Document Services Online Customer Guide

Logging in

Video Available at http://www.documentservices.dla.mil/dso/Customer-LoggingIn/Customer-LoggingIn.mp4

- Point your web browser to https://www.dso.documentservices.dla.mil and on the right-hand side are registration and login options.
- To log in manually, input your user name and password, then click **login**.
- To log in using your CAC card, click **Login using CAC card** and follow the steps required. Your CAC card will not work until you log in the first time and associate your CAC card with your User Name under My Account.
- If you need to reset your password, or register for the first time, click the appropriate link and you will be guided through the process.
- If you need help at any point, you can click the Help link or call 877-DAPS-CAN.

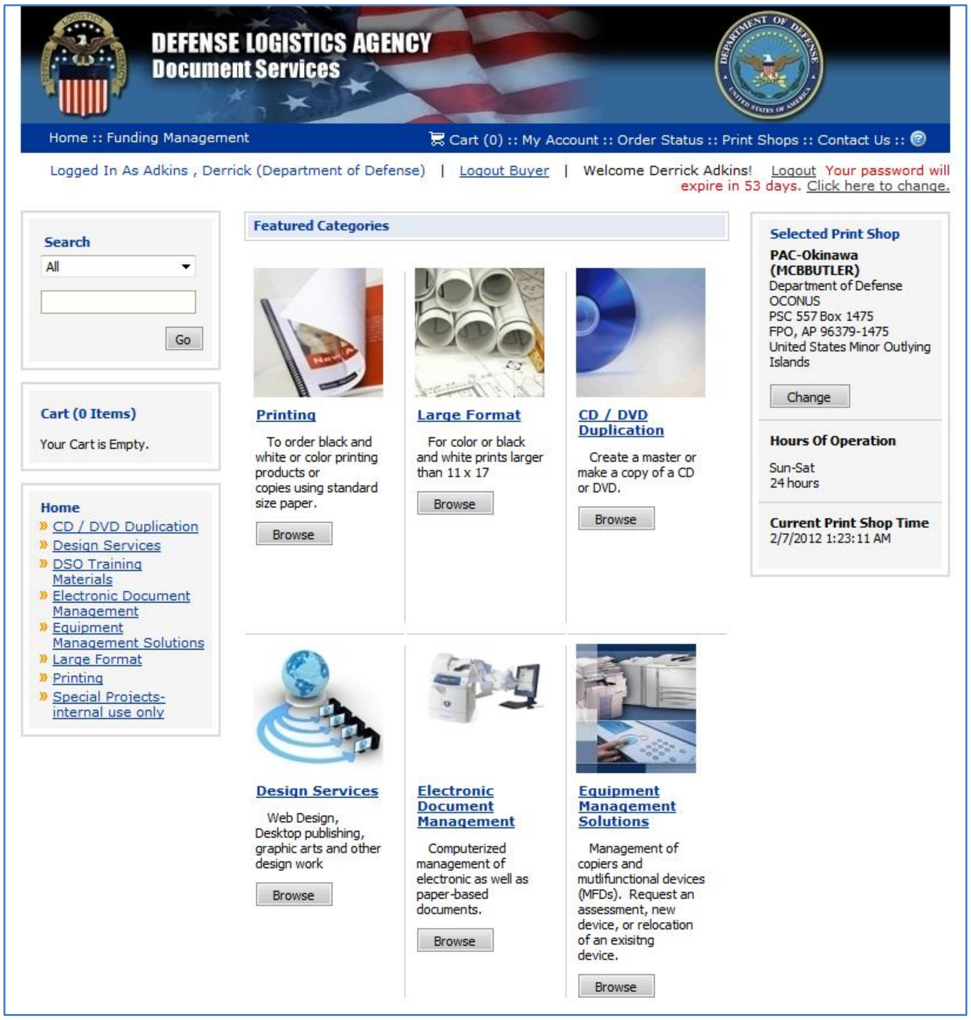
Registering an Account

Video Available at http://www.documentservices.dla.mil/dso/Customer-RegisteringAnAccount/Customer-RegisteringAnAccountweb.mp4

- Point your web browser to https://www.dso.documentservices.dla.mil
- On the right-hand side click ***Register***, input your account information in all required fields.
- In the Search ***DODAAC*** field type all or part of your activity, press the ***Enter*** key and wait for a moment, the list will appear under ***Search Results***.
- Click your name in the ***Search Results*** field and wait for a moment, the ***DODAAC*** and ***EBS Customer ID*** will be filled in automatically
- Your password must contain two uppercase and two lowercase letters, two numbers and two special characters
- Once your profile information is input you will be prompted to select your default print location.
- Click ***Register*** and you will receive an email notification about your account.
  NOTE: If you need access to special areas of DSO an Administrator will need to add your user account to the appropriate groups. You may not be able to see special catalogs, payment methods, production functions or software features immediately. Newly registered users may only place basic orders.

Navigating DSO

Video Available at http://www.documentservices.dla.mil/dso/Customer-NavigatingDSO/Customer-NavigatingDSO.mp4



- Once logged in, you will see your main starting page. What you will see may be different depending on your log in information – DSO will display different “storefronts” to different users.
- In the menu bar below the banner you can access your ***My Account*** page or look up ***Order History***.
- In the Featured Category section you can place a variety of orders, most commonly ***Printing*** orders.
- On the left we can see our ***Shopping Cart***, and we see similar ordering options as the main area, without the pictures. If you have a special ***Catalog*** available to you or your work group it will display in this list as well.
- On the right we see ***Print Shop*** information, including the phone number to call if there are questions about your order.

Basic Orders

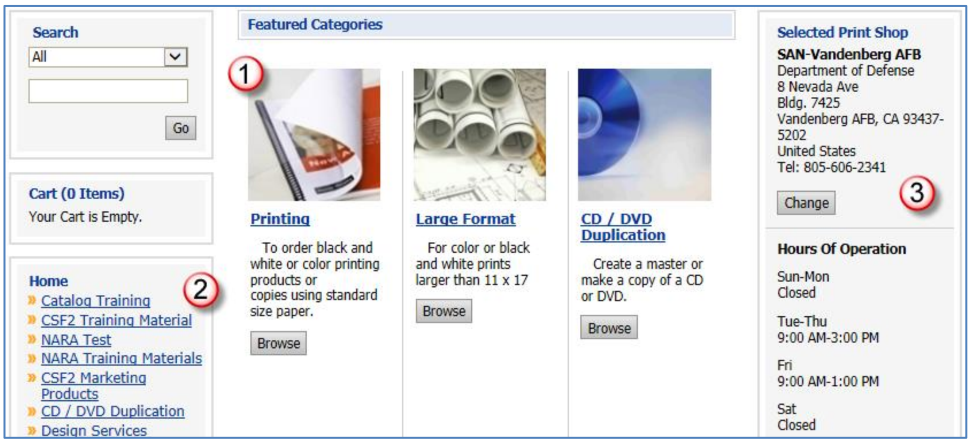
Video Available at http://www.documentservices.dla.mil/dso/Customer-PlacingAnOrderBasicOverview/Customer-PlacingAnOrderBasicOverview.mp4

- From the ***Home*** screen you have a number of ordering options. From any page you can click the ***Home*** button to return to the Home page.
- If you have an order that you left partially completed you will see it in your ***Cart*** on the left. You can find jobs you saved in the ***My Account*** section under ***Saved Jobs***.
- You can browse each Featured Category for more detailed information about our products and services.

