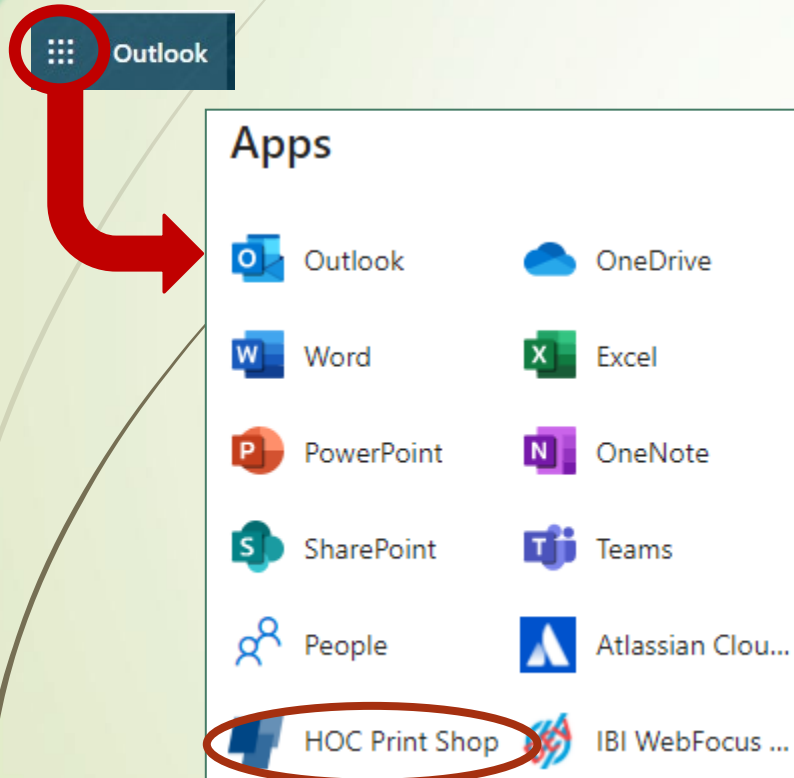# Let's start with logging in with Single Sign On

2

01 From your Outlook 365 page, select the application menu icon.

02 Next you will select the HOC Print Shop menu option.

After selecting the HOC Print Shop option from the Apps menu, one of three things will happen.
1. You will go directly into the application (Slide 3).
2. You will be asked for more information (Slide 4).
3. You may be refused access (Slide 5).

If you do not see HOC Print Shop in the Apps menu, click on the **All apps →** option at the end of the Apps list you do see. In the list that follows you will find it in the "Other" section. Once you select it, it should be in your initial listing.

You will go directly into the application

02

When you first log in to the HOC Print Shop application you will likely see a screen like the one below.

After selecting the HOC Print Shop option from the Apps menu, you will land on the HOC Print Shop home page.

