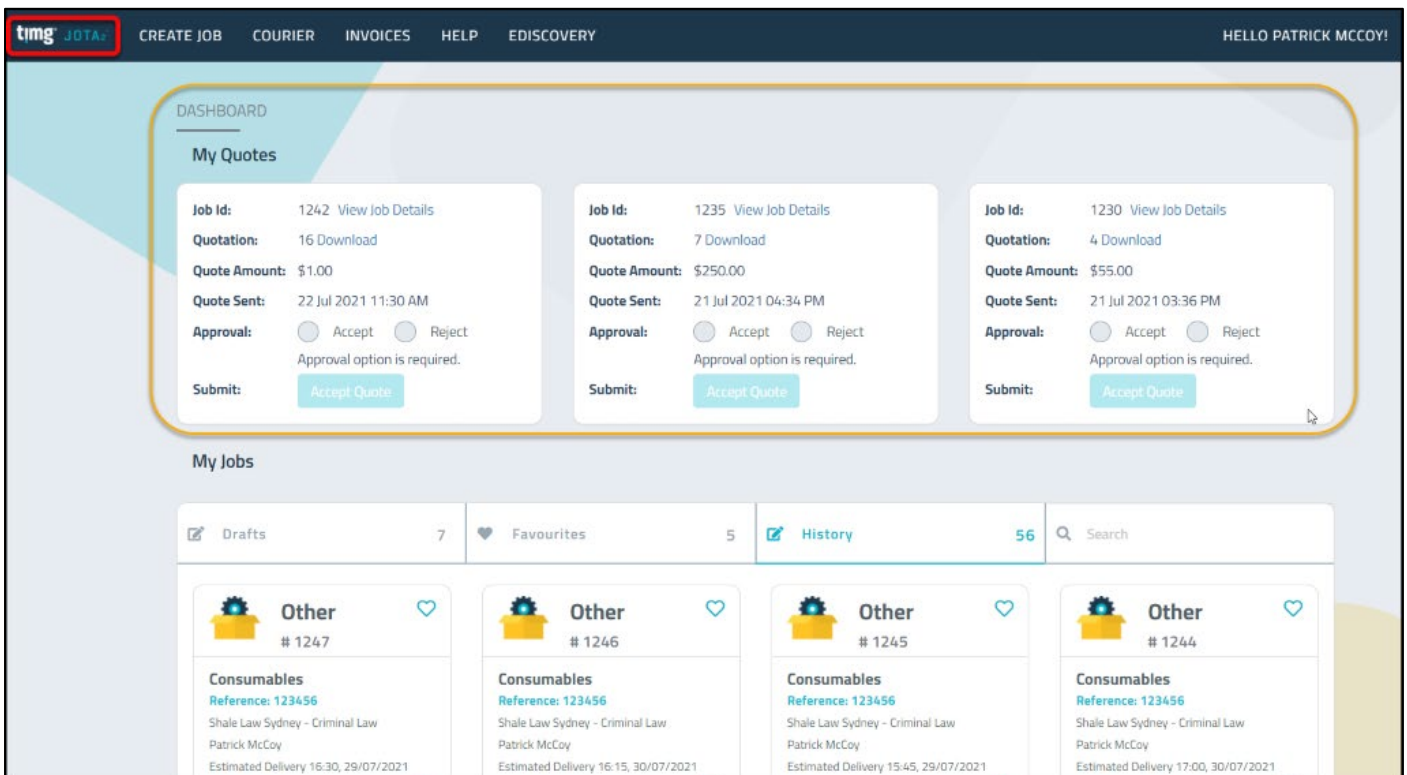
Quote

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**

VIEW COPYING JOB #92 / DETAILS

COMMUNICATION HISTORY

SAVE CANCEL JOB

CUSTOMISE

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: Discs:

Boxes:

Number of Copies

Copies Required: 10

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

Job Notes - Job 92

Conversation History - No messages found

Add Job Notes

Note Type: Technical Instruction Issue Other

Notes: Please make 20 copies instead of 10

Add

- Your Job Note has been added.

Job Notes - Job 92

February 2020

Patrick McCoy 17/02/2020 10:53:43 AM PM

INSTRUCTION

Please make 20 copies instead of 10

Add Job Notes

Note Type: Technical Instruction Issue Other

Notes:

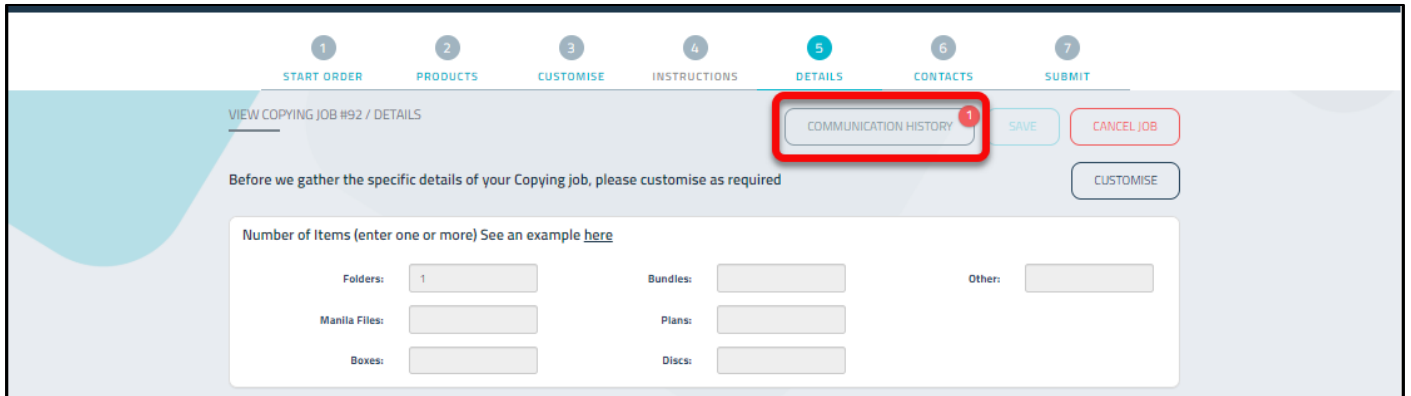
NB: After TIMG staff have read the note, they will mark it as acknowledged. 📧

