
RSA
Placing Orders in WebCRDTM

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.

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

The My Profile page is displayed.

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

Your contact information is now available for editing.

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.

Your contact information has been updated.

Updating Default Shipping Information

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

The My Profile page is displayed.

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

Your contact information is now available for editing.

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.

Your default shipping information has been updated.

Updating Default Billing Information

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

The My Profile page is displayed.

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

Your contact information is now available for editing.

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.

Your default billing information has been updated.

Updating Default Printing Options

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

The My Profile page is displayed.

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

The selected period will be displayed.

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.

The available print options will be displayed.

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

The selection option will be displayed.

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

The selection option will be displayed.

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

The selection option will be displayed.

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

The entered text will be displayed.


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

Your default printing options have been updated.

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**.
The application's Print dialog box will be displayed.
2. Use the *Printer* drop-down list to **select the appropriate Print Center** e.g., Print Center - West.
The selected Print Center name will be displayed in the Printer field.
3. Click the **Print** button.
The Adobe – PDF Job Ready window application will open and the document will be displayed in the main window.
4. Review the document and if acceptable, from the *Title Bar*, click the **Accept** button .
The WebCRD Login page will be displayed
5. Use the *Login* portlet to **enter your UserID and Password**.
6. In the *Login* portlet, click the **Log In** button.
You will be logged into WebCRD and the Add this document to: screen will be displayed.
***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.
The Cart page will be displayed.
8. In the *Order name* field, **enter a name** to use for this order.
The new name will be displayed in the Order name field.
9. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.
The selected site will be displayed in the Order site field.
10. Under *Print Options*, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.

The selected options will be displayed under the Options > Summary tab.

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.

The entered text will be displayed in the Other Notes field.

12. Use the **Shipping Information** section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.

The selected information will be displayed in the appropriate fields.

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.

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.



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.

The order has now been sent to the Print Center and the Order Submitted page will be displayed.

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 WebCRD 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.

The selected file will be highlighted.

3. Click the **Open** button.

The File Upload dialog box will close and the file path will be displayed in the Browse field.

4. Click the **Go** button.

The file will be uploaded into WebCRD and the Cart page will be displayed.

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

The new name will be displayed in the Order name field.

Note: *The order is given a default name, but 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.

The selected site will be displayed in the Order site field.

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

The selected options will be displayed under the Options > Summary tab.

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.

The entered text will be displayed in the Other Notes field.

9. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.

The selected information will be displayed in the appropriate fields.

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.

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.



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.

The order has now been sent to the Print Center and the Order Submitted page will be displayed.

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 an Order for Multiple Print Jobs

1. From the WebCRD home page, from the *Upload a File* portlet, click the **Multiple Files?** link.

The File Upload dialog page will be displayed.

2. Click the **Browse** button.

The File Upload dialog box will be displayed.

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

The selected file will be highlighted.

4. Click the **Open** button.

The File Upload dialog box will close and the selected file will be displayed under the Selected Files section on the Upload Multiple Files page.

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

6. Click the **Upload** button.

The Cart page will be displayed.

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.

The new name will be displayed in the Order name field.

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

The selected site will be displayed in the Order site field.

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

The selected options will be displayed under the Options > Summary tab.

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.

The entered text will be displayed in the Other Notes field.

11. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.

The selected information will be displayed in the appropriate fields.

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.

12. 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.

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

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

The order has now been sent to the Print Center and the Order Shipped page will be displayed.

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 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 WebCRD home page, from the *Search Catalog* portlet, click the **Advanced Search** link.
A list of the Catalogs you have access to will be displayed.
2. Click the appropriate **Folder** link.
The sub-folders and/or items stored in the folder will be displayed.
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.
The entered number will be displayed in the Qty field.
5. Click the **Add to Cart** button at the bottom of the page.
The number of Cart items will be increased to include the newly added item(s).
6. From the *Menu Bar*, click the **Cart** link.
The Cart page will be displayed.
7. Click the appropriate **Folder** link.
The sub-folders and/or items stored in the folder will be displayed.
8. In the *Order name* field, if desired, **enter a new name** to use for this order.
The new name will be displayed in the Order name field.
9. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.
The selected site will be displayed in the Order site field.
10. Under the *Print Options* section, use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.
The selected options will be displayed under the Options > Summary tab.
***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.
The entered text will be displayed in the Other Notes field.

12. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.

The selected information will be displayed in the appropriate fields.

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.

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.



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.

The order has now been sent to the Print Center and the Order Submitted page will be displayed.

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 WebCRD home page, from the *Special Orders* portlet, click the **Go** button.
The Cart page will be displayed.
2. In **the Order name** field, if desired, **enter a new name** to use for this order.
The new name will be displayed in the Order name field.
3. If you are using Multisite, use the *Order site* drop-down list to **highlight and select** the print center to receive this order.
The selected site will be displayed in the Order site field.
4. Use the *Other Source* drop-down list to **select** the source to be used for this order.
The selected source will be displayed in the Other Source field.

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.
The selected outcome will be displayed in the Other Disposition field.
6. Use the *Preset* buttons and **Options** tabs to **select** the appropriate print options.
The selected options will be displayed under the Options > Summary tab.

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.
The entered text will be displayed in the Other Notes field.

8. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.
The selected information will be displayed in the appropriate fields.

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.

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.

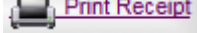


Note: Additional billing information and/or instructions can be added to the order by clicking on the **Special Instructions** button and entering the information into the Billing Instructions field.

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

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

The order has now been sent to the Print Center and the Order Submitted page will be displayed.

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 WebCRD home page, from the *My Files* portlet, click the **Advanced Search** link.

A list of your file folders will be displayed.

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

The sub-folders and/or items stored in the folder will be displayed.

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.

The entered number will be displayed in the Qty field.

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

The number of Cart items will be increased to include the newly added item(s).

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

The Cart page will be displayed.

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

The new name will be displayed in the Order name field.

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

The selected site will be displayed in the Order site field.

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

The selected options will be displayed under the Options > Summary tab.

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.

The entered text will be displayed in the Other Notes field.

11. Use the *Shipping Information* section to **select** the appropriate person to receive the order, the due date, and the preferred delivery method.

The selected information will be displayed in the appropriate fields.

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.

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.



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.

The order has now been sent to the Print Center and the Order Shipped page will be displayed.

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 a Re-Order

1. From the WebCRD home page, from the *Menu Bar*, click the **Orders** link.
The My Orders page will be displayed along with a list of all the orders that have been placed by the logged in user.
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.
The Cart page will be displayed.
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.
The new order has been sent to the Print Shop and a new order number has been assigned to the order.

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 WebCRD home page, from the *Menu Bar*, click the **Orders** link.
The My Orders page will be displayed along with a list of all the orders that have been placed by the logged in user.
2. Use the *Status* column to identify the status of the order.

Managing Your Files

Manage File 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.
The Manage My Files page will be displayed.
2. Click the **Create Folder** link on the upper right hand side of the page.
The Create Folder dialog box will be displayed.
3. **Enter the name of the new folder.**
The name of the new folder will be displayed in the Enter a new folder name field.
4. Click the **Create** button.
The Create Folder dialog box will close and the new folder will be displayed on the Manage My Folders page.

Changing Your Default Folder

1. From the *Menu Bar*, click on the **Manage Files** link.
The Manage My Files page will be displayed.
2. From the *Folders* section, use the *Default* column to **select the folder** you want to be your default folder.
The radio button next to the selected folder will now be filled in.
3. Click the **Save** button at the bottom of the page.
The selected folder has now been designated as your Default folder.

Deleting a Folder

1. From the *Menu Bar*, click on the **Manage Files** link.
The Manage My Files page will be displayed.
2. From the *Folders* section, use the *Delete* column to **place a checkmark next to the folder(s)** you want to delete.
A checkmark will be displayed next to all folders to be deleted.

Note: Only empty folders can be deleted.

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

The Manage My Files page will refresh and the deleted folder(s) will be removed.

Moving a Document into a Different Folder

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

The Manage My Files page will be displayed.

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**.

The selected folder will be displayed in the Folder drop-down list.

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

The file will be removed from the current folder and displayed in the selected folder.

Changing the Retention Time of a Document


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

The Manage My Files page will be displayed.

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

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

The Item Printing Options page will be displayed.

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

The calendar will be displayed.

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

The selected date will be displayed in the Item expires on field.

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

The new item retention date will be saved.