Rutgers Pequod Online User Guide

http://ru.pequod.com

Contents

Getting Started

Logging In

The Rutgers Pequod site is reserved for use by faculty and staff of Rutgers University, and requires a Rutgers Central Authentication Service (CAS) account. When you first access http://ru.pequod.com, there will be a **Log In** link on the top right.

Clicking on the **Log In** link will take you to the CAS login page. Once you log in through CAS, find Pequod in the vendor directory. Click the link to Pequod from the vendor directory, and you will automatically be logged in to Pequod.

Selecting a Department

If this is your first time accessing Pequod, you will need to select a **Department** before using the rest of the site. Click on the **Account** tab, or go to https://ru.pequod.com/account.

Once you have selected your **Department**, click **Save**. Note that *you will not be able to change your department* once you have selected and saved it to your Account Profile. If you need to change your department, please contact Pequod directly.

Account Profile

Your account profile contains information about your account, some of which are carried over from your RIAS profile. RIAS information cannot be changed.

Address Book

The address book allows you to manage shipping addresses. To add a new entry to the address book, click the **Add New Entry** link.

Available Products

Clicking on the Home tab will display a list of available products on the left. Click a product to show product options and an Instant Price Estimate form for that particular product.

Instant Price Estimate

You can get an instant price estimate for your document by filling out **the Instant Price Estimate** form on the right. Note that each form contains options specific to the selected product type, and pricing for similar options on different products may not be the same.

Dashboard

The Dashboard tab is where you upload and manage files as well as create and manage documents.

Files are uploaded from your computer onto the site and are used to build documents. Only PDF files are allowed at this time. If you need help converting files of other types to PDF, contact Pequod and we will be happy to assist you.

Documents are completed works ready to be ordered. Each document consists of one or more files and include optional information such as paper stock, color or bw, binding, cover, hole punch, laminating, etc.

File Manager

Before creating a document, you must first upload the files you wish to use in the document. The **My Files** tab contains all your uploaded files and allows you to perform several actions described below.
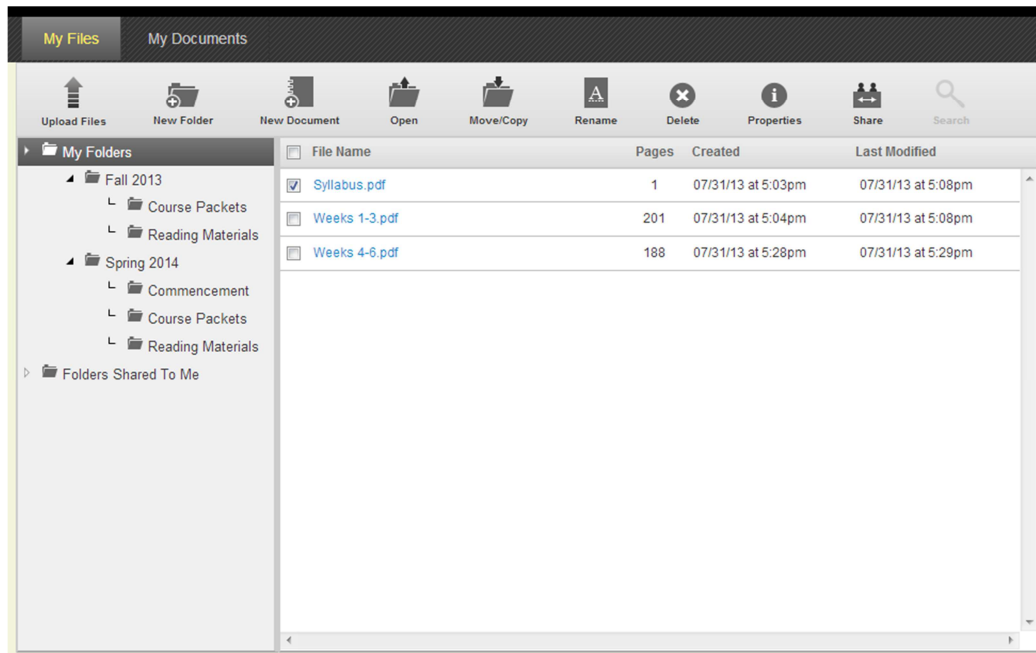
Uploading and Managing Files

- To upload files, click the **Upload Files** button in the top button bar. You can select multiple file to upload at once.
- Folders can be created by clicking the **New Folder** button. This allows you to organize your files.
- Files can be moved to different folders by selecting the checkbox to the left of a file and clicking the **Move/Copy** button. Note that files can only be moved, not copied.
- Files can be renamed by clicking the **Rename** button.
- Files can be deleted by selecting the checkbox to the left of a file and clicking the **Delete** button.
- Additional information about a file can be viewed by clicking the **Properties** button.

