



QUICK START GUIDE

WebCRD 11

OCM BOCES Print Shop
henryprt@ocmboces.org
4/21/2020

Welcome to WebCRD 11

The newest version of WebCRD is Version 11. The look of the site is generally the same as previous versions, however the “Preview/Change Options” selection in the cart view will reveal a different look by shifting printing choices to the left side of the screen, and showing all modifications in real-time. Despite the difference from the previous version, the new Change Options page is vastly improved and more user-friendly. Some exciting changes include:

- Drag and drop documents to put them in your cart
- Right-click functionality for setting covers, choosing plex, paper type, and adding blank pages
- Option to electronically enlarge documents (perfect for making an 8.5x11 document into 11x17)

You will get a better sense of the new functions by using the system, but in the meantime to provide a point of reference, we have included some screenshots from navigating through the new version.

Upload a File to the Cart: Same Look with new drag and drop functionality

On the home page, you can now select multiple files from your computer and drag them onto the “blue cloud”. You can also “click to browse”, and then select your files to upload.



Once you have dragged your files into the upload area or otherwise selected them, they will be placed in your cart. If you dropped multiple formats, you will see their progress in the cart as they are converted into PDF. From within the cart, you can begin to set your printing options for each document.

- You can “Provide an Optional Name” to the order. This name is for your benefit and allows you to find your order easier when searching order history.

- You can set quantity.
- You can remove the file from your cart using the small “trash can” icon next to Replace File.
- You can “Replace File” which allows you to choose a different file to replace the current file.
- You can “Continue Shopping” which will close out your cart, leaving your order intact.
- You can “Start a New Cart” which will allow you to save, or clear out your current cart.
- You can “Preview/Change options”.

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

Cart

Cart ID **544384**

Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Order Site OCM BOCES

Provide an optional name for your order.
Naming your order can be helpful for reordering.

Item 1
✖
Replace File
Continue Shopping

WebCRD ORD GettingStarted UG.pdf

22 Pages

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

Quantity

Your Selected Print Options Print **B/W, 2-Sided, white 8.5x11 20lb., Scale Down Only**

[Preview / Change Options](#)

Copyright Notice

Materials submitted for printing or processing may be protected by copyright law (Title 17 U.S. Code). By checking this box, I warrant and confirm that I have rights to duplicate the materials provided, and in doing so, no copyright will be violated.

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

Shipping Information
Add Address

I would like my order shipped by: **Friday, April 03, 2020** *Note: Only dates when the print center is open may be selected.*

Scott Nickerson

CNYRIC Rodax
Project Manager
OCM BOCES
6075 E. Molloy Rd.
Street2
Street3
East Syracuse, New York 13221
United States
snickerson@cnyric.org

Select a Shipping Method

Local courier

Delivery Estimate
Monday, April 06, 2020

Ordered Items	Quantity
1 WebCRD ORD GettingStarted UG.pdf	0

[Enter shipping instructions for this recipient](#)

Billing Information
[Enter billing instructions for this order](#)

Scott Nickerson

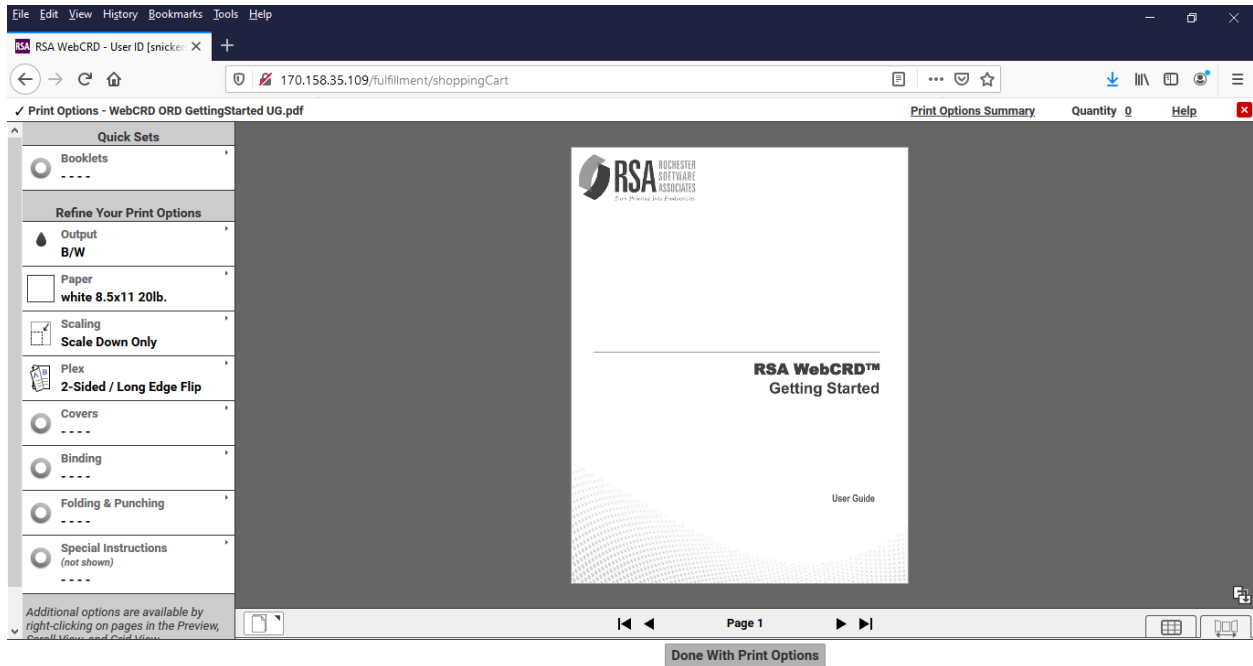
CNYRIC Rodax
Project Manager
OCM BOCES
6075 E. Molloy Rd.
Street2
Street3
East Syracuse, New York 13221
United States
snickerson@cnyric.org

