DFS Online Document Management & Fulfillment

User Guide
January 2012

DFS USER GUIDE

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TIP#1: Use Internet Explorer as your web browser.

Access a portal

You may have received an email notification with specific project access details. If so, follow the instructions and use the link within that email.

OR : **You can access the login page through the BarkerBlue website** www.barkerblue.com

Click on the **DFS LOGIN** link.

barkerblue

REQUEST A PICKUP   DFS LOGIN   UPLOAD A FILE

A new look.
A new direction.
A new blue.

Choose your blue:

DIGITAL PRINT & DISPLAY GRAPHICS

CONSTRUCTION INFORMATION MANAGEMENT

The "Search DFS Login" page will appear.

Enter the appropriate DFS **Portal Owner** and **Project Password**.

If you don't have this information, contact support@barkerblue.com

REQUEST A PICKUP   DFS LOGIN   UPLOAD A FILE

barkerblue

DFS Login

ReproMAX
DFS

DFS Web Portal Owner

Project Password
If there is no Project Password, leave this field blank.

Search   Reset

Launching A ReproMAX DFS Web portal:
To view a company's DFS (Document Fulfillment System) Web Portal, enter in at least the first three letters of that DFS Portal Owner Name (or any part of name) & the project password, then click on "Search".

For technical support or if you are having trouble locating the correct DFS Web Portal, please e-mail us at Technical Support.

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Login

Enter your personal Username and Password and click the "Login" button.

Can't remember your DFS login? *Click on the "**Forgot Password**" button and it will be emailed to you*

TIP#2: Your access information is confidential.
Please do not share your login and password even within your company.
If someone needs access,
see the instructions below:

If you do not have a login

Email support@barkerblue.com

Include the details listed here

A login and password will be

emailed to you.

Information necessary to complete access set up.

1. Project Name

2. First and Last Name

3. Current Email

4. Company Name & Address

5. Delivery or Jobsite Address

6. Work #, Mobile #, Fax #

If you supplied a valid User Name and Password, the User Service Agreement will display.

Please review and then click on the "I Accept" button.

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Viewing Plans

To narrow down the listed projects, you can conduct a search.

Enter the criteria where applicable and click the "Search" button

Click on the project you would like to view or order.

- **For List View, click on the project name to open the project.**
- **For Thumbnail View, click on the link "View project details" to open the project.**

"List View" shows a list of the items by name along with other details.

"Thumbnail View" shows a thumbnail image of the drawing and the name.

TIP#3: *You may set the view as a preference in your personal settings.*

Click on "My Account"

Then select "Update Profile Information"

Click on the "Preferences Tab"

Look under "Display Options" for: Search Results
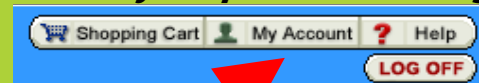
Enter the project password if prompted.
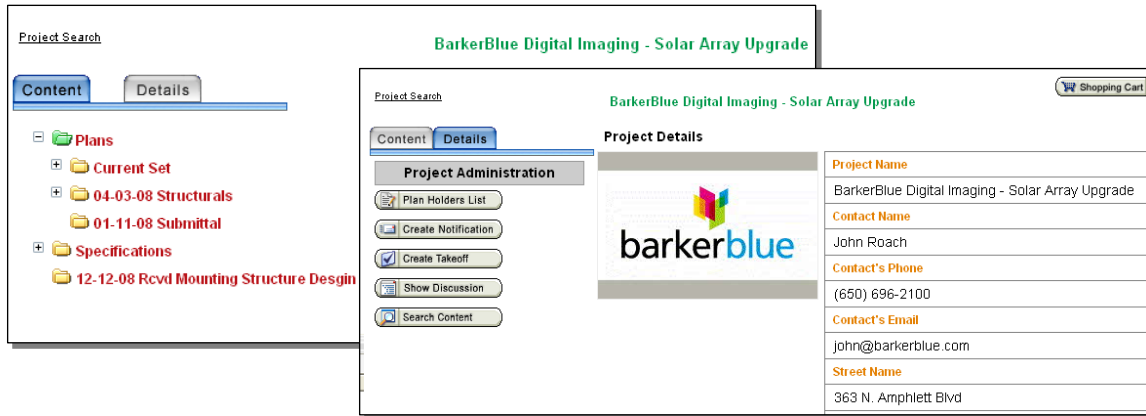
The project password is different from your personal login password.

If you need the project password contact support@barkerblue.com

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Viewing Project Content and Details

The "**Content**" tab lists the content within the project such as plans, specs, etc.

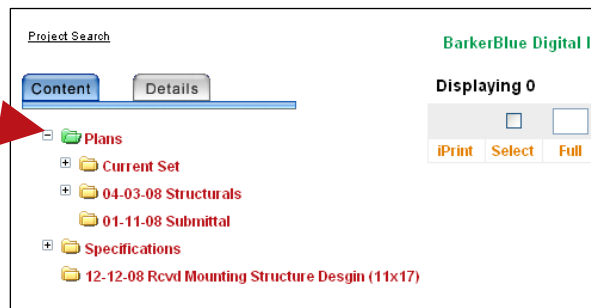The "**Details**" tab lists project details such as contact and project address.
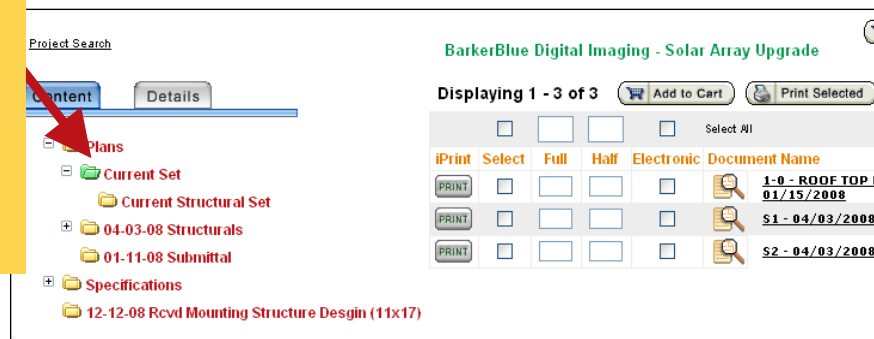

Click on a folder to open and view the list of documents.

