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GUIDE**

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Introduction

This guide describes the features and procedures that are specific to the Siebel Life Sciences applications (which consists of Siebel ePharma, Siebel eMedical, and Siebel eClinical). It should be used in combination with other books in the *Siebel Bookshelf* CD-ROM. However, the information in this book supersedes information about standard Siebel products provided in other documentation. In addition, some configuration information that is specific for Siebel Life Sciences is included in this guide.

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

Call Center Administrators	Persons responsible for setting up and maintaining a call center. Duties include designing and managing Computer Telephony Integration (CTI), SmartScripts, and message broadcasts.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
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.
Trainers	Persons responsible for training end users of the Siebel Life Sciences application.

How This Guide Is Organized

This book is divided into four parts.

The first part contains information that applies to the initial setup of Siebel Life Sciences.

The remaining chapters are divided into parts according to whether they describe functions of Siebel eClinical or of Siebel ePharma, or functions common to all Life Sciences applications.

The chapters in this guide are workflow-oriented. Each chapter guides you through an example workflow that illustrates the use of the important Siebel Life Sciences screens and views.

Configuration information related to the features described in the chapter is included at the ends of the chapters, as appropriate. General Siebel Life Sciences configuration information is provided in [Appendix A, “Information for Siebel Application Developers.”](#)

Revision History

Siebel Life Sciences Guide, Version 7.5, Rev. A

March 2003 Bookshelf

Table 1. Changes Made in Rev. A for March 2003 Bookshelf

Topic	Revision
“Importing Data with Siebel EIM” on page 412	<ul style="list-style-type: none"> ■ Replaced all information (text, figure, procedures, and table) with updated version. This information overlapped the information found previously in <i>Siebel Data Warehouse Installation and Administration Guide</i>. ■ Added text and new heading to introduce table previously included in <i>Siebel Data Warehouse Installation and Administration Guide</i>. ■ Merged information under two separate headings (both called “Data and Related Interface Tables”) into one heading.
“Loading Data into the Siebel Life Sciences Database” on page 421	Replaced all information with updated version previously included in <i>Siebel Data Warehouse Installation and Administration Guide</i> .
“Using SQL*Loader to Load the Data” on page 423	Replaced all information with updated version previously included in <i>Siebel Data Warehouse Installation and Administration Guide</i> .
“Troubleshooting Syndicated Data Loading” on page 432	Replaced all information with updated version previously included in <i>Siebel Data Warehouse Installation and Administration Guide</i> .

Introduction

Revision History

This chapter lists the applications administration tasks that are specific to Siebel Life Sciences. Use this chapter in combination with *Applications Administration Guide*, the main guide for performing administrative tasks.

Applications Administration Guide covers the setup tasks that are common to all Siebel eBusiness Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information you will need to implement, configure, and monitor the Sales, Service, and Marketing products and to perform Data Administration and Document Administration tasks.

Some tasks listed in this chapter might replace those in the administration guide whereas others might be additional tasks. Make sure you review [Table 2 on page 20](#) before following the procedures in *Applications Administration Guide*.

This guide assumes that you have already installed Siebel Life Sciences or completed an upgrade from another Siebel application. If you have not, refer to the Installation/Upgrade section of the *Siebel Bookshelf* and click the links to the guides that are relevant to your company's implementation.

The Siebel database server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For information about this process, see the *Siebel Server Installation Guide* for the operating system you are using, and *Siebel Server Administration Guide*.

CAUTION: Do not perform system administration functions on your local database. Although there is nothing to prevent you from doing this, it can have serious results, such as data conflicts, an overly large local database, or a large number of additional transactions to route.

Siebel Life Sciences Administrative Setup Procedures

Table 2 lists the administrative setup procedures that are specific to Siebel Life Sciences and procedures that might differ from those of the other Siebel eBusiness Applications. The table also directs you to documentation containing information about each task.

When setting up your application, use Table 2 in combination with the main resource, *Applications Administration Guide*.

Table 2. Siebel Life Sciences Administration Tasks

Administrative Task	Description	For More Information
Define sales territories	<ul style="list-style-type: none"> ■ Define sales territories and set up the territory assignment process 	<ul style="list-style-type: none"> ■ <i>Siebel Assignment Manager Administration Guide</i> ■ Chapter 3, “Managing Contacts”
Define medical specialties	<ul style="list-style-type: none"> ■ Defining medical specialties ■ Defining account specialties ■ Specifying a contacts’s primary specialty 	<ul style="list-style-type: none"> ■ Chapter 3, “Managing Contacts”
Set up bricks	<ul style="list-style-type: none"> ■ Defining bricks ■ Associating a brick with a contact address 	<ul style="list-style-type: none"> ■ Chapter 3, “Managing Contacts”
Define decision issues	<ul style="list-style-type: none"> ■ Defining decision issues 	<ul style="list-style-type: none"> ■ Chapter 3, “Managing Contacts” ■ Chapter 18, “Managing Products”

Table 2. Siebel Life Sciences Administration Tasks

Administrative Task	Description	For More Information
Managing Samples	<ul style="list-style-type: none"> ■ Establishing and reconciling initial master inventory ■ Transferring inventory to end users ■ Monitoring samples activities (disbursements, orders, transfers between employees, user inventory counts, and inventory adjustments) ■ Setting up and maintaining a home-office master inventory (optional) ■ Defining lot numbers (optional) ■ Managing electronic signatures ■ Identifying sample locations in the event of recalls ■ Determine the number of open (unreconciled) inventory periods allowed ■ Disabling samples tracking by lot number ■ Allowing sample product reconciliation without lot numbers (optional) 	<ul style="list-style-type: none"> ■ Chapter 6, “Managing Samples” ■ Appendix A, “Information for Siebel Application Developers”
Specifying a Competitor	<ul style="list-style-type: none"> ■ Deleting an account ■ Creating or identifying a competitor 	<ul style="list-style-type: none"> ■ Chapter 7, “Administering and Managing Accounts” ■ Chapter 3, “Managing Contacts” ■ Chapter 5, “Recording Calls”

Table 2. Siebel Life Sciences Administration Tasks

Administrative Task	Description	For More Information
Administer Smart Calls	<ul style="list-style-type: none"> ■ Creating a smart call template and making it available to end users 	<ul style="list-style-type: none"> ■ Chapter 8, “Creating Smart Calls” ■ Chapter 6, “Managing Samples”
Configuring Time Off Territory	<ul style="list-style-type: none"> ■ Configuring Time Off Territory approval process 	<ul style="list-style-type: none"> ■ Chapter 10, “Tracking Time Off Territory”
Administering MedEd	<ul style="list-style-type: none"> ■ Setting up funds for medical education plans and associating them ■ Creating MedEd master plans ■ Creating MedEd activity templates ■ Customizing the list of available drop-down values and adding literature items to the application ■ Designating contacts as medical education speakers 	<ul style="list-style-type: none"> ■ Chapter 11, “Managing MedEd Events” ■ <i>Interface Tables Reference for Siebel Industry Applications</i> ■ <i>Siebel Enterprise Integration Manager Administration Guide</i>
Creating a Clinical Program	<ul style="list-style-type: none"> ■ Adding a protocol ■ Setting up regions (Optional) ■ Defining a subject visit template ■ Revising protocols 	<ul style="list-style-type: none"> ■ Chapter 13, “Setting Up and Carrying Out a Clinical Trial” ■ Chapter 18, “Managing Products” ■ Chapter 14, “Managing Sites and Clinical Contacts”
Creating and Modifying a Site	<ul style="list-style-type: none"> ■ Setting site-level budgeting ■ Entering information for subjects ■ Setting up visits and activities for subjects ■ Creating activity plans 	<ul style="list-style-type: none"> ■ Chapter 14, “Managing Sites and Clinical Contacts”

Table 2. Siebel Life Sciences Administration Tasks

Administrative Task	Description	For More Information
Setting Up Standard Payments	<ul style="list-style-type: none"> ■ Standard payment amounts in subject visit template 	<ul style="list-style-type: none"> ■ Chapter 15, “Setting Up and Making Subject Activity Payments”
Creating Trip Report Templates	<ul style="list-style-type: none"> ■ Creating trip report templates 	<ul style="list-style-type: none"> ■ Chapter 16, “Administering and Using Clinical Trip Reports”
Setting up Microsoft Project Integration	<ul style="list-style-type: none"> ■ Setting up data exchange between Siebel eClinical Projects and Microsoft Project 	<ul style="list-style-type: none"> ■ Chapter 17, “Managing Clinical Projects”
Creating Project Templates	<ul style="list-style-type: none"> ■ Creating project templates 	<ul style="list-style-type: none"> ■ Chapter 17, “Managing Clinical Projects”
Importing Data	<ul style="list-style-type: none"> ■ Importing data with EIM ■ Importing, extracting, and routing syndicated data ■ Charting denormalized syndicated data 	<ul style="list-style-type: none"> ■ Chapter 19, “Importing Data” ■ Appendix A, “Information for Siebel Application Developers”

Table 2. Siebel Life Sciences Administration Tasks

Administrative Task	Description	For More Information
Administering products	<ul style="list-style-type: none">■ Adding an external product■ Adding an internal product or a market■ Making a product inactive■ Specifying additional product features■ Adding information on related products■ Associating related literature■ Adding product comparison information■ Adding a price list■ Associating a price list with a product■ Decision issues or product issues	<ul style="list-style-type: none">■ Chapter 18, “Managing Products”
Configuring Siebel Life Sciences	<ul style="list-style-type: none">■ Targeting■ New visit type■ Charting denormalized syndicated data■ Modifying business component user properties■ Configuring the Submit button■ Changing read-only status of fields■ MedEd special C + + classes	<ul style="list-style-type: none">■ Appendix A, “Information for Siebel Application Developers”

Understanding the My Team's Filter

The Show drop-down list is found on many screens. It provides a list of filters such as My Contacts, My Team's Contacts, and All Contacts. These filters determine what records appear in the view.

The behavior of the My Team's filter varies from screen to screen. In some screens, this filter displays those records where the *primary* member of the team reports to the user. In other screens, the filter displays records where *any* of the team members reports to the user.

This behavior is determined in the business component by the Manager List Mode user property. For more information on Manager List Mode user property, see *Siebel Tools Reference*.

If the Manager List Mode user property is active and set to Team, the My Team's filter displays all records where the user's subordinate is on the team but is not necessarily the primary member.

[Table 3](#) lists the default setting of the Manager List Mode user property for some Siebel Life Sciences screens and business components.

Table 3. The Default Setting for the Manager List Mode User Property

Screen	Business Component	Manager List Mode
Accounts	Accounts	Inactive
Contacts	Contact	Inactive
MedEd	Pharma ME Event Professional Invitee	Active
Objectives	Objective	Active
Protocols	Clinical Protocol	Active
Site Management	Clinical Protocol Site	Active

Using Assignment Manager in Siebel Life Sciences

Siebel Assignment Manager allows the Siebel Administrator to automatically assign tasks to specific people. To do this, however, the Siebel Administrator must first define assignment rules for each task. For more information on using and implementing Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*. This section provides Siebel Assignment Manager information that is specific to Siebel Life Sciences.

Predefined Assignment Objects

Some of the predefined assignment objects and underlying criteria described in *Siebel Assignment Manager Administration Guide* have been modified in Siebel Life Sciences to support pharmaceutical business processes. [Table 4 on page 27](#) describes the assignment objects that are changed in Siebel Life Sciences.

NOTE: Assignment Item Type Industry Name is not supported. This assignment rule is defined for Siebel eBusiness Applications and currently conflicts with Siebel Life Sciences assignment rules. Siebel Life Sciences uses the assignment item type Industry SIC Code.

Table 4. Assignment Objects Changes in Siebel Life Sciences

Assignment Object	Modifications
Account	<p>The assignment criteria SIC Code has been renamed Account Class of Trade.</p> <p>Its assignment criteria are:</p> <ul style="list-style-type: none"> ■ Account City State Country ■ Account Brick <p>Account Brick source table has been changed to S_CON_ADDR and source column has been changed to BRICK_ID.</p>
Contact	<p>This assignment object was created specifically for Siebel Life Sciences and is not described in <i>Siebel Assignment Manager Administration Guide</i>. Its assignment criteria are:</p> <ul style="list-style-type: none"> ■ Contact ■ Contact Medical Specialty Code ■ Contact Wildcard ■ Contact City ■ Contact State ■ Contact Country ■ Contact Zip Code ■ Contact City State Country ■ Contact Brick ■ Medical Specialty ■ Organization ■ Position

Contact Assignments in Siebel Life Sciences

In most Siebel eBusiness applications, assignment of contacts is based on primary address. This process is different for Siebel Life Sciences. A Siebel Life Sciences contact may have multiple addresses, and each representative on the contact's sales team may indicate a different primary address for the same contact. For this reason, do not base the assignment of contacts on the primary address.

For example, Representative A might indicate a hospital address as the primary address, while Representative B might indicate a private-office address as primary. In the All Contacts and My Team's Contacts views, the primary address that appears is the one assigned by the primary team member. For more information, see ["Predefined Assignment Objects" on page 26.](#)

Contact Denormalization Mode in Siebel Life Sciences

Contact Denormalization mode in Siebel Life Sciences differs from the description in *Siebel Assignment Manager Administration Guide* in the following ways:

- It denormalizes positions from the account team table to the contact team table for all contacts *directly* affiliated with an account. Users can specify a direct affiliation between a contact and an account by selecting:
 - The Direct field in the Contacts, Account Affiliations view tab
 - The Direct field in the Accounts, Contact Affiliations view tab

For more information, see ["Indicating an Affiliation Between an Account and a Contact" on page 200.](#)

- It does *not* denormalize positions from the opportunity team table to the contact team table.
- It must be run after running batch mode jobs for contacts and accounts separately. Run three separate batch mode jobs in this order:
 - Contacts
 - Accounts
 - Contact Denormalization

Contact Denormalization in Siebel Life Sciences has the following additional important rules, requirements, and exceptions:

- **Running Contact Denormalization mode in Dynamic mode.** To enable the Contact Denormalization Policy, set the expiration date to a future date or leave it blank. Then generate the database triggers by running Generate Triggers.

- **Running Contact Denormalization mode in Batch mode.** Remember to specify the parameters:

```
Object Name = Contact Denormalization  
Assignment Mode = Denorm
```

- **Contact Denormalization mode does not evaluate rules.** Therefore, it is not necessary to create a Contact Denormalization rule-based object to run Assignment Manager in this mode. Also, since it does not evaluate rules, Contact Denormalization mode does not set the primary team position.
- **Contact Denormalization assigns contacts to employees who are on the Account Team for which the contacts are directly affiliated.** In order to reduce the number of contact-to-position relationship (S_POSTN_CON) rows routed to the manager's local database, the value of the ASGN_DNRM_FLG field is set to “N”. With this default setting, the contacts that team members have been assigned by the Contact Denormalization process will not be visible to managers on their local databases. However, if the desired behavior is for managers to see all contacts that are assigned to their team members, regardless the assignment method, set the ASGN_DNRM_ “Y”.

For more information, see [“Charting Denormalized Syndicated Data” on page 446](#).

Setting Up Mobile Web Clients for Position Rollup

In Siebel eClinical, a clinical research associate (CRA) can create sites and assign employees to positions at the site level. When the CRA clicks the position rollup button, these positions become visible at the region and protocol levels. Typically, the CRA works in a disconnected mode, on a laptop computer.

The administrator must set up each mobile Web client to enable position rollups. The setup requires the following steps in Siebel eClinical:

- The administrator exports workflow processes and data maps from the server database to XML files.
- The administrator connects to a local client, imports the XML files to the client database and activates the workflow processes on the local client.

NOTE: Users of the local client must have Workflow Process Definition, EAI DATA Map View, and EAI Data Map Editor in their user responsibilities to accept imported workflow processes and data maps.

To export workflow processes from the server database to an XML file

- 1** In Siebel eClinical, connect to the server database.
- 2** From the application level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 3** In the Workflow Processes list, query for Clinical Assign*.

The query returns two records, Clinical Assign Position From Region and Clinical Assign Position From Site.
- 4** Select one of these records and select Import Workflow from the drop-down menu.
- 5** In the dialog box, select Save to Disk, select a location, and save the XML file with a unique name.
- 6** Repeat [Step 4](#) and [Step 5](#) for the second record.

To export DTE data maps from the server database to an XML file

- 1 In Siebel eClinical, connect to the server database.
- 2 From the application level menu, choose View > Site Map > Integration Administration > Data Maps.
- 3 In the Integration Object Map list, query for Clinical*.

The query returns four records—Clinical Region Position to Protocol Position Map, Clinical Site Position to Account Position Map, Clinical Site Position to Protocol Position Map, and Clinical Site Position to Region Position Map.
- 4 In the drop-down menu, select Export Data Map.
- 5 In the dialog box, check Export All Rows in Current Query and click Export.
- 6 In the dialog box, select Save to Disk, select a location, and save the data maps as PositionRollupDataMap.xml.

To import workflow processes to a local client from an XML file

- 1 In Siebel eClinical, connect to the local client.
- 2 From the application level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 3 In the Workflow Processes list, select Import Workflow in the drop-down menu.
- 4 In the dialog box, select Browse and find the workflow XML files created in the first procedure in this section, [“To export workflow processes from the server database to an XML file” on page 30](#).
- 5 Import one of the XML files.
- 6 Repeat [Step 4](#) and [Step 5](#) to import the second XML file.
- 7 In the Workflow Processes list, query for Clinical Assign*.

The query returns two records, Clinical Assign Position From Region and Clinical Assign Position From Site, both with a status of In Progress.
- 8 Select both records and click Activate.

The status of both records becomes Active.

To import DTE data maps to a local client from an XML file

- 1** In Siebel eClinical, connect to the local client.
- 2** From the application level menu, choose View > Site Map > Integration Administration > Data Maps.
- 3** In the Integration Object Map list, select Import Data Map from the drop-down menu.
- 4** In the dialog box, select Browse and find PositionRollupDataMap.xml created in the second procedure in this section, [“To export DTE data maps from the server database to an XML file” on page 31](#).
- 5** In the Integration Object Map list, query for Clinical*.

The query returns four records—Clinical Region Position to Protocol Position Map, Clinical Site Position to Account Position Map, Clinical Site Position to Protocol Position Map, and Clinical Site Position to Region Position Map.

Samples and Lot Numbers

The use of product samples for product promotion by pharmaceutical companies around the world is governed by local country legislations. Siebel Samples Management maintains a samples transaction record for every sample transfer, receipt, disbursement, order, and inventory adjustment.

The following three options are available to customers who are implementing Siebel Samples Management:

- 1 Use Lot numbers for samples creation, transfer, adjustment, order, disbursement, inventory, and reconciliation.

This option is the default setting. It is made possible with the system preferences settings shown on the following table.

System Preference	Value
Lots for Disperse Only	FALSE
Sample Lots Enabled	TRUE

NOTE: An administrator sets system preferences by navigating to the application-level menu > View > Site Map > Application Administration > System Preferences.

- 2 Use Lot numbers for samples creation, transfer, adjustment, order, disbursement, but do not use lot numbers for inventory and reconciliation.

This option is made possible with the system preferences settings shown on the following table.

System Preference	Value
Lots for Disperse Only	TRUE
Sample Lots Enabled	TRUE

In addition to these system preference changes, a Siebel administrator must use Siebel Tools to control product visibility associated with this behavior. For more information, see [Appendix A, “Information for Siebel Application Developers.”](#)

NOTE: The Lot# Tracking flag on the Product Administration screen must be checked.

- 3 Do not use lot numbers for samples management at all.

This option is made possible with the system preferences settings shown on the following table.

System Preference	Value
Lots for Disperse Only	FALSE
Sample Lots Enabled	FALSE

The Lot# Tracking flag on the Product Administration screen does not have to be checked.

Product Overview

2

The Siebel Life Sciences product comprises Siebel ePharma, Siebel eMedical, and Siebel eClinical. Siebel Life Sciences is the only integrated professional and investigator database that captures, tracks, and routes information to other parts of an organization, including the mobile sales force and customer service centers.

About Siebel ePharma

Siebel ePharma is a suite of eBusiness applications specifically designed for the pharmaceutical industry. Siebel Life Sciences provides industry's only integrated solution that allows information captured through multiple channels to be shared between sales and marketing, clinical affairs, customer services and other parts of an organization.

