

CMS Client Smart Meetings User Guide & FAQ's AstraZeneca UK

Version 7 (24/04/2017)

Task

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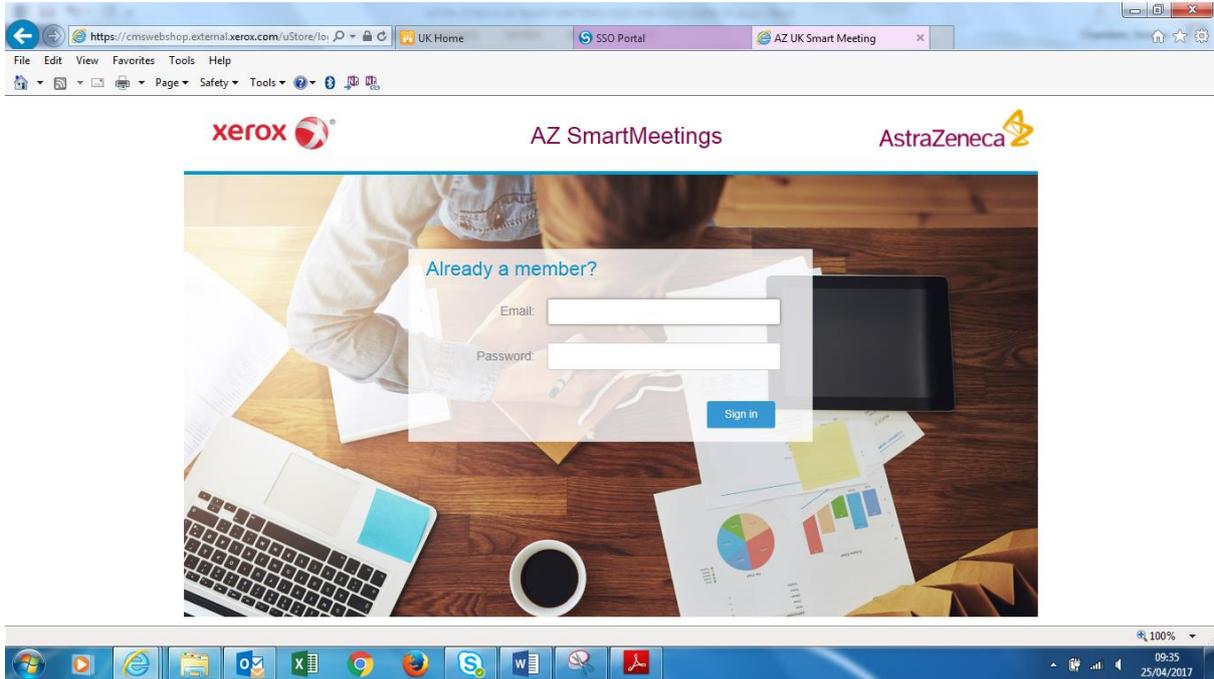
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Introduction

Smart Meeting is used for portable capability to set up meetings with health care professionals in the field. This will enable them to arrange meetings and add templates.

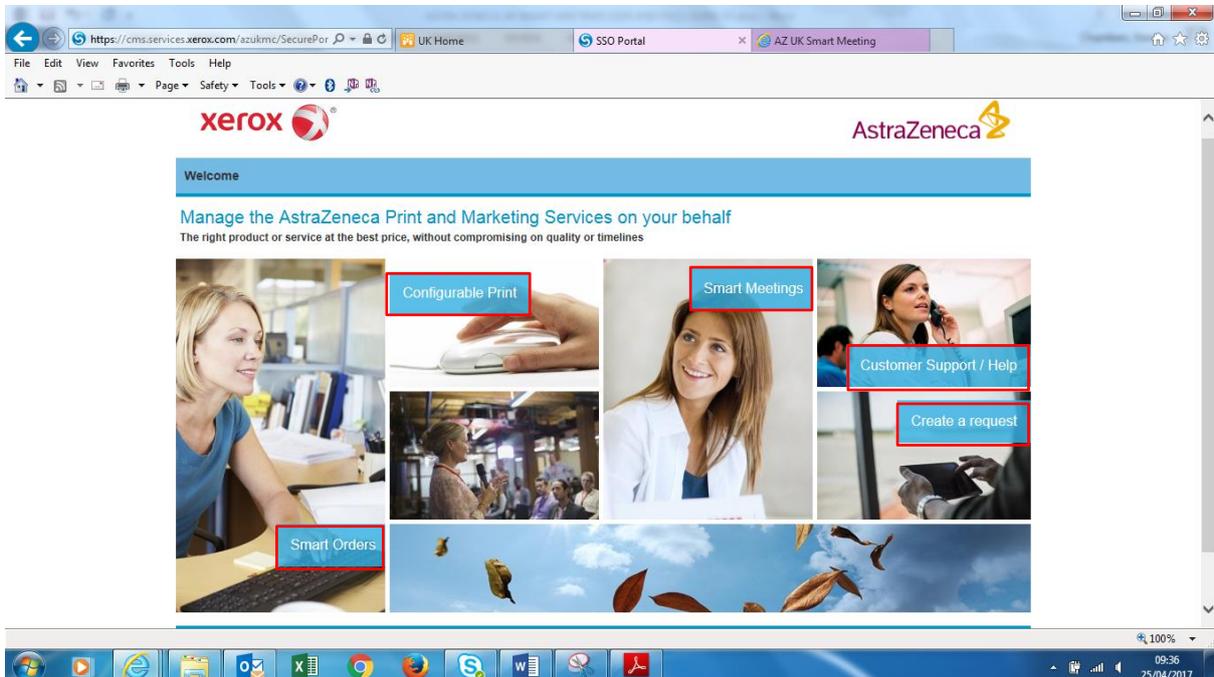
Client Portal Login



Using the following URL <https://cms.services.xerox.com/azukmc/> will provide access to the portal.

Enter your Login Credentials supplied and click 'Submit' to enter the platform.