If there are specifications they are generally posted online by division.

Click on the **Current Set** folder icon. By clicking on the "**+**" next to the folder, you can look at sub-sets within that folder, usually broken into disciplines.

TIP#4: Outdated versions of drawings will appear with a red dot

For assistance, contact support@barkerblue.com or call Barker Blue (650) 696-2100 / (866) 347-1011

Want to view the drawings or documents?

In **List View**, click on the Document Icon to view an 11x17 PDF version* of the file.

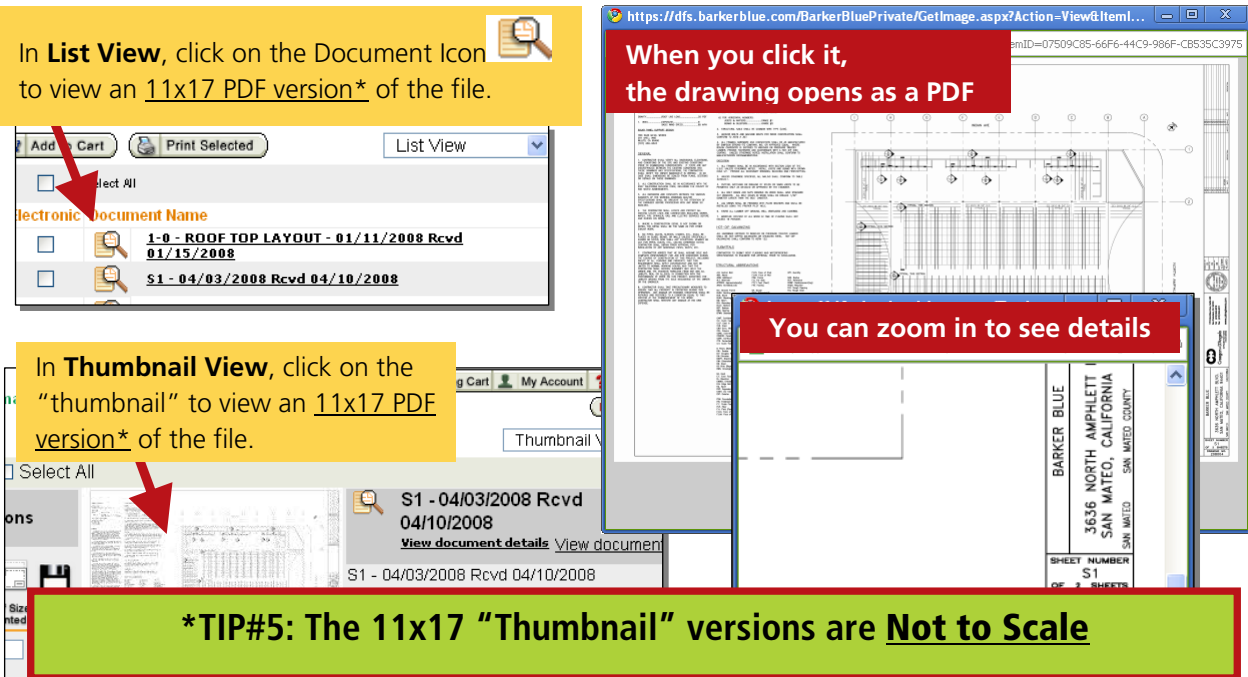In **Thumbnail View**, click on the "thumbnail" to view an 11x17 PDF version* of the file.

When you click it, the drawing opens as a PDF

You can zoom in to see details

*TIP#5: The 11x17 "Thumbnail" versions are Not to Scale
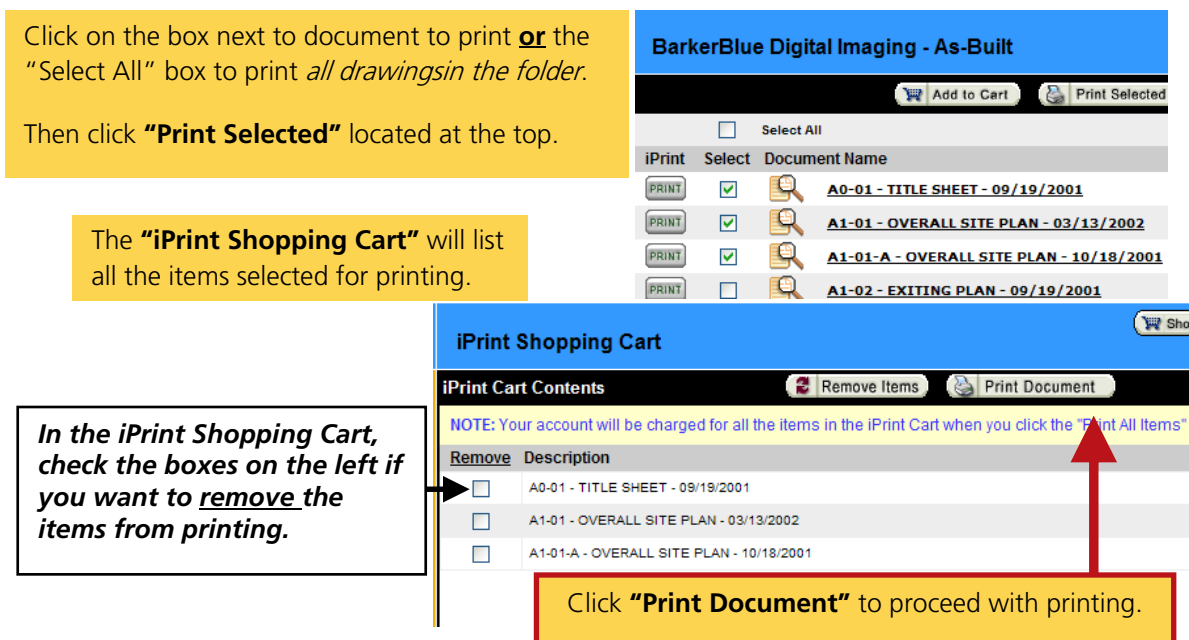
Want to print the drawings locally? *The "iPrint" feature is an Hewlett Packard plug-in and will only work if you have a HP brand plotter.*

Click on the box next to document to print **or** the "Select All" box to print *all drawings in the folder*.