Documents Manager

The **My Documents** tab allows you to manage and create documents.
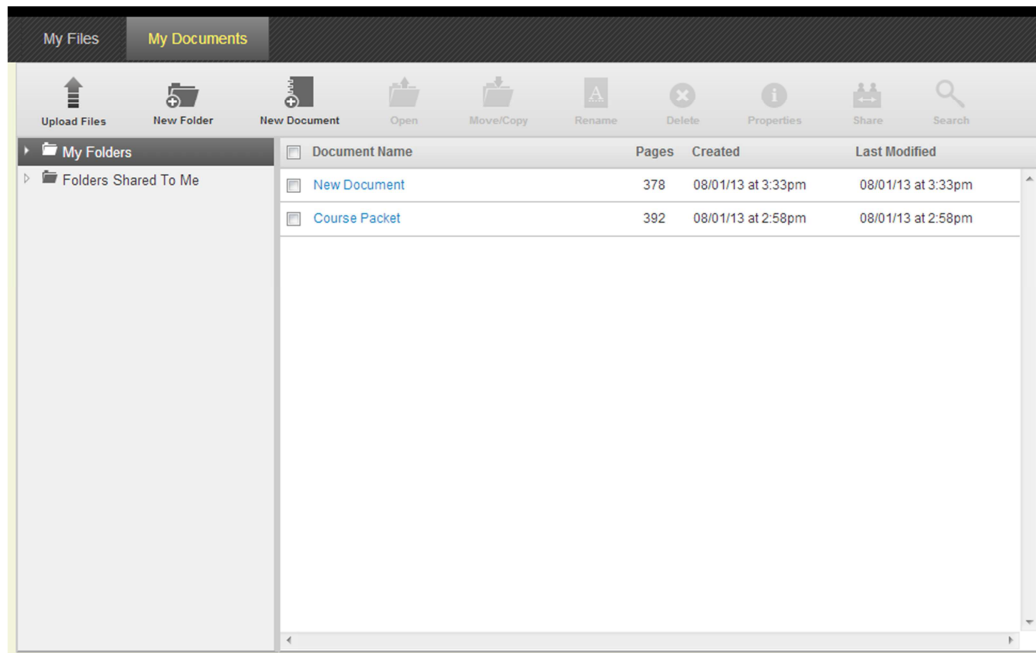
Managing Documents

