RSA WebCRD™

Getting Started

User Guide

Getting Started with WebCRD

Document Version: V8.1-3

Software Version: WebCRD V8.1.3

June 2011

© 2001 - 2011 Rochester Software Associates, Inc. All Rights Reserved.

AutoFlow™, AutoStock™, CentralPDF™, MultiSite™, QDirect™, SurePDF™, SurePreview™, WebCRD™, and WebCRD Dynamics™ are trademarks of Rochester Software Associates, Inc. All non-RSA brands and product names mentioned herein are trademarks of their respective owners.

Disclaimer:

Rochester Software Associates, Inc. (RSA) makes no warranty with respect to the adequacy of this documentation, programs, or hardware which it describes for any particular purpose or with respect to its adequacy to produce any particular result. In no event shall RSA be held liable for special, direct, indirect, or consequential damages, losses, costs, charges, claims, demands, lost profits, fees or expenses of any nature or kind.

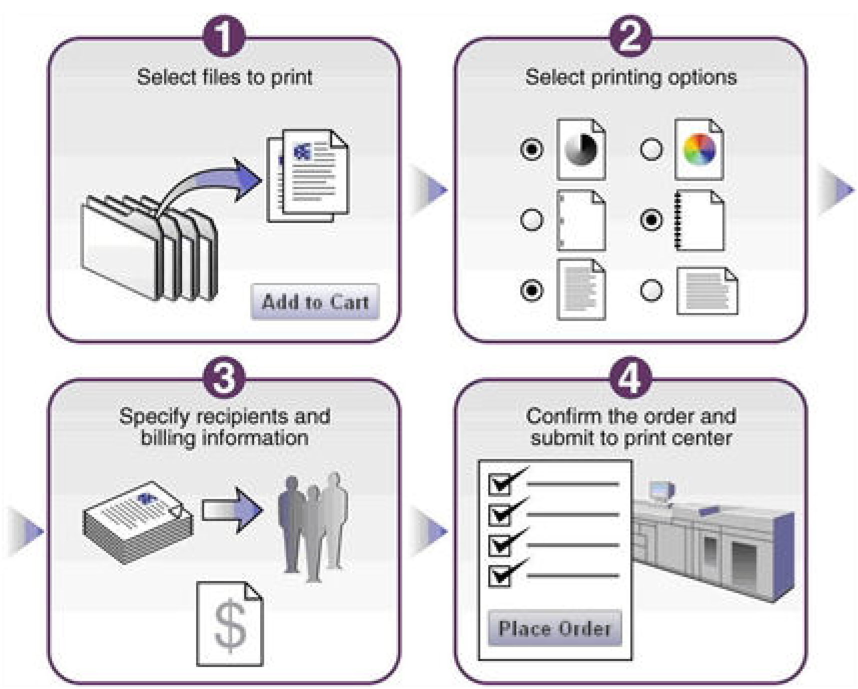
Contents

Chapter 1: Introduction to WebCRD

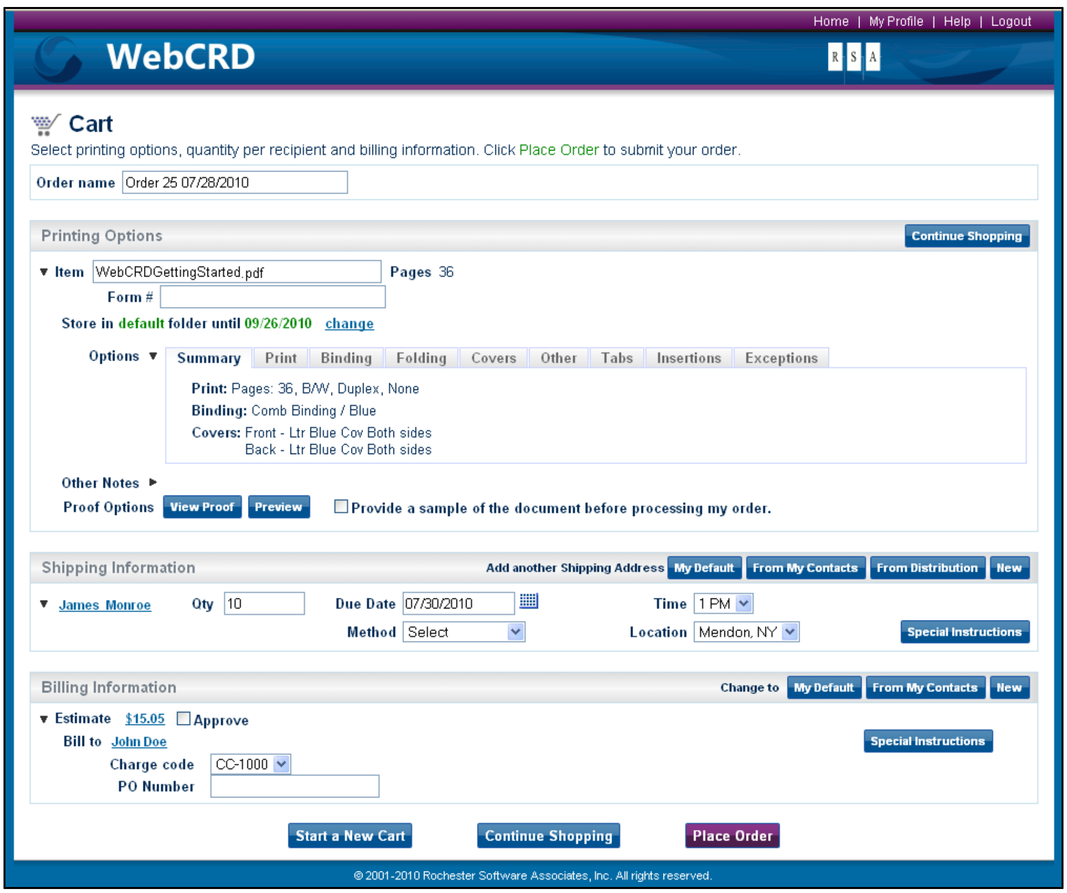
Introduction to WebCRD

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.




Home | My Profile | Help | Logout
WebCRD™ Web-to-Print Solution
R S A
Orders Manage Files Contacts Reports
CART [0]
PRINTING MADE EASY
Ordering from Document Services has never been easier. Upload a File from your desktop, search for personal items in My Files or search the Catalog.
Upload A File
Select a file from your desktop.
doc, xls, pdf, bm2, bmt, gif, jpg, png
Browse...
Multiple Files?
Go
Search Catalog
Search catalog by description for items to order.
Advanced Search
Go
My Files
Search your personal file cabinet for items to order.
Advanced Search
Go
Special Orders
Order custom prints from a hardcopy, CD-ROM, etc.
Go
© 2001-2010 Rochester Software Associates, Inc. All rights reserved.


Home | My Profile | Help | Logout
WebCRD
R S A
Cart
Select printing options, quantity per recipient and billing information. Click Place Order to submit your order.
Order name Order 25 07/28/2010
Printing Options
Continue Shopping
Item WebCRDGettingStarted.pdf Pages 36
Form #
Store in default folder until 09/26/2010 change
Options Summary Print Binding Folding Covers Other Tabs Insertions Exceptions
Print: Pages: 36, B/W, Duplex, None
Binding: Comb Binding / Blue
Covers: Front - Ltr Blue Cov Both sides
Back - Ltr Blue Cov Both sides
Other Notes
Proof Options View Proof Preview
Provide a sample of the document before processing my order.