Then click **"Print Selected"** located at the top.

The **"iPrint Shopping Cart"** will list all the items selected for printing.

In the iPrint Shopping Cart, check the boxes on the left if you want to remove the items from printing.

Click **"Print Document"** to proceed with printing.

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Ordering Prints

**Locate the Project/Set items you would like to order.**

Select the sheets individually or choose "**Select All** for the package/discipline.
You can also enter the # of Full or Half size sets needed by sheet or enter # in top column to populate entry for all sheets.

Then click "**Add to Cart**"
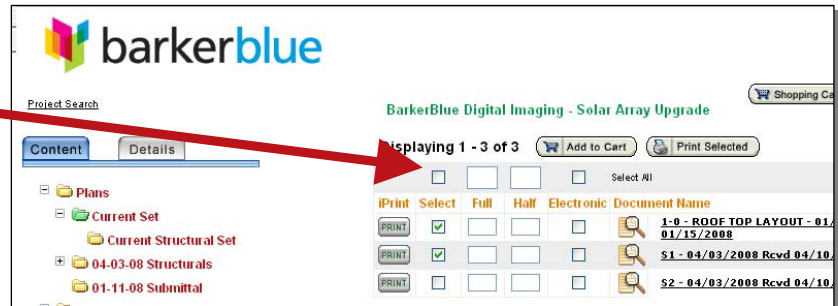
The Shopping Cart page will appear.

This is also the page where you can attach a PDF formatted transmittal to include with your order.
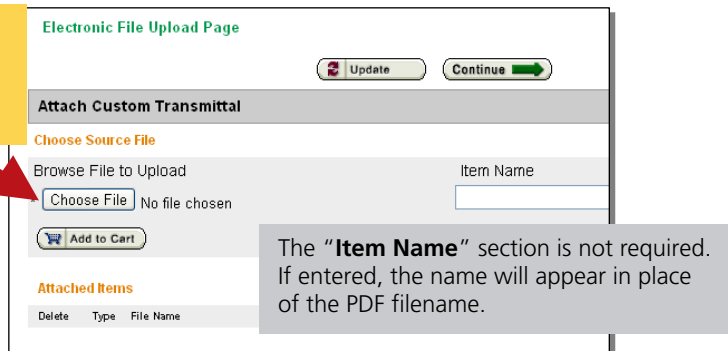Click on the "**Attach Transmittal**" button. *If you do NOT want to attach a transmittal, proceed to page 8.*
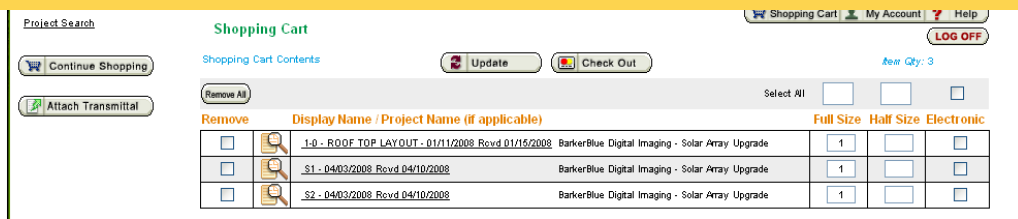
The Electronic File Upload Page will appear.

Browse for the PDF formatted transmittal file.

Select "**Add to Cart**"

The file will appear under the Attached Items section.

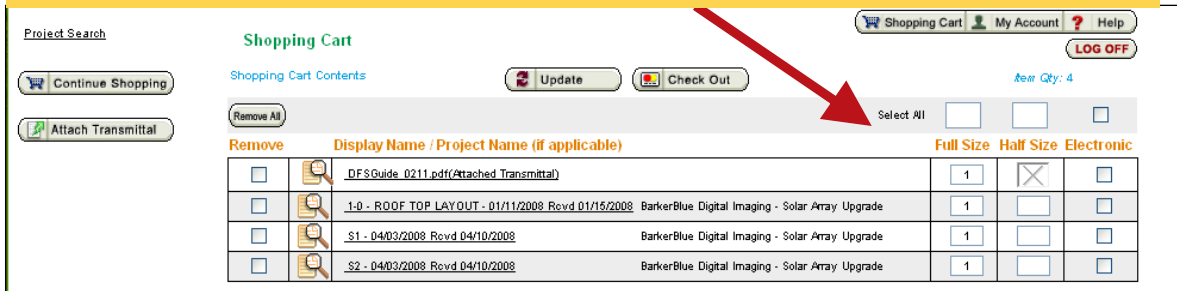Click the "**Continue**" button at the top.

The "**Item Name**" section is not required. If entered, the name will appear in place of the PDF filename.

Look for transmittal file path as an item listed on the "**Shopping Cart Contents**" page to show it was attached correctly.
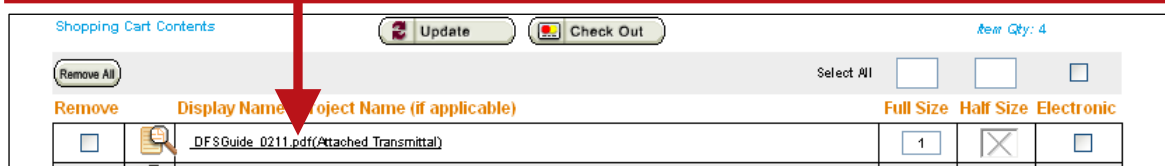
Verify all the items you need are listed
*Some sets may be restricted to Full Size only.