01

If you do, pick the County Employees – Login/Register button next. You may be taken into the application (Step 2) or asked to give more information (Slide 4).
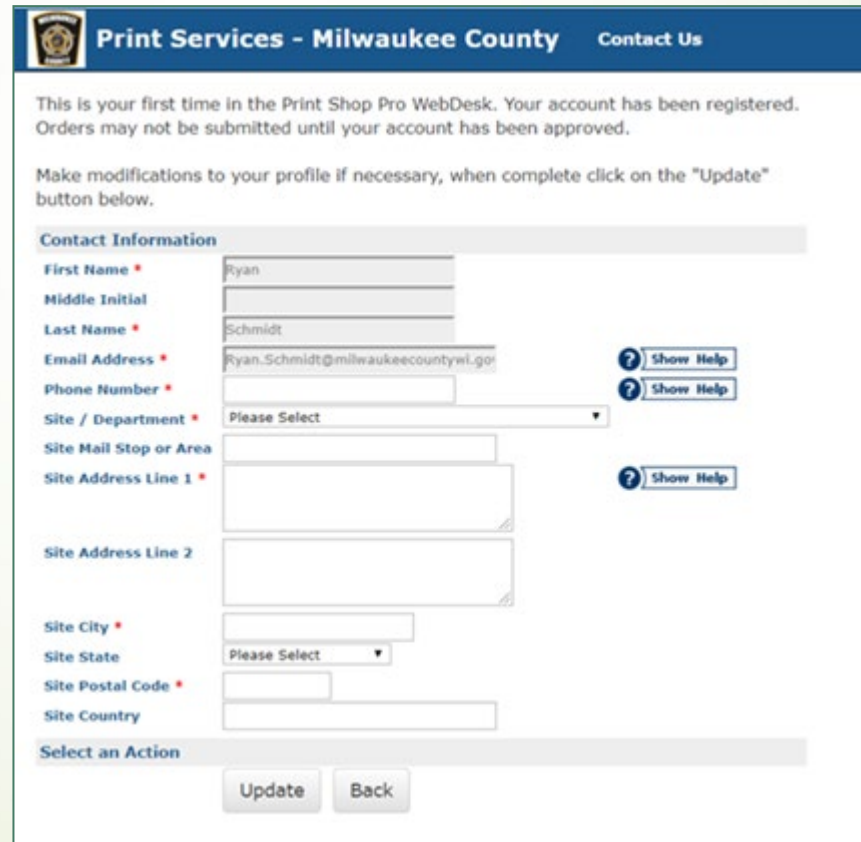
You will be asked for more information

01

If the screen below appears, you will need to provide the information marked with a *. Once you have, select the Update button. This will notify the Print Shop that a new user (you) want to be set up in the HOC Print Shop application. Someone from the Print Shop will check your request and either grant or deny access. Either way, you should get an email telling you have been set up, or not and why.

You may be refused access

If you cannot access the application, it is likely you have not been setup in Single Sign On. If that is the case, the following steps will get you access and then you can start over at Slide 2.

01 Create an email to the HOC Print Shop to printshop@milwaukeecoutywi.onmicrossoft.com.

02 In the email include your first name, last name and email address.

03 Send the email and wait a response. You will be notified when your Single Sign On access has been set up by IMSD.

The screen below represents the HOC Print Shop home page/services. You will see it once you have been setup in the system and logged in for the first time.

Manual Guide

Quick Copy "Button"

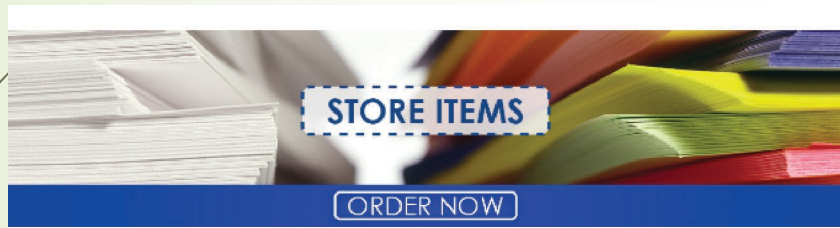Print Services "Button"

Business Cards "Button" & Envelopes "Button"

Store Items "Button"

7

What are Store Items? Quite simply, types of orders that a department will request often. The list of order types is built based on history and subject to change.

The intent of Store Items is to make ordering repetitive items easier.

01 To use Store Items, select the "Order Now" button from the Home Page.

Featured Categories

Child Support

County Board of Supervisors

County Clerk

County Executive

District Attorney

House of Correction

PARKS Dept.

Milwaukee County Sheriff's Office

All Categories

Child Support

County Board of Supervisors

County Clerk

County Executive

District Attorney

House of Correction

PARKS Dept.

Human Resources

Medical Examiner

02

Next, you will see a list of departments on the left side of the screen. The ones listed under Featured Categories are simply ones tend to use printing services more than others. You can find all the departments listed under All Categories.

Find the department you are ordering for and select that line.

STORE ITEMS - Shopping

03 Next you will see typical items that the selected department will order (these will vary by department). Pick the one you want to order.