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

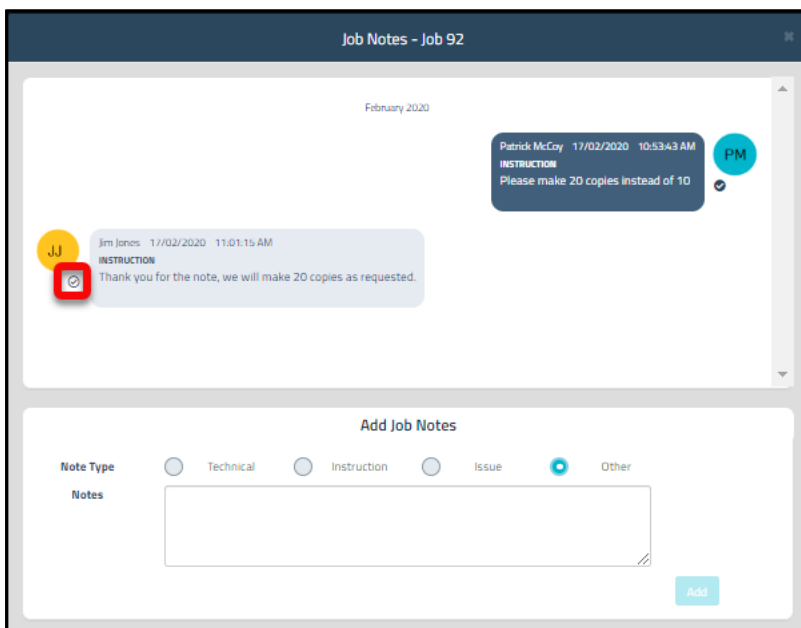
Emails will be sent to alert the nominated job stakeholders to the new Job Note as follows:

- 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**



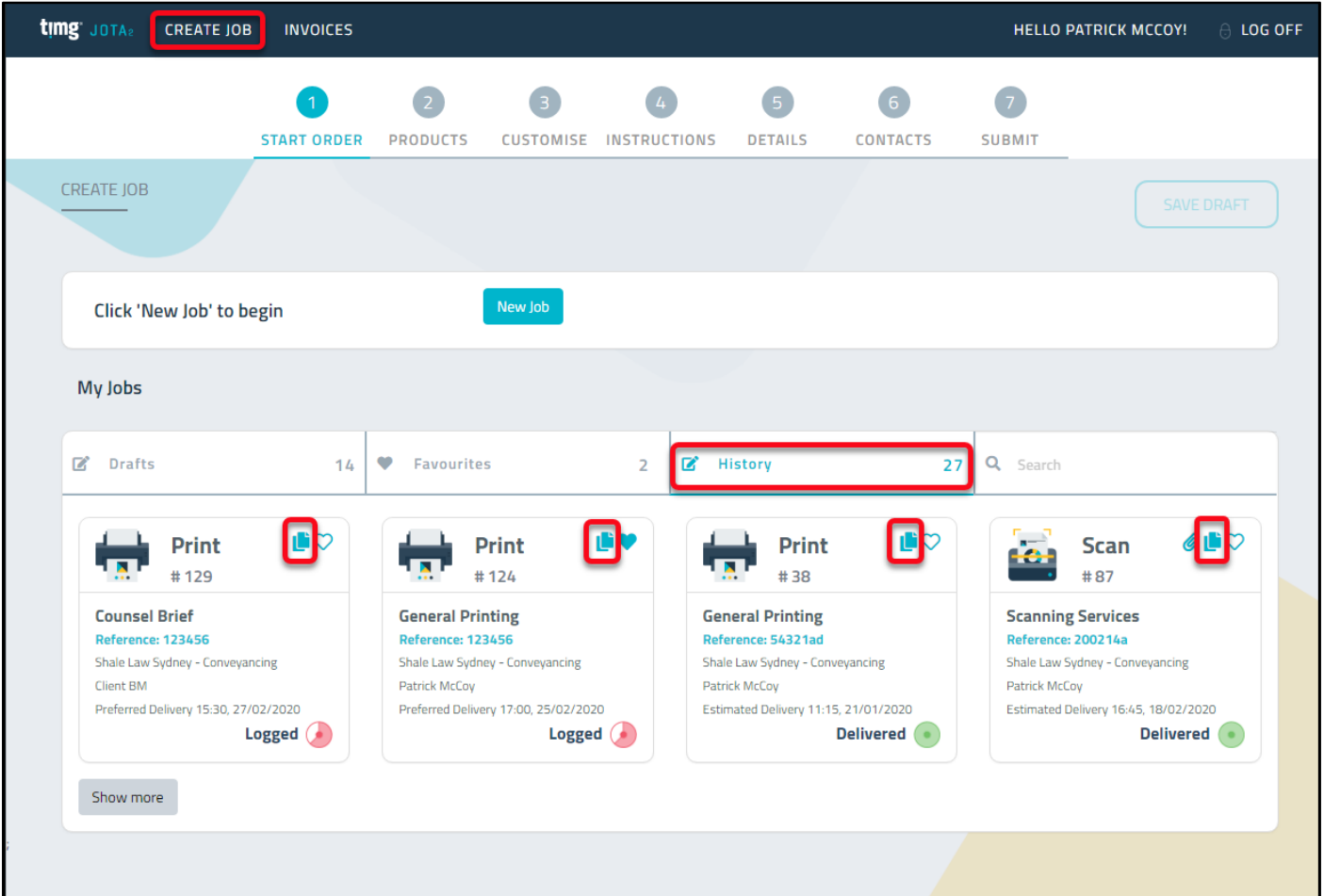
- Click the Job Note to acknowledge you have read it.



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

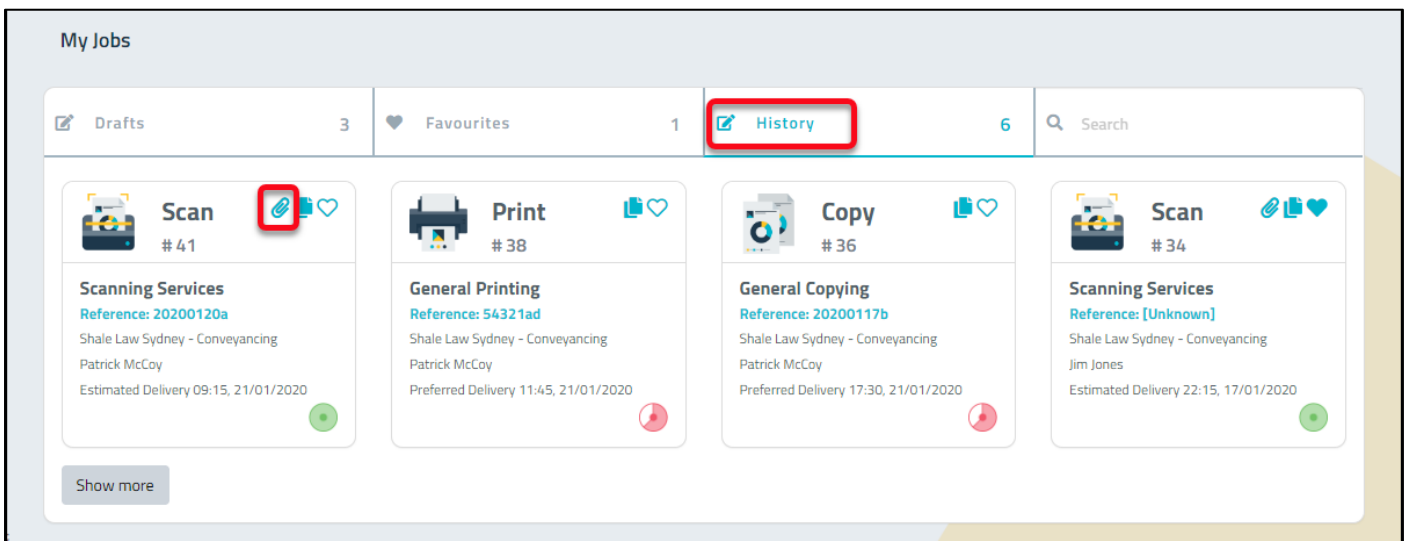
eDOC files is the JOTA2® repository for electronic files and can be accessed by a job's Paperclip icon. 