Welcome Screen

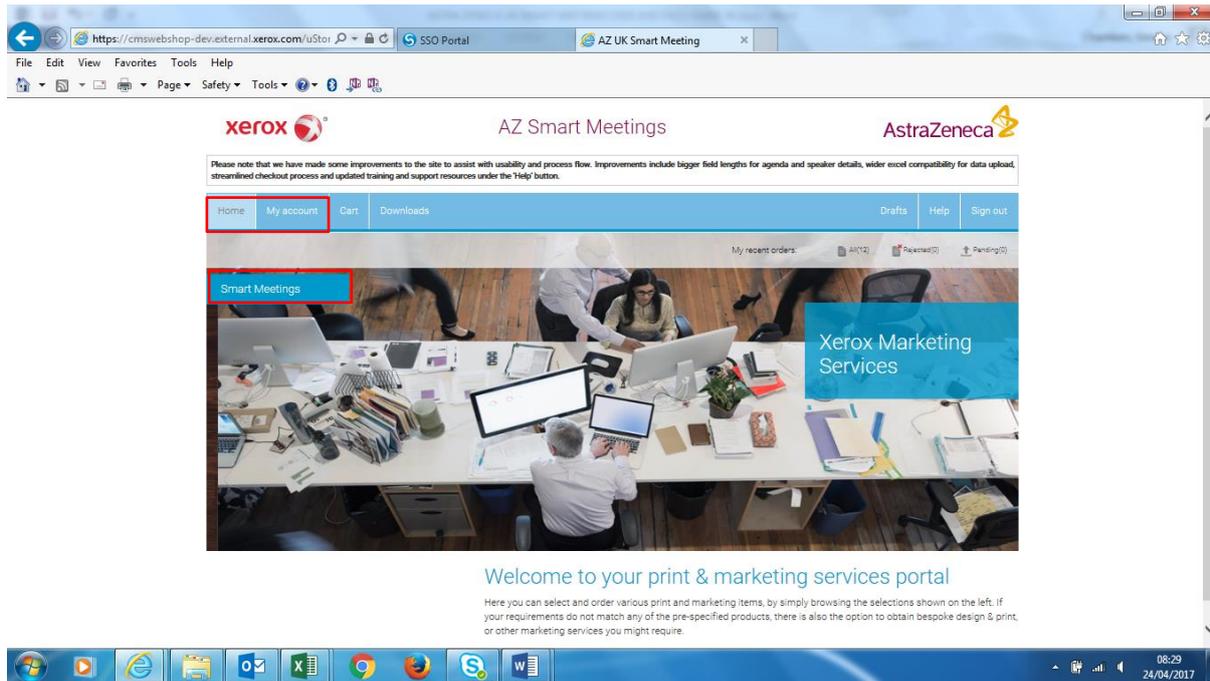


The 'Client Homepage' allows access to 'Smart Orders' > 'Configurable Print' > 'Smart Meetings' > 'Customer Support / Help' > 'Create a Request'.

Click on 'Smart Meetings' to start the Smart Meetings process.

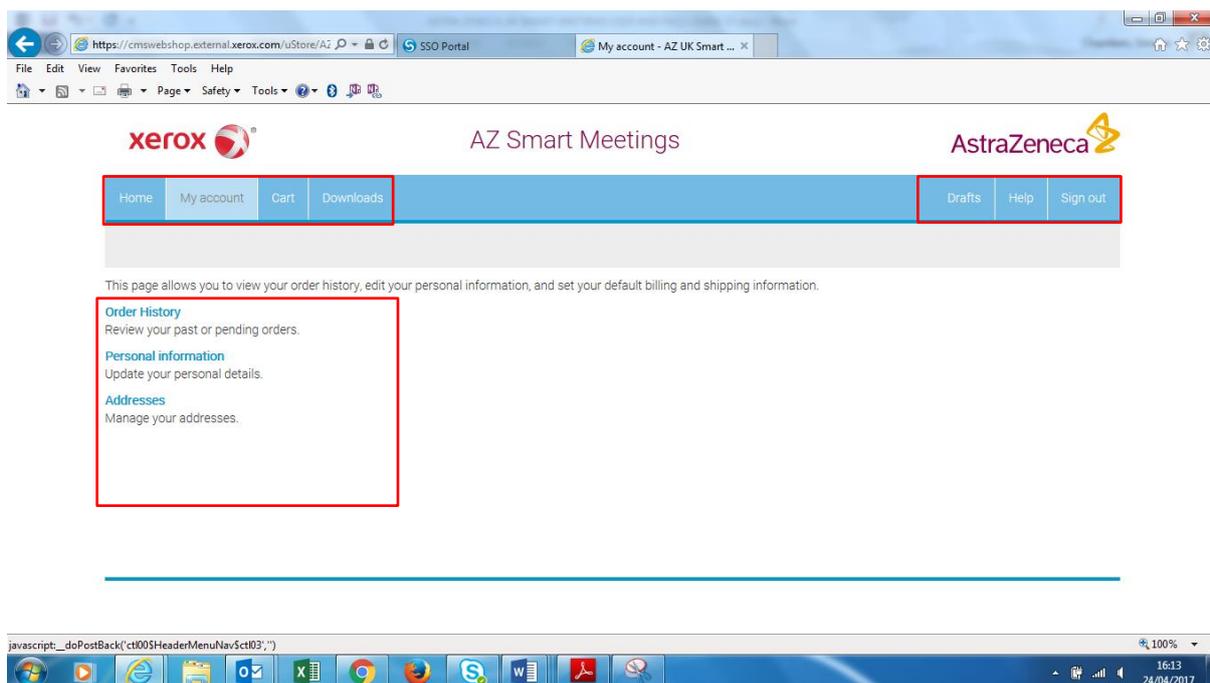
NB: This guide will cover the Smart Meetings process. For 'Non Standard' ordering or 'Smart Orders', please refer to the relevant 'User Guides'.

Client Portal



The Client Portal is loaded providing access to **'Smart Meetings'** indicated at the top left of the screen.

My Account



My Account provides access to the following options > **'Order history'** > **'Personal Information'** > **'Addresses'**.

