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eBusiness

SIEBEL LIFE SCIENCES PORTALS GUIDE

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Introduction

This guide provides documentation for the Siebel Life Science Portals.

This book will be useful primarily to people whose titles or job descriptions match one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide has chapters describing each of the Siebel Life Sciences portals, as well as a chapter describing implementation tasks common to all of the portals.

It should be used in combination with other books in the Application Administration section of the *Siebel Bookshelf* CD-ROM, particularly *Siebel Life Sciences Guide*.

Revision History

Siebel Life Sciences Portals Guide, Version 7.5

Siebel Life Sciences Portals

1

The Siebel Life Sciences portals extend the functionality of the Siebel Life Sciences across the Internet to healthcare professionals, site personnel, and consumers. The Siebel Life Sciences portals allow pharmaceutical companies to provide service to their entire customer base and significantly lower transaction costs by using the communications power of the Internet.

There are three prebuilt portals: Physician Portal, Site Portal, and Consumer Portal. Siebel Life Sciences portals are integrated into the Siebel family of applications and capture all customer interactions in the same centralized data repository.

Physician Portal

The Siebel Life Sciences Physician Portal is an application that provides health care professionals with relevant and up-to-date health and pharmaceutical information over the Web. The Physician Portal allows pharmaceutical companies to strengthen their relationships with professionals by expanding their reach and coverage while reducing their cost of service.

The Physician Portal provides the ability to:

- Modify personal information, including what insurance plans the health care professional belongs to and accepts.
- Order pharmaceutical samples over the Web.
- View interactive product details and read product literature.
- Offer information on medical seminars or upcoming meetings and register online for sessions associated with these seminars and meetings.
- Log medical requests or product complaints and view solutions for these requests or FAQs.
- Request a sales representative to visit the medical professional at a date and time convenient for the professional.

For more information, see [Chapter 3, “Physician Portal.”](#)

Site Portal

The Siebel Life Sciences Site Portal allows pharmaceutical and biotech companies to strengthen their relationships with investigators and site coordinators by providing real-time information and valuable tools to assist in the administration of clinical trials. The Site Portal helps pharmaceutical and biotech companies to recruit clinical trial subjects and investigators by using the self-service capabilities of the Internet.

Pharmaceutical companies, biotech companies, and contract research organizations (CROs) can use the Site Portal to communicate with sites. These sites can manage clinical trial information and activities over the Web. The Site Portal provides the ability to:

- Modify site and site personnel details.
- View and manage protocol information, including subject and payment data.
- Generate subject visits and activities.
- View scheduled visits in daily, weekly, and monthly calendars.
- View solutions to previously asked questions.
- View products by therapeutic class and view media about a specific product.
- View a list of literature for related products.
- View medical requests and add new requests.
- View product complaints and add new complaints.
- Administer the site, for example, to add new users.

For more information, see [Chapter 4, “Site Portal.”](#)

Consumer Portal

Healthcare is one of the most popular reasons for consumers to search the Internet. Consumers are accessing the Internet to get prescriptions, learn more about health conditions, and research products.

The Siebel Life Sciences Consumer Portal is an application that provides consumers with relevant and up-to-date health and pharmaceutical information over the Web. The Consumer Portal provides the ability to:

- Customize information on product information and communication channels.
- View products based on disease states (markets) and search for products.
- Read literature on disease states of interest.
- Review previously asked questions on a FAQs screen.

For more information, see [Chapter 5, “Consumer Portal.”](#)

Before the Siebel Life Sciences portals can be used, certain implementation tasks must be performed. These include the following:

- Installing Siebel Life Sciences applications
- Customizing the user interface
- Controlling user access to your Web site, as well as to views and information within the Web site
- Setting up price lists to control product visibility
- Defining products
- Setting up Siebel Personalization
- Setting up searching
- Customizing email notifications

NOTE: After installing the Siebel Life Sciences portals and performing any desired configuration, you must add links to these new pages from the appropriate places on your Web site. For example, if you are using the Consumer Portal to provide customer support, you might want to add a conspicuous link on your company home page to direct people there.

Installing Siebel Life Sciences Applications

To use the Siebel Life Sciences portals, you must install the following:

- **Siebel Web Engine and Related Components.** To deploy information on the Web, you must install Siebel Web Engine and the components on which it depends: a Web server, Siebel Gateway Server, and Siebel Server.
- **Siebel Life Sciences employee applications.** To perform administrative tasks such as server administration, creating catalogs, and managing Siebel Workflow processes, you must install a Siebel Life Sciences employee application such as Siebel ePharma or Siebel eClinical.
- **Siebel Life Sciences portals.** To use the Siebel Life Sciences customer applications (portals), you must install them using the license keys provided.

For information about installing Siebel components, see the *Siebel Server Installation Guide* for the operating system you are using.

Customizing the User Interface

Some of the modifications that you might want to perform to change the look and feel of your Web site are the following:

- Modifying Web templates
- Changing colors
- Modifying the behavior caused by clicking a button
- Adding or removing applets
- Changing controls
- Making fields in forms required
- Deployment without using frames

For information on customizing the user interface, see *Siebel Tools Reference* and *Developing and Deploying Siebel eBusiness Applications*.

Creating a Multilingual Web Site

Web sites can be deployed in more than one language. For information about deploying Siebel applications in a multilingual environment, see *Global Deployment Guide*.

Controlling User Access

Some of the tasks that you might want to perform to control user access in your Web site are the following. They are not necessarily performed in the order listed here.

- Using external authentication, such as LDAP
- Creating database users for LDAP to use in database access
- Defining visibility for the following:
 - Views (see [“Setting Up Default Responsibilities” on page 17](#))
 - Catalogs and categories (see [“Defining Access Groups” on page 18](#))
 - Products (see [“The Default Price List for the Siebel Life Sciences Employee Application” on page 19](#))
- Assigning the proxy employee
- Creating users through registration or user administration
- Associating users with accounts
- Allowing various levels of access:
 - Anonymous
 - Implicit login
 - Explicit login
- Customizing access to home and login pages
- Using single sign-on functionality

- Allowing another system to log in
- Adding fields to registration forms

For information on controlling user access, see *Security Guide for Siebel eBusiness Applications*.

Setting Up Default Responsibilities

Responsibilities control which portals and which views within those portals are visible to the user. The responsibilities predefined for the Siebel Life Sciences portals are the following:

- **Web Anonymous User.** Allows anonymous users to access the login page to register.
- **Registered Customer Professional.** Register user of the Physician Portal.
- **Registered Customer Site.** Register user of the Site Portal.
- **Registered Customer Consumer.** Register user of the Consumer Portal.
- **Web Delegated Administrator Professional.** Has access to the Administration page in the Physician Portal. Can add and remove users and update their information.
- **Web Delegated Administrator Site.** Has access to the Administration page in the Site Portal. Can add and remove users and update their information.
- **Web Delegated Administrator Consumer.** Has access to the Administration page in the Consumer Portal. Can add and remove users and update their information.

For information on setting up responsibilities, see *Security Guide for Siebel eBusiness Applications*.

Defining Access Groups

Access groups are defined in the Access Groups view under Group Administration in the Siebel Life Sciences employee application.

An access group is a collection of any combination of positions, organizations, divisions, accounts, and user lists. For example, an access group could consist of several professionals to whom you want to grant access to a particular samples catalog.

The members of an access group are instances of party types other than Person; that is, its members cannot be individual people. A user is associated with an access group by being associated with a position, organization, division, account, or user list that is a member of the access group.

After you have defined access groups, you can associate them with catalogs and categories. Access groups determine which catalogs and categories are visible to the user. When displaying a list of products, the user will see only those products that are in categories accessible to that user.