2000MB is the maximum size for each 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.

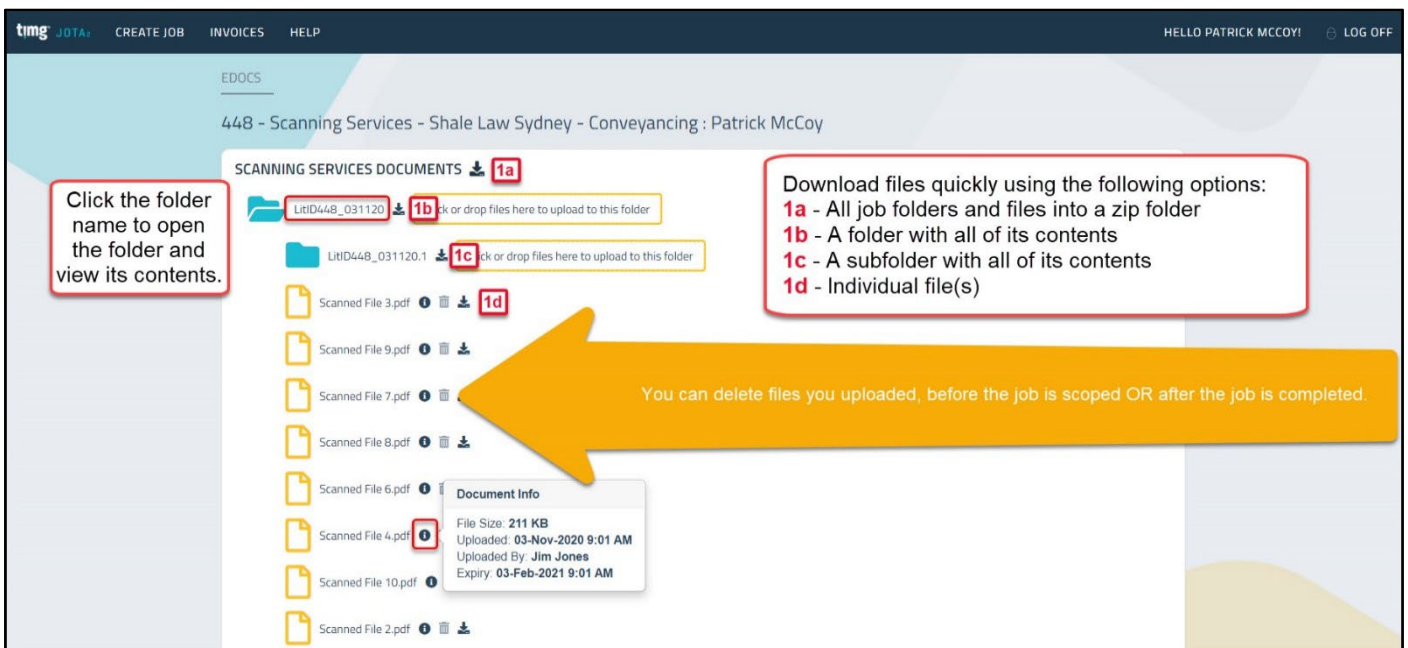
eDOC is particularly useful for:

- **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.



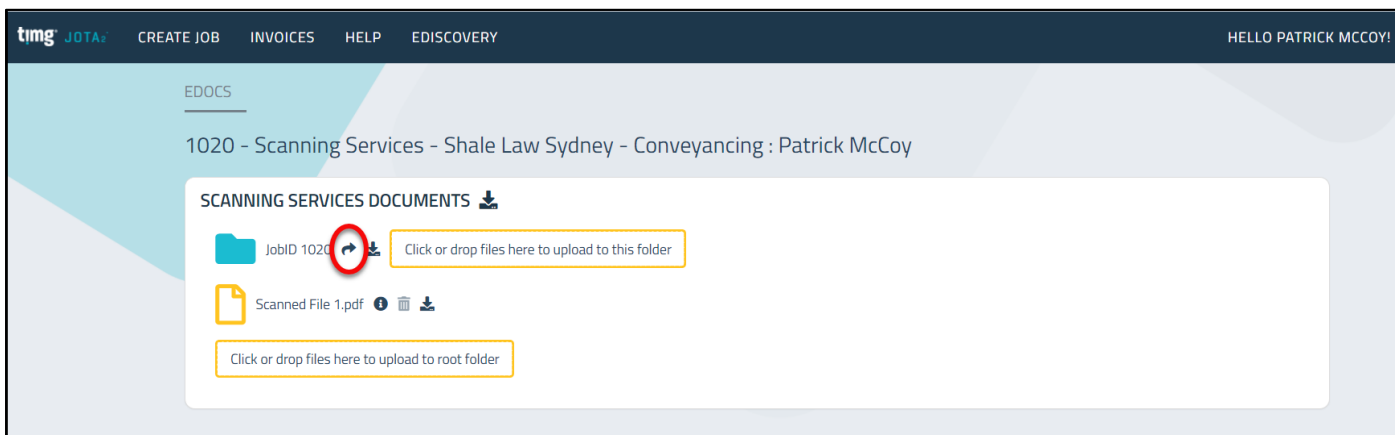
You may have multiple folders and files to access.



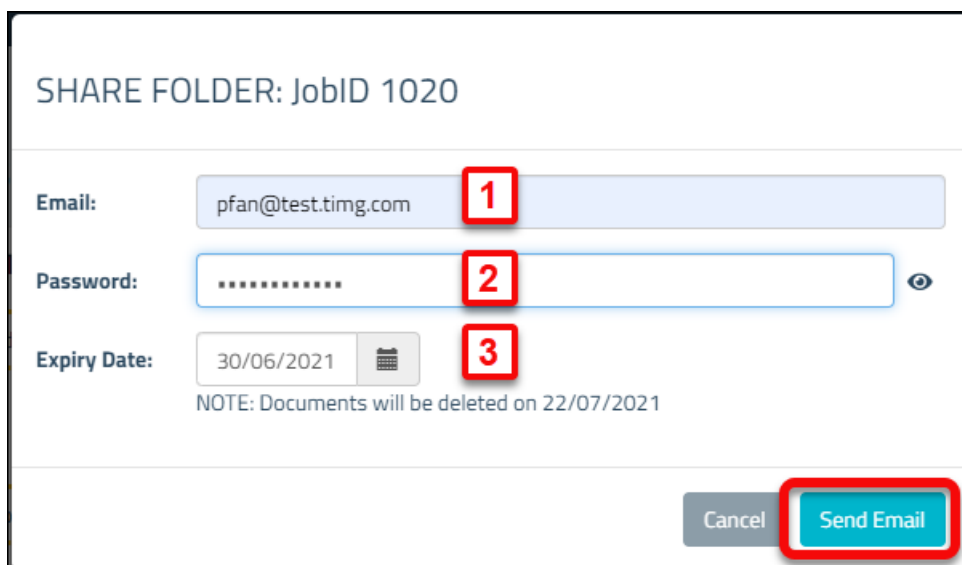
eDOC Share Folder

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.
 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**

A screenshot of the 'SHARE FOLDER: JobID 1020' form. The form has three main input fields: 'Email' with the value 'pfan@test.timg.com' and a red box labeled '1' around it; 'Password' with a masked password '.....' and a red box labeled '2' around it; and 'Expiry Date' with the value '30/06/2021' and a red box labeled '3' around it. Below the expiry date field is a note: 'NOTE: Documents will be deleted on 22/07/2021'. At the bottom right, there are two buttons: 'Cancel' and 'Send Email', with the 'Send Email' button highlighted by a red box.