'Cart' shows any saved orders that are stored in your shopping trolley. **'Downloads'** allows the user to download **editable templates** for agendas and certificates for local print. **'Drafts'** display any stored orders that have not yet been submitted. **'Help'** provides access to the User Guides and **'Sign out'** will sign you out of your session.

Order History

Order ID: 2401011 View: All orders

Order#	Order date	Meeting title	Total amount	Status	Show receipt	Show proof
3212011	24/04/2017	Training Update	£ 35.82 GBP	In progress	Show receipt	Show proof
1381011	24/04/2017	Nebuliser	£ 35.82 GBP	In progress	Show receipt	Show proof
2401011	24/04/2017	Nebuliser Overview	£ 39 GBP	In progress	Show receipt	Show proof

'Order History' provides information on orders previously placed. This can be filtered to show > 'All orders' > 'Rejected orders' > 'Orders in progress'.

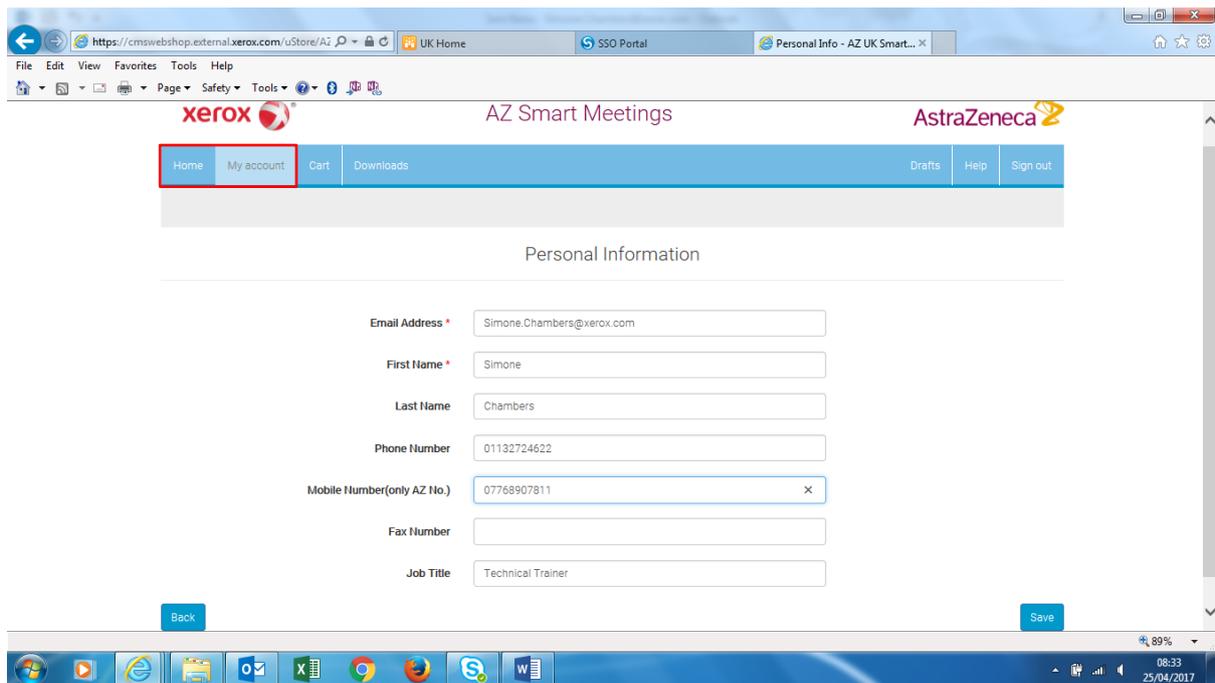
Searching Orders

Order ID: 1381011 View: All orders

Order#	Order date	Meeting title	Total amount	Status	Show receipt	Show proof
1381011	24/04/2017		£ 35.82 GBP	In progress	Show receipt	Show proof

Searches can also be carried out by entering the 'Order ID' and selecting the 'Search' option. The search results will be displayed showing the status of the order and providing links to the receipt and proof.

Personal Information



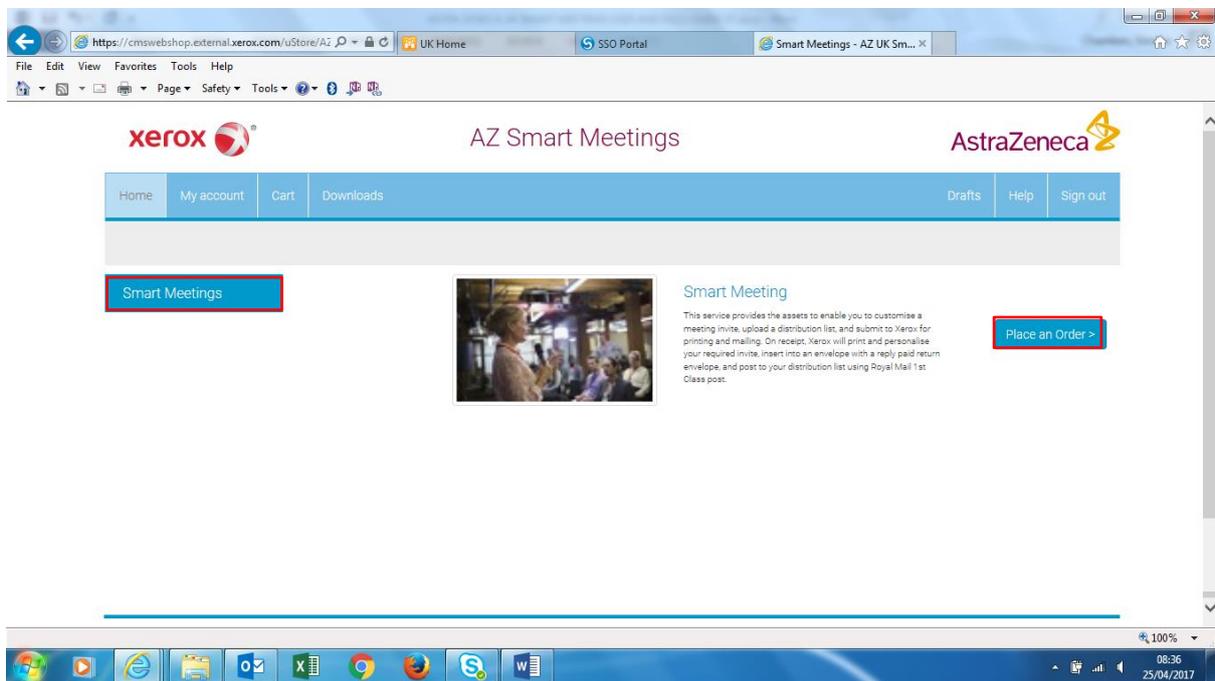
Email Address *
First Name *
Last Name
Phone Number
Mobile Number(only AZ No.)
Fax Number
Job Title