For information on defining access groups, see *Security Guide for Siebel eBusiness Applications*.

The Default Price List for the Siebel Life Sciences Employee Application

Price lists are generally not applicable to the Siebel Life Sciences portals. However, a default price list must be set for the Siebel Life Sciences employee application to have visibility to Siebel eSamples products in the Physician Portal.

To set a default price list for the Siebel Life Sciences employee application:

- Find the row ID of the price list that contains the Siebel eSamples products.
- Enter that row ID into the PRICER_MASTER_PRICE_LIST_ID list of values (LOV).

Finding the Row ID of a Price List

The row ID of a price list can be found by choosing Help > About Record in the Price Lists view of the Pricing Administration screen in your Siebel Life Sciences employee application.

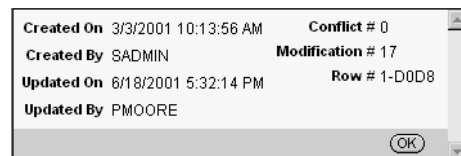
To find the row number of a price list

- 1 Navigate to Pricing Administration > Price Lists.

The Price Lists view appears.

- 2 Select the price list that contains your Siebel eSamples products.
- 3 Click Help > About Record in the application-level menu above the screen tabs.

The About Record dialog box appears.



- 4 Record the row ID (Row #) of the price list.

Setting the Default Price List

The price list row ID supplied as seed data in your Siebel Life Sciences employee application must be changed to the row ID of a price list that you have created. This is done in the List of Values view under the Application Administration screen.

NOTE: You must clear the LOV cache for the new price list to take effect.

To set the default price list

- 1** Navigate to Application Administration > List of Values.
The List of Values appears.
- 2** Query for the type PRICER_MASTER_PRICE_LIST_ID.
- 3** Enter the row number of the default price list in the Display Value field.
- 4** Click the menu button, and then choose Clear LOV Cache.

Defining Products

Products and related product information are displayed in the following places:

- eDetails, eSamples, and Product Info pages in the Physician Portal
- eDetails and Product Info pages in the Site Portal
- Product Info and Disease State Info pages in the Consumer Portal

Products are defined in the Product Administration screen in your Siebel Life Sciences employee application. Some of the tasks involved in defining products are the following:

- Defining product lines
- Creating products
- Associating literature and images with products
- Defining related products

NOTE: You can also create new products using the Catalog Administration screen. For more information, see [“Associating Products with Categories” on page 35](#).

For information on defining products, see *Siebel Life Sciences Guide* and *Product Administration Guide*.

Using Siebel Personalization

Siebel Personalization enhances your Web site by showing customers information that is specific to their profile, interests, and history. Personalized content includes greeting users by name, presenting them with content targeted to their needs and interests, showing them recommended products, and sending email messages addressed to them.

Siebel Personalization allows you to define rules to show and hide content dynamically during a user's experience with your Web site.

Personalization deployment rules can depend on data such as users' personal profile information, date ranges, their company, products or services they have already ordered, or geographical information. User data can also be captured dynamically while the customer is browsing the Web site.

The home page includes the salutation in the upper-left corner. This salutation typically includes a personal greeting, but can be configured to provide targeted content such as product promotions, announcements, birthday greetings, medical request updates, and FAQs.

Conditional expressions can be used to hide applets depending on the application, the type of user, and whether the applets have any records in them.

Personalization is principally managed using the Personalization Administration screen in your Siebel application. For information about administering personalization, see *Personalization Administration Guide*.

Setting Up Full-Text Search

Siebel eSearch is the customer application deployment of Siebel Search, which allows users to scan database tables and documents for pertinent information. Siebel Search uses Hummingbird, Ltd. SearchServer, an indexing and retrieval search engine. Siebel Search is included with every license of a Siebel application.

The Siebel Life Sciences portals include a Siebel eSearch form that uses the Hummingbird, Ltd. SearchServer engine to scan database tables and documents in the Siebel File System. Users can perform searches from any screen by entering text in the Search text box and clicking Go.

Database records and documents in the Siebel File System that contain the criterion text are returned in the Search Results list. Search results are ranked according to relevance and sorted according to rank. Users can click on a linked field to see the detail for a record.

Implementing Siebel eSearch

Implementing Siebel eSearch involves the following tasks:

- Installing Hummingbird, Ltd. SearchServer
- Setting up a directory for the search indices
- Setting up ODBC drivers
- Creating and indexing the search tables

For information about the installation and administration of Siebel Search, see *Siebel Search Administration Guide*.

Predefined Search Definitions for the Siebel Life Sciences Portals

Search definitions are created in Siebel Tools. By default, Siebel eSearch in the Siebel Life Sciences portals searches the business components shown in [Table 1](#). This capability can be extended by creating additional search indices.

Table 1. Searchable Business Components

Portal	Search Field Picklist Name	Business Component	Searchable Fields
Physician	eDetails	Admin Sales Tool	Name, Description
	External Document	External documents are part of the Siebel file system and are not associated with a business component.	Not applicable. You can search on their titles and text.
	FAQs	Solution	Name, Solution, FAQ
	Product Info	Admin Sales Tool	Name, Description
Site	eDetails	Admin Sales Tool	Name, Description
	External Document	–	–
	FAQs	Solution	Name, Solution, FAQ
	Product Info	Admin Sales Tool	Name, Description
Consumer	Disease State	Admin Sales Tool	Name, Description
	External Document	–	–
	FAQs	Solution	Name, Solution, FAQ
	Product Info	Admin Sales Tool	Name, Description

For information about creating search definitions for Siebel Search, see *Siebel Tools Reference*.

Customizing Notifications

The Siebel Life Sciences applications can send email notifications to users, for example when the status of a professional's sample order is changed to Confirmed or Shipped.

The tasks involved in customizing notifications are the following:

- Setting up communications driver profiles
- Modifying email workflow processes
- Modifying email templates

For information on creating notifications, see *Siebel Communications Server Administration Guide*.

Setting Up Communications Driver Profiles

Communications drivers send messages. They are accessed using communications driver profiles, which set parameters that can override those of the driver.

Communications drivers are provided out of the box. Profiles are created in the Communications Drivers and Profiles view under the Communications Administration screen.

For information about setting up communications driver profiles, see *Siebel Communications Server Administration Guide*.

Modifying Email Business Processes

Notifications are controlled by business processes. These processes can be modified and new ones can be created.

For more information about defining rules to enable automatic email notification, see *Siebel Business Process Designer Administration Guide*.

Modifying Email Templates

Templates provide the content for automated messages, such as confirmations of orders being placed and shipped. They are created and modified in the All Templates view under the Communications Administration screen.

To modify an email template

- 1 Navigate to Communications Administration > All Templates.

The All Templates view appears.

- 2 Select a template, such as Order Confirmation.

- 3 Make modifications to the template text.

You can also copy and paste available substitutions, such as [Street Address].

- 4 Click the Template Items tab to add preformatted files, such as a standard header or footer.

The Siebel Life Sciences Physician Portal allows you to provide health care professionals with health and pharmaceutical information over the Web.

When registered Physician Portal users log in, they can click the tabs to see the following pages of the Physician Portal:

- **Home Page.** A user can click hyperlinks to see information such as the user's orders, medical records, MedEd Events, and information about featured pharmaceutical company products.
- **eSamples.** Optional module. A user can view a list of products in a pharmaceutical company's product catalog and order samples. Clicking on a hyperlink displays detailed descriptions of the product. A user can also check the status of an order. Products can be added and removed from an order.
- **eDetails.** Optional module. A user can examine a specific product by market. By clicking on a hyperlink, the user can obtain a list of literature or media types that offer information about the selected product.
- **eMedEd.** Optional module. A user can view events information and check the details on individual seminars within an event. After viewing information on upcoming meetings, the user can sign up for an event online.
- **Product Info.** A user can view product literature associated with the product. By clicking on the market hyperlink, the user can review product information and subsequently a list of product literature.
- **Request a Visit.** A user can request a visit from a pharmaceutical sales representative. The user can request the visit for a specific date and time. A visit can be cancelled after it has been submitted. A user can view a list of his or her own previously requested visits.