04

Here you will add the items to your order by selecting the **Add to Cart** button. Note that quantities can be edited in the Cart. If you are done, select **View Cart** to continue. If you need other items, select the **Continue Shopping** button.

STORE ITEMS – Cart Management

Empty the cart:

A.
- Click on the Empty the Cart button.

Prices presented on this screen may not reflect the final cost of the job. It is an approximation.

Shopping Cart

Pricing for IMSD #176

| << Continue Shopping | Update Quantity | | Checkout |

Item	Qty		Unit Price	Extended
HOC Bus cards Individual Name: Business cards, Box of 1000 cards of 1 Min Qty: 1	1	Remove	$75.00	$75.00
HOC Form #151 Inmate Movement card, 5,000 of 1 Min Qty: 1	1	Remove	$225.00	$225.00

Empty Cart

Subtotal $300.00
Sales Tax (0%) $0.00
Order Total $300.00

| << Continue Shopping | Update Quantity | | Checkout |

From the Cart, you can do the following:
A. Empty the cart.
B. Update quantities.
C. Remove a line item.
D. Check out.

Check out:

D.
- Click on the Checkout button.

B.
Update quantities:
- Change number in Qty box of the correct line.
- Click on the Update Quantity button.

C.
Remove a line item:
- Locate correct line.
- Click on the Remove button.

Checking Out - Overview

The final step of all types of orders (store, other) conclude with billing and shipping information. During this final step, you will be shown a screen that is divided into two sections: 1) Billing, and 2) Shipping.

Before you check out you will need the following Advantage chart of account codes:

- Required
  - Agency (3 characters)
  - Org (4 characters)
  - Fund (4 characters)
  - Object (defaults to 9749 and cannot be changed)

- Optional
  - Activity (4 characters)
  - Function (4 characters)
  - Funding Source (6 characters)
  - Project Number (8 characters)
  - Reporting Category (4 characters)

Depending on how you get to the Billing screen, you will either see of these sections.

Checking Out - Billing

Billing

Account Number

Agency	
Org	
Fund	
Object	9749 ▼
Activity	
Function	
FundSrc	
Proj#	
RepCat	

[My Account Numbers]

This next section is where you record the Advantage chart of account records to be billed for this order. Note that you MUST provide the first 3 (see below for expectations). The accounting codes you provide will be validated in the next step of the check out process.

- Required
  - Agency (3 characters)
  - Org (4 characters)
  - Fund (4 characters)
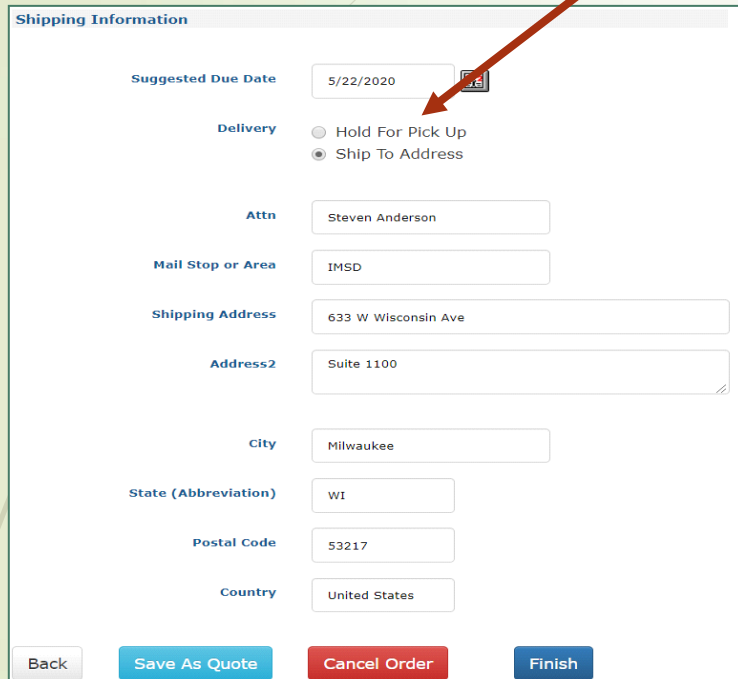 - Object (defaults to 9749 and cannot be changed)

- Optional
  - Activity (4 characters)
  - Function (4 characters)
  - Funding Source (6 characters)
  - Project Number (8 characters)
  - Reporting Category (4 characters)

Checking Out - Shipping

Changing this date only indicates the date you would like to receive the order. It is not a commitment by HOC to deliver by that date.

