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|  | City of Salem |
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| Printshop User Guide |

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**1. Copiers Office**

**1.1 Viewing Copiers Office bills**

1.From the home page click either the “Go to Copiers Office” button or click “Copiers Office” on the navigation bar at the top.

2. By default the copiers office page will show the copiers office bills that were created in the past 24 hours. To search for copiers office billings within a certain date range, use the start date and end date selection in the middle of the page and click search.

3. If you would like to see every copiers office billings leave both the start date and end date empty and click “Search”. (This may temporarily slow down the page while it loads the records).

4. On the left-hand side of the chart, you may select the number of entries that display on the page. The default value is 10, but this can be changed to 25,50, or 100.

5. The search box on the right side of the page allows you to search for a specified record that falls within the selected date range and selected action type.

**1.2 Creating Copiers Office bills**

1. From the copiers office home page click the “Create New Copier Office Billing” button

2. Select the desired Project number from the project dropdown. With the dropdown selected you can either scroll down to find the project or start typing the project to find it easier.

3. After selecting the project the task dropdown will be filled with the appropriate tasks for that specific project.

4. The Cost Center will automatically be filled, so there’s no need to worry about that.

5. Enter the quantity and date for that bill and click “create” and your Copiers office bill will be made.

**2.** **Copy Center**

**2.1 Viewing Copy Center bills**

1.From the home page click either the “Go to Copy Center” button or click “Copy Center” on the navigation bar at the top.

2. By default the copy center page will show the copy center bills that were created in the past 24 hours. To search for copy center billings within a certain date range, use the start date and end date selection in the middle of the page and click search.

3. If you would like to see every copy center bill leave both the start date and end date empty and click “Search”. (This may temporarily slow down the page while it loads the records).

4. On the left-hand side of the chart, you may select the number of entries that display on the page. The default value is 10, but this can be changed to 25,50, or 100.

5. The search box on the right side of the page allows you to search for a specified record that falls within the selected date range and selected action type.

6. Next to each work order, you will see a blue “i”, which can be used to view the details of the work order, bill the work order, or rebill if you would like.

**2.2 Creating Copy Center bills**

1. From the copy center home page click the “Create New Copy Center Billing” button.

2. The Alias dropdown box is used to select the Department alias for this bill.

3. The account code can be chosen from the Account dropdown menu.

4. The form number box is a required field and must be filled in before adding items to the bill or submitting it.

5. Clicking on the “Dept” dropdown will allow you to choose the department that corresponds to the copy center bill you are creating.

6. The Project number dropdown allows you to choose from the available project numbers for the specific department you have selected.

7. The task number dropdown allows you to choose from the available task numbers for the specific project you have selected.

8. The Cost Center will automatically be filled, so there’s no need to worry about that.

9. Both the name and Phone fields are required, and you must fill them out before adding items to the bill or submitting it.

10. The Job name field is required, and you must fill it out before adding items to the bill or submitting it.

11. Above the items for this bill, there is a section where you can fill out special instructions for this bill, but this is not required.

12. To add an item to this bill first select the type of item from the dropdown, the size of the item, the item description, the number of copies you would like, the quantity, and the unit type. Then click add to add the item to the bill.

13. Under the items section you can then choose how many labor hours to charge for this bill.

14. Finally you can choose the drill size, staple, punch, print, and collate from their respective dropdowns. If you do not want any of these, then simply leave them blank. Then click the blue “create” button at the bottom.

**2.3 Billing Copy Center work orders**

1. From the copy center home page find the work order that you would like to bill and click the blue “i” to the right of it.

2. At the very top of the page you will see a blue button labeled “Bill Work Order”, click this and your work order will be billed.

**2.4 Rebilling Copy Center work orders**

1. From the copy center home page find the work order that you would like to rebill and click the blue “i” to the right of it.

2. At the very top of the page you will see a blue button labeled “Update Work Order”, click this and you will be taken to a page where you can update each field of the work order as well as delete items from the work order.

3. When you are finished updating the work order, click the blue button on the bottom of the page labeled “Update and rebill” and your work order will be rebilled.

**2.5 Admin update and deletion of Copy Center work orders**

1. From the copy center home page find the work order that you would like to rebill and click the blue “i” to the right of it.

2. Click the grey “Admin Update” button and you will be taken to a page where you can update each field of the work order as well as delete items from the work order.

3. At the bottom of the page there are buttons for updating the work order with the changes you made or delete the work order entirely.

**3. Mail Center**

**3.1 Viewing Mail Transactions**

1.From the home page click either the “Go to Mail Center” button or click “Mail Center” on the navigation bar at the top.

2. By default the mail center page will show the mail center transactions that were created in the past 24 hours. To search for mail center transactions within a certain date range, use the start date and end date selection in the middle of the page and click search.

3. If you would like to see every mail center transaction leave both the start date and end date empty and click “Search”. (This may temporarily slow down the page while it loads the records).

4. On the left-hand side of the chart, you may select the number of entries that display on the page. The default value is 10, but this can be changed to 25,50, or 100.

5. The search box on the right side of the page allows you to search for a specified record that falls within the selected date range and selected action type.

**3.2 Creating Mail Transactions**

1. From the mail center home page click the “Create New Mail Transaction” button

2. Select the desired Project number from the project dropdown. With the dropdown selected you can either scroll down to find the project or start typing the project to find it easier.

3. After selecting the project the task dropdown will be filled with the appropriate tasks for that specific project.

4. The Cost Center will automatically be filled, so there’s no need to worry about that.

5. Enter the cost for this transaction and the type of activity it is for and click the blue “create” button.

**3.3 Updating Mail Transactions**

1. From the mail center home page click the “Update Mail Meter” button.

2. On this page you will see what the mail meter is currently, a box to enter what amount you would like to adjust the meter by, and what the meter will be after your adjustment.

3. Entering a positive number will increase the mail meter and entering a negative number will decrease the mail meter.

4. Once you have adjusted the mail meter, click the “Update” button and the meter will be changed.

**4. Users (Admin Only)**

**4.1 Viewing Active Users**

1. From the home page click “Users” on the navigation bar at the top.

2. On the users page you will see a list of active users, their role, and an option to edit or delete the user.

**4.2 Creating New Users**

1. From the user’s page, click “Create New”.

2. Enter the username and select a role for the new user.

3. Click the blue “Create” button and the user will be added.

**4.3 Editing and Deleting Users**

1. From the user’s page, click either “edit” or “delete” next to the user.

2. On the edit page you can choose to either change the username or role, and then save your changes with the blue “save” button.

3. After clicking delete on a user, you will be taken to a confirmation page where you can click the red “delete” button to remove the user or click “back to list” to go back.