Start a New Cart
Continue Shopping
Place Order

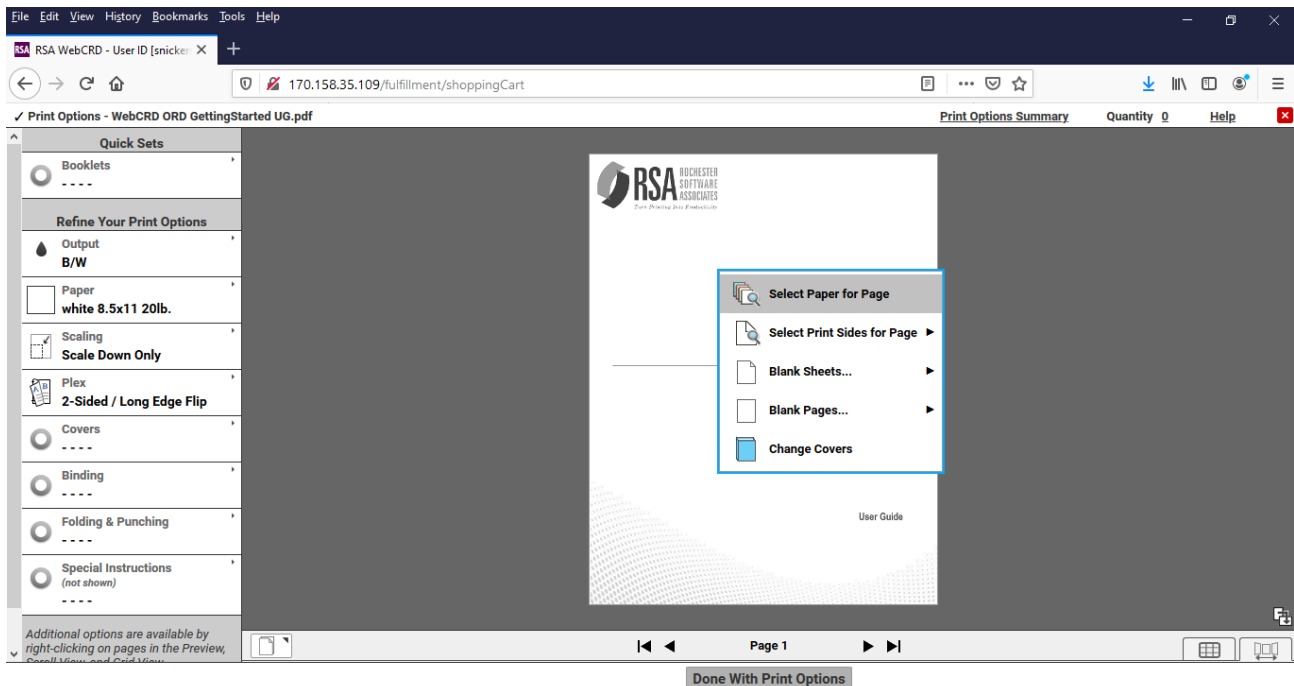
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“Preview/Change Options” Screen

Once you click the “preview/change options” link, you will notice the print options are located on the left side of the screen.



There is now right-click functionality in WebCRD for setting page options. Simply right-click on the page image and some options will pop up as in the screen image below. Options include “Select Paper, Select Print Sides, Blank Sheets, Blank Pages, and Change Covers (only appears on first and last page of document).”



Print Options (left side of screen)

Quick Sets- Booklets:

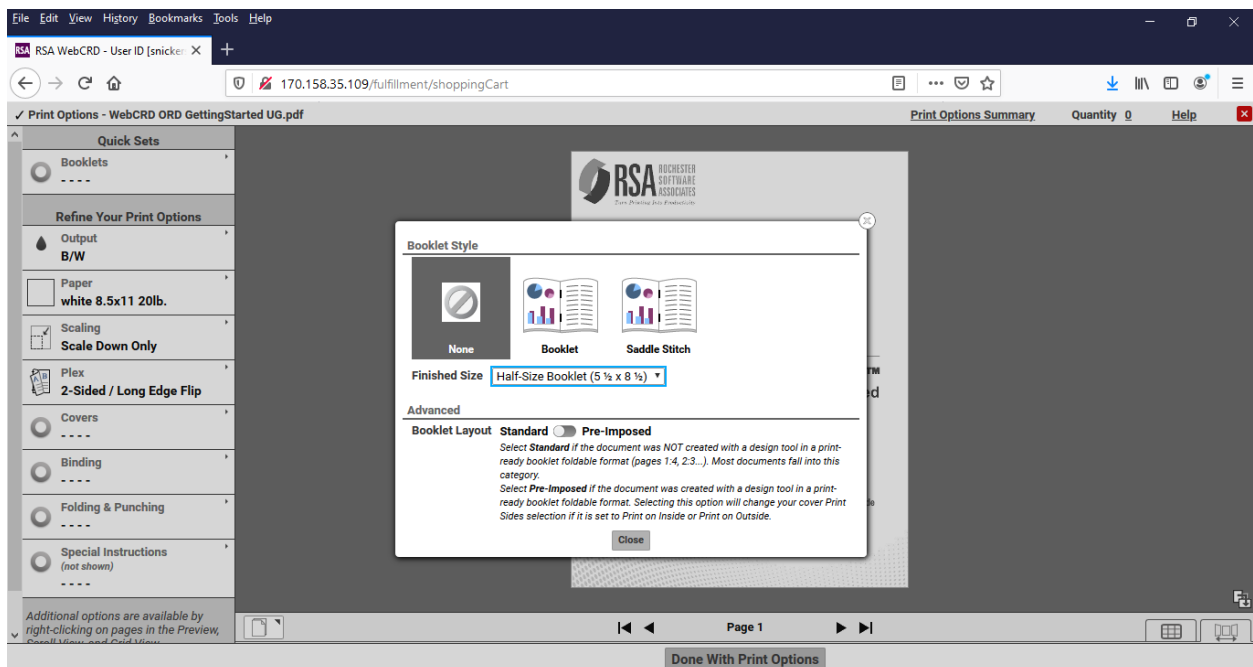
Booklet Style

Choose **Booklets** if you want your document imposed (made) into a saddle-stitched booklet. For reference, a saddle-stitched booklet uses the same binding as a school musical program, or a Regents Exam reference table. The document has two staples in the middle of the sheet and is folded in the middle. Booklets are fairly durable and can be produced quickly for fast turn-around time. Select **Saddle Stitch** style if your file is pre-imposed (already laid out as a booklet)

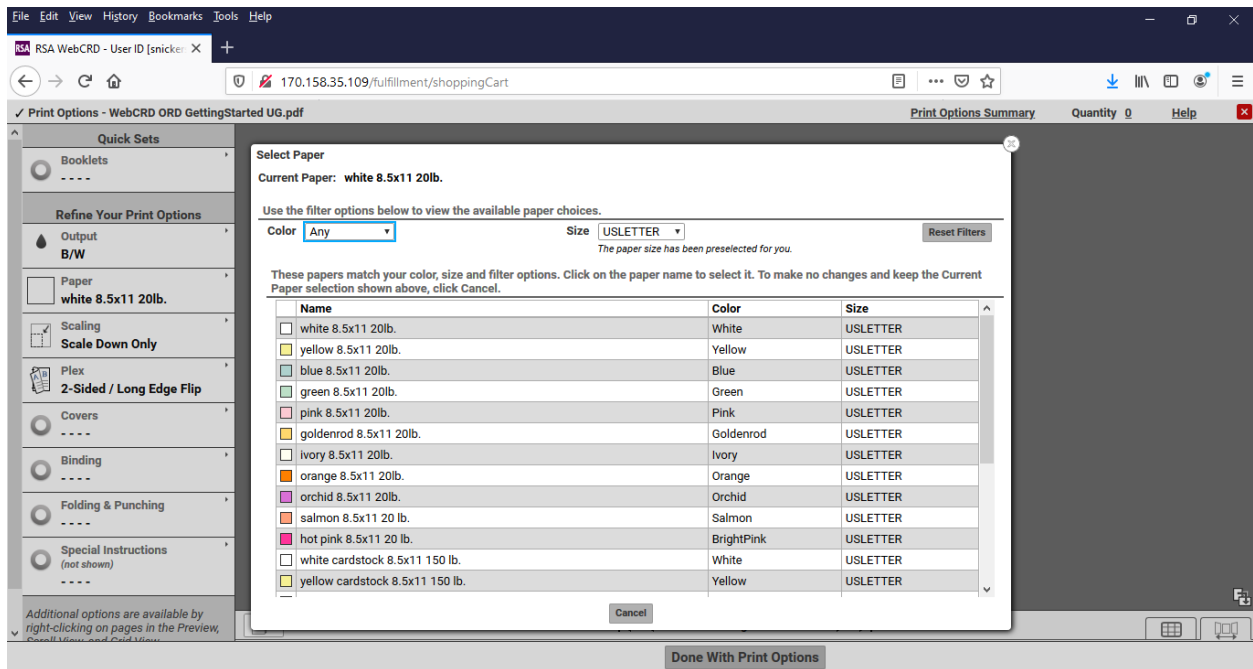
Finished size – choose the size your booklet will be when printed and folded.

