Document Services Online Customer Guide

Updated February 14th, 2012

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DSO Basics

Logging in

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

- Point your web browser to https://www.dso.documentservices.dla.mil
- On the right-hand side are your 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 always click the Help link on the right-hand side of the login screen, or call 877-DAPS-CAN.

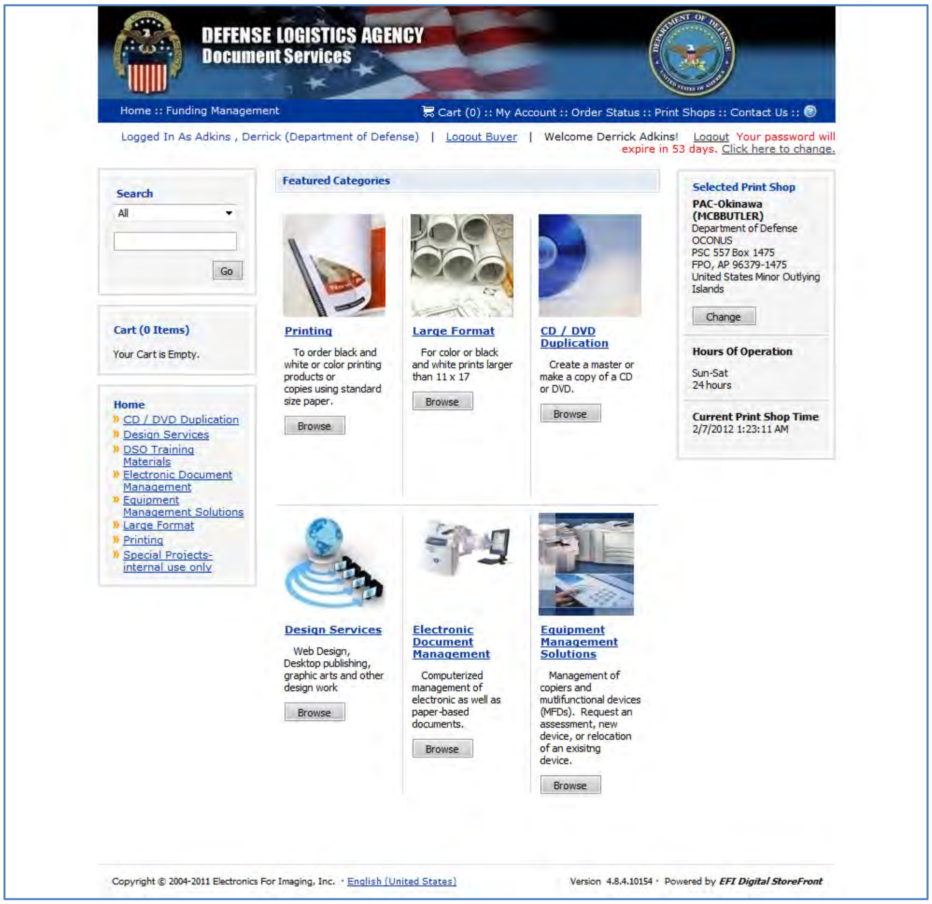
Registering an Account

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

- 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.html



- 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.

My Account

Adding Your CAC Card to Your Account

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

- 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.

Order History & Status

- To view your ***Order History*** and ***Order Status***, log into DSO as you normally would.
- Click the ***Status*** link in the black menu bar, or if you are already in the ***My Account*** section you can click ***Order History & Status***.
- 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.
- 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.

Find Order

- To find an order, log into DSO as you normally would.
- Click the ***My Account*** link in the black 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.

Placing an Order

Basic Overview

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

- 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***.
- The ***Printing*** category is designed for uploading your own files for standard sized color or black and white copy orders.
- You can browse each Featured Category for more detailed information about our products and services.

Printing

Getting Started

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

- When placing a ***Printing*** order you begin by making a few selections about your order, allowing DSO to display only options that you might need for your specific print product.
- Note that if you begin by selecting Color and 8.5x11 sized paper but later decide your order should be black and white, you will have to return to the beginning of the ordering process to change your order.

Attaching Your Files

Video Available at http://www.documentservices.dla.mil/dso/Customer-PlacingAnOrderAttachingYourFiles/Customer-PlacingAnOrderAttachingYourFiles.html

- The next step when placing a ***Printing*** order is naming your job and attaching your files. Input your Job Name and Quantity desired at the top of the page.
- When selecting a file or multiple files for your order you have three options, upload a file, use a saved file, or indicate you will bring in hardcopy, or offline material.

- To upload a file, click the ***Browse*** button and locate your file. Click ***Upload File*** to add the file to this job, and it will be uploaded, converted to a PDF and added to the job. Don't worry, we will send the original file too if your file was not originally a PDF file.
- If you have previously saved files they will appear in the ***My Saved Files*** list, and you can add them by clicking the file and clicking ***Add File***.
- If you would like to indicate offline material that you will deliver to the print shop, you can click the ***Offline Material*** tab. Indicate what you are bringing in, the name of the file and how many pages, if known. Be aware that DSO will attempt to calculate a price based on the information you put for number of pages, but your print shop staff have the ability to adjust if the actual page count is different when the job is completed.
- When you have added all of the files associated with this job click ***Next*** to make your print selections.