- **Medical Requests.** A user can request product and medical information. By clicking a Medical Request Number hyperlink, the user can view and examine further details of any solutions or attachments that can include product or medical information.
- **Product Complaints.** A user can view the details of a product complaint. By clicking a Product Complaint Number hyperlink, the user can view and examine further details of any solutions or attachments that can include product or medical information.
- **FAQ.** A user can view a list of previously asked questions.
- **Administration.** A registered user, with delegated administrator responsibility, uses this page to create new registered Physician Portal users and to edit login data for existing users. The Administration tab and page are visible to delegated administrators only.

About Creating Product Catalogs for the eSamples Page

Catalogs are used in the Physician Portal to display products that can be ordered using the eSamples page.

A catalog is a collection of items arranged in a logical hierarchy of categories. A schematic of a product catalog is shown in [Figure 1](#).

- Categories can contain content items and other categories (called subcategories).
- Each category can belong to only one catalog and one parent category.
- Products can be associated with multiple categories.

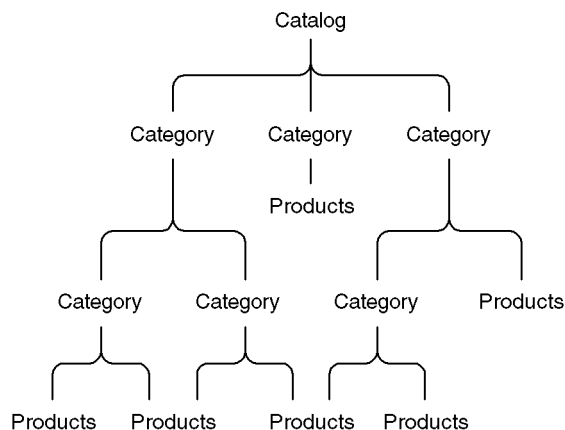


Figure 1. Catalog Hierarchy

Catalogs are created and managed using the following steps:

- Setting up the catalog
- Setting up its categories
- Building the catalog hierarchy

Setting Up Catalogs

The tasks involved in setting up catalogs are the following:

- Creating catalogs
- Assigning access to catalogs
- Selecting languages for catalog translation

Creating Catalogs

You create catalogs on the Catalogs page in the Catalog Administration screen.

To create a catalog

- 1** Navigate to Catalog Administration.

The Catalogs list appears.

- 2** Add a new record.

The Catalogs form appears under the More Info tab.

- 3** Fill in the following fields using the form under the More Info tab.

Field	Description
Name	Required.
Description	Brief description of the catalog.
Private	Check the box if you want the catalog to be visible only to users who belong to the access groups associated with it. If the catalog is private, all of its categories will also be private.
Effective Start Date	Date when the catalog becomes available for use.
Effective End Date	Date when the catalog stops being available.
Active	Check the box to make the catalog available.

Field	Description
Catalog Type	Choose Buying from the drop-down menu. Only catalogs of type Buying are shown on the Physician Portal.
Image	Image file associated with the catalog.

- 4 Fill in a number in the Sequence field in the Catalogs list.

Catalogs are displayed on the Physician Portal in ascending order by their Sequence field.

Assigning Access to Catalogs

Access groups control which groups of users can see particular catalogs. Access groups are associated with catalogs under the Access Groups tab in the Catalog Administration screen.

For information on creating access groups, see *Security Guide for Siebel eBusiness Applications*.

To associate an access group with a catalog

- 1** Navigate to Catalog Administration.

The Catalogs list appears.

- 2** Select a catalog in the Catalogs list.

- 3** Click the Access Group tab.

The access groups associated with the catalog appear.

- 4** Add a new record to the Access Group list.

A dialog box appears.

- 5** Select an access group, and then click Add.

The access group appears under the Access Group tab.

Selecting Languages for Catalog Translation

You can set up your catalogs in multiple languages. This is done under the Catalog Translations tab in the Catalog Administration screen.

For more information about working with catalogs, see *Siebel eSales Administration Guide*.

For more information about creating multilingual Web sites, see *Global Deployment Guide*.

To choose a language for translation

- 1** Navigate to Catalog Administration.

The Catalogs list appears.

- 2** Select a catalog in the Catalogs list.

- 3** Click the Catalog Translations tab.

Languages for translation appear.

- 4** Add a new record to the Catalog Translations list.

- 5** Click the icon in the Code field.

The Language Name dialog box appears.

- 6** Select a language, and then click OK.

The language name and code appear in the Catalog Translations list.

- 7** In the Description field, type a description of the catalog in the new language.

Setting Up Categories

Categories group content items, such as products. The tasks involved in setting up categories are the following:

- Creating categories
- Associating products with categories
- Updating the category item count (and removing it if necessary)
- Setting display templates for categories
- Assigning access to categories
- Selecting languages for category translation

Creating Categories

Categories are created in the Catalog Administration screen under Categories. They are displayed on the Physician Portal in ascending order by their Sequence field.

To create a category

- 1** Navigate to Catalog Administration.
The Catalogs list appears.
- 2** Click the hyperlinked name of the catalog to which you want to add categories.
The Categories list displays the categories belonging to that catalog.
- 3** Add a new record.
The Categories form appears under the More Info tab.
- 4** Fill in the following fields.

Field	Description
Name	Required.
Display Name	Required. Name that the Web site visitor sees.
Sequence	Sequence in which categories are displayed, in ascending order starting with 0.

Field	Description
Description	Brief description of the category.
Effective Start Date	Date when the category becomes available for use.
Effective End Date	Date when the category stops being available.
Active	Check the box to make the category available.
Private	Check the box if you do not want the category to inherit access properties from its parent category. If the parent category has been marked private, this category also must be private.
Usage	Type of category. Choose one from the picklist.
Display Template	Template for displaying the category on the Physician Portal. Choose one from the drop-down list.
Image	Image file associated with the category.

Associating Products with Categories

You add products to catalogs by associating them with categories that belong to those catalogs. This is done using the Products tab in the Categories view under the Catalog Administration screen.

NOTE: The customer will only be able to view products that are both on the activated price list and in catalogs and categories associated with the same access groups with which that customer is associated. For more information, see [“The Default Price List for the Siebel Life Sciences Employee Application”](#) on page 19.

All products that are in samples catalogs should have the type Sample.

For information on defining products, see *Product Administration Guide*.

To associate products with a category

- 1 Navigate to Catalog Administration.

The Catalogs list appears.

- 2 Click the name of a catalog.

The Categories list displays the categories belonging to that catalog.

- 3 Select a category with which to associate products.

- 4 Click the Products tab.

The products associated with the category appear.

- 5 Add a new record to the Products list.

A query pop-up window appears.

- 6 Enter query terms, and then click Go or Cancel.

The Add Internal Products dialog box appears with query results if you clicked Go, or with a list of products if you clicked Cancel.

- 7 Select products, and then click OK.

The products are associated with the category and appear under the Products tab.

- 8 You can also click New in the dialog box.

This adds a new record under the Products tab, where you can enter information about the new product.

Updating the Category Item Count

The category item count displayed at run time reflects the total number of items in each category. You must update it after adding new products to categories.

To update the category item count

- 1 Navigate to Catalog Administration.

The Catalogs list appears.

- 2 Click the name of a catalog.