[Back](#) [Save](#)

Updating the personal information can be used to customise your profile adding your email address and contact details, which will then populate any orders or meetings created with your details.

'Personal Information' is accessed by selecting **'Smart Meeting' > 'My Account' > 'Personal Information'**. When details have been added select **'Save'** to confirm. Select **'Home'** to return to the Client Portal.

Place an Order



[Home](#) [My account](#) [Cart](#) [Downloads](#) [Drafts](#) [Help](#) [Sign out](#)

[Smart Meetings](#)

Smart Meeting
 This service provides the assets to enable you to customise a meeting invite, upload a distribution list, and submit to Xerox for printing and mailing. On receipt, Xerox will print and personalise your required invite, insert into an envelope with a reply paid return envelope, and post to your distribution list using Royal Mail 1st Class post.

[Place an Order >](#)

To arrange a meeting select **'Place an Order'**, this will begin the process of creating a meeting invite.

Meeting Contacts

The screenshot shows the 'Meeting Contacts' form in a web browser. The form is titled 'Meeting Contacts' and is divided into two columns: 'Contact1' and 'Contact2'. The 'Contact1' column has fields for Contact Name* (Simone Chambers), Phone Number* (01132724622), Email Address* (Simone.Chambers@xerox.com), and Job Title* (Technical Trainer). The 'Contact2' column has fields for Contact Name* (Mr Andrew Branning), Phone Number* (01132725532), and Job Title* (Consultant). Below these is the 'Meeting Details' section, which includes Meeting Title* (Nebuliser Overview), Meeting Date* (27/04/2017) with a calendar icon and a 'Clear' button, and Meeting Timing* (19:00). A red box highlights the form fields.

'Place an Order' leads onto the following 'Meeting Contacts' where details of the meeting can be added. 'Contact Name' will be populated with the details supplied in Personal Information. 'Contact 2' is if you have a secondary contact running the meeting.

The 'Meeting Date' and 'Meeting Timing' option can be selected using the calendar and time options at the right.

All mandatory fields are indicated by a red asterisk.

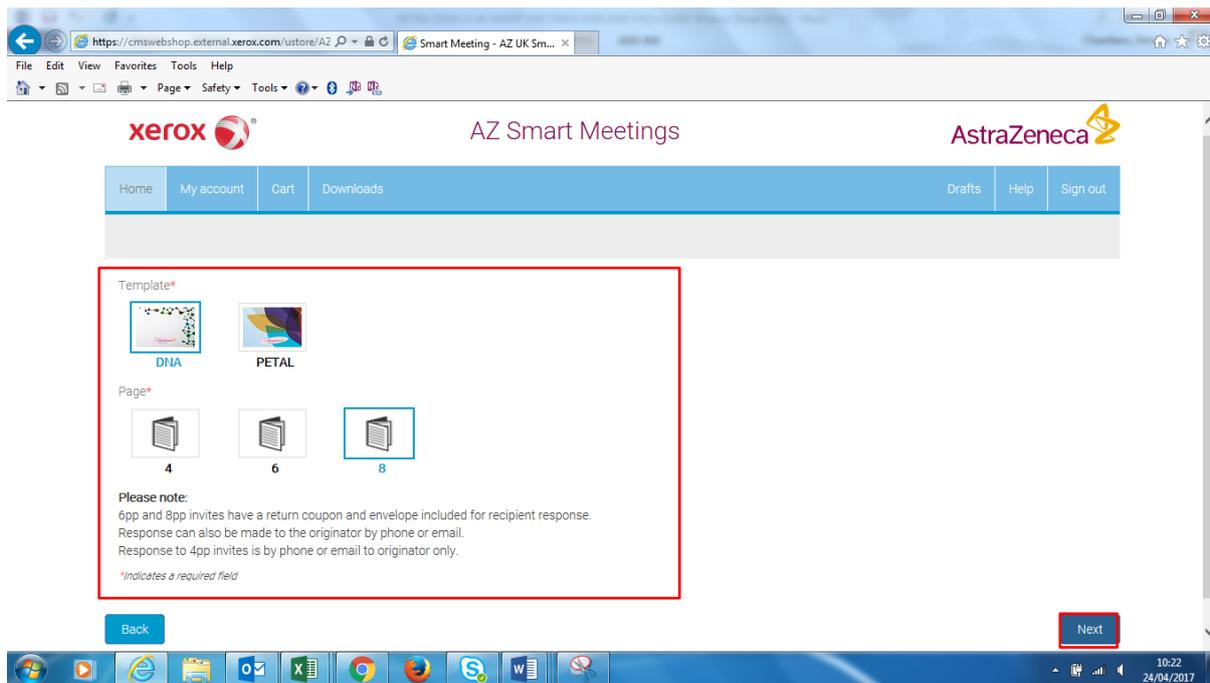
Meeting Venue

The screenshot shows the 'Meeting Venue' form in a web browser. The form is titled 'Meeting Venue' and includes fields for Meeting Venue* (Bath Spa University), Meeting Address1* (6 Somerset Place), Meeting Address2 (Bath), Meeting Address3, Meeting Country, Meeting Zip (BA1 5SF), Number of Places* (74), and Education Hours* (2). A tooltip points to the Meeting Venue field with the text: "Please note, Venue, Address etc will be auto populated based on the selected venue else custom key in all fields!". A red box highlights the form fields.