Each product will be a single Job in the shopping cart, and when you proceed to checkout, all Jobs in the cart will be part of the same Order. Each product category has its own unique options, and if you don't see the product you are looking for you can always use the Special Instructions to describe the Job. What follows is a sample order with descriptions of various features available during the order placement process.

Getting Started

Video Available at http://www.documentservices.dla.mil/dso/Customer-Printing-GettingStarted/Customer-Printing-GettingStarted.mp4

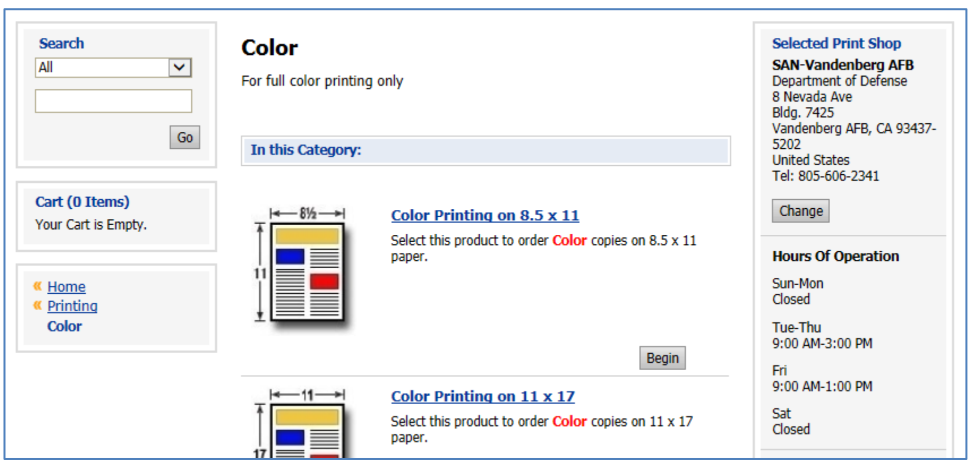


1) Select the category that best describes your job.
2) Optionally, you can select the category from the list, or select any catalog items that are unique to you.
3) You can change your selected print shop or view contact information at many steps in the ordering process.

Clicking on a category will have different results depending on how the category is configured. Each category has clear descriptions of the types of products and services available within it. In our example we will click the **Browse** button on the Printing category, which takes us to a page with a list of options.

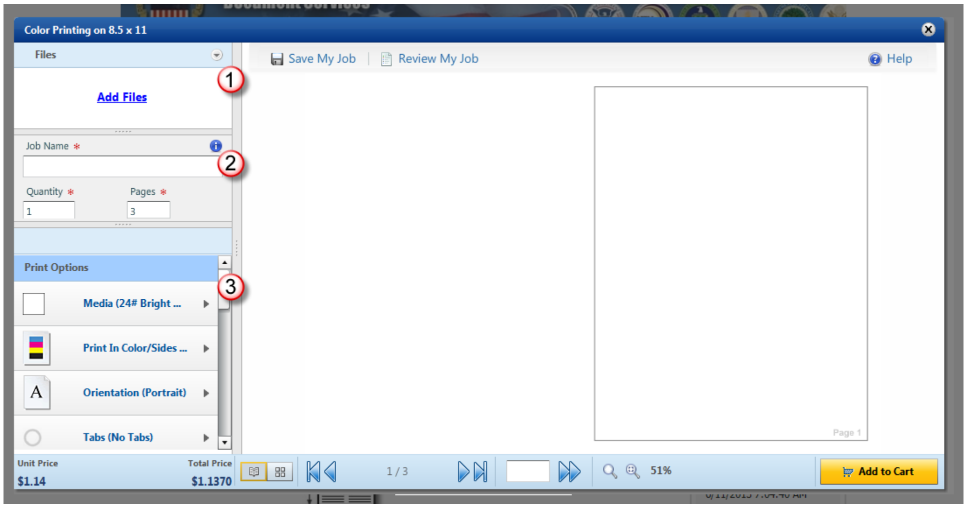
1) Select the option that best describes your job.
2) You can see other items in your cart and navigate back to browse other options.

Clicking the **Browse** button on the Color option prompts us to select a page size. Each section is configured to display options that are specific to that category.

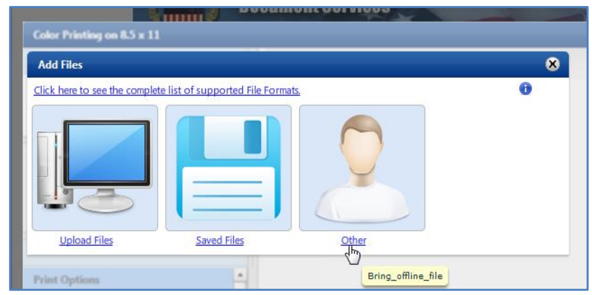


Click the **Begin** button to input specific print options for this job.

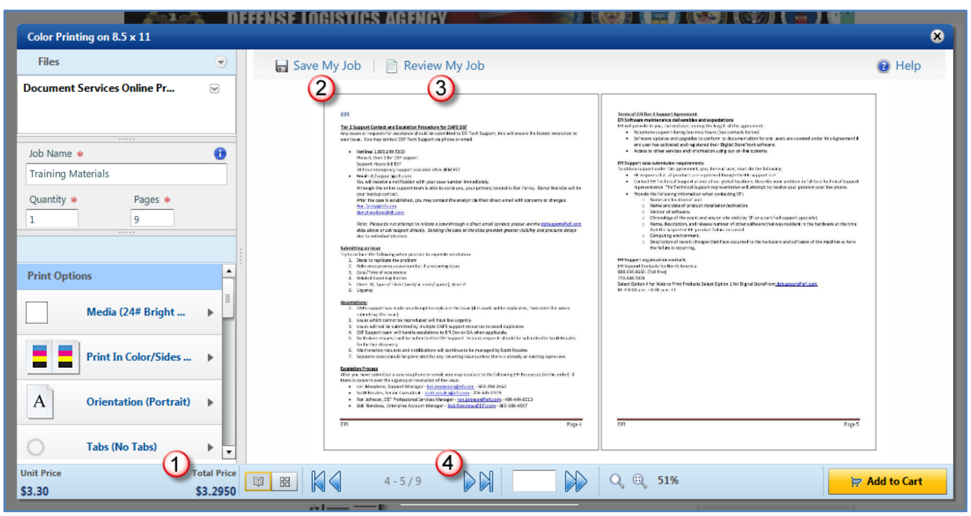
Attaching Files & Print Options



1) You can **Add Files** of any kind or describe offline materials to be produced.
2) The **Job Name** allows for a description of the Job being placed. You can change the **Quantity** to designate how many copies you need, while the **Pages** will be automatically added up based on the files you added to the Job.
3) Select all **Print Options** required for your order. Print Options will vary depending on the type of job you are placing. If you do not see something you need, you can add Special Instructions, located at the bottom of the Print Options list.

