
RSA WebCRD™ **Getting Started**

User Guide



Getting Started With WebCRD

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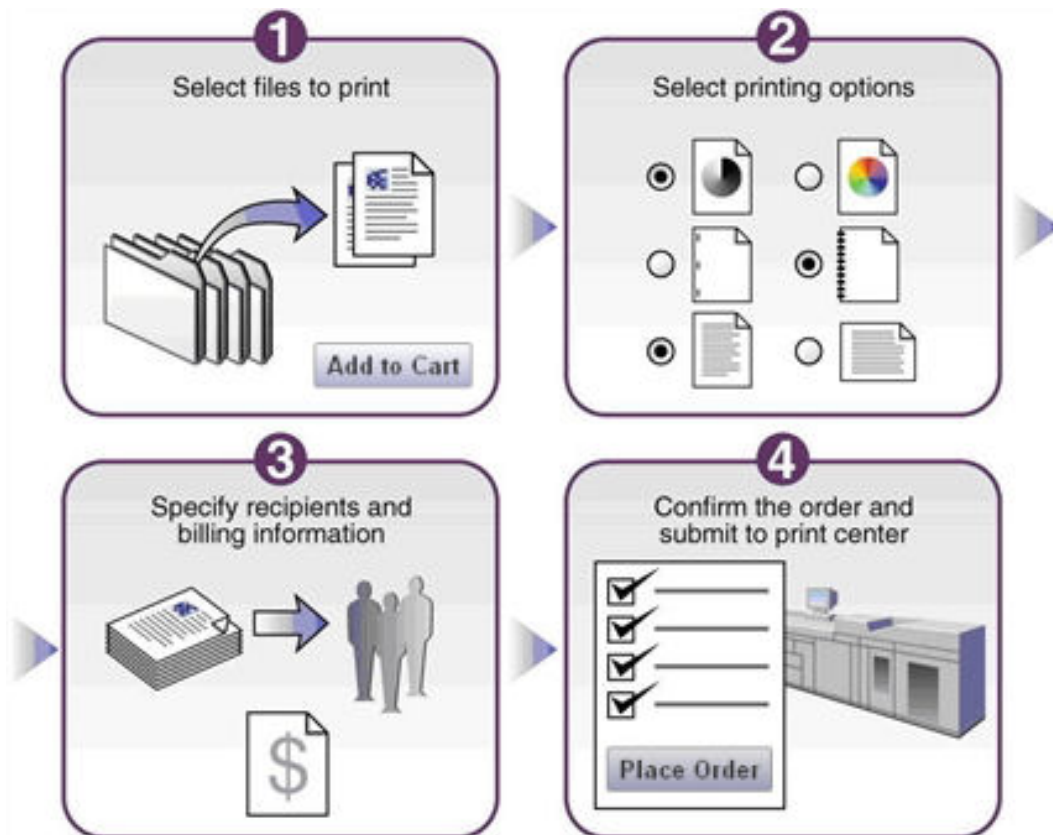
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Introduction to WebCRD

WebCRD™ is a browser-based ordering and production application, enabling users to order, manage, reorder documents and items at one or more designated print centers, using the Internet or Intranet.

WebCRD supports the entire ordering process, from order placement and file submission through production, including direct submission to production printers with detailed job tickets. For administrators, WebCRD provides management tools and processes to ensure that jobs are printed and produced in a timely and controlled manner.