- Folders can be created by clicking the **New Folder** button. This allows you to organize your documents.
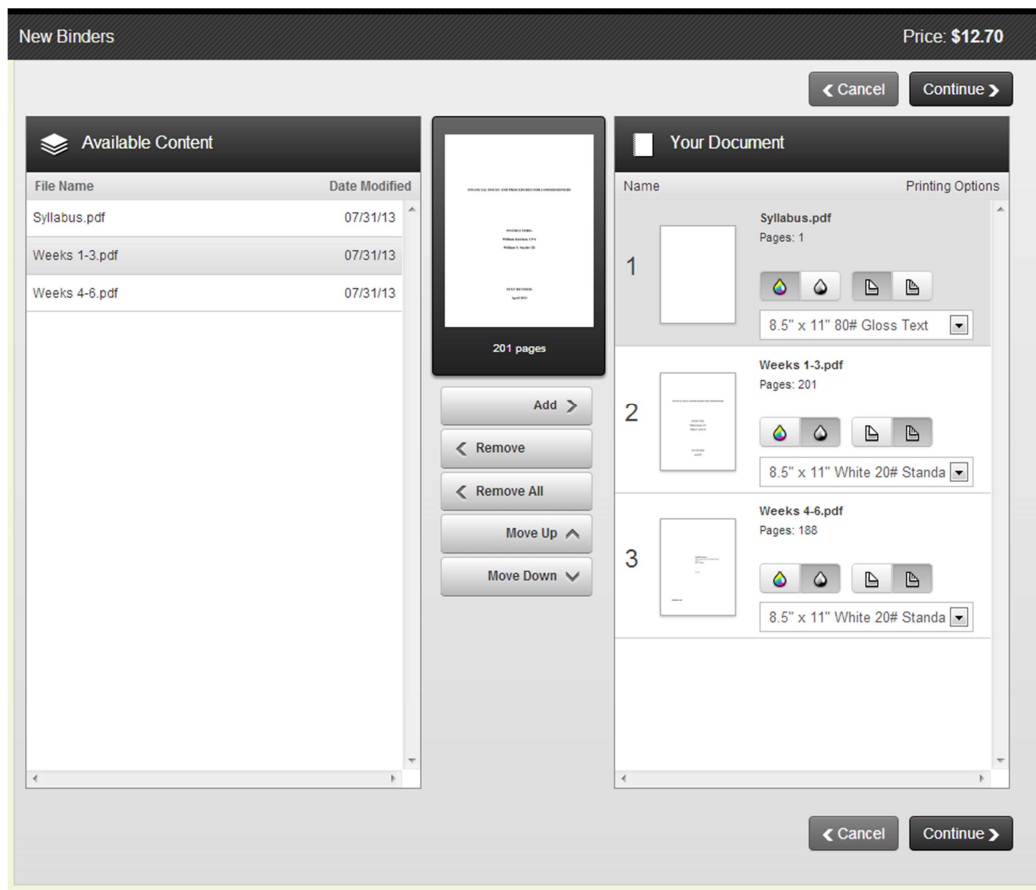- Documents can be moved to different folders by selecting the checkbox to the left of a file and clicking the **Move/Copy** button. Unlike files, documents can be copied to other folders.
- Documents can be renamed by clicking the **Rename** button.
- Documents can be deleted by selecting the checkbox to the left of a file and clicking the **Delete** button.
- Additional information about a file can be viewed by clicking the **Properties** button.

Creating a New Document

To create a new document, click the **New Document** button. This will bring up a menu allowing you to select the type of document to create.

Adding Files to a Document

Once you select a document type to create, you will be taken to a screen allowing you to select the files to be used in the document.

New Binders Price: **$12.70**

‹ Cancel   Continue ›

Available Content

File Name	Date Modified
Syllabus.pdf	07/31/13
Weeks 1-3.pdf	07/31/13
Weeks 4-6.pdf	07/31/13

201 pages

Add ›
‹ Remove
‹ Remove All
Move Up ∧
Move Down ∨

Your Document

Name   Printing Options

1 Syllabus.pdf
   Pages: 1
   8.5" x 11" 80# Gloss Text

2 Weeks 1-3.pdf
   Pages: 201
   8.5" x 11" White 20# Standa

3 Weeks 4-6.pdf
   Pages: 188
   8.5" x 11" White 20# Standa

‹ Cancel   Continue ›

The available files are displayed on the left, and the files currently in the document are displayed on the right. The price on the top right is updated in real time as you configure your document.

- To add a file to the document, select the file from the left and click the **Add** button.
- To remove a file from the document, select the file from the right and click the **Remove** button.
- Files can be arranged in a document by selecting the appropriate file on the right and clicking the **Move Up** or **Move Down** buttons.
- Each file included in the document on the right can be configured with the following options:
  - Color can be selected by clicking the ⬤ button.
  - Black and White can be selected by clicking the ⬤ button.
  - Single sided printing can be selected by clicking the ▱ button.
  - Double sided printing can be selected by clicking the ▱ button.
  - Paper type can be selected from the dropdown menu.
- Once you have added and configured all the necessary files in the document, click **Continue**.

Configuring Document Options

The next step is to configure options for the document and preview the document before adding it to the cart. There are two Preview modes available: **Grid View** and **Page View**.

