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# **RSA WebCRD™** **Getting Started**

**User Guide**



## ***Getting Started With WebCRD***

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Software Version: WebCRD V9.2.2

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# Chapter 1: Introduction to WebCRD

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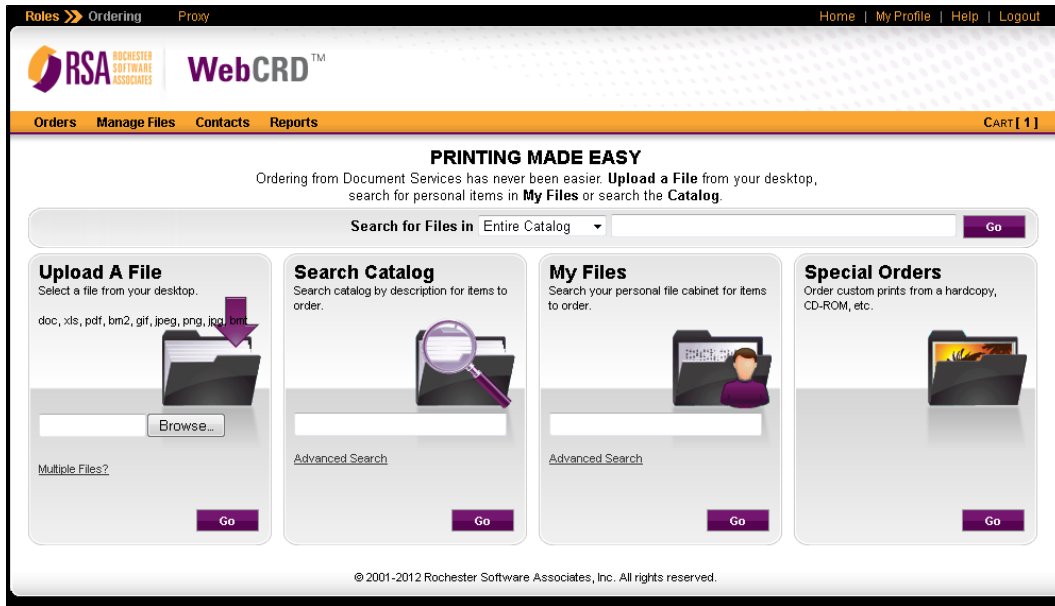
## Introduction to WebCRD

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.



## WebCRD Ordering Home Page



## WebCRD Cart Page

Roles >> Ordering Proxy Home | My Profile | Help | Logout

**RSA** ROCHESTER SOFTWARE ASSOCIATES **WebCRD™**

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**Cart** Cart ID 83

Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Order site Rocsoft Printing

Provide an optional name for your order. Estimate **\$21.60**  
*Naming your order can be helpful for reordering.*

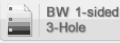

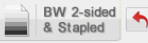

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**Item 1** Replace File Continue Shopping



 **WebCRDGettingStarted.pdf**   
 40 Pages Quantity **10**

Click the image to review the proof.  
 Select your print options, then click Preview to review this item prior to ordering.


**Select from these 1-Click Print Options:**

 BW 1-sided 3-Hole  Color 2-sided  BW 2-sided & Stapled 

**Refine Your Print Options:**

 **Basic** Click to choose color, paper stock, double-sided output.  **Additional** Click to choose a binding, staple, front and back covers, tabs, special services etc.

**Your Selected Print Options**

 [Preview Document](#)

**Print** B/W, Duplex, Ltr Wht 24  
**Instructions:** Product Specifications - USLetter White 24 lb, Blue covers, Dual Portrait Staple

**Binding** Comb Binding / Blue


**Covers** Front - Ltr Blue Cov, Both sides  
 Back - Ltr Blue Cov, Both sides

**Tabs** 4

[Enter special instructions for this item.](#)  Provide a sample of the document before processing my order.

