Cad Cam Services / User Guide / ISP

Cad/Cam Services, Inc.

Standalone

Online Digital Document Creation, Management and Distribution

USER MANUAL

Search Item Page No.
Cad / Cam Services' ISP 4
How to Order a Document 5
Step 1 5
Step 2 5
Add Recipients 6
Master Address Book 6
Master Address Book Group 6
Remove Recipients 6
Customized Shipping Address 6
Special Delivery Notes 6
Items in Shipping Cart 7
Send the Originals Option 7
Return the Originals Option 7
Delivery Option 8
Transmittal Option 8
Step 3 8
Step 4 8
Uploading Files 8
Uploading Multiple Files 8
Additional Features 8
Address Book 9
Add Employee 9
Add Contact 9
Import Contacts 9
Export Contacts 9
Manage Groups 9
Send Emails 10
User Permissions 10

Edit Groups 10
Create New Group (Quick/Advanced) 10

My Account 11
Account Preference 11
My Profile 11
Upload Account Logo 11

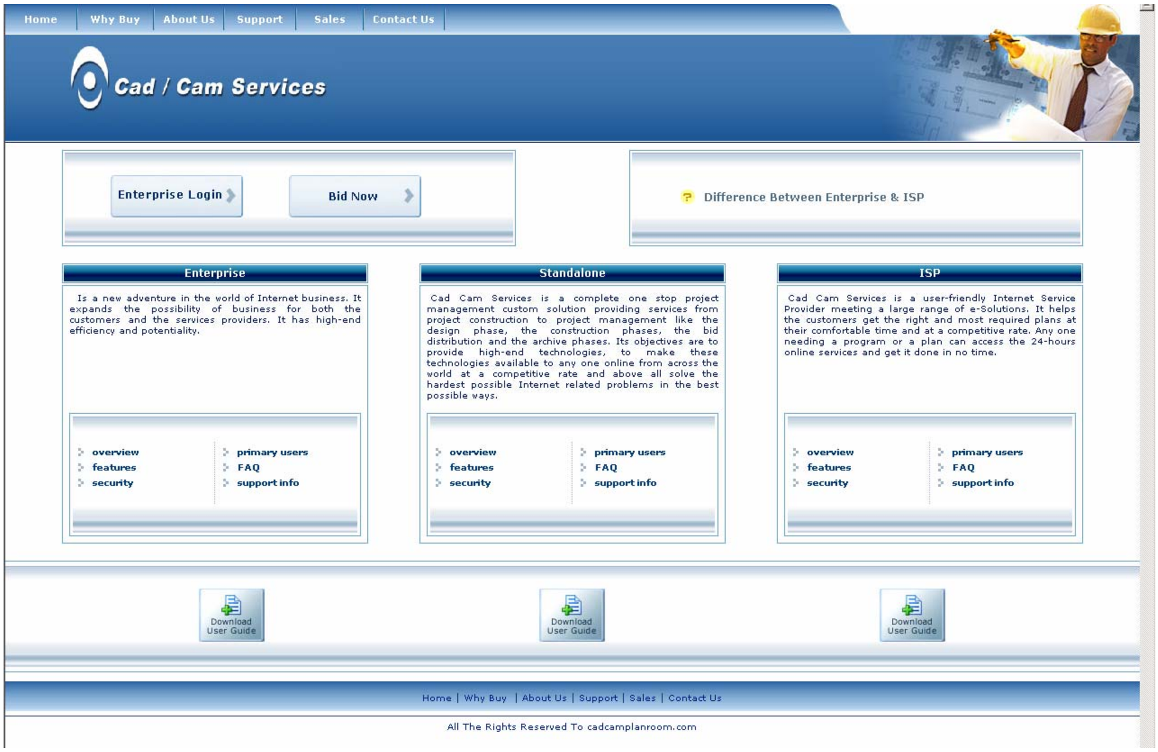
Order History 11
View Order Details 11
Re-Order 12
Re-Upload Files 12
Delete Order(s) 12

Cad Cam Services' ISP

Cad Cam Services is based on simple principles of Internet enabled systems for online digital document creation, management and distribution. It is user friendly and can be managed by any one very easily. You can create a document, save it for present and future use and order online without any problem. It facilitates on maximum aspects of online document handling. It meets a wide range of e-Solutions from creating a document, editing, searching, ordering online and bid management etc.

