



# RSA WebCRD™

Getting Started  
*User Guide*

## **Getting Started With WebCRD**

Document Version: V11.2.5-3

Software Version: WebCRD V11.2.5

November 2022

© 2001 - 2022 Rochester Software Associates, Inc. All Rights Reserved.

AutoFlow™, AutoStock™, CentralPDF™, ImpactVDP™, 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

---

<b>Chapter 1: Introduction</b> .....	<b>1</b>
Welcome to WebCRD .....	1
Using Online Help .....	4
<b>Chapter 2: Logging In and Out of WebCRD</b> .....	<b>7</b>
Log in / Log out .....	7
<b>Chapter 3: Ordering Items and Placing Orders</b> .....	<b>9</b>
Ordering Items Using the Ordering Home Page .....	9
Placing an Order with SurePDF .....	15



# Chapter 1: Introduction

---

Welcome to WebCRD .....	1
Using Online Help .....	4

## Welcome to WebCRD

WebCRD™ is an online tool for ordering printed documents and other items from your organization's print center or distribution warehouse. You can place orders for files that you upload from your computer, or for items that you pick from a Catalog.

This short guide will tell you the basics of using WebCRD: how to log in, how to upload your own files or pick other items to order, and then how to place your order with the print center.

### *What do I want to order?*

After logging in to WebCRD, there are a few different ways to get items into your shopping Cart to order. Keep in mind that some of the ways to add items to your Cart might not be available for your account or at your location. If you don't see a particular option that's described here, ask your WebCRD System Administrator to tell you which features are available for you to use.

## ***How do I select print options for my items... and... how much will this cost, anyway?***

Once you add items to your Cart, you can select what you want the print center to do with each item. For example, for print items, you can typically select options such as 2-sided or single-sided printing, paper colors, black and white or color printing for the whole document or for specific pages, binding, tabs, and so forth. There's also a real-time preview which is updated as you pick various options, so you'll see exactly how your file will look once it's printed.

The options are endless, and you'll be able to select from any of the services that your print center offers (although the system won't let you pick options that don't make sense, such as stapling for a 1-page document).

As you select your options, the price for the item is updated immediately, so you can see just how much your order will cost. You're in complete control, and you can adjust the print options as needed to fall within a desired price point per copy.

## ***Who's going to get the stuff that I'm ordering?***

You'll also select people to receive your order. Usually, it's *you* receiving the stuff you're ordering. And, you can definitely add in your best friend and your office buddy and your next door neighbor and your grandmother too... in fact, you can add in as many people as desired, to receive as many copies as needed, of all or some of the items in your order.

## ***And... who's paying for it all?***

You may need to type in account codes, because someone has to pay for your order, or because the accountants at your location just want to keep track of the budget category for this expense. Credit card payment may also be available (you'll see it in the Billing section if that's an option for your account).

## ***Finally... when will I get my stuff?***

Once you click **Place Order** on the Cart page, everything gets sent to the print center (note: if required for your account, your order might need to be approved first before the print center gets it).

You can choose to have an order receipt emailed to you (most people like that, but if you don't, you can turn it off on your My Account page).

You can also track the status of your order on the My Orders page. This page is always up-to-date, and it tells you if your order is still being worked on at the print center, or whether it has shipped yet.

OK, let's get started! First, take a moment to read about how to get help with WebCRD if you need it, then you can dive in and order your first items.

## Using Online Help

If you need assistance at any time when you're using WebCRD, just click the **Help** link, which is found at the top of each page.

This opens up the help for the page you're on, either in a new window or a new tab of your browser, depending on how you have your browser configured. If you don't see the help pop up right away, look carefully at your browser tabs and find the one that has the WebCRD help.

- Navigate to other topics using the side menu.
- Search for information by typing one or more search keywords into the search bar, and then clicking the **Search** button.

### *Search Tips*

#### **Tip 1: use double quotes to search for an exact string**

`"account codes"`



#### **Tip 2: use AND / OR with multiple search keywords**

- Use *AND* (or simply a space) between search keywords to find topics containing all search keywords, anywhere in the topic (the words don't have to be next to each other).
- Use *OR* between search keywords to find topics containing either search keyword, anywhere in the topic.

