RSA

Placing Orders in WebCRD™

Version 9.0

User Task Aid

Document Conventions

The following conventions are used in this guide:

Field names, Drop-down lists, and Section names are *italicized*.

Button names and actions are shown in **bold**.

≋ Note: Indicates additional information that may be helpful as you work.

✖ ALERT   Indicates important information that you should read and pay attention to.

Contents

Managing Your User Profile

The My Profile page contains information about you, including your contact, billing, and shipping information any approval chain you may have, and your default printing options. The information contained on the page is used throughout the system when placing orders and providing order status updates.

If you belong to Workgroups, you can also manage which groups can place orders on your behalf.

Updating My Contact Information

1. From the *Ordering Home Page*, use the *Title Bar* menu and click on the **My Profile** link.

2. In the *My Contact Information* section, click on **Modify**.

    *Note: By using either the **Personal** or **Global** buttons, you can select an existing contact to use.*

3. Update your contact information as necessary.

4. Click the **Save** button at the bottom of the page.

Updating Default Shipping Information

1. From the *Ordering Home Page*, use the *Title Bar* menu and click on the **My Profile** link.

2. In the *Default Shipping Information* section, click on **Modify**.

    *Note: By using either the **Personal** or **Global** buttons, you can select an existing contact to use as your shipping address.*

3. Update your contact information as necessary.

4. Click the **Save** button at the bottom of the page.

Updating Default Billing Information

1. From the *Ordering Home Page*, use the *Title Bar* menu and click on the **My Profile** link.

2. In the *Default Billing Information* section, click on **Modify**.

    *Note: By using either the **Personal** or **Global** buttons, you can select an existing contact to use as your billing address.*

3. Update your contact information as necessary.

4. Click the **Save** button at the bottom of the page.

Updating Default Printing Options

1. From the *Ordering Home Page*, use the *Title Bar* menu and click on the **My Profile** link.

2. Above the *Printing Options* section, click the Retain drop-down list and select the default retention period for your uploaded documents.

   Note: Your system administrator configures the retention options. You can modify the options for a document using the Retention Period options on the Printing Options page. (See the Changing a Documents Retention Time section of this document.)

3. Under the *Options* section, click on the **Print** tab.

4. Use the *Output* drop-down list to **select your preferred print output**.

5. Use the *Plex* drop-down list to **select your preferred print plex**.

6. Use the Paper stock drop-down list to select your preferred paper stock.

7. Use the Instructions field to enter any preferred default printing instructions to be included with your print orders.

8. Click the **Save** button at the bottom of the page.

Placing Orders

WebCRD provides two ways to place upload a document; (1) using the document creation tool's File > Print Option and (2) uploading the file directly into WebCRD. The first method is an optional module, SurePDF™, and may not be available to all users. Before using SurePDF™, you will need to make sure the SurePDF™ driver has been loaded onto your computer.

Uploading Documents from an Application & Placing an Order

1. With the document open, click on the *File* menu and select the **Print Option**.

2. Use the *Printer* drop-down list to **select the appropriate Print Center** e.g., Print Center - West.

3. Click the **Print** button.

4. Review the document and if acceptable, from the *Title Bar*, click the **Accept** button ![Accept].

5. Use the *Login* portlet to **enter your User ID and Password**.

6. In the *Login* portlet, click the **Log In** button.

   Note: If you have other documents in your Cart, you will be asked if you want to add the new document to My Cart (added to the same order) or A New Cart (replaces the current content of your Cart).

7. Make the appropriate Cart selection and click the **Checkout** button.

8. In the *Order name* field, **enter a name** to use for this order.

9. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.

10. If available, under *Print Options*, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

    *Note: Use the **View Proof** and **Preview** buttons to preview the document before completing your order.*

11. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

12. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

    Note: If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update Ship To information.

    Note: A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.

*Note: Additional shipping information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Shipping Instructions field.*

13. Use the *Billing Information* section to **enter the billing information** for the order.

    Note: If a Bill To person has not been identified, click on the ⸱ icon to open the Modify Billing Information page and update Bill To information.

    Note: A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.