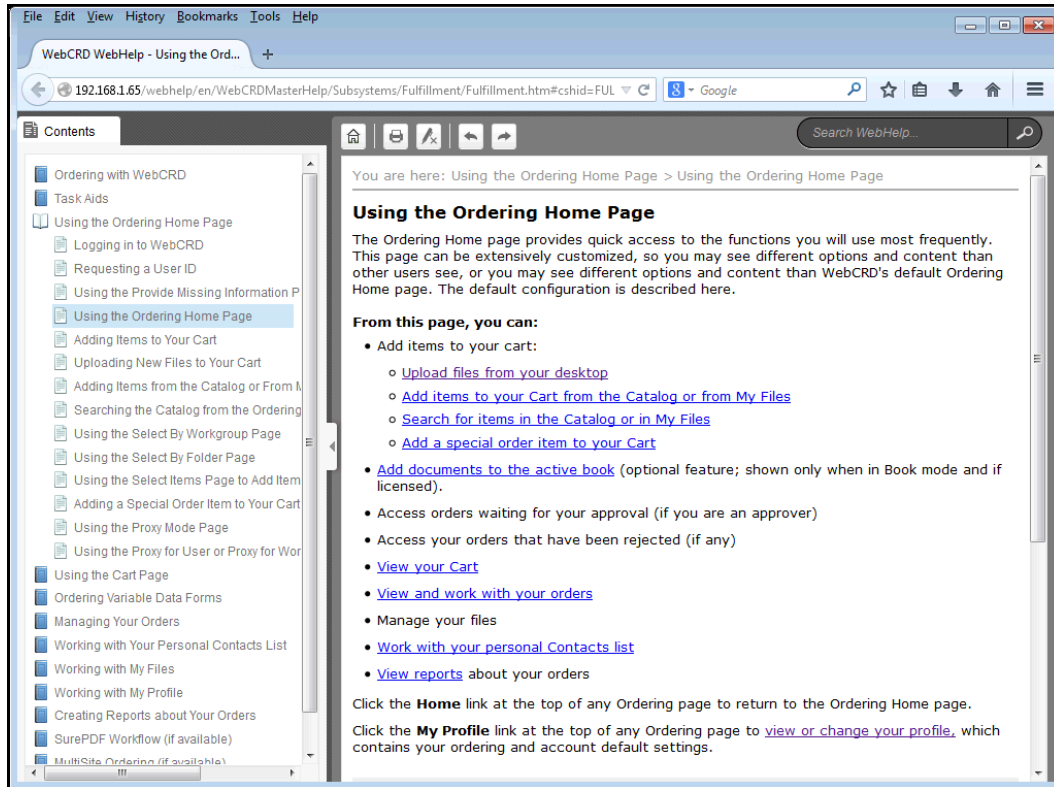


Using Online Help

The **Help** link at the top of each page opens online help in either a new window or a new tab of your browser, depending on your configured browser setting for that action.

- The online help window shows a topic that explains the current application page (such as the Ordering Home page or the Cart page).
- You can click toolbar buttons at the top of the Help window to navigate to other topics, search for information, and print topics.
- If you are a WebCRD System Administrator, you can access help information for all WebCRD modules using any Help link in the **Administrator** module; otherwise you will see help information only for the module that you are currently using (such as Ordering, Production, Approval, and so forth).
- If you are a WebCRD System Administrator, you can also access all help information in PDF format on the Documentation page in Administrator (on the System Administration page, scroll down and click **WebCRD Documentation, License**, and then click **View System Documentation**).

Sample Online Help Window



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Logging in to WebCRD

To log in to WebCRD:

1. Open a supported web browser and type the URL address for the WebCRD Login page. Your WebCRD System Administrator will tell you the URL address to access the Login page for your site.

Note: A message informs you if your current browser cannot be used with WebCRD, and the Login page is not displayed. You may also see a message on the Login page if the browser you are using is not on the current list of certified browsers; however you may choose to continue using WebCRD with this browser. This may occur if your browser accepts automatic updates. Typically, WebCRD will work with a newer browser version.

2. If the Domain drop-down is displayed, select your domain from the list.
 - Select **Local Account** to log in using WebCRD's local authentication.
 - Select **Standard Account** or another domain name to log in using your standard application User ID and password.
3. Type your User ID and password, and then click **Log In**.

The Ordering Home page is displayed (for new users); or for returning users, the Home page of the last WebCRD module you used is displayed (such as Ordering, Approval, Production, and so forth).

Note: If your account is missing any required contact information, you will be asked to fill in the required information before continuing. This may occur if your WebCRD System Administrator has recently made changes to require specific information for order placing.

Logging out of WebCRD

Click **Logout** in the title bar at the top of any page.

Note: You are automatically logged out if there is no activity for 30 minutes. This time interval is configurable and may be different at your location.

Placing an Order using the Ordering Home Page

Note: Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. A message informs you if your Cart is full when you try to add more items.

Add items to your Cart from the Ordering Home page using any of these methods:

- Upload one or more files from your desktop.

Note: WebCRD accepts any type of file. Your print center will determine the types of files it will accept (such as Word, Excel, PageMaker, and so forth). The valid file extensions are shown in the **Upload A File** area of the page.

Online proofs are available immediately on your Cart page for uploaded PDF files, or for supported native-format file types if optional CentralPDF workflow software is available.

- Add items from the Catalog or add your previously-ordered items from My Files.
- Add a special order item (for example, a hardcopy document).

Uploading new files to your Cart

If available for your account, uploading one or more new files is one way to add items to your Cart. There are several ways that you can select files to upload.

To upload one or more files from a single folder:

1. Click **Choose Files** on the Ordering Home page to display the Open or Choose File dialog box.
2. Navigate to the folder containing the file(s) you want.
3. Select one or more files, and then click **Open**.
Use standard selection methods for your computer to select multiple files (for example, shift-click and ctrl-click).
4. Click **Add to Cart** (or **Add to Book**, in Book mode) to upload the file(s), add them to your Cart, and display the Cart page.