The Categories list displays the categories belonging to that catalog.

- 3 Select a category.

- 4 Click the menu button under the Categories tab, and then choose Update Count.

The category item count is updated for that category.

Removing the Category Item Count

The category item count reflects the total number of items in the category. Certain users might not have access to all of the items in a category. If so, the count would not be accurate for those users.

If this does not meet your needs, you can use Siebel Tools to remove the display of the count from the following applets by making the count inactive:

- Product Catalog RootSubCategory List Applet (eSales)
- Product Catalog SubCategory List Applet (eSales)

To remove the category item count

- 1 In Siebel Tools, lock the eCatalog project.
- 2 Select the Applet object.
- 3 Query for the appropriate applet.

- 4** Select Base, expand the Applet Web Template object, and then select Applet Web Template Item.

The Applet Web Template Items list appears.

- 5** In the Count row, select the Inactive check box.

The Count record text turns red.

- 6** Save the project.

- 7** Compile the .srf file, selecting the Locked projects radio button.

Setting Display Templates for Categories

Display templates allow you to choose how categories and their products are displayed on the Physician Portal. Display templates are associated with categories when the categories are created or edited. The following procedure assumes that the category already exists.

To set a display template for a category

- 1 Navigate to Catalog Administration.

The Catalogs list appears.

- 2 Click the name of a catalog.

The Categories list displays the categories belonging to that catalog.

- 3 Select a category.

- 4 Choose a display template from the drop-down list below Display Template under the More Info tab.

The chosen template will be used to display the category contents in the Siebel eSamples catalog.

Assigning Access to Categories

Access groups control which groups of users can see particular categories. Access groups are associated with categories under the Access Group tab.

To associate an access group with a category

- 1 Navigate to Catalog Administration.

The Catalogs list appears.

- 2 Click the name of a catalog.

The Categories list displays the categories belonging to that catalog.

- 3 Select a category.

- 4 Click the Access Group tab.

The access groups associated with that category appear.

- 5 Add a new record to the Access Group list.

A dialog box appears.

- 6 Select an access group, and then click Add.

The access group appears under the Access Group tab.

Selecting Languages for Category Translation

You can choose the languages for which to translate category information. This is done under the Category Translations tab.

For more information on creating multilingual Web sites, see *Global Deployment Guide*.

To choose a language for translation

- 1 Select a category.

- 2 Click the Category Translations tab.

Languages for translation appear.

- 3 Add a new record to the Category Translations list.

- 4 Click the icon in the Code field.

The Language Name dialog box appears.

- 5 Select a language, and then click OK.

The language name and code appear in the Category Translations list.





- 6 Fill in the remaining fields, as shown in the following table.

Field	Description
Display Name	Name in the new language that the Web site visitor sees.
Description	Brief description of the category in the new language.
Extended Description	More detailed description of the category in the new language.

Building Catalog Hierarchies

Catalog hierarchies determine the structure and navigation paths of catalogs. Hierarchies are built and modified by using the buttons in the Categories list, as shown in [Table 2](#).

Table 2. Catalog Hierarchy Buttons

Button	Function
	Demote one level
	Promote one level
	Move up
	Move down

To create subcategories

- 1 Navigate to Catalog Administration.

The Catalogs list appears.

- 2 Click the name of a catalog whose hierarchy you want to modify.

The Categories list displays the categories belonging to that catalog.

- 3 Use the Move up and Move down buttons to place a category you want to make a subcategory beneath the category you want to make its parent.

For example, place Category 11 below Category 1.

- 4 With the child category selected, click the Demote one level button.

The subcategory appears in a tree as a node below its parent. The tree can be expanded and collapsed.

- 5 Arrange other categories below the parent category as necessary.

For example, place Category 12 and Category 13 below Category 1.

- 6** Select each category in turn and click the Demote one level button.

The subcategories are placed in the tree below the other subcategory. The Sequence field can be used to display the subcategories in the correct order on the Categories page and on the Web site.

- 7** Use the buttons as necessary to extend the catalog hierarchy.

For example, Category 12 can be made a subcategory of Category 11.

Subcategories are displayed under categories on the Web site in ascending order by sequence and then in alphabetical order by display name.

Modifying Samples Order Management Workflow Processes

Siebel Business Process Designer provides a graphical interface for designing and implementing business processes and user interactions. The Physician Portal uses Siebel Business Process Designer to control samples order management processes.

The Physician Portal uses the following business processes for samples order management:

- eSamples - Checkout Process
- eSamples - Enter Shipping Details Process
- eSamples - Complete Checkout Process
- eSamples - Authorize Order Process
- eSamples - Save Shipping Address
- eSamples - Display Error Process
- eSamples - Home Page View
- eSamples - Login View
- eSamples - Order Confirmation View

Among the modifications you can make to business processes are the following:

- Adding and deleting steps.
- Changing the branching behavior of a step.
- Displaying error messages. For this, you can use a subprocess call to the eSamples - Display Error Process workflow process.

For detailed information on modifying business processes, see *Siebel Business Process Designer Administration Guide*. For information on configuring views, see *Siebel Tools Reference* and *Developing and Deploying Siebel eBusiness Applications*.

Managing eMedEd

The optional Siebel eMedEd module for Siebel ePharma allows you to promote upcoming Medical Education events to selected medical professionals using your Physician Portal Web site. Professionals log in to the Web site by using individual user names and passwords that you supply. The Siebel MedEd section of the Web site lets each professional perform the following actions online:

- View information about upcoming Medical Education events to which that professional is invited.
- Register for Medical Education sessions.
- Cancel registrations for Medical Education sessions.

The Siebel eMedEd module requires the presence of the related MedEd module, which is accessed using the Siebel Life Sciences employee application, rather than through the Physician Portal.

To display Medical Education event information on your Siebel Physician Portal Web site, and to allow professionals to use the site for registration and cancellation, you must complete the following tasks using the Siebel Life Sciences employee application connected to the database that serves your Web site:

- Creating a Medical Education event listing.
- Creating listings for individual sessions within each event.
- Inviting selected professionals to each event.

For specific instructions on performing the tasks for setting up and administering Siebel eMedEd functionality, see *Siebel Life Sciences Guide*.

Managing Requests for Visits

A professional can request a visit by a representative of your company to discuss products or other issues. The professional can subsequently update details.

Requests for visits exist in the database as activities. When a professional submits a request for a visit, an activity is created with the following field values, as shown in [Table 3](#).

Table 3. Visit Request Activity Fields

Field	Value
Activity	General
Activity Type	Schedule An Office Visit
Status	In Progress

Activities created by requests for visits are automatically assigned to the primary sales representative. Navigate to [Activities > All Activities](#) in your Siebel Life Sciences employee application to view or modify activities.

For more information about activities, see *Siebel Life Sciences Guide* and *Applications Administration Guide*.

To request a visit from a company representative

- 1 Click the Request A Visit tab.
The My Office Visits page appears.
- 2 Click New.
The My Office Visits form appears.
- 3 Provide a description for the visit request, and then click Save.
The new request appears in the My Office Visits list.

Displaying Product Literature

Product literature can be displayed on the eDetails and Product Info pages. Professionals do the following to view product literature:

- Click the eDetails or Product Info tab to display product markets.
- Click a product market to display related products.
- Click a related product to display a list of literature associated with that product.

Use the following steps to display product information:

- Create product markets.
- Associate related products with product markets.
- Associate literature with related products.
- Choose the Web page to display the literature.

Creating Product Markets

Products for which you want to display information must have their type set to Market in the Product Administration screen. This type of product is called a product market.

For more information on creating products, see *Siebel Life Sciences Guide* and *Product Administration Guide*.