'Meeting Venue' has a selection of addresses available from pre-loaded data. The Venue can be selected from those available, or alternatively a new Venue may be added by adding the details in the supplied fields and this will be retained for future meetings.

'Number of Places' refers to the number of attendees expected at the meeting, the minimum for the data is 25. 'Education Hours' refers to the length of the meeting and is what the certificate is generated against. Select 'Next' to continue.

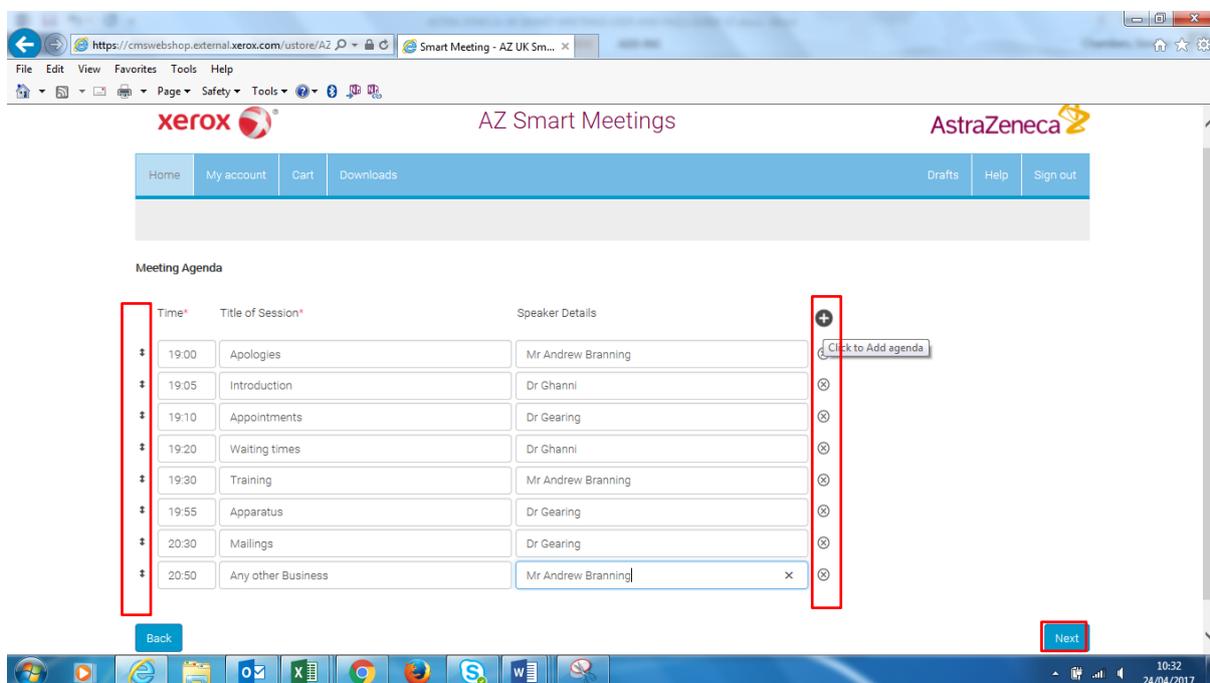
Selecting a Template



The template for the Agenda can now be selected from the options 'DNA' or 'Petal'. The number of pages can be specified by selecting from the 'Page' option either 4, 6, or 8, select 'Next' to continue.

NB: The 6pp and 8pp template provide a return coupon and envelope for recipient response via Royal Mail, this is managed by Xerox in Leeds. Responses can also be made via phone or email. Responses to 4pp invites are by phone or email only.

Meeting Agenda



Once template choices have been selected this leads onto the Agenda where items for discussion can be added with timings. To add or remove items click the cross or plus respectively to the right of Speaker Details, up to 16 Agenda items can be added for the larger 8pp template, the 4pp and 6pp template are restricted to 8 Agenda items.

To move items within the Agenda this is easily achieved by dragging the arrows to the left of the timings to the new position. Select 'Next' to continue.

Upload Recipient List

The screenshot shows the 'Upload Recipient List' form in the AZ Smart Meetings portal. The form includes a file selection field with a 'Browse...' button, a 'List Name' field containing 'RecipientListTemplate.xls', and a 'Download Recipient List Template ->' link. Navigation buttons 'Back' and 'Next' are visible at the bottom of the form area.

At the following stage your list of attendees can be uploaded as an Excel file by Selecting '**Browse**' > **Filename**, or alternatively select '**Download Recipient List Template**' which will provide a blank Excel file in order to enter your recipient details.

When the file has been selected choose '**Next**' to continue.

Imported Attendees

The screenshot displays the 'Imported Attendees' table in the AZ Smart Meetings portal. The table has columns for Title, Firstname, Surname, Account Name, Address Line 1, Address Line 2, Address Line 3, and City. Below the table, there is a summary box showing 'Number of recipients: 30' and a 'Change Recipient List' link. Navigation buttons 'Back' and 'Next' are visible at the bottom of the table area.

Title	Firstname	Surname	Account Name	Address Line 1	Address Line 2	Address Line 3	City
Mr	Aaron	Aasberg	TSB	Portland House	10 The Ghyll	Harehills	LEE
Sister	Ruksana	Patel	Astra Zeneca	Waring Place	12 Blacker Road	Birchfield	BIR

The following screen displays the Number of Recipients. Filters are available applicable to the headings enabling filtering of the data.

'**Change Recipient List**' is also an option if you have uploaded the wrong list. To continue select '**Next**'.

Filtering information

The screenshot shows the 'AZ Smart Meetings' interface. A table lists recipients with columns for Surname, Account Name, Address Line 1, Address Line 2, Address Line 3, City, and Region. The 'City' column has a search box containing 'LEEDS'. A dropdown menu is open, showing filter options: No filter, Contains, Does not contain, Starts with, Ends with, Equal to, Not equal to, Is empty, and Not is empty. The 'Next' button is highlighted in red.