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**Shipping Information** Add another Shipping Address My Default From My Contacts From Global From Distribution New

**Requested Ship Date** 02/14/2013  Note: Only dates when the print center is open may be selected.

**Rebecca Morris** Qty 10 **Requested Ship Date** 02/14/2013

**Method** Select **Location** Documentation [Special Instructions](#)

**Est. Delivery Date** 02/14/2013

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**Billing Information** Change to My Default From My Contacts From Global New

**Estimate** **\$21.60**  Approve

**Pay by Credit Card** Note: Your credit card may be charged up to 15% over the estimate total. [Special Instructions](#)

**Bill to** [Rebecca Morris](#)

**Charge code**

**PO Number** PO-000-001

[Start a New Cart](#) [Continue Shopping](#) [Place Order](#)

## WebCRD Certified Client Requirements

WebCRD™ is a server-based application that is accessible via a Web browser. Rochester Software Associates, Inc. strongly recommends that users maintain the most up-to-date client software versions of the major releases that we support.

WebCRD V9.2.1 is certified to work 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.

**WebCRD Certified Client Requirements**

<b>Platform</b>	<b>Browser</b>	<b>Additional Software (to view proofs/previews)</b>
Windows Vista*, Windows 7, 8*	Internet Explorer 8, 9, or 10* Firefox 15 and higher Chrome 22 and higher	Adobe Acrobat 8*, 9, 10, or 11; or Adobe Acrobat Reader 8.1*, 9, 10, or 11 <b>and</b> Adobe Flash Player 9*, 10, or 11
Windows XP	Internet Explorer 7* or 8 Firefox 15 and higher	
Mac OS X 10.6*, 10.7*, and 10.8	Safari 5 or 6 Firefox 15 and higher	

\* These versions are supported but not currently tested.

**Notes:**

- Internet Explorer 6 is incompatible, and may not be used.
- Internet Explorer (64 bit) that supports Adobe Flash is required for use with WebCRD's SurePreview™ feature.



## SurePDF 5 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 5 for WebCRD V9.2.1 is certified to work 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.

### SurePDF 5 Certified Client Requirements

Platform	Requirements	Additional Software (to view proofs/previews)
Windows 7 (32 & 64 bit)	Internet Explorer 8, 9, or 10*	Adobe Acrobat 8*, 9, 10, or 11; or Adobe Acrobat Reader 8.1*, 9, 10, or 11  <b>and</b> Adobe Flash Player 9*, 10, or 11
Windows 8* (64 bit)	Firefox 15 and higher Chrome 22 and higher 2 GB RAM 150 MB disk space	
Mac OS X 10.7 and 10.8	Safari 5 or 6 Firefox 15 and higher 2 GB RAM 150 MB disk space	

\* These versions are supported but not currently tested.

### Notes:

- Internet Explorer 6 is incompatible, and may not be used.
- Internet Explorer (64 bit) that supports Adobe Flash is required for use with WebCRD's SurePreview™ feature.

## Legacy SurePDF 4.2 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 4.2 is certified to work 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.

**Alert:** The legacy SurePDF 4.2 driver does not work with Windows 8; or with Adobe Reader 11 or Adobe Acrobat 11. Use the SurePDF 5 driver for those configurations.

**Alert:** No new development will be done for SurePDF 4.2, and new OS platforms will not be supported.

### Legacy SurePDF 4.2 Certified Client Requirements

Platform	Requirements	Additional Software (to view proofs/previews)
Windows Vista*, 7	Internet Explorer 8 or 9 2 GB RAM 150 MB disk space	Adobe Acrobat 8*, 9, or 10; or Adobe Acrobat Reader 8.1, 9, or 10 <b>and</b> Adobe Flash Player 9*, 10, or 11
Windows XP	Internet Explorer 7* or 8 2 GB RAM 150 MB disk space	
Mac OS X 10.6 and 10.7**	Safari 5 or 6 1 GB RAM 150 MB disk space	

\* These versions are supported but not currently tested.