The quantity "1" will automatically populate the Full Size column if you did not previously change the quantity per size. **Enter the quantities of Full/Half Size prints needed for your order.**
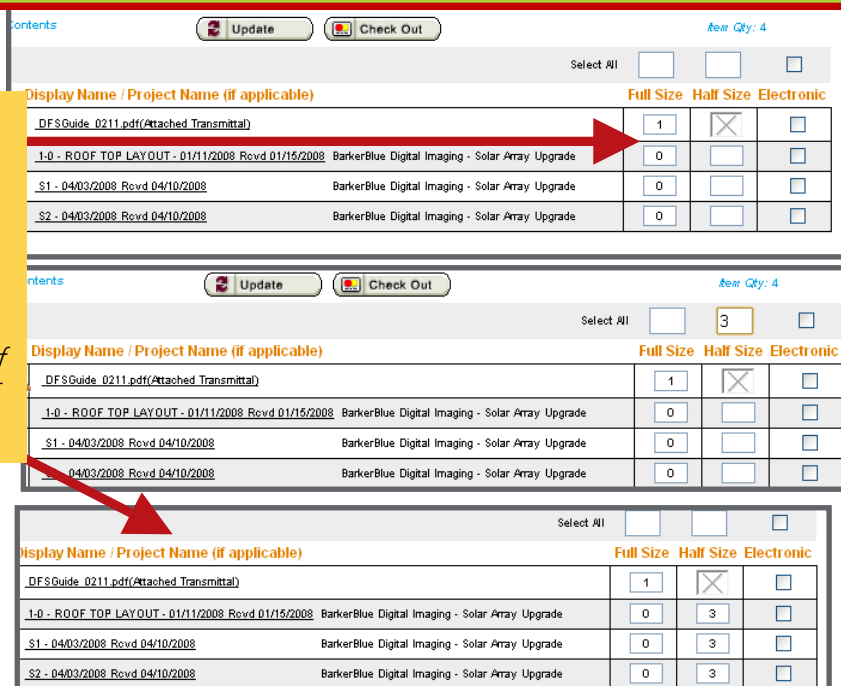

TIP#6: If you attached a transmittal, <u>leave it as 1 FULL size</u> item or it will be removed from the order.

If you don't want ANY Full Size, change the **Full Size drawings to: 0** For any Half Size prints needed, enter a quantity in that column.

The example shows 3 half size and 0 full size sets of drawings.

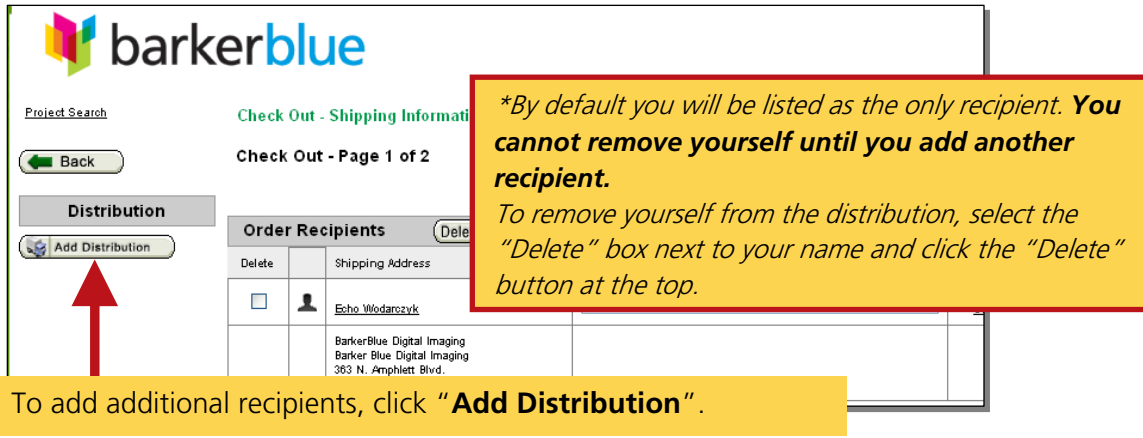You can further customize each recipient's package in the check out screen.

When complete click the "<u>Update</u>" button.

Check to ensure the correct quantities are listed for the sets/drawings.

Then click the "<u>Check Out</u>" button.

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Checkout Process

Confirm Order Recipient's information for shipping
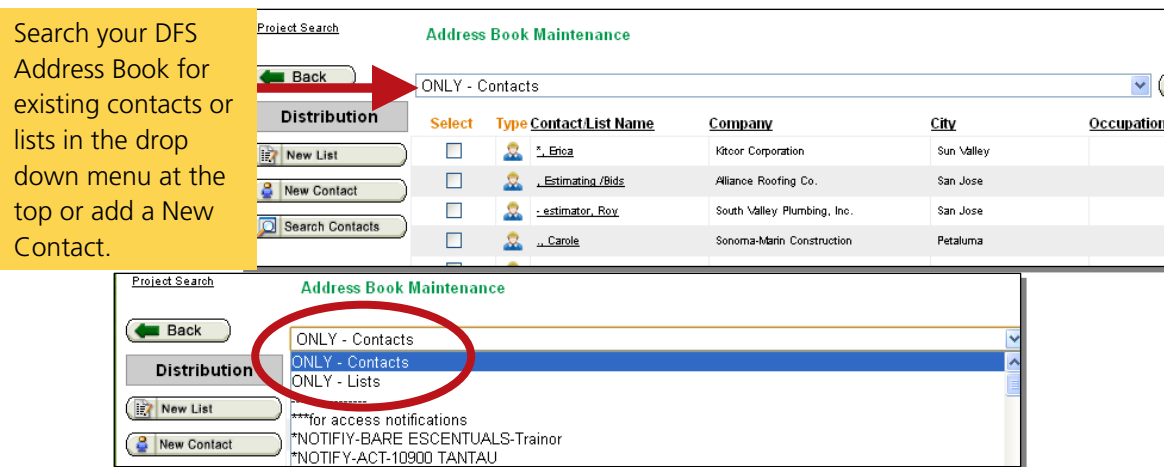
*By default you will be listed as the only recipient. **You cannot remove yourself until you add another recipient.***

To remove yourself from the distribution, select the "Delete" box next to your name and click the "Delete" button at the top.