To create a product market

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Add a new record, such as Anti-Hypertensive Market.
- 3** Click in the Type field, and then choose Market from the drop-down menu.
- 4** Fill in other fields, such as Part Number and Description.

Associating Related Products with Product Markets

Related products are associated with product markets in the Related Products view under the Product Administration screen. Products that are associated with product markets usually have their types set to Detail.

NOTE: You can also associate a product with a product market by entering the name of the product market in the Parent field of the related product's record in the Products list.

To associate products with product markets

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Select a product market.
- 3** Choose Related Products from the Show menu below the More Info tab.
The Related Products list appears.
- 4** Add a new record to the Related Products list.
The Add Internal Products dialog box appears.
- 5** Select the products you want to associate with the product market, and then click OK.
The products appear in the Related Products list.
- 6** Set the Relation field for each related product to Parent.

Associating Literature with Related Products

You associate literature with products in the Product Literature list under the Product Administration screen. This literature will be displayed on the Product Info page.

To associate literature with related products

- 1 Navigate to Product Administration.

The Products list appears.

- 2 Select a product that you have associated with a product market.

- 3 Choose Product Literature from the Show menu below the More Info tab.

The Product Literature list appears.

- 4 Add a new record.

The Add Literature dialog box appears.

- 5 Select the literature to associate with the product market, and then click the Add icon.

The literature items appear in the Product Literature list.

Choosing the Web Page to Display Literature

You choose the Physician Portal page for displaying product literature by using the Literature Type field of the Literature list under the Document Administration screen:

- **eDetails page.** To display literature on the eDetails page, select eDetail as the literature type.
- **Product Info page.** To display literature on the Product Info page, select Training Literature as the literature type.

To choose the Web page to display literature

- 1 Navigate to Document Administration > Literature.

The Literature list appears.

- 2 Select a literature item that you have associated with a product or disease state.

- 3 Click in the Literature Type field, and then choose the appropriate literature type, eDetail or Training Literature, from the drop-down menu.

- 4 In the form under the More Info tab, select the Internal check box.

Making Solutions and FAQs Available

Solutions are answers to frequently asked questions (FAQs). Solutions are documented by service agents and call center administrators and are stored in the database. Agents and customers can frequently resolve service issues by searching this knowledge base of solutions.

You can associate a solution with related solutions and resolution documents through the Solutions Administration screen. In the Physician Portal, you can also associate solutions with product complaints (see [“Managing Product Complaints” on page 53](#)). The owner of a service request can associate a solution with the service request. In the Physician Portal, the service request is known as a medical request (see [“Managing Medical Requests” on page 55](#)).

A solution can be published internally or externally. Solutions published internally are accessible only by your employees. Solutions published externally are available to Physician Portal users.

Making Solutions Available

Solutions are created and administered using the Solutions Administration screen.

For information on creating and administering solutions, FAQs, and resolution documents, see the section on solutions and service requests in *Applications Administration Guide*.

To make solutions available

- 1** Navigate to Solution Administration > Solutions.

The Solutions list appears.

- 2** Select a solution to publish.

- 3** In the form below the Solutions list, select one of the following check boxes:

- Publish Internal to make a solution available to your employees.
- Publish External to make a solution available to your customers.

Viewing Solutions to Medical Requests

Professionals can view available solutions on the Physician Portal by clicking the Medical Requests tab.

To view solutions

- 1 Click the Medical Requests tab.

The Medical Requests page appears.

- 2 Click the link in the MR Number field of a medical request for more detail, such as solutions, attachments, and updates.

Assigning FAQs to Applications

FAQ documents are listings of common questions and answers on a particular topic. A frequently asked question is created by entering the question in the FAQ field of a solution record. Like all solutions, FAQs can be published internally or externally and are searchable. For FAQs and solutions to be available on your Web site, the Publish External flag must be set.

Users of each Siebel Life Sciences portal can see a different set of FAQs. Use the Permission Type field to assign a FAQ to a portal. The choices are:

- **All.** Consumer, Physician, and Site Portal users.
- **Professionals.** Physician Portal users.
- **Consumers.** Consumer Portal users.
- **Sites.** Site Portal users.

To make FAQs (solutions) available to specific users

- 1** Navigate to Solution Administration > Solutions.

The Solutions list appears.

- 2** Select the record of the FAQ you want to assign to a Siebel Life Sciences portal application.

- 3** From the drop-down menu in the Permission Type field, choose the users who can see the FAQ.

Physician Portal users can see FAQs that have the permission type set to Professionals or All.

NOTE: Leaving the Permission Type column blank allows the FAQ to show in all the applications.

Viewing FAQs

FAQs appear on the FAQ page of the Physician Portal.

To view frequently asked questions

- Click an FAQ hyperlink on the FAQ page to view the full question and its answer.

Managing Product Complaints

A product complaint is a healthcare professional's summary of information about a pharmaceutical product's undesirable or defective characteristics. All product complaints include a status, a product complaint number, an abstract, a date reported, and a date closed.

A professional submits a product complaint using the My Product Complaints list on the Product Complaints tab. The professional can check a product complaint's status by clicking the link on the complaint.

Product complaints are stored as change requests in the database. Product complaints can be viewed in the Siebel Life Sciences employee application by navigating to the Quality screen.

You can associate solutions with product complaints by navigating to Solution Administration > Solutions and clicking the Change Requests tab below the Solutions list.

Product complaints can be assigned manually to service agents, or an administrator can create assignment rules to automatically assign service requests to agents by criteria such as product expertise.

For more information on creating service request assignment rules, see *Siebel Assignment Manager Administration Guide*.

For more information on product complaints, see the section on change requests in *Siebel Life Sciences Guide*.

To submit a product complaint

- 1** Click the Product Complaints tab.
The Product Complaints page appears.
- 2** Click New.
The My Product Complaints form appears.
- 3** Provide an abstract about your complaint (and a description if you want).
- 4** Click the icon next to Product.
The Associated Products dialog box appears.
- 5** Click New.
The Add Internal Products dialog box appears.
- 6** Select a product, and then click OK.
- 7** Click OK in the Associated Products dialog box.
- 8** Click Save in the My Product Complaints dialog box.
The new complaint appears in the My Product Complaints list.

Managing Medical Requests

A medical request is a healthcare professional's request for information on products or disease states or general information. All medical information requests include a medical request number, a title, a description, and a status.

A professional submits a new medical request in the My Medical Requests list on the home page or Medical Requests page. The professional can check a medical request's status by clicking the link on the request.

Medical requests are stored as service requests in the database. Service requests can be viewed in the Siebel Life Sciences employee application by navigating to the Service Requests screen.

Service requests can be assigned manually to service agents, or an administrator can create assignment rules to automatically assign service requests to agents by criteria such as product expertise.

For information on creating service request assignment rules, see *Siebel Assignment Manager Administration Guide*.

To submit a medical request

- 1 Click New in the My Medical Requests list.

The Medical Requests form appears.

- 2 Complete the form, and then click Save.

The new medical request appears in the Medical Requests list on the Medical Requests page.

The Siebel Life Sciences Site Portal allows pharmaceutical and biotech companies to recruit clinical trial subjects, allows investigators to communicate with sites, and allows sites to manage clinical trial information and activities over the Web.

When registered Site Portal users log in, they can click the tabs to see the following pages of the Physician Portal:

- **Home Page.** A user can click the hyperlinks to view information about protocols and subjects and can use the calendar to schedule appointments.
- **eTrials.** A user can view protocol information and edit protocol details such as the subject participating in the protocol, the subject's enrollment and screening, and the address of the protocol site.
- **Calendar.** A user can enter information in a daily, weekly, and monthly calendar, and can give access to others to view the site's calendar.
- **FAQ.** A user can view a list of previously asked questions and their answers.
- **eDetails.** Optional module. A user can examine a specific product by market. By clicking on a hyperlink the user can obtain a list of literature or media types that offer information about the selected product.
- **Product Info.** A user can view product literature associated with the product. By clicking on the market hyperlink, the user can review product information and subsequently a list of product literature.
- **Medical Requests.** A user can request product and medical information. By clicking a Medical Request Number hyperlink the user can view and examine further details of any solutions or attachments that can include product or medical information.