Siebel ePharma provides:

- Flexible contact management, supporting a wide range of contact types, both prescribers and nonprescribers, including physicians, pharmacists, nurses, office staff, and business administrators
- Account management, supporting a wide range of account types, such as hospitals, pharmacies, health maintenance organizations (HMOs), clinics, wholesalers, and group purchasing organizations (GPOs)
- Advanced, specific querying and list generation, allowing product promotion to targeted accounts and health care professionals
- Activity management, tightly integrated with the Siebel Calendar, promoting streamlined call planning and call reporting
- Medical education event planning, aiding efficient planning and preparation for many types of medical education events by tracking speakers, invitees, meeting-related activities, and expenses
- Smart Calls, which are call report templates supporting true one-button call reporting
- Comprehensive analysis charts, presenting sales and prescription (Rx) trends by postal code, brick (retail sales analysis territory), territory, plan, and prescriber
- Dedicated formulary-opportunity management, allowing focused product promotion and opportunity tracking
- Sales effectiveness tools and methodologies, including Target Account Sales (TAS), Miller Heiman, and Enterprise Selling Process (ESP), to shorten the sales cycles and increase account revenue and production

- Contract and pricing management, including contract creation, approval, execution, renewal, and contract-based pricing
- Enterprise-wide product information for employees, allowing consistent, accurate, and up-to-date information sharing across sales teams and sales forces
- Simplified sampling workflow for users and administrators, supporting shipments in or out, orders, inventory counts, adjustments, and reconciliation, as well as tracking by lot numbers
- Support for a full customer service center that handles medical inquiries, adverse events, and other related issues
- Handling of a large number of inbound telephone calls, faxes, email, and Internet correspondence for customer service, sales, and medical support
- Support for outbound calling for telesales, telemarketing, and meeting planning

About Siebel eMedical

Siebel eMedical is a suite of eBusiness applications designed specifically for the medical products industry to increase revenue and profitability through strategic customer-partner relationship management, enhanced customer and partner productivity and reduced cost of process inefficiencies.

Siebel eMedical provides:

- Flexible contact management, supporting a wide range of contact types, including physicians, nurses, technicians, office staff, and business administrators
- Account management, supporting a wide range of account types, such as hospitals, health maintenance organizations (HMOs), clinics, wholesalers, and group purchasing organizations (GPOs)
- Advanced, specific querying and list generation, allowing product promotion to targeted accounts and health care professionals
- Activity management, integrated with the Siebel Calendar, promoting streamlined customer support and service

- Medical education event planning, aiding planning and preparation for many types of medical education events by tracking speakers, invitees, meeting related activities, and expenses
- Comprehensive analysis charts, presenting sales and product usage trend by account, postal code, territory, and plan
- Opportunity management, allowing focused product promotion and opportunity tracking
- Enterprise-wide product information for employees, allowing consistent, accurate, and up-to-date information sharing across sales teams, customer support, and field service
- Simplified workflow to manage assets at customer site, supporting shipments in or out, orders, inventory counts, adjustments and reconciliation
- Support for customer service centers that handle medical inquiries, service requests, and other related issues
- Handling of a large number of inbound telephone calls, faxes, email, and Internet correspondence for customer service, sales, and medical support
- Support for outbound calling for telesales, telemarketing, and meeting planning
- Modeling of products and services that incorporates internal expertise, allowing sales representatives to configure and quote error-free customer solutions
- Field-service functions that provide service center agents, warehouse staff, and field service engineers the tools to respond to service requests
- Functionality to receive service calls, verify service agreements and entitlements, enter a service request, search for solutions, create activities for a service request, and assign and dispatch field service engineers
- Detailed customer configuration, management of trunk inventory, tracking of parts consumption and logistics, management of inventory replenishment, and integration of return materials authorizations and service orders
- Service details, including the required skills, tools, and parts for service activities
- Management of preventive maintenance plans, and repair of defective parts

- Tracking and analysis of service costs, preparation of invoices for service, and tracking of payments
- Definition of asset characteristics and recording of readings from medical equipment (assets) in the field for preventive maintenance, billing, and service
- Audit trail of activities
- Single application to manage partner interactions through the entire partner life cycle, from recruitment, registration, profiling, certification, joint planning, and execution through measurement and analysis of partner performance
- Sharing of opportunities, service requests, accounts, solutions, and other business information with partners in the same way as with employees
- Processes and tools to work collaboratively with partners to develop plans to meet strategic goals; helps analyze partnership effectiveness, forecast revenue, manage market development funds, and analyze partner performance

About Siebel eClinical

Siebel eClinical allows pharmaceutical companies, biotechnology companies, and contract research organizations (CROs) to better manage the clinical trial process, maintain quality of clinical trials, and manage investigator relationships. It provides a comprehensive set of tools for clinical research associates (CRAs), clinical investigators, and site coordinators, including a personalized Internet portal to conduct study activities more efficiently.

Siebel eClinical includes:

- Personalized Internet portal to help site coordinators, clinical investigators, and CRAs better manage clinical trials over the Web
- Support for full clinical trial hierarchies of Subject-Site-Region-Protocol-Program
- Support for global trials running in multiple countries, multiple languages, and multiple currencies.
- Site management tools for CRAs, including trip reports, document tracking, and payment generation
- Investigator and site profiling

- Activity and calendar management for CRAs and study sites
- Clinical trial status and management reports for study manager and clinical research associates
- Integrated payment tracking for sites and investigators
- Visit templates for study staff to better plan subject visits and promote protocol adherence
- Trip report templates for CRAs to facilitate compliance with Good Clinical Practice (GCP)
- Project and resource management integrated with Microsoft Project
- A flexible audit trail engine

Siebel eClinical was designed to allow pharmaceutical and biotech companies, clinical research organizations, and other clinical trial sponsors to:

- Deploy a Web-based clinical trial management system to internal and external users
- Make better decisions throughout the clinical trials process, leading to more efficient use of resources and faster time to market
- Increase productivity of CRAs and their managers by automating repetitive tasks and allowing real-time information sharing
- Create sustainable competitive advantage by allowing customers to provide breakthrough service to sites and investigators
- Provide a solution integrated with Siebel ePharma Sales and Siebel ePharma Service to allow customers to deploy one customer management system across the entire enterprise

Product Modules and Options

Many Siebel eBusiness Applications modules can be purchased and used with Siebel Life Sciences. In addition, optional modules specific to Siebel Life Sciences can be purchased to provide enhanced functionality for various business processes.

For information on the optional modules that can be used with Siebel Life Sciences, contact your Siebel sales representative.

NOTE: This guide documents Siebel Life Sciences with the optional modules installed. In addition, the Sample database includes data for optional modules. If your installation does not include some of these modules, your software interface will differ from that described in some sections of this guide.

The exact configuration of Siebel Life Sciences screens and views depends on your company's configuration of the application. For introductory information on using the Siebel Life Sciences interface, see *Fundamentals, Online Help*, and [Chapter 1, "Getting Started."](#)

Business Functions of Screen Tabs in Siebel Life Sciences

The Siebel Life Sciences interface provides various task-specific screens and views for administrative and end-user functions.

NOTE: Most administrative tasks are performed from administration screens that are accessed from the Site Map. You cannot access these from the screen tabs.

[Table 5](#) lists the most frequently used Siebel Life Sciences screens and the functions of the views in those screens. The screens listed here appear on the screen tabs.

Table 5. Siebel Life Sciences Screens

Screen Tab	Functions	For More Information
Accounts	Manage information about accounts (such as hospitals, HMOs, clinics, wholesalers, GPOs, and pharmacies) and affiliate accounts, contacts, and other information about a particular account.	Chapter 7, “Administering and Managing Accounts,” in this guide
Activities	Manage activities with contacts and accounts, and create contact and account calls (with or without Smart Calls).	Chapter 4, “Planning Calls,” in this guide and <i>Siebel Call Center User Guide</i>
Agreements	Manage information about agreements, administrative contracts, and entitlements.	<i>Siebel Field Service Guide, Siebel Sales User Guide</i>
Analysis	Display prescriber, account, plan, payer, and territory-level sales and Rx data.	Chapter 9, “Using Analysis,” in this guide
Assets	Manage information about products sold to accounts.	<i>Siebel Field Service Guide</i>
Calendar	Create and display activities (including to-do activities) and share calendar information with coworkers.	Chapter 4, “Planning Calls,” in this guide and <i>Fundamentals</i>
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	<i>Siebel Marketing Guide, Siebel Sales User Guide, Siebel Call Center User Guide</i>

Table 5. Siebel Life Sciences Screens

Screen Tab	Functions	For More Information
Clinical Programs	Manage information about clinical trial programs.	Chapter 13, “Setting Up and Carrying Out a Clinical Trial,” in this guide
Contacts	Manage information about health care professionals (such as formulary directors, hospital administrators, pharmacists, and physicians) and their affiliations with other contacts and accounts.	Chapter 3, “Managing Contacts,” in this guide
Document Tracking	Track documents at multiple levels (Site, Region, or Protocol) for multiple entities (Contact or Account)	In this guide: <ul style="list-style-type: none"> ■ Chapter 13, “Setting Up and Carrying Out a Clinical Trial” ■ Chapter 14, “Managing Sites and Clinical Contacts” ■ Chapter 7, “Administering and Managing Accounts” ■ Chapter 3, “Managing Contacts”
Home	This is the first screen you see when you log in to the Siebel Life Sciences application. It is a centralized screen that summarizes contacts, accounts, and activities.	<i>Fundamentals</i>
Literature	Display company- and industry-related literature cataloged by the Siebel administrator.	<i>Siebel Sales User Guide</i>
MedEd	Manage medical education events.	Chapter 11, “Managing MedEd Events,” in this guide
Objectives	Define objectives for contacts and accounts and monitor progress made toward meeting goals.	Chapter 12, “Objectives,” in this guide
Opportunities	Manage formulary opportunities and affiliate contacts, accounts, and other information with a particular opportunity.	<i>Siebel Sales User Guide</i>
Orders	Manage information about samples ordered by physicians through your company’s Web site, as well as all goods and service orders recorded by the service organization.	<i>Siebel Order Management Guide</i>

Table 5. Siebel Life Sciences Screens

Screen Tab	Functions	For More Information
Payments	Keep track of payments pertaining to clinical trial activities at sites.	Chapter 15, “Setting Up and Making Subject Activity Payments,” in this guide
Products	Display current product information, including key features and product trends.	Chapter 18, “Managing Products,” in this guide
Protocols	Maintain information about clinical trial protocols.	Chapter 13, “Setting Up and Carrying Out a Clinical Trial,” in this guide
Quotes	Automatically generate quotes tailored to meet customer requirements.	<i>Product Administration Guide</i> and <i>Siebel Sales User Guide</i>
Regions	Manage region or country level information about clinical trial protocols.	Chapter 13, “Setting Up and Carrying Out a Clinical Trial,” in this guide
Routes	Create routes to schedule regular visits to groups of accounts.	Chapter 4, “Planning Calls,” in this guide
Samples	Organize phases of samples workflow: shipments, orders, adjustments, inventory counts, and reconciliation.	Chapter 6, “Managing Samples,” in this guide
Service Requests	Manage requests for medical or product information and related activities and attachments.	<i>Siebel Field Service Guide</i>
Site Management	Manage information about a particular clinical trial site, including associated contacts, subjects, activities, payments, and site visits.	Chapter 14, “Managing Sites and Clinical Contacts,” in this guide
SmartScripts	Define the application workflow for an interactive situation in a script. These interactive situations could include inbound communications (such as customer service) and outbound contacts (such as telemarketing).	<i>Siebel SmartScript Administration Guide</i>
Smart Calls	Create and edit Smart Call templates that are applied in the Contact Call Detail and Account Call Detail views.	Chapter 8, “Creating Smart Calls,” in this guide
Solutions	Enter and display resolutions successfully used for reported problems.	<i>Siebel Field Service Guide, Siebel Call Center User Guide</i>

Table 5. Siebel Life Sciences Screens

Screen Tab	Functions	For More Information
Subjects	Manage information about clinical trial subjects.	Chapter 13, "Setting Up and Carrying Out a Clinical Trial," in this guide
Targeting	Perform queries on profile information (such as best times to call and market ranking), as well as sales and Rx data, in order to generate target lists of contacts or accounts.	Chapter 4, "Planning Calls," in this guide
Time Off Territory	Manage information about time when sales representatives and field personnel are out of their territories, not working on activities directly associated with accounts, contacts, or opportunities.	Chapter 10, "Tracking Time Off Territory," in this guide

Product Overview

Business Functions of Screen Tabs in Siebel Life Sciences

In Siebel Life Sciences a *contact* is typically a physician, nurse, or pharmacist or other medical professional. In a more general sense, a contact can be any individual a pharmaceutical company deems significant to their business process including a formulary director, contracts administrator, or medical education event speaker.

This chapter describes how to manage Siebel Life Sciences contact information. Using the procedures given in this chapter, you will be able to perform the administrator tasks of defining and specifying medical specialties, deleting a contact, defining bricks, and associating contacts to a brick. End users such as sales representatives and managed care account managers can use the Contacts view to create and track a variety of contact information, including contact affiliations, contact and account relationships, contact assessments, and the best times to call on a contact.

For more information on the differences between administrator and end-user tasks, see [“Business Scenario for Managing Contacts” on page 48](#).

Business Scenario for Managing Contacts

This section outlines an example workflow performed by a Siebel administrator and end users. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company is reviewing the contact information in their database to make sure it is as current and up-to-date as possible. During this update process, the administrator deletes obsolete contacts and associates new contacts with existing bricks (geographic areas). In addition, he adds new medical specialties and updates existing contacts needing a primary specialty designation.

Sales representatives use Siebel Contacts to manually add and modify contact information. They can add more depth to contact data by creating user-defined fields called categories. Using categories, representatives can track private or shared information about a contact. In addition, representatives can track referral relationships between contacts.

Example Workflow for Managing Contacts

This section details sample tasks often performed by administrators and end-users when managing contacts. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to manage contacts:

- **Define medical specialties within the system and specify a contact's primary specialty.** For more information, see [“Defining a Specialty” on page 51](#).
- **Delete contacts.** For more information, see [“Deleting a Contact” on page 52](#).
- **Define new bricks.** For more information, see [“Defining a Brick” on page 53](#).
- **Associate a contact with a brick.** For more information, see [“Associating a Contact with a Brick” on page 55](#).

End-User Procedures

The following list shows tasks end users typically perform when managing contacts:

- **Add a contact.** For more information, see [“Adding a Contact” on page 58](#).
- **Add contact category information.** For more information, see [“Adding Category Information” on page 60](#).
- **Specify the best times to make contact calls.** For more information, see [“Specifying the Best Time to Call Based on Address” on page 61](#).
- **Indicate affiliations between a contact and an account.** For more information, see [“Indicating Affiliations Between a Contact and an Account” on page 64](#).
- **Indicate affiliation between contacts.** For more information, see [“Indicating Affiliations Between Contacts” on page 63](#).
- **Create contact assessments.** For more information, see [“Creating a Contact Assessment” on page 66](#).

Managing Contacts

Example Workflow for Managing Contacts

- **View pre-call summary information about a contact.** For more information, see [“Viewing Pre-call Information” on page 67](#).
- **Track documentation associated with a contact.** For more information, see [“Tracking Documentation Associated with a Contact” on page 69](#).

Administrator Procedures

The following administrator procedures are described in this section:

- [To define a specialty on page 52](#)
- [To specify a contact's primary specialty on page 52](#)
- [To delete a contact on page 53](#)
- [To define a brick on page 54](#)
- [To associate a contact with a brick on page 55](#)

Primary Specialty and Unique Identifiers

As a Siebel administrator, you are responsible for entering the following contact information:

- **Primary Specialty.** The Primary Specialty field is read-only for end users and can be edited only from the Data Administration, Contact form. For more information, see [“Defining a Specialty” on page 51](#).
- **Company Identifier.** Use the Company Identifier field on the Data Administration, Contact form to enter a unique contact identifier that your company uses as a unique identifier for contacts.
- **License.** Use the License number field on the Data Administration Contact form to enter a contact's professional license numbers (such as an authorized state license number).

Defining a Specialty

The Siebel administrator defines medical specialties within Siebel Life Sciences using the Applications Administration, Specialty view.

NOTE: Please note that the Primary Specialty field is different from the Rep Specialty field on the Contacts screen. To add additional values to the Rep Specialty drop-down list, follow the procedures on modifying a list of values in *Applications Administration Guide*.

To define a specialty

- 1 From the application-level menu, choose View > Site Map > Application Administration > Specialty.

The Primary Specialty view appears.

- 2 In the Primary Specialty list, add a record and complete the necessary fields.

The Primary Specialty field is read-only for end users and can be edited only from the Data Administration, Contacts view. To specify a contact's primary specialty, see the next procedure.

To specify a contact's primary specialty

- 1 From the application-level menu, choose View > Site Map > Data Administration > Contacts.
- 2 In the Contacts list, select the contact for whom you wish to specify a primary specialty.
- 3 In the Contacts form, select a specialty in the Primary Specialty field.

NOTE: On initial data load, you can use EIM to load

Primary Specialty data into the base table S_MED_SPEC. For more information on using EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

Merging Contact Records

If you find that two or more contact records contain the same information, you should merge the records into one in order to keep the database accurate. For more information on merging records, see *Fundamentals*.

Deleting a Contact

Deleting a contact completely removes the contact from the system. Be aware that deleting a contact could have undesired consequences.

As an alternative to deleting a contact, consider making the Siebel administrator the primary team member so that he or she can remove all other employees from the account's team.

NOTE: If a Contact record is deleted from the Data Administration, Contacts view, any records for that contact in the Signature Audit Administration view display with blank Last Name, First Name, and Reference # fields. To avoid this problem, you may want to enforce a business rule that prevents the delete record function from operating in the Data Administration, Contacts view.

If you are certain that the contact is no longer active, use the following procedure to delete it.

To delete a contact

- 1** From the application-level menu, choose View > Site Map > Data Administration > Contacts.

The Contact Administration view appears.

- 2** In the Contacts list, select and then delete the appropriate contact.

The contact is deleted from the list.

Defining a Brick

A brick is a collection of accounts and contacts, normally in a common geographic area. The primary purpose of a brick is to allow a company to publish RSA (retail sales analysis) data while making sure that specific sales cannot be tracked to a particular contact or account.

IMS Health publishes retail sales data and determines the definition of bricks. Brick definitions are reviewed every six months and adjusted to make sure that the brick is as small as possible while providing the required level of anonymity.

Because brick data is a key measure of return on a pharmaceutical company's investment in sales promotion, outside the United States most pharmaceutical companies build sales territories based on brick data available for that country. This provides a meaningful way to measure performance over time.

How Bricks Work in Siebel ePharma

In Siebel Life Sciences, administrator can associate a contact or an account address with a brick. A contact can be associated with multiple bricks and an account with multiple addresses can have one brick for each address.

This implementation of Siebel ePharma also supports “mini-bricks.” A mini-brick data is a subset of brick data that narrows the number of contacts and accounts in a geographic area. Mini-bricks provide a more detailed view of an area, without identifying the individuals in the unit.

It is the Siebel administrator’s responsibility to set up and maintain brick definitions as well as associate bricks with account addresses and contacts. For more information on associating a brick with a specific contact, see [“Associating a Contact with a Brick” on page 55](#). For more information on associating a brick with an account address, see [“Generating Account Hierarchies” on page 188](#).

To define a brick

- 1 From the application-level menu, choose View > Site Map > Data Administration > Brick Details.

The Bricks view appears.

- 2 In the Bricks list, add a record and complete the necessary fields.

Some of the fields in a Brick record are described in the following table.

Field	Comments
Name	The name for the brick being defined.
Parent Brick	The Pick Brick dialog box lists all the bricks in the database. If the new brick is a mini-brick, click the parent brick in the Pick Brick dialog box.
Active	If checked, the brick is active. Only active bricks are listed in the Pick Brick dialog box.
Position	<p>Defines positions associated with the brick and controls visibility on the Analysis screen > Brick views.</p> <p>Note: For users to see the Bricks for which they are responsible, the administrator must associate their position with those Bricks in the Data Administration screen > Brick Details.</p>

NOTE: On initial data load, you can use EIM to load brick data into the base table S_REGION. For more information on using EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

Associating a Contact with a Brick

You can associate a brick directly with one or more contacts.