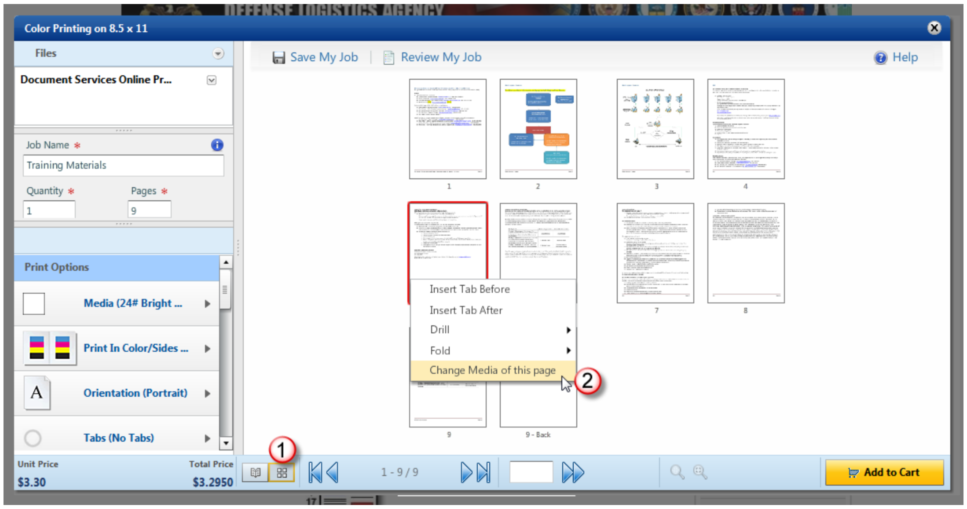


The "Other" option allows the user to designate offline material for any documents that are not digital.



1) Updating **Print Options** will change the estimated job cost automatically.
2) The **Save My Job** button will remove the job from your cart and move it to the My Saved Jobs section of the My Account page, so you can resume the order at a later time.
3) The **Review My Job** button will show a list of all print options selected so far.
4) You can page through your job using the preview pane. Clicking the **Add to Cart** button will prompt you to approve the job and add it to your shopping cart.

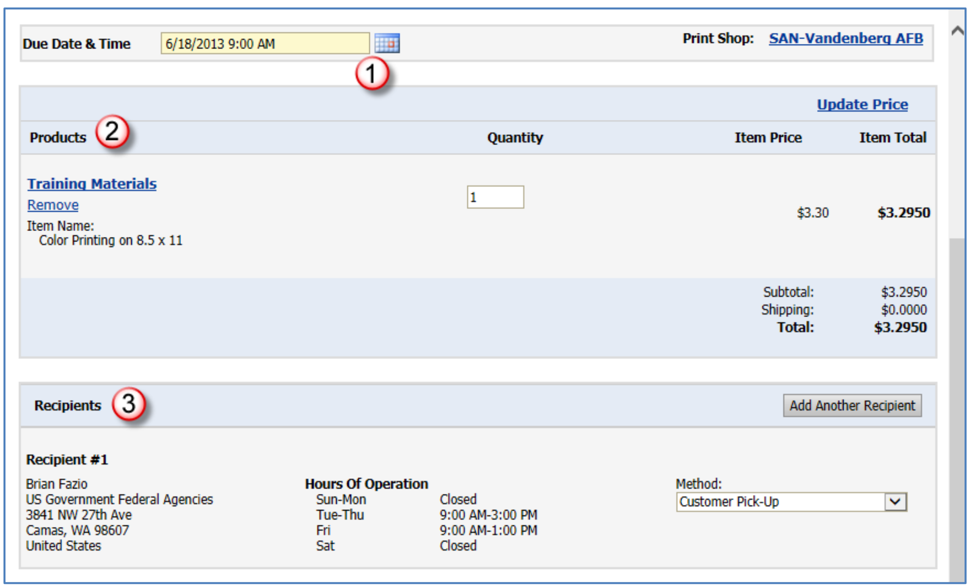
Advanced Print Options - Thumbnail View



1) Clicking the **Thumbnail View** button allows us to see more pages of our document at once.
2) Clicking on a page of the document will display additional print options. This may include options such as adding tabs, changing the paper color of a single page, or other options depending on the type of order you are placing.

Order Shopping Cart

Video Available at http://www.documentservices.dla.mil/dso/Customer-PlacingAnOrderShoppingCart/Customer-PlacingAnOrderShoppingCart.mp4

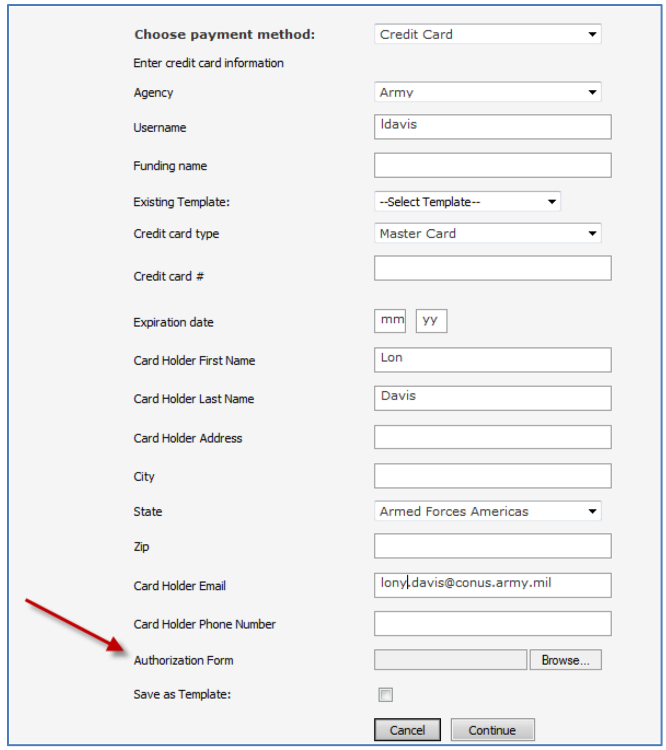


1) The next step when placing an order is setting your Order Due Date and Recipients. Click on the ***Calendar*** icon to select the Date and Time you would like to receive your Order. Click ***Save*** when done.
2) Review Products to verify your Order. If you would like to remove Products from this Order you can click the ***Remove*** link. If you would like to add more products to this Order you can click the ***Continue Shopping*** button, which will return you to the Home screen to begin the process of adding a new job to the order.
3) The user who is logged in is the default recipient. Selecting anything besides ***Customer Pick-up*** from the Delivery Method drop-down will allow you to change recipient information and save new recipients to your Address Book. The **Add Another Recipient** button will allow you to ship to more than one person.