Shipping Information

Suggested Due Date	5/22/2020
Delivery	○ Hold For Pick Up
	● Ship To Address
Attn	Steven Anderson
Mail Stop or Area	IMSD
Shipping Address	633 W Wisconsin Ave
Address2	Suite 1100
City	Milwaukee
State (Abbreviation)	WI
Postal Code	53217
Country	United States

Back   Save As Quote   Cancel Order   Finish

Depending on how you get to the Billing screen, you will either see of these sections.

Save Estimate
Save As Quote

Selecting either of these buttons will save your order and HOC Print Shop can verify the cost for you, before you place the order.

Submit Order
Finish

Selecting either of these buttons will trigger the account validation routine. If there are issues with an account reference, you will get an error message telling you what is wrong. See next slide.

Cancel Order

Selecting this button will cancel the entire order

Checking Out - Validation

Message	What it means
Account Number Invalid: Org is required. Account Number Invalid: Fund is required.	One of the three required account numbers were not provided.
Agency(5555) is not valid. Should be a 3-digit number from the Chart of Accounts in Advantage.	A provided value for an account number does not meet the length requirement (from Advantage) and/or could not be found in the current Chart of Accounts.
Activity(2) is not valid. Should be a 4-digit number from the Chart of Accounts in Advantage.	Optional fields must either be blank or contain a valid account number from the current Chart of Accounts.

Wrong value

Everything is checked and right when you see a screen like this. Your order is complete.

Order Process Complete

Your order has been submitted. Thank you!

Print Order #   484   View Order Summary   Print Job Ticket

Job Name   **Test Job (Steve Anderson - Do not print)**

Current Status   **Submitted**

Thank you. Your order has been submitted. We appreciate your business.

Add Another Print Order to this Project

Placing Print Orders

There are 12 different types of standard print services offered by HOC. Within each type, there are several variations (size, finish, binding, etc.

- Simple copies
- Business cards
- Stationary
- Newsletter
- Pads
- Brochures

- Envelopes
- Folded booklets
- NCR / Carbonless
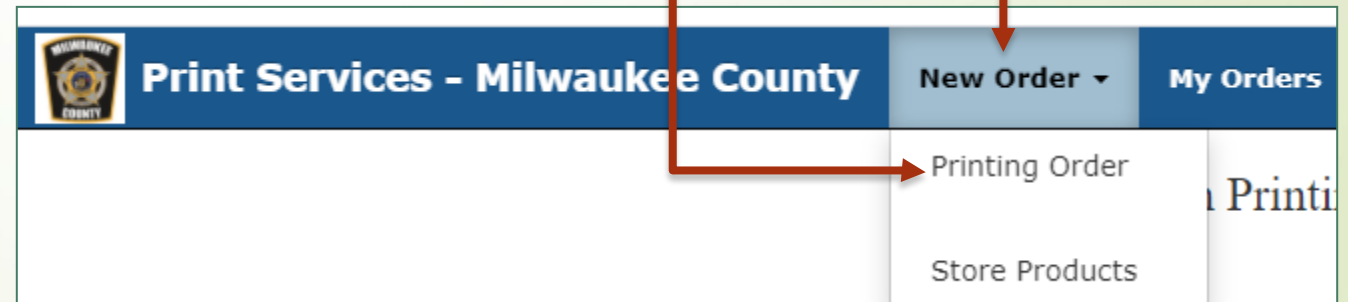- Post cards
- Posters
- Spiral-bound books

Placing Print Orders

In some cases, you may not find a needed print order in the Store Items area of your department. It is likely that these types of printing needs are more random or unique. Placing orders starts from the home page by selecting the Quick Copy or Print Services button. Or you can pick the New Order menu choice followed by the Printing Order.