NOTE: Before you can associate a brick with a contact, the brick must be defined. For more information, see [“To define a brick” on page 54](#).

To associate a contact with a brick

- 1 From the application-level menu, choose View > Site Map > Data Administration > Brick Details.
- 2 In the Bricks list, select a Brick.

- 3** In the Contacts list, click New.
The Add Contact dialog box appears.
- 4** Add a contact record by performing one of the following:
 - Click New and enter a new contact
 - Click Query to find an existing contact

Scores on Assessment Templates

The purpose of an assessment is to determine a single total score or a percentage that can be used to rank a contact. The total score for the assessment is determined by summing weighted scores for each assessment attribute. For more information on creating assessment templates, see [“Creating an Assessment Template” on page 327](#).

End-User Procedures

The following end-user procedures are described in this section:

- [To add a contact on page 59](#)
- [To add category information for a contact on page 61](#)
- [To specify the best time to call on a contact on page 62](#)
- [To indicate an affiliation between contacts on page 63](#)
- [To indicate an affiliation between a contact and an account on page 64](#)
- [To specify a role for an affiliated account on page 65](#)
- [To specify the best times to call on an affiliated account on page 66](#)
- [To create an assessment of a contact on page 66](#)
- [To view pre-call information on page 67](#)

Adding a Contact

A contact can be any individual an end user deems significant in achieving their business goals. Multiple employees can be assigned, as a team, to a contact. Any employee assigned to the team can update the contact's information. A user who adds a contact is automatically designated as the *primary* contact team member. However, he or she can also be assigned to other contact teams by another user (such as a manager).

NOTE: Starting with Siebel Life Sciences version 7.0.3, the My Team's Contacts view is limited to showing only those contacts with a subordinate person as the *primary* on the team. It does not show contacts where the subordinate is on the team but is not primary. If you prefer the older behavior of displaying all contacts that are on the team of the subordinate person, please contact Siebel Technical Support.

Because the contacts shell is assigned to individual people (that is, employees) and not positions, this view does *not* show contacts that are assigned to a position that has no employee assigned. To prevent this behavior, assign a "placeholder" employee to every position.

Contacts can also be viewed on an account hierarchy tree that shows accounts, their child accounts and all activities, contacts, and opportunities associated with the accounts. For more information, see [Chapter 7, "Administering and Managing Accounts."](#)

Editing a Contact Address

Contacts in Siebel Life Sciences can have multiple addresses. Users can edit existing addresses directly in the Address field. However, users should be careful when editing an existing address. Editing an existing address changes it for all contacts currently associated with the address.

NOTE: If an address is associated with multiple contacts and you are unsure whether the change applies to all of them, create a new address.

To add a contact

- 1** Navigate to the Contacts screen.
- 2** From the Show drop-down list, select My Contacts.
- 3** In the Contacts More Info form, add a record and complete the necessary fields.

Some of the fields in the Contacts record are described in the following table.

Field	Comments
Address	<p>A contact can have multiple addresses. Use the Addresses dialog box to select an existing address or add a new one. Each user must specify one address as primary by selecting the Primary field. Each sales representative assigned to a contact can specify a different primary address.</p> <p>For example, one representative might specify a private office as the primary address, while another representative might specify a hospital department as the primary address. In the All Contacts view and the My Team's Contacts view, the primary address displayed is the one assigned by the primary team member.</p>
Brick	<p>Indicates an impartial geographic code that groups contacts in a way that mirrors the definition provided by syndicated data providers. These codes are loaded by the administrator and are read-only for all users.</p> <p>For more information, see “How Bricks Work in Siebel ePharma” on page 54, and “Associating a Contact with a Brick” on page 55.</p>
First Name	First name of the contact.
Last Call Date	The date of the most recent call that has been submitted for each member of the team.
Last Name	Last name of the contact.
License #	Used to record all contact licenses.
Primary Specialty	Only Siebel administrators can define this value. For more information, see “Primary Specialty and Unique Identifiers” on page 51 and “Defining a Specialty” on page 51 .

Field	Comments
Rep Specialty	The specialty or area of expertise the end user sees this contact has having within their organization. To add additional values to this drop-down list, follow the procedures on modifying a list of values in <i>Applications Administration Guide</i> .
Route	Allows users to select a when to visit an account from a predefined schedule. For more information, see “Defining a Route Plan” on page 87 .
Speaker	A check mark indicates this contact is a speaker for MedEd events. This field is used to track various speakers at any level. For more information, see “Designating MedEd Event Speakers” on page 256 .
Team	Multiple people can be assigned to the contact’s team. The team member who created the record is indicated as primary.
Type	Indicates the type of contact. The choices available in the drop-down list are configured using the CONTACT_TYPE in the List of Values.

NOTE: Contacts can only be deleted by a Siebel administrator in the Data Administration, Contacts view. For information on administering contacts, see [“Deleting a Contact” on page 52](#).

Adding Category Information

End users can create categories to track additional contact information, such as a particular sports a contact enjoys or food a contact prefers. In creating a category, a user can define possible category values and specify the relative importance of the category and each of its values. In addition, there are no restrictions on how many times a user can apply a specific category. Categories can be used as many times and with as many contacts as necessary.

By default, all categories are visible system-wide. However, users can mark categories as private. Private categories are only visible to the user who created them.

To add category information for a contact

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4 Click the Categories view tab.
- 5 In the Categories list, add a record and complete the necessary fields.

Some of the fields in the Categories record are described in the following table.

Field	Comments
Category	The type of this category. The Pick Category dialog box lists all the categories previously defined by you or others. Select an existing category or create a new one.
Category Rank	Optionally, enter a number to indicate the importance of this category relative to other categories.
Value	A specific category value, such as golf or sailing. The Category Values dialog box lists all the values previously defined for the category. Select an existing value or create a new one.
Value Rank	Optionally, enter a number to indicate the importance of this value relative to other values.
Private	Selecting this field prevents other users from seeing the category.

Specifying the Best Time to Call Based on Address

A contact can have more than one address. Using the Addresses view, end users can enter the best times to call on a contact based on a selected address. Entering information in this view automatically populates other views such as the PreCall view.

For more information on adding addresses, see the addresses field description in [“Adding a Contact” on page 58](#). For more information on using the PreCall view, see [“Viewing Pre-call Information” on page 67](#).

To specify the best time to call on a contact

- 1** Navigate to the Contacts screen.
- 2** From the Show drop-down list, select My Contacts.
- 3** In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4** Click the Addresses view tab.
- 5** In the Addresses list, select an address.
- 6** In the Best Times list, add a record and complete the necessary fields.

Indicating Affiliations Between Contacts

The Contacts Affiliations view allows end users to track referral relationships between contacts. Using this view, users can track:

- **Referral or Referring Relationship.** Users can specify whether a contact receives or gives referrals to other contacts.
- **Influence of Contacts on One Another.** Users can specify whether or not one contact influences another contact.

To indicate an affiliation between contacts

- 1** Navigate to the Contacts screen.
- 2** From the Show drop-down list, select My Contacts.
- 3** In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4** Click the Affiliations view tab.
- 5** In the Affiliations list, add a record.
The Add Contacts dialog box appears.
- 6** Select one or more contacts and click OK.
The selected contacts are added to the Affiliations list.
- 7** In the Affiliations list, select a value for the Relationship field; the default value is None Specified.
- 8** To specify one contact's influence over another:
 - a** In the Affiliations list, select a contact.
 - b** In the Influenced list, add a record.
The Add Contacts dialog box appears.

- c** Select one or more contacts and click OK.

The selected contacts are added to the Influenced list.

- 9** In the Influenced list, specify the contact relationship by making a selection in the Relationship field.

Indicating Affiliations Between a Contact and an Account

Using the Account Affiliations view tab, end users can associate a contact with an account. One reason to indicate these affiliations is for greater efficiency in call reporting, as described in [Chapter 5, “Recording Calls.”](#)

Once you record an affiliation between an account and a contact, you can also:

- **Specify a role for the affiliated contact.** For more information, see [“To specify a role for an affiliated account” on page 65.](#)
- **Specify the best times to call the contact at the affiliated account.** For more information, see [“To specify the best times to call on an affiliated account” on page 66.](#)

The Account Affiliations view also shows the formulary status of products in the affiliated account as read-only information. Formulary status can be updated from the Account Plan Formulary view.

To indicate an affiliation between a contact and an account

- 1** Navigate to the Contacts screen.
- 2** From the Show drop-down list, select My Contacts.
- 3** In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4** Click the Account Affiliations view tab.

- 5 In the Account Affiliations list, add a record and complete the necessary fields.

Some of the fields in the Account Affiliation record are described in the following table.

Field	Comments
Direct	Select this field to route profile data for the contact to the members of the team assigned to the <i>affiliated account</i> . The Siebel administrator must enable this behavior. For more information, see “Modifying the Routing of Affiliated Contact Data” on page 71 . Do not select this field to route the profile data for the contact to the members of the team assigned to the contact. (Users who are connected to the server see the profile data whether or not a check mark appears in the field.)
Account	The account to be affiliated with the selected contact.
Start date	The beginning date on which the contact became affiliated with this account.
End date	The date on which the contact ended affiliation with this account.

End users can track a contact’s importance within an organization by defining their role in the Roles list. Users can then refer to this information prior to calls and adjust their discussions with each contact accordingly.

To specify a role for an affiliated account

- 1 Affiliate an account with a contact as described in the previous procedure. For more information, see [“To indicate an affiliation between a contact and an account.”](#)
- 2 In the Account Affiliations list, select an account.

NOTE: When selecting an account, do not drill down on any hyperlinks. Doing so takes you to another view.

- 3 In the Roles list, add a record and complete the necessary fields.

End users can specify the best time to call on an affiliated account in the Best Times list.

To specify the best times to call on an affiliated account

- 1 Affiliate an account with a contact as described in the previous procedure. For more information, see [“To indicate an affiliation between a contact and an account.”](#)
- 2 In the Account Affiliations list, select an account.

NOTE: When selecting an account, do not drill down on any hyperlinks. Doing so takes you to another view.

- 3 In the Best Times list, add a record and complete the necessary fields.

Creating a Contact Assessment

End users can rate and rank a contact on key indicators using the Assessments view. By selecting a predefined template, users can extract a measurable statistic that allows them to determine a relative value of a specific contact.

To create an assessment of a contact

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact for which you want to create an assessment.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4 Click the Assessments view tab.
- 5 In the Assessments list, add a record.

- 6 In the Template Name field, select a template from the Select Assessment dialog box and then click OK.

NOTE: For more information on creating assessment templates, see [“Creating an Assessment Template”](#) on page 327.

Viewing Pre-call Information

The PreCall view tab is a single view that provides end users with a thumbnail view of important information about a contact. Users can access this view prior to making a call to get a summary of key information about the customer they are about to visit.

To view pre-call information

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- Click the PreCall view tab.

The PreCall view appears, displaying the lists described in the following table.

List	Comments
Account Affiliations	Lists all accounts affiliated with this contact. This list can also be populated from the Account Affiliation view tab. For more information, see “Indicating Affiliations Between a Contact and an Account” on page 64.
Best Times	Lists the best times to visit the contact. This list can also be populated in the Addresses view tab. For more information, see “Specifying the Best Time to Call Based on Address” on page 61.
Calls	Features an historical list of all calls made on the contact.
Formulary status	Provides formulary status information for products in affiliated accounts.
Rx Trends	Syndicated data about prescription trends. A show drop-down menu provides options for Rx Trend and Formulary and Rx Trend By Plan. Rx Trend and Formulary shows prescription trends and formulary status information at affiliated accounts. Rx Trend by Plan shows prescriptions by managed care plans. Rx Trend data can be viewed as a chart or as a list.
Notes	Contains end-user notes regarding the selected contact.

- To add information, select the Calls, Best Times, Notes, or Account Affiliations lists, add a record, and complete the necessary fields.

NOTE: The Rx Trend data is not editable in this view.

Tracking Documentation Associated with a Contact

Clinical research associates can attach electronic files, such as CVs, contracts, and reports, that may be associated with a contact and record significant dates, such as the date the document is sent, received, expected, or expires.

To add an attachment to a contact

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact for whom you want to create a document.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4 Click the Document Tracking view tab.
- 5 In the Document Tracking list, add a record and complete the necessary fields.

Some of the fields in a Document Tracking record are described in the following table.

Field	Comments
Activity	Must be Document.
Assigned To	The person to whom responsibility for the document has been assigned.
Expected Date	The date that the signed document is expected to be received from the contact.
Expiration Date	The date the document expires.
Name	The document name. This is a hyperlink to the Attachments view tab.
Lock Assignment	Determine whether the Assigned To field should be locked. If the activity is locked, Assignment Manager will not access it. If it is unlocked, Assignment Manager can reassign it.

- 6 Select the record you just created and click the Attachments view tab.

- 7 Add a record, click the select button in the Name field, and specify the filename or URL of the electronic document you are attaching.

To track documentation associated with a contact

- 1 Navigate to the Contact screen.
- 2 In the Contacts list, select the contact for which you want to track documentation.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 3 Click the Document Tracking view tab.

A list of documents associated with the contact appear.

- 4 Query for the document of interest and complete the necessary fields.

For more information on associating electronic documents with contacts, see [“Creating Documentation Tracking Activities” on page 305](#).

Information for Configurators

This section offers guidelines to follow when configuring this module.

Modifying the Routing of Affiliated Contact Data

In the Account Affiliations view, end users can associate contacts with affiliations. In the preconfigured application, contact data is routed to the members of the team assigned to the contact when the end user does not check the Direct field. For more information, see [“Indicating Affiliations Between a Contact and an Account” on page 64](#).

Siebel configurators can modify routing of contact profile data to send the data to all members of the team assigned to the affiliated account when the end user checks the Direct field.

To modify contact data routing

- 1** In the Siebel server directory, navigate to the SQLTEMPL folder and find the comdb40.sql file.
- 2** Open comdb40.sql and search for ASSGN_GET_DENORM_Contact.
- 3** Remove the comment marker in front of the following line:

```
and p.DIRECT_REL_FLG='Y'
```

Managing Contacts

Information for Configurators

This chapter describes the tools available in Siebel Life Sciences to plan account and contact calls. For more information on recording account and contact calls, see [Chapter 5, “Recording Calls.”](#)

Using the procedures given in this chapter end users will be able to add products to personal lists, create and apply target lists, define route plans, create activities, set up meetings, and schedule calls.

For more information on all end-user tasks associated with planning calls, see “[End-User Procedures](#)” on page 81.

Tools for Planning Calls

Siebel Life Sciences offers end users the following tools for planning their account calls:

- **Personal Lists.** For more information, see [“Personal Lists” on page 74](#).
- **Targeting.** For more information, see [“Targeting” on page 74](#).
- **Routes.** For more information, see [“Understanding Routes” on page 75](#).
- **Activities.** For more information, see [“Understanding Activities” on page 75](#).

Personal Lists

Personal lists allow for faster call reporting by limiting the number of products that appear in drop-down lists. *Before end users can record call details*, they must configure personal lists of the products they detail, the products they distribute as samples, and the products they provide as promotional items. For more information on personal lists, see the business scenario [“Users Set Up Personal Lists” on page 76](#) and [“Creating a Personal List” on page 82](#).

Targeting

Targeting is an extension of querying. In targeting, end users save the results of queries in a target list and then apply those saved lists to other views within the system. A target list can consist of either a set of contacts or accounts and can be applied to any view that contains contacts or accounts.

Using the Targeting screen, users can create advanced queries on contacts and accounts. Users can apply target lists to views individually or in combination with other target lists. If combining multiple target lists, users have the option of applying an intersection or a union of the lists. For more information on targeting, see the business scenario [“Users Create Target Lists” on page 76](#) and [“Creating and Applying Target Lists” on page 84](#).

Understanding Routes

End users can create routes to schedule regular calls to groups of accounts. By defining a route, a user can plan the order in which to visit accounts and the determine a starting time for each account call. Users can also use routes to schedule non-routine calls to accounts by assigning target lists (for example, when supporting a promotion or campaign). By arranging a group of accounts into an efficient route, users can minimize the amount of time spent traveling between accounts. After a route has been created, it can be used repeatedly to schedule future account calls. For more information on routes, see the business scenario [“Users Define Route Plans” on page 77](#) and [“Defining a Route Plan” on page 87](#).

Understanding Activities

An *activity* is a scheduled task or event. Activities represent the ways in which users spend their time. Although activities are typically performed or planned for opportunities, contacts, or accounts, they can also be personal tasks that users want to track. For more information on activities, see the business scenario [“Users Create Activities” on page 79](#) and [“Creating Activities” on page 97](#).

All activities with valid dates and times appear in the Siebel Life Sciences Calendar views as well as in the Activities views. The views in the Calendar screen provide a visual representation of each user’s scheduled activities and appointments. For more information using the calendar, see [“Creating a General Activity in the Calendar” on page 100](#).

Contact and Account Calls

Contact and account calls are a type of activity record. Although users create contact calls in the Contact screen, they actually record calls details in the Activities screen. For more information on scheduling calls, see [“Creating a Contact Call” on page 108](#) and [“Creating an Account Call” on page 112](#). For information on recording calls, see [Chapter 5, “Recording Calls.”](#)

Business Scenarios for Planning Calls

This section outlines four scenarios that are examples of workflows performed by end users in planning calls. Your company may follow different workflows according to its business requirements.

Users Set Up Personal Lists

This scenario describes how end users set up and configure their personal lists. Personal lists determine which products appear in the Name drop-down lists in Siebel Life Sciences. For more information, see [“Personal Lists” on page 74](#).

A sales representative has recently joined a pharmaceutical company which uses Siebel Life Sciences in the field. During her sales training, the representative’s sales manager tells her that before she can record calls within the system, she must first set up her personal lists. The sales manager explains that personal lists allow for faster call reporting by limiting the number of products that appear in the application’s Name drop-down lists. The sales manager then demonstrates how to add products to the sales representative’s Call Products Detailed, Samples Dropped, and Promotional Items Dropped views. Following her manager’s instruction, the sales representative updates all her personal lists and is ready to record call details.

The workflow for this business scenario comprises two end-user procedures:

- **Configure personal lists.** For more information, see [“Creating a Personal List” on page 82](#).
- **Record contact and account calls.** For more information, see [Chapter 5, “Recording Calls.”](#)

Users Create Target Lists

This scenario describes how end users use targeting to create lists of contacts and accounts. Targeting is an extension of querying. In targeting, end users save the results of queries in a target list and then apply those saved lists to other views within the system. For more information, see [“Targeting” on page 74](#).

A sales representative for a pharmaceutical company has just been assigned a new territory. As a first step in becoming more familiar with her territory, she queries Siebel Life Sciences and creates target lists of the following information:

- Contacts located within specific zip codes, bricks, or cities with NRx (new Rx) in Product A greater than 100 over the last two months
- The highest-potential contacts in a given zip code or city with a Best Time To Call setting that includes noon to 1:00 p.m. on Tuesdays (useful if a lunch appointment cancels)
- Accounts with sales in Product B greater than \$60,000 over the last half-year that are available for calls on Monday afternoons, located within a specific range of zip codes, and last seen over five weeks ago
- Accounts or contacts with high ratings in a product's therapeutic class but low ratings in a specific product

Once she has saved these target lists, she can apply them to other views within the application.

The workflow for this business scenario comprises two steps:

- 1 Create and save a target list.** For more information, see [“To create a target list” on page 85.](#)
- 2 Apply target lists to other views.** For more information, see [“To apply one or more target lists” on page 86.](#)

Users Define Route Plans

This section illustrates how end users can use the Routes views to group accounts by location and then use that information to schedule calls. The second business scenario illustrates how sales managers can create routes and schedule calls for the sales representatives they manage.

Sales Representative Creates Routes to Schedule Account Calls

A sales representative for a pharmaceutical company needs to plan his account call schedule. Because he always visits the same accounts in the same order, he decides to organize his accounts into routes so that he can efficiently schedule all account calls.

He begins by dividing up his accounts into specific geographic areas. Then, he creates a four-day route that includes all accounts in the outlying portions of his sales territory. In addition to specifying which accounts fall into what routes, he defines additional details such as the starting time and the duration of each call. Once all routes have been defined, he schedules calls to all accounts in his territory for the upcoming month.