Advanced- Booklet Layout – Standard means you have a document comprised of individual pages (most documents). WebCRD will turn your document into a booklet (imposition) so when folded, the pages are in the correct order. Select Standard to create a booklet.

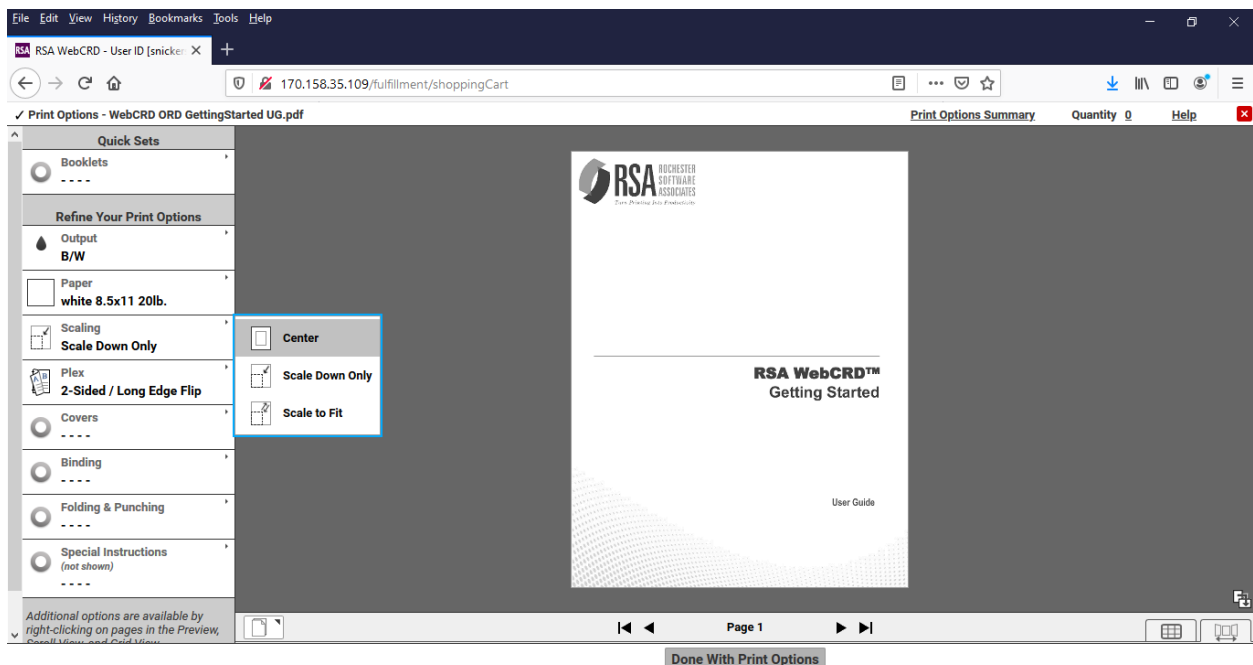
Advanced – Booklet Layout – Preimposed means your document is already laid out as a booklet. This means two pages per sheet. Some elementary readers are laid out this way. Selected Preimposed if your document is already set up as a booklet.



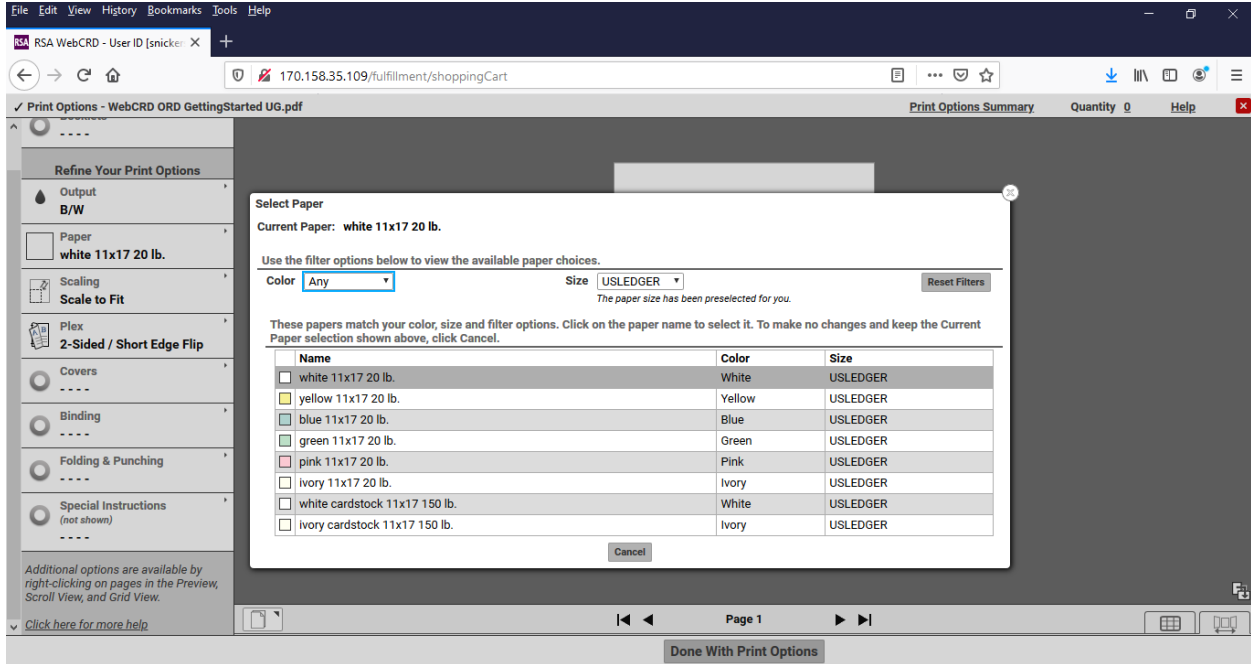
Paper menu – all available stocks are listed on this screen. For different size stocks, choose the Size drop down. USLetter, USlegal, and USLedger are the three common sizes. Size 14.33x20.5 is for posters only.