Placing Print Orders – Step 1

01 Step one is to click on the icon or words that best describes what you want to have printed.

02

In step 2 you pick the finished print size for your order. Simply click on the size you want you will be advanced on to the third step in the process

Placing Print Orders – Step 3

03

Step three is about providing a job name, copies and format, along with paper stock information (style, weight and color).

Note: the system will not allow you to move on to the next step if any of the necessary input is missing.

Click on the Continue button to move to step 4.

04

In this step you will provide project finishing information like binding, hole punches, collating and special instructions.

Click on the Continue button to move to step 5.

Placing Print Orders – Step 5

05

In this step you will provide the source document(s) that you want as the master(s) for the print job.

Selecting the No – Skip Attaching a File button takes you directly to the final step checking out.

To add a file, choose the Browse button. You will get the standard Windows file choice dialog boxes. Locate your file and select it. Identify the file type and provide any special instructions for the file. Select the Attach File button to advance.

If you have more files to add, select the Attach Another File button. When you are done attaching files, select the Continue button. You will go the final step of checking out.

Check Out

Check Out

Placing Store Orders – Starting

Store Items

T-shirts, Polos/Embroidery & Other Custom Items:

T-shirts, Polos, Hats, Totes, Mugs, Water Bottles, Pens & Koozies
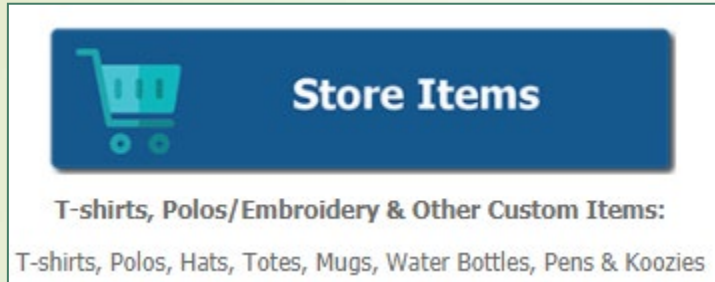
The HOC print shop can provide printing on other types of merchandise. These items include T-shirts, Polos, Hates, Totes, Mugs, Water Bottles, Pens & Koozies. They use screen printing or embroidery.

Placing store orders starts from the home page by selecting the Store Items button. Or you can pick the New Order menu choice followed by the Store Products.