Surname	Account Name	Address Line 1	Address Line 2	Address Line 3	City	Region
Aaberg	TSB	Portland House	10 The Ghyll	Harehills	LEEDS	
Christie	Astra Zeneca	Portland House	17 Commercial Street	Beeston	LEEDS	
Jackson	Morrisons	Portland House	24 Commercial Street	Harehills	LEEDS	
Alli	Morrisons	Portland House	31 Commercial Street	Beeston	LEEDS	
Branning	Morrisons	Jennings Place	38 Smithson Street	Beeston	LEEDS	

Filters can be used to search for information within the columns by entering the search criteria above the columns and selecting the applicable filter criteria. The results will be then be displayed enabling locating information easily.

To remove the filter select 'No Filter', Select 'Next' to continue.

Order Summary

The screenshot shows the 'Order Summary' screen. It displays the following information:

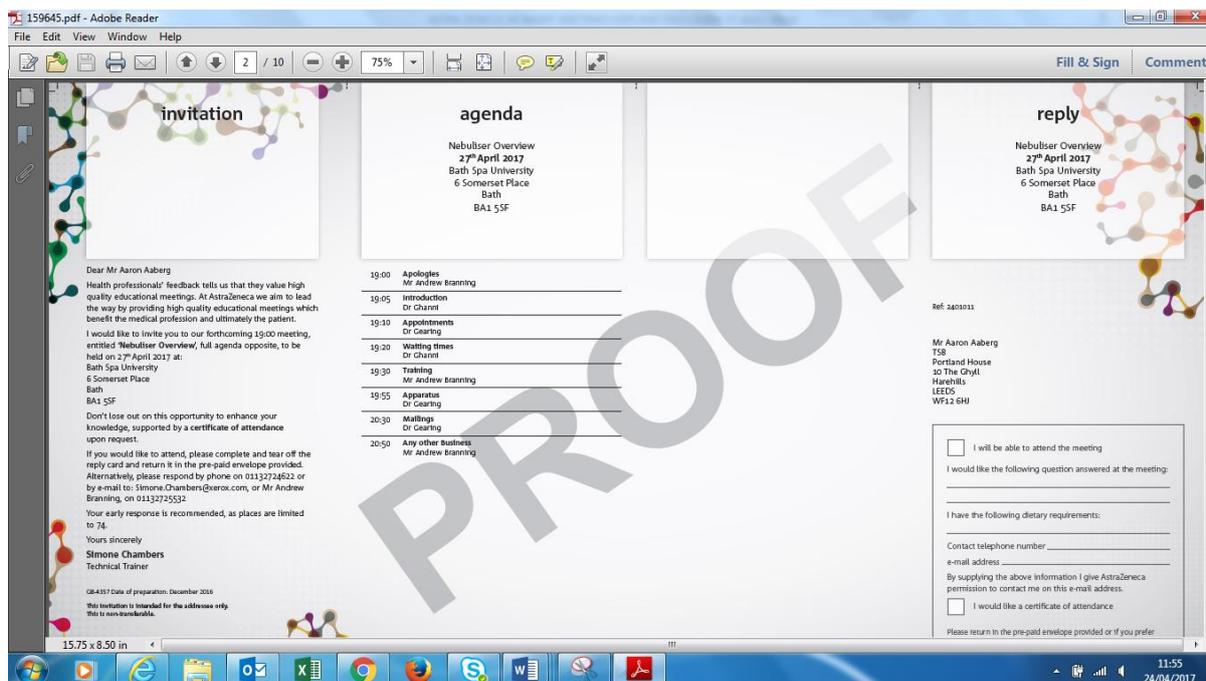
- Total Quantity: 30 items
- Number of recipients: 30
- Total price: £39.00 GBP

There is a 'PROOF' button with a checkmark icon and a checkbox labeled 'Proof is approved *'. Below this, a message states: 'The proof will be rendered, which might take a while. The proof shows the first 5 recipients of your list.' The 'Next' button is highlighted in red.

The following screen shows a summary of the order indicating > 'Total Quantity' > 'Number of recipients' > 'Total price'.

To confirm all details are correct and preview the proof select 'PROOF'. A prompt will appear providing the option to 'Open' or 'Save' the proof. Once previewed select 'Submit' to complete the process.