To add additional recipients, click "**Add Distribution**".

The Address Book Maintenance page will appear.

Search your DFS Address Book for existing contacts or lists in the drop down menu at the top or add a New Contact.

Select the contact for the order.

Then click on the "**Add to Order**" button.
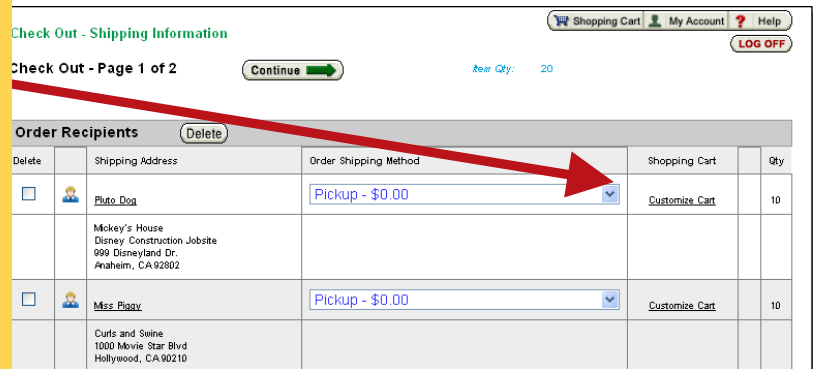
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The Check Out-Shipping Information page will appear.
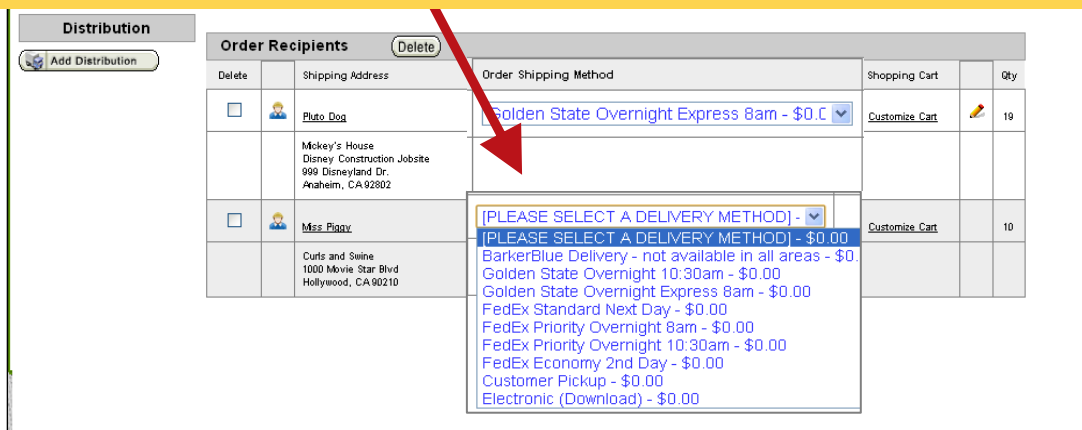
To modify quantities per recipient, click on the "Customize Cart" link. This will take you into that recipient's cart where you can change the quantity of full or half size prints for their package.
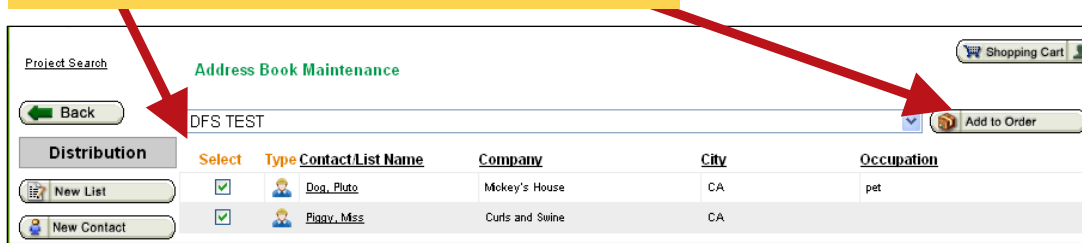
Make sure to click "Update" after making changes.

You will see that the changes to a recipient's package have been updated when the "pencil icon" appears next to that contact's cart and the quantity will change accordingly.

Select a shipping or delivery method **for each recipient** by using the drop down menu. Click the "**Continue**" button at the top to complete the final details of your order on the next page.

PLEASE NOTE: shipping and delivery costs are NOT listed here or within the DFS system. If you have questions about shipping or delivery fees, contact our Customer Service Department 650-696-2100.

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The Order Information Check Out - Page 2 of 2 will appear.

Utilize the "Order Name" and "Reference Number" fields as needed.
Many users use these areas to enter the PO# or Project #.

Confirm the "Date" and "Time" fields are set to **when the order is due**!
Otherwise the system defaults to Next Day at 12:00PM.

Select the Binding Type and Media (paper) color using the drop down menus*.*

Order Information

Check Out - Page 2 of 2   🖥 Purchase

Additional Order Information

Order Name:	Reference Number
For YOUR reference	PO or JOB #?