    Change to | My Default | From My Contacts | From Global | New

    *Note: Additional billing information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Billing Instructions field.*

14. When the order is complete, **review** the estimated job cost and **select the Approval checkbox**.

15. Click the **Place Order** button.

    Note: If desired, use the Print Receipt link 🖨 Print Receipt *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Uploading Documents into WebCRD & Placing an Order

1. From the *Ordering Home Page*, from the *Upload a File* portlet, click the **Browse** button.

   The File Upload dialog box will be displayed.

2. **Browse** to the file location and **highlight** the file to be uploaded.

3. Click the **Open** button.

4. Click the **Go** button.

5. In the *Order name* field, **enter a name** to use for this order.

   Note: The order is given a default name, but the default name can be changed.

6. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.

7. Under the *Print Options* section, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

   Note: You may need to click on the Expand arrow ▸ to view the entire section.

   *Note: Use the **View Proof** and **Preview** buttons to preview the document before completing your order.*

8. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

9. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

> **Note:** *If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update the Ship To information.*

> **Note:** *A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.*

> **Note:** *Additional shipping information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Shipping Instructions field.*

10. Use the *Billing Information* section to **enter the billing information** for the order.

> **Note:** *If a Bill To person has not been identified, click on the . icon to open the Modify Billing Information page and update Bill To information.*

> **Note:** *A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.*

> **Note:** *Additional billing information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Billing Instructions field.*

11. When the order is complete, **review** the estimated job cost **and select the Approval checkbox**.

12. Click the **Place Order** button.

> **Note:** *If desired, use the Print Receipt link* *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Placing an Order for Multiple Print Jobs

1. From the *Ordering Home Page*, from the *Upload a File* portlet, click the **Multiple Files?** link.

2. Click the **Browse** button.

3. **Browse** to the file location and **highlight** the file to be uploaded.

4. Click the **Open** button.

5. **Repeat steps 2 through 4** until all documents have been selected.

6. Click the **Upload** button.

   Note: Use the Delete button to the left of a document you wish to remove from the Selected Files section.

7. In the *Order name* field, if desired, **enter a new name** to use for this order.

8. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.

9. Under the *Print Options* section, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

   *Note: Use the **View Proof** and **Preview** buttons to preview the document before completing your order.*

   Note: Use the Trash Can icon 🗑 on the far right hand side to remove an unwanted job.

10. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

11. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

    Note: If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update Ship To information.

    Note: A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.

    *Note: Additional shipping information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Shipping Instructions field.*

12. Use the *Billing Information* section to enter the billing information for the order.

    Note: If a Bill To person has not been identified, click on the . icon to open the Modify Billing Information page and update Bill To information.

> *Note***:** *A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.*

> *Note***:** *Additional billing information and/or instructions can be added to the order by clicking on the* **Special Instructions** *button and entering the information into the Billing Instructions field.*

13. When the order is complete, **review** the estimated job cost and **select the Approval checkbox**.

14. Click the **Place Order** button.

> *Note***:** *If desired, use the Print Receipt link* *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Placing an Order from a Catalog

A Catalog is a collection of documents and items created by a catalog or system administrator that enable end users to access and order common items. Access to a Catalog is determined by your system administrator.

> *Note***:** *A Catalog is also referred to as a Workgroup.*

1. From the *Ordering Home Page*, from the *Search Catalog* portlet, click the **Advanced Search** link.

2. Click the appropriate **Folder** link.

3. **Navigate** to the appropriate item.

4. Use the *Qty* field located to the far right side of the page to **enter the number of items** to be produced.

5. Click the **Add to Cart** button at the bottom of the page.

6. From the *Menu Bar*, click the **Cart** link.

7. Click the appropriate **Folder** link.

8. In the *Order name* field, if desired, **enter a new name** to use for this order.

9. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.

10. Under the *Print Options* section, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

> *Note: Use the* **View Proof** *and* **Preview** *buttons to preview the document before completing your order.*

11. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

12. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

    Note: *If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update Ship To information.*

    Note: *A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.*

    Add another Shipping Address | My Default | From My Contacts | From Global | From Distribution | New

    Note: *Additional shipping information and/or instructions can be added to the order by clicking on the* **Special Instructions** *button and entering the information into the Shipping Instructions field.*

13. Use the *Billing Information* section to **enter the billing information** for the order.

    The entered information will be displayed in the appropriate fields.