Grid View

This mode displays each page as a small thumbnail in an 8x8 grid. If the document is larger than 64 pages, there will be an index on the bottom right for navigating multiple pages in Grid View. Click a thumbnail to view a larger preview image.
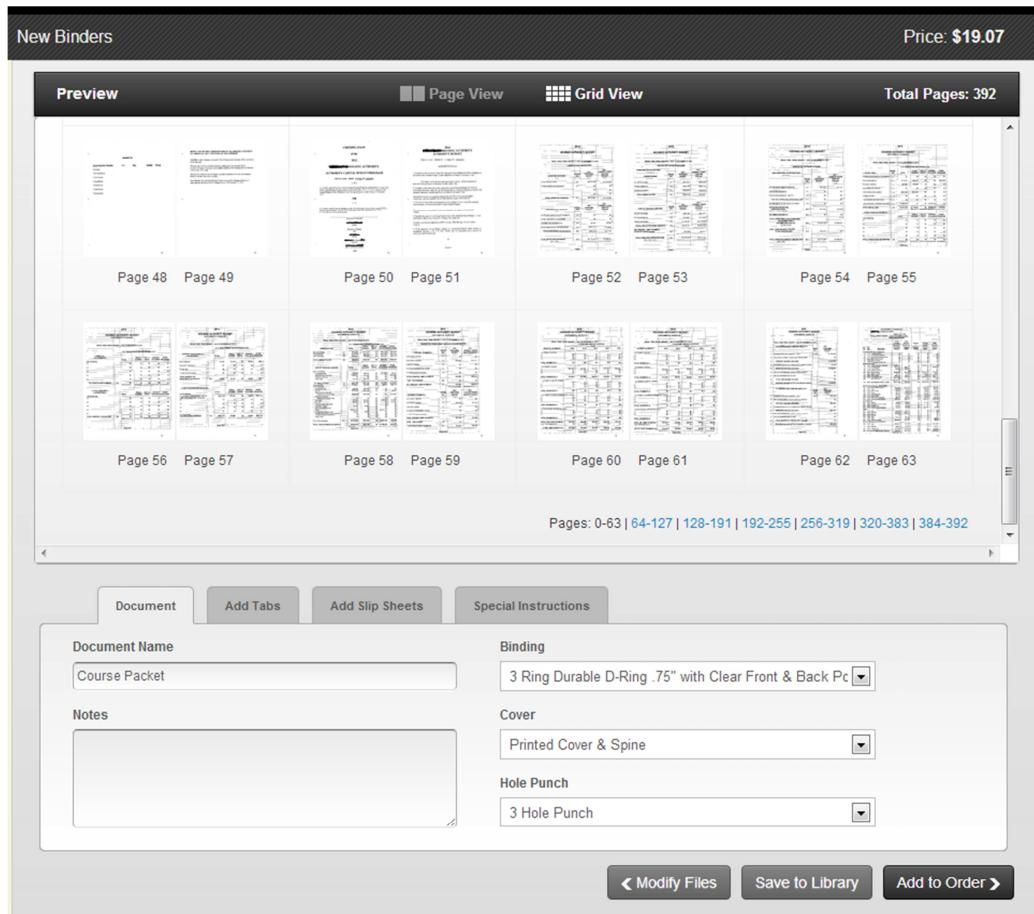
Page View