Requested Date

* Date: (M/d/yyyy)	* Time: (h:mm tt)
2/5/2011	12:00 PM

Order Output Preferences

Binding Type: Media Color:

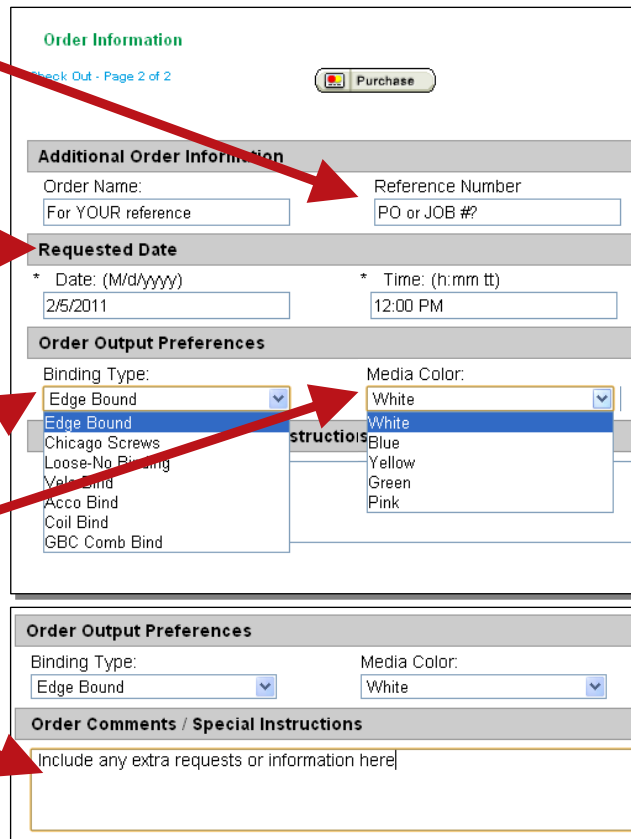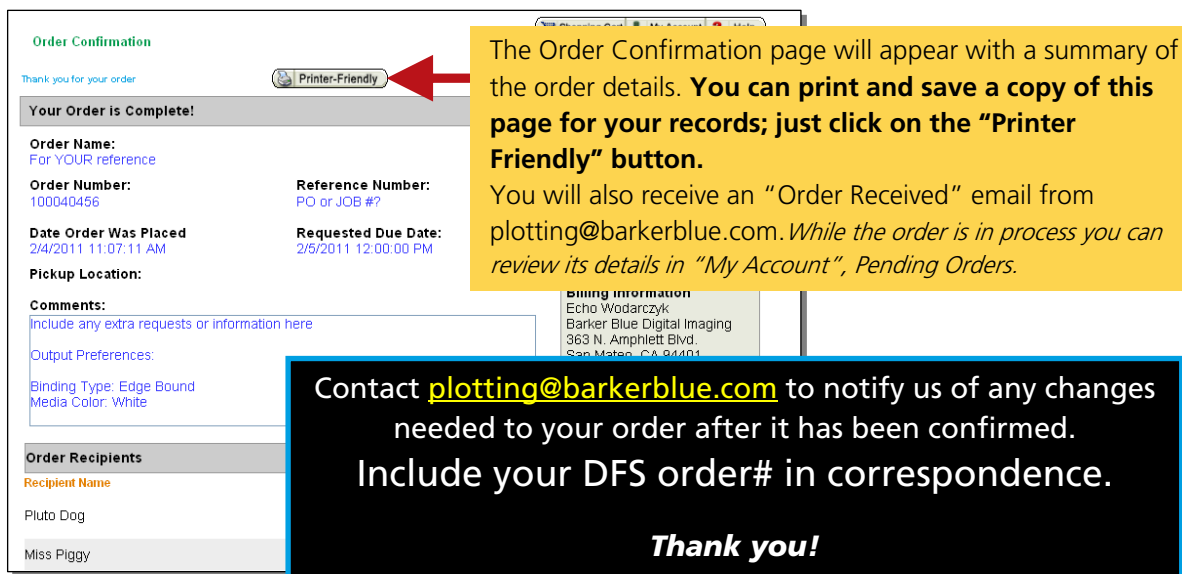Edge Bound   White
Edge Bound   White
Chicago Screws   Blue
Loose-No Binding   Yellow
Velo Bind   Green
Acco Bind   Pink
Coil Bind
GBC Comb Bind

Enter any extra information into the **Order Comments/ Special Instructions** section.

Order Output Preferences

Binding Type: Media Color:
Edge Bound   White

Order Comments / Special Instructions

Include any extra requests or information here

Click "Purchase" to complete your order.

Order Confirmation

🖨 Printer-Friendly

Thank you for your order

Your Order is Complete!

Order Name:
For YOUR reference

Order Number: Reference Number:
100040456   PO or JOB #?

Date Order Was Placed   Requested Due Date:
2/4/2011 11:07:11 AM   2/5/2011 12:00:00 PM

Pickup Location:

Comments:
Include any extra requests or information here

Output Preferences:

Binding Type: Edge Bound
Media Color: White

Billing Information
Echo Wodarczyk
Barker Blue Digital Imaging
363 N. Amphlett Blvd.
San Mateo, CA 94401

Order Recipients

Recipient Name

Pluto Dog

Miss Piggy

The Order Confirmation page will appear with a summary of the order details. **You can print and save a copy of this page for your records; just click on the "Printer Friendly" button.**
You will also receive an "Order Received" email from plotting@barkerblue.com.*While the order is in process you can review its details in "My Account", Pending Orders.*

Contact plotting@barkerblue.com to notify us of any changes needed to your order after it has been confirmed.
Include your DFS order# in correspondence.

Thank you!

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Some portals have an "Electronic Download" option available.
This feature allows you to order downloadable <u>FULL SIZE PDF files</u> of the plans.

Here are examples of the *electronic download* order process.

If you click on the "**Select All**" box at the top, then all the drawings in that folder will be included in the download.
Or you can select just specific drawings for which you need the electronic versions of.

Click the **"Add to Cart"** *button* to proceed with the order.
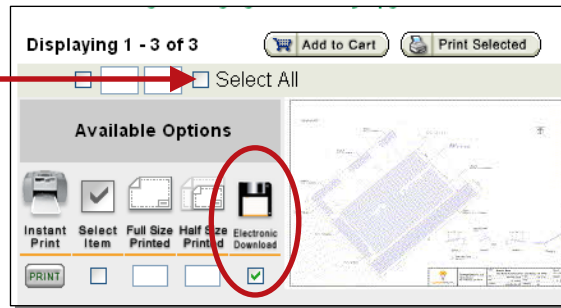
The drawings are listed and the chosen format on the Shopping Cart

Click **"Check Out" to** proceed with the order.
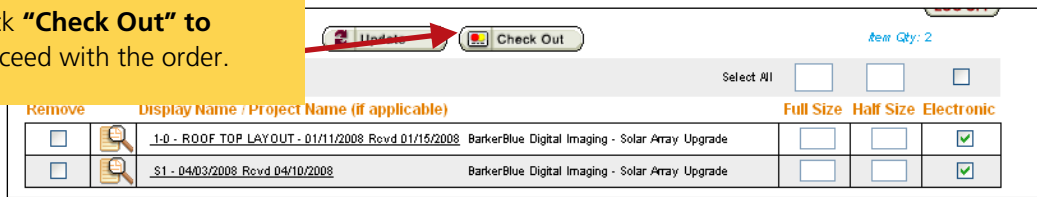
Review the Check Out pages.