\*\* Mac OS X 10.7 and 10.8 may use either the legacy SurePDF 4.2 driver or the SurePDF 5 driver.

**Notes:**

- Internet Explorer 6 is incompatible, and may not be used.
- Internet Explorer (64 bit) that supports Adobe Flash is required for use with WebCRD's SurePreview™ feature.



## Chapter 2: Getting Assistance/General Tips

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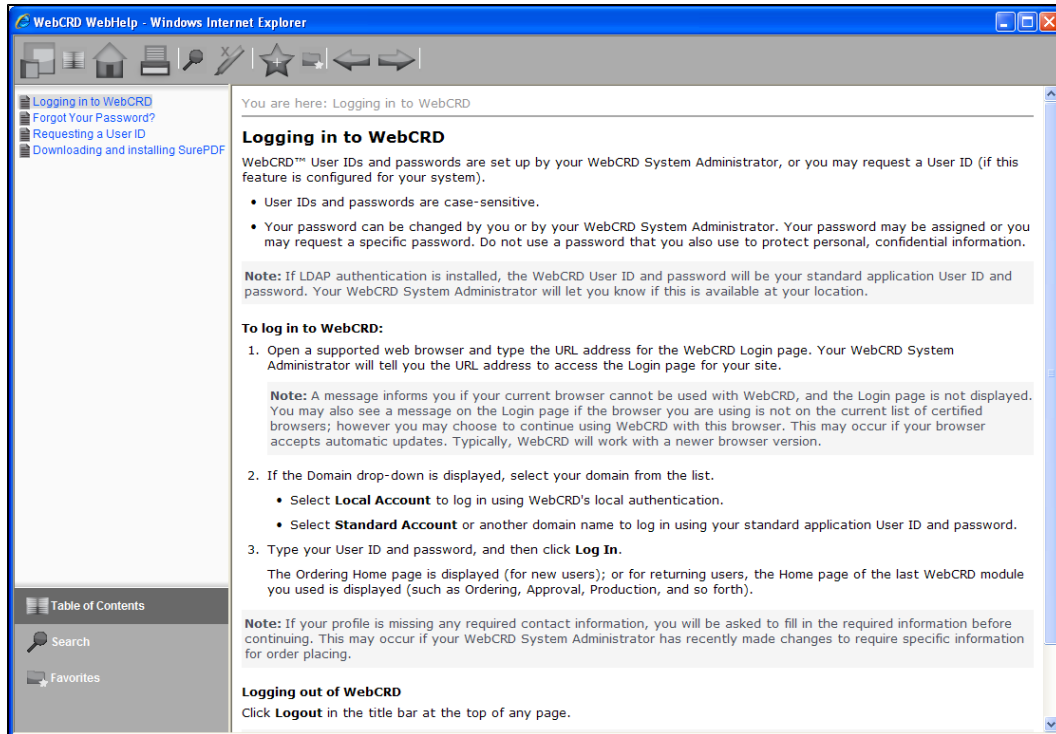
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### Using Online Help

The **Help** link at the top of each page opens online help in a new window.

- 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 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 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 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



### What's on the help window









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



- Click the **Table of Contents** 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 help window toolbar to see a tool tip explaining its function.



Button	Explanation
	Show or hide the Navigation Pane.
	Display the Table of Contents (same as clicking the Table of Contents tab).
	Display the home page of the help file (usually an introduction topic).
	Print the current topic.
	Display the <a href="#">Search pane</a> (same as clicking the Search tab).
	Remove search highlighting from topics after a search.
	Add to Favorites (saved for each user ID on a specific computer).
	Display the Favorites pane (same as clicking the Favorites tab).

Button	Explanation
	Go back to the previous topic.
	Go forward to the next topic (use after you have clicked Back).

### 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 typically displayed in your browser's title bar or in the tab title of some tabbed browsers (depending on the browser and version you are using).





- **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 to order for other users or to administer a Catalog](#), 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. Click one of the links to go to Approvals, Rejected Orders, the Book Details page, or to your Cart.