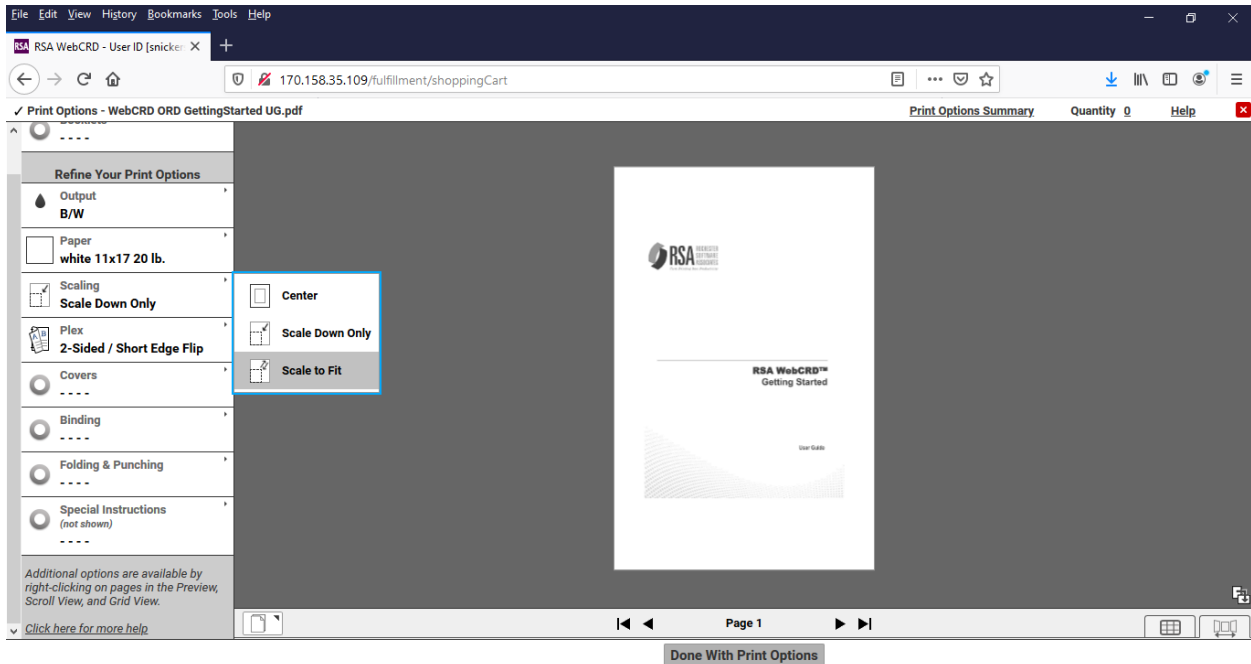
Scaling – this is a new feature in WebCRD. You can enlarge or shrink your document to fit the paper stock selected. You can also center the document in case it is an unusual size. This feature is very useful when enlarging a letter-sized item to 11x17 ledger size. When you make this selection, the preview image will be updated.



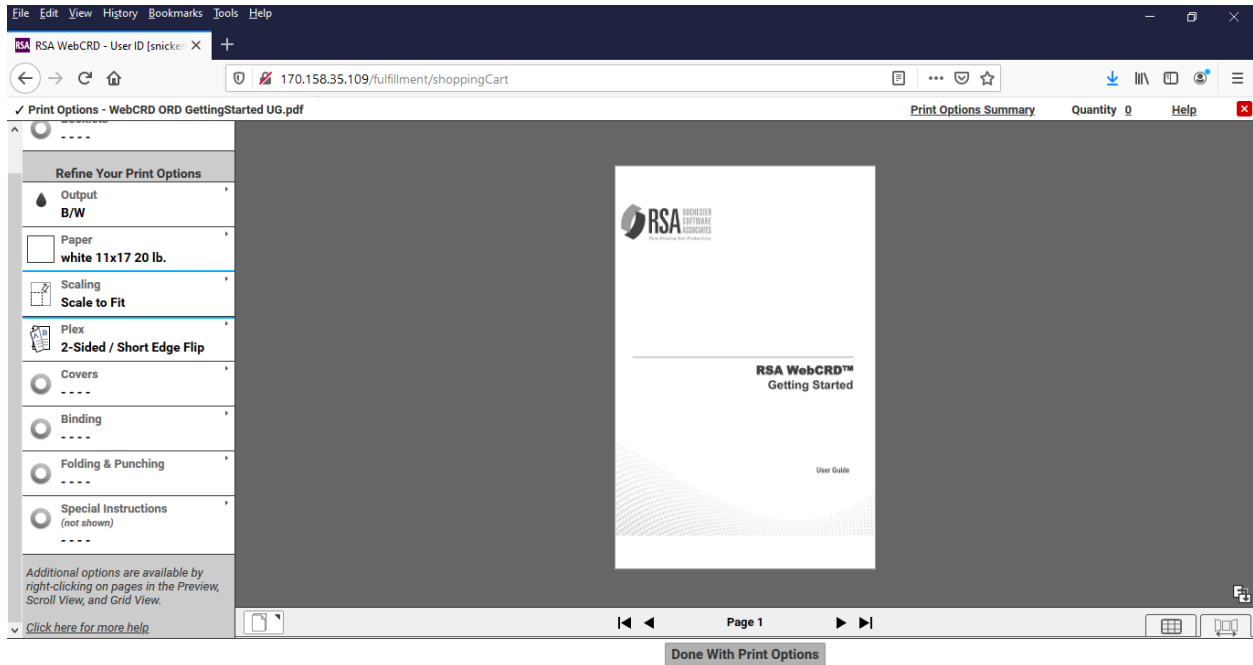
Select the new paper size (most common for enlarging is USLEDGER 11x17)