Shipping Information
Add another Shipping Address My Default From My Contacts From Distribution New
James Monroe Qty 10 Due Date 07/30/2010 Time 1 PM
Method Select Location Mendon, NY
Special Instructions
Billing Information
Change to My Default From My Contacts New
Estimate $15.05 Approve
Bill to John Doe
Special Instructions
Charge code CC-1000
PO Number
Start a New Cart Continue Shopping Place Order
© 2001-2010 Rochester Software Associates, Inc. All rights reserved.

Certified Client Requirements for WebCRD and SurePDF

WebCRD™ is a server-based application that is accessible via a Web browser. RSA strongly recommends that users maintain the most up-to-date client software versions.

WebCRD Certified Client Requirements

WebCRD V8.1.3 has been QA-tested with the following client configurations. Other configurations may function correctly but customers should be aware that non-certified configurations may be problematic. Customers using non-certified configurations should take care to test and verify their configuration before deploying to end users.

Platform	**Browser**	**Additional Software (to view proofs/previews)**
Windows Vista, 7	Internet Explorer 8 Firefox 3	Adobe Acrobat 8** or 9, or Adobe Acrobat Reader 8.1** or 9 and Adobe Flash Player 9** or 10
Windows XP	Internet Explorer 6*, 7, or 8 Firefox 3	
Mac OS X	Safari 3, 4 Firefox 3	

* Internet Explorer 6 will not be supported in future releases.

** These versions are supported but not currently tested.

SurePDF Certified Client Requirements

SurePDF™ is an optional module for WebCRD that enables print job submission from the user's application directly into WebCRD. It has more specific requirements than WebCRD alone.

SurePDF has been QA-tested with the following client configurations. Other configurations may function correctly but customers should be aware that non-certified configurations may be problematic. Customers using non-certified configurations should take care to test and verify their configuration before deploying to end users.

Platform	**Requirements**	**Additional Software (to view proofs/previews)**
Windows Vista, 7	Internet Explorer 8 1 GB RAM 50 MB disk space	Adobe Acrobat 8** or 9, or Adobe Acrobat Reader 8.1** or 9 and Adobe Flash Player 9** or 10
Windows XP	Internet Explorer 6*, 7, or 8 512 MB RAM 50 MB disk space	
Mac OS X (10.5 and 10.6)	Safari 3.1, 4 512 MB RAM 105 MB disk space	

* Internet Explorer 6 will not be supported in future releases.