**APPROVALS [ 1 ] REJECTIONS [ 1 ] BOOK [ 4 ] CART [ 2 ]**

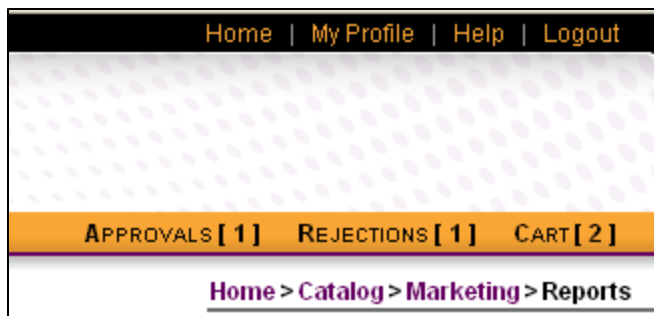
**Approvals:** number of orders waiting for approval (if you are an approver)

**Rejections:** number of orders that have been rejected (if any)

**Book:** number of items in the active book (optional feature; shown only when in Book mode and if licensed)

**Cart:** number of items in 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](#) using the Search field, or using Advanced Search criteria.

- Typical Advanced Search criteria includes Item, Form #, Description, dates, and optional metadata fields (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 (when available)

If Proxy is enabled for your account, the **Proxy** link is shown at the top of all WebCRD pages. Your WebCRD System Administrator sets this permission for your account.



- If you have *unrestricted* Proxy access, you can place orders for all users or administer any Catalog (Workgroup).
- If you have *limited* proxy access, you can place orders only for Catalog members who have specifically authorized proxy ordering; or administer only Catalogs (Workgroups) that have specifically authorized you to do so.
- Proxy 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.
- A proxy order starts a new Cart. The user's current Cart (if any) is saved first.
- When you proxy for another user or a Catalog, you can select the target user's skin, or you can keep your own skin (if this option is enabled for your server). Your choice is remembered for the next time. You may wish to use the target user's skin when you proxy so that you have easy access to all of their content from links on the Ordering Home page.

### To use Proxy to order for another user:

1. Log in to your WebCRD account.
2. Click the **Proxy** link at the top of any WebCRD page.
3. On the Proxy Mode page, type a full or partial name or User ID, and then click the **Search** button for Place an Order for a User.
4. On the **Proxy for User** page, select the user for whom you want to order. (Local) or (Domain Name) designation may be shown after the User ID.
5. Add items to the user's Cart and place orders as needed. 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 a proxy order are sent to the user, not to you.

**To use Proxy to administer a Catalog (Workgroup):**

1. Log in to your WebCRD account.
2. Click the **Proxy** link at the top of any WebCRD page.
3. On the Proxy Mode page, type a full or partial Catalog name (Workgroup ID), and then click the **Search** button for Administer a Workgroup.
4. On the **Proxy for Workgroup** page, select the Catalog (Workgroup) to administer.
5. Perform Catalog administration functions as needed.  
The text at the top of each page reminds you that you are acting on behalf of a Catalog, using all of that Catalog's account defaults.

**To switch to another user or Catalog (Workgroup):**

1. Click **Switch User** at the top of any page.
2. On the Proxy Mode page, type a full or partial name, User ID, or Catalog (Workgroup) name, and then click the **Search** button corresponding to the proxy mode you want to use: Place an Order for a User; or Administer a Workgroup.
3. On the **Proxy for User** or **Proxy for Workgroup** page, select the user for whom you want to order; or the Catalog (Workgroup) to administer.

**To select the target skin for proxy ordering:**

1. Log in to your WebCRD account.
2. Click the **Proxy** link at the top of any WebCRD page.
3. On the Proxy Mode page, click the **Search** button next to Place an Order for a User.
4. On the Proxy for User page, click the **Proxy Mode Skin and Locale** link.
5. Make a selection on the Proxy Mode dialog box, and click **Save**.
  - Your skin and locale: use your own skin and locale settings for proxy mode.
  - Target skin and locale: use the skin and locale settings of the user or group you are proxying for.