- 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.

| Email | Expiry | Action |
|--------------------|------------|--------|
| pfan@test.timg.com | 30/06/2021 | |

3 Cancel **4** 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.

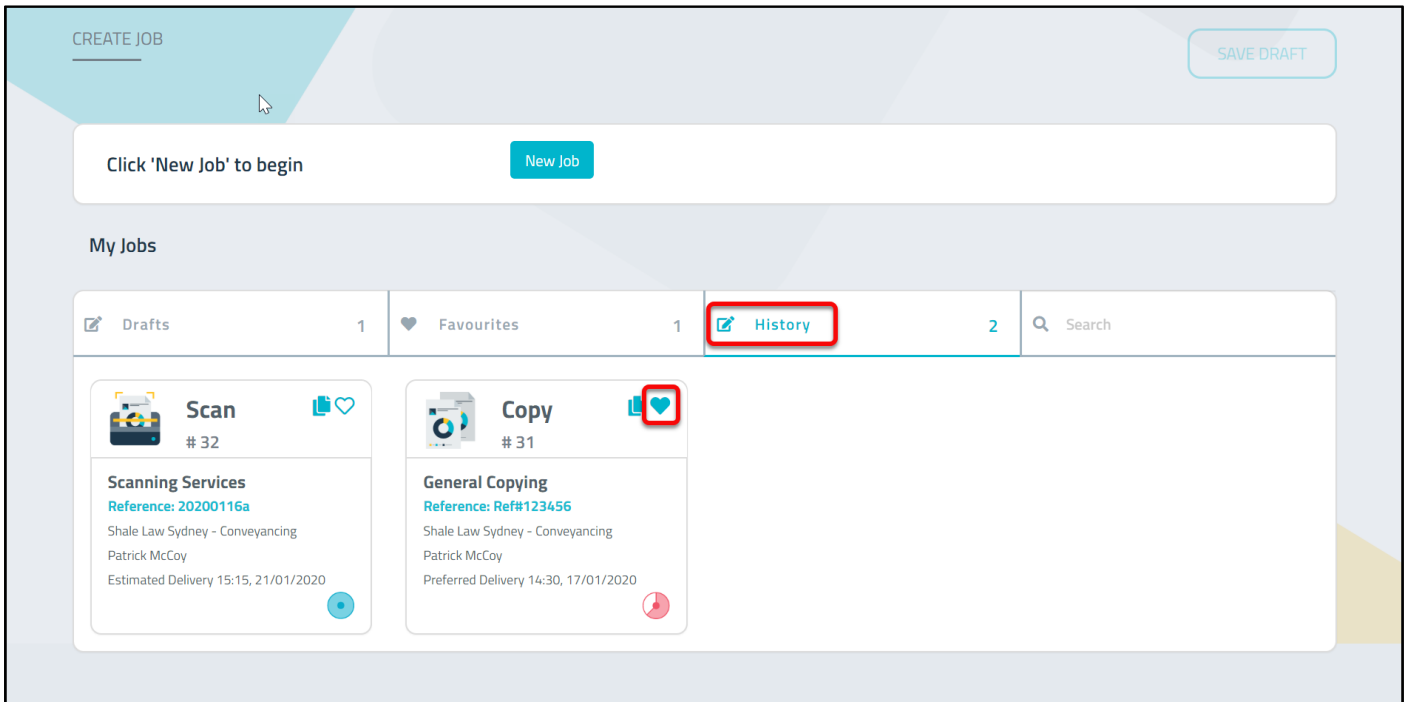
NB: Link can be used to test access to the shared eDoc folder.

1 Resend Email **2** Update

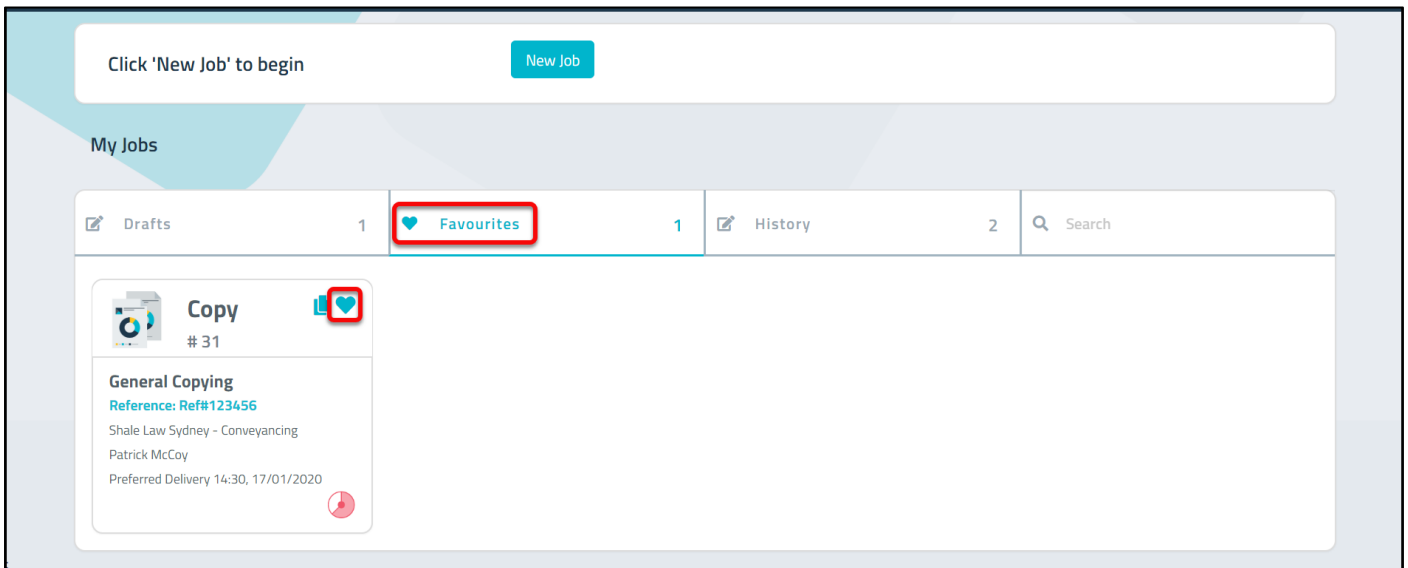
Job Favourites

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.