** These versions are supported but not currently tested.

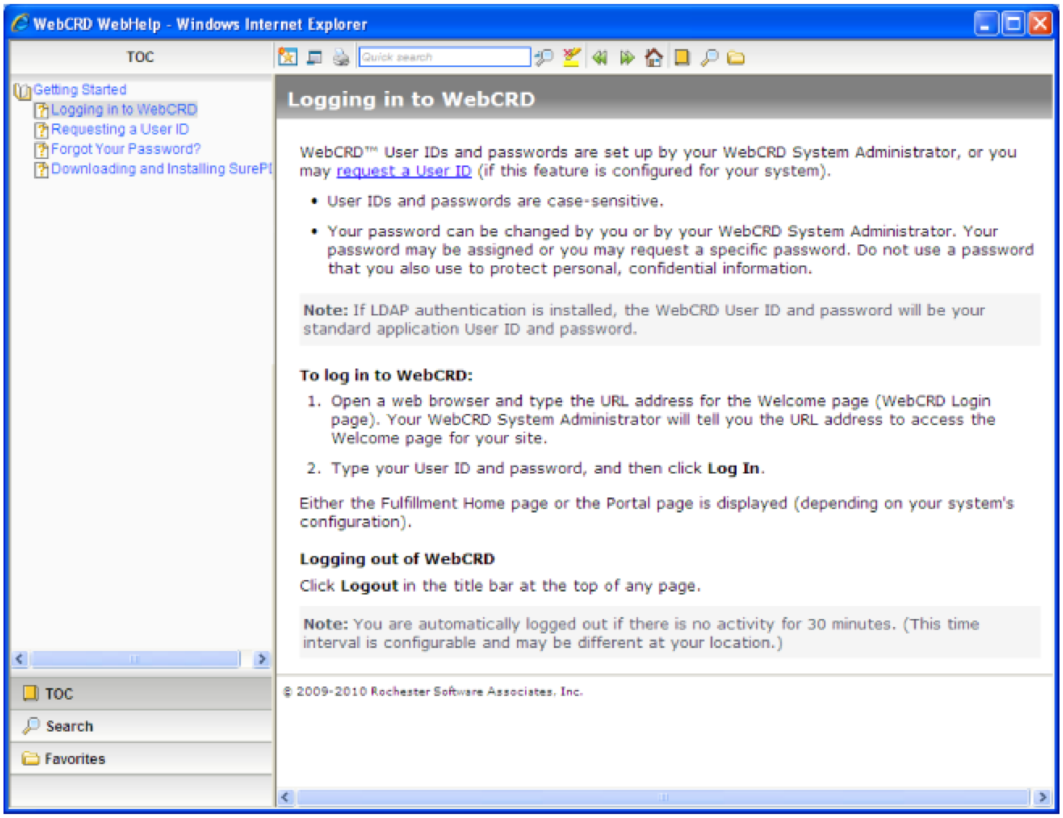
Chapter 2: Getting Assistance/General Tips

Using Online Help

The Help link at the top of each page opens either a PDF user guide in a new window or online help in a new window.

- When you click a **Help** link, you will see a topic that explains the current application page (such as the Ordering Home page or the Cart page).
- You can click the tabs at the lower left of the Help window or click toolbar buttons at the top of the Help window to navigate to other topics, search for information, print topics, add topics to your Favorites list, and so forth.
- If you are a WebCRD System Administrator, you can access help information for all WebCRD modules using the Help link on the **Administrator | Documentation** page; 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 access all help information in PDF format on the **Administrator | Documentation** page.

Sample Online Help Window



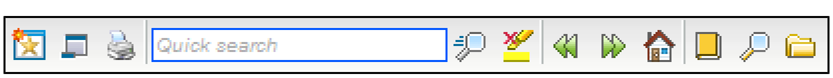
What's on the help window

Tabs (lower left)—click to change what is displayed in the left pane

- Click the **TOC** tab to display books and topics in the left pane. Click a book to open it and see the topics in the book. Click a topic to display it.
- Click the **Search** tab to display the Search pane, in which you can type a search term. A list of topics matching the search term are displayed in the Search pane; you can then click a topic to display it.
- Click the **Favorites** tab to display your saved favorite topics (saved for each user ID on a specific computer).

Toolbar buttons

Point to a button on the toolbar to see a tool tip explaining its function.



Button	Explanation
	Add to Favorites (saved for each user ID on a specific computer).
	Toggle Navigation Pane (Show or Hide).
	Print the current topic.
	Quick Search - search for the text you type in the Quick search bar in this topic (**searches on this page only**). Use the Search pane to search for information in all topics.
	Remove search highlighting from topics after a search.
	Go back to the previous topic.
	Go forward to the next topic (use after you have clicked Back).
	Display the home page of the help file (usually an introduction topic).
	Display the Table of Contents (same as clicking the TOC tab).
	Display the Search pane (same as clicking the Search tab).
	Display the Favorites pane (same as clicking the Favorites tab).

Using the Search pane

1. Display the Search pane if necessary (click the **Search** button on the toolbar or click the **Search** tab).
2. Type a search term in the search box.
   - If the search term contains multiple words, enclose it in double quotes. Example: "proxy order"
   - If you specify multiple words without double quotes, each word is considered a separate search term and results include topics with any of the search terms.
3. Click **Search** to start the search. Topics with matching terms are listed in the Search pane.
4. Click a topic in the search pane to display it. Search terms are highlighted in displayed topics.
5. If desired, click the **Remove Search Highlighting** button on the toolbar to remove highlighting of the search terms.

Page Navigation Tips

The title bar at the top of every WebCRD page provides links to standard WebCRD functions, such as Roles (if authorized), Proxy (if authorized), Home, My Profile, Help, and Logout.