To upload one or more files using drag and drop:

1. Navigate to the folder on your computer containing the file(s) you want.
2. Select one or more files.
Use standard selection methods for your computer to select multiple files (for example, shift-click and ctrl-click).
3. Drag the files to the Ordering Home page, and drop them on the **Choose File** button.

4. Click **Add to Cart** (or **Add to Book**, in Book mode) to upload the file(s), add them to your Cart, and display the Cart page.

To upload one or more files from multiple folders:

1. Click **Multiple Files?** on the Ordering Home page to display the Upload Multiple Files page.
2. Click **Choose Files** to display the Open or Choose File dialog box.
3. Navigate to the folder you want, select one or more files, and then click **Open**.
Use standard selection methods for your computer to select multiple files (for example, shift-click and ctrl-click).
4. Repeat steps 2 and 3 until you have selected all files.

Note: Each time you select files, those files are grouped together on the Selected Files list.

5. If you want to delete a group of files from the upload, click **Delete** for that group in the Selected Files list.
6. Click **Add to Cart** (or **Add to Book**, in Book mode) to upload all files in the Selected Files list, and display the Cart page.

Adding Catalog items or items from My Files to your Cart

If configured at your location, you can add items to your Cart from the Catalog or from My Files. Catalog items may have a fixed price or use a price tier (pricing can vary according to the quantity ordered). Click the Price link (if available) to display price tier information in a pop-up dialog box.

To add items to your Cart from the Catalog or from My Files:

1. Click **Advanced Search** on the Ordering Home page to select and/or search for items by Catalog, Folder, and Item.
2. If necessary, display the Select Items page by typing additional search criteria and clicking **Search**, or click on a folder name.
3. On the Select Items page, type or select quantities for one or more items, and then click **Add All to Cart** (bottom of page).

The **Cart** link in the notifications area is updated to show the number of (unique) items currently in your Cart.

The specified quantity is added for each recipient on the Cart page. (Multiple Recipients) is shown in this case, and the total quantity added to the Cart is the specified quantity * number of recipients.

4. Add more items to your Cart if desired. Click a link in the navigation path at the top of the page to see files in another Catalog or folder.
5. When done adding items, click the **Cart** link in the notifications area to display the Cart page.

How to search for items to add to your Cart

Searching from the Ordering Home page

If configured at your location, several options may be available for searching for Catalog items (or for your personal items in My Files) from the Ordering Home page. Your WebCRD System Administrator configures the ordering and search options that are enabled on your Ordering Home page.

- Search Catalog - by Item Description
- My Files - search for your personal items by Item Description
- Search Catalog - by category keyword (metadata)
- Search bar - search for an item by Item Description, Form Number, and/or any active metadata category field. Type one or more full or partial search terms in the Search field.

Searching from the Select Items, Select By Folder, or Select By Workgroup pages

The Item Search bar (available on the Select Items, Select By Folder, or Select By Workgroup pages) contains a single Search field that can be used to search for an item by Item Description, Form #, and/or any active metadata category field. Type one or more full or partial search terms in the Search field (separated by spaces), and then click **Search**, or press **Enter** on your keyboard to display matching items in the list.

Below the Search field, you can click **Show Advanced Search Criteria** to display specific field inputs for all available search criteria, including Created dates and Expiration date (for your files). Click **Remove Advanced Search Criteria** to hide those fields and clear the advanced search criteria.

Before or after searching, you can make a selection from the Rows Per Page drop-down list to show fewer or more items on the page; or select a Sort By option (Item, Form #, Date, Location, A-Z, and Z-A).

Adding a Special Order item to your Cart

If configured at your location, you can add a special order item to your Cart. Use this option when you do not have a file that can be uploaded.

Examples of special order documents/items include:

- Hard-copy documents that you will deliver to the print center (for copying, scanning, archiving, etc.).
- Files on a CD or other external storage media that you will deliver to the print center.
- Files that your print center does not accept for uploading.

To add a special order item to your Cart:

Click the **Go** button in the Special Orders section of the Ordering Home page. A new special order item is added to your Cart, and the Cart page is displayed so that you can configure the special order item.

Using the Cart page

Note: Use the Cart page to specify an optional order name, item information for each item, shipping information, and billing information for your order.

Note: Depending on the configuration of your account, some functions of the Cart page may be locked (not changeable) or hidden, such as account codes, or Shipping (recipient) and/or Billing information. The standard configuration is described here.

To place your order:

1. If desired, provide an optional name for your order or select a different site for the order.

Note: If your location requires you to provide an order name, enter it in the pop-up dialog box, and then click **Continue**.

