

# CMS Client Config Print User Guide AstraZeneca UK

Version 2 (28/03/2017)

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## **Client Portal Login**



Using the URL provided...the 'Client Portal' login screen will be displayed.

Enter the 'Login Credentials' supplied and click 'Sign in' to enter the platform.

## **Client Portal**



The **Client Homepage** allows access to any of these areas within the platform.

- 1) Smart Orders,
- 2) Config Print and
- 2) Smart Meetings

NB: This guide will cover the 'Config Print' (Business Cards) order process.

Click on 'Config Print' to start the 'Business Card' ordering process.



## **Client Portal**



On the left hand margin, select '**Common Items**', as highlighted, to show all configurable print items, click the required item, e.g. '**Business Cards**' to start the '**Configurable Print**' order process.

NB: For 'Non Standard' ordering or 'Smart Meetings', please refer to the relevant 'User Guides'.

#### **Configure Product Request**



After selecting the required item, click the 'Order' button to initiate the details of the order request.

**NB:** If more than one type of the selected item is available, check the item description carefully before continuing.



## **Product Item Specification**

xerox		AstraZeneca
Home My Account Cart		Drafts Help Sign
Search Q	Hello Stephen	
Name*	Stephen Rea	Refresh Preview
Select Location*	AZ UKMC HQ	AstraZeneca
Job Title	IT Technical Trainer	
Qualifications - Optional	BSc	John Bibl Biomed Lab Sc Sir Manager Ant Nomenia
Direct Tel	+44 (0) 1132 725533	D +000000000000000000000000000000000000
Mobile	+44 (0) 7739 820008	
Email Address*	stephen.rea@xerox.com	

This screen confirms the 'Business Card' content. Enter the required 'Name', 'Location', 'Job Title' etc. and all mandatory fields that are shown with a 'Red Asterix \*'.

Scroll down to continue entering all information required on the 'Business Cards'.

NB: 'Name' etc. and other 'User Details' are populated automatically using details saved within 'Personal Information', as detailed on P.12.

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* Indicates a required field		-		
Is Single Sided Card				
Reverse Images*				
Signatory if you are unsure about the s	suitability of an image.			
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## **Product Item Specification**

After scrolling down, select whether the '**Business Cards**' are to be '**Single Sided**', or choose the preferred reverse image by selecting, as highlighted above.

**NB:** Only one image per order can be selected.

Scroll down to continue and to view a 'PDF Proof' of the finished card, if required.



## **Product Item Specification**

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After scrolling down, in order to view a 'PDF Proof', click the 'Click here for proof' button.

## **Product Item Specification (PDF Proof)**



Above shows an example of the front '**PDF Proof**' view.

Scroll down to see the rear view of the 'Business Cards', or click the red cross to close.



## **Product Item Specification (PDF Proof)**



Above shows an example of the rear 'PDF Proof' view.

Scroll up to see the front view of the 'Business Cards', or click the red cross to close.

## Product Item Specification



Once happy with the content of the 'Business Card(s)' and the 'PDF Proof', tick the box 'Proof is Approved' and click 'Next' to continue.

NB: Clicking 'Back' allows the user to edit any previous content selections.



## **Shopping Cart – Summary**

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Search Q	Hello Stephen	
Shopping cart items - to check out now		
	Name	Units
Assistent Contraction	Business Cards/UBC0001 Edit	1 = 1 box of 100 cards £ 8.5
		Subtotat: £8.53
Clear shopping cart		Update

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This request summary is just before '**Checkout**' and there is an opportunity to revise the information by clicking the '**Edit**' link and amending as required.

Select the number of '**Units**'/'**Boxes**' (100 per box) by clicking the dropdown, clicking '**Update**' will update any prices after changing quantities.

## Shopping Cart - Summary (Lay Away)

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Home	My Account	Cart				Drafts Help	Sign out
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Shopping ca	art items - to che	eck out now	Name		Units		Price
<b>9</b> 8	53 50 7 2	Assaltreed	Business Cards Edit	JUBC0001	1 = 1 box of 100 cards		£ 8.53 GBP

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The request can be saved for later by clicking on the '**Shopping Cart**' icon. This will move the request to a '**Draft**' status in the '**Shopping Cart**'. Alternatively, if it is no longer required, then click on the '**Trash Can**' icon to delete the request.

When ready to proceed after checking 'Details' and 'Quantity', click 'Submit' to continue.



## **Delivery Address Identification**

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Home My Account Cart			Help Sign out	
Search Q	Hello Stephen			
Project Name	Business Cards			
Cost Centre*	5555			
Department*	IT Derpartment			
Delivery Information				
Required Date*	15/02/2017			
Delivery Address*	○ AZ Site			
Receipient*	Stephen Rea			
Email Address*	stephen.rea@xerox.com			
Phone*	+44 (4) 4011 327255			

The 'Project Details' are now displayed together with 'Required Date' and 'Recipient' information.

**NB:** Deliveries can be sent to any '**AZ Site**', by using an address dropdown, or to any '**Other Addresses**' via completion of the free type address boxes.