A link to the files will be provided on the "Order Confirmation" page.

Click "**Continue**".
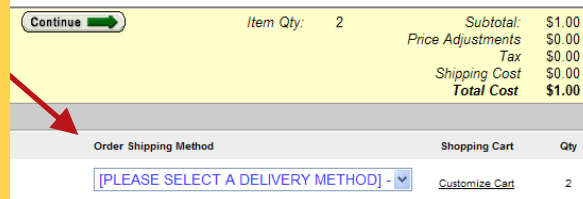
Fill out any order Name or Reference Number details as needed for your own records.
Enter any PO numbers in these fields or in the "Order Comments / Special Instructions" area.
Click "**Purchase**" to complete your order.

The Requested Date is automatically populated for the next day at 12:00pm. The link to download the files will process immediately on the 'Order Confirmation" page, so the time is irrelevant.

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The Order Confirmation page will appear.

The link to download the full size PDF files for the drawings you have selected is located at the bottom in the "Electronic Files" section.
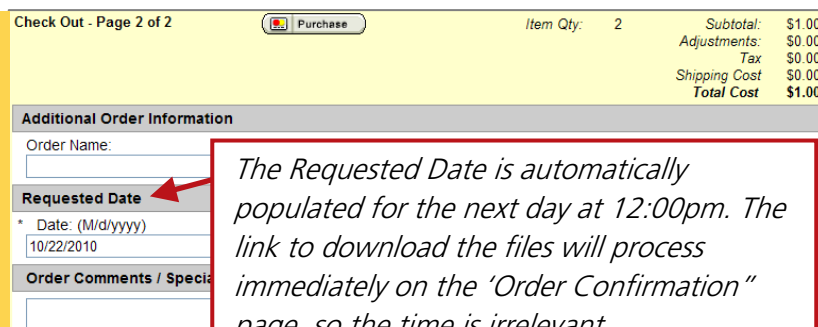
When you click on the link you will see the "**Electronic Library**" which will provide you 2 options for getting the files. Click the "Download Files" button or individual links.
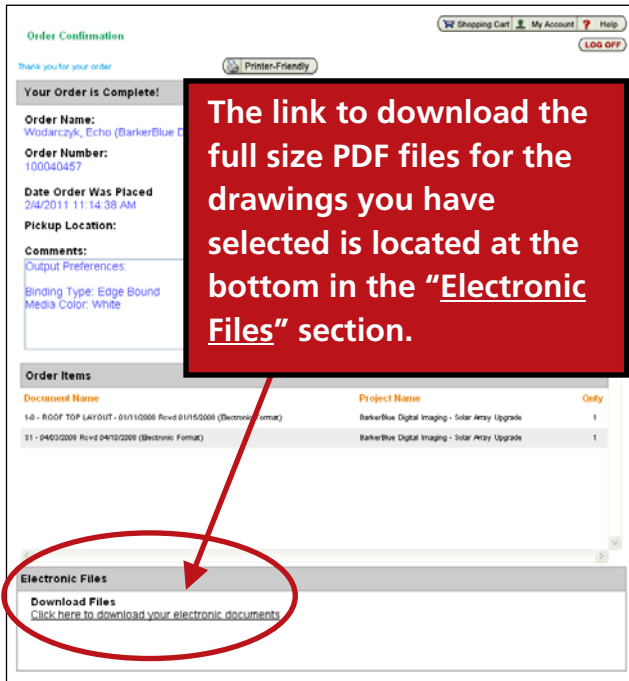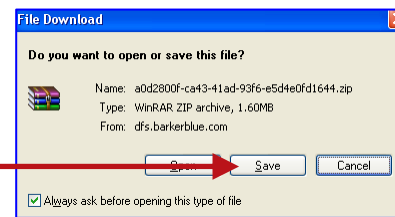
If you click on the "Download Files" button you will be able to save a .zip file with all the PDF files included within it.
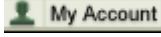*If you click on the individual file "link" you will save the individual PDF.*

Whatever download option you choose, the "File Download" window will appear.
"Save" the files onto your computer in a location you will remember.

You're Done!

If you need the same files again the download link is contained within your DFS account.
To access the link again, you need to login to the project. Then click on the My Account *button.*

Click on the "**Completed Orders**" link. A new page will list all your DFS orders. Click on the order which you placed the order for.
The order information detail page will appear.
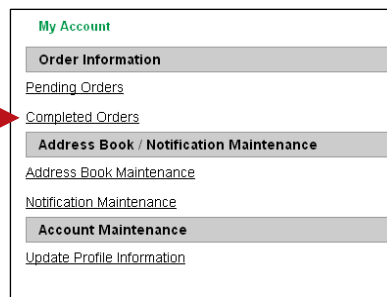
Click on the "**Download Files**" button.

You will be able to download the same files again without placing another order.

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For assistance, contact support@barkerblue.com or call Barker Blue (650) 696-2100 / (866) 347-1011

![barkerblue logo]
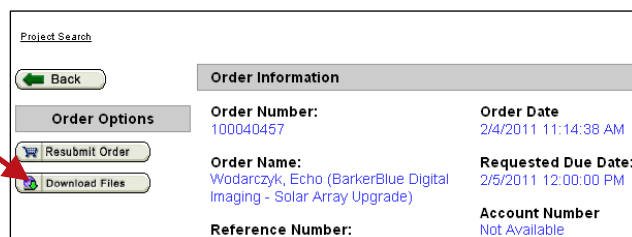
Update My Account Information

Update your phone number, address, email, etc.