Print Services - Milwaukee County   New Order ▼   My Orders

Printing Order

Store Products
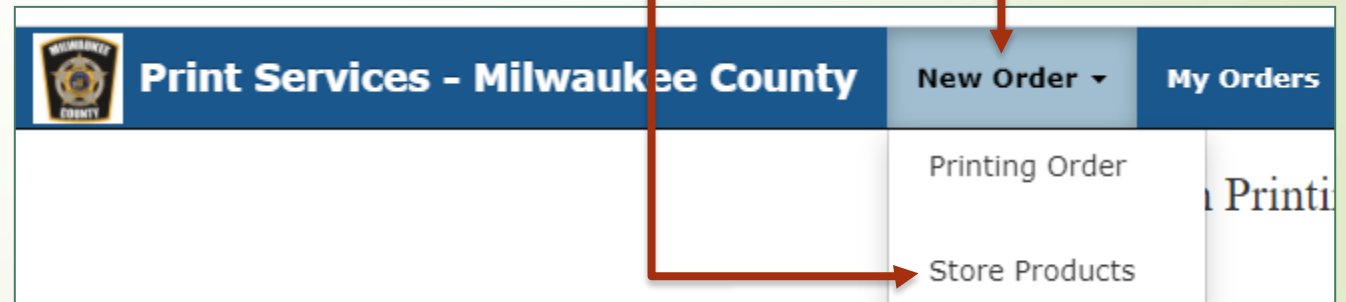
Placing Store Orders – Adding Items to Cart
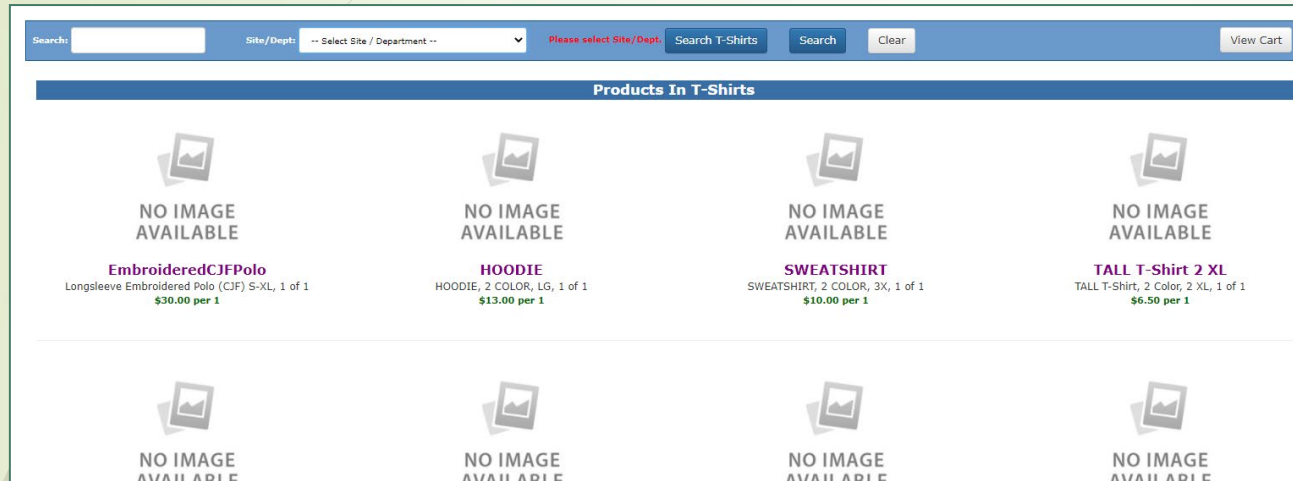
01

Next you will see available options. Pick the one you want to order.

02

Here you will add the items to your order by selecting the [Add to Cart] button. Note that quantities can be edited in the Cart. If you are done, select [View Cart] to continue. If you need other items, select the [Continue Shopping] button.

Placing Store Orders – Cart Management

A. Empty the cart:
- Click on the Empty the Cart button.

Prices presented on this screen may not reflect the final cost of the job. It is an approximation.

Shopping Cart

Pricing for IMSD #176

<< Continue Shopping	Update Quantity		Checkout

Item	Qty		Unit Price	Extended
T-Shirt Large T-Shirt, 2 Color, Large, 1 of 1 Min Qty: 1	1	Remove	$5.50	$5.50

Empty Cart

	Subtotal	$5.50
	Sales Tax (0%)	$0.00
	Order Total	$5.50

<< Continue Shopping	Update Quantity	Checkout

From the Cart, you can do the following:
A. Empty the cart.
B. Update quantities.
C. Remove a line item.
D. Check out.

D. Check out:
- Click on the Checkout button.

Check Out

B. Update quantities:
- Change number in Qty box of the correct line.
- Click on the Update Quantity button.

C. Remove a line item:
- Locate correct line.
- Click on the Remove button.

Viewing & Duplicating Orders

Print Services - Milwaukee County New Order ▾ My Orders

01 The first couple of steps in viewing or duplicating orders are essentially the same. The first step is to select the My Orders menu choice from the main menu bar.

02 The second step is to find the order you want to view or copy. If your order screen does no have a lot of orders in it, you can simply look for the OrderID or any other identifying information to single out the order you want.