**To end Proxy and return to your own account:**

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

**Using the Item Search Bar**

The Item Search bar contains a Search field that can be used to 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, and then click **Search**, or press **Enter** on your keyboard to display matching items in the list.

You can also click **Show Advanced Search Criteria** to display specific field inputs for all available search criteria. 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).

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-insensitive.
- All search fields accept partial search terms (you can specify either an exact match or a partial match).
- 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.
- You can specify multiple words for searching (separated by a space; do not use commas or quotes).

For example, you can type **Fall 2011** to search for items containing those words, in that order.

This will match items such as **Fall 2011 Newsletter**, **fall 2011 newsletter**, and **Newsletters - Fall 2011** but it will not match an item named **2011 Newsletter - Fall**.

- Category keyword searching (also known as metadata searching) may be available for searching the Catalog, if configured at your location. Your WebCRD System Administrator will inform you of the category keywords that are available.
- Categories can be configured as searchable, even if not displayed. Use the Search field to search non-displayed category fields. Your WebCRD System Administrator configures the search and display attributes of each category (metadata) field.
- Use Advanced Search to search specific category fields for 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 one or more full or partial search terms in the Search field.

OR

Click **Show Advanced Search Criteria** to type search terms in specific input fields for all available search criteria.

3. Click **Search**, or press **Enter** on your keyboard to display the items matching all criteria in either the selected folder or all folders.

**About searching for items using category keywords (metadata):**

- For category searching, it is helpful to know the category keywords that have been applied to the items. Your WebCRD System Administrator can provide a list of these.
- You can also enter partial category keywords (all matching items will be returned).
- Category keyword fields may be searchable using the Search field, even if they are not displayed in the Advanced Search. This option is configured by your WebCRD System Administrator.



## Chapter 3: Getting Started with WebCRD

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### 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 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 profile 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.

### 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 or with UAC enabled (as appropriate for your system).
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. Verify the default selection on the Download page, and then click **Download SurePDF**.

**Note:** WebCRD automatically selects the appropriate SurePDF driver for your operating system.

5. Save the file to a location such as your desktop.
6. Click **Return to Login Page** to display the WebCRD Login page again.

### *Installing SurePDF - Windows*

**Note:** This information applies to the SurePDF 5 workflow.

**Note:** 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 - Macintosh***

**Note:** This information applies to the SurePDF 5 workflow.

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

**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

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### 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 and 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**).
3. 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**.

**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.

**Note:** If your profile 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.

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**.
3. Select print options on the Cart page, and submit the order.

**To add more files to this order:**

Click **Continue Shopping** to display the Ordering Home page. You can then select additional files (that you previously uploaded) from your folders or from the Catalog, or you can close the WebCRD browser window and print another document to the SurePDF printer to add to your Cart.

**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. Optional: select the SurePDF printer from the **Printer** drop-down list (the actual printer name is specific to your location).

**Note:** This step applies only if a custom PPD is used at your location (for setting custom page sizes and other attributes).

4. Select the SurePDF printer from the PDF menu (by default, the SurePDF printer is named **Send to WebCRD**; this name may be customized for your location).  
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**.

**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.

**Note:** If your profile 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.

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**.
3. Select print options on the Cart page, and submit the order.

#### **To add more files to this order:**

Click **Continue Shopping** to display the Ordering Home page. You can then select additional files (that you previously uploaded) from your folders or from the Catalog, or you can close the WebCRD browser window and print another document to the SurePDF printer to add to your Cart.