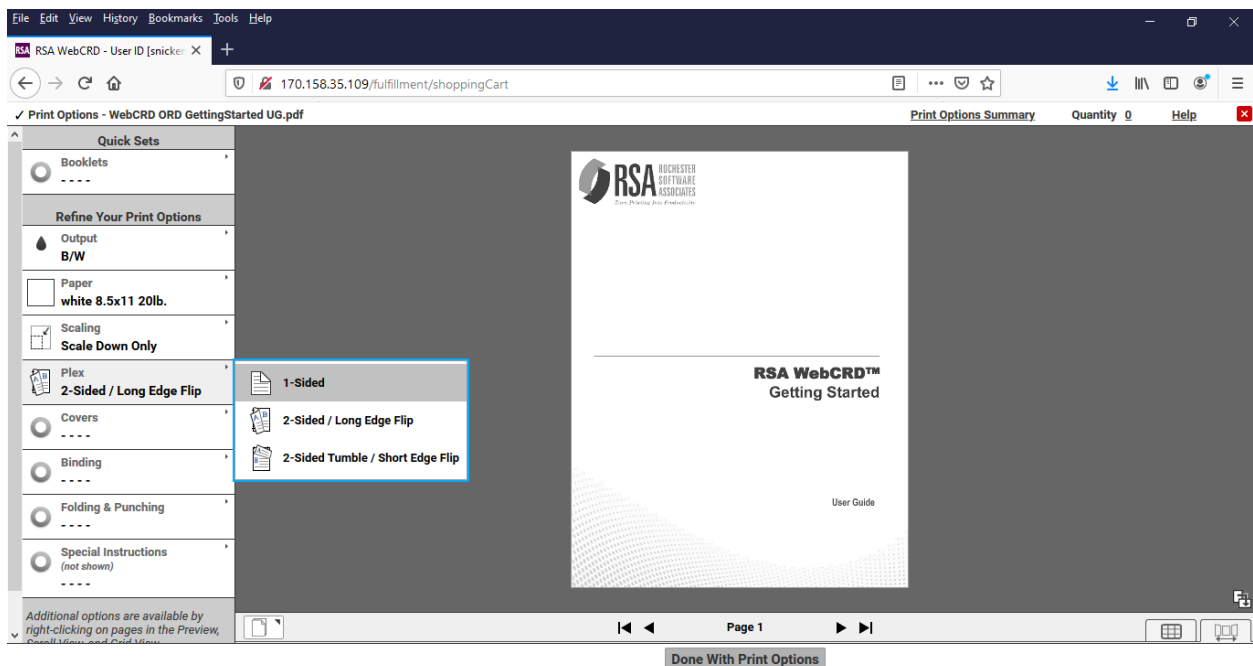
Select **Scale to Fit** to enlarge. WebCRD will now make your letter sized document ledger sized.



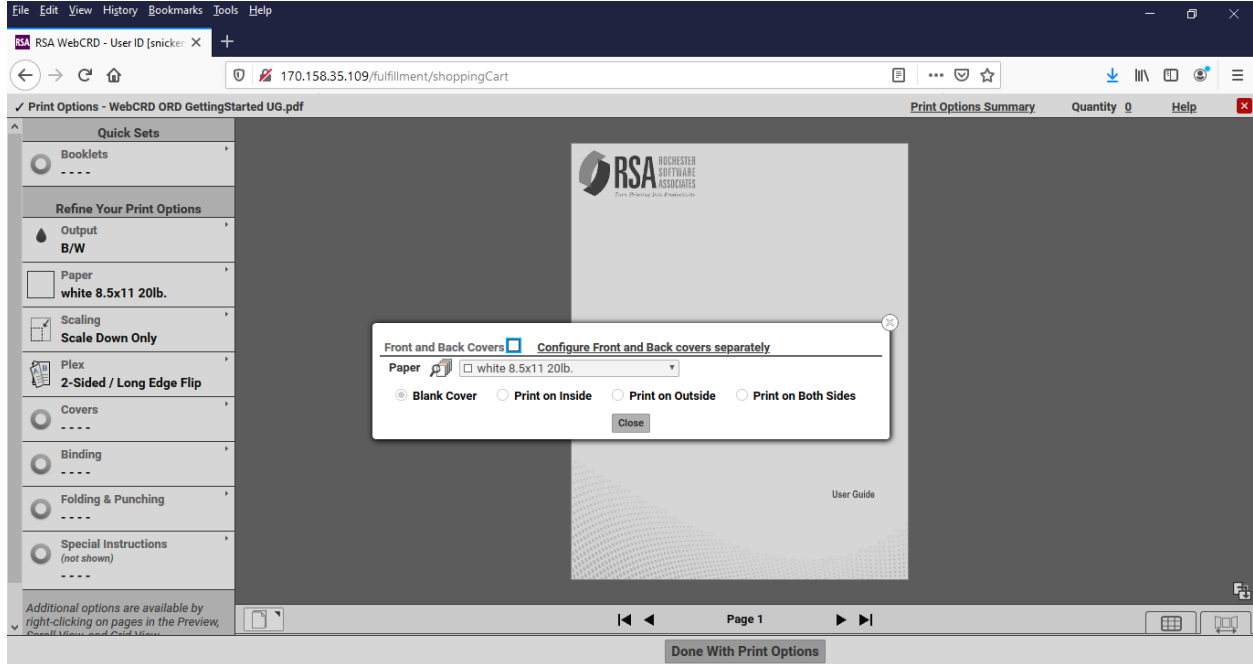
Your resized document appears in the preview panel as an 11x17 image.



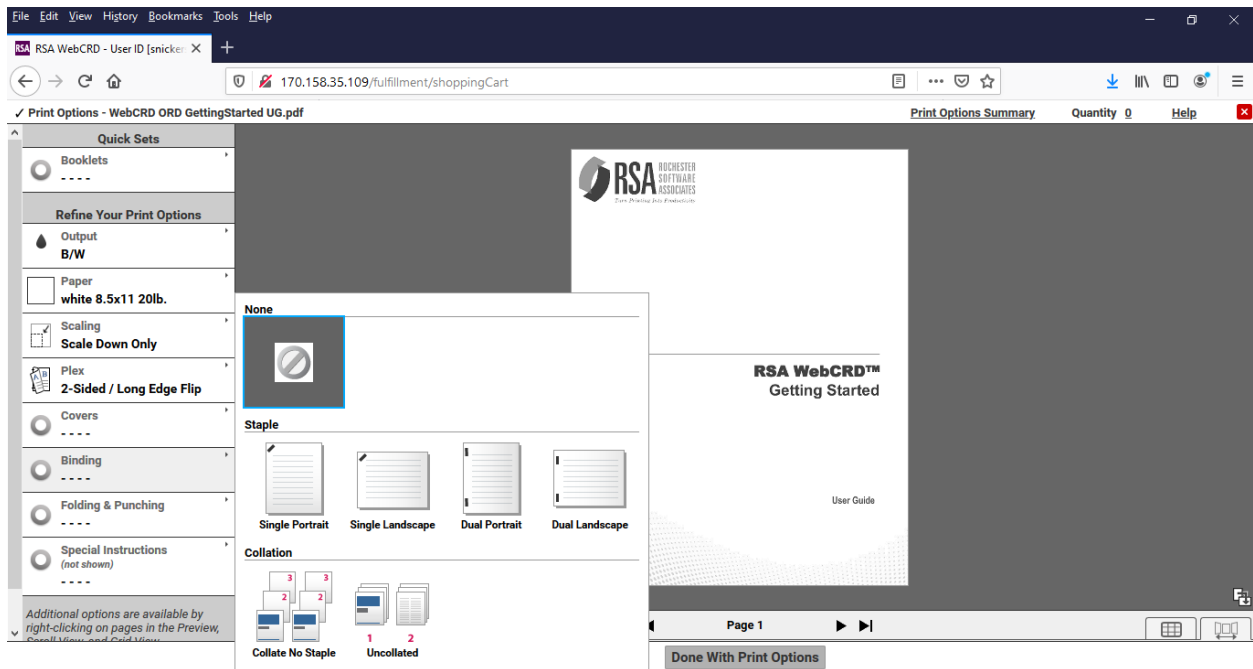
Plex – you can choose from one-sided and two-sided copies. For letter-sized paper, a long edge flip leaves both sides with the same image orientation. A short edge flip will cause both sides to have opposite orientations. For legal and ledger-sized paper, the opposite is true. A short edge flip will result in both sides maintaining the same image orientation; long edge flip will result in both sides having opposite orientations. You can see the results of your choice on the preview image.