Cad Cam Services runs on any current browser like **Microsoft Internet Explorer v.5.5** or higher or **Netscape v.6.0** or higher so it is easy to work on any standard browser as it needs not require any special software or tools

To work in the ISP portal you have to enter it by using username and passwords sent to you when you opened an account with Cad Cam Services Plan Room. For only registered members are allowed to work in this portal; non-registered members cannot enter into it like that of Enterprise portal. However you can create your account instantly if you need to work and do not have an account.



Once entered into ISP a menu demo with many options will appear on the screen. Select “Repro Services” menu to work in collaboration with the reprographer who will help you in progressing and forwarding the order till end.

How to Order a Document

Ordering a file is a 4 step process in connection with the reprographer.

Step 1

Select “Repro Services”. Go to “Print” option. Decide well which type of works you require and select the order process from the drop down menu as per your need. Then upload your work for the order. Remember only single file or **one.zip** can be loaded at a time. However you may add as many files as you want to have by following the above rules separately for each document. Upload one file once and by repeating this method you can upload many files for placing them in one order.

Or you may add a document for order by typing the name or a short description of the file of the hard copy in originals. Then choose the production option how you want to produce your document. Soon you will see a default printing option popping up which can be edited by you before finally adding your items to the

Cart. Send the items to the cart by the “Add to Cart” option. Now you are able to see all the items selected by you in the **Shopping Cart**. Here you can edit, remove or empty any (or all) items of your choice with the help of the “Edit”, the “Remove Items” or the “Empty Cart” menus. After completing these processes click on the “Next” button to continue. But if you have opted to require a Job Name, Job Number or PO No on orders then indicate this information also before continuing further.

Step 2
Delivery Option clears the project to be delivered to the persons (individual or company) you would like to send. This option works very much like the delivery option in the Enterprise. You have to opt all the details regarding how many projects you are ordering, to whom you would like to send them in a simple matrix etc. All the persons with whom you are working are listed clearly like the **recipients** are shown in the left column, **shopping cart** items in the center and **delivery option** at the right. And the transmittal information may be fixed from the options listed at the bottom of the window.

You can deliver the works to any number of the recipients. Once you have selected the recipients you can even add more and more recipients to distribute the documents. You can manage the distribution process by four available options –

Add Recipients: Clicking on the “Add Recipients” button will take you to an address book window from where you select any number of recipients. You can use the search features to search recipients by specific name so as to find them fast.

Master Address Book:
It has a detailed list of all employees with their contact details, the names of their companies and the works assigned to them.

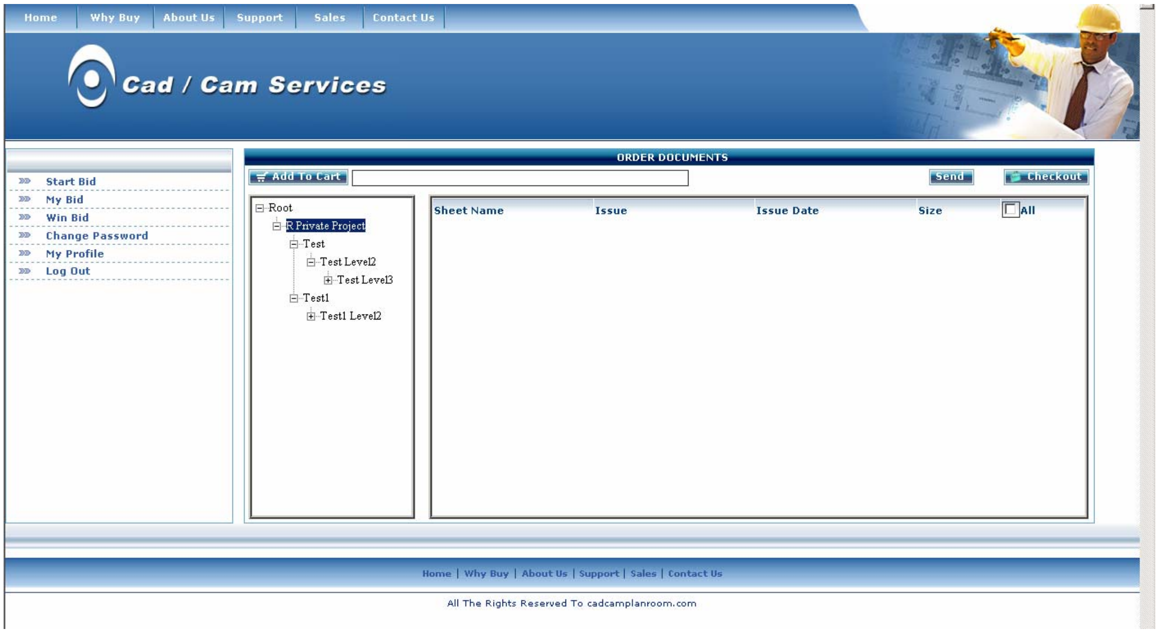
Master Address Book Group:
This address book is created taking the users from the master address book and is grouped in Type on the basis of specific category of trade, company or other specialties.