Sales Manager Creates Routes for New Direct Report

A sales manager for a pharmaceutical company manages 10 sales representatives. One of her representatives, a new employee, is not familiar with his territory. To help her new representative get up-to-speed, she organizes the new representative's accounts into a series of routes.

Each route is divided into sections and will be visited every two weeks. The sales manager creates 10 routes—one for each workday in a two-week period. Each route includes multiple accounts in the same neighborhood. Once the sales manager has finished creating the routes, she uses them to schedule a month's worth of account calls for her new sales representative.

Once her new direct report becomes familiar with his territory, she gives him the responsibility of maintaining and updating his routes. The new sales representative can then add new accounts to a route, change the order in which routes are visited, or adjust the start time and duration of each visit.

The workflow for this business scenario comprises four procedures:

- 1 Create a route.** For more information, see [“To create a route” on page 88](#).
- 2 Add accounts to a route.** For more information, see [“To add accounts to a route using the Accounts view tab” on page 90](#).
- 3 Optional: Assign target lists to a route.** For more information, see [“To assign a target list to a route” on page 94](#).
- 4 Schedule account visits using routes.** For more information, see [“Using a Route to Schedule Calls” on page 95](#).

Users Create Activities

This scenario describes how end users use activities to manage their own time, keep their manager informed of their workload, and track their expenses. Typically activities are performed or planned for opportunities, contacts, or accounts, but they can also be used to track personal tasks. Consider the following example.

A sales manager for a pharmaceutical company wants to review her schedule. She uses the Activities screen in Siebel Life Sciences to create, categorize, and track all the activities on which she plans to spend her time during the next month.

From the My To Do List view, she prints a report detailing her current activities, their due dates, and all pertinent account information. Remembering she wants to meet with each of her direct reports in next two weeks, she prints a report summarizing all the calls her team has made over a 20-week period. Then, she schedules meeting with each of her direct reports to discuss their sales goals for the next quarter. Finally, she schedules a contact call with a prominent customer whose regular sales representative is on a long leave. Then, she reviews the Calendar screen to review her schedule for the upcoming weeks.

NOTE: End users also use the Activities screen to record and submit details of Contact and Account Calls. For more information, see [Chapter 5, “Recording Calls.”](#)

The workflow for this business scenario comprises four procedures:

- 1 Create general activities.** For more information, see [“Creating Activities” on page 97.](#)
- 2 Create contact or account call.** For more information, see [“Creating a Contact Call” on page 108](#) and [“Creating an Account Call” on page 112.](#)
- 3 Set up a meeting.** For more information, see [“Setting Up a Meeting” on page 104.](#)
- 4 View activities and create new activities on the Calendar screen.** For more information, see [“Creating a General Activity in the Calendar” on page 100.](#)

Example Workflow for Planning Calls

This section details sample tasks often performed by end-users when planning calls. Your company may follow a different workflow according to its business requirements.

The following list shows tasks end users typically perform when planning contact and account calls:

- **Set up and update their personal lists.** Personal lists determine which products appear in the Call Detail views in Siebel Life Sciences. For more information, see [“Users Set Up Personal Lists” on page 76](#).
- **Optional: Create and apply target lists.** Using target lists users can query for accounts or contacts and then apply those lists to other views within the application. For more information, see [“Users Create Target Lists” on page 76](#).
- **Optional: Create route plans.** Route plans are groups of accounts sorted by location. Once created, users can use route information to schedule calls. For more information, see [“Users Define Route Plans” on page 77](#).
- **Optional: Add general activities, set up meetings, and create calls.** Activities allow users to manage their own time, keep their manager informed of their workload, and track expenses. For more information, see [“Users Create Activities” on page 79](#).
- **Create contact and account calls.** For more information, see [“Creating a Contact Call” on page 108](#) and [“Creating an Account Call” on page 112](#).

NOTE: As soon as end users set up their personal list, they can record calls. For more information, see [“Recording Contact Calls” on page 124](#) and [“Recording Account Calls” on page 129](#).

End-User Procedures

The following end-user procedures are described in the section:

- Updating a personal list:
 - [To add a product to a personal list on page 83](#)
- Creating and applying target lists:
 - [To create a target list on page 85](#)
 - [To delete a target list on page 86](#)
 - [To apply one or more target lists on page 86](#)
- Creating a route plan:
 - [To create a route on page 88](#)
 - [To add accounts to a route using the Accounts view tab on page 90](#)
 - [To add accounts to a route using the Explorer view tab on page 91](#)
 - [To merge a target list on page 92](#)
 - [To assign a target list to a route on page 94](#)
 - [To schedule calls from the My Routes view on page 95](#)
 - [To schedule calls from the Target Accounts view on page 96](#)
- Creating activities:
 - [To add a general activity on page 99](#)
 - [To create a general activity in the Calendar view on page 100](#)
 - [To give other users access to your calendar on page 103](#)
- Setting up meetings:
 - [To add a meeting on page 104](#)
 - [To add a meeting activity on page 105](#)

- To add a meeting speaker on page 106
- To add a meeting invitee on page 107
- To update the Cost field in the Meeting Invitees list on page 108
- Creating contact calls:
 - To add a contact call from the Activities screen on page 109
 - To automatically schedule a contact call using the Schedule button on page 110
 - To manually schedule a contact call in the Calls view tab on page 111
 - To schedule a contact call in the Calendar on page 111
- Creating account calls:
 - To add an account call from the Activities screen on page 112
 - To automatically schedule an account call using the Schedule button on page 114
 - To manually schedule an account call in the Account view tab on page 114
 - To add an account call using the New Call button on page 115
 - To schedule an account call in the Calendar on page 115

Creating a Personal List

Personal lists determine which products appear in the drop-down lists of the Call Products Detailed, Samples Dropped, and Promotional Items Dropped views. End users must specify at least one product in a personal list or the corresponding drop-down list will be empty when they try to enter call details. For more information on recording calls, see [Chapter 5, “Recording Calls.”](#)

Setting up personal lists is a one-time setup procedure. Once end users have completed it, they do not need to repeat it. However, they can revise their personal lists at any time, deleting or adding products as necessary. For more information on personal lists, see [“Personal Lists” on page 74](#) and the business scenario [“Users Set Up Personal Lists” on page 76](#).

To add a product to a personal list

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select one of the following:
 - **Personal Details List.** Adds products to the Personal Details List.
 - **Personal Samples List.** Adds products to the Personal Samples List.
 - **Personal Promotional Items List.** Adds products to the Promotional Items List.
- 3 In the appropriate list, add a record and complete the necessary fields.

Some of the fields on the Activities view are described in the following table.

Field	Comments
Product	The products being detailed during contact and account calls. This field appears in the Product Details List.
Sample	The products to be dropped as samples during contact and account calls. This field appears in the Personal Samples List.
Promotional Item	The promotional items being dropped during contact and account calls. This field appears in the Personal Promotional Items List.
Order	<p>Enter a number that indicates where this product should appear in the drop-down list. This field appears in the Product Details List, Personal Samples List, and Personal Promotional Items List.</p> <p>For example, if you want a product in the Product Details List to appear first, enter 1. If this field is null for <i>all</i> products in the list, the products will appear in alphabetical order. If this field is null for some products but not for others, records with a null Order field appear at the beginning of the list, in alphabetical order.</p>

Complete this procedure for each of the views:

- Personal Details List view
- Personal Samples List view
- Personal Promotional Items List view

Creating and Applying Target Lists

Targeting is an extension of querying. In targeting, end users save the results of queries in a target list and then apply those saved lists to other views within the system. A target list can consist of either a set of contacts or accounts and can be applied to any view that contains contacts or accounts. For more information on targeting, see [“Targeting” on page 74](#) and the business scenario [“Users Create Target Lists” on page 76](#).

To create a target list, users must perform these steps:

- **Create and save a target list.** Users must create a query to locate the contacts or accounts they want to target. Saving a target list gives the query a descriptive name and optionally allows the user to capture the creation date. For more information, see [“To create a target list” on page 85](#).

NOTE: A saved target list consists only of contacts or accounts that matched the query criteria *when the query was performed*. Remember to periodically re-create your target lists to include contacts or accounts who were added after the target list was saved, or whose data has changed since the target list was saved.

- **Apply target list to other views.** Once saved, users can apply a target list in any view which contains contacts or accounts, including forms, charts, and some dialog boxes. For more information, see [“To apply one or more target lists” on page 86](#).

For example, a user could create a target list of contacts using one of the views in the Targeting screen, apply it to a view in the Contacts screen, and then print a report on those contacts. Or, a user could use the target list to generate a list of meeting invitees in the Activities screen. In this second example, the user would apply the target list in the Add Invitees view tab. For more information, see [“Setting Up a Meeting” on page 104](#).

NOTE: In order to enhance system performance, logging for targeting is disabled by default. To enable logging for targeting, locate the Pharma Targeting Detail and Pharma Targeting Header business components in Siebel Tools and set the Enable Log Changes property to TRUE.

To create a target list

- 1 Navigate to the Targeting screen.
- 2 From the Show drop-down list, select Contact Attributes.

NOTE: If Contact Attributes is not the view you want to use, make another selection from the Show drop-down list. To target contacts, select Contact Attributes or Contact Profiles. To target accounts, select Account Attributes or Account Profiles.

- 3 In the Contact Attributes form, click Query.
The application clears all fields in all forms.
- 4 Enter your query criteria in the appropriate fields of the Contact Attributes and Rx Consumption forms.

NOTE: Remember that the more fields in which you enter query criteria, the longer the query will take to execute. Also, entering a query condition that is too general may also lengthen the query execution time.

- 5 In the Contact Attributes form, click Go.
The application returns the query results in the Target Contacts list.
- 6 Click the save target list button.

NOTE: The save target list button is located in the row of buttons next to the history button.

- 7 In the Save Target List dialog box, enter a unique name (up to 50 characters long) in the Target Name field and click Save.

CAUTION: If you enter a name already in use, the previously saved target list will be overwritten without warning.

The application saves the target list.

NOTE: The saved target list includes only those records that matched the query criteria *when the query was generated*. You should re-create your target lists periodically, since data may have been modified, or new contacts or accounts may have been added since you created the target list. For example, you must re-create your target lists after a territory realignment.

To delete a target list

NOTE: This procedure can also be used in any Siebel Life Sciences view that supports target lists and in which the Save Target List command is available from the Edit application-level menu.

- 1** Navigate to the Targeting screen.
- 2** From the Show drop-down list, select the type of list you want to delete:
 - To delete a list of contacts, select Contact Attributes or Contact Profiles.
 - To delete a list of accounts, select Account Attributes or Account Profiles.
- 3** From the application-level menu, choose Edit > Save Target List.

The Save Target List dialog box appears.
- 4** In the Save Target List dialog box, select the target list you wish to delete and click Delete.

Target lists can be applied in any Siebel Life Sciences view in which the Apply Target List command is available on the Edit application-level menu. Typically, users apply target lists to lists that display contacts or accounts. However, they can also apply them to forms and dialog boxes from which they select contacts to populate a field.

To apply one or more target lists

- 1** Navigate to the view or dialog box in which you want to apply the target list.

- 2 Click the apply target list button.

NOTE: The save target list button is located in the row of buttons next to the history button.

The Apply Target List dialog box appears.

- 3 In the Target Name field, select one or more target lists and click one of the following:
 - **Intersection.** Click Intersection to retrieve only those records common to *all* the selected target lists. For example, if List 1 contains A, B, and C, and List 2 contains B, C, and D, the resulting list will contain only B and C, which are common to both target lists.
 - **Union.** Click Union to retrieve all records from all the selected lists. For example, if List 1 contains A, B, and C, and List 2 contains B, C, and D, the resulting list will contain A, B, C, and D, the combination of both target lists.

Defining a Route Plan

End users can create routes to schedule regular calls to groups of accounts. By defining a route, a user can plan the order in which to visit accounts and determine a starting time for each account call. For more information, see [“Understanding Routes” on page 75](#) and the business scenario [“Users Define Route Plans” on page 77](#).

When creating a route, users must complete the following tasks in the order lists:

- **Create a route.** Users must specify the person for whom they are creating the route. Although each user can be assigned multiple routes, each route can only be assigned to one user. For more information, see [“To create a route” on page 88](#).
- **Add accounts to a route.** Once users have established a route, they can add accounts to it. There is no limit to the number of accounts that can be assigned to one route.

- **Optional: Assign a target list to a route.** If a user is using the Account Targeting features to create target lists, they can assign them to a route. For more information, see [“To assign a target list to a route” on page 94](#).
- **Schedule calls.** When a route has been created, users can use it to schedule calls to every account in the route. For more information, see [“To schedule calls from the My Routes view” on page 95](#) and [“To schedule calls from the Target Accounts view” on page 96](#).

NOTE: When creating and scheduling a route with a limited duration, such as in support of a promotion, users can perform all the proceeding steps in the Targeting screen.

Creating a Route

When creating a route, users must specify the person for whom they are creating the route (generally a field sales manager or sales representative). When creating a route remember that:

- Each user can be assigned many routes
- A route can have any number of accounts
- A route can only be assigned to one user
- A route name can only be used once for each user
- The same route name can be used for routes assigned to different users

To create a route

- 1 Navigate to the Routes screen.
- 2 From the Show drop-down list, select My Routes.

- 3 In the Routes form, add a record and complete the necessary fields.

NOTE: In the My Routes view, the Sales Person field is automatically filled with the current user name. If you are assigning a route to someone other than yourself, enter that person’s name in the Sales Person field.

Some of the fields in a Routes record are described in the following table.

Field	Comments
Active	Select this field if the route is active and available for use in scheduling calls.
Description	A description of the route.
Last Updated	The application automatically populates this field with the time and date the route was last changed.
Route Name	A user-defined name for the route, such as Northeast Richmond. A route name must be unique to the end user to which it is assigned.
Sales Person	The sales person to whom the route is assigned. A route can be assigned only to one person.
Start Day	The day of the week on which the route is designated to begin. This is used as reference information only and does not prevent you from using the route to schedule calls starting on some other day of the week.
Updated By	The application automatically populates this field with the name of the user who last changed the route.

Adding Accounts to a Route

Once users have established a route, they can add accounts to it. There is no limit to the number of accounts that can be assigned to one route. Two views are available for adding accounts to routes:

- **Accounts view tab.** Shows accounts associated with the selected routes. For more information, see [“To add accounts to a route using the Accounts view tab” on page 90.](#)

- **Explorer view tab.** Shows routes and accounts in a hierarchical format. For more information, see [“To add accounts to a route using the Explorer view tab” on page 91.](#)

NOTE: When associating an account with a route, only select accounts where the owner of the route is represented on the sales team. It is possible to pick any existing account in the database when associating an account with a route. There is no check to determine whether you or the owner of the route has access to the account. This is standard behavior; dialog boxes for Accounts are always unconstrained. When drilling into an account which is not accessible to you, an error message will appear, stating that you do not have the required access to view that account. This is especially relevant for Siebel Mobile Web Client users who can only view their own accounts on their local database.

To add accounts to a route using the Accounts view tab

- 1** Navigate to the Routes screen.
- 2** From the Show drop-down list, select My Routes.
- 3** In the Routes list, select a route.
- 4** Click the Accounts view tab.
- 5** In the Accounts list, add a record and then click the Select button in the Account field.

The Pick Account dialog box appears.

- 6** In the Pick Account dialog box, select an account and click OK.
- 7** For each new account, complete the necessary fields.

Some of the fields in an Account record are described in the following table.

Field	Comments
Call Duration	The scheduled duration of the account call.
Call Time	The application automatically enters the current time in this field. Edit the value to reflect the time at which the account is to be visited.

Field	Comments
Last Call	Identifies the date and time of the most recent call to this account.
Offset Day	<p>Allows you to create routes that span more than one day. Indicates the number of days after the beginning of the route that an account should be visited.</p> <p>For example, if an account is to be visited on the first day of a route, this field should be set to 0. If the account is to be visited on the second day of a route, this field should be set to 1.</p>

Repeat [Step 5 on page 90](#) through [Step 7 on page 90](#) until all accounts have been added to the Accounts list.

To add accounts to a route using the Explorer view tab

- 1** Navigate to the Routes screen.
- 2** From the Show drop-down list, select My Routes.
- 3** In the Routes list, select a route
- 4** Click the Explorer view tab.
- 5** In the Routes explorer tree, click the plus sign next to the route to which you want to add an account.
- 6** Click the plus sign next to the Accounts folder displayed under the route.
A list of all the accounts assigned to the route appears.
- 7** In the Accounts list, add a record and then click the Select button in the Account field.
The Pick Account dialog box appears.
- 8** In the Pick Account dialog box, select an account and click OK.

- 9 For each new account, complete the necessary fields.

Some of the fields in an Account record are described in the following table.

Field	Comments
Call Duration	The scheduled duration of the account call.
Call Time	The application automatically enters the current time in this field. Edit the value to reflect the time at which the account is to be visited.
Last Call	Identifies the date and time of the most recent call to this account.
Offset Day	Allows you to create routes that span more than one day. Indicates the number of days after the beginning of the route that an account should be visited. For example, if an account is to be visited on the first day of a route, this field should be set to 0. If the account is to be visited on the second day of a route, this field should be set to 1.

Repeat [Step 7 on page 91](#) through [Step 9](#) for each account you want to add.

Assigning Target Lists to a Route

After creating and saving a target list, end users can optimize a target list by merging (intersecting, excluding, or combining) it with other target lists. Once target lists have been merged, users can assign the results to a route. Users can also add or delete accounts after assigning the list of accounts to a route.

NOTE: End users must create and save a target list using the Account Targeting feature before they can merge it with other target lists and assign the results to a route. For information on creating and saving target lists, see [“Creating and Applying Target Lists” on page 84](#).

To merge a target list

- 1 Navigate to the Routes screen.
- 2 From the Show drop-down list, select My Routes.

- 3 In the Routes list, select a route.
- 4 Click the Target Accounts view tab.
- 5 Click the Target Accounts list to activate it.
A blue line appears around the Target Accounts list.
- 6 Click the apply target list button.

NOTE: The save target list button is located in the row of buttons next to the history button.

The Apply Target List dialog box appears.

- 7 In the Target Name field, select one or more target lists, click one of the following, and then click OK:
 - **Intersection.** Click Intersection to retrieve only those records common to *all* the selected target lists. For example, if List 1 contains A, B, and C, and List 2 contains B, C, and D, the resulting list will contain only B and C, which are common to both target lists.
 - **Union.** Click Union to retrieve all records from all the selected lists. For example, if List 1 contains A, B, and C, and List 2 contains B, C, and D, the resulting list will contain A, B, C, and D, the combination of both target lists.

NOTE: If only one target list is selected, the radio buttons are ignored.

- 8 Optional: To apply additional logic to the target list, click the save target list button, located in the row of buttons next to the history button.
The Targeting dialog box appears.
- 9 In the Target Name field, enter a unique name for the target list.

CAUTION: If you enter a name already in use, the previously saved target list will be overwritten without warning.

10 Click Save.

The target list is saved. You can merge this list with other target lists to optimize your list of accounts.

Repeat [Step 6 on page 93](#) through [Step 10](#) until you have optimized your target list. You are now ready to assign the target list to a route.

To assign a target list to a route

- 1** Navigate to the Routes screen.
- 2** From the Show drop-down list, select My Routes.
- 3** In the Routes list, select a route.
- 4** Click the Target Accounts view tab.
- 5** In the Target Accounts list, merge target lists until you have an optimized list of accounts.

NOTE: For information on merging target lists, see [“To merge a target list” on page 92](#).

- 6** In the Target Accounts list, select the accounts that you want to add to a route.
- 7** Click the Double Arrow button.

The selected accounts are added to a route and appear in the Accounts list. When you are adding target accounts to an existing route, the target accounts will be added without duplicating accounts. If necessary, you can add or delete accounts from the Accounts list.

- 8 Fill in the fields in the Accounts list for each account you added.

Some of the fields in the Accounts record in are described in the following table.

Field	Comments
Call Duration	The scheduled duration of the account call.
Call Time	The current time is automatically entered in this field. You should edit this field to reflect the time at which the account is to be visited.
Last Call	Identifies the date and time of the most recent call to this account.
Offset Day	Allows you to create routes that span more than one day. It indicates the number of days after the beginning of the route that an account should be visited. For instance, if an account is to be visited on the first day of a route, this field should be set to 0. If the account is to be visited on the second day of a route, this field should be set to 1.