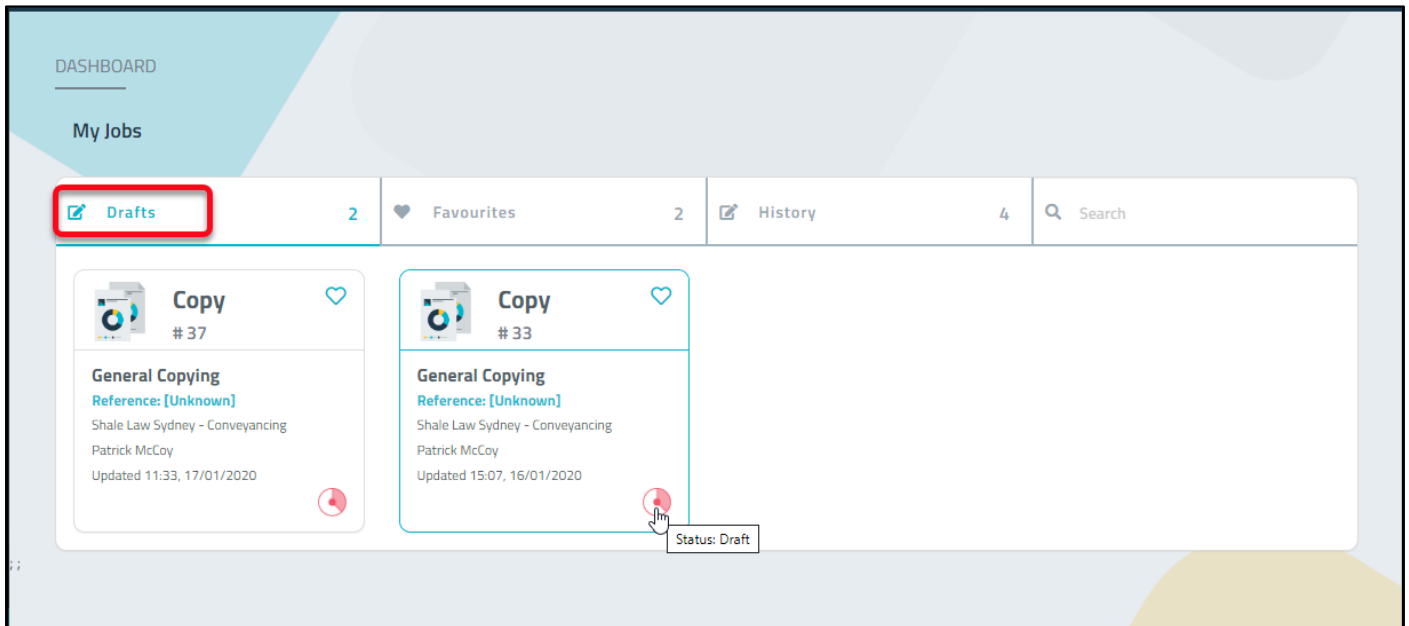


To remove jobs from your favourites, unselect the heart icon. 

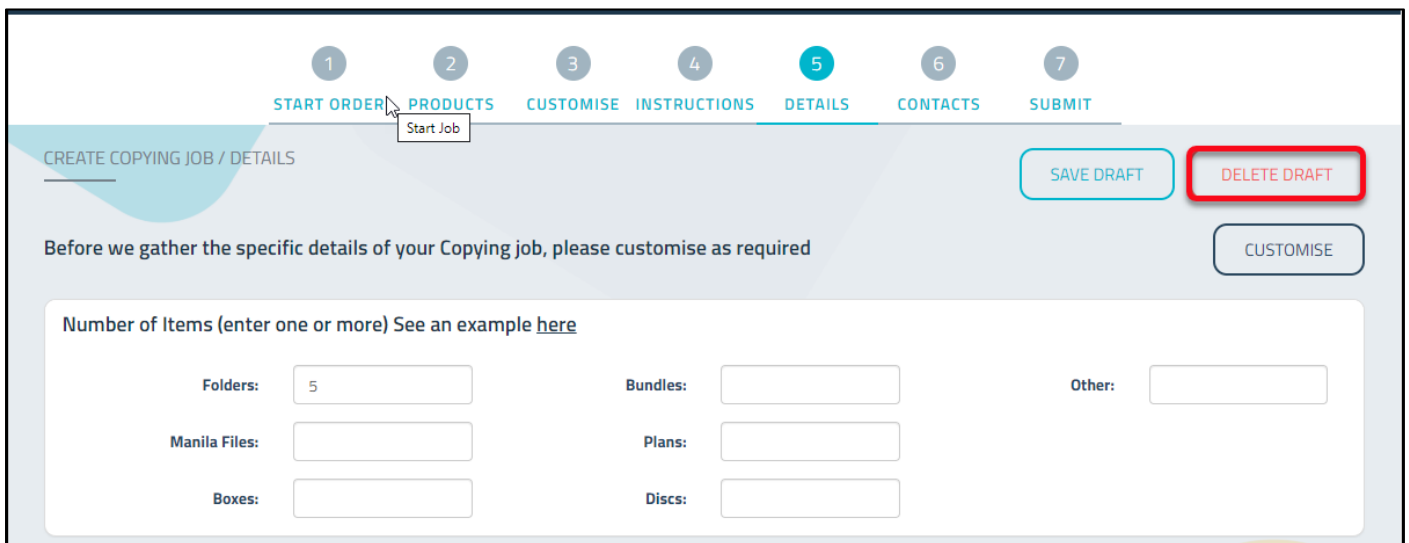
Job Drafts

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.