Remove Recipients:
During the process you may have selected some recipients by mistake or you may want to deselect some for other reasons then you can remove these users by selecting their names and then clicking on the “Remove Recipients”.

Customized Shipping Address:
This option facilitates you to make edition on delivery information. Every time you make changes you must save them with the “Save Changes” that are but temporary changes.

Special Delivery Notes:
You may need to send some special information to a recipient that can be done by this option. This delivery is however send to only selected users.

Items in Shipping Cart:
For clearing the delivery you have to give details on quantities for each item for the recipients that are recorded in the shipping cart. These orders can be viewed by selecting the number that is assigned to each item.



Send the Originals Option:
After making all details on the orders now you require to work with the reprographer who will produce the document on your behalf. You should send the originals through one of the following options that certainly require careful attention.

“I require a pick up” **“I’ll drop them off”**
“I’ll upload with the order” **“Already on file”**

Return the Originals Option:
As you are sending the original copies of your work to the reprographer you would want him how to deal with your file. You may ask him to return the original files through either of the options

Select a delivery method either universally or individually or in both ways, due date and due time etc. by using the ‘apply down’ arrows from 3 different ‘apply down’ arrow clicks.

Transmittal Option:
Now place the transmittal details in the Transmittal Option by selecting either of the following options as you require for your purpose

“No Transmittal” – No transmittal holds up a transmittal for the time being.
“Standard Transmittal” – Helps in customizing text in the transmittal to the selected recipients.
“Attach Custom Transmittal” – You can attach custom transmittal to the location you prefer.

Step 3
Select “Review” option to verify all the details you have made. You can see the items along with price quote and if you want to edit or make changes you can edit the information but if you find every thing fine click on the “Submit Order”.

Step 4
On submitting your order(s) you will soon get a confirmation from the reprographer with an order number. Now you can send the order for print distribution, print the complete order as you like or return to the project home.

Uploading Files
For uploading file(s) click on the “Upload Now” from the upload window that will pop up automatically via FTP. You will get a confirmation message if the upload is complete successfully with **Upload Successful**.

Uploading Multiple Files
Though you can upload one file at one time it is possible to upload multiple files one by one and order for them in a package.

Additional Features
Additional features are specially created for managing the files and documents for some special purposes however these features may not be available to some users for certain reasons.

Address Book

This address book gives details on all the users. You can view them users through "View User Details". You can even delete a specific user by using the "Delete User" button.

Add Employee

This tab provides the facility to add new employee(s). It is advised that all information of a new employee like log in information, permission specs and order dollar along with assigning trade limit should be added to work well and search for a purpose later. Assigning trade is done by "Edit Trade" menu and adding new trades by "Add New Trade".

Add Contact

For adding an additional contact click on the "Add Contact" and go ahead with other processes.