    Note: *If a Bill To person has not been identified, click on the . icon to open the Modify Billing Information page and update Bill To information.*

    Note: *A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.*

    Change to | My Default | From My Contacts | From Global | New

    Note: *Additional billing information and/or instructions can be added to the order by clicking on the* **Special Instructions** *button and entering the information into the Billing Instructions field.*

14. When the order is complete, **review** the estimated job cost and **select the Approval checkbox**.

15. Click the **Place Order** button.

    Note: *If desired, use the Print Receipt link* [Print Receipt] *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Placing a Special Order

Orders placed through WebCRD do not have to use electronic documents. WebCRD can also process orders using non-electronic originals e.g., hardcopy documents, CDR-ROM files, etc. These types of orders are referred to as Special Orders.

1. From the *Ordering Home Page*, from the *Special Orders* portlet, click the **Go** button.

2. In **the Order name** field, if desired, **enter a new name** to use for this order.

3. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.

4. Use the *Other Source* drop-down list to **select** the source to be used for this order.

   Note: You may need to click on the Expand arrow ▶ to view the entire section.

5. Use the *Other Disposition* drop-down list to select the action to be taken by the Print Shop.

6. Use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

   *Note: Use the **View Proof** and **Preview** buttons to preview the document before completing your order.*

7. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

8. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

   Note: If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update Ship To information.

   Note: A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.
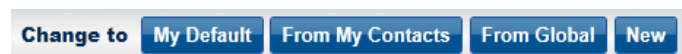

   *Note: Additional shipping information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Shipping Instructions field.*

9. Use the *Billing Information* section to **enter the billing information** for the order.

   Note: If a Bill To person has not been identified, click on the . icon to open the Modify Billing Information page and update Bill To information.

   Note: A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.

*Note: Additional billing information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Billing Instructions field.*

10. When the order is complete, **review** the estimated job cost and **select the Approval checkbox.**

11. Click the **Place Order** button.

Note: It is highly recommended that you use the Print Receipt link *in the upper right hand corner of the page to print a hardcopy of the Order Receipt, attach it to the original document source, and submit both to the Print Center.*

Placing an Order from an My Files

1. From the *Ordering Home Page*, from the *My Files* portlet, click the **Advanced Search** link.

2. Click the appropriate **Folder** link.

3. **Navigate** to the appropriate item.

4. Use the *Qty* field located to the far right side of the page to **enter the number of items** to be produced.

5. Click the **Add to Cart** button at the bottom of the page.

6. Click the **Cart** link on the Menu Bar.

7. In the *Order name* field, if desired, **enter a new name** to use for this order.

8. If you are using Multisite, use **the Order site** drop-down list to **highlight and select** the print center to receive this order.

9. Under the *Print Options* section, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

    *Note: Use the **View Proof** and **Preview** buttons to preview the document before completing your order.*

10. If necessary, use the *Other Notes* field to **enter additional instructions** for the Print Center.

11. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the Requested Ship Date, and the preferred delivery method.

    Note: If a Ship To person has not been identified, click on the ... icon to open the Modify Shipping Information page and update Ship To information.

    Note: A Ship To contact can also be selected by clicking on one of the Add another Shipping Address buttons and selecting the appropriate person.

> ***Note***: *Additional shipping information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Shipping Instructions field.*

12. Use the *Billing Information* section to **enter the billing information** for the order.

> ***Note***: *If a Bill To person has not been identified, click on the ˳ icon to open the Modify Billing Information page and update Bill To information.*

> ***Note***: *A Bill To contact can also be selected by clicking on one of the Change to buttons and selecting the appropriate person.*

> ***Note***: *Additional billing information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Billing Instructions field.*

13. When the order is complete, **review** the estimated job cost and **select the Approval checkbox**.

14. Click the **Place Order** button.

> ***Note***: *If desired, use the Print Receipt link* *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Placing an Order on Behalf of Another User

Placing an order on behalf of another user is referred to as "Proxy." This permission is set by your system administrator.

1. From the *top menu*, click the **Proxy** link.

2. On the *Proxy Mode* page, use *the Place an Order for a User Search* section to **enter** the full or partial name of the user for whom you'd like to Proxy.