Click ***Checkout*** to finalize your order and select your payment method, then click ***Next*** on the first Payment screen to be presented with the ***Choose Payment Method*** drop-down menu.

Attaching Funding

Credit Card



- Selecting ***Credit Card*** from the ***Choose Payment Method*** drop-down menu presents the user with a place to input new credit card information.
- The Funding Name field will be displayed for this credit card transaction on the customer statement.
- Checking the ***Save as Template*** box will allow you to create a template that will show up in your ***Select Template*** drop-down menu for future use when placing orders.
- Checking the ***Shared Template*** box allows you to browse for people to share this funding option with, and adding them will give them the ability to use this payment method.
- Clicking the ***Continue*** button will take you to the Order Confirmation screen, which summarizes your order and sends you an email notifying you that your order was successfully received.
- Click ***Browse*** next to the ***Authorization Form*** field to find the authorization form on your computer and upload.

Line of Accounting

Video Available at http://www.documentservices.dla.mil/dso/Customer-FundingLineOfAccounting/Customer-FundingLineOfAccounting.mp4

- Selecting ***Line of Accounting*** from the ***Choose Payment Method*** drop-down menu allows you to add a new one time or open funding document. If you already have an open funding document you can select it by choosing the ***Existing Template*** option.
- Verify your Agency and User Name are accurate, and input the name of your funding document.
- Click the Browse button to find the funding document on your computer and attach it.
- Checking the ***Open Funding*** box will allow you to create an ***Existing Template*** for future use when placing orders.
- Checking the ***Shared Template*** box allows you to browse for people to share this funding option with, and adding them will give them the ability to use this payment method.
- Clicking the ***Continue*** button will take you to the Order Confirmation screen, which summarizes your order and sends you an email notifying you that your order was successfully received.

Existing Template

- The ***Existing Funding Template*** in the ***Choose Payment Method*** drop-down menu presents the user with a list of available saved payment methods for them to select. Because these are existing funding templates, no further information is needed.

Order Confirmation

Clicking the ***Continue*** button will take you to the Order Confirmation screen. On this screen you can see your order number, a summary of your order and you will receive an email notifying you that your order was successfully received.

My Account

From any page in the customer view, clicking the **My Account** link in the menu bar will take you to your profile page and give you access to many options for your account.

- **Profile** contains your account profile information
- **Address Book** is for addresses you store in DSO for your convenience
- **Selected Print Shop** allows you to change your default print shop
- **Files** is an online location for you to save files that you use frequently
- **Saved Jobs** are jobs that have been removed from your shopping cart and can be used for future ordering

Order History & Receipts

- To view your ***Order History*** and ***Order Status***, log into DSO as you normally would.
- Click the ***Order Status*** link in the menu bar or click ***My Order History*** in the ***My Account*** section.
- This page displays all orders that have been placed, and you are able to narrow this list by adjusting the ***Time Period*** and ***Show Status*** drop-down menus.
- You can sort the list by selecting an option from the ***Sort By*** drop-down menu.
- For any order in the status of **Shipped** you can click the **View Detail** button to see your receipt.

Tip: There is no built-in function to search for a Job Name, but most web browsers have a built-in search option. In Microsoft Internet Explorer you can go to the ***Edit*** menu and select ***Find on This Page*** or hold down ***Ctrl-F***. Enter your search criteria and Microsoft Internet Explorer will highlight this word on the page anywhere it appears.

Adding Your CAC Card to Your Account

Video Available at http://www.documentservices.dla.mil/dso/Customer-AddingYourCACCard/Customer-AddingYourCACCard.mp4

- To add your CAC card to your account, log in manually using your user name and password.
- Click the ***My Account*** link in the menu bar, and click ***Register CAC Card***.
- You will be prompted to pick your email certificate profile from the list of available certificates, so you may see certificates for others who have used their CAC card on the computer you are using. When you select yours the system will compare it to the CAC card inserted into the computer, and log you into the system.

Find Order

- To find an order, log into DSO as you normally would.
- Click the ***My Account*** link in the menu bar and from the My Account page click ***Find Order***.
- From here you have the option of searching based on a date range, Sales ID, DSO Order ID or Funding Document Name. Input your search criteria and click the ***Find Order*** button.

Download Order History as an Excel File

Go to ***My Account***, click ***Find Order***. Search for desired order(s) and you will see the ***Download an Excel File*** button at the top of the list of order(s) found.

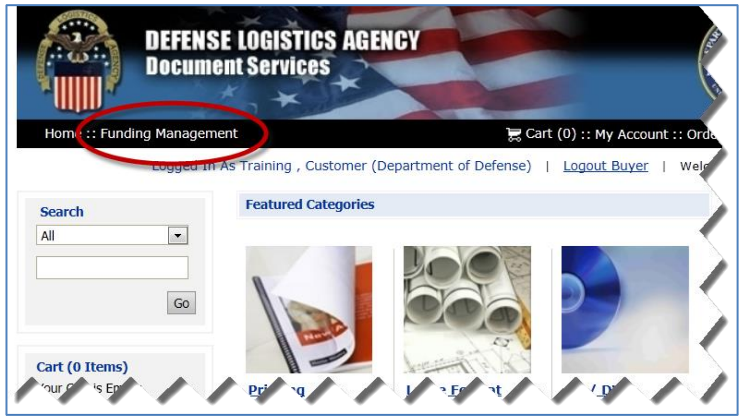
Customer Funding Management

Video Available at http://www.documentservices.dla.mil/dso/Customer-FundingManagementBasics/Customer-FundingManagementBasics.mp4

The ***Funding Management*** module allows the customer the ability to review and adjust payment options without having to place an order. The Funding Management module allows you to:

- Create, view and edit Line of Accounting funding
- Create, view and edit Credit Card Templates

To access, click the Funding Management link in the upper left-hand corner.