Select accordingly and check all details before scrolling down to confirm the 'Delivery Address'.

## **Delivery Address Identification (AZ Site)**

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		^
Delivery Information		
Required Date*	15/02/2017	
Delivery Address*	● AZ Site O Other Address	
Receipient*	Stephen Rea	
Email Address*	stephen.rea@xerox.com	
Phone*	+44 (4) 4011 327255	
AZ Site (UK)*	AZ UK MC	
Building	Building 12	
Additional Order Information	Replenishment	
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If sending to an 'AZ Site', use the highlighted dropdown to select the appropriate 'Site Address' and click 'Next' to continue, after entering any 'Additional Order Information', if required.

NB: Clicking 'Back' will allow editing of any previous choices.



### **Delivery Address Identification (Other Address)**

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Delivery Address*	○ AZ Site <ul> <li>Other Address</li> </ul>	^
	4	
Receipient*	Stephen Rea	
Email Address*	stanban rag@varav.com	
	stephen.rea@xerox.com	
Phone*	+44 (0) 1132 725534	
Addross Line 1*		ר – ר
Address Line 1	One City West	
Address Line 2	Gelderd Road	
Zip Code	LS12 6NJ	
City		
	Leeds	
Additional Order Information	Replenishment	
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If sending to 'Other Addresses', use the highlighted 'Address Fields' to input the appropriate 'Address' details and click 'Next' to continue, after entering any 'Additional Order Information', if required.

NB: Clicking 'Back' will allow editing of any previous choices.

**Checkout Request Summary** 

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The request summary is now displayed; details of the order can be reviewed and edited, if required, by scrolling down the screen and clicking on the '**Back**' button.

After checking all order details, scroll down the screen and select '**Checkout**' to submit the order request.



## Checkout Request Summary continued...

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Receipient:	Stephen Rea	^
Email Address:	stephen.rea@xerox.com	
Phone:	++44 (0) 1132 725534	
AZ Site (UK):	AZ UK MC	
Building:	12	
Additional Order Information:	Replenishment	
Product Name:	Business Cards	
Quantity (Box(es) of 100):	1	
Price:	£ 8.53 GBP	
Total Price:	£ 8.53 GBP	
Back		Submit Order
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The request summary is now displayed; details of the order can be reviewed and edited, if required, by scrolling down the screen and clicking on the '**Back**' button.

After checking all order details, scroll down the screen and select '**Checkout**' to submit the order request.

#### **Request Summary**

	xerox 🔊°	xerox ()°					
Home	My Account Cart		Drafts	Help	Sign out		
Search	٩	Hello Stephen					
An email Order nu	I notification has been sent to y umbe: 883431	ou with information regarding your order					

The order has now been submitted and a confirmation '**Request Number**' is displayed.

If there is a requirement to add a new request, then click 'Continue Shopping'.

**N**B: Clicking the '**PDF Download**' button allows a PDF of the acknowledgment to be downloaded, if required. Clicking the '**Print Order Details**' button allows users to print confirmed order details.



## **Request Confirmation**

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Fri 10.02/2017 11:24 admin@az.xerox.com ***Demo**Dev AZ UK MC Staging New Order auto Approved; #883431																
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Item #	Proc	duct		Project Name	Cost Cen	ter Job Name	Quantity	Total Price								
37863	Busi	iness Card	5	Business Cards	5555	Stephen Rea	1 item	£8.53								
Delivery	details															
Delivery details Stephen Rea AZ UK MC, Building 12 Zip: Phone: +44 (4) 4011 327255																
Date Rec	uired		15-02-201	7												
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Upon submission of an order, an automated email confirmation will be sent summarizing the request details.

NB: 'Business Card' orders are approved automatically.

#### **Request Status**



To '**View**' an order status of any previously placed orders, click on the '**My Account**' tab, as highlighted above at the top of the screen.

NB: This will allow access to the individual user's 'Order History'.