- **Product Complaints.** A user can view the details of a product complaint. By clicking a Product Complaint Number hyperlink the user can view and examine further details of any solutions or attachments that can include product or medical information.
- **Administration.** A registered user, with delegated administrator responsibility, uses this page to create new registered Site Portal users and to edit login data for existing users. The Administration tab and page are visible to delegated administrators only.

Displaying Clinical Trials on the Home Page and eTrials Page

To display clinical trials on the eTrials page:

- Create a site, if you have not already done so.

You create sites in the My Sites list under the Site Management screen in your Siebel Life Sciences employee application. For information on creating sites, see the chapter on site management in *Siebel Life Sciences Guide*.

- Create a delegated administrator for the site.
- Add site users.

Creating a Delegated Administrator for the Site

You create delegated administrators for sites in your Siebel Life Sciences employee application. To create a delegated administrator for a site:

- Create a user with Web Delegated Administrator Site responsibility.

For information on creating users, see *Security Guide for Siebel eBusiness Applications*.

- Add the delegated administrator to the team for the site.

To add a delegated administrator to the site team

- 1 Navigate to Site Management > My Sites.

The Sites list appears.

- 2 Select a site.

- 3 Click the show more button at the top right of the detail list under the More Info tab.

The long version of the More Info detail list appears.

- 4 Click the icon in the Team field.

The Access List dialog box appears.

- 5 Click Query to find the delegated administrator you want to add to the site, and then click OK.

The delegated administrator appears in the Access List dialog box.

- 6 Click Close.

The delegated administrator is added to the team for the site.

Adding Site Users

Delegated administrators use the Site Portal to add site users who will enter and maintain clinical trial information. These users must already exist in the Siebel database; that is, their user records must already have been created in the Siebel Life Sciences employee application.

To add site users:

- Create users with Registered Customer Site responsibility.

For information on creating users, see *Security Guide for Siebel eBusiness Applications*.

- Add the Registered Customer Site position to the team for the site.
- Add users to the site.
- Add username, password, and role information for these users.

NOTE: You must use LDAP for external authentication to be able to add site users.

Adding the Registered Customer Site Position to the Site Team

This is done in the My Sites list under the Site Management screen in your Siebel Life Sciences employee application.

To add the Registered Customer Site position to the site team

- 1** Navigate to Site Management > My Sites.

The Sites list appears.

- 2** Select a site.

- 3** Click the show more button at the top right of the detail list under the More Info tab.

The long version of the More Info detail list appears.

- 4** Click the icon in the Team field.

The Access List dialog box appears.

- 5** Click New, and then query for Registered Customer Site in the Position field.

The Add Employees dialog box appears.

- 6** Select the check box, and then click OK.

The Registered Customer Site position appears in the Access List dialog box.

- 7** Click Close.

The Registered Customer Site position is added to the site team.

Adding Site Users

Delegated administrators add users to the site using the Profile page in the Site Portal.

To add site users

- 1** Click the Profile button at the upper right of any Site Portal page.

The Site Profile page appears.

- 2** Click New in the Contacts list.

The Contacts form appears.

- 3** Click the icon in the Last Name field.

The Pick Contact dialog box appears.

- 4** Pick a user, and then click OK.

That user's information appears in the Contacts form.

- 5** Click Save.

The user is added to the Contacts list for the site.

Adding Login and Role Information for Site Users

Delegated administrators add site user information using the Administration page in the Site Portal.

To add login and role information for site users

- 1** Click the Administration tab.

The Site Profile page appears.

- 2** Click the Edit icon in the record of the user for whom you want to add information.

- 3** The Users form appears with the required Last Name and First Name field already completed.

- 4** Add a role for the site user:
 - a** Click the icon in the Role field.
The Responsibilities dialog box appears.
 - b** Click New.
The Add Responsibilities dialog box appears.
 - c** Select Registered Customer Site, and then click OK.
The role appears in the Responsibilities dialog box.
 - d** Click OK.
- 5** Complete the Login Name, Password, and Confirm Password fields, and then click Save.
The site user's information is added to the user record.

Adding Clinical Trial Subjects and Managing Subject Visits and Activities

Sites can enter information about clinical trial subjects. After the subject record is added, the subject visit template active for the site can be applied to set up a schedule of visits and activities for the subject.

Sites users perform the following tasks to add clinical trial subjects and manage their visits and activities:

- Add subjects to protocols.
- Screen and rescreen subjects to generate subject visits and activities.
- Enroll subjects.
- Mark subject activities completed.
- View subject calendars.
- Monitor subject status and enrollment rates.

Adding a Subject

Sites add subjects to protocols using the Subjects tab under the Protocols list on the eTrials page.

To add a subject

- 1** Click the eTrials tab.

The Protocols list appears.

- 2** Select the protocol for which you want to add information.

- 3** Click the Subjects tab under the Protocols list.

The Subjects list appears.

- 4** Add a new record to the Subjects list.

The Subjects form appears.

- 5 Fill in the following fields, and then click Save.

Field	Comments
Subject Initials	Required.
Date of Birth	Required.
Randomization Id	Optional. An ID number for the subject, which can be used in studies where both an enrollment ID and a randomization ID are required.

The subject's information appears in the Subjects list.

Generating Subject Visits and Activities

Site users screen subjects to generate subject visits and activities.

To screen a subject

- 1 In the Subjects list on the eTrials page, select a subject, and then click Screen.

The Screen dialog box appears.

- 2 Enter the screen date, and then click OK.

All screening visits and activities to take place in those visits appear in the Visits and Activities lists under the Subjects list.

- 3 Edit subject visit dates if desired.

- 4 Add or modify subject visits or activities if desired.

NOTE: A subject can be screened only once. After screening visits have been generated, clicking the Screen button again and changing the screen date reschedules the screening visits according to the new screen date.

A subject who initially fails screening can be rescreened. The rescreen date must be the same as or later than the screen date, and rescreening cannot happen if the subject has not already been screened (that is, if the screen date is null).

To rescreen a subject

- 1 Select a subject in the Subjects list who has already been screened.
- 2 Click Rescreen, and then enter a rescreen date.

The rescreen visits and activities are automatically added to the subject's schedule.

- 3 Edit subject visit dates if desired.
- 4 Add or modify subject visits or activities if desired.

NOTE: A subject can be rescreened more than once. Each time the Rescreen button is clicked and the rescreen date entered, a new set of rescreening visits and activities is generated and appended to the existing ones. This regeneration occurs even if the subject visit template has not been changed.

Enrolling Subjects

A subject who has successfully passed screening or rescreening is then enrolled in the study.

NOTE: Enrollment activities cannot be generated without an informed consent date for the active version of the protocol.

To enroll a subject

- 1 In the Subjects list on the eTrials page, select the subject.
- 2 Click Apply Active Version.

This creates new records in the informed consent field for all subjects in this site except those whose status is Early Terminated or Completed.

- 3 Click the icon in the Informed Consent Dates field of the subject's record.

The Informed Consent dialog box appears.

4 Click New.

The Add Informed Consent dialog box appears, showing the active version at the site.

5 Click Add.

The active version at the site appears in the Informed Consent dialog box.

6 Enter an informed consent date, and then click OK.**7** Click Enroll.

The Enrollment dialog box appears.