Video Available at
http://www.documentservices.dla.mil/dso/Customer-FundingManagementAddingPaymentMethod/Customer-FundingManagementAddingPaymentMethod.mp4

- Click the ***Create New Funding*** or ***Create New Credit Card Template*** button to add a new payment option
- The ***Recent*** tab displays recently used funding documents, with the most recently used at the top of the list
- The ***Rejected*** tab displays funding documents that have been rejected due to an error
- The ***Waiting*** tab displays funding documents that are being electronically processed. Funding documents should automatically clear from this list, and nothing should be listed under this tab for more than five minutes.
- The ***Not Complete*** tab displays funding documents that DLA Document Services need to update based on the funding document attached when the funding was established
- The ***Search*** tab allows you to search your open funding or credit card templates
- The ***Credit Card Templates*** tab displays any credit card templates you have saved

Create New Line of Accounting Funding

Using the Funding Management module to create a funding document is the same as adding line of accounting funding during the ordering process:

1) Click ***Create New Funding***
2) Verify your Agency and User Name are accurate, and input the name of your funding document.
3) Click the Browse button to find the funding document on your computer and attach it.
   a. Checking the ***Open Funding*** box will allow you to create a template for future use when placing orders.
   b. Checking the ***Shared Template*** box allows you to browse for people to share this funding option with, and adding them will give them the ability to use (but not edit) this payment method.

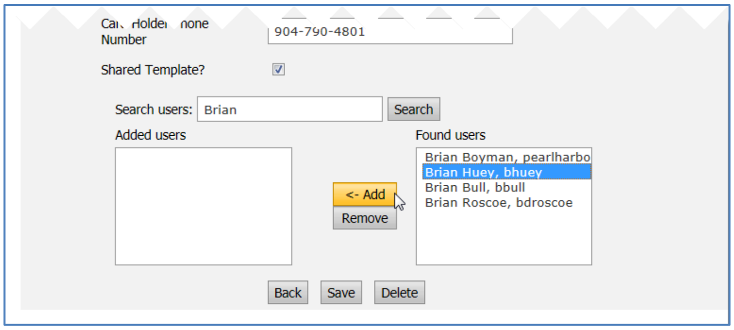
Create New Credit Card Template

To create a new credit card template:

1) Click Create Credit Card Template
2) Name your Template (i.e. "Training Credit Card") and complete the credit card information
   a. Checking the ***Shared Template*** box allows you to browse for people to share this funding option with, and adding them will give them the ability to use (but not edit) this payment method.

Sharing Funding Documents

Clicking the Shared Template box for credit cards or line of accounting funding allows the user to share the payment method with other DSO users.

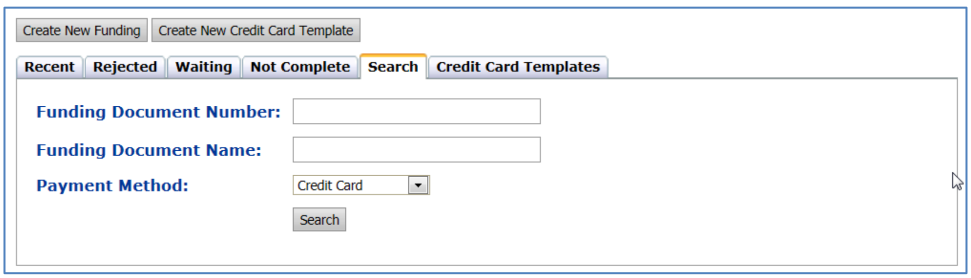


- To find DSO users to share this payment method with, type all or some of the user name and click ***Search***.
- Click the name of the user you wish to add, and click the ***Add*** button. The user will now be listed on the left under ***Added Users***. This will give the user the ability to use this payment method when they place an order.
- To remove a user from this payment method, highlight their name in the Added Users box and click ***Remove***.

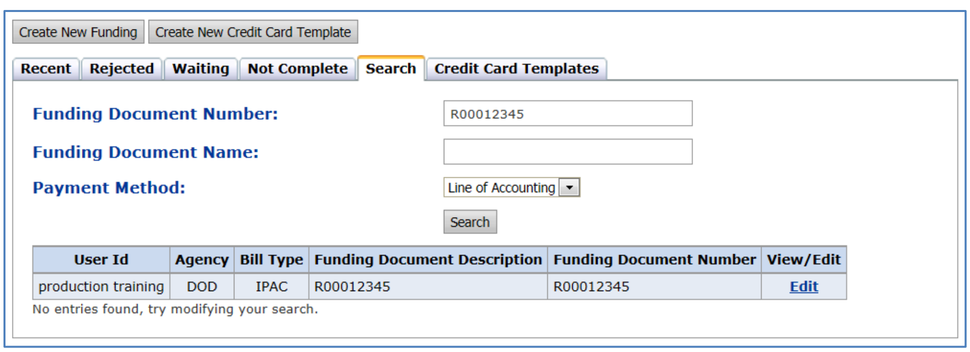
Search for Existing Funding Documents

Video Available at

http://www.documentservices.dla.mil/dso/Customer-FundingManagementSearchandEdit/Customer-FundingManagementSearchandEdit.mp4



The easiest way to locate existing funding documents is to click on the ***Search*** tab and enter your search criteria. The Search tab allows you to search your open funding or credit card templates. You can input your search criteria, select your Payment Method and click the Search button. You can also leave the fields blank when searching to view all Credit Card or Line of Accounting payment methods, depending on the drop-down menu selection. Once your search results are displayed you can click the Edit link to the right to view details and edit.



- The ***Recent*** tab displays recently used funding documents, with the most recently used at the top of the list
- The ***Rejected*** tab displays funding documents that have been rejected due to an error.
- The ***Waiting*** tab displays funding documents that are being electronically processed. Funding documents should automatically clear from this list, and nothing should be listed under this tab for more than five minutes.
- The ***Not Complete*** tab displays funding documents that are missing information.

Viewing and Editing Existing Funding

Clicking on the ***Edit*** link to the right of the funding document gives you access to the details. From there you will be able to make changes as needed.

User Id	Agency	Bill Type	Funding Document Description	Funding Document Number	View/Edit
production training	DOD	IPAC	R00012345	R00012345	Edit

When you click ***Edit*** to the right of a Line of Accounting funding document, you have the ability to add funding to an existing document, or segment that funding using ACRN codes. To add funds, simply enter the amount you would like to add in the Add Funds field.

Funding History

The ***Funding History*** shows a list of all orders which used that funding document as the payment method, including orders placed by any users who have shared access to the funding document.