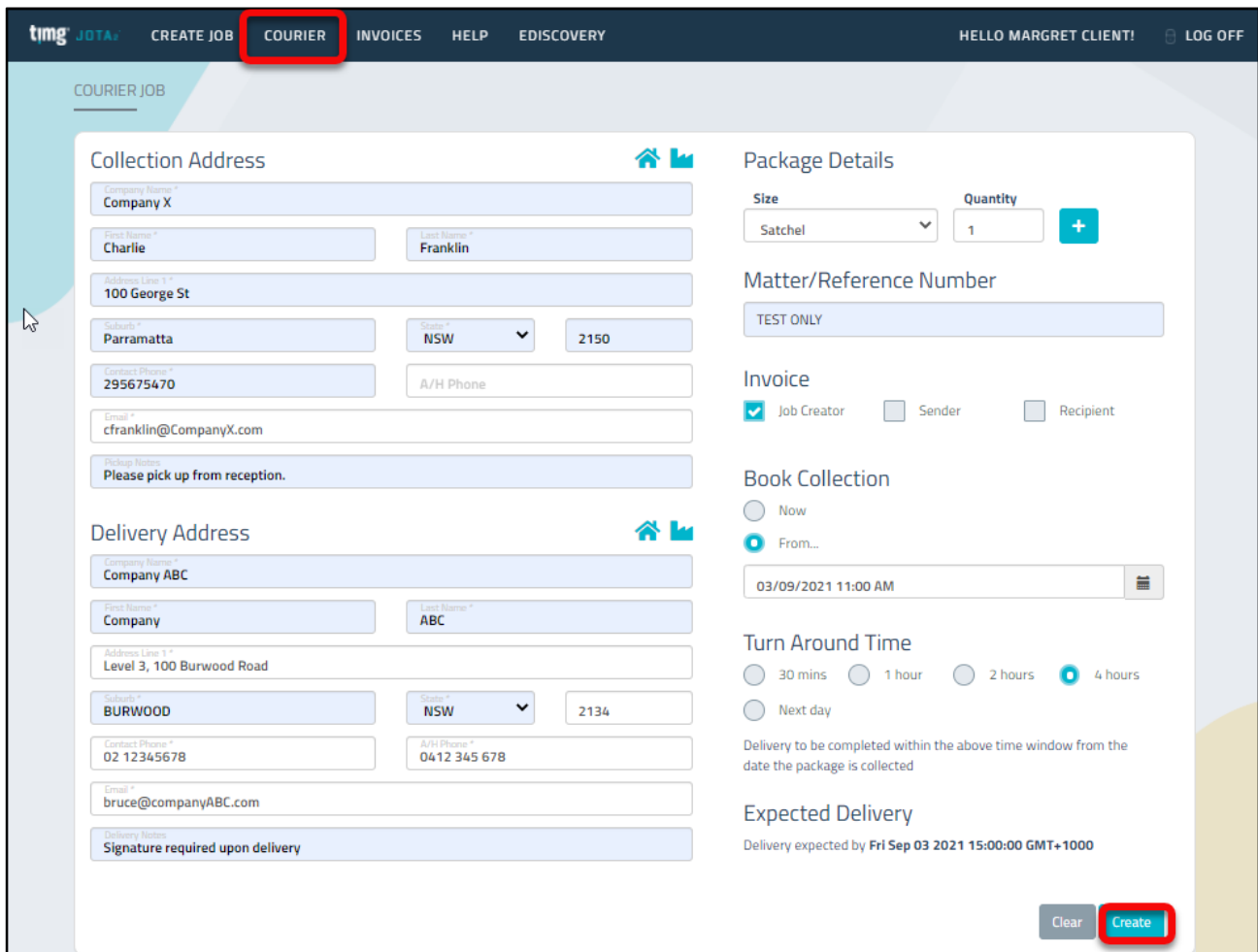
Courier

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

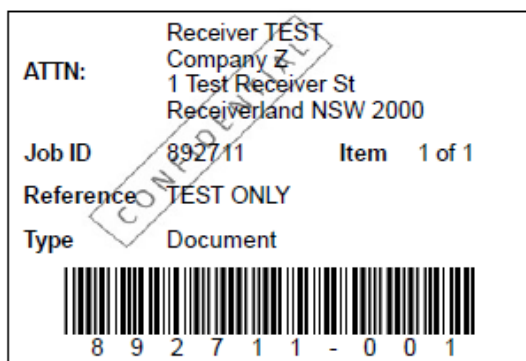
- Select **COURIER** → enter courier job details → **CREATE**.

 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.

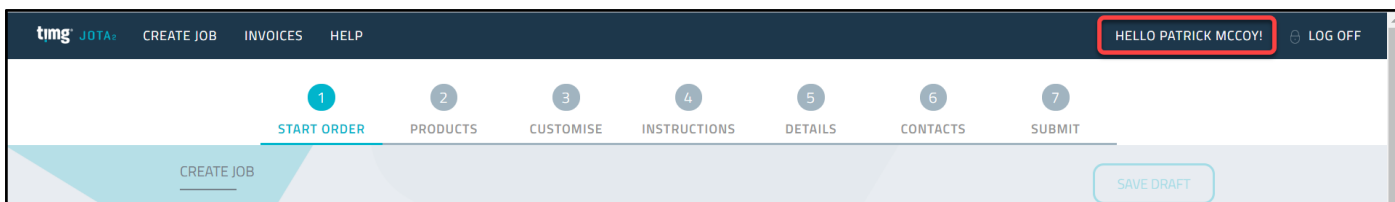


Buddy Users

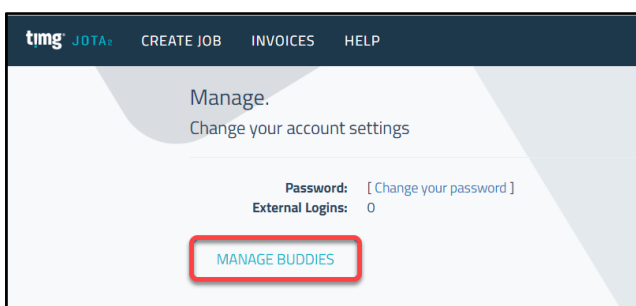
A buddy is a JOTA2® user who can access your draft and submitted jobs.

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

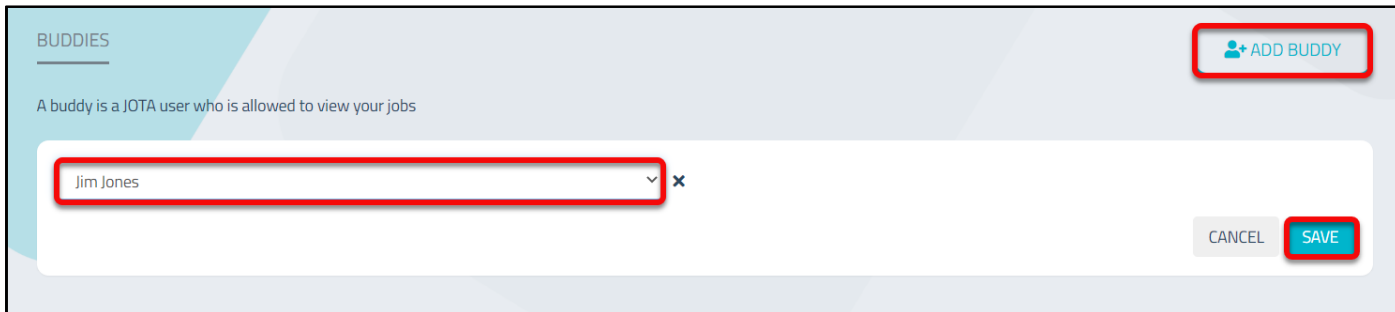
- Click on your name.