Using a Route to Schedule Calls

After a route has been created, end users can use it to schedule calls to all the listed accounts. Users can schedule route calls from a number of views. The following procedures demonstrate how to schedule routes from the My Routes view, the Target Accounts view, and the Daily Calendar view.

To schedule calls from the My Routes view

- 1 Navigate to the Routes screen.
- 2 From the Show drop-down list, select My Routes.
- 3 In the Routes list, select the route you want to schedule.
- 4 In the More Info form, click Schedule.

The Auto Schedule dialog box appears.

- 5 In the Start Date field, enter a date, and then click OK.

Appointments for each account in the route are added to the calendar of the end user to whom the route is assigned.

CAUTION: It is possible to schedule multiple appointments for the same time period when using the Routes views to schedule calls. Such scheduling conflicts do not trigger any sort of automatic notification. Sales representatives should check the Daily Calendar view for possible conflicts after routes have been added to their schedules. If scheduling conflicts exist, they should adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

To schedule calls from the Target Accounts view

- 1 Navigate to the Routes screen.
- 2 From the Show drop-down list, select My Routes.
- 3 In the Routes list, select a route.
- 4 Click the Target Accounts view tab.
- 5 Assign a target list of accounts to the route.

For information on assigning a target list of accounts to a route, see [“To assign a target list to a route” on page 94](#).

- 6 In the Target Accounts form, click Schedule.

The Auto Schedule dialog box appears.

- 7 In the Start Date field, enter a date, and then click OK.

Appointments for each account in the route are added to the calendar of the end user to whom the route is assigned.

CAUTION: It is possible to schedule multiple appointments for the same time period when using the Routes views to schedule calls. Such scheduling conflicts do not trigger any sort of automatic notification. Sales representatives should check the Daily Calendar view for possible conflicts after routes have been added to their schedules. If scheduling conflicts exist, they should adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

Creating Activities

End users use general activities to manage their own time, keep their manager informed of their workload, and track their expenses. Managers can also create general activities and assign them to members of their teams. The kinds of activities that end users can create in Siebel Life Sciences include:

- **General.** Used to track non-call and non-meeting tasks such as to-do items, personal events, and correspondence. Users can create an alert for a general activity to remind them of significant tasks or events.
- **Contact call.** Used to track a planned or past call activity with a contact. Users can record details about contact calls such as the products detailed, the samples and promotional items dropped, and decision issues discussed. Before users can record details about a contact call, they must set up their personal lists. For more information, see [“Creating a Personal List” on page 82](#).
- **Account call.** Used to track a planned or past call activity at an account. Users can record products detailed, attendees, promotional items dropped, and decision issues discussed. For more information, see [Chapter 5, “Recording Calls.”](#)
- **Meeting.** Used to track meetings, such as a “lunch-and-learn” or a symposium, designed to increase sales through product awareness. A meeting typically involves one or more speakers who give presentations in support of one or more products. For more information, see [“Setting Up a Meeting” on page 104](#).

- **Time off territory.** Used to track blocks of time that users spend on activities not directly associated with an account or contact. Examples of time off territory can include field training sessions, national sales meetings, vacations, or personal activities such as doctor's appointments. For more information on working with time off territory activities, see [“Tracking Time Off Territory” on page 233](#).
- **MedEd activity.** Used to track and plan medical education events such as a “lunch-and-learn” meetings or seminars. A MedEd event is similar to a meeting activity, but offers planning, budgeting, and cost aggregation functionality. MedEd activities are only associated with the separate Siebel MedEd module. For more information, see [“Managing MedEd Events” on page 243](#).
- **Subject activities.** Used to track subject activities for a protocol. Subject activities are generated by applying the visit template based on the screening or enrollment date. Visit activities can also be created for a non-scheduled visit. For more information, see [“Adding a Subject and Setting Up Visits and Visit Activities” on page 312](#).
- **Clinical protocol site activities.** Used to track the activities associated with initiating the protocol sites, for example, collecting the essential documents. For more information, see [“Creating Site Activity Plans” on page 332](#).
- **Checklist activities.** Used to provide a checklist for clinical research associates (CRAs) to check activities associated with visiting a protocol site. Once a trip report record has been created, checklist activities are generated by selecting a trip report template. Checklist activities specific to a trip report can also be added to a trip report from the Trip Report Details view. For more information, see [“Creating a Trip Report Before a Site Visit” on page 356](#).
- **Follow-up activities.** Used to record follow-up issues for a trip report. Users can add a follow-up activity to a trip report from the Trip Report Details view. Only the follow-up activities with open status are listed in a Follow-up Activities report generated from the Reports menu. For more information, see [“Creating a Trip Report Before a Site Visit” on page 356](#).
- **Project Activities.** Used to track activities associated with clinical projects. These activities appear in the Projects screen and the Activities screen and can be created by project activity templates and by importing from Microsoft Project files. For more information, see [“Adding Activities and Tasks to a Project” on page 380](#).

For more general information on activities, see [“Understanding Activities” on page 75](#) and the business scenario [“Users Create Activities” on page 79](#).

NOTE: End users also use the Activities screen to record and submit details of contact and account calls. For more information, see [Chapter 5, “Recording Calls.”](#)

Adding a General Activity

End users use general activities to manage their own time, to keep their manager informed of their workload, and to track their expenses. Managers can also create general activities and assign them to members of their teams.

To add a general activity

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select My Activities.
- 3 Click the More Info view tab.
- 4 In the More Info form, add a record and complete the necessary fields.

Some of the fields in the Activities record are described in the following table.

Field	Comments
Change Request #	The change request with which the activity is associated, if relevant.
Description	A description of this activity.
Duration	The length of time, in minutes, that you expect the activity to take.
Employees	Delegate the activity to someone else. Select the appropriate employee and click OK. If you delegate an activity this way, the activity appears in the My Delegated Activities view.
Expense	Select this field to include the activity in an expense report generated by the Siebel Expenses module. For information on expense reports, see <i>Online Help</i> .

Field	Comments
Suppress Calendar	Selecting this field causes the activity to not appear in Calendar views.
Type	The type of activity. If you select Alert, the activity appears in the My Alerts view. The values displayed in this drop-down list depend on the value of the Activity field. For example, the activity types that you can select for a contact call are different from those that you can select for a general activity.

Creating a General Activity in the Calendar

The views in the Calendar screen provide visual representations of a user's scheduled activities, or *appointments*; that is, activities with a start time. For instance, in the My Daily view, users can see a particular day's agenda, their unscheduled activities, or a to-do list. To appear in the Calendar views, all activities must have a start time.

To create a general activity in the Calendar view

- 1 Navigate to the Calendar screen.
- 2 From the Show drop-down list, select My Calendar.

The My Daily Calendar view appears, displaying the current date.

- 3 Select one of the view tabs described in the following table:

View tab	Description
My Daily	Shows activities for the day and allows users to create general activities.
My Weekly	Shows scheduled activities for the week in a calendar grid and allows users to create general activities.
My Monthly	Shows scheduled activities for the month in a calendar grid or list format and allows you to create general activities.

- 4 Navigate to the day on which you want to schedule a general activity and add a record.

NOTE: If you are performing this procedure from the My Weekly view or the My Monthly view, you must first select the day on which you want to schedule the appointment.

- 5 In the Calendar Detail form, click the show more button and complete the necessary fields.

NOTE: This procedure describes how to create a general activity. For more information on creating a call in the Calendar, see [“To schedule a contact call in the Calendar” on page 111](#) and [“To schedule an account call in the Calendar” on page 115](#).

Some of the fields in a Calendar Detail record are described in the following table.

Field	Comments
Account	Complete this field if the activity is related to a particular account. The value of this field cannot be modified for Contact Call activities.
Alarm	Select this field to have an alarm remind you of the appointment. A setting on the Calendar tab of the Options dialog box determines how many minutes before the appointment the alarm will ring.
Contacts	Complete this field if the activity is related to a particular contact.
Cost Estimate	Enter a cost to include the call in an expense report generated by the Siebel Expenses module.
Duration	This value is based on the duration preset on the Calendar tab of the Options dialog box. When you change the duration, the end time is automatically updated.
Employees	The employees assigned to this activity. Select an employee from the Employees dialog box if the activity is assigned to particular employees.

Field	Comments
Expense	Select this field to include the activity in an expense report generated by the Siebel Expenses module. For information on expense reports, see <i>Online Help</i> .
Frequency	Select a frequency of your repeating appointment; Weekly is the default.
Opportunity	Complete this field if the activity is related to a particular opportunity. If the opportunity is for a different account than the one listed in the Account field, the account field will be updated automatically. The value of this field cannot be modified for Contact Call activities.
Planned Completion	This value is based on the duration preset on the Calendar tab of the Options dialog box. When you change the end time, the duration is automatically updated.
Planned Start	If you started from the Daily Calendar view, this date reflects the time selected when you created the new appointment. If you started from the Weekly Calendar or Monthly Calendar view, the first time slot of the day (set on the Calendar tab of the Options dialog box) is supplied.
Repeat	Select this field to have this appointment repeat at regular intervals in the future.
Type	The type of activity. The default value is Other. If you select Alert, the activity appears in the My Alerts view. The values displayed in this drop-down list depend on the kind of activity; that is, a contact call will display different values for this field than you see for a general activity.
Until	The end date of a repeating appointment. If you do not select a value, 12 more appointments will be scheduled. The value of this field cannot be modified for Contact Call or Account Call activities.

- 6 Click Save This One.

The new appointment appears in the Calendar view.

NOTE: From the My Daily view tab, you can also create an activity in the Activities list by right-clicking and choosing New Record. The Activities list only shows an activity if the Start Time field of the activity is blank. Once you give the activity a start time and refresh the view, the activity appears in the Daily Agenda.

- 7 To print the current Calendar view, click Print.
- 8 To edit an existing activity, drill-down on the activity description hyperlink.
The Calendar Detail form appears.

To create specialized activities in the Calendar view

- Click New Contact Call to schedule a call to a contact.
- Click New Acct Call to schedule a call to an account.
- Click New Meeting to schedule a meeting and to list activities, meeting speakers and invitees.

Users who work as part of a team, may find it useful to share access to their calendar.

To give other users access to your calendar

- 1 Navigate to the Calendar screen.
- 2 From the Show drop-down list, select Calendar Access List.
- 3 In the Calendar Access list, add a record.
- 4 In the Add Employees dialog box, select one or more employees and click OK.
The employee's name and login name appear in the Calendar Access list.
- 5 To give an employee the ability to modify your calendar items, click the Allow Updates field.

Setting Up a Meeting

Use the Meetings subviews of the Activities screen to manage information about activities, speakers, and invitees associated with meetings. Meetings themselves are activities that appear in the My Activities view. The activities that a user adds for a meeting are child records of the meeting and are *not* displayed in the Activities list in the My Activities view; they appear only in the Meeting Activities view and in the Calendar views.

NOTE: A MedEd event is similar to a meeting activity, but offers planning, budgeting, and cost aggregation functionality. MedEd activities are only associated with the separate Siebel MedEd module. For more information, see [Chapter 11, “Managing MedEd Events.”](#)

Setting up a meeting involves the following steps:

- **Add a new meeting record.** For more information, see [“To add a meeting” on page 104.](#)

NOTE: Users can also add a meeting by clicking the New Meeting button in the Activities list of the My Activities view.

- **Add activities for the meeting.** For more information, see [“To add a meeting activity” on page 105.](#)
- **Add speakers for the meeting.** For more information, see [“To add a meeting speaker” on page 106.](#)
- **Add invitees for the meeting.** For more information, see [“To add a meeting invitee” on page 107.](#)

To add a meeting

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, My Activities.
- 3 In the Activities list, click New Meeting.

The Meetings form appears.

4 In the Meetings form, complete the necessary fields.

Some of the fields in the Meetings record are described in the following table.

Field	Comments
Account	The account associated with this meeting. Select an account from the Pick Account dialog box. The Location and Site fields are automatically filled based on the account you specify.
Cost	The application calculates this field based on costs entered for meeting activities. For more information, see “To add a meeting activity” on page 105 . The application calculates this field when you click the Distribute Costs button in the Meeting Invitees view and updates it each time you click the Distribute Costs button again. For more information, see “To add a meeting invitee” on page 107 .
Name	The name of this meeting.
Start Date	The application automatically populates this field with the date and time that the record was created. If needed, make additional changes.
Status	The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values. This field is hard-coded so that its value cannot be set to Submitted to avoid interference with other activity types, such as contact calls and account calls that are based on the same class of Siebel business components.

Add information about activities, speakers, and invitees, as described in the following procedures.

To add a meeting activity

- 1** Navigate to the Activities screen.
- 2** From the Show drop-down list, select My Activities.
- 3** In the Activities list, do one of the following:
 - Create a new meeting. For more information, see [“To add a meeting” on page 104](#).
 - Select an existing meeting and then drill-down on the Activity field.

The Meetings form appears.

- 4 Click the Meeting Activities view tab.
- 5 In the Meeting Activities list, add a record and complete the necessary fields.

Some of the fields in the Meeting Activities record are described in the following table.

Field	Comments
Activity	The type activity associated with this meeting.
Cost	Enter the cost related to this activity, if applicable. This information is used to distribute meeting costs across attendees. For more information, see “To add a meeting invitee” on page 107.

Add information about speakers and invitees, as described in the following procedures.

NOTE: Meetings are activities that appear in the My Activities view. However, activities that you add to a meeting are child records of the meeting. These records only appear in the Meeting Activities tab view and as activities in the Calendar views.

To add a meeting speaker

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select My Activities.
- 3 In the Activities list, do one of the following:
 - Create a new meeting. For more information, see [“To add a meeting” on page 104.](#)
 - Select an existing meeting and then drill-down on the Activity field.
The Meetings form appears.
- 4 Click the Meeting Speakers view tab.

- 5 In the Meeting Speakers list, add a record.

The Add Speakers dialog box appears.

- 6 In the Add Speakers dialog box:
 - If no contacts appear, click All Contacts.
 - To only display contacts affiliated with the selected account, click Affiliated Contacts.
 - Select those contacts you want to add as speakers for the meeting and click OK.

New records for the selected contacts are added to the Speakers list.

Add information about invitees, as described in the following procedure.

To add a meeting invitee

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select My Activities.
- 3 In the Activities list, do one of the following:
 - Create a new meeting. For more information, see [“To add a meeting” on page 104](#).
 - Select an existing meeting and then drill-down on the Activity field.

The Meetings form appears.

- 4 Click the Meeting Invitees view tab.
- 5 In the Meeting Invitees list, add a record.

The Add Invitees dialog box appears.
- 6 In the Add Invitees dialog box:
 - Click Affiliated Contacts to display only contacts affiliated with the selected account. For more information, see [“Indicating an Affiliation Between an Account and a Contact” on page 200](#).

- Click All Contacts, if no contacts appear.
- Select those contacts you want to add as invitees for the meeting and click OK.

New records for the selected contacts are added to the Speakers list.

The application calculates the value of the Cost field the Meeting Invitees list based on values entered in Cost field of the Meeting Activities list. It then distributes the costs across all invitees whose Invitee Status field is set to Attended.

To update the Cost field in the Meeting Invitees list

- 1** Click the Meeting Activities view tab.
- 2** In the Meeting Activities list, record the costs associated with each meeting activity in the Cost field.
- 3** To distribute the meeting costs across those individuals who attended the meeting, click the Meeting Invitees view tab.
- 4** In the Meeting Invitees list, update the Invitee Status for each invitee. Selecting the status Attended includes the selected invitee in the count of contacts for distribution of meeting costs.
- 5** Click Distribute Costs.

As you add costs and attendees to the meeting, repeat the previous steps as many times as needed.

Creating a Contact Call

End users track details about calls made on a contact with contact call records. Although users can create and display contact calls on the Contacts screen, they enter details about the actual call on the Activities screen. Also, as activities, contact call records can also be viewed in the Calendar screen as planned events.

For more information on entering call details, see [“Recording Contact Calls” on page 124](#).

NOTE: Before user can enter information about products detailed, samples, and promotional items dropped during a contact call, they must set up their personal lists. For more information, see [“Creating a Personal List” on page 82](#).

To add a contact call from the Activities screen

- 1** Navigate to the Activities screen.
- 2** From the Show drop-down list, select My Activities.
- 3** In the Activities list, click New Contact Call.
- 4** In the Contact Call form, add a record and complete the necessary fields.

Some of the fields in the Contact Call record are described in the following table.

Field	Comments
Cost	The cost you want to include the call in an expense report generated by Siebel Expenses. Also do the following before submitting the call: <ul style="list-style-type: none"> ■ Specify the actual start time for the call. ■ Check the Expense flag for the call in the My Activities view. For more information, see “Adding a General Activity” on page 99.
Last Name	The contact to be visited during this call. Make a selection from the Pick Contact dialog box and click OK.
Ref #	A reference number for this call. This reference number becomes the transaction number (Transaction # field) for a samples transaction corresponding to this call. For information on samples transactions, see Chapter 6, “Managing Samples.”

Field	Comments
Smart Call	<p>The Smart Call template to be associated with this call. Make a selection from the Pick Smart Call dialog box.</p> <p>A Smart Call is a template that you apply to contact calls that defines information about the products detailed, samples and promotional items distributed, and issues discussed on a call. Once you apply a Smart Call template to a call, you can make additional edits any fields in the Contact Call Detail view. For more information on Smart Calls, see Chapter 8, “Creating Smart Calls.”</p>
Status	<p>The status of this call. The default value is Planned. This value changes to Synchronized after synchronization.</p> <p>Be aware, you cannot select the value Submitted. To change the status of the call to Submitted, you must submit the call. For more information, see “To submit a completed contact call” on page 128.</p>

For more information on how to enter information in Call Products Detailed, Sample Products Dropped, Promotional Items Dropped, and Issues lists, see [“Recording Contact Calls” on page 124.](#)

NOTE: If you applied a Smart Call to the call (as described in [Step 4](#)), you may only need to verify that all the information in the four lists is accurate.

To automatically schedule a contact call using the Schedule button

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact.
- 4 Click the Schedule button.

The Auto Schedule dialog box appears, displaying the date range specified on the best-times-to-call information on the Addresses view tab.

- 5 In the Auto Schedule dialog box, review the displayed values, make any needed changes, and click OK.

NOTE: The auto-scheduling function does *not* check for scheduling conflicts. Therefore, users need to verify that automatically scheduled calls do not conflict with other activities in their calendar.

To manually schedule a contact call in the Calls view tab

- 1 Navigate to the Contacts screen.
- 2 From the Show drop-down list, select My Contacts.
- 3 In the Contacts list, select a contact.

NOTE: When selecting the contact, do not click a hyperlink (underlined field), or you will go to another view.

- 4 Click the Calls view tab.
- 5 In the Call list, add a record and complete the necessary fields.

NOTE: You cannot change the call's Status field to Submitted from this view. To change the status of the call to Submitted, you must submit the call. For more information, see [“To submit a completed contact call” on page 128](#).

- 6 To go to the Contact Call Detail view, drill down on the date hyperlink in the Start Date field.

The Contact Call Detail view appears.

For more information on recording calls, see [“Recording Contact Calls” on page 124](#).

To schedule a contact call in the Calendar

- 1 Navigate to the Calendar screen.
- 2 From the Show drop-down list, select My Calendar.

The My Daily Calendar view appears, displaying the current date.

- 3 Select either the My Daily or My Weekly view tab.

- 4 Navigate to the day on which you want to schedule the call and click New Contact Call.

The Contact Call Detail view appears.

For more information on recording calls, see [“Recording Contact Calls” on page 124](#).

Creating an Account Call

End users track details about calls made on specific accounts with account call records. An account call is a type of activity record. Although users can create and display account calls on the Accounts screen, they enter details about the actual call on the Activities screen. Also, as activities, account call records can also be viewed in the Calendar screen.

For more information, entering call details see [“Recording Account Calls” on page 129](#).

NOTE: Before users can enter information about products detailed, attendees, and activities associated with an account call, they must set up their personal lists. For more information, see [“Creating a Personal List” on page 82](#).

To add an account call from the Activities screen

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select My Activities.
- 3 In the Activities list, click New Acct Call.

4 In the Account Call form, add a record and complete the necessary fields.

Some of the fields in the Account Call record are described in the following table.