Note: Your User ID is displayed in your browser's title bar.

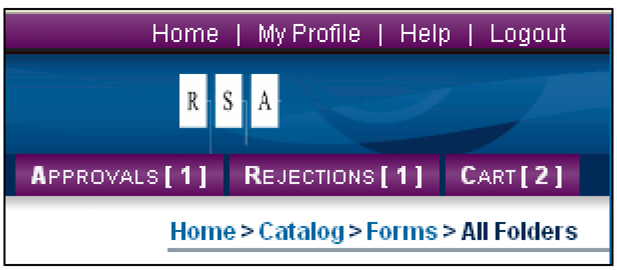
- **Roles** menu: If you are authorized to access other functions, the Roles menu is shown in the upper left of the page. The links you see under the Roles menu are configured by your WebCRD System Administrator.
- **Proxy** link: If you are authorized to use Proxy Order to place orders for other users, the **Proxy** link is shown at the top of all WebCRD pages.
- **Home** link: return to the Home page for your current Role (this is the Ordering Home page, when you are in Ordering). You can also click the banner logo at the top of any page to return to the Home page for your current Role.
- **My Profile** link: view your account's default information.
- **Help** link: open online Help or access PDFs of user documentation.
- **Logout** link: log out of WebCRD. You are automatically logged out after an interval of inactivity, such as 30 minutes. This interval is configurable by your

WebCRD System Administrator and may be different for your organization. Your Cart is automatically saved when you click **Logout** or if you are logged out automatically.

Pages may also contain the following navigation, search, and sort functions:

- Notifications area: Available on Ordering pages. **Approvals**: number of orders waiting for approval (if you are an approver); **Rejections**: number of orders that have been rejected (if any); **Cart**: number of items in your Cart. Click one of the links to go to Approvals, Rejected Orders, or to your Cart.

- Navigation path: Available when ordering from the Catalog or from My Files; or in Manage Files. Click a link in the navigation path to see files in another Workgroup or folder. Click **Catalog** to go to the main Catalog page; or click **Manage My Folders** (when managing files) or **My Files** (when ordering) to see the main page for your files. Click **Home** to go to the Ordering Home page.



- Search bar: search for items on the current page.
  - Typical fields include Item, Form #, Description, optional metadata fields, and dates. Keyword search for metadata fields may be available (Generic keyword search and Specific keyword search) if configured for your system.
  - Make a selection from the Rows Per Page drop-down list to show fewer or more items on the page.
  - Sort the list by clicking the sort arrows next to the column headers in a list. The arrow direction indicates how the list is currently sorted, in ascending or descending order.

Using Proxy Order (when available)

If you are authorized to order for other users, the **Proxy** link is shown at the top of all WebCRD pages.

- If you are an *unrestricted* order placer, you can order for all users.
- If you are a *limited* order placer, you can orders only for those users who have specifically authorized proxy ordering.
- Proxy order only allows access to Ordering and Workgroup Roles (it does not allow access to all Roles that a user may have, such as Approval, Production, or Administrator).
- Proxy order starts a new Cart. The user's current Cart (if any) is saved first.
- When you proxy for another user, you keep your own skin (colors and content links that may be configured for you on the Ordering Home page). Although you do not see the user's Ordering Home page configuration, you still have permission to access all of their content (use Advanced Search if necessary).

To order for another user:

1. Log in to your WebCRD account.
2. Click the **Proxy** link at the top of any WebCRD page.

   Note: If you don't see the **Proxy** link, your WebCRD System Administrator needs to enable you as an order placer.

3. On the **Select User** page, select the user for whom you want to order.

   (Local) or (Domain Name) designation may be shown after the User ID.

   Note: If you don't see any users here, either you are not an authorized order placer for any Workgroup, or no other Workgroup members have authorized ordering (on the My Profile page in their account).

4. Add items to the user's Cart. The text at the top of each page reminds you that you are acting on behalf of another user, using all account defaults of that user.

   Note: Emails about the order are sent to the user, not to you.

To switch to another user:

1. Click **Switch User** at the top of any page.
2. Select another user.

To end Proxy Order and return to your own account:

Click **Exit** at the top of any WebCRD page.

Using the Search Bar

The Search bar is available on many pages. Most pages contain similar search fields, such as Item, Form #, start and end dates, and so forth. Some pages may contain search fields that are specific to that page or function, such as User ID or Last Name.

To use the Search bar, make selections and/or type search criteria in the available fields, and then click **Search** , or press **Enter** on your keyboard to display matching items in the list.

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.

You can also sort the list of items by clicking the sort arrows next to the column headers in a list. The arrow direction indicates how the list is currently sorted, in ascending or descending order.

Search reminders

- The search function is case-sensitive.
- The underscore character (_) is a wildcard character that matches any single character in search fields.
- The percent character (%) is a wildcard character that matches any number of characters in search fields.
- Keyword searching for items with metadata may be available for searching Workgroups/Folders, if configured at your location. Your WebCRD System Administrator will inform you of the metadata keywords that are available.
- Metadata fields can be configured as searchable, even if not displayed. Use Generic Keyword Search to search non-displayed metadata fields. Your WebCRD System Administrator configures the search and display attributes of each metadata field.
- Use Generic Keyword Search to search all metadata fields for the terms you specify.
- Use Specific Keyword Search to search specific metadata fields for specific terms.