This mode displays the document two pages at a time and allows you to flip through the document a page at a time. Since Page View loads large sized images of every page in the document, it is highly recommended to only use Page View for small documents, e.g. less than 100 pages. On larger documents, Page View may cause your computer to slow down and possibly freeze due to the large number of images being loaded.
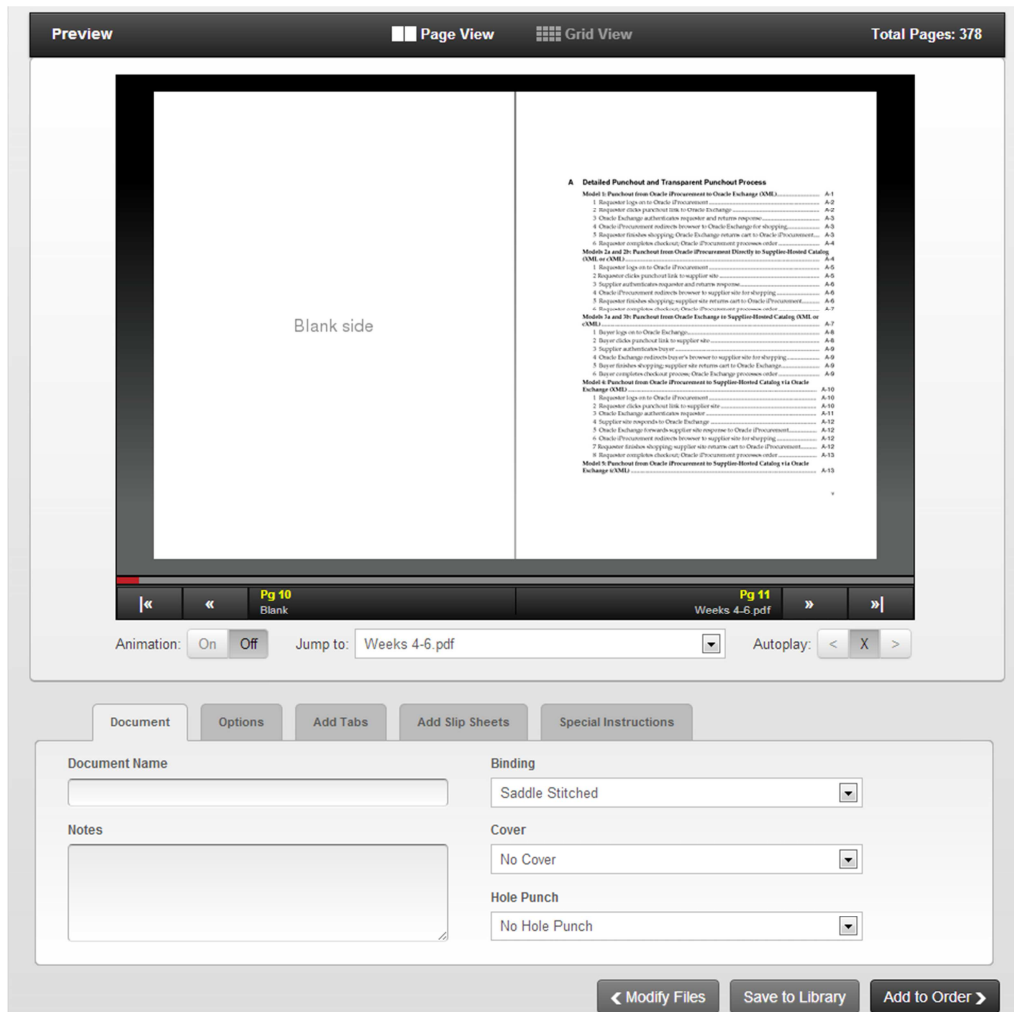
Document Options

Options can be configured for the document in the bottom panel.

- **Document** tab contains basic options for the document. The **Document Name** field will be used to identify your document in the Document Library and all current and future orders.
- **Options** tab contains additional options specific to the type of document being created.
- **Add Tabs** and **Add Slip Sheets** allow for tabs and slip sheets to be added to the document. Please refer to the following section for further instructions.
- **Special Instructions** allows you to add additional information to the document that do not fit elsewhere.

Adding Tabs and Slip Sheets

Tabs and Slip Sheets are added in a similar manner. On the configuration page, click the Add Tabs or Add Slip Sheets tab to display the following.

1. Select the type of Tab or Slip Sheet to be added in the **Type** dropdown.
2. Select the **Location** for the Tab or Slip Sheet. Note that Tabs and Slip Sheets must be inserted before an *ODD* numbered page.
3. Enter the **Text** to be printed on the Tab or Slip Sheet.
4. Click the **Add** button. This will add a row to the list of Tabs or Slip Sheets on the right.
5. Previously added Tabs or Slip Sheets can be **Deleted** by clicking the ✖ icon next to the desired row on the right.

Adding Documents to the Cart

Once you have configured your desired document options, click the **Add to Order** button. This will add the document to your Cart.

- Modify the document by clicking the **Edit** button to the left of the item in the cart.
- Remove the document from the cart by clicking the **Remove** link.
- Change the quantity of each document to be ordered by entering a number into the **Quantity** field.