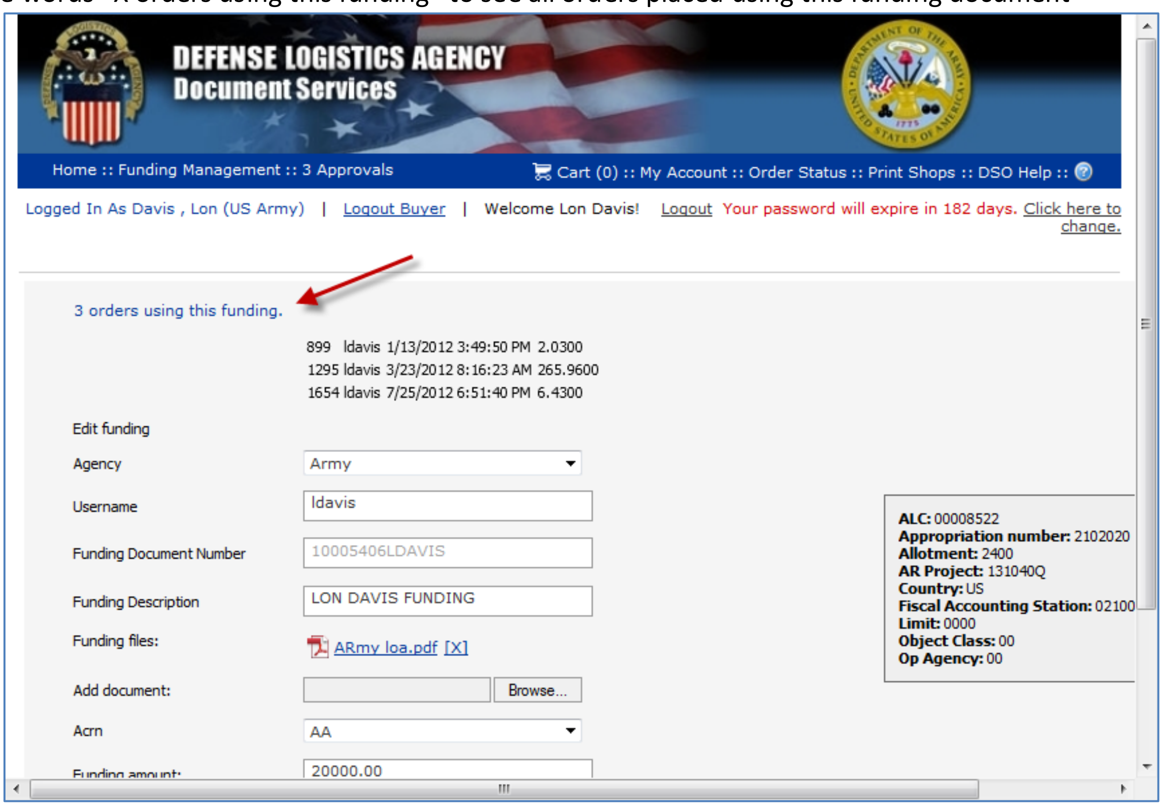
Step-by-Step: Accessing Funding History

To establish the ***Approval*** process for an existing funding document:

1) Click ***Funding Management***

2) Locate the funding document and click the ***Edit*** link

3) Click the words "X orders using this funding" to see all orders placed using this funding document



Funding Approval

Funding Approval is the ability for a customer to share funding with another customer, but require approval after the final order is submitted. The funding document owner can establish an approval process for any of their credit card templates or open funding documents. When the funding document requiring approval is used by anyone who it has been shared with, the funding document owner will get an email prompting them to log into DSO and approve the use of the funding document. From the perspective of the customer using the funding document that requires approval, the process will be the same, but at the Order Confirmation screen the Order Status will say ***Funding Requires Approval***.

Orders placed that require approval will still appear in the Order View and Operator View. The Order status will be ***Approval Required,*** even though the Operator View status is ***User Approved***.

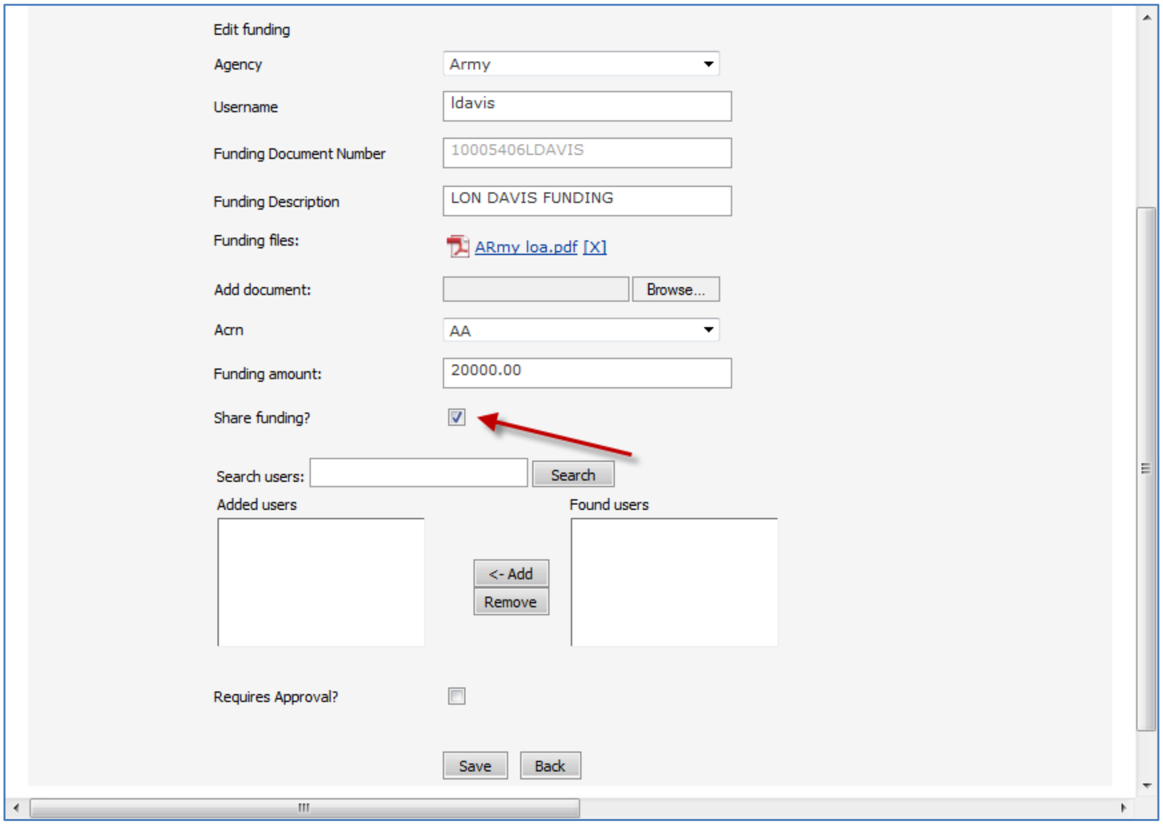
Step-by-Step: Setting up Approvals for an existing funding document

To establish the ***Approval*** process for an existing funding document:

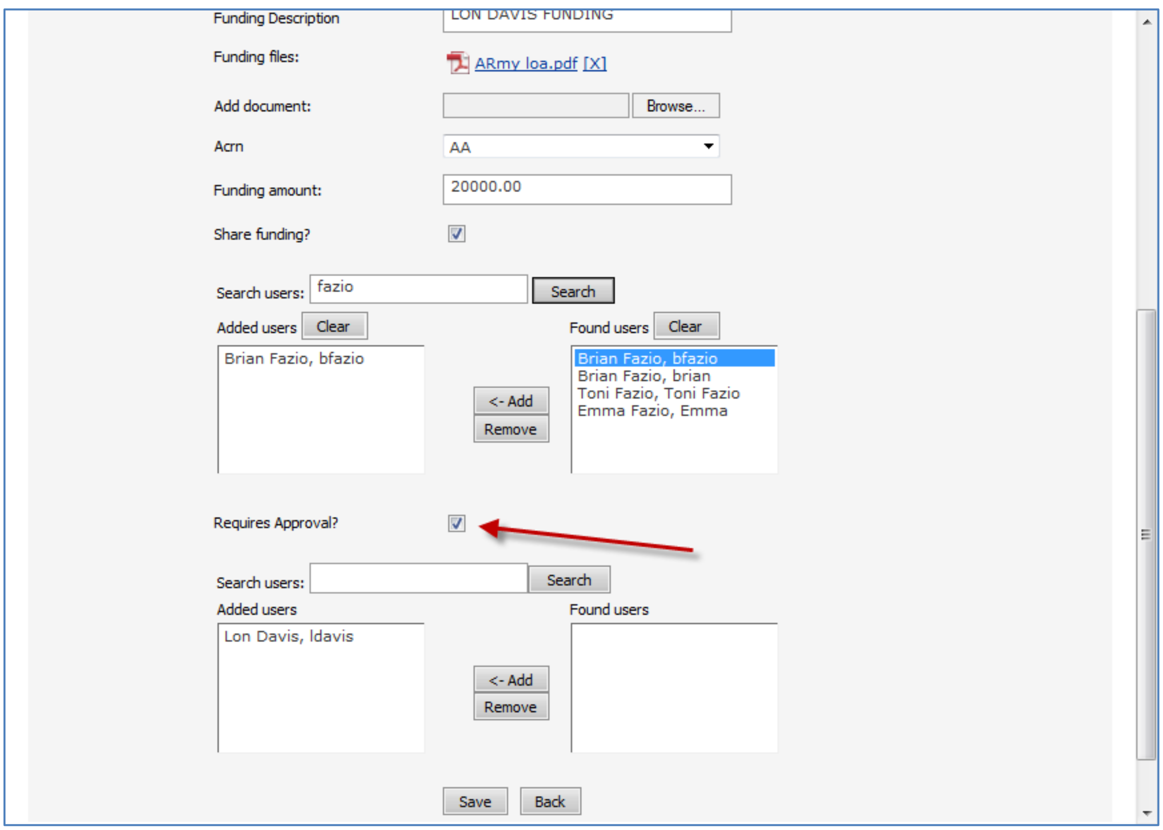
1) Click ***Funding Management***

2) Locate the funding document and click the ***Edit*** link

3) Check the ***Share Funding*** box and select users to share with



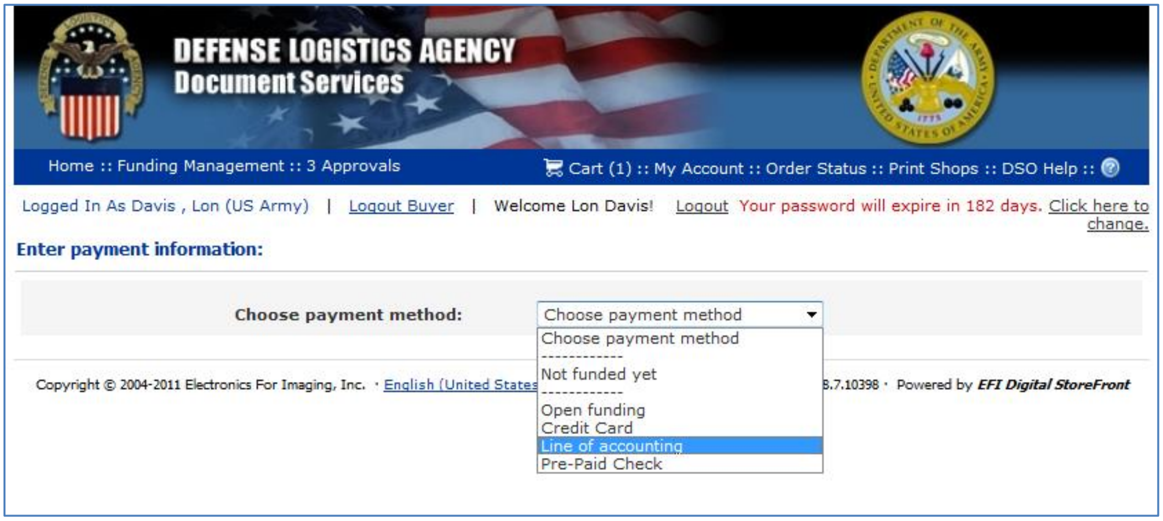
4) Check the ***Requires Approval*** box – funding document owner is automatically added to the list, add or remove users as needed