To search for an item:

1. If available, select the folder to search or select ALL to search all folders (all folders are searched automatically if you are on the Folders page).
2. Type all or part of an item name, all or part of a form number, or purge days. (Item scheduled to be purged within the number of days are displayed.)
3. Select date ranges (upload dates).
4. Click **Search**, or press **Enter** on your keyboard to display the items matching all criteria in either the selected folder or all folders.

To search for items using metadata:

1. Click either the **Specific Keyword Search** tab or the **Generic Keyword Search** tab.
2. Type search criteria in the metadata search fields.
   - For metadata searching, you must know the appropriate metadata keywords that have been applied to the files or items. Metadata keywords are applied using Document Import. Your WebCRD System Administrator should provide users a list of valid metadata keywords that can be used.
   - For Generic Keyword Search, all entered keywords are ANDed together.
   - Metadata fields may be searchable using Generic Keyword Search even if they are not displayed on the Specific Keyword Search tab (fields can be marked searchable but not displayed).
   - For Specific Keyword Search, you must type the correct metadata keyword(s) into the correct field(s) to obtain a result.
3. If desired, type additional search criteria in the Search bar (Form #, etc).
4. Click **Search** to display matching all criteria.

Chapter 3: Getting Started with WebCRD

Logging in to WebCRD

WebCRD™ User IDs and passwords are set up by your WebCRD System Administrator, or you may request a User ID (if this feature is configured for your system).

- User IDs and passwords are case-sensitive.
- Your password can be changed by you or by your WebCRD System Administrator. Your password may be assigned or you may request a specific password. Do not use a password that you also use to protect personal, confidential information.

Note: If LDAP authentication is installed, the WebCRD User ID and password will be your standard application User ID and password. Your WebCRD System Administrator will let you know if this is available at your location.

To log in to WebCRD:

1. Open a 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.
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 application you used is displayed (such as Ordering, Approval, Production, and so forth).

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.

Requesting a User ID

If you don't have a WebCRD User ID, you can request one (if this feature is configured for your system).

To request a User ID:

1. Click the **New User Registration** link on the WebCRD Login page.
2. Type information on the User Registration form, and then click **Register**. Required information is indicated by asterisks.

   Your User ID and a temporary password are sent to your email account.
3. Click **Return to Login Page** to display the WebCRD Login page again.
4. After you receive your temporary password, log in and go to **My Profile** to change your password.

Forgot Your Password?

If you forget your WebCRD password, you can request that the system send you a temporary password so that you can log in (if this feature is configured for your system).

To request a new password:

1. Click the **Forgot your password?** link on the WebCRD Login page.
2. Type your User ID and email address, and then click **Retrieve Password**.
   - The email address must match the address on file for the User ID you specified (case-insensitive).
   - If you have permission to change your password, a temporary password is sent to that email address.

- If you do not have permission to change your password, your actual password is sent to that email address.

3. Click **Return to Login Page** to display the WebCRD Login page again.
4. If you have permission to change your password, log in and go to **My Profile** in Ordering to change your password from the temporary password.

Downloading and Installing SurePDF

SurePDF software allows you to upload files to WebCRD using a **File | Print** workflow from applications running on your local computer (for example, from Microsoft Word).

Downloading the SurePDF client installer file

Download the appropriate SurePDF client installer file for your operating system.

To download the SurePDF client:

1. Log in to an account on your computer with administrator rights (XP, Mac) or with UAC enabled (Vista).
2. Navigate to the WebCRD Login page.
3. Click the SurePDF Download link to display the SurePDF Print Driver download page.

   Note: The download link text may be customized for your location.

4. On the Get the SurePDF Print Driver page, click the link for your operating system to download the appropriate client installer file. Save the file to a location such as your desktop.
5. Click **Return to Login Page** to display the WebCRD Login page again.

Installing SurePDF - Windows XP and Vista

Note: For Windows XP, the account used to install SurePDF must have administrator rights. For Windows Vista, the account used to install SurePDF must have UAC enabled. The account itself is not required to have administrator rights, but the administrator password may be required during installation. Enable UAC for an account using the Control Panel, then restart Windows.

To install the SurePDF client software:

1. Open Windows Explorer, locate the file you downloaded, and double-click it to start the installation process.

2. Follow the prompts on your screen to complete the installation process.
3. Open your Printers folder and verify that the SurePDF printer is listed. The specific name of the printer will be customized for your server.
4. Open any application on your computer that supports PostScript printing and verify that the SurePDF printer is available from the **File | Print** dialog box.

Installing SurePDF - MAC

Note: The account used to install SurePDF must have administrator rights.

Alert: Adobe Acrobat (either Reader or the full Acrobat product) must be installed and opened at least once (to activate it) before installing SurePDF, or the installation will fail.

To install the SurePDF client software:

1. If the installation does not start automatically after downloading the file, locate the file you downloaded, and double-click it to start the installation process.
2. Follow the prompts on your screen to complete the installation process.
3. Open your Printers folder and verify that the SurePDF printer is listed. The specific name of the printer will be customized for your server.
4. Open any application on your computer that supports PostScript printing and verify that the SurePDF printer is available from the menu.