> ***Note***: *Click the Search button to be shown a list of all the users for whom you can proxy.*

3. **Highlight and click** the appropriate user row.

4. **Place the order as normal.**

Placing a Re-Order

1. From the *Ordering Home Page*, from the *Menu Bar*, click the **Orders** link.

2. Use the *Order Name* or *Order #* column to **locate** the appropriate order.

3. Click on the **Reorder** button to in the far right hand column.

4. Use the *Printing Options*, *Shipping Information*, and *Billing Information* sections to modify the order as necessary.

5. Click the **Place Order** button at the bottom of the page.

   ***Note*:** *If desired, use the Print Receipt link* *in the upper right hand corner of the page to print a hardcopy of the Order Receipt.*

Checking the Status of an Order

1. From the *Ordering Home Page*, from the *Menu Bar*, click the **Orders** link.

2. Use the *Status* column to identify the status of the order.

Managing Your Files

Manage Files allows you to organize the documents you have uploaded into WebCRD the same way Windows Explorer allows you to manage your other personal and business documents.

Creating a New Folder

1. From the *Menu Bar*, click on the **Manage Files** link.

2. Click the **Create Folder** link on the upper right hand side of the page.

3. **Enter the name of the new folder.**

4. Click the **Create** button.

Changing Your Default Folder

1. From the *Menu Bar*, click on the **Manage Files** link.

2. From the *Folders* section, use the *Default column* to **select the folder** you want to be your default folder.

3. Click the **Save** button at the bottom of the page.

Deleting a Folder

1. From the *Menu Bar*, click on the **Manage Files** link.

2. From the *Folders* section, use the *Delete column* to **place a checkmark next to the folder(s)** you want to delete.

    ***Note**: Only empty folders can be deleted.*

3. Click the **Save** button at the bottom of the page.

Moving a Document into a Different Folder

1. From the *Menu Bar*, click on the **Manage Files** link.

2. **Browse** to the location of the file to be moved.

3. Use the *Folder* drop-down list on the right had side of the page to **highlight and select the new folder**.

4. Click the **Save** button at the bottom of the page.

Changing the Retention Time of a Document

1. From the *Menu Bar*, click on the **Manage Files** link.

2. **Browse** to the location of the file.

3. **Click** on the item name link.

4. Under the *General Propertied* section, use the *Retention Period* row and click on the **Item expires on** calendar icon ▦.

5. **Browse** to the new expiration date and **click on the date**.

6. Click the **Save Page** button at the bottom of the page.

Managing Your Catalog Memberships

Allowing Other Members to Order on Your Behalf

1. From the *Ordering Home Page*, use the *Title Bar* menu and click on the **My Profile** link.
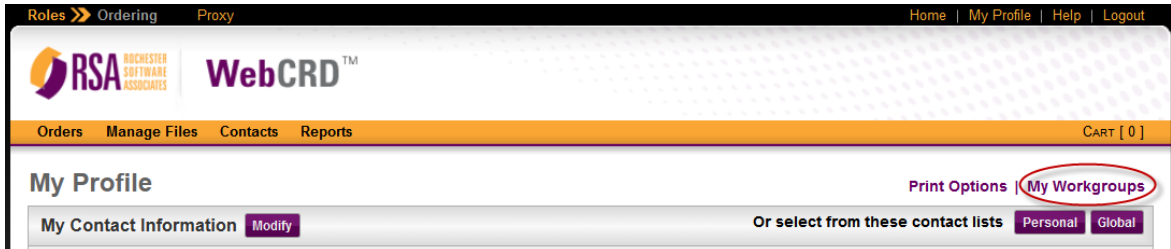
2. At the top of the *My Profile* page, click on the **My Workgroups** link.

3. From the My Workgroups page, use the *Allow others to order for me?* column to **select** the other Catalog members who can place orders on your behalf.

4. At the *bottom of the page*, click the **Save** button.

Recommending Catalog Items

1. From the *Ordering Home Page*, click the **Manage Files** link.

2. **Browse** to the location of the item to be recommended.

3. Use the *Folder* dropdown to **select the Shared folder** for which to recommend the document or item.

4. Click the **Save** button.