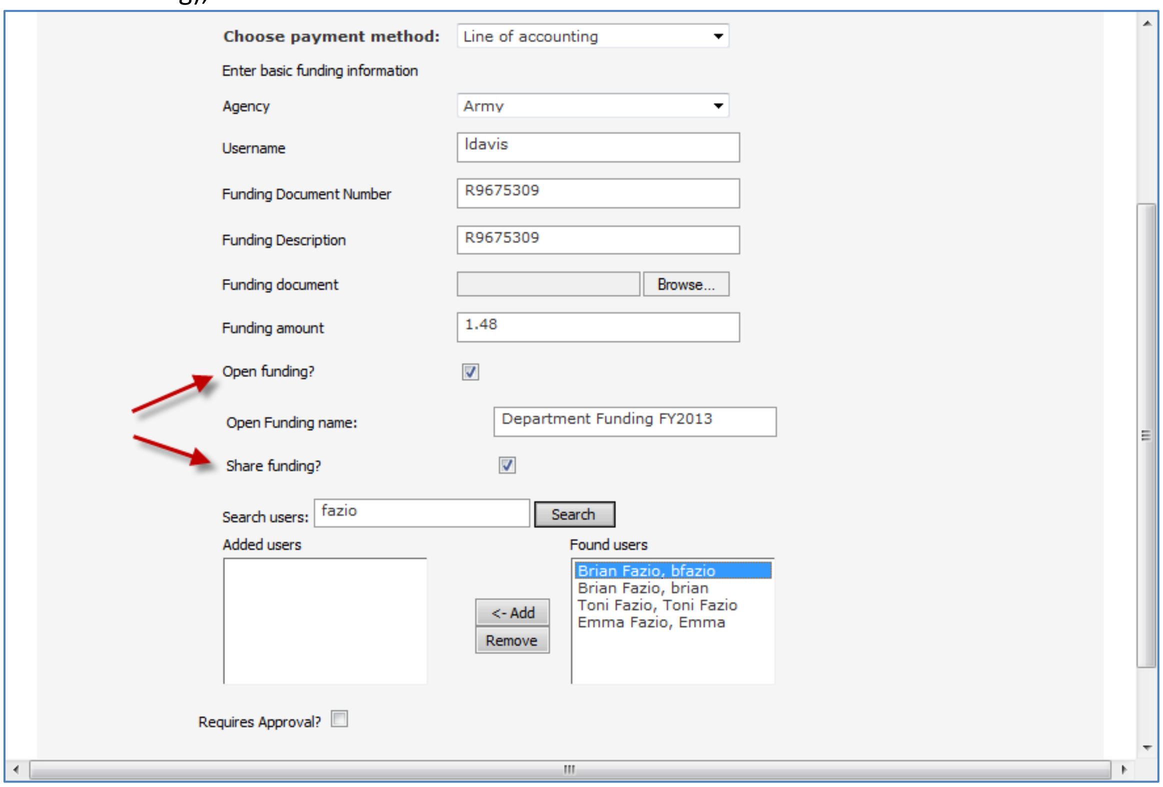
Step-by-Step: Setting up Approvals for a new funding document

To establish the ***Approval*** process for a new funding document, created while placing an order:

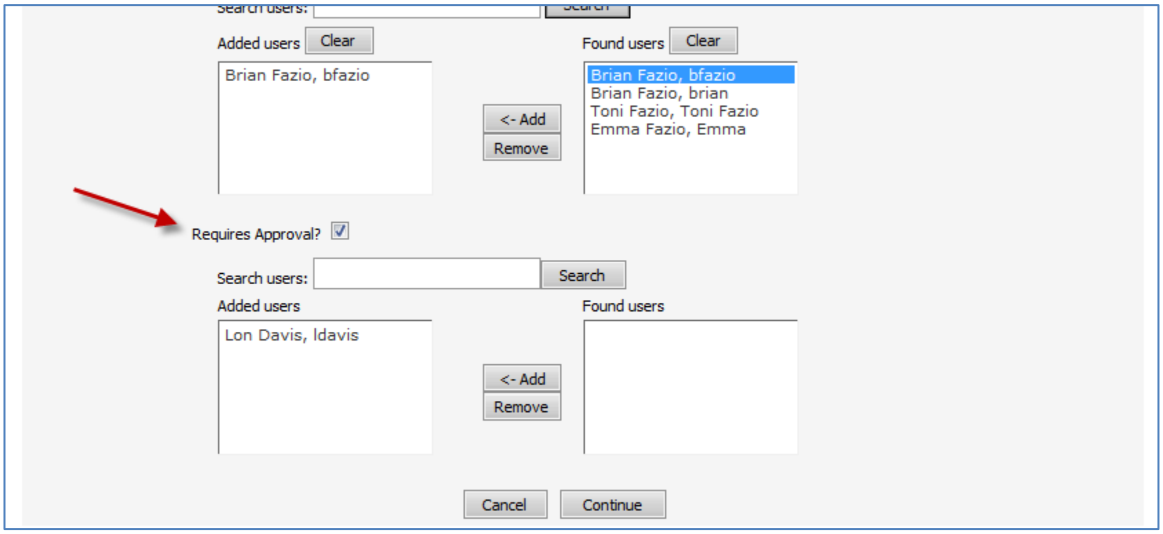
1) Place the order and select payment method (Credit Card, create template or Line of Accounting, open funding document)



2) Check the ***Shared Template*** box (credit card), or check the ***Open Funding*** box and the ***Share Funding*** box (Line of Accounting), then select users to share with.



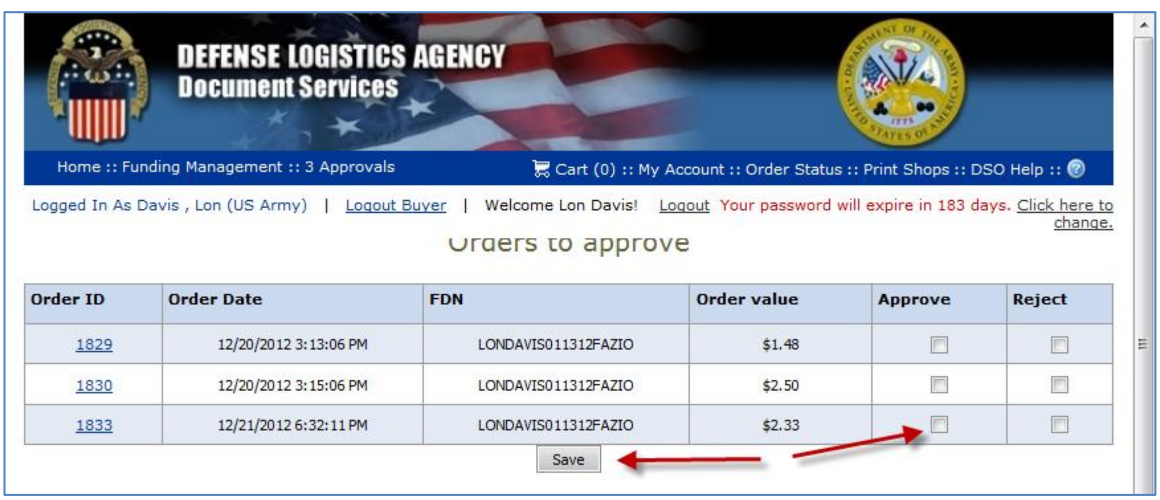
3) Check the ***Requires Approval*** box – the funding document owner is automatically added to the list, add or remove users as needed. Click ***Continue*** when done.



Step-by-Step: Approving an Order

1) In the top menu click the ***Approvals*** link,

2) Hover over the Order Number to see basic order information. Check the ***Approve*** box and click the ***Save*** button to approve an order, check the ***Reject*** box, input reason and click the ***Save*** button to reject an order.



Approval History

The ***Approval History*** information allows you to see historical information about approved orders. This information is on the same page as your ***Orders to Approve***. Remember, you will only see the ***Approvals*** link if you have funding documents that require an approval.

- In the top menu click the ***Approvals*** link

- In the ***Approval History*** section., lines in blue were approved, lines in red were rejected. You may click the ***Remove*** link to permanently remove an order from the history.