Click the **Continue** button to proceed to the next step.

Selecting the Shipping Address

If you have already configured shipping addresses on your account, they will be listed here. Otherwise, you can enter a new shipping address here. Managing shipping addresses is discussed further on in this document.

Once you have selected or entered a shipping address, click **Continue** to proceed to the next step.

Placing an Order

The final order screen allows you to select Shipping options and preview the order before submitting it.

- **Turnaround and Shipping** options are configured on the top left. The price on the right is updated according to the selected option. Note that both *document prices* and *shipping prices* are affected.

- If your department manager has configured Carrier Numbers for your account, they will appear in the **Carrier Number** box and can be selected for the order.
- **Promotional Codes** can be entered on this page and will be applied to the order immediately.

When you are ready, click the **Submit Order for Approval** button.

Order Approval Process

When you first submit an order, it is sent to Pequod for approval. This allows Pequod to review each document in the order. Once an order is approved, you will be notified by email to return to the site to submit the order to RIAS. Once the order is submitted to RIAS, Pequod will proceed to fulfill the order.

Submit Order for Approval

After submitting an order for approval, the order will be saved to your Order History with the status **Awaiting Approval**.

Submit Order to RIAS

Once an order has been approved by Pequod, you will be notified by email and the order status will be updated to **Approved**. The Order page will now have a link to submit the order to RIAS.

After submitting your order to RIAS, you can then checkout according to standard RIAS procedure. Once that is completed, all that is left is to wait for the order to be delivered.

Order History

The order history contains all past and current orders. Here you can monitor the status of current orders. Click on a row to view details of that order. If an order has been **Approved**, click the order to review it and submit it to RIAS.

Department Managers

There are additional features available only to department managers. Contact Pequod if you are a department manager and need these features enabled for your account.

Department User Folders in My Files and My Documents

When viewing **My Files** and **My Documents** in the Dashboard, you will see additional folders for each member of your department under the **Department Users** folder.
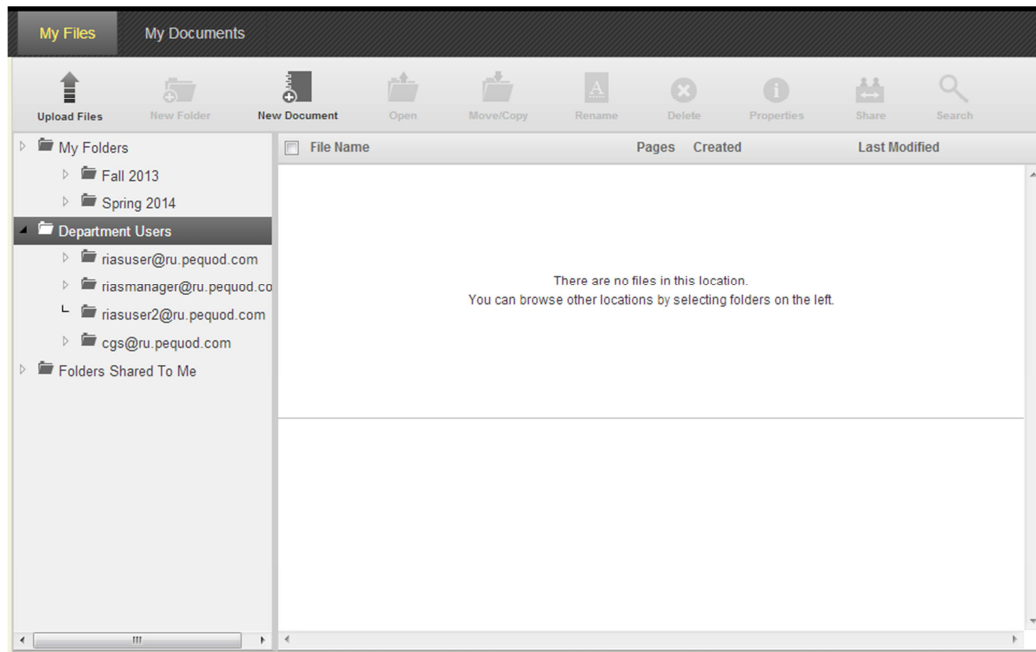

You can perform the following with the Department Users folders:

- View Files in Department User folders
- View Documents in Department User folders
- Move Files from your folders to Department User folders
- Move and Copy documents from your folders to Department User folders

Carrier Numbers

Department managers can define Carrier Numbers to be used by members of their department. To do so, click on the **Carrier Numbers** tab in the Account page.
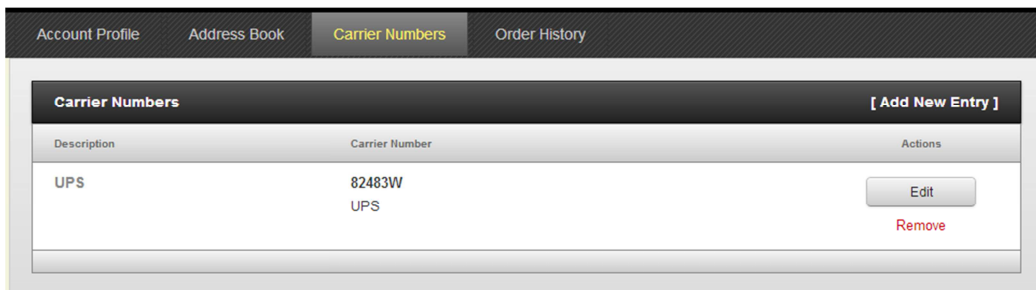
Carrier numbers defined here will be available to department users when they create and submit an order.

Extras

Custom Quote

If you need a custom document made that does not fit the product types listed, you can submit a request for a custom quote. Click the **Custom Quote** product option on the Home page.
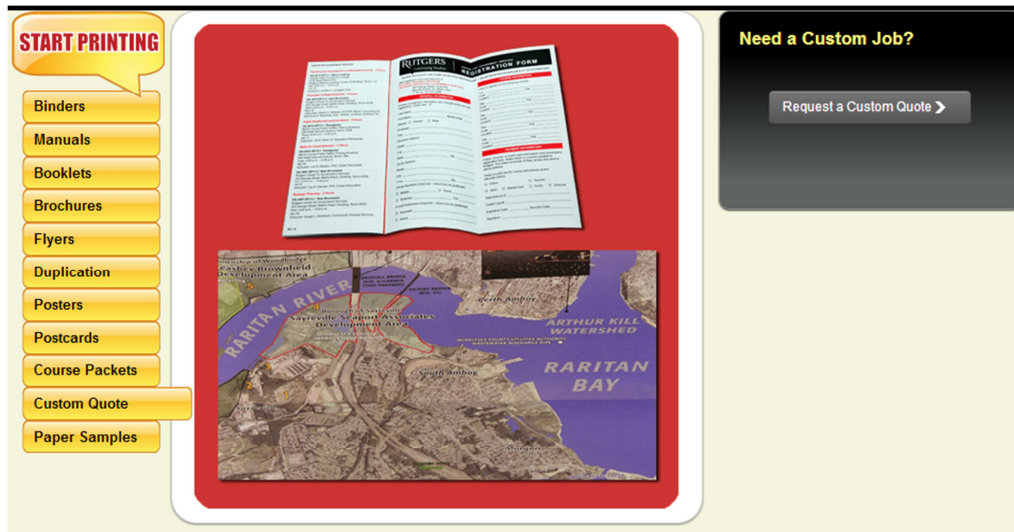
Then click the **Request a Custom Quote** button on the right.

Fill out the **New Custom Quote** form and submit it. We will respond to you shortly.

Paper Samples

We offer free paper samples so you can physically review paper options before placing an order. To request paper samples, click the **Paper Samples** product option on the Home page.
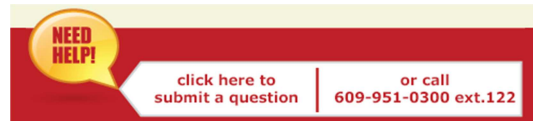

Then click the **Request Paper Samples** button on the right.

Fill out the form and we will mail samples to you as soon as we confirm your information.

Help

If you need help at any time, click the Help button on the top right.

This will bring up a contact form. Fill out and submit the form, and Pequod will respond to you immediately. You may also call Pequod directly via the phone number listed on the contact form.