8 Enter the enrollment date and enrollment ID, and then click OK.**9** Modify subject visit dates and activities if desired.

Marking Subject Activities Completed

Site users mark subject activities completed using the Visits and Activities lists under the Subjects list on the eTrials page.

To mark subject activities completed**1** In the Subjects list, select the subject whose activities have just been completed.**2** Click the Visits tab under the Subjects list.**3** In the Visits list, select the visit that has just been completed.**4** In the Activities list under the Visits list, click Check All.

This marks all activities as completed:

- The Completed flag is selected.
- The Completed Date is set to the due date.
- The Status is set to Done.

5 If necessary, edit activity fields.

Viewing Subject Calendars

Site users view subject calendars using the Calendar tab under the Subjects list on the eTrials page.

To view a subject's calendar

- 1** In the Subjects list, select a subject.
- 2** Click the Calendar tab under the Subjects list.

The subject's calendar for the current month appears.

NOTE: Site users can view visits for all subjects during a particular day, week, or month on the Calendar page.

Monitoring Subject Status and Enrollment Rates

You can view charts of the following in your Siebel Life Sciences employee application:

- Subjects by status
- Enrollment rates

These charts can be displayed by protocol, region, or site. Charts can be displayed in a variety of formats.

To create graphical charts

- 1** Navigate to Protocols, Regions, or Site Management.
- 2** In the list that appears, select the record for which you want to create the charts.
- 3** Click the Charts tab under the list.
- 4** To create and display a subjects-by-status chart:
 - a** From the Show drop-down menu, select Subject Accruals.
 - b** From the second drop-down menu, select Subject Status Analysis.
- 5** To create and display an enrollment rate chart:
 - a** From the Show drop-down menu, select Subject Enrollment.
 - b** From the second drop-down menu, select Subject Enrollment Analysis.

Displaying Product Literature

Product literature can be displayed on the eDetails and Product Info pages. Site users do the following to view product literature:

- Click the eDetails or Product Info tab to display product markets.
- Click a product market to display related products.
- Click a related product to display a list of literature associated with that product.

Use the following steps to display product information:

- Create product markets.
- Associate related products with product markets.
- Associate literature with related products.
- Choose the Web page to display the literature.

Creating Product Markets

Products for which you want to display information must have their type set to Market in the Product Administration screen. This type of product is called a product market.

For more information on creating products, see *Siebel Life Sciences Guide* and *Product Administration Guide*.

To create a product market

- 1 Navigate to Product Administration.

The Products list appears.

- 2 Add a new record, such as Anti-Hypertensive Market.
- 3 Click in the Type field, and then choose Market from the drop-down menu.
- 4 Fill in other fields, such as Part Number and Description.

Associating Related Products with Product Markets

Related products are associated with product markets in the Related Products view under the Product Administration screen. Products that are associated with product markets usually have their types set to Detail.

NOTE: You can also associate a product with a product market by entering the name of the product market in the Parent field of the related product's record in the Products list.

To associate products with product markets

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Select a product market.
- 3** Choose Related Products from the Show menu below the More Info tab.
The Related Products list appears.
- 4** Add a new record to the Related Products list.
The Add Internal Products dialog box appears.
- 5** Select the products you want to associate with the product market, and then click OK.
The products appear in the Related Products list.
- 6** Set the Relation field for each related product to Parent.

Associating Literature with Related Products

You associate literature with products in the Product Literature list under the Product Administration screen. This literature will be displayed on the Product Info page.

To associate literature with related products

- 1** Navigate to Product Administration.

The Products list appears.

- 2** Select a product that you have associated with a product market.

- 3** Choose Product Literature from the Show menu below the More Info tab.

The Product Literature list appears.

- 4** Add a new record.

The Add Literature dialog box appears.

- 5** Select the literature to associate with the product market, and then click the Add icon.

The literature items appear in the Product Literature list.

Choosing the Web Page to Display Literature

You choose the Site Portal page for displaying product literature by using the Literature Type field of the Literature list under the Document Administration screen:

- **eDetails page.** To display literature on the eDetails page, select eDetail as the literature type.
- **Product Info page.** To display literature on the Product Info page, select Training Literature as the literature type.

To choose the Web page to display literature

- 1** Navigate to Document Administration > Literature.

The Literature list appears.

- 2** Select a literature item that you have associated with a product or disease state.
- 3** Click in the Literature Type field, and then choose the appropriate literature type, eDetail or Training Literature, from the drop-down menu.
- 4** In the form under the More Info tab, select the Internal check box.

Making Solutions and FAQs Available

Solutions are answers to frequently asked questions (FAQs). Solutions are documented by service agents and call center administrators and are stored in the database. Agents and customers can frequently resolve service issues by searching this knowledge base of solutions.

You can associate a solution with related solutions and resolution documents through the Solutions Administration screen. In the Site Portal, you can also associate solutions with product complaints (see [“Managing Product Complaints” on page 75](#)). The owner of a service request can associate a solution with the service request. In the Site Portal, the service request is known as a medical request (see [“Managing Medical Requests” on page 77](#)).

A solution can be published internally or externally. Solutions published internally are accessible only by your employees. Solutions published externally are available to Site Portal users.

Making Solutions Available

Solutions are created and administered using the Solutions Administration screen.

For information on creating and administering solutions, FAQs, and resolution documents, see the section on solutions and service requests in *Applications Administration Guide*.

To make solutions available

- 1 Navigate to Solution Administration > Solutions.

The Solutions list appears.

- 2 Select a solution to publish.
- 3 In the form below the Solutions list, select one of the following check boxes:
 - Publish Internal to make a solution available to your employees.
 - Publish External to make a solution available to your customers.

Viewing Solutions to Medical Requests

Site users can view available solutions on the Site Portal by clicking the Medical Requests tab.

To view solutions

- 1 Click the Medical Requests tab.

The Medical Requests page appears.

- 2 Click the link in the MR Number field of a medical request for more detail, such as solutions, attachments, and updates.

Assigning FAQs to Applications

FAQ documents are listings of common questions and answers on a particular topic. A frequently asked question is created by entering the question in the FAQ field of a solution record. Like all solutions, FAQs can be published internally or externally and are searchable. For FAQs and solutions to be available on your Web site, the Publish External flag must be set.

Users of each Siebel Life Sciences portal can see a different set of FAQs. Use the Permission Type field to assign a FAQ to a portal. The choices are:

- **All.** Consumer, Physician, and Site Portal users.
- **Professionals.** Physician Portal users.
- **Consumers.** Consumer Portal users.
- **Sites.** Site Portal users.

To make FAQs (solutions) available to specific users

- 1** Navigate to Solution Administration > Solutions.

The Solutions list appears.

- 2** Select the record of the FAQ you want to assign to a Siebel Life Sciences portal application.

- 3** From the drop-down menu in the Permission Type field, choose the users who can see the FAQ.

Site Portal users can see FAQs that have the permission type set to Sites or All.

NOTE: Leaving the Permission Type column blank allows the FAQ to show in all the applications.

Viewing FAQs

FAQs appear in the FAQ list on the home page and on the FAQ page of the Site Portal.

To view frequently asked questions

- Click a FAQ hyperlink to view the full question and its answer.

Managing Product Complaints

A product complaint is a health care professional's summary of information about a pharmaceutical product's undesirable or defective characteristics. All product complaints include a status, a product complaint number, an abstract, a date reported, and a date closed.

A professional submits a product complaint using the My Product Complaints list on the Product Complaints tab. The professional can check a product complaint's status by clicking the link on the complaint.

Product complaints are stored as change requests in the database. Product complaints can be viewed in the Siebel Life Sciences employee application by navigating to the Quality screen.