`account AND codes`

`account codes` (same as using `AND`)

`account OR codes`

- Click the  **Expand All / Collapse All** button at the top of a topic to expand (show) or collapse (hide) all text hidden beneath clickable toggler links in the topic.
- Click the  **Print** button at the top of a topic to print that topic, or use your standard operating system and browser commands (such as **File | Print, Ctrl+P**, or **Command+P**, depending on your browser and whether you are on Windows or Mac).

You may wish to click the **Expand All** button to expand all hidden text before printing.



- PDFs of WebCRD online help and training information for each module can be viewed or downloaded from the Help link in each module (such as Ordering, Approval, etc.), as well as from the Help link in Administrator.

Click **Help**, then look for the topic “Documentation PDFs and Videos” (you can find the topic under the **About** menu, or use the search bar to search for the term “Documentation”).

- If you are a WebCRD System Administrator, you’ll have access to the all help for the system (all modules) in a single help window, and you’ll be able to see a list of all PDFs and videos from the help topic “All WebCRD Documentation (PDFs and Videos)”.



# Chapter 2: Logging In and Out of WebCRD

---

Log in / Log out ..... 7

## Log in / Log out

WebCRD accounts are typically created by your WebCRD System Administrator. WebCRD also has a "New User Registration" option. If this option is available at your location, you'll see a link on the Login page to request an account.

Once your account is created (and approved if necessary), you'll receive an email with your User ID and a link that you can use to set your password.

### ***User ID and password tips***

- If LDAP or another type of Single-Sign-On (SSO) authentication is installed, your WebCRD User ID and password will be your standard application User ID and password. Your WebCRD System Administrator will let you know if LDAP or SSO is used at your location.
- User IDs and passwords are case-sensitive.
- Do not use a password that you also use to protect personal, confidential information.
- If your password has expired, you'll be asked for a new password as soon as you log in.
- You can change your password on your My Account page (this function won't be available if your location uses LDAP or SSO authentication; in this case, you'll change your password following your standard procedures, and WebCRD will know about your updated password).

- If you forget your WebCRD password, you can request that the system send you an email with a link to reset your password (if this feature is configured for your system). Your existing password won't be reset until you actually complete the password reset process, so if you remember your password and decide you don't want to reset it, you can simply ignore the password reset email.
- Your WebCRD System Administrator can also reset your password; if this happens, you'll receive an email with a link that you can use to reset your password.

### Log in

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 for the Login page.

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 versions.

2. If the **Domain** drop-down is displayed, select your domain from the list.
  - Select **Local Account** to log in using a WebCRD user ID and password (local authentication).
  - Select **Standard Account** or another domain name to log in using your standard application User ID and password (if LDAP or SSO is used at your location).
3. Type your User ID and password, and then click **Log In**.

If your account is missing any required contact information (phone, ZIP, etc.), you will be asked to fill in the required information before continuing.

If your organization requires you review and agree to a privacy policy, you will be asked to do that before continuing. After agreeing to the privacy policy, you won't have to do this again unless your organization updates its policy.

### Log out

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

You are automatically logged out if there is no activity on your screen for a time (default: 30 minutes).

# Chapter 3: Ordering Items and Placing Orders

---

Ordering Items Using the Ordering Home Page .....	9
Placing an Order with SurePDF .....	15

## Ordering Items Using the Ordering Home Page

The Ordering Home page is displayed when you first log in to WebCRD. This page is where you'll start when you want to add items to your Cart. Remember, some of the options that are discussed here may not be available for your account. Your WebCRD System Administrator can answer any questions you may have about which options are available to you.

Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. When you add items to your Cart, a message informs you if your Cart is already full, or if the new items would exceed the maximum allowed (no files will be uploaded).

## *Uploading new files to your Cart*

Uploading one or more new files is one way to add items to your Cart. There are several ways that you can select files to upload.

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). When you browse for files to upload, WebCRD automatically shows you only the file types accepted by your print center.

Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. When you add items to your Cart, a message informs you if your Cart is already full, or if the new items would exceed the maximum allowed (no files will be uploaded).

To upload a file such as a Google Docs document to WebCRD, first save it as a PDF on your desktop or other network-accessible location, then upload the PDF to WebCRD.

### **Upload one or more files from your desktop by selecting them from a folder**

1. On the Ordering Home page, click anywhere on the **Upload a File** tile (or click the **Click to Browse** link).  
The Open or Choose File dialog box is displayed, filtered to show only file types that are accepted for upload by your print center.
2. Navigate to the folder containing the file(s) you want.
3. Select one or more files in the folder.  
Use standard selection methods for your computer to select multiple files (for example, shift-click and ctrl-click).
4. Click **Open** to upload the selected files.  
The Cart page is displayed after the files have been uploaded.
5. If you want to upload more files (for example, from a different folder), click **Continue Shopping** on the Cart page, then repeat steps 1-4.

### **Upload one or more files from your desktop using drag and drop**

1. Navigate to the folder containing the file(s) you want.
2. Select one or more files in the folder.  
Use standard selection methods for your computer to select multiple files (for example, shift-click and ctrl-click).
3. Drag the files to the Ordering Home page, and drop them anywhere on the **Upload a File** tile.  
The Cart page is displayed after the files have been uploaded.
4. If you want to upload more files (for example, from a different folder), click **Continue Shopping** on the Cart page, then repeat steps 1-3.

## ***Adding Catalog items or items from My Files to your Cart***

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

- The Catalog contains items that are already uploaded and configured. Catalog items may have a fixed price or use a price tier (which means that the pricing varies according to the quantity ordered—usually, if you order more, it will be cheaper per copy). If the Price link is shown, you can click it to display the complete price tier information.
- My Files are your own files that you've previously uploaded.

### **Add items to your Cart from the Catalog or from My Files**

1. Use the Search for Items area on the Ordering Home page to select 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 **Search** 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 or select quantities for one or more items, and then click **Add All to Cart** (bottom of page).

OR

Type or select a quantity for a single item to order, and then click **Add to Cart**.

For digital download items, there is no quantity selection (the quantity is always 1). Simply click **Add to Cart** next to a download item to order it.

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. The text (**Multiple Recipients**) is shown in this case, and the total quantity added to the Cart is the specified quantity \* number of recipients.

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

## ***How to search for items to add to your Cart***

### **Searching from the Ordering Home page**

You can search for items in all Catalogs, in a selected Catalog, or in your files. Type one or more search terms (full or partial) in the Search field.

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

To search, type one or more full or partial search terms in the search fields, and then click **Search**, or press **Enter** on your keyboard to display matching items in the list.

### ***Search details***

- Specific search fields that are available will vary depending on the page you are currently on.
- The Item Search bar contains a single Search field that can be used to search for an item by Item Description, Form #, or any active metadata category field.
- Select a **Rows Per Page** option to display fewer or more items in the list.
- Select a **Sort By** option to change the default sort order (display order) of the items in the list.

Options are: Date Created, Item, Form #, and Location (Catalog / Folder).

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

## ***Adding a Special Order item to your Cart***

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

Examples of special order documents or items include:

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



### **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 select options for this item (this may include print options, as well specifying as who will receive this item and billing information).

### ***Using the Cart page***

Depending on how your account is set up, some functions of the Cart page may be locked (not changeable) or hidden, such as account codes, or Shipping (recipient) or Billing information. The standard options are described here.

#### **Overview: Use the Cart page to place an order**

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

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

2. Click the **Preview/Change Options** link to configure the Print Options for each item in the order.
3. Click **Continue Shopping** to add more items to your Cart if desired.
4. Select the desired ship date or service level for your order (use either the pop-up calendar or the Service Level drop-down list, depending which method is available for you).
5. Select quantities and the shipping method for each Shipping Address (recipient) .
6. Review Billing Information (enter account codes if necessary).

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

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

#### **What happens when you click the Place Order button**

When you place your order, it is either submitted to the print center immediately for processing, or submitted for approval before being sent to the print center.