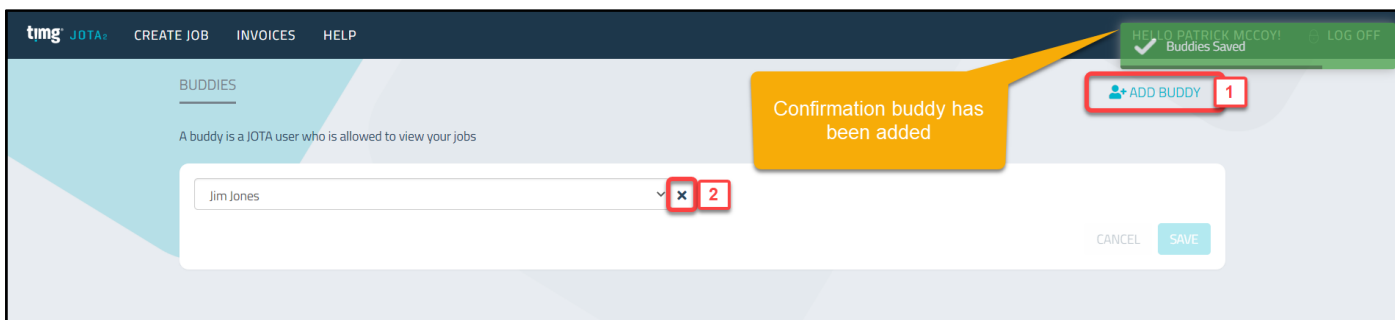
- Click **Manage Buddies**.



- Click **ADD BUDDY** → select your buddy → **SAVE**



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



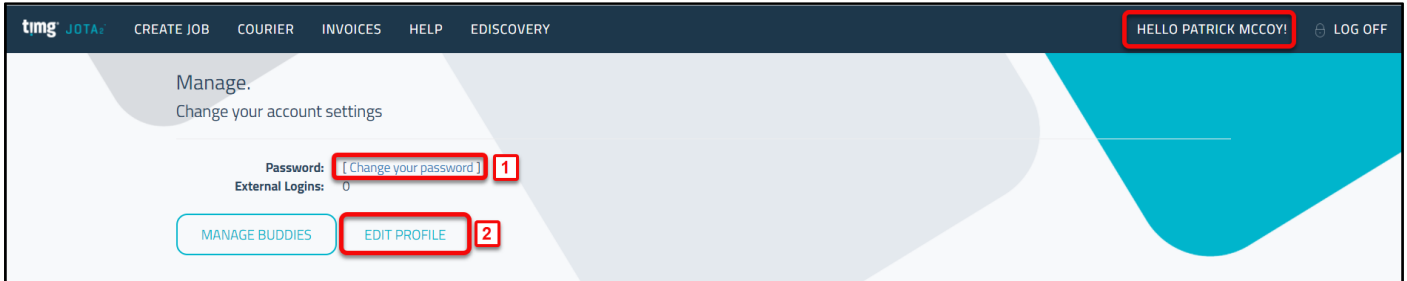
After adding a buddy, you can then:

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:

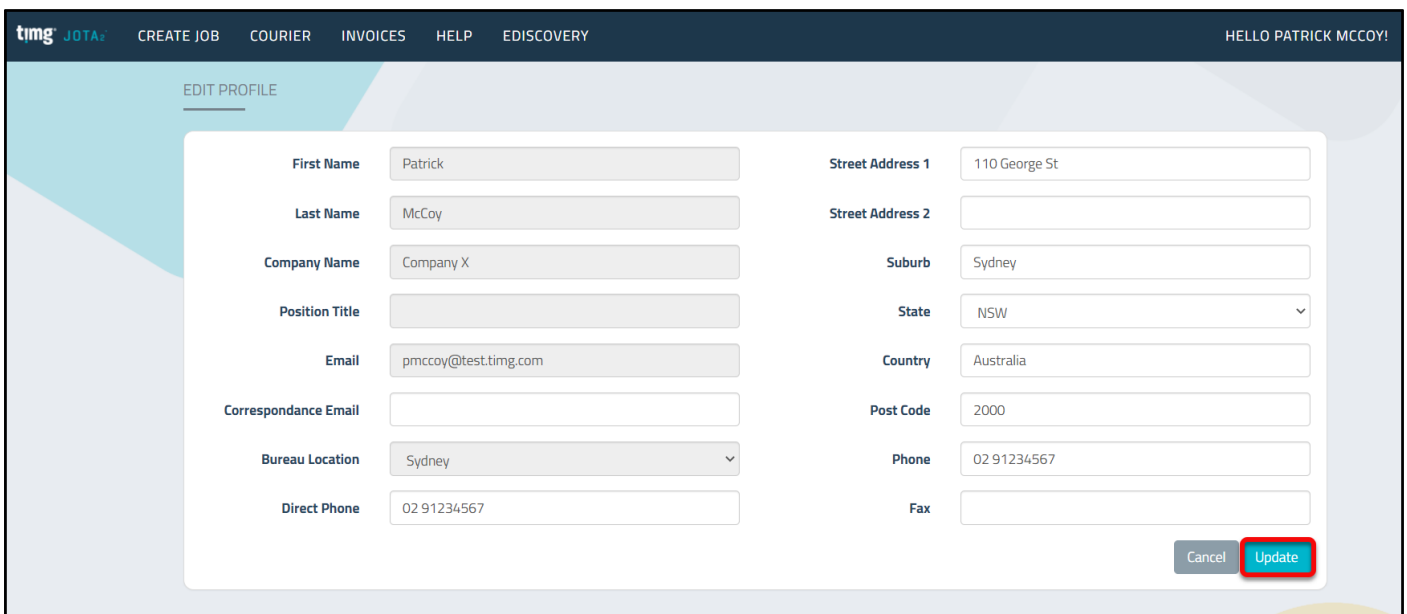
1. Change your password
2. Edit Profile



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.

The screenshot shows the 'INVOICES' search interface in the TIMG JOTA2 system. The search criteria are: Date From (empty), Date To (empty), Matter / Reference (empty), Invoice Number (empty), Job Id (empty), Invoice Type (All), and Payment Status (All). A 'Bulk Download' button (7a) and a 'Search' button are visible. The search results table is as follows:

| <input type="checkbox"/> | Job Id | Invoice No | Invoice Date | Total | Type | Payment | Deleted | Action |
|-------------------------------------|--------|------------|--------------|--------------|-------------|---------|---------|---|
| <input checked="" type="checkbox"/> | 38 | INV400124 | 01/01/2020 | \$187.00 | Standard | Unpaid | No | <input checked="" type="checkbox"/> [8] [9] |
| <input checked="" type="checkbox"/> | 38 | 000001 | 01/01/2020 | \$187.00 | Credit Note | Unpaid | No | [8] [9] |
| <input checked="" type="checkbox"/> | 62 | INV400125 | 31/01/2020 | \$125.40 | Standard | Unpaid | No | [8] [9] |
| <input type="checkbox"/> | 87 | INV400123 | 31/01/2020 | \$119,614.00 | Standard | Unpaid | No | [8] [9] |
| <input type="checkbox"/> | 232 | INV435408 | 29/06/2020 | \$99.79 | Standard | Unpaid | No | [8] [9] |

At the bottom of the table, there are navigation buttons: First, Previous, 1 (selected), Next, Last, and a Page Size dropdown set to 10.

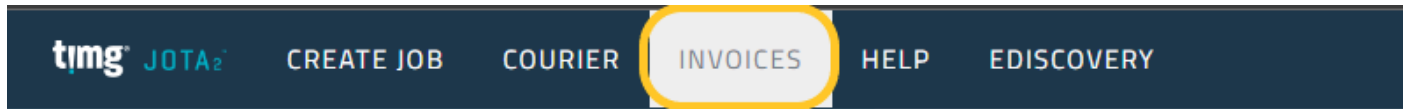
- Invoices can be downloaded in:
 - Bulk – select the required invoices [7] then Bulk Download [7a] into a zip folder.
 - Individually – select the download Action icon [8] for the required invoice.
- To pay an invoice by credit card, select the \$ Action icon [9].