OrderID	Type	Req#	Job Name	Contact	Project	Site/Dept Code	Account Number	Amount	Created Date	Status Date	Shipped	Status	
634	Print		Test	Steven Anderson		IMSD #176	116-1162-0026-9749	$10.04	12/30/2020	12/30/2020	No	Denied	View

Print Category	All Orders	Site/Dept		Created Date Start		Status Date Start		# Records per Page	100	☐ Shipped
Status Category	All	Job Name		Created Date End		Status Date End		Account Number Contains		☑ My Orders Only
Order Type	All Types	OrderID		Project Contains		Requisition# Contains				

Apply Filter **4 Orders Found** Export List

Or you can use the order filter at the top your order page.

Viewing & Duplicating Orders

03 Once you have found the right order, you click on the word "View" to the right side of the line.

...mber	Amount	Created Date	Status Date	Shipped	Status	
026-9749	$10.04	12/30/2020	12/30/2020	No	Denied	View

04

The next screen you will see is a view of the order you chose. From here you have three basic options:

1. Review it and exit (completing the viewing an order portion of these instructions).
2. Print a Ticket (see next page).
3. Copy the order (see the following slide).

Viewing & Duplicating Orders – Job Ticket

Duplicating Orders

01

When you have the order you want to copy, you start the process by clicking on the Copy Order button at the top or bottom of the display screen.

Order Detail for Order ID 634

| Back | Copy Order | Print Ticket |

02

After clicking on the Copy Order button, the system will create a new order (Order ID will change). From there it is simple to change what is needed.

If this is going to be billed to another accounting string, refer to slides 10 - 14 for instructions.

Edit Print Order ID 678

Back   Cancel Edit   Save

Estimate
Price Each

Job Name	Test 1/7/2021
Site/Dept	IMSD #176
Contact	Steven Anderson

Order Category Simple Copies
Finish Size 8-1/2 x 11

Status Quote Only
Date Due 1/21/2021
Due Time

Account Number

Agency	116
Org	1162
Fund	0026
Object	9749
Activity	
Function	
FundSrc	
Proj#	
RepCat	

Account Number

Prior Valid Entries

Terms

03

Continue to work through the order, modifying as needed.

Note: you can:
- Change number of copies.
- Change paper stock.
- Add a new file.
- Change special instructions.
- Change binding, hole punch and collate options.
- Change any of the shipping information.

04

When you have everything set the way you need it, Click on the Save button (or you can cancel the edits by selecting that button).

05 After saving your edits, the system will return a screen with the details as you edited them. Before going forward, you should review the order as it is presented.

Order Detail for Order ID 681

| Back | Edit Order | Copy Order | Print Ticket | | Estimate | $10.40 |
| Cancel Order | Submit Order | | | | Price Each | ($1.04 per Set) |

06 After your review you have several options. Click on the button that fits your needs at this point.
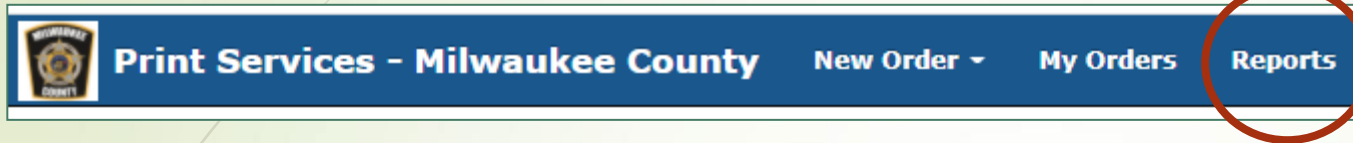
- Go back a page.
- Re-edit the order.
- Copy the order.
- Print a hard copy of the order.
- Cancel the order.
- Or submit the order as is.

07 After submitting the order, the system will go through the account number verification process. See slide 14 for details.

Core Reports

There are four basic reports that are available:

- Status Report
- Past Orders Report
- User Report (Sales by User)
- Account Report (Sales by Account)