Chapter 4: Placing Orders

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):

1. Create your document. You can use any application that supports PostScript printing.
2. Choose **Print** from your application's File menu and select the SurePDF printer from the Name drop-down list. The actual printer name is specific to your location.
3. Click **OK** on the Print dialog box. The PDF file is displayed in a new window after the Adobe PDF file is created (this may take a few moments).
4. View the online proof of the document and check for correctness.

   Note: If desired, you can click the **Print** button on the PDF toolbar to print a hard copy of the PDF file.

5. Click one of the following to continue:
   - **Accept** to accept the proof and continue with your order after you have reviewed the PDF and are satisfied with the proof. After clicking **Accept**, the WebCRD Login page is displayed.
   - **Cancel** to cancel the order if you notice an issue with the proof and want to correct your file before sending it for printing.

> **Note:** The **Save** button allows you to save the preview as a pair of files: an encrypted ".pdfz" file and an XML file. These two files must be kept together. You can double-click on the .pdfz file to open the Preview window again so that you can submit this file for processing at a later time. You can submit your document from another computer that has the same PDF JobReady client installed, but you will not be able to preview it.

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**.

   > **Note:** If you have used SurePDF and logged in to WebCRD within the past 30 minutes, your User ID and password are displayed automatically on the Login page.

2. Select an Add option for the document:
   - My Cart: add this document to your current Cart.
   - Saved Order: add this document to a saved order (select the order from the drop-down list).
   - A New Cart: add this document to a new Cart (your current Cart contents, if any, are saved).
3. Click **Checkout**. The Transmitting File page may be displayed briefly as the PDF file is uploaded from your computer to the WebCRD server.

The Cart page is displayed automatically when the file transfer is complete. Select print options and submit the order as usual.

To add more files to this order:

Click **Continue Shopping** after selecting an Add option. The current file is uploaded to the WebCRD server. You can then close the Adobe JobReady window and upload another document.

---

* If you are using the SurePDF workflow on Windows, ensure that all other Internet Explorer windows are closed first (if either SurePreview or Help display a "not authorized" message, close all IE browser windows and then try again).

Using SurePDF With Macintosh

When printing with SurePDF, you can preview your document with Adobe Reader before uploading it to WebCRD. See instructions for enabling the preview if using applications such as InDesign, Photoshop, Quark, or PageMaker.

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

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.
4. Click **Print** on the Print dialog box. The PDF file is displayed in a new window after the Adobe PDF file is created (this may take a few moments).
5. View the online proof of the document and check for correctness.

   Note: If desired, you can click the **Print** button on the PDF toolbar to print a hardcopy of the PDF file.

6. Click **Connect** on the RSA SurePDF dialog box to display the WebCRD Login page.

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**.

   Note: If you have used SurePDF and logged in to WebCRD within the past 30 minutes, your User ID and password are displayed automatically on the Login page.

2. Select an Add option for the document:
   - My Cart: add this document to your current Cart.
   - Saved Order: add this document to a saved order (select the order from the drop-down list).
   - A New Cart: add this document to a new Cart (your current Cart contents, if any, are saved).
3. Click **Checkout**. The Transmitting File page may be displayed briefly as the PDF file is uploaded from your computer to the WebCRD server.

The Cart page is displayed automatically when the file transfer is complete. Select print options and submit the order as usual.

To add more files to this order:

Click **Continue Shopping** after selecting an Add option. The current file is uploaded to the WebCRD server. You can then close the Adobe JobReady window and upload another document.

Enabling the Preview Application for Macintosh

If you are using applications such as InDesign, Photoshop, Quark, or PageMaker on the Macintosh, follow these instructions to enable display of the PDF preview. Each print dialog box may be slightly different.

Depending on the application, the selections made may be saved and used the next time you print this file. Some applications may also provide saved preset printing choices so that you can easily apply these selections to other files. For example, InDesign allows you to save presets by clicking on the **Save Preset** button. The name you choose for your preset then appears in the Print Preset drop-down.

1. Choose **File | Print** in your application and select the SurePDF printer from the Printer drop-down.
2. Click **Printer...** to display an additional Print configuration dialog box. (InDesign displays a Warning dialog box; click **OK** to continue.)
3. Select the SurePDF printer from the Printer drop-down if necessary and also from the third drop-down (it displays Copies and Pages by default). Then select the preview application from the **Preview with** drop-down (that drop-down is not available until you make the correct selection from the third drop-down).
4. Click **Print** to save the settings and return to the application’s Print dialog box.
5. Click **Print** on the application’s Print dialog box to display the PDF preview.

Placing an Order using the Ordering Home Page

WebCRD's Ordering Home page is easy to use.

Adding items to your Cart

Add items to your Cart from the Ordering Home page using one 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 (such as those produced with optional SurePDF workflow software), or for supported native-format file types if optional CentralPDF workflow software is available.

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

If you are on the Cart page:

Click **Continue Shopping** to display the Ordering Home page and add more items to your Cart.

If you are on the Ordering Home page:

The **Cart** link in the Notifications area shows how many items are in your Cart (for example, Cart [1] indicates that there is one item in your Cart). Use any of the methods listed above to add more items to your Cart.