How to Consolidate Invoices

What invoices can be consolidated?

Standard Unpaid Invoices

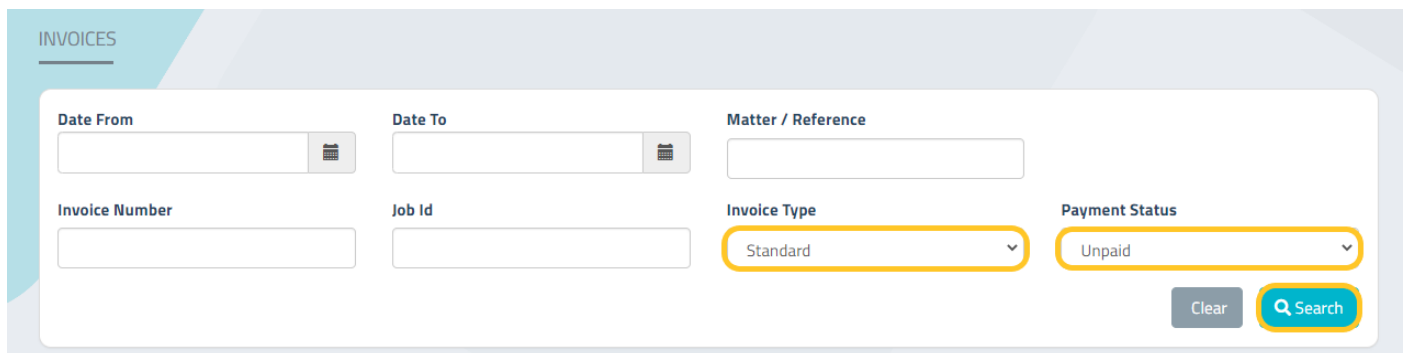
Step 1: Click on Invoices



Step 2: Run the following search:

- Invoice Type = Standard
- Payment Status = Unpaid

Step 3: Click on Search

A search form titled 'INVOICES' with a light blue header. It contains several input fields: 'Date From' and 'Date To' (with calendar icons), 'Matter / Reference', 'Invoice Number', 'Job Id', 'Invoice Type' (a dropdown menu with 'Standard' selected), and 'Payment Status' (a dropdown menu with 'Unpaid' selected). At the bottom right, there are 'Clear' and 'Search' buttons. The 'Invoice Type' and 'Payment Status' dropdowns are highlighted with yellow rounded rectangles.

Step 4: Click on the tick box and select multiple invoices and then click the consolidate button.

Note: Different users from the same account can consolidate invoices.

A bcc email will get sent to our finance team when a consolidated invoice is created so they can reconcile all the individual invoice notes.

The screenshot shows the 'INVOICES' section of a software interface. At the top, there are search filters for 'Date From', 'Date To', 'Matter / Reference', 'Invoice Number', 'Job Id', 'Invoice Type' (set to 'Standard'), and 'Payment Status' (set to 'Unpaid'). Below the filters are buttons for 'Bulk Download' and 'Consolidate' (highlighted with a yellow border), along with 'Clear' and 'Search' buttons.

| <input type="checkbox"/> | Job Id | Invoice No | Owner Name | Invoice Date | Total | Type | Payment | Deleted | Action |
|-------------------------------------|--------|------------------|---------------|--------------|------------|----------|---------|---------|--------|
| <input type="checkbox"/> | 1161 | SHALE_CS100168 | Patrick McCoy | 02/02/2022 | \$4,301.00 | Standard | Unpaid | No | |
| <input checked="" type="checkbox"/> | 1259 | SHALE_TEST001259 | Patrick McCoy | 19/05/2022 | \$110.00 | Standard | Unpaid | No | |
| <input checked="" type="checkbox"/> | 1189 | SHALE_TEST001189 | Patrick McCoy | 23/05/2022 | \$146.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1157 | SHALE_TEST001157 | Patrick McCoy | 23/05/2022 | \$154.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1288 | SHALE_TEST001288 | Fran Family | 24/05/2022 | \$220.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1286 | SHALE_TEST001286 | Fran Family | 24/05/2022 | \$275.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1334 | 1334 | Patrick McCoy | 08/06/2022 | \$110.00 | Standard | Unpaid | No | |

At the bottom of the table, there are navigation buttons: 'First', 'Previous', '1' (highlighted), 'Next', and 'Last'. To the right, there is a 'Page Size' dropdown menu set to '10'.

Step 5: The Consolidated Invoice will download in your web browser.

The screenshot shows a web browser window with the address bar displaying 'https://jota.timg.com'. The page content includes a copyright notice '© 2022 - TIMG'. A download notification bar is visible at the bottom, showing a PDF icon and the filename 'Consolidated(1).pdf'. To the right of the notification bar is a 'Show all' button with a close icon.

Step 6: Search for All Unpaid invoices and select the dollar sign to make the payment.

Note: Consolidated invoices are be given a new invoice number.

INVOICES

Date From: Date To: Matter / Reference:

Invoice Number: Job Id: Invoice Type: **All** Payment Status: **Unpaid**

| <input type="checkbox"/> | Job Id | Invoice No | Owner Name | Invoice Date | Total | Type | Payment | Deleted | Action |
|--------------------------|--------|------------------|---------------|--------------|------------|--------------|---------|---------|--------|
| <input type="checkbox"/> | | SHALE_CS100169 | Patrick McCoy | 02/08/2022 | \$256.00 | Consolidated | Unpaid | No | |
| <input type="checkbox"/> | 1161 | SHALE_CS100168 | Patrick McCoy | 02/02/2022 | \$4,301.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1259 | SHALE_TEST001259 | Patrick McCoy | 19/05/2022 | \$110.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1189 | SHALE_TEST001189 | Patrick McCoy | 23/05/2022 | \$146.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1157 | SHALE_TEST001157 | Patrick McCoy | 23/05/2022 | \$154.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1288 | SHALE_TEST001288 | Fran Family | 24/05/2022 | \$220.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1286 | SHALE_TEST001286 | Fran Family | 24/05/2022 | \$275.00 | Standard | Unpaid | No | |
| <input type="checkbox"/> | 1334 | 1334 | Patrick McCoy | 08/06/2022 | \$110.00 | Standard | Unpaid | No | |

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Step 7: Add the email address you want to have the proof of payment to go to.

Note: The payment portal will be updated with the invoice total from the consolidated invoice if you click on the correct link.

Payment Portal

Invoice Details

Invoice Number: Invoice Total:

Email Address:

Additional Recipients Email:

NOTE: To issue a receipt to multiple email addresses separate with ','

Card Details

Credit card surcharges apply: Visa/Master Card 1.3%, American Express 2.25%

Please note that due to security restrictions only 5 payments can be made using a credit card within the duration of 24 hours.

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.