Field	Comments
Account	The account to be visited during this call. Make a selection from the Pick Account dialog box. Click the select button to choose an account and then click OK.
Cost	Enter a cost if you want to include the call in an expense report generated by Siebel Expenses. Also do the following before submitting the call: <ul style="list-style-type: none"> ■ Specify the actual start time for the call. ■ Check the Expense flag for the call in the My Activities view. For more information, see “Adding a General Activity” on page 99.
Site	A unique location identifier that distinguishes this account from any other accounts with the same name.
Smart Call	The Smart Call template to be associated with this call. Make a selection from the Pick Smart Call dialog box. A Smart Call is a template that you apply to contact calls that defines information about the products detailed, samples and promotional items distributed, and issues discussed on a call. Once you apply a Smart Call template to a call, you can make additional edits any fields in the Account Call Detail view. For more information on Smart Calls, see Chapter 8, “Creating Smart Calls.” Users can apply a Smart Call that includes products not included in their personal lists. Keep in mind, however, that users who do this will see a warning message. To continue and apply the Smart Call template, click OK.
Status	The status of this call. The default value is Planned. You cannot select the value Submitted. To change the status of the call to Submitted, you must submit the call. For more information, see “To submit a completed account call” on page 133 .

For information on how to enter information in the Call Products Detailed, Attendees, and Activities lists, see [“Recording Account Calls” on page 129](#).

NOTE: If you applied a Smart Call to the call (as described in [Step 4](#)), you may only need to verify that all the information in the four lists is accurate.

To automatically schedule an account call using the Schedule button

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account and click Schedule.

The Auto Schedule dialog box appears, displaying the date range specified on the best-times-to-call information on the Account Profile view tab.

- 4 In the Auto Schedule dialog box, review the displayed values, make any needed changes, and click OK.

NOTE: The auto-scheduling function does *not* check for scheduling conflicts. Therefore, users need to verify that automatically scheduled calls do not conflict with other activities in their calendar.

To manually schedule an account call in the Account view tab

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting an account, do not click a hyperlink (underlined field), or you will go to another view.

- 4 Click the Calls view tab.
- 5 In the Calls list, add a record and complete the necessary fields.

NOTE: You cannot change the Status field to Submitted from this view. To change the status of the call to Submitted, you must submit the call. For more information, see [“To submit a completed account call” on page 133](#).

To enter details about the call, drill-down on the Date hyperlink in the Date field to display the Account Call Detail view.

For more information on recording calls, see [“Recording Account Calls” on page 129](#).

To add an account call using the New Call button

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting an account, do not click a hyperlink (underlined field), or you will go to another view.

- 4 In the More Info view tab, click New Call.

The Account Call Detail view of the Activities screen appears. The selected account automatically appears in the Account Call form.

For more information on recording calls, see [“Recording Account Calls” on page 129](#).

To schedule an account call in the Calendar

- 1 Navigate to the Calendar screen.
- 2 From the Show drop-down list, select My Calendar.
The My Daily Calendar view appears, displaying the current date.
- 3 Select either the My Daily or My Weekly view tab.
- 4 Navigate to the day on which you want to schedule the call and click New Acct Call.

The Account Call Detail view appears.

For more information on recording calls, see [“Recording Account Calls” on page 129](#).

Planning Calls

End-User Procedures

This chapter describes how to record account and contact calls in Siebel Life Sciences. For more information on planning account and contact calls, see [Chapter 4, “Planning Calls.”](#)

Using the procedures given in this chapter you will be able to perform the end-user tasks of recording contact and account calls. For more information on end-user tasks associated with recording calls, see [“End-User Procedures” on page 124.](#)

Contact and account calls are both types of activity records. Although users can create contact and account calls in the Activities screen, they can only record the details of calls in the Activities screen. For more information on creating calls, see [“Creating a Contact Call” on page 108](#) and [“Creating an Account Call” on page 112.](#)

Understanding the Submit Button

Clicking the Submit button in Siebel Life Sciences causes a number of important events to occur within the application. [Table 6](#) describes the specific actions that occur when clicking the Submit button in the view listed in the left column.

Table 6. Effects of the Submit Button on Siebel Life Sciences Views

View	Access Path	Transaction Type	Clicking the Submit Button...
Contact Call Detail	Activities > Contact Call Detail	Disbursement	<p>Changes the Contact Call detail Status field to Submitted.</p> <p>Except for the Comment field, sets the record to read-only.</p> <p>Sets all child records to read-only.</p> <p>If samples were dropped, creates a Samples Transaction History record.</p>
Inventory Count	Samples > Inventory Count		<p>Verifies each a value has been entered in the Count field.</p> <p>Changes the status of each record to inactive.</p> <p>Creates a an active transaction by moving the count in the latest inventory period.</p>
Received Samples	Samples > My Received Samples	Transfer In	<p>Updates the user inventory to reflect the quantity entered in Received Quantity field of the Line Items list.</p> <p>Updates Sample Invoices by setting the Active flag to N (No).</p> <p>If the Invoice Status is submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y (Yes) ■ Updates the Stock Position ID ■ Changes the Item Status to Submitted

Table 6. Effects of the Submit Button on Siebel Life Sciences Views

View	Access Path	Transaction Type	Clicking the Submit Button...
Sample Order	Samples > My Samples Order	Sample Order	<p>Updates the Samples Orders list by setting the Active flag to N (No).</p> <p>If the Order Status is submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y (Yes) ■ Updates the Stock Position ID ■ Changes the Item Status to Submitted
Samples Adjustments	Samples > My Samples Adjustments	Inventory Adjustment	<p>Updates the user inventory to reflect the quantity entered in Quantity field of the Line Items list.</p> <p>Updates Sample Adjustments by changing the Active flag to N (No).</p> <p>If the Transfer Status is Submitted, the application updates Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y (Yes) ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted

Table 6. Effects of the Submit Button on Siebel Life Sciences Views

View	Access Path	Transaction Type	Clicking the Submit Button...
Sent Samples	Samples > My Sent Samples	Transfer Out	<p>Updates the user inventory to reflect the quantity entered in Line Items list Quantity field.</p> <p>Updates My Sent Samples by setting the Active Flag to N (No), Changes the Status to Submitted.</p> <p>If the Transfer Status is Submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Update Flag to Y (Yes) ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted

When a user clicks the Submit button in either the Contact Call Detail and Account Call Detail views, the application verifies that:

- At least one product has been recorded and detailed.

This requirement can be changed by the administrator. For more information, see [Appendix A, “Information for Siebel Application Developers.”](#)
- The call’s date and time is the same as or earlier than the current date and time. A call cannot be submitted with a future date.

If dropped samples are recorded for the call, the application checks that:

- The Ref# field is not empty.
- The samples exist in the inventory for the period indicated by the call’s date and time.
- The period into which the samples will be recorded is an unreconciled period. If it is a reconciled period, a warning message appears.
- A valid lot number has been specified for dropped samples tracked by lot number.

If the call passes these checks, the application:

- Creates a samples disbursement transaction, with a line item for each dropped sample recorded for the call.
- Submits a disbursement transaction to update the samples inventory. If the submission of the disbursement transaction is successful, the application changes the call's Status field to Submitted.
- Sets the Last Call Date field for the contact or account to the date of the submitted call, and many fields in the call record become read-only.

The Siebel administrator can change the fields that become read-only after a call is submitted (or synchronized with Siebel ePharma Handheld on a PDA). For information, see [Appendix A, "Information for Siebel Application Developers."](#)

NOTE: If attendees are recorded in an account call, an attendee call is created for each attendee, and the process described above is performed for each attendee call. Attendee calls are the same as contact calls except that they do not appear in the Activities view and they are submitted automatically when the account call is submitted.

Business Scenario for Recording Calls

This section outlines an example workflow performed by an end user when recording contact and account calls. Your company may follow a different workflow according to its business requirements.

A sales representative for a pharmaceutical company has just finished a busy day of customer calls. Having made several important calls, it is important that he records the information while it is still fresh in his memory. Critical issues were discussed that could influence prescription output, especially in relation to indications.

In the late afternoon, he loads Siebel Life Sciences so he can record all his call activities. First, he records six contact calls he made in the morning by entering information about the products he discussed with each physician, the order in which the products were discussed and the indications for which the products were promoted. Then, he records information relating to samples delivered to the physicians during the call, including details such as the lot number, if required, and the quantity. As part of a special campaign the representative also delivered promotional items, which he also records as part of the call information. Finally, he logs any issues the contact raised during the call so he can follow up on them prior to his next visit.

Using the procedures given in this chapter you will be able to perform the end-user tasks of recording contact and account calls.

Example Workflow for Recording Calls

This section details sample tasks often performed by end-users when recording contact and account calls. Your company may follow a different workflow according to its business requirements.

NOTE: Prior to recording calls, end users need to set up and update their personal lists, create target lists and route plans, and add activities. For more information, see [Chapter 4, “Planning Calls.”](#)

The following list shows tasks end users typically perform when recording contact and account calls. These tasks are typically performed in the following order:

- 1 Review the call plan for the day.**
- 2 Visit contacts and accounts.**
- 3 Record contact calls.** For more information, see [“Recording Contact Calls” on page 124.](#)
- 4 Record account calls.** For more information, see [“Recording Account Calls” on page 129.](#)

For more information on the tasks associated with recording calls, see [“End-User Procedures” on page 124.](#) For more information on planning calls and setting up meetings, see [Chapter 4, “Planning Calls”](#) and [“Setting Up a Meeting” on page 104.](#)

End-User Procedures

The following end-user procedures are described in this section:

- Recording contact calls:
 - [To display the Contact Call Detail view on page 125](#)
 - [To record information about products detailed on page 126](#)
 - [To record information about samples dropped on page 126](#)
 - [To record information about promotional items dropped on page 127](#)
 - [To record information about decision issues discussed during the call on page 128](#)
 - [To submit a completed contact call on page 128](#)
- Recording account calls:
 - [To enter products detailed information for an account call on page 130](#)
 - [To enter attendee information for an account call on page 131](#)
 - [To enter general activities for an account call on page 133](#)
 - [To submit a completed account call on page 133](#)

Recording Contact Calls

End users track details about calls made on a contact with contact call records. Although users can create and display contact calls on the Contacts screen, they enter details about the actual call on the Activities screen. To record a contact call, users must complete the following procedures:

- Display the Contact Call Detail view
- Enter information on products detailed
- Enter information about samples dropped (optional)
- Enter information about promotional items dropped (optional)

- Record any decision issues (optional)
- Submit the call

NOTE: End users can view all activities, contacts, and opportunities associated with an account and its child accounts on the account hierarchy tree. For more information, see [Chapter 7, “Administering and Managing Accounts.”](#)

The sections that follow explain how to perform each of these tasks.

To display the Contact Call Detail view

- 1 Select an existing contact call:
 - From the Activities screen:
 - Navigate to the Activities screen.
 - From the Show drop-down list, select My Activities.
 - In the Activities list, select an existing contact call and then drill-down on the Activity field.
 - From the Contacts screen:
 - Navigate to the Contacts screen.
 - From the Show drop-down list, select My Contacts.
 - In the Contacts list, select a contact and then click the Calls view tab.
 - In the Start Date field of the Calls list, drill-down on the date hyperlink of the call for which you want to add information.

NOTE: For more information on scheduling and creating contact calls, see [“Creating a Contact Call” on page 108.](#)

The Contact Call Detail view appears.

- 2 Enter information about the products detailed as described in the following procedure.

To record information about products detailed

- 1 Display the Contact Call Detail view. For more information, see [“To display the Contact Call Detail view” on page 125.](#)

NOTE: If you have not yet set up your personal lists, you must do so before you can proceed with the next step. For more information, see [“Creating a Personal List” on page 82.](#)

- 2 In the Call Product Detailed list, add a record for each product discussed during the call and complete the necessary fields.

Some fields in the Call Product Detail are described in the following table.

Field	Comments
Indication	The purpose or therapeutic area for which a drug is designed.
Priority	Priority of this product relative to others discussed during the call. Note that this field can be configured to automatically assign 1 to the first record and then sequentially number each additional record. For more information, see Appendix A, “Information for Siebel Application Developers.”
Product	The product detailed during the call. The products appearing in this drop-down list are based on the products added to your Personal list. For more information on adding products to your personal lists, see “Creating a Personal List” on page 82.

Enter information about dropped samples as described in the following procedure.

To record information about samples dropped

- 1 Display the Contact Call Detail view. For more information, see [“To display the Contact Call Detail view” on page 125.](#)
- 2 In the Contact Call form, enter a reference number (if required) in the Ref # field.

- 3 In the Samples Dropped list, add a record for each product dropped during the call and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Lot #	The lot number (if applicable) of the products dropped during the call. If tracking samples by lot number, select a lot number in the Pick Lot dialog box. For more information, see “Defining Lot Numbers” on page 148.
Name	The name of the products dropped during the call. The products appearing in this drop-down list are based on the products available in your samples inventory. For more information on samples, see Chapter 6, “Managing Samples.”
Quantity	The quantity of sample dropped during the call.

NOTE: If the sample you dropped does not appear in the Name field drop-down list, either you need to add it to the Personal Samples list or the sample has not been defined as a product. For information about adding products to the Personal Samples list, see [To add a product to a personal list on page 83](#). It is the responsibility of your administrator to define products.

Enter information about dropped promotional items as described in the following procedure.

To record information about promotional items dropped

- 1 Display the Contact Call Detail view. For more information, see [“To display the Contact Call Detail view” on page 125.](#)

- 2 In the Promotional Items Dropped list, add a record for each item dropped during the call and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	The promotional item dropped during the call. The items appearing in this drop-down list are based on items added to your Personal Promotional Items list. For more information, see “Creating a Personal List” on page 82.
Quantity	The quantity of the promotional item dropped during the call.

Enter information about decision issues discussed as described in the following procedure.

To record information about decision issues discussed during the call

- 1 Display the Contact Call Detail view. For more information, see [“To display the Contact Call Detail view” on page 125.](#)
- 2 In the Issues list, add a record for each issue discussed during the call and complete the necessary fields.

NOTE: Decision issues are the objectives a contact may raise when evaluating a product before making a prescribing decision. For more information, see [“Defining Decision Issues” on page 405.](#)

If no further changes should be made to the call, submit the call as described in the following procedure.

To submit a completed contact call

- 1 Display the Contact Call Detail view. For more information, see [“To display the Contact Call Detail view” on page 125.](#)

NOTE: You cannot submit a call with a future date.

- 2 Verify that all information in the Contact Call Detail view is accurate and complete. For more information, see:
 - [To record information about products detailed on page 126](#)
 - [To record information about samples dropped on page 126](#)
 - [To record information about promotional items dropped on page 127](#)
 - [To record information about decision issues discussed during the call on page 128](#)

NOTE: Once you submit a call, you cannot modify any fields except the Comment field. However, using Siebel Tools, the Siebel administrator can change this default behavior and configure which fields are editable. For more information, see *Siebel Tools Reference*.

- 3 If you dropped samples when making the call, verify that you entered a samples reference number (if required) in the Ref# field in the Contact Call form.

CAUTION: If you are a mobile user, submit your calls *before* connecting to the server, and then synchronize. Mobile users should *not* submit calls while connected to the server or they run the risk of introducing errors into their inventory counts.

- 4 In the Contact Call form, click Submit.

Recording Account Calls

End users track details about calls made on an account with account call records. Although users can create and display account calls on the Accounts screen, they enter details about the actual call on the Activities screen. To record an account call, users must complete the following procedures:

- Display the Account Call Detail view
- Enter information on products detailed
- Enter attendee information (the names of contacts met and any samples dropped)

- Enter information about any activities related to the call (optional)
- Submit the call

The sections that follow explain how to perform each of these tasks.

To display the Account Call Detail view

1 Select an existing account.

- From the Activities screen:
 - Navigate to the Activities screen.
 - From the Show drop-down list, select My Activities.
 - In the Activities list, select an existing account call and then drill-down on the Activity field.
- From the Accounts screen:
 - Navigate to the Accounts screen.
 - From the Show drop-down list, select My Accounts.
 - In the Accounts list, select an account and then click the Calls view tab.
 - In the Start Date field of the Calls list, drill-down on the date hyperlink of the call for which you want to add information.

The Account Call Detail view appears.

2 Enter information about the products detailed as described in the following procedure.

To enter products detailed information for an account call

1 Display the Account Call Detail view. For more information, see [“To display the Account Call Detail view” on page 130](#).

NOTE: You must set up your personal lists before you can complete this procedure. For more information, see [“Creating a Personal List” on page 82](#).

- 2 In the Call Products Detailed list, add a record for each product detailed during the call and complete the necessary fields.

Some fields in the Call Products Detailed record are described in the following table.

Field	Comments
Indication	The purpose or therapeutic area for which a drug is designed.
Priority	Priority of this product relative to others discussed during the call. Note: This field can be configured to automatically assign 1 to the first record and then sequentially number each additional record. For more information, see Appendix A, "Information for Siebel Application Developers."
Product	The product detailed during the call. The products appearing in this drop-down list are based on the products added to your Personal list. For more information on adding products to your personal lists, see "Creating a Personal List" on page 82.

Enter attendee information as described in the following procedure. Attendees may include both contacts and employees.

To enter attendee information for an account call

- 1 Display the Account Call Detail view. For more information, see ["To display the Account Call Detail view" on page 130.](#)
- 2 In the Attendees list, click New.

The Add Attendee dialog box appears displaying contacts and employees. For more information, see ["Indicating an Affiliation Between an Account and a Contact" on page 200.](#)
- 3 In the Add Attendee dialog box:
 - If no contacts appear, click All Contacts.
 - To only display contacts affiliated with the selected account, click Affiliate Contacts.

- Select those contacts and employees that you want to add as attendees and click OK.

The application creates an attendee call record (similar to a contact call) for each contact you include as an attendee of the account call. These attendee call records are child records of the account call and appear in the Activities screen under each contact's name.

NOTE: You must set up your personal lists before you can complete the next step. For more information, see [“Creating a Personal List” on page 82](#).

- 4 In the Samples Dropped field, click the select button.
- 5 When the Samples Dropped dialog box appears, select a product from the Name drop-down list and then complete the Lot # and Quantity fields.

NOTE: The items appearing in the Name drop-down list are based on items added to your Personal Promotional Items list. For more information, see [“Creating a Personal List” on page 82](#).

- 6 If samples were dropped during the call, enter a reference number in the Samples Reference Number field of the Attendees list.

This reference number becomes the transaction number (Transaction # field) for a samples transaction corresponding to this call. For information on samples transactions, see [“Managing Samples” on page 135](#).

- 7 Drill down on the Name field for each attendee added to the account call.

The Contact Call Detail view appears, displaying the child attendee call you created by adding the contact as an attendee of the account call.

- 8 In the Contact Call Detail view enter any relevant information. For more information, see the procedure [“To display the Contact Call Detail view” on page 125](#).

NOTE: To return to the parent account call in the Account Call Detail view, click the arrow to the left of the Favorites drop-down list.

To enter general activities for an account call

- 1 Display the Account Call Detail view. For more information, see [“To display the Account Call Detail view” on page 130](#).
- 2 Scroll down to the Activities list.
- 3 In the Activities list, add a record and complete the necessary fields.
For more information, see the field descriptions in [“To add a general activity” on page 99](#).
- 4 If no further changes should be made to the call, submit the call as described in the following procedure.

To submit a completed account call

- 1 Display the Account Call Detail view. For more information, see [“To display the Account Call Detail view” on page 130](#).

NOTE: You cannot submit a call with a future date.

- 2 Verify that all information in the Account Call Detail view is accurate and complete. For more information, see:
 - [To enter products detailed information for an account call on page 130](#)
 - [To enter attendee information for an account call on page 131](#)
 - [To enter general activities for an account call on page 133](#)

CAUTION: If you are a mobile user, submit your calls *before* connecting to the server, and then synchronize. Mobile users should *not* submit calls while connected to the server or they run the risk of introducing errors into their inventory counts.

- 3 In the Account Call form, click Submit.

NOTE: Be aware that once you submit a call you cannot modify any fields except the Comment field. However, using Siebel Tools, you can change this default behavior and configure which fields are editable. For more information, see *Siebel Tools Reference*.

Recording Calls

End-User Procedures

Most pharmaceutical manufacturers provide free samples to health care professionals in an effort to influence the prescribing habits of physicians and accounts across the United States and the world. In the United States, samples distribution is regulated by the FDA and must be reconciled at least once a year.