To start a new Cart:

On the Cart page, click **Start a New Cart**. You can choose whether to save the contents of your current Cart (the order is available from the Orders page), or discard them (the order is canceled).

Uploading new files

Uploading one or more new files is one way to add items to your Cart. You can upload a single file, or click the **Multiple Files?** link to upload more than one file.

To upload a new file and add it to your Cart:

1. Click **Browse** on the Ordering Home page to display the File Upload or Choose File dialog box.
2. Navigate to the folder containing the file you want, select it, and then click **Open**.
3. Click **Go** to upload this file, add it to your Cart, and display the Cart page.

To upload multiple files and add them to your Cart:

1. Click **Multiple Files?** on the Ordering Home page to display the Upload Multiple Files page.
2. Click **Browse** to display the File Upload or Choose File dialog box.
3. Navigate to the folder containing the file you want, select it, and then click **Open**.

   The file name is added to the Selected Files list on the right.
4. Repeat steps 2 and 3 until you have selected all files.
5. If you want to delete any files from the upload, click **Delete** in the Selected Files list.
6. Click **Upload** to upload all files in the Selected Files list, and display the Cart page.

Note: Files that you upload are saved in your default folder (click **Manage Files** on the Ordering Home page to select your default folder).

Adding Catalog items or items from My Files

You can add items to your Cart from the Catalog or from My Files.

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

1. Type search criteria for the item description (name) in the search box, and then click **Go** to display matching items.

   OR

   Click **Go** with no search criteria to display a list of all items.

   OR

   Click **Advanced Search** to select and/or search for items by Workgroup (Catalog only), Folder, and Item.
2. Type a quantity for the item to order, and then click **Add to Cart** (bottom of the page).

   The **Cart** link in the notifications area is updated to show the number of items currently in your Cart.
3. 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 Workgroup or folder.
4. When done adding items, click the **Cart** link in the notifications area to display the Cart page.

Adding a Special Order item

You can add a special order item to your Cart. Use this option when you do not have a file that can be uploaded.

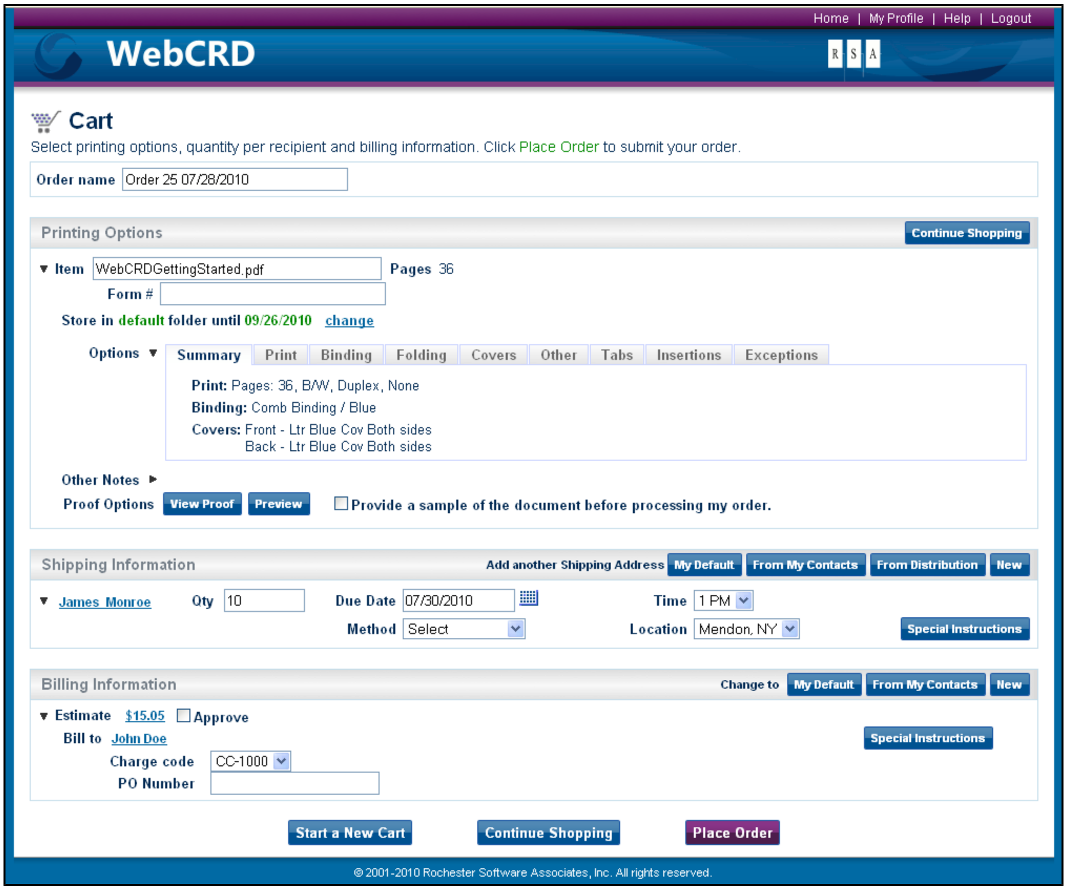
Examples of special order documents/items include:

- Hardcopy 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 Order section of the Ordering Home page. The Cart page is displayed, where you can configure this special order item.