#### ***Enabling the Preview Application for Macintosh***

**Note:** This information applies to the legacy SurePDF 4.2 workflow.

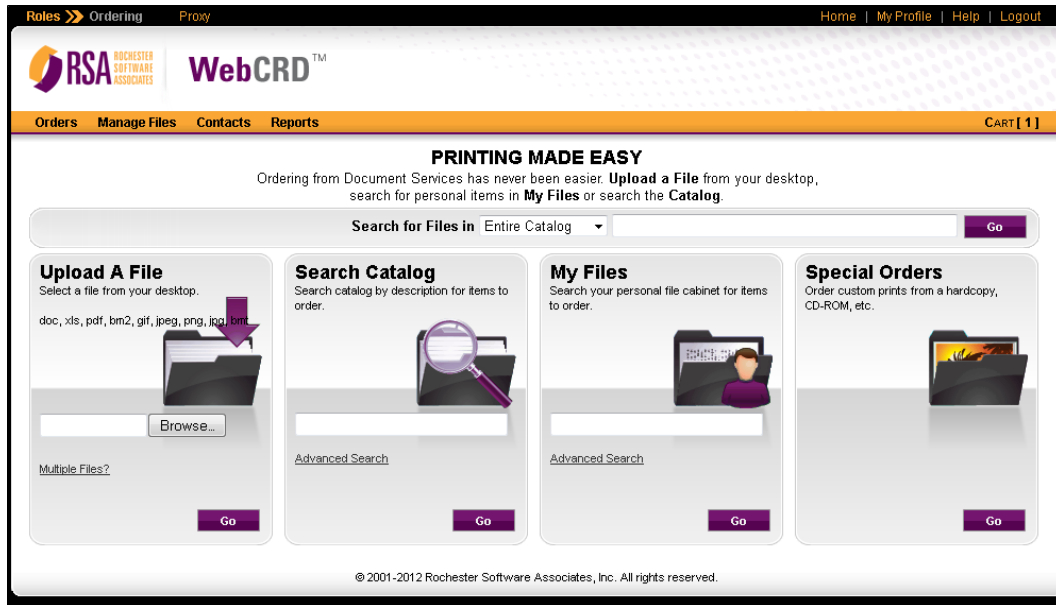
If you are using applications such as InDesign, Photoshop, Quark, or PageMaker on the Macintosh, follow these instructions to enable display of the PDF preview. Each print dialog box may be slightly different.

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** (or **Add to Cart**, in Book mode) 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 **Add to Cart** 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. 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.  
OR  
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.
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 quantities for one or more items, and then click **Add All to Cart** (bottom of page).  
OR  
Type a quantity for a single item to order, and then click **Add to Cart**.  
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.

***Additional information about searching for items from the Ordering Home page***

Several options are 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 by Item Description	Searching by Category Keyword
<p>Type all or part of an item description in the <b>Search Catalog</b> or <b>My Files</b> search box, and then click <b>Go</b>.</p>	<p>Select a category from the drop-down list, type all or part of a category keyword in the <b>Search Catalog</b> search box, and then click <b>Go</b>. The keyword or partial keyword you type must be a keyword for the selected category.</p>
<div data-bbox="310 604 781 1163"> <p><b>Search Catalog</b> Search catalog by description for items to order.</p>  <input data-bbox="337 909 732 947" type="text" value="Fall 2011"/> <p><a href="#">Advanced Search</a></p> <input data-bbox="634 1087 748 1129" type="button" value="Go"/> </div>	<div data-bbox="878 604 1349 1163"> <p><b>Search Catalog</b> Search catalog by category for items to order.</p>  <div data-bbox="911 909 1117 947"> <input type="text" value="Supplier"/> </div> <input data-bbox="906 961 1300 1003" type="text" value="Acme"/> <p><a href="#">Advanced Search</a></p> <input data-bbox="1203 1087 1317 1129" type="button" value="Go"/> </div>
Searching with the Search Bar	
<div data-bbox="310 1329 1365 1398"> <p>Search for Files in <input type="text" value="Entire Catalog"/> 2012 Newsletter <input data-bbox="1263 1346 1360 1388" type="button" value="Go"/></p> </div>	
<p>Type one or more full or partial search terms in the Search field, select a Catalog if desired (or leave drop-down set to Entire Catalog to search all Catalogs for which you have access), and then click <b>Go</b>.</p>	

**Search reminders:**

- The search function is case-insensitive.
- All search fields accept partial search terms (you can specify either an exact match or a partial match).