Log in

Click on the **"My Account"** button in upper right.

Select **"Update Profile Information"**
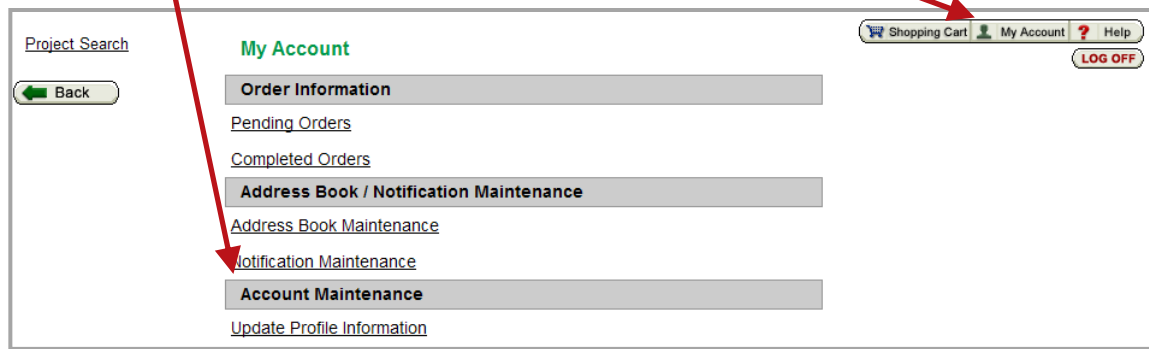

Project Search	My Account	Shopping Cart ⬝ My Account ? Help
⬅ Back		LOG OFF

Order Information

Pending Orders

Completed Orders

Address Book / Notification Maintenance

Address Book Maintenance

Notification Maintenance

Account Maintenance
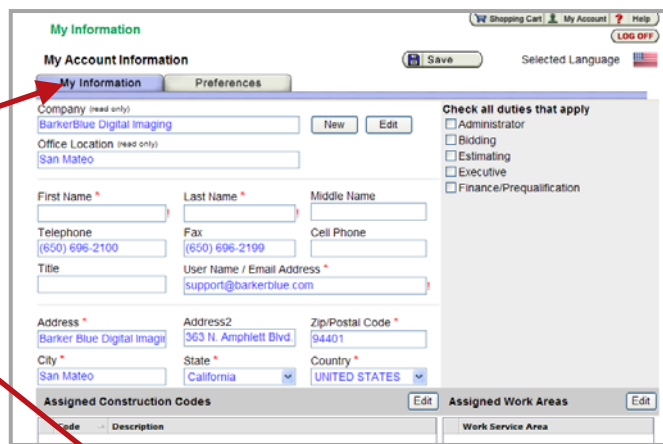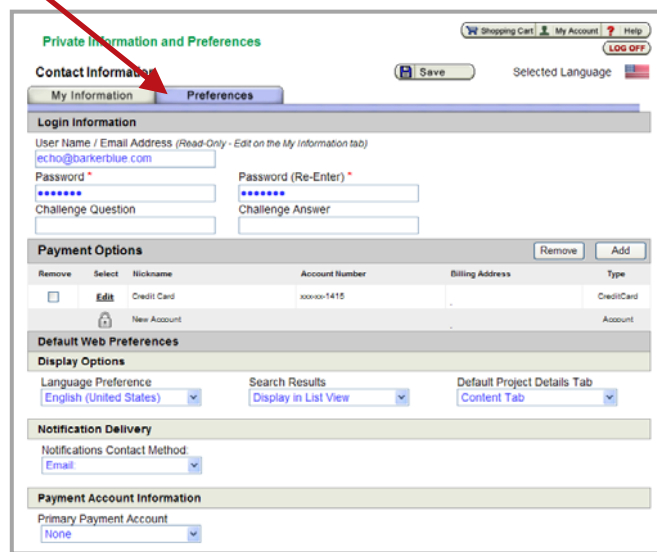
Update Profile Information

There are 2 tabs that contain your account details:

My Information Tab to edit:
Name, Company, Address, Phone Numbers, User Name/Email

Preferences Tab to edit: Password and other Web Preference Options
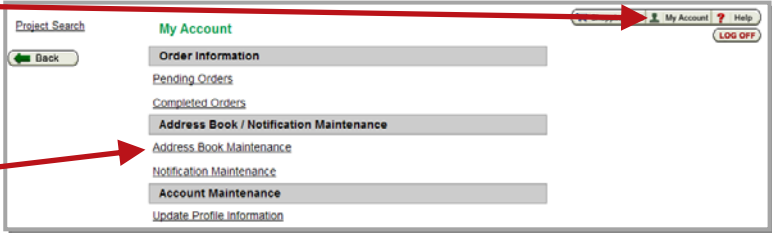
Make the changes to your information and "Save".

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Add Contacts to my Address Book

Log in

Click on the **"My Account"** button in upper right.

Select "**Address Book Maintenance**"

You can create a **New Contact** or a **New List** of contacts depending how you want to organize them.

Create contacts by using their email address to search for that contact in our database; all DFS contacts MUST have a valid email address.

New Contact Email Address

Email Address:

☐ I don't have an email address for this contact

No email address?
If the contact you are trying to add to your Private Directory doesn't have an email address, click the checkbox and then click continue to fill in their information.

Why start with an email address?
We use email as a way to search the PDM Global Address Book to see if that contact has already entered their information.

Cancel   Continue

You can create a list after you create your contacts; just make sure to select the "Save New List" button when done.

Once you create the contacts in your Address Book, you can see them listed and you can sort your list by name, company, etc.

Any contact listed with a 🔒 symbol has verified their login details and owns their information so it cannot be edited by anyone else. If you believe there are any errors on their details, please email support@barkerblue.com so we may contact them.

PLEASE NOTE:
Creating a contact DOES NOT assign access to them.
If you need to set up access, please email support@barkerblue.com

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