Using the Cart page



Use the Cart page to specify Order Information, Printing Options, Shipping Information, and Billing Information for your order.

To place your order:

1. If desired, change default Order Information or select a different site for the order.
2. Configure the Printing Options for each item in the order (add more items to your Cart if desired).
3. Select quantities and due date for each Shipping Address (recipient) .
4. Review Billing Information (enter account codes if necessary).

   You can also click the **Estimate** link to see the Order Charges page if desired.
5. 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 on this page that may affect the price, such as quantity, due date, printing 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. IE 6 users only: click **Save** or **Update Estimate** to see the new order cost;(it is not updated automatically).

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. If you requested an estimate or are required to approve an estimate, select the **Approve** check box to approve it, if you have not already done so.
3. Click **Place Order** to submit the order to the print center or for approval.
   - The Approve pop-up window is shown if you did not select the Approve check box before clicking **Place Order**. Confirm the order cost and then click **OK** 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. 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 printing 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.

Printing an order receipt

The Order Submitted page is displayed to confirm that you submitted an order for approval or to the print center for processing.

Click the **Print Receipt** link (if available), and then click **OK** on the Print dialog box to print an order receipt.

You can also press Ctrl-P (Windows) or Command-P (Macintosh) to display the Print dialog box.

Placing an Order using the Form Order Welcome Page

Use the Form Order Welcome page to begin an order for standard forms, documents, and other items quickly and efficiently, using your default values for shipping and billing information.

Note: If you also have access to the Ordering Home page, Form Order shows the contents of your current order (the contents of your Cart) in the Order Summary. If this order has multiple recipients, you cannot add, remove, or change the recipients in Form Order. Return to your Cart page in Ordering to make changes to multiple recipients, if needed. You can also cancel this current order or place the current order if desired. If you do not have access to the Ordering Home page, the Order Summary has no content because you have not started an order yet. The Order Summary is section is filled in when you select items to order and click **Update This Order** before submitting the order.

To start an order:

1. Click the link for a Workgroup name to view its contents.
2. If the Folders page is displayed, select a folder.
3. Use the Items page to select items.

OR

Search for items using the Search bar.

Note: The **Cancel**, **Update This Order**, and **Place an Order** buttons have no function until you select items to order.

Selecting a folder

The Folders page lists the folders in the selected Workgroup. Use the Folders page to select a folder containing items to order. You can also use the Search bar to search for items in any of the Workgroup's folders.

Note: The folder list may not be displayed, depending on your server configuration (after selecting a Workgroup, the Items page may be displayed).

To select a folder:

Click the folder name in the list. The Items page for that folder is displayed, from which you can select items and complete the order.

Selecting items and placing your order

The Items page lists the items in the selected Workgroup/folder and lets you select specific quantities of items to order. If desired, use the Search bar to search for items on this page.

When a PDF proof is available, you can click an item's thumbnail image to view the form, document, or item in a pop-up window (the **View Proof** button is available if a thumbnail image is not available; the text "Proof Not Available" is displayed if there is no proof file). Alternatively; after you click **Update this Order**, the **Preview** button is available, which displays the SurePreview window.

Note: If multiple sites (print centers) are defined for your server (with the optional MultiSite module), your account may be authorized to select an order site. Some documents or items may be locked for output at a specific site only. When documents or items are site-locked, they cannot be ordered unless the order site is set appropriately. A site selection drop-down menu is displayed if your account is authorized to access multiple sites.

To select items and place your order:

1. Type the number of each item to order in the **Qty** text box (or select a quantity from the drop-down list, if available), and then click **Update this Order** at the bottom of the page.
   - To order a variable data form or item (PDF form, Dynamics form, or XMPie form), click the **Configure** button, which is displayed instead of the **Qty** text box.
   - To order a site-locked item (if a site name is displayed instead of the **Qty** text box), change the order site at the top of the page (if available). All items in the order must be available from the same site.
2. If necessary, scroll down to change the billing and shipping information for this order only.
   - Enter or modify account codes as desired.
   - Shipping information may be locked for your server (if locked, you cannot change it).
   - You may be required to select a shipping method.
3. If desired, click **Back** to return to the Folders page or the Form Order Welcome page to choose another folder or Workgroup from which to order items.
4. Review the Order Summary section of the page to ensure that your order is complete.
   - The Order Summary includes sections for Order Information, Billing Information, and Shipping Information.
   - If you change any information, click **Update This Order**, and wait for the Order Summary to be displayed again.
5. When you are ready, click **Place Order** to place the order.

   The Order Submitted page is displayed, confirming the submission of your order to the print center or for approval (if appropriate).

6. On the Order Submitted page, click the **Print Receipt** link to print a receipt of your order, if desired.

To adjust quantities of items already in the Order Summary:

- Type new quantities (or select a new value from the drop-down list) and then click **Update This Order**.
- Type 0 (zero) to remove an item from the Order Summary.
- For items that use a drop-down list for selecting the quantity, select the Zero quantity option to remove that item from the Order Summary.

Notes

Turn Printing Into Productivity

Getting Started with WebCRD V8.1.3

© Rochester Software Associates, Inc. June 2011