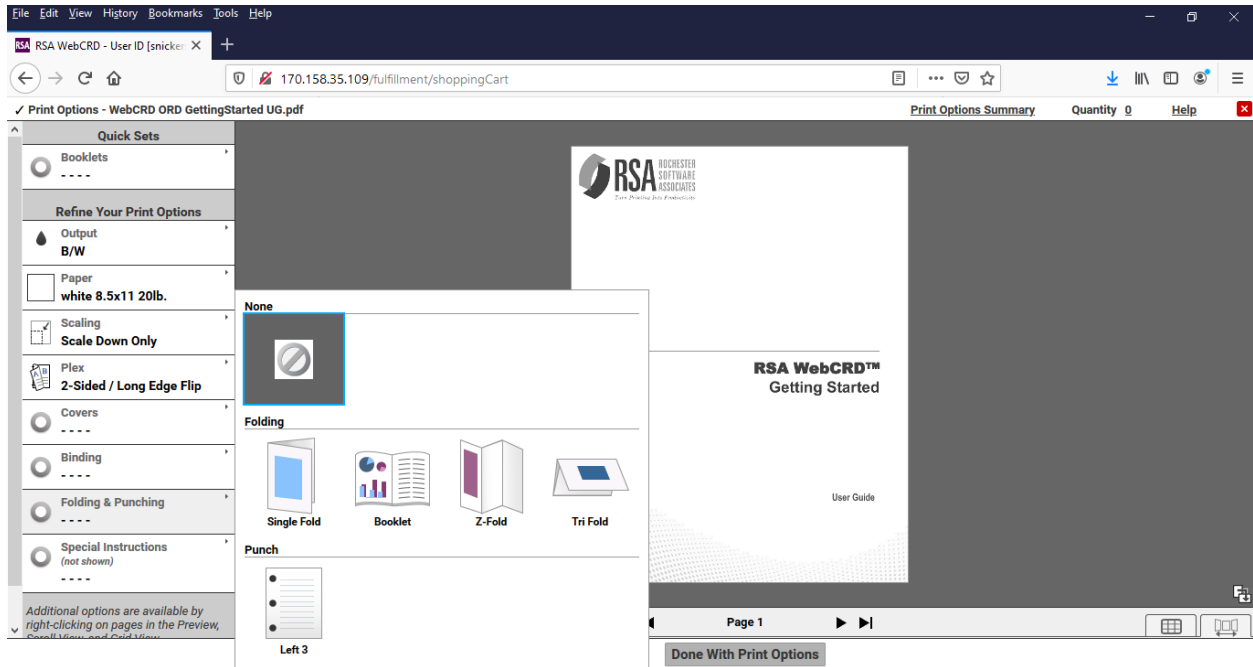
Covers – select front and back covers, different paper stocks, and printing. “Outside” is the side facing the reader. For a front cover, you generally want printing on the outside. Back cover is usually blank, or with printing on the “inside”.



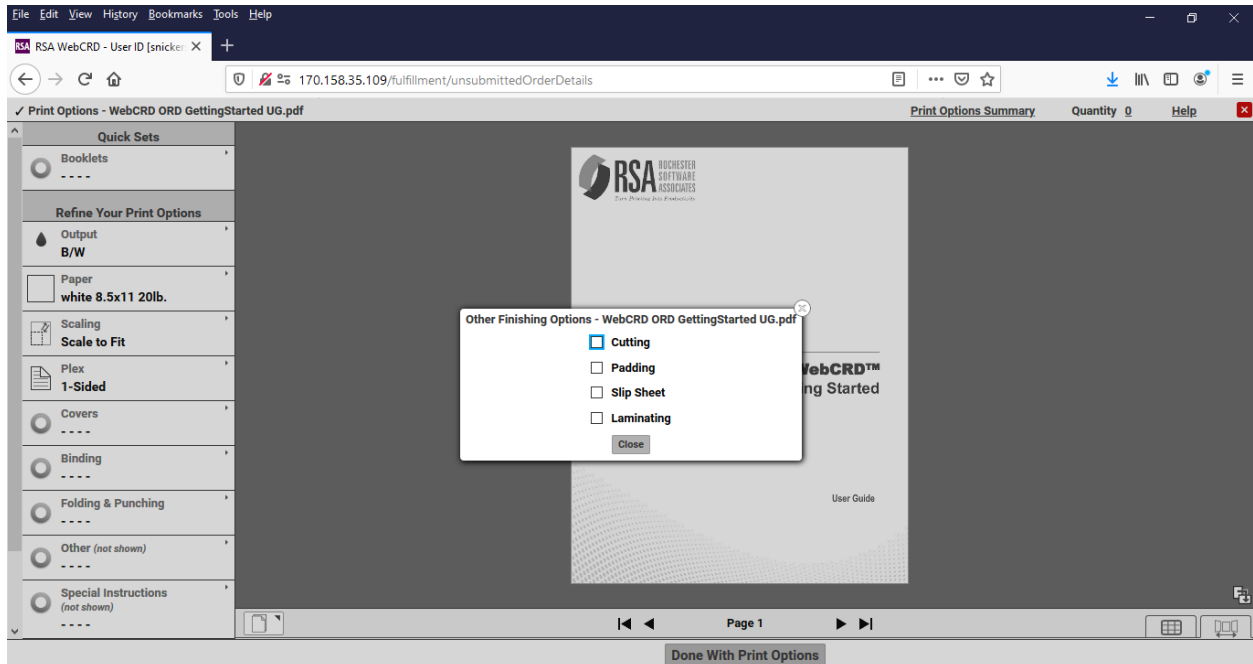
Binding – this tab allows you to choose a binding type, and Collated or Uncollated sets. Options include corner staples, side staples, black tape, and comb binding. None is the default setting.