This chapter describes how to manage and maintain an electronic inventory of samples and promotional items using Siebel ePharma Samples Management. Using the procedures given in this chapter, you will be able to perform the administrator tasks of setting up and maintaining a home-office master inventory (optional) and monitoring samples disbursements, orders, transfers, receipts, discrepancies, adjustments, and inventory counts. End users use the Samples Management screens to track an electronic inventory of samples stock, create samples request order and transfers, acknowledges receipt of samples transfers, and adjust inventory balances for reconciliation purposes.

Siebel Samples Management allows sales representatives and administrators to measure and monitor sample disbursements at every level throughout the organization. For more information on the differences between administrator and end-user tasks see [“Business Scenarios” on page 140](#).

Understanding Samples Transactions

Siebel Samples Management maintains a samples transaction record for every sample transfer, receipt, disbursement, order, and inventory adjustment. The application assigns each samples transaction record a unique identifier for tracking purposes. Depending on the type of transaction, you can display this identifier as a transaction number, an order number, an invoice number, or a transfer number.

Each samples transaction record represents a single transaction consisting of one or more line items. As shown in [Figure 1](#), the application tracks a transfer of multiple samples as a single transaction record with multiple corresponding line item records—one line item for each type of product transferred. These line item records are child records of the parent transaction record.

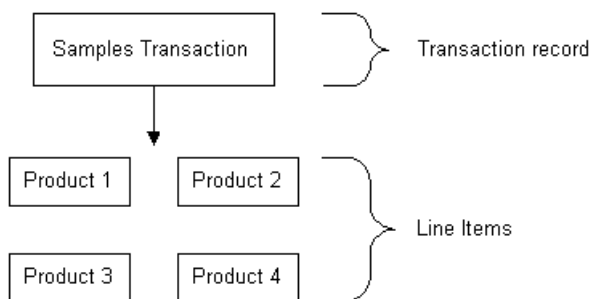


Figure 1. Transaction Record and Line Item Relationship

Inventory Reconciliation

In the United States, pharmaceutical companies may request that sales representatives perform an inventory reconciliation from one to twelve times a year to remain compliant with the Prescription Drug Marketing Act (PDMA). (Sampling regulations vary significantly in North America, Europe, Asia, and Latin America.) If sales representatives' physical sample inventories do not match their disbursement and transaction histories, they may perform inventory adjustments to justify the discrepancies. For more information, see [“Reconciling an Inventory Period” on page 173](#).

It is also possible to create sample products by lot numbers and to disburse samples to contacts by lot numbers and yet not reconcile by lot numbers. For more information, see [“Reconciling an Inventory Period” on page 173](#).

PDMA Compliance and Lot Numbers

Companies in the United States may need to perform additional tasks to meet PDMA requirements. According to the Food and Drug Administration’s Final Ruling of December 3, 1999 (21 CFR Part 203 and 205), samples must also be tracked by lot number to the level of disbursement. Siebel Samples Management provides additional functionality that allows you to meet this lot number tracking requirement. For more information on using lot numbers, see [“How a Samples Transaction Works” on page 146](#).

Inventory Periods

Since samples inventory reconciliation can happen as often as once a month, Siebel Samples Management allows you to reconcile as often as you like and provides three types of inventory periods for maximum flexibility. These period types are described in [Table 7](#).

Table 7. Samples Inventory Periods

Period Type	Description
Active	The current period; it shows no end date and it is not reconciled. You can enter any type of samples transaction, including adding new products; inventory counts will be adjusted accordingly.
Inactive	A past, unreconciled period; it shows an end date but has not been reconciled yet. Except for adding new products into inventory, you can enter any type of samples transaction; inventory counts will be affected accordingly. The default application configuration provides one inactive period, but can be configured for multiple instances.
Reconciled	A past, inactive period; it shows an end date and has been reconciled. Although you can enter samples disbursements for a reconciled period, the inventory counts for the active period will not be affected.

The default Siebel Samples Management configuration provides two unreconciled periods: one active period and one inactive period. The Siebel administrator can control the number of unreconciled periods allowed. For more information, see [“Reconciling an Inventory Period” on page 173](#).

How Siebel Samples Management Works with Calls

This section describes how Siebel Samples Management works with the Contact Call Detail and Account Call Detail views. For more information on recording calls, see [Chapter 5, “Recording Calls.”](#)

When you click the Submit button in either the Contact Call Detail and Account Call Detail views, the application verifies that:

- At least one product has been recorded and detailed.

This requirement can be changed by the administrator. For more information, see [Appendix 2, “.”](#)

- The call’s date and time is the same as or earlier than the current date and time. A call cannot be submitted with a future date.

If dropped samples are recorded for the call, the application checks that:

- The Ref# field is not empty.
- The samples exist in the inventory for the period indicated by the call’s date and time.
- The period into which the samples will be recorded is an unreconciled period. If it is a reconciled period, a warning message appears.
- A valid lot number has been specified for dropped samples tracked by lot number.

NOTE: When the Lots for Disperse Only system preference is set to TRUE, the lot number is not required. For more information, see [“Managing Inventory Tracking and Reconciliation Without Lot Numbers”](#) on page 154.

If the call passes these checks, the application:

- Creates a samples disbursement transaction, with a line item for each dropped sample recorded for the call.
- Submits a disbursement transaction to update the samples inventory. If the submission of the disbursement transaction is successful, the application changes the call's Status field to Submitted.
- Sets the Last Call Date field for the contact or account to the date of the submitted call, and many fields in the call record become read-only.

As an administrator, you can change the fields that become read-only after a call is submitted (or synchronized with Siebel ePharma Handheld on a PDA). For information, see [Appendix 2, “](#)

NOTE: If attendees are recorded in an account call, an attendee call is created for each attendee, and the process described above is performed for each attendee call. Attendee calls are the same as contact calls except that they do not appear in the Activities view and they are submitted automatically when the account call is submitted.

Business Scenarios

This section outlines three scenarios that are examples of workflows performed by a samples administrator and the sales representatives who distribute samples to health care professionals. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company has new products to bring to market. To set up a samples inventory, the samples administrator adds the products to the database, associates any lot numbers, and transfers samples to the managers and sales representatives in the field. Once sales representatives and managers receive the samples, they add them to their personal lists so they are available options in their call reporting. The sales representatives then visit the doctors in their territories and drop the new samples. After a month goes by, each sales representative is required to reconcile his or her inventory. One sales representative realizes there are some discrepancies in her inventory. After she makes the needed adjustments, she reconciles her inventory and starts a fresh inventory period.

Business scenarios discussed in this chapter include:

- **Administrator Establishes a Master Inventory.** The Siebel samples administrator establishes and transfers inventory to end users.
- **Administrator and End Users Establish a Master Inventory.** The Siebel samples administrator and the end user establish an initial inventory and then reconcile it before they disburse any samples.
- **Users Transfer Samples to One Another.** Describes the basic workflow of how users can exchange samples inventory within the system.

Using the procedures described in this chapter, sales representatives can track their samples inventories, record inventory transfers, and track lost or damaged inventory. However, to record samples disbursements, sales representative should use the procedures described in [Chapter 5, “Recording Calls.”](#)

Administrator Establishes a Master Samples Inventory

In this scenario, samples administrators are responsible for their company's samples inventory and making sure it complies with regulatory rules and regulations. In this role, they take the responsibility for establishing a master samples inventory and then transferring samples to each end user.

Having the samples administrator establish a master inventory and then transfer samples to each end user is a simpler process from the end user's perspective. Once the samples administrator establishes the master inventory, the next step is to transfer inventory to each end user. When each recipient electronically receives the shipment, they submit a receipt and application automatically enters the received samples into their inventory counts.

Once the samples administrator establishes the master inventory, the next step is to transfer inventory to each end user. When each recipient electronically receives the shipment, they submit a receipt and the application automatically enters the received samples into their inventory counts.

In this workflow, the representative, the representative's manager, and the samples administrator can monitor discrepancies between shipped quantities and received quantities.

Administrator Procedures

The samples administrator requires administrative responsibilities in Siebel Samples Management to:

- **Define samples as products.** For more information, see [Chapter 18, "Managing Products."](#)
- **Define lot numbers (optional).** For more information, see ["Defining Lot Numbers" on page 148.](#)
- **Set up and reconcile initial master inventory.** For more information, see ["Establishing an Initial Inventory" on page 152.](#)
- **Transfer inventory to end users.** For more information, see ["Creating a Samples Transfer" on page 158.](#)

- **Monitor samples activities.** Activities for samples include disbursements, orders, transfers between employees, user inventory counts, and inventory adjustments. For more information, see [“Monitoring Samples Activities” on page 160.](#)
- **Manage electronic signatures.** For more information, see [“Checking Electronic Signatures” on page 166.](#)
- **Identify sample locations in the event of recalls.** Follow your company’s guidelines for managing sample recalls.

End-User Procedures

The end users are the sales representatives who distribute samples to health care professionals. They enter information to:

- **Acknowledge receipt of the inventory transfers.** For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171.](#)
- **Add inventory to personal lists.** For more information, see [“Creating a Personal List” on page 82.](#)
- **Use the new samples in regular call reporting.** For more information, see [Chapter 5, “Recording Calls.”](#)
- **Transfer samples to other end users.** Sales representatives exchange samples among themselves. For more information, see [“Creating a Samples Transfer” on page 158.](#)
- **Request more samples.** For more information, see [“Creating a Samples Order” on page 170.](#)
- **Perform inventory adjustments.** For more information, see [“Adjusting a Past Samples Transaction” on page 162.](#)
- **Reconcile inventory periods as needed.** For more information, see [“Reconciling an Inventory Period” on page 173.](#)

Administrator and End Users Establish a Master Inventory

In this scenario, both the samples administrator and the end user establish a master samples inventory or inventory count. Samples administrators are again responsible for their company's samples inventory and making sure it complies with regulatory rules and regulations.

From a process perspective, this workflow requires more steps for the end user since they must first establish an initial inventory and then reconcile it before they can disburse any samples. For more information, see [“Disabling Lot Number Tracking” on page 151](#).

Administrator Procedures

Samples administrators requires administrative responsibilities in Siebel Samples Management to:

- **Define samples as products.** Product inventory is maintained in the database. For more information, see [Chapter 17, “Managing Clinical Projects.”](#)
- **Optional: Define lot numbers.** Samples may be tracked by lot numbers For more information, see [“Defining Lot Numbers” on page 148](#).
- **Set up and reconcile initial master inventory.** This step is required only if you are not using a third-party system to populate the samples inventory. For more information, see [“Establishing an Initial Inventory” on page 152](#).
- **Monitor samples activities.** Samples activities that are monitored include disbursements, orders, transfers between employees, user inventory counts, and inventory adjustments. For more information, see [“Monitoring Samples Activities” on page 160](#).
- **Check electronic signatures.** Regularly check Signature Audit Administration to verify that signatures collected from contacts are consistent. For more information, see [“Checking Electronic Signatures” on page 166](#).
- **Identify sample locations in the event of recalls.** Follow your company's guidelines for managing sample recalls.

End-User Procedures

The end users are the sales representatives who distribute samples to health care professionals. They enter information to:

- **Set up and reconcile initial master inventory.** For more information, see [“About Establishing an Initial Inventory Count” on page 169.](#)
- **Add inventory to personal lists.** For more information, see [“Creating a Personal List” on page 82.](#)
- **Use the new samples in regular call reporting.** For more information, see [Chapter 5, “Recording Calls.”](#)
- **Transfer samples to other end users.** Sales representatives exchange samples among themselves. For more information, see [“Creating a Samples Transfer” on page 158.](#)
- **Acknowledge receipt of the inventory transfers.** End users must acknowledge receipt of a samples transfer transaction before the transfer can be completed. For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171.](#)
- **Perform counts and adjustments.** For more information, see [“Adjusting a Past Samples Transaction” on page 162.](#)
- **Reconcile inventory periods as needed.** For more information, see [“Reconciling an Inventory Period” on page 173.](#)

Users Transfers Samples to One Another

This scenario describes the basic process for exchanging inventory with other users within the system. This process can be used by both the administrator and end users to exchange samples. When a user creates a samples transfer to move inventory to another user, the recipient electronically receives a shipment of samples. Once the recipient submits a receipt for that shipment, the application automatically enters the received samples into their inventory counts.

Figure 2 illustrates this process.

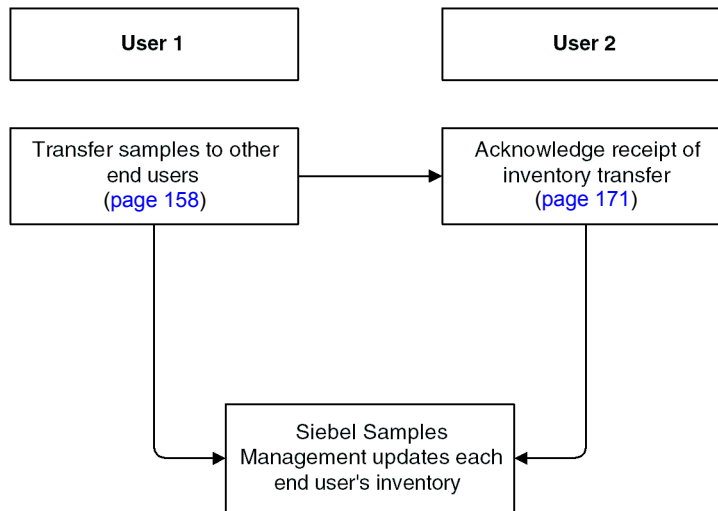


Figure 2. Workflow for Users to Transfer Samples to One Another

Administrator Procedures

The following administrator procedures are described in this section:

- [To define lot numbers on page 149](#)
- [To disable lot number tracking for samples on page 151](#)
- [To add products to inventory and submit an initial count on page 153](#)
- [To track and reconcile inventory without lot numbers on page 155](#)
- [To create and submit initial count adjustments on page 155](#)
- [To reconcile the initial inventory period on page 157](#)
- [To create a samples transfer on page 158](#)
- [To access monitor samples activities on page 160](#)
- [To add a product to a samples transaction on page 163](#)
- [To adjust a quantity in a samples transaction on page 165](#)
- [To display Signature Audit Administration on page 166](#)
- [To display Sample Event Administration on page 167](#)
- [To display the Disclaimer Administration screen on page 167](#)

NOTE: Before you can set up Siebel Samples Management, you must first define your products. For more information, see [Chapter 18, “Managing Products.”](#)

How a Samples Transaction Works

In the default configuration, Siebel Samples Management supports two open inventory periods. The samples administrator can override this default behavior by adding additional open periods using Siebel Tools. When users click the Submit button for a samples transaction, the system checks that transaction date and time to determine the inventory period into which the transaction should be entered.

For all transactions except receipts, the application enters the transaction into the inventory period that includes the transaction's date and time. If no such period exists, the transaction submission fails.

If the situation involves samples receipts (that is, received samples transactions displayed in the Samples Receipts screen) and no inventory period exists that includes the transaction's date and time, Siebel Samples Management creates a new inventory period.

For example, this situation might happen during initial deployment, before any inventory periods have been opened. The new period's start date and time are set to the invoice receipt's date and time. However, the application first checks whether any pending transaction has an earlier transaction date than the one being submitted. This is done to prevent any impasse that might occur if a second invoice receipt is later submitted with an earlier transaction date.

NOTE: Once the first inventory period has been created, another period with an earlier start date and time cannot be created.

Submitted samples transactions impact inventory counts in the following ways:

- Samples orders are independent of inventory periods because they have no effect on inventory counts.
- Receipts (transactions whose Type field is either Transfer In or Receipt) are added to the submitter's inventory counts.
- Samples transfers (transactions whose Transfer Type or Transaction Type field is Transfer Out or Return) are subtracted from the submitter's current inventory counts. In addition, a corresponding invoice receipt is created for the receiving party.

NOTE: Typically, samples returns (samples transfers whose Transfer Type field is Return) are expired products that are sent back to the home office to be destroyed. Samples returns are *not* added back into the home office's master inventory counts. The samples administrator can track samples returns by using the Sent Samples administration view or the Samples History administration views and querying for those samples transactions with a type equal to Return.

- Samples adjustments (transactions whose Transaction Type field is Inventory Adjustment) are either added to or subtracted from the submitter's inventory counts. Samples adjustments are the only type of samples transaction in which negative quantities are allowed.

In the Samples History view, the Add, Adjust, and Submit buttons are enabled or disabled as follows:

- If the transaction's Status field is set to Submitted, the Add and Adjust buttons are enabled and the Submit button is disabled.
- If the transaction's Status field is set to Adjusted, all the buttons are disabled.
- If the transaction's Status field is set to In Progress, the Submit button is enabled and the Add and Adjust buttons are disabled.

Defining Lot Numbers

Siebel Samples Management allows you to define your samples and promotional items according to a number of different implementation scenarios. By specifying certain product settings, you can make Siebel Samples Management suit your company's strategy for inventory tracking and distribution of samples. You can implement samples using lot numbers in the following ways:

- Tracking samples for inventory purposes at a lot level or a sample product level.
- Disbursing some products with lots and others without lots.
- Managing existing samples that have already been distributed and tracked without lot numbers in Siebel Samples Management.
- Using lot numbers for samples creation, transfers, adjustments, orders, and call reporting, but not using lot numbers for inventory and reconciliation. For more information, see ["Managing Inventory Tracking and Reconciliation Without Lot Numbers"](#) on page 154.

Before you can track samples by lot number, you must:

- Verify that the Samples Lots Enabled system preference is set to TRUE (the default setting). For more information, see [“Disabling Lot Number Tracking” on page 151](#).
- Define the products that will be disbursed as samples. For more information, see [“Defining Internal Products” on page 391](#).
- Define the lot numbers for each product. For more information, see the procedure [“To define lot numbers” on page 149](#).

If you track disbursements at the lot number level, you may track inventory with or without using lot numbers. For more information on disabling lot number tracking see [“Disabling Lot Number Tracking” on page 151](#). For more information on reconciliation without lot numbers, see [“Managing Inventory Tracking and Reconciliation Without Lot Numbers” on page 154](#) and [“Enabling Inventory Reconciliation Without Lot Numbers” on page 451](#).

If you are implementing either full or partial lot number tracking for samples use the following procedure to define the lot numbers associated with those samples. This procedure creates lot number records that are children of the parent sample product record. For more information setting up lot tracking, see [“Defining Internal Products” on page 391](#).

Existing products (that is, products that were previously defined without lot number tracking specified) cannot be tracked by lot number if they exist in any user inventory. To begin tracking lot numbers for an existing product, you must create a new product record with a product name indicating that this product will be tracked by lot number. For example, if the existing product is named Aracid 200, you could name the new product Aracid 200 (Lot).

To define lot numbers

- 1 Verify that you have specified the correct settings for the products to be disbursed as samples.

For more information setting up lot tracking, see [“Defining Internal Products” on page 391](#) paying specific attention to [Table 17 on page 391](#) and [Table 18 on page 393](#).

- From the application-level menu, choose View > Site Map > Samples Administration > Lot Setup.
- In the Lot Setup list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Expiration Date	This information can be used for recalls of expired products.
Effective Start Date	The date of manufacture, the date on which the product was received, or another date defined by your company.
Lot #	Enter an unique value that corresponds to the lot number printed on the label of the product.
Inventory By Lot	Check this field if inventory tracking by lot number is required For more information, see “Defining Internal Products” on page 391 paying specific attention to Table 17 on page 391 and Table 18 on page 393 .
Sample	The name of the product for which this lot number will be affiliated. This field should indicate both product name and dosage. Only products that are set up for lot number tracking appear in the dialog box. For more information, see “Defining Internal Products” on page 391 paying specific attention to Table 17 on page 391 and Table 18 on page 393 .

- Repeat [Step 3](#) to define other lot numbers.

NOTE: Multiple lot numbers can be defined for a sample product, as long as each lot number is unique.

You can also include the lot number in the product name when defining the product. For more information, see [“Defining Internal Products” on page 391](#). However, using this method can make the drop-down lists that users select from very long. Only use this method if the number of products that will be disbursed is small.

Disabling Lot Number Tracking

Lot number tracking for sample products is enabled by default. With lot number tracking enabled, the constraints and data checks described in [“How Siebel Samples Management Works with Calls” on page 138](#) and [“Defining Internal Products” on page 391](#) become active.

