

THE NEW DOCUMENT SOLUTIONS ORDER MANAGEMENT SOLUTION



SFU DOCUMENT SOLUTIONS
WebCRD PRINT ORDERING AND MANAGEMENT

Hello.

Welcome to the Document Solutions' new version of the **WebCRD Online Order Management Solution**. We anticipate that you will experience better performance and an interface that is more responsive to the way that you would like to work.

There are some changes in the interface that will give you greater flexibility in placing and monitoring your orders placed at Document Solutions.

This handout outlines the major changes that may impact you. The system uses a shopping cart metaphor in handling your requests. However, the fundamentals remain relatively unchanged and if you have any questions, please feel free to contact us for assistance or a demonstration of the new system.

WELCOME TO THE NEW SYSTEM

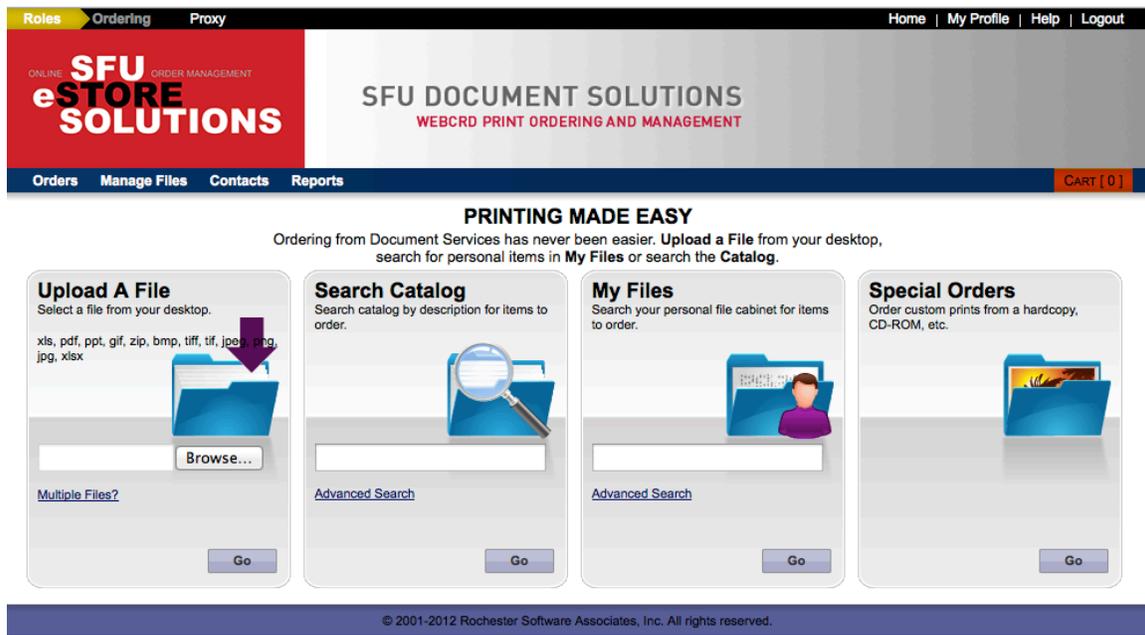
To begin, you can log in using your existing account name and password.

A screenshot of a login form. The form has a light blue background and a white border. At the top left, it says "Login" in bold. Below that, it says "If you already have a WebCRD account, please log in below." To the right of this text is a purple padlock icon. Below that, it says "If you do not yet have a WebCRD account, click below to register." Below the text are two input fields: "User ID" and "Password". At the bottom right of the form is a "Log In" button.

Please use this opportunity to update your contact and shipping information.

THE NEW INTERFACE

Afterwards, you will see a brand-new navigation screen. Some explanation is required.



The major change is the use of **ROLES** in the new WebCRD. Depending on your level of access, you can perform tasks based on the chosen role. At the upper left corner is a *yellow pulldown* menu listing the ones available to you.