PDF Proof

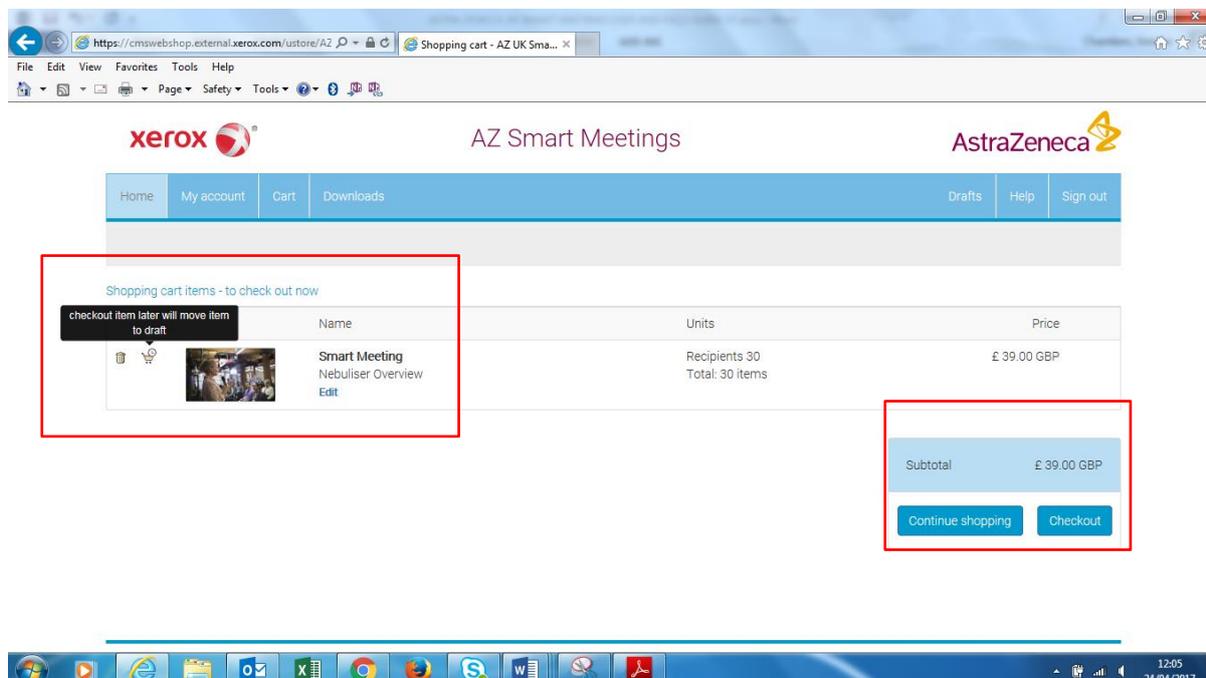


The 'Proof' is shown in a PDF format and is populated with the details created for each Recipient added when the 'Recipient List' was uploaded. Should any revisions be required please navigate by selecting the 'Back' button located under 'Proof', this will not affect any data previously uploaded.

The 6pp and 8pp template provides the Attendee with an RSVP option where they can add their dietary requirements and ask any relevant questions prior to the meeting. Responses can then be tracked by the user and managed by TLG. Select 'Submit' if not already completed.

NB: When viewing the proof it will only show the first 5 recipients to avoid additional time spent on rendering of the file.

Shopping Cart



The shopping 'Cart' provides the option to 'delete this item' > 'checkout item later,' which will move the item to the Drafts, > 'Continue shopping' > 'Checkout'. If happy with the order select 'Checkout'.

Submitting your Order

https://cmswebshop.external.xerox.com/uStore/AZ

Checkout - order summary ...

xerox AZ Smart Meetings AstraZeneca

Home My account Cart Downloads Drafts Help Sign out

Ordered items			
	Name	Units	Price
	Smart Meeting Nebuliser Overview	Recipients 30 Total: 30 Items	£ 39.00 GBP
Total:			£ 39.00 GBP

After submitting this order, there is no further opportunity to amend any details, as it is an automated process to production. Please ensure all details are correct prior to submission.

Back Submit Order

To confirm all details are correct and complete the order select **'Submit Order'**.

Order Confirmation

https://cmswebshop.external.xerox.com/uStore/AZ

Order summary - AZ UK S...

xerox AZ Smart Meetings AstraZeneca

Home My account Cart Downloads Drafts Help Sign out

Your order has been received successfully.
Order number: 2401011

Print order details Continue Shopping

AZSmartMeetings@az.xerox.com
AZ Smart Meetings: New Order auto Approved: #2401...
Xerox Print & Marketing Services for AstraZeneca

Once Checkout has been selected an Order number will be provided for reference purposes. An email confirmation will be sent providing details of your order.

At this stage there is the option to **'Print order details'** or **'Continue Shopping'**, select **'Print Order details'**.

Print Order Details

Receipt - Internet Explorer

[Print](#)

Receipt: AZ UK Smart Meeting Order Number 2401011

Dear Simone Chambers,
Your order has been received successfully.
Order Number: 2401011
Order Date: 24/04/2017 12:15:30

Billing Address
AstraZeneca UK Marketing Company
Horizon Place
600 Capability Green
Luton, LU1 3LU
United Kingdom

Purchase Details

Product	# of recipients	Quantity per recipient:	Total # of units	Delivery service	Subtotal
Smart Meeting	30	1 item	30 items	Shipping	£39.00

Delivery details

Shipping Service: No Delivery	To address AstraZeneca UK Marketing Company Horizon Palace 600 Capability Green Luton, LU1 3LU Address reference:	Order items: Shipment items Units Smart Meeting 900 items	Delivery price: -
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Selecting the option to **'Print order details'** will provide a printout of your receipt with confirmation that your order has been successfully received.

Select **'Continue Shopping'** to return to the **'Homepage'**.

Homepage

https://cmswebshop.external.xerox.com/uStore/AZ

AZ UK Smart Meeting

File Edit View Favorites Tools Help

Home My account Cart Downloads Drafts Help Sign out

My recent orders: All(0) Rejected(0) Pending(0)

Smart Meetings

Xerox Marketing Services

Welcome to your print & marketing services portal

Here you can select and order various print and marketing items, by simply browsing the selections shown on the left. If your requirements do not match any of the pre-specified products, there is also the option to obtain bespoke design & print.

13:43 24/04/2017

Selecting the **'Home'** button will return you to the **'Homepage'** where the option is available to check **'My recent orders' > 'All' > 'Rejected' > 'Pending'**.

Order Status

Order ID: 2401011

View: All orders, Rejected Orders, Orders in progress

Order#	Order date	Meeting title	Total amount	Status
3212011	24/04/2017	Training Update	£ 35.82 GBP	In progress
1381011	24/04/2017	Nebuliser	£ 35.82 GBP	In progress
2401011	24/04/2017	Nebuliser Overview	£ 39 GBP	In progress

Clear search results

Selecting 'My Recent Orders' > 'All' displays all orders. Searching for a specific order can also be carried out by placing the 'Order ID' in the box and clicking on the search icon.

Orders can be filtered to show > 'Rejected orders' > 'Orders in progress'.

To start a new search select the 'Clear search results'.