Print Options

Video Available at http://www.documentservices.dla.mil/dso/Customer-PlacingAnOrderPrintOptions/Customer-PlacingAnOrderPrintOptions.html

- The next step when placing a ***Printing*** order is selecting your print options.
- Some of your options may be pre-selected based on the type of printing order you have selected so far.
- Make your Print and Finishing selections from the drop-down menus.
- Clicking Update Price will adjust the price based on your selections.
- If you have other information about this job, include it under Special Instructions. Note that DSO cannot estimate a price for anything typed in the Special Instructions field.
- When you have made all of your print selections click ***Next*** to review your job.

Job Review

Video Available at http://www.documentservices.dla.mil/dso/Customer-PlacingAnOrderReviewJob/Customer-PlacingAnOrderReviewJob.html

- The next step when placing a ***Printing*** order is reviewing your job.
- The Job Review page displays a preview of files you have uploaded, and lists your print specifications. You can page through your document to see what it will look like as a finished product.
- Scrolling down, you can review your print options, and check the ***I Approve*** checkbox to proceed.
- Click ***Add to Cart*** to set the shipment and payment method for this job.

Order Shopping Cart

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

- The next step when placing a ***Printing*** 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.
- 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 ordering process.
- 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, add recipients, and save new recipients to your Address Book.
- Click ***Checkout*** to finalize your order and select your payment method, then click ***Next*** on the first Payment screen to be presented with your ***Choose Payment Method*** drop-down menu.

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 Credit Card payment method only has a few custom areas.
- Verify your Agency and User Name are accurate, and input a name for this credit card in the Funding Name field.
- 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.

Line of Accounting

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

- 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.
- 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.

Funding Management

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.

- 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 Funding (Line of Accounting)

Using the Funding Management module to create a funding document follows the same steps that are used 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.

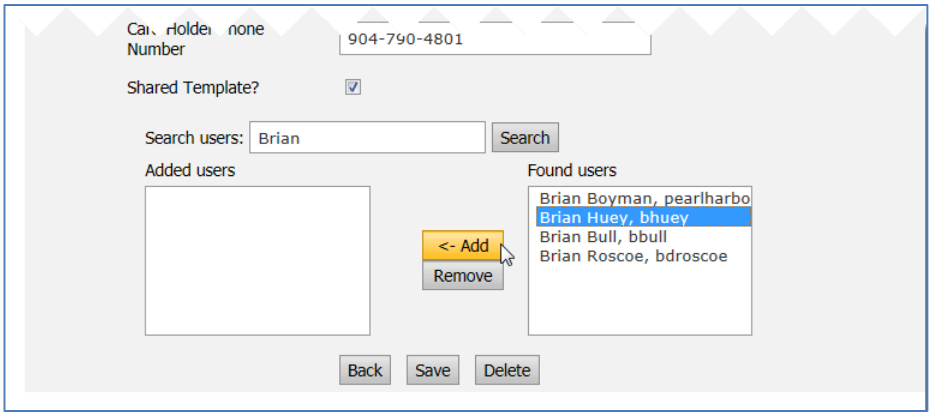
Create New Credit Card Template

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

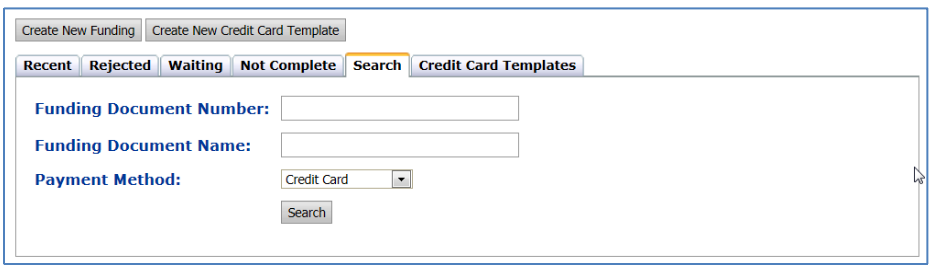
Clicking the Shared Template box for credit cards or line of accounting funding allows the user to share the payment method with other DSO users.



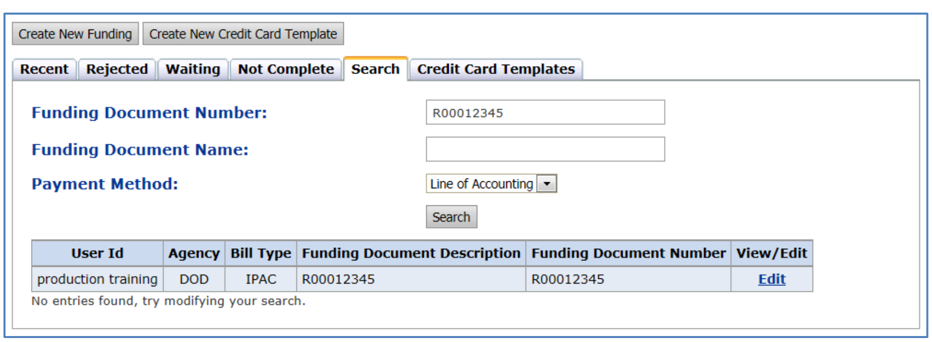
- To find DSO users to share this payment method with, type all or some of the user name and click ***Search***.
- Click the name of the user you wish to add, and click the ***Add*** button. The user will now be listed on the left under ***Added Users***. This will give the user the ability to use this 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***.

Locating Existing Funding Documents

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. To add a new ACRN, click the ***Add New ACRN*** checkbox, type the dollar amount in the ***Amount for New ACRN*** field and click the Add button.