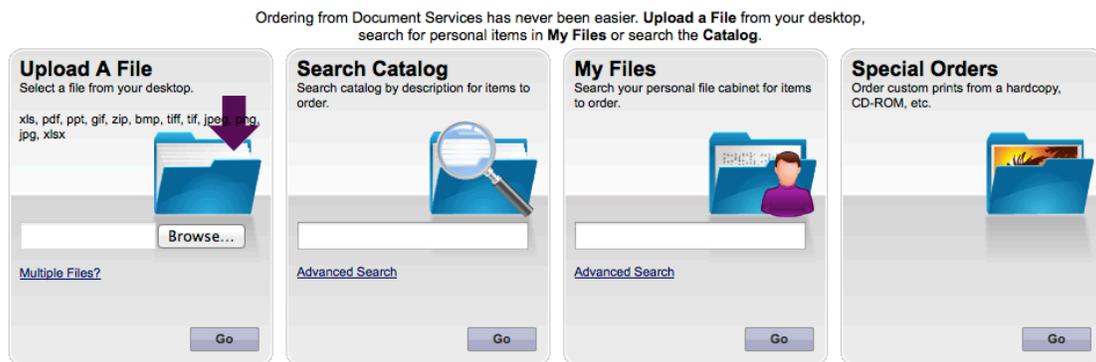


For most people, you will be using either **ORDERING** or **FORM ORDER**.

If you are placing a new order, choose **ORDERING** from the menu. You should see the label "Ordering" next to the yellow ROLE tag.



On the screen, you will see four panels outlining the types of jobs you can submit.



1. The first panel allows you to upload your own files to the system. Please note that we are best equipped to handle **Adobe Acrobat PDF** files. All other file types will require conversion and adjustment before they can be processed. This may cause unexpected changes in the colours or typefaces used when printed.
2. The second panel allows you to search the online catalog for available job templates that you can use (*such as those found in Forms Orders*)
3. The third one allows you to choose those files that you have saved in your personal file cabinet for reprinting. We recommend that you use this capability for any jobs (along with their specifications) that you intend to reprint or re-submit annually. *Older jobs past the default retention period of 180 days are regularly purged from the system automatically to make room for newer jobs and files.*
4. The last panel allows you to request orders for jobs that do not have digital files available such as for hardcopy, scanning or CD/DVD duplication.

Once you submit the order, you will see familiar screens from the shopping cart describing your job request. At this point, you can specify additional instructions to customize your job. Ensure all the shipping and billing information is accurate before you place the order and get your receipt.

To return to the main screen, choose **HOME** from the top menubar or **LOGOUT** to exit.

FORMS OR TEMPLATE-BASED ORDERING

For forms or template ordering, choose **FORM ORDER** as your role.

A screen will display all the public templates available for SFU users organized by type.

Roles Form Order Proxy Home | My Profile | Help | Logout

SFU DOCUMENT SOLUTIONS

Welcome, Dennis, to WebCRD!
Select a workgroup from which to choose items

Item Search Item Form # Rows Per Page 25 Search Clear

Workgroup	Department	Dept.	Folders	Items
SFU Letterhead	SFU Document Solutions	Letterhead Template	1	1
SFU Templates			4	5

[1-2] of [2]

Cancel Update This Order Place Order

Order Summary
Order not yet started. Please select an item

Cancel Update This Order Place Order

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Choose one topic area and a list of available templates with their descriptions and thumbnails will appear.

Choose the **Configure** button next to the item that you want and enter your information into form provided. An online preview is provided as your online proof. Please check that all your information is correct before continuing with the order. Indicate the desired quantity, place the order and get your receipt.

APPROVING JOBS

If you are someone who approves job requests, choosing **APPROVAL** from the Roles tab will bring up a screen showing jobs requiring your. Select the job and the **APPROVE button** at the bottom of the screen to release the job into Production or to initiate processing.

NEED MORE INFORMATION?

This is a brief overview of changes in how to use the new WebCRD interface. If you have any questions or require more in-depth assistance, please contact Document Solutions at **778.782.4160**, email docsol@sfu.ca or visit us at Room 0001 of the Maggie Benston Centre.

Over the next few weeks, we will add new features to the system to provide you with more options and capabilities. We think that you'll like them.