Setting the Samples Lots Enabled system preference to FALSE causes samples dispersed with lot numbers to not appear in the Samples History or the Inventory Count views. If you plan to disperse samples with lot numbers, the Samples Lots Enabled system preference should be set to TRUE to assure that all relevant data appears in these views.

To disable lot number tracking for samples

- 1** From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2** In the System Preference Name list, locate and select the Samples Lots Enabled record.
- 3** Change the field value to FALSE.
- 4** Exit and relaunch the application.

The change takes effect after the application has been restarted.

Setting the Lots for Disperse Only system preference to TRUE allows you to ship samples to users by lot numbers and allows sales representatives to disburse the samples by lot numbers while maintaining and reconciling inventory without lot numbers. To retain sample product visibility, the samples administrator must reconfigure the Siebel repository. For more information, see [“Managing Inventory Tracking and Reconciliation Without Lot Numbers” on page 154](#).

NOTE: By default, Sample Lots Enabled is set to TRUE and Lots for Disperse Only is set to FALSE. If you do not want to use lot numbers, you can change both of these system preferences, setting Sample Lots Enabled to FALSE and Lots for Disperse Only to FALSE.

Lots for Disperse Only works only when Sample Lots Enabled is set to TRUE. If Sample Lots Enabled is set to FALSE, the system ignores Lots for Disperse Only.

Establishing an Initial Inventory

Establishing an initial master inventory is only necessary if you are manually entering and tracking samples. If you are populating your samples inventory from a third-party system, it is not recommended that you establish an initial master inventory.

As outlined in [“Business Scenarios” on page 140](#), either an administrator or an end user may establish an inventory. However, since Siebel Samples Management routes and maintains transactions by Employee ID, only the user who creates an inventory (the initial inventory count) can create or manipulate that inventory.

Before adding products to the master inventory, you must verify that the products are correctly defined for inventory tracking. For more information, see [“Defining Internal Products” on page 391](#) paying specific attention to [Table 17 on page 391](#) and [Table 18 on page 393](#).

In particular, in the Products form, you must select one of the following fields:

- Orderable
- Either Inventory or the Lot# Tracking

When neither Inventory nor Lot # Tracking are checked, the sample is not tracked in inventory.

For more information, see [“Defining Internal Products” on page 391](#) and [“How a Samples Transaction Works” on page 146](#).

NOTE: End users do not need to perform the procedures described in this section if their initial counts consist only of samples transfers routed to them by their samples administrator. Instead, they should simply acknowledge the receipt of those shipments. For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171](#). However, end users do need to perform the procedures described in this section if their initial counts contain any records that they entered manually. End users who enter records manually must submit those counts and reconcile the initial inventory period.

To establish an initial master inventory:

- **Count products on-hand.** Establish an inventory count by physically counting the products currently on-hand. This process creates a list of the products in your inventory and an inventory period solely for your initial count.
- **Add products and submit count.** Add products to the inventory and submit an initial count. (See [“To add products to inventory and submit an initial count” on page 153.](#))
- **Submit adjustments.** Create and submit adjustments for the initial count. (See [“To create and submit initial count adjustments” on page 155.](#))
- **Reconcile.** Reconcile the initial inventory period. (See [“To reconcile the initial inventory period” on page 157.](#))

To add products to inventory and submit an initial count

- 1 From the application level menu, choose View > Site Map > Samples screen.
- 2 From the Show drop-down list, select Inventory Count.
- 3 In the Inventory Count list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Count	The amount of your initial inventory.
Difference	Shows a negative number after you enter a value in the Count field.
Lot	The lot number for this sample.
Sample	The name of the sample to be added.

Repeat [Step 3](#) to add a record and count for each product in your inventory.

NOTE: Records added to this view can be deleted only if the value of the On Hand Quantity field is zero.

4 Click Submit.

The Difference field is cleared for all records. The application transfers the number you entered in the Count field to the On Hand Quantity field and clears the Count field.

Once you submit an initial count, the Siebel Samples Management deactivates the inventory period into which you entered your initial counts and creates a new active inventory period. You can view this change using the My Samples History filter.

5 From the Show drop-down list, select My Samples History.

The Samples History view appears.

The inventory period into which you entered your initial counts becomes inactive—a date and time appear in the End Date field, and there is no check mark in the Active field. In addition, a new active period has been opened.

Create adjustment transactions for the period, as described in the next procedure.

NOTE: You cannot submit adjustment transaction if the product is not currently active. Siebel Samples Management considers a product inactive if the administrator has made it inactive, or the product does not exist in the inventory count list (it could have been deleted if the on-hand quantity was zero). Inactive products do not display in drop-down lists or dialog boxes, although they may be visible in views displaying products.

Managing Inventory Tracking and Reconciliation Without Lot Numbers

Siebel Samples Management supports using lot numbers for samples creation, shipment, receipt, transfers, adjustment, ordering, and disbursement while not using lot numbers for inventory and reconciliation.

To enable this behavior, you must make three changes:

- Set the value of two system preferences—Samples Lots Enabled and Lots for Disperse Only—to “True.”
- Check the Lot# Tracking flag in the Product Administration screen.
- Implement product visibility. For more information, see [“Retaining Sample Product Visibility” on page 451](#).

When this behavior has been enabled, the Lot No. field is available but not required for samples creation, shipment, receipt, transfers, adjustment, ordering and call reporting. In addition, the Lot No. field is disabled in the Inventory Count and Reconciliation views.

To track and reconcile inventory without lot numbers

- 1 From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2 In the System Preference Name list, query for two records—Samples Lots Enabled and Lots for Disperse Only.
- 3 Set the field value for both records to TRUE.
- 4 Exit and relaunch the application.

The change takes effect after the application has been restarted.

To create and submit initial count adjustments

- 1 From the application level menu, choose View > Site Map > Samples screen.
- 2 From the Show drop-down list, select My Samples Adjustment.
- 3 In the Samples Adjustments list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Adjustment Reason	Select Initial Count from the drop-down list.
Inventory Period	Selecting an Inventory Period automatically enters the correct date in the Transaction Date (Txn Date) field, making sure that the adjustment is entered into the appropriate inventory period.
Transaction #	The application automatically generates a unique identifier. You can change this value.
Transaction Date	It is recommended that you complete the Inventory Period field to auto-fill this field so that the adjustment is entered into the correct period.
Transaction Status	The application automatically changes this field value to Submitted when you submit the adjustment.

- 4** In the Line Items list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Item #	The application automatically generates this value. Edit this value to have the items appear in a particular order.
Item Status	The application automatically changes this field value to Submitted when you submit the transaction.
Lot Name	The lot number for this sample.
Quantity	The amount of your initial inventory. This quantity should be the same as the value you entered in the Count field in the Inventory Count view. For more information, see “To add products to inventory and submit an initial count” on page 153).
Sample	The sample to be adjusted.

Repeat [Step 3](#) and [Step 4](#) to enter a line item for each sample needing adjustment.

- 5** Click Submit.

The values in the Transaction Status field (in the Samples Adjustment form) and the Item Status fields (in the Line Items list) are changed to Submitted.

Reconcile the initial inventory period, as described in the next procedure.

To reconcile the initial inventory period

- 1** From the application level menu, choose View > Site Map > Samples screen.
- 2** From the Show drop-down list, select Reconciliation.

The Reconciliation view contains the following lists.

List	Description
Unreconciled Inventory Periods	Shows all inactive (past, unreconciled) inventory periods. An active period becomes inactive once you submit an inventory count for the period (as described in “To add products to inventory and submit an initial count” on page 153).
Unreconciled Inventory	Shows the products in your inventory, their physical and electronic counts, and the difference between the two counts (if any). The Difference field must be zero for all products before you can reconcile the period.
Samples History	Shows samples transactions entered for the currently selected product in the Unreconciled Inventory list. If no transactions were entered for the selected product during the inactive inventory period, this list is empty.

- 3** In the Unreconciled Inventory list, verify that the Difference field shows zero for the products listed.

If a product shows a value other than zero, you must make an adjustment to correct the difference. For more information, see [“Adjusting a Past Samples Transaction” on page 162](#).

- 4** In the Unreconciled Inventory Periods list, click Reconcile.

The lists in the view are cleared.

- 5** From the Show drop-down list, select My Samples History.

The Samples History view appears. In the Inventory Periods list, a check mark appears in the Reconciled field of the inactive period that you just reconciled.

Creating a Samples Transfer

You create a samples transfer whenever product samples are exchanged within your company. This procedure can be used by:

- A samples administrator to send shipments to end users in the field
- End users to exchange samples between themselves
- End users to return samples to the home office

Once the samples transfer has been submitted into the system, the recipient receives a samples transfer. After the recipient acknowledges the receipt of the transaction, the application enters the new inventory into the his or her inventory count. For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171](#).

NOTE: Samples returns are defined as transfer transactions for which corresponding received shipment transactions have *not* been created. Returned samples are subtracted from the sender’s inventory counts but are *not* added to the master inventory, since they are typically expired or damaged products.

To create a samples transfer

- 1** From the application level menu, choose View > Site Map > Samples screen.
- 2** From the Show drop-down list, select My Sent Samples.
- 3** In the My Sent Samples list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Transfer #	The application automatically generates an unique identifier. You can change this value.
Transfer Date	The application automatically generates a date and time value that falls in the active period.
Transfer Status	The application automatically changes this field value to Submitted when you submit the transaction.

Field	Comments
Transfer to Last Name	The employee to whom you are transferring the samples. If the value of the Transfer Type field is Transfer Out, you must complete this field. Leave this field empty if the value of the Transfer Type field is Return.
Transfer Type	Select the appropriate value: <ul style="list-style-type: none"> ■ Transfer Out - Indicates you are transferring samples to another employee. ■ Return - Indicates you are returning samples to the home office. Samples are typically returned because they are expired or damaged products that should be destroyed. Transfers with the Transfer Type field set to Return do not generate shipment transactions (since there is no recipient), and they are <i>not</i> added to the master inventory counts. However, the samples administrator can see returned samples transactions in the samples administration views. For more information, see “Monitoring Samples Activities” on page 160.

4 In the Line Items list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Item #	The application automatically generates a unique identifier. Edit this value to have the items appear in a particular order.
Item Status	The application automatically changes this field value to Submitted when you submit the transaction.
Lot #	The lot number for this samples transfer.
Quantity	The quantity that you are transferring.
Sample	The samples being transferred.

Repeat [Step 4](#) to enter a line item for each product or promotional item you are transferring.

- 5 Click Submit.

NOTE: A transfer transaction cannot be modified or deleted after it has been submitted.

The value of the Transfer Status field (in the Sent Samples list) and the Item Status field (in the Line Items list) changes to Submitted.

- 6 From the Show drop-down list, select My Samples History.

The Samples History appears.

When you select a product that has been transferred in Inventory List, the line items of the transfer transaction appear in the Samples History list.

Monitoring Samples Activities

As the samples administrator you are responsible for your company's samples inventory and making sure it complies with regulatory rules and regulations. Use the views described in [Table 8](#) to monitor samples activity across the enterprise.

To access monitor samples activities

- 1 From the application-level menu, choose View > Site Map > Samples Administration > Samples Administration.
- 2 From the Show drop-down list, select the view listed in the left column of [Table 8 on page 161](#).

NOTE: The views discussed in [Table 8 on page 161](#) are read-only and appear only when you are connected to the server.

Table 8. Administrator Views for Monitoring Samples Activity

View	Description
Inventory Count	Shows samples inventory counts that have been submitted within the enterprise.
Inventory Adjustments	Shows inventory adjustments for the organization. Adjustment transactions can be submitted by end users or by the samples administrator to resolve discrepancies between physical and electronic inventory counts. Adjustment transactions provide a clear audit trail of samples inventory adjustments.
Received Samples	<p>Shows samples receipt transactions submitted by end user. The Line Items list shows the line items of the samples receipt currently selected in the Samples Receipts list.</p> <p>This view allows the administrator to review sent shipments between end users.</p>
Sample Discrepancies	<p>Shows samples receipts submitted by users in which the received quantity did not match the shipped quantity. The Line Items list shows the line items for the receipt currently selected in the Sample Discrepancies list.</p> <p>This view allows the administrator to make sure that samples are not being diverted.</p>
Samples History	<p>Shows a list of samples transactions. Be aware that:</p> <ul style="list-style-type: none"> ■ If a Contact record is removed, the application removes the that name from all lists that reference that contact's name in the S_CONTACT table. This can cause the name fields in Samples History records to appear empty. Use caution when deleting Contacts records. ■ Drilling down on the Transaction # takes users to the Samples Adjustment list. In order to assure that users can take advantage of these hyperlinks, they must have the destination view for product hyperlinks in their responsibilities.

Table 8. Administrator Views for Monitoring Samples Activity

View	Description
Samples Orders	<p>Shows samples order transactions submitted by end users or their managers. The Line Items list shows the line items of the samples order currently selected in the Samples Orders list.</p> <p>This view allows the administrator to review samples order sent from end users.</p>
Sent Samples	<p>Shows samples transfer transactions submitted. The Line Items list shows the line items of the samples transfer currently selected in the Sent Samples list.</p> <p>This view allows the administrator to review shipments sent between end users.</p>

Adjusting a Past Samples Transaction

The samples administrator and end users can adjust inventory counts of samples stock by making adjustments to past samples transactions. Common reasons for adjusting past transactions include product loss or expiration, counting mistakes, or data entry errors. You can add products or adjust quantities for any type of samples transaction (disbursement, transfer, order, and so on).

NOTE: You cannot add a product to your inventory that did not exist when the original transaction was created.

You adjust a past samples transaction in the Samples History view.

When you select a product in the Inventory List, the Samples History list shows samples transactions entered for that product. For example, if a sales representative dropped multiple samples on a call, the Samples History list would display one line-item record for each sample. Also, if an adjustment has been made to an item in the transaction, an additional row (corresponding to the adjustment) will appear in this view.

To add a product to a samples transaction

- 1 From the application level menu, choose View > Site Map > Samples screen.
- 2 From the Show drop-down list, select My Samples History.
- 3 In the Inventory List, select a product.

When you select a product in the Inventory List, the Samples History list shows all samples transactions entered for that product. You can identify the transaction record in the Samples History list by the Transaction Date, Last Name, or Transaction # field values.

NOTE: To make it easier to find a transaction, sort the records in the Samples History list by the field you are using to identify the transaction. For example, if you know the Transaction #, sort the list by that field to locate the records you are looking for.

- 4 In the Samples History form, click Add.

When you add a new record, the application adds a new line-item record for the transaction in the Samples History list and sets the line-item record's Item field Status to Pending Approval. With the exception of the Item Status value, the new record is a copy of the record selected in [Step 3](#).

- 5 In the Samples History form, modify the new record to reflect the correct product information.

Some of the fields in a Samples History record are described in [Table 9](#).

Table 9. Some of the Fields in a Samples History Record

Field	Comments
Created By Last Name	The last name of the creator of the transaction.
Description	A description of the product or comment describing the transaction.
Last Name	The last name of the doctor. Used only if the transaction type is disbursement.

Table 9. Some of the Fields in a Samples History Record

Field	Comments
Item Status	<p>The application automatically changes this field value to Submitted when you submit the adjustment.</p> <p>For any row that shows an item status of Submitted, you can also see one or more rows with the identical sample name and transaction number but with an item status of In Progress or Adjusted.</p> <p>Valid values include:</p> <ul style="list-style-type: none"> ■ In Progress - Indicates that the adjustment record has not yet been submitted, so it can still be modified. However, the record's data is not reflected in the inventory count. ■ Submitted - Indicates that the record has been submitted and therefore cannot be modified. Since it has been submitted, the record's data is reflected in the inventory count. ■ Adjusted - Indicates that a previously submitted record has been superseded by a subsequent adjustment record. The record cannot be modified.
Lot #	The correct lot number for this sample.
Quantity	The quantity of samples shipped or disbursed in the transaction.
Sample	Verify that the correct product name is selected.
Transaction #	The transaction number or, in the case of samples disbursements, the reference number. The Transaction # value corresponds to the Ref # value displayed in the Contact Call Detail view.
Transaction Date	The date the transaction was created.
Transaction Status	An indicator of the status of the original sample transaction.
Transaction Type	Shows the type of transfer. Valid values include Transfer Out and Transfer In.
Transfer To/From Last Name	The name of the employee receiving or generating the transaction. Used only if the transaction type is Transfer Out or Transfer In.

To adjust a quantity in a samples transaction

- 1** From the application level menu, choose View > Site Map > Samples screen.
- 2** From the Show drop-down list, select My Samples History.
- 3** In the Inventory Periods list, select the period containing the transaction for which you want to adjust a quantity.

The products for the selected period are displayed in the Inventory List.

- 4** In the Inventory List, select the product whose quantity you want to adjust.

When you select a product in the Inventory List, the Samples History list lists all samples transactions entered for that product. You can identify the transaction record in the Samples History list by the Transaction Date, Last Name, or Transaction # field values.

- 5** In the Samples History form, click Adjust Qty and then OK.

The application first verifies that you have sufficient rights to make the adjustment and then adds a new line-item record for the transaction in the Samples History list and sets the line-item record's Item Status field to In Progress. With the exception of the Item Status value, this record is a copy of the record you selected in [Step 4](#).

- 6** In the Samples History form, enter the correct quantity in the Quantity field.
- 7** Click Submit, and then OK.

The application adds new item with an Item Status of Submitted and changes the original item record (whose quantity you adjusted) to an Item Status of Adjusted. The new quantity is reflected in the on-hand quantities in the Inventory Count view.

Checking Electronic Signatures

End users can use Siebel ePharma Handheld to electronically capture signatures. The Signature Audit Administration view lists the four most recent electronically captured signatures of a contact to whom samples were dropped. For more information on using Siebel ePharma Handheld, see *Siebel ePharma Handheld Guide for Windows-Powered Devices*.

As the samples administrator, be sure to check Signature Audit Administration regularly and perform signature capture verification to make sure that signatures collected from each contact are consistent.

The signature capture verification determines if the call information has been modified by comparing the information captured from the signature (the signature event string) with the current call information (the current call string). Reasons for call information modification include:

- Recreation of a sample receipt
- Sample adjustments
- Fraud

Signature capture verification is launched from the Verify button on the Signature Audit Administration view. For an example of signature audit administration, see *Siebel ePharma Handheld Guide for Windows-Powered Devices*.

As the samples administrator you are responsible for your company's samples inventory and making sure it complies with regulatory rules and regulations. Use the views described in [Table 8 on page 161](#) to monitor samples activity across the enterprise.

To display Signature Audit Administration

- 1** From the application-level menu, choose View > Site Map > Samples Administration > Samples Administration.
- 2** From the Show drop-down list, select Signature Audit Administration.

The Signature Audit Administration view appears.

NOTE: If a Contacts record is deleted, the application removes the contact name from lists that reference that contact's name in the S_CONTACT table. Therefore, if the Contact Id is deleted from the S_ACT_SIGN table, the last name and first name fields appear empty in the Signatures form within the Signature Audit Administration view. However, deleting a Contacts record does not affect the Contact Full name since it is stored in a text field in the same table. In the Pharma Signature Receipt Form, the control above the Signature shows the full name of the contact at the time of the call (that is, no reference to the S_CONTACT table). Since the contact's name is not removed from this list, a permanent and complete electronic record of calls captured with signatures recorded electronically is maintained.

Generating a Receipt for Calls with Electronic Signatures

The Sample Event Administration screen shows an entire sample transaction as it was recorded at the time the signature was captured. Sales representatives can submit electronically captured signatures using Siebel ePharma Handheld. For more information on using Siebel ePharma Handheld, see *Siebel ePharma Handheld Guide for Windows-Powered Devices*.

To display Sample Event Administration

- 1 From the application-level menu, choose View > Site Map > Samples Administration > Samples Administration.
- 2 From the Show drop-down list, select Samples Event Administration.

The Samples Event Administration view appears.

Creating New Disclaimer Text for Signature Capture Display

The Disclaimer Administration screen shows the disclaimer information that appears in the Siebel Signature Capture display for Siebel ePharma Handheld. For more information on using Siebel ePharma Handheld, see *Siebel ePharma Handheld Guide for Windows-Powered Devices*.

To display the Disclaimer Administration screen

- 1 From the application-level menu, choose View > Site Map > Samples Administration > Samples