You can associate solutions with product complaints by navigating to Solution Administration > Solutions and clicking the Change Requests tab below the Solutions list.

Product complaints can be assigned manually to service agents, or an administrator can create assignment rules to automatically assign service requests to agents by criteria such as product expertise.

For more information on creating service request assignment rules, see *Siebel Assignment Manager Administration Guide*.

For more information on product complaints, see the section on change requests in *Siebel Life Sciences Guide*.

To submit a product complaint

- 1** Click the Product Complaints tab.

The Product Complaints page appears.

- 2** Click New.

The My Product Complaints form appears.

- 3** Provide an abstract about your complaint (and a description if you want).

- 4** Click the icon next to Product.

The Associated Products dialog box appears.

- 5** Click New.

The Add Internal Products dialog box appears.

- 6** Select a product, and then click OK.

- 7** Click OK in the Associated Products dialog box.

- 8** Click Save in the My Product Complaints dialog box.

The new complaint appears in the My Product Complaints list.

Managing Medical Requests

A medical request is a health care professional's request for information on products or disease states or general information. All medical information requests include a medical request number, a title, a description, and a status.

A registered user submits a new medical request by clicking New in the My Medical Requests list on the home page or Medical Requests page, and then completing and saving the Medical Requests form. The user can check a medical request's status by clicking the link on the request.

Medical requests are stored as service requests in the database. Service requests can be viewed in the Siebel Life Sciences employee application by navigating to the Service Requests screen.

Service requests can be assigned manually to service agents, or an administrator can create assignment rules to automatically assign service requests to agents by criteria such as product expertise.

For information on creating service request assignment rules, see *Siebel Assignment Manager Administration Guide*.

To submit a medical request

- 1** Click New in the My Medical Requests list.

The Medical Requests form appears.

- 2** Complete the form, and then click Save.

The new medical request appears in the Medical Requests list on the Medical Requests page.

The Siebel Life Sciences Consumer Portal provides consumers with pharmaceutical information over the Web.

When registered Consumer Portal users log in, they can click the tabs to see the following pages of the Consumer Portal:

- **Home Page.** A user can click hyperlinks to see information about products frequently asked questions, and how to contact the pharmaceutical company.
- **Disease State Info.** A user can obtain information on a particular disease state and a list of literature relating to the disease state by clicking on a hyperlink.
- **FAQ.** A user can view a list of previously asked questions.
- **Product Info.** A user can obtain a brief description of various pharmaceutical markets and associated products. By clicking on the pharmaceutical market hyperlink, the user can review product information and subsequently a list of product literature.
- **Administration.** A registered user, with delegated administrator responsibility, uses this page to create new registered Consumer Portal users and to edit login data for existing users. The Administration tab and page are visible to delegated administrators only.

Displaying Product Literature

Product literature can be displayed on the Product Info and Disease State Info pages. Consumers do the following to view product literature:

- Click a product market on the Product Info page to display related products, and then click a related product to display a list of literature associated with that product.
- Click a disease state on the Disease State Info page to display lists of literature and links associated with that disease state.

Use the following steps to display product and disease state information:

- Create product markets.
- Associate related products with product markets.
- Associate literature with related products.
- Associate literature with disease states.
- Choose the Web page to display the literature.

Creating Product Markets

Products for which you want to display information must have their type set to Market in the Product Administration screen. This type of product is called a product market.

For more information on creating products, see *Siebel Life Sciences Guide* and *Product Administration Guide*.

To create a product market

- 1 Navigate to Product Administration.
The Products list appears.
- 2 Add a new record, such as Anti-Hypertensive Market.
- 3 Click in the Type field, and then choose Market from the drop-down menu.
- 4 Fill in other fields, such as Part Number and Description.

Associating Related Products with Product Markets

Related products are associated with product markets in the Related Products view under the Product Administration screen. Products that are associated with product markets usually have their types set to Detail.

NOTE: You can also associate a product with a product market by entering the name of the product market in the Parent field of the related product's record in the Products list.

To associate products with product markets

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Select a product market.
- 3** Choose Related Products from the Show menu below the More Info tab.
The Related Products list appears.
- 4** Add a new record to the Related Products list.
The Add Internal Products dialog box appears.
- 5** Select the products you want to associate with the product market, and then click OK.
The products appear in the Related Products list.
- 6** Set the Relation field for each related product to Parent.

Associating Literature with Related Products

You associate literature with products in the Product Literature list under the Product Administration screen. This literature will be displayed on the Product Info page.

To associate literature with related products

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Select a product that you have associated with a product market.
- 3** Choose Product Literature from the Show menu below the More Info tab.
The Product Literature list appears.
- 4** Add a new record.
The Add Literature dialog box appears.
- 5** Select the literature to associate with the product market, and then click the Add icon.
The literature items appear in the Product Literature list.

Associating Literature with Disease States

Literature to be displayed on the Disease State Info screen is associated with product markets in the Product Detail Administration view.

To associate literature with product markets

- 1** Navigate to Product Administration.
The Products list appears.
- 2** Select a product market.
- 3** Choose Product Literature from the Show menu below the More Info tab.
The Product Literature list appears.

- 4 Add a new record.

The Add Literature dialog box appears.

- 5 Select the literature to associate with the product market, and then click the Add icon.

The literature items appear in the Product Literature list.

Choosing the Web Page to Display Literature

You choose the Consumer Portal page for displaying product literature by using the Literature Type field of the Literature list under the Document Administration screen:

- **Product Info.** To display literature on the Product Info page, select Training Literature as the literature type.
- **Disease State Info.** To display literature on the Disease State Info page, select Disease State as the literature type.

To choose the Web page to display literature

- 1 Navigate to Document Administration > Literature.

The Literature list appears.

- 2 Select a literature item that you have associated with a product or disease state.
- 3 Click in the Literature Type field, and then choose the appropriate literature type, Training Literature or Disease State, from the drop-down menu.
- 4 In the form under the More Info tab, select the Internal check box.

Making Solutions and FAQs Available

Solutions are answers to frequently asked questions (FAQs). Solutions are documented by service agents and call center administrators and are stored in the database. Agents and customers can frequently resolve service issues by searching this knowledge base of solutions.

You can associate a solution with related solutions and resolution documents through the Solutions Administration screen.

A solution can be published internally or externally. Solutions published internally are accessible only by your employees. Solutions published externally are available to Consumer Portal users.

Making Solutions Available

Solutions are created and administered using the Solutions Administration screen.

For information on creating and administering solutions, FAQs, and resolution documents, see the section on solutions and service requests in *Applications Administration Guide*.

To make solutions available

- 1** Navigate to Solution Administration > Solutions.

The Solutions list appears.

- 2** Select a solution to publish.

- 3** In the form below the Solutions list, select one of the following check boxes:

- Publish Internal to make a solution available to your employees.
- Publish External to make a solution available to your customers.

Assigning FAQs to Applications

FAQ documents are listings of common questions and answers on a particular topic. A frequently asked question is created by entering the question in the FAQ field of a solution record. Like all solutions, FAQs can be published internally or externally and are searchable. For FAQs and solutions to be available on your Web site, the Publish External flag must be set.

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The Solutions list appears.

- 2 Select the record of the FAQ you want to assign to a Siebel Life Sciences portal application.
- 3 From the drop-down menu in the Permission Type field, choose the users who can see the FAQ.

Consumer Portal users can see FAQs that have the permission type set to Consumers or All.

NOTE: Leaving the Permission Type column blank allows the FAQ to show in all the applications.

Viewing FAQs

FAQs appear in the FAQ list on the home page and on the FAQ page of the Consumer Portal.

To view frequently asked questions

- Click a FAQ hyperlink in the FAQ list on the home page or FAQ page to view the full question and its answer.

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