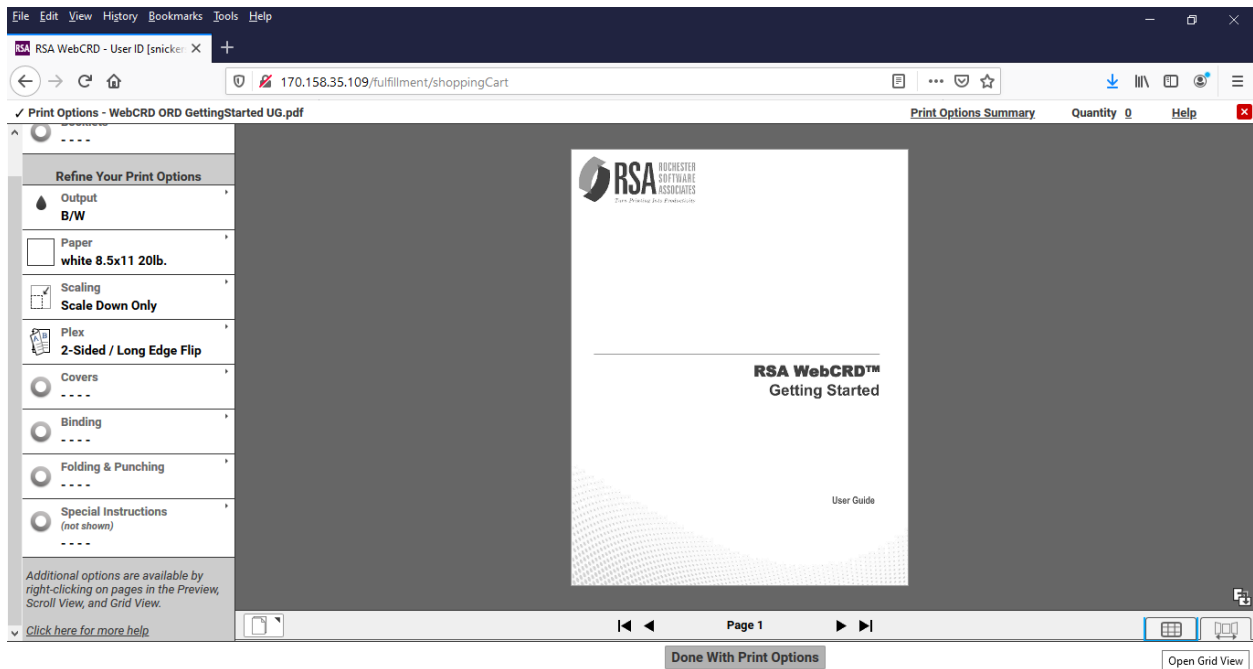
Folding and Punching - this tab allows you to select document folding or three hole punch.



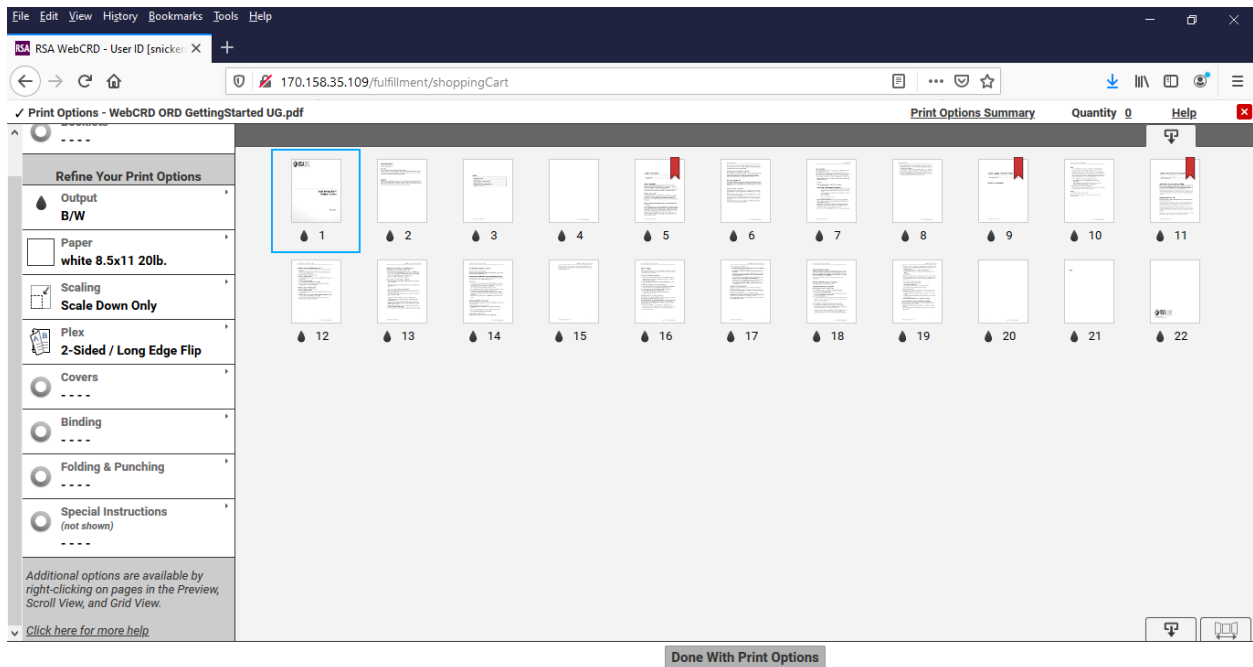
Other – the “other” finishing options include Cutting, Padding, Slip Sheet, and Laminating.

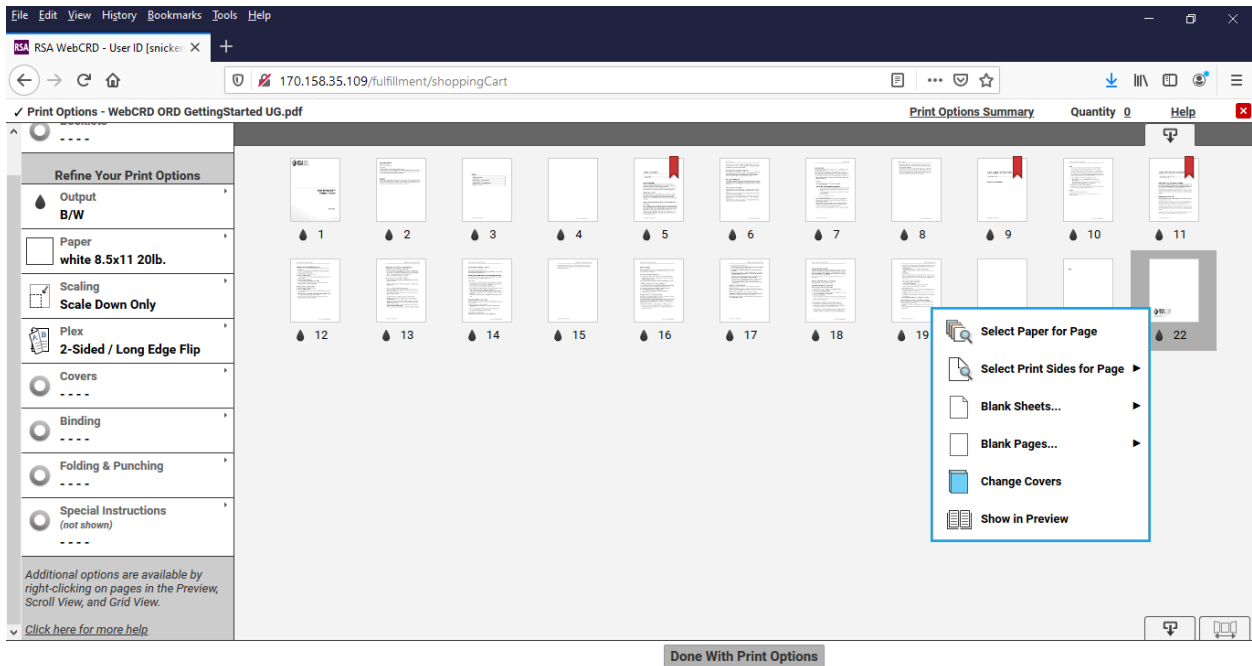


View Options - To toggle View options, look in the lower right. If you click on the “grid icon” you will Open Grid View and see pages displayed side by side.