- 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.
- You can specify multiple words for searching (separated by a space; do not use commas or quotes).

For example, you can type **Fall 2011** to search for items containing those words, in that order.

This will match items such as **Fall 2011 Newsletter**, **fall 2011 newsletter**, and **Newsletters - Fall 2011** but it will not match an item named **2011 Newsletter - Fall**.

### More search options:

Advanced Search is available by clicking the Advanced Search link, and then clicking Show Advanced Search Criteria.

You can specify multiple search terms, which are ANDed together. Search by Item Description, Form #, Dates, and/or category keywords (if this feature is configured by your WebCRD System Administrator).

The screenshot shows a search interface titled "Item Search". It features a search input field with a "Search" button and a "Clear" button. Below the search field is a link for "Show Advanced Search Criteria". On the right side, there are two dropdown menus: "Rows Per Page" set to 5 and "Sort By" set to Item, with a secondary dropdown for "A-Z".

The screenshot shows the advanced search interface. It includes the same search field and buttons as the basic interface. Below the search field, there are several input fields for search criteria: "Item", "Form #", "Product Type", "Location", "Created from", "to", "Supplier", and "Price Code". Each of these fields has a small grid icon next to it, likely for selecting from a list or grid of options.

### 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 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

The screenshot displays the WebCRD Cart page with the following sections:

- Header:** Roles >> Ordering Proxy, Home | My Profile | Help | Logout, RSA ROCHESTER SOFTWARE ASSOCIATES WebCRD™
- Cart Summary:** Cart ID 83, Order site: Rocsoft Printing, Estimate \$21.60. Includes a link to "Provide an optional name for your order."
- Item 1:** WebCRDGettingStarted.pdf (40 Pages), Quantity 10. Includes a "Replace File" button and a "Continue Shopping" button. Below the item name is a "Select from these 1-Click Print Options" section with icons for BW 1-sided 3-Hole, Color 2-sided, and BW 2-sided & Stapled. A "Refine Your Print Options" section includes "Basic" and "Additional" options. A "Your Selected Print Options" box shows: Print B/W, Duplex, Ltr Wht 24; Instructions: Product Specifications - USLetter White 24 lb, Blue covers, Dual Portrait Staple; Binding Comb Binding / Blue; Covers Front - Ltr Blue Cov, Both sides; Back - Ltr Blue Cov, Both sides; Tabs 4. There is a "Preview Document" link and a checkbox for "Provide a sample of the document before processing my order."
- Shipping Information:** Add another Shipping Address, My Default, From My Contacts, From Global, From Distribution, New. Requested Ship Date: 02/14/2013. Note: Only dates when the print center is open may be selected. Recipient: Rebecca Morris, Qty: 10. Requested Ship Date: 02/14/2013. Method: Select, Location: Documentation, Est. Delivery Date: 02/14/2013. Includes a "Special Instructions" button.
- Billing Information:** Change to My Default, From My Contacts, From Global, New. Estimate: \$21.60, Approve checkbox. Pay by Credit Card checkbox with note: "Your credit card may be charged up to 15% over the estimate total." Bill to: Rebecca Morris. Charge code dropdown, PO Number: PO-000-001. Includes a "Special Instructions" button.
- Footer Buttons:** Start a New Cart, Continue Shopping, Place Order.

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

**To place your order:**

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

***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.

Your order receipt will also be emailed to you (if you selected this option on your Profile page).

## 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 Catalog. 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 Catalog's folders.

**Note:** The folder list may not be displayed, depending on your server configuration (after selecting a Catalog, 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 Catalog/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



Getting Started With WebCRD V9.2.2

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