## **Request Status**

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Kerce Carl	Kerce   Home My Account Cart Cart Cart Drats Help Sign out Search Q Hello Stephen This page allows you to view your order history and edit your personal information. Search Presonal information Review your parsonal details.	Cart       Drats       Help       Sign out         More       My Account       Cart       Drats       Help       Sign out         Search       Q       Hello Stephen       Help       Help       Help         This page allows you to view your order history and edit your personal information.       Help       Help       Help         March       March       March       Help       Help       Help         March	ggested Sites 🔻 🛴 IT Support @ Xerox Home 🛞 Time Sheets 😮 Training ES 🕲 Training PT 🕲 Training PL 🕲 Training IT 🕲 Training UK 🕲 Train	ning FR 💿 Training DE 📳 Aprimo Mobile 🎒 Web Slice Gallery
Home     My Account     Cart     Drafts     Help     Sign out       Search     Q     Helio Stephen	Home     My Account     Carl     Drafts     Help     Sign out       Search     Q     Hello Stephen	Home     My Account     Cart     Drafts     Help     Sign out       Search     Q     Helio Stephen	xerox 🔊	AstraZeneca
Search       Q       Hello Stephen         This page allows you to view your order history and edit your personal information.       Order History         Review your past or pending orders.       Personal information         Update your personal details.       Update your personal details.	Search       Q       Hello Stephen         This page allows you to view your order history and edit your personal information.         Order History         Review your past or pending orders.         Personal information         Update your personal details.	Search       Q       Hello Stephen         This page allows you to view your order history and edit your personal information.         Order History         Review your past or pending orders.         Personal information         Update your personal details.	Home My Account Cart	Drafts Help Sign out
This page allows you to view your order history and edit your personal information. Order History Review your past or pending orders. Personal information Update your personal details.	This page allows you to view your order history and edit your personal information.  Order History Review your past or pending orders.  Personal information Update your personal details.	This page allows you to view your order history and edit your personal information. Order History Review your past or pending orders. Personal information Update your personal details.	Search Q Helio Stephen	
Order History Review your past or pending orders. Personal information Update your personal details.	Order History Review your past or pending orders. Personal information Update your personal details.	Order History Review your past or pending orders. Personal information Update your personal details.	This page allows you to view your order history and edit your personal information.	
Personal information Update your personal details.	Personal information Update your personal details.	Personal information Update your personal details.	Order History Review your past or pending orders.	
			Personal information Update your personal details.	

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Click on the 'Order History' link to display a list of 'Historic Jobs'.

## **Request Status**

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Home My.	Account Cart			Drafts Help Sign out
Search	٩	Hello Stephen		
Order ID:		ø		
Order List				Clear search results
Order#	Order date	Total amount	Status	
883431	)/02/2017	£ 8.53 GBP	Order in Pre-Production	Show receipt
773331	10/02/2017	£ 10.78 GBP	Order in Pre-Production	Show receipt
333331	27/01/2017	£ 10.78 GBP	Order in Pre-Production	Show receipt
723331	26/01/2017	£ 10.78 GBP	Order in Pre-Production	Show receipt
782331	26/01/2017	£ 10.78 GBP	Order in Pre-Production	Show receipt
881331	25/01/2017	£ 8.53 GBP	Order in Pre-Production	Show receipt
671331	25/01/2017	£ 8.53 GBP	Order in Pre-Production	Show receipt

Recent orders will be displayed together with their '**Order Status**'. There is also an option to search for any placed '**Order ID's**' using the highlighted search box above.

Click back on the '**My Account**' button to be returned back to the previous screen or 'Home' to be sent back to the '**Homepage**'.



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## **Personal Information**

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Search Q	Hello Stephen				
This page allows you to view your order	history and edit your personal inform	ation.			
Order History Review your past or pending orders.					
Personal information Update your personal details.					

Within the '**My Account**' screen/area, clicking the '**Personal Information**' link allows users to edit their own details and any defaults that are used when placing orders.

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## **Personal Information**

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Email Address *	stephen.rea@xerox.com			
First Name *	Stephen			
Last Name	Rea			
Select Location	AZ UK MC Field Based			
Phone Number	+44 (0) 7739 820009			
Mobile Number(only AZ No.)	+44 (0) 7739 820009			
Fax Number				

Edit any incorrect '**Personal Details**' within '**Personal Information**', as highlighted above, scroll down after making changes and click '**Save**' to update.

NB: Click on the 'Home' button at any time to be returned back to the homepage.



### **Home Page**



Click on the 'Sign Out' button, as highlighted above, at the top of the screen to log out of the platform at any time.

#### **Signing Out**



NB: Please refer to the 'Non Standard' user guide for guidance on ordering any 'Ad Hoc' items.
NB: Please refer to the 'Smart Meetings' user guides for guidance on setting up a meeting.
NB: Please refer to the 'Smart Orders' user guide for guidance on ordering any 'Smart Order' items.
Click here to return to the 'Contents Page'.



#### **AZ Config Print FAQ's**

#### 1. What items are available?

Currently business cards are the first items available to AZ UKMC staff, however this may be expended to other common items as required.

#### 2. What is the lead time for business cards?

The service level is 5 working days from submission of order.

#### 3. How many can I order?

The system allows a minimum of one box of 100, in 100 steps to a maximum of 5 boxes of 100.

#### 4. What is the specification?

The specification conforms to AZ Brand guidelines and is sized 55 X 85mm, printed on 300gsm Colotech card

#### 5. Can I have a printed reverse image?

Yes, you can select an image from a range as part of the configuration process, but please note the guidelines relating to specific images relating to certain business units.

#### 6. Can I add my qualifications?

Yes, the system contains a drop down of frequently used qualification options.

#### 7. What if I my qualification is not listed?

Contact AZUKMCService@xerox.com and we will look to add your qualifications to the system.

#### 8. Do I see a proof of the business card?

Yes. Part of the configuration process is to view a proof, and the user needs to click a button to signify proof approval prior to proceeding. If you notice an error, you can go back and correct, and re-proof.

#### 9. What if I notice an error after submission, can I change it?

Unfortunately, no. The process is automated and on submission sends the file direct to print.

Click here to return to the 'Contents Page'.