Import Contacts

By "Import Contacts" link it is easy to import any number of users. Specify the program you are to import contacts from and then browse to the location of the files containing your own contact information. If a column header is present indicate it too. Then move onto "Next" to continue the Import process. Match the fields as per our requirement and to proceed with works easily with the link "Match Address Book Fields". Click on the "Next" to finish the import process.

Export Contacts

This process is not much different from the Import Contacts. Sometimes you require exporting your address book for review. Click the "Export Contacts" and then download either the entire address book or select the users by group and then click "Export". Indicate a location where you want to save the exported files. Now the saved files are ready to be viewed by any one.

Manage Groups

Manage Groups window is a detailed address book of the users. With the help of this window you may create a new group or edit an already existing group. Import the users from the master address book and create a new group by Type. Select all those users you want to allow them participate in a certain project. Then save these users by the link "Save as New Group". If you are editing an existing group then save the changes through "Save Changes to Selected Group".

Send Emails

During the work process you may need to send information to the users for communicating your side. This is done by the window "Send Emails".
Click on the "Send Email".

Define your email blast name.
Select either of the “Show All Employees”, “Show All Contacts” or “Show All Users” options.
Select the recipients and then click either of the buttons [To >>], [CC >>], [BCC >>].
Finally type the message and send it by “Send Email Blast”.

User Permissions

For different users you may define different sets of permissions for work process. Also that you can edit the permission later as it suite you for your benefit. If need to edit the permission then select the employee, define the permissions and click “Save” to fix it. Remember that the permission can be edited and re-edited any time and for any one.

Edit Groups

While working you may need to edit Group Membership for various purposes. This is possible by the following two processes –

1) Quick Edit and 2) Advanced Edit

1) Quick Edit: This option lets you view the master address book. Select and add the users to the group by highlighting the users in the “Available Users” link. Click on the [>>] button to add them to the “Current Group Members”. But the members can be edited, removed or again added as the need would be.

2) Advanced Edit: This option lets you edit on a number of things for the users by using the detailed address book as well as the search criteria exactly like Manage

Group option. You can create a new group or edit an already existing group and import the users from the master address book and create a new group by Type. For details take help of “Manage Group”.

Create New Group (Quick/Advanced)

This option helps you to create an additional group for some special reasons.

Choose any number of the users and add them to a specific group name in either of the categories the Create New Group (Quick or Advanced).

My Account

With “My Account” you can set your account default preferences, view your profile information and upload the account logo/signature or edit them as per requirement.

Account Preference

In Account Preference you can set all default information online for every service your reprographer offers. Select items from the options by specific service. Click on the “Save Changes” link. Note that you may set the default as many times as you want. You can specify every thing to the reprographer about the quantity of prints, size of print pages and the type of prints. All theses orders can be set by appropriate links.

My Profile

My Profile has the details on your personal information. You may add, edit or remove any information by Change Profile link and save it for future use.

Upload Account Logo

Uploading an account logo is generally preferred to personalize your account or standardize company’s status.
Select the Upload Account Logo
Browse to the location of your logo file then select your logo and then click “upload”.
You can edit it, remove or add a new logo as you like in future.

Order History

Order History describes the details on all information regarding job name, order no, service types, deadline, work schedules, the current status with the reprographer and other details. For more information theses links can be accessed “View Order Details”, “Re-Order”, “Re-Upload Files”, “Delete Orders”.

View Order Details

In this window you will have a detailed reporting on billing information, deadlines (due delivery date & time), items ordered, any special instructions and distribution process.

Re-Order

Re-Ordering is very much like Ordering for the first time. Clicking on the Re-Order you will be taken to placing the order in the same way as you placed for the first time.

Re-Upload Files

Once more re-uploading is similar to uploading process. When you require re-uploading some information. Choose the location where you want to upload the files to and then click on the “OK” button. Attach the files you have selected and click the upload button.

Delete Order(s)

Many pieces of information may go outdated and you would no longer need them for any use. You can delete such information from the Orders with the help of “Delete Order(s)”. Remember that deleting information from this link does remove the facts from Planholders’ List or Master Address Book.