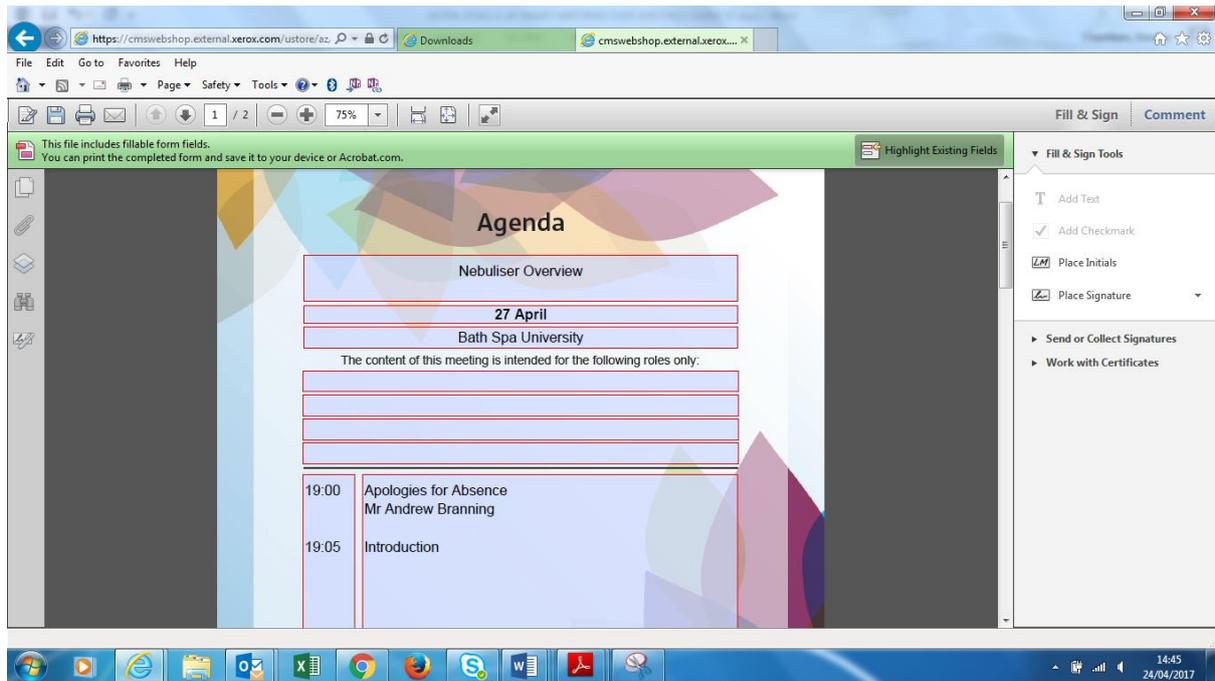
Downloads

Templates

1. Editable Agenda DNA
2. Editable Agenda DNA 2pp
3. Editable Agenda Petal
4. Editable Agenda Petal 2pp
5. Editable Certificate DNA
6. Editable Certificate Petal
7. Recipient Data Template
8. Smart Meeting Agenda Builder

Selecting the 'Downloads' button enables the user to download editable templates for agendas and certificates for local print. The 'Recipient Data Template' is also available providing a blank Excel file in order to add Recipients' details.

Editable Agenda / Certificate



The Editable Agenda / Certificate provides an individual copy for each of the Attendees in PDF format, these can be edited, saved or viewed as required.

NB: These are editable generic documents which are downloaded and completed by the organiser, they are not part of the customisation process.

AZ Smart Meetings FAQ's

1. **How many agenda items can I add to my invites?**
The 4pp and 6pp invites have a maximum of 8 Agenda slots. The 8pp has 16 Agenda slots.
2. **Is there a character limitation on meeting title?**
Yes, this is limited to 95 characters.
3. **Is there a character limitation on 'title of session' and 'Speaker details'?**
Yes, this is 100 and 193 characters respectively.
NB: We have provided an .xls template to enter data prior to loading on the system. This may assist in constructing the invite prior to entering the data on the system, as it advises of character limits. You can find the template in the '**Downloads**' tab.
4. **How do I get the latest template to upload my data?**
You can download a data template at the step where you upload your list. Just click the button '**Download recipient list template**' to open the correct .xls template.
You can also access the template in the '**Downloads**' section on the top control bar on the home screen.
5. **Are there limits on the number of records I can upload?**
The minimum number is 25 and the maximum is 1250 target records.
6. **Can I change or amend my list once uploaded?**
As long as you have not submitted your order, you can back navigate using the '**Back**' buttons at the foot of the screen (NOT the browser back button), and select '**Change recipient list**'.
7. **The system has rejected my list, what do I do?**
On list rejection, an error message in red type will be displayed. Common issues to check are;
 - **Incorrect file format of list**, please check you are using the correct format. If the columns are different the system will reject it, as it will lead to incorrect placement of copy on the finished item. Please download the correct template, drop your data in and re-submit.
 - **Missing data** – If a line has data missing in mandatory fields (i.e. name, address 1) it will be rejected. Please review your data and correct.
 - **Field lengths exceeded** – Limits are placed on some fields, such as practice name and address to 75 characters, to ensure they fit in a window envelope. Check for excessively long fields and shorten as necessary.
 - **Data too short/long** – lower limit is 25 records and max in 1250.
8. **I notice an error on my on-screen proof, can I change it?**
Yes, just select the 'Back' buttons at the foot of the page and amend the necessary fields.
9. **Will I lose my data if I go back and amend?**
No, the system retains your existing data and information.
10. **I have been side-tracked by a call, do I need to start again?**
No the system will add your order to a Drafts folder. Click '**Drafts**' on the top RH of the home screen and press the '**Continue**' button to recommence where you left off.

11. I've submitted my order, and need to change something, what can I do?

The system operates a direct to print model with no manual intervention. If you recognise your error quickly, please contact the Xerox Account team who may be able to stop the order from printing. You will then need to re-raise the meeting request.

12. How does the response collection work?

For 6pp and 8pp invites, returned reply slips are received by Xerox's mail handler. They access the system, navigate to the order number, access the data and enter the details of the person accepting the invite.

The AZ originator can view this file by navigating to '**Order list**' on the main toolbar, then clicking the relevant order number.

13. Does the system hold the mailing and response data for all historic jobs?

No mailing data is automatically deleted from the system 15 days after the date of the meeting to comply with data privacy law. If needing to record response data please do so promptly after the meeting date.

14. Can I add a speaker biography to the invite?

This is under review by AZ, so currently no.