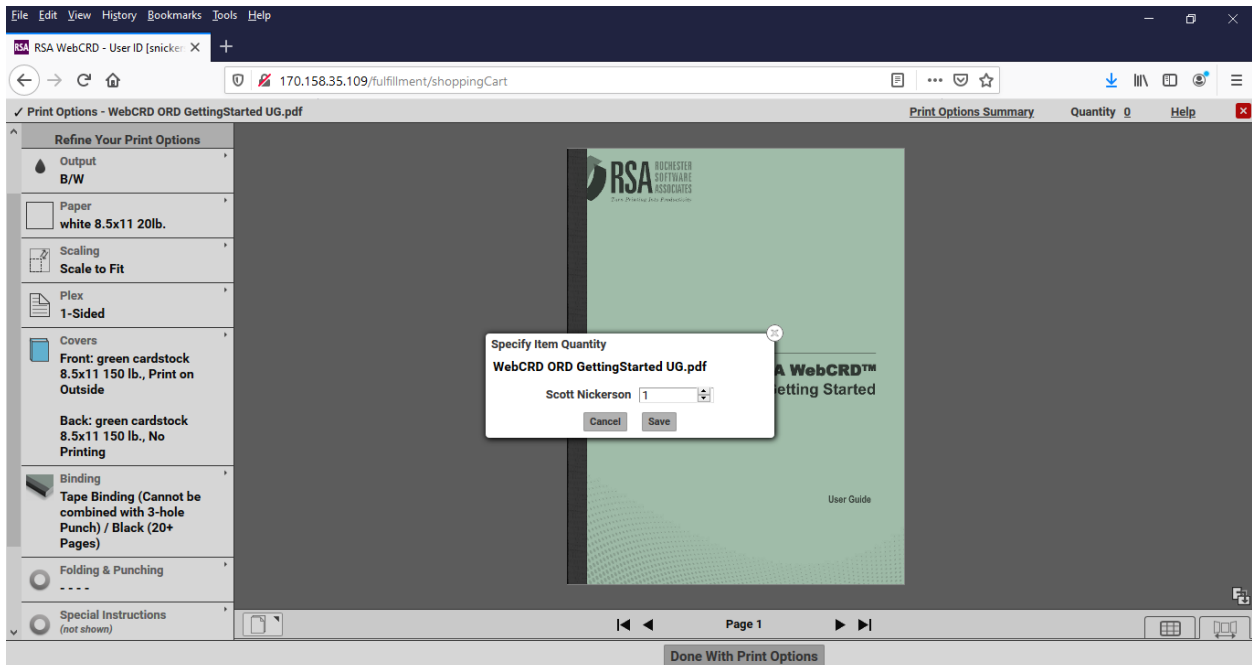


In **Grid View**, You can then right click on the various pages and create exceptions (add a blank pages, set the plex and change paper stock).





Setting Quantity from within the Print Options page – in the upper right the quantity is displayed. By clicking on this number, you can change the quantity. Enter the number you need, then click Save. Now, click Done with Print Options to return to the cart.



Cart View and Ordering

Quantity - to set quantity, click on the Quantity box on the right side of the cart.

The screenshot shows a web browser window with the URL 170.158.35.109/fulfillment/shoppingCart. The page title is "Cart" and the Cart ID is 544384. The Order Site is OCM BOCES. The page contains several sections:

- Provide an optional name for your order:** A text input field with a note: "Naming your order can be helpful for reordering."
- Item 1:** A table with one item: "WebCRD ORD GettingStarted UG.pdf" (22 Pages). The quantity is set to 1. There are buttons for "Replace File" and "Continue Shopping".
- Your Selected Print Options:** A section with a "Preview / Change Options" button. The options are: "Print B/W, 1-Sided, white 8.5x11 20lb., Scale to Fit", "Binding Tape Binding (Cannot be combined with 3-hole Punch) / Black (20+ Pages)", and "Covers Front - green cardstock 8.5x11 150 lb., Print on Outside Back - green cardstock 8.5x11 150 lb., Blank Cover".
- Copyright Notice:** A checkbox for "Materials submitted for printing or processing may be protected by copyright law (Title 17 U.S. Code). By checking this box, I warrant and confirm that I have rights to duplicate the materials provided, and in doing so, no copyright will be violated." There is also a checkbox for "Provide a sample of the document before processing my order."
- Enter special instructions for this item:** A text input field.
- Shipping Information:** A section with an "Add Address" button. It includes a shipping date selector set to "Friday, April 03, 2020" and a "Select a Shipping Method" dropdown menu set to "Local courier".

Shipping Information - to send to multiple recipients (team mates or other teachers), click on Add Address.

- **Select an Address** if you have already added contacts to your address book.
- **Select a Distribution List**- after you add contacts, you can create a Distribution List to be used when you need to send the same people a number of materials for a particular order. You can define in the Distribution list how many copies each person gets.
- **Create a New Contact** – use this option if you wish to add a recipient for the first time.

The screenshot shows the same shopping cart interface as above, but with a dialog box open over the shipping information section. The dialog box has a "Cancel" button and three options:

- Select an address:** Click to add another ship address from your contacts list.
- Select a distribution list:** Click to add multiple addresses specified in a distribution list.
- Create a new contact:** Click to add a new address for this order and add it to your contacts list.

The background shows the shipping information section with the "Add Address" button highlighted. The shipping date is still "Friday, April 03, 2020" and the shipping method is "Local courier". The contact information for Scott Nickerson is visible in the background.

Finalize the order- set your due date, and click Place Order. You will receive a receipt with an order number.

Order Submitted
Your order 544384 has been submitted for processing.
An order confirmation email will be sent to you (if enabled). [Print Receipt](#)

Order Information

Order Name Order 544384 03/31/2020	Order Number 544384
Submitted On 03/31/2020 11:38 AM	Requested ship date 04/03/2020
Customer name Scott Nickerson [snickerson]	Site OCM BOCES

Ordered Items

Ship to Scott Nickerson

Qty	Item / Form #	Workgroup / Folder
1	WebCRD ORD GettingStarted UG.pdf	snickerson default

Billing Information

Scott Nickerson Project Manager CNYRIC Rodax OCM BOCES 6075 E. Molloy Rd. Street2 Street3 East Syracuse, New York 13221 United States	Phone / Email snickerson@cnyric.org 433-2229 (Work #) Phone2 (Mobile #) FAX (Fax #) Phone3 (Home #) Account Codes
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Assistance

Near the upper right corner of every screen is a Help link. This information is kept up to date by vendor RSA, and offers very detailed instruction. Clicking Help is a fast way to answering a WebCRD question.

OCM BOCES Help Desk – 315-433-8345

helpdesk@cnyric.org

Thank you for using WebCRD.

April 2020