If additional approval of your order is needed, a message informs you of this, so you'll know that your order will not be sent to the print center until it's been approved. Typically, you'll know if your orders need to be approved (based on the cost of the order, or account codes that you specified, or other factors).

1. Review your order carefully on the Cart page before clicking the **Place Order** button.

You can always cancel an unsubmitted order and orders for which credit card payment has not yet been completed. Once you place the order (submit it for approval or to the print center), you may be able to cancel the order up to a certain point in the Production process. If this feature is enabled and the order is eligible to be canceled, you'll see a **Cancel Order** button on your Order History page. If this feature is not enabled, contact either your approver or your print center to cancel an order that has been submitted.

2. Click **Place Order** at the bottom of the Cart page.
  - Confirm the order cost, and then click **Place Order** again on the confirmation dialog box to submit the order to the print center or for approval.
  - You can click **Cancel** on the dialog box to return to the Cart page if you need to make more changes.
  - After you place the order, the Order Submitted page is displayed. You can print this page as an order receipt if desired (most users have the order receipt send to their email; you can set this up in My Account).
  - If you've ordered any download items (and the order does not need approval), you can download your items by clicking the links on the Order Submitted page.

You can also click the links in the Download Items Available email that you'll receive, or view your order history and download the items from the Order Details page.

If your order requires approval, you'll be able to download your items as soon as the order is approved.

### **Save your Cart without placing an order**

WebCRD automatically saves changes you make on the Cart page (such as print options, quantities, ship date, 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.

Depending on how your account is set up, you may have the option to save your current Cart. If you save your current Cart, your order will be available from the Orders list.

If you do not have the option to save your current Cart or if you choose not to save your current Cart, the order in progress is canceled.

## Placing an Order with SurePDF

SurePDF™ is an optional module that is available for both Windows and Macintosh computers. Create your content in the application of your choice (such as Word, Excel, and so forth). Then, simply select the **Print** command in your application, and pick the SurePDF printer to start the process of uploading a file to WebCRD and placing an order. You'll select all of the print options for this file on the Cart page before placing the order.

Ensure that you have downloaded and installed the SurePDF print driver for your operating system.

### *Placing a SurePDF order (Windows and Macintosh)*

These steps are the same for both Windows and Mac users.

#### Upload a file to WebCRD using the SurePDF printer

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

The progress bar is displayed as the file is being converted to PDF and uploaded to WebCRD.

After you log in to WebCRD and configure the file, you can use SurePDF to add more files to the order before submitting it.

#### Log in to WebCRD to configure the file and optionally submit the order

1. On the WebCRD Login page, type your User ID and password, and then click **Log In**.

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.

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

2. If you already have items in your Cart, you can either add this file 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 file to your current Cart (default selection); or Select **A New Cart** to add this file to a new Cart (your current Cart contents, if any, are saved).
  - Click **Checkout**.

Depending on the configuration of your account, there may be a maximum number of unique items allowed in your Cart. When you add items to your Cart, a message informs you if your Cart is already full, or if the new items would exceed the maximum allowed (no files will be uploaded).

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

- Go to the existing Cart without ordering this file
  - Create a new Cart and order this file.  
Your existing Cart will be saved and can be found on the Orders page.
  - Add to Book (only shown if optional Book feature is installed)
3. Select print options for the file.
  4. If you want to add more files to the order, click **Continue Shopping** to display the Ordering Home page, and then do one of the following:
    - Select additional files (that you previously uploaded) from your My Files area or from the Catalog.
    - Close the WebCRD browser window and print another document to the SurePDF printer to add to your Cart.
  5. When you are ready to submit the order, click **Place Order** on the Cart page.

### **Add more files to this order from your uploaded files or from SurePDF**

Before placing the order, click **Continue Shopping** on the Cart page to display the Ordering Home page, and then do one of the following:

- Select additional files (that you previously uploaded) from your My Files area or from the Catalog.
- Close the WebCRD browser window and print another document to the SurePDF printer to add to your Cart.

## Notes



Getting Started With WebCRD V11.2.5

© Rochester Software Associates, Inc. November 2022