2. Configure the Print Options for each item in the order (add more items to your Cart if desired).
3. Select the desired ship date or service level for the order (use either the pop-up calendar or the Service Level drop-down list, depending on the method enabled for your site).
4. Select quantities and the shipping method for each Shipping Address (recipient) .
5. Review Billing Information (enter account codes if necessary).

You can also click the **Estimate** link to see the Order Charges page if desired.

6. Click **Place Order** to place your order.

Note: If the order cost is displayed (configurable for each site), it is automatically updated whenever you make any change that may affect the price, such as quantity, shipping date or service level, print options, site selection, and adding recipients or more items. A brief message is shown on the bottom of the screen while changes are being saved and the order cost is updated.

Placing your order

To place the order (submit it to the print center for processing or submit it for approval):

1. Review your order carefully on the Cart page before submitting it to the print center or for approval (if optional Approval Authority is in use at your location).

Note: Once you place the order, you cannot modify or cancel it. If you need to change an order that you have placed, contact your approver or your print center.

2. Click **Place Order** to submit the order to the print center or for approval.
 - Confirm the order cost, and then click **Place Order** on the confirmation dialog box to submit the order; or click **Cancel** to return to the Cart page.
 - After you place the order, the Order Submitted page is displayed. You can print the order receipt if desired.

If optional Approval Authority is in use at your location, additional approval of your order may be required (based on your membership in an approval group and/or usage of account codes that are linked to an approval group). When you submit the order, a message informs you if the order was submitted for approval or submitted directly to the print center.

To save your Cart without placing an order:

WebCRD automatically saves changes you make on the Cart page (such as print options, quantities, due dates, etc).

Your Cart, with all saved items and selections, is available at any time by clicking the **Cart** link in the Notifications area on Ordering pages.

You can start a new Cart by clicking **Start a New Cart** at the bottom of the page. You have the option to save your current Cart (your order is available from the Orders list). If you do not save your current Cart, the order is canceled.

Placing an Order with SurePDF

SurePDF can be used on either Windows or Macintosh computers. Ensure that you have downloaded and installed the SurePDF print driver for your operating system.

Using SurePDF with Windows

To send a print job to the print center using SurePDF (Windows):

Note: This information applies to the SurePDF 5 workflow.

1. Create your document. You can use any application that supports PostScript printing.
2. Choose **Print** from your application's File menu.
3. Select the SurePDF printer from the Printer drop-down list (the actual printer name is specific to your location; the default name is **Send to WebCRD**).
4. Click **Print** on the Print dialog box.

The progress bar is displayed as the document is being converted to PDF and transmitted to WebCRD.

To log in to WebCRD to configure and submit the order:

1. On the WebCRD Login page, type your User ID and password, and then click **Log In**.
2. If you already have documents in your Cart, you can either add this document to your current Cart or start a new Cart (if your Cart is empty, the Cart page is displayed automatically and these two choices are not shown).
 - Select **My Cart** to add this document to your current Cart (default selection); or Select **A New Cart** to add this document to a new Cart (your current Cart contents, if any, are saved).
 - Click **Checkout**.

Note: Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. A message informs you if your Cart is full when you try to add more items.

If your Cart is full, you can select from these options:

- Go to the existing Cart without ordering this file
 - Create a new Cart and order this file (Your existing Cart will be saved and can be found on the Orders page.)
 - Add to Book (Note: only shown if optional Book feature is installed)
3. Select print options on the Cart page, and submit the order.

Using SurePDF With Macintosh

To send a print job to the print center using SurePDF (Macintosh):

Note: This information applies to the SurePDF 5 workflow.

1. Create your document. You can use any application that supports PostScript printing.
2. Choose **Print** from your application's File menu.
3. Select the SurePDF printer from the **Printer** drop-down list (the actual printer name is specific to your location; the default name is **Send to WebCRD**).
4. Click **Print** on the Print dialog box.

The progress bar is displayed as the document is being converted to PDF and transmitted to WebCRD.

To log in to WebCRD to configure and submit the order:

1. On the WebCRD Login page, type your User ID and password, and then click **Log In**.
2. If you already have documents in your Cart, you can either add this document to your current Cart or start a new Cart (if your Cart is empty, the Cart page is displayed automatically and these two choices are not shown).
 - Select **My Cart** to add this document to your current Cart (default selection); or Select **A New Cart** to add this document to a new Cart (your current Cart contents, if any, are saved).
 - Click **Checkout**.

Note: Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. A message informs you if your Cart is full when you try to add more items.

If your Cart is full, you can select from these options:

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 - Create a new Cart and order this file (Your existing Cart will be saved and can be found on the Orders page.)
 - Add to Book (Note: only shown if optional Book feature is installed)
3. Select print options on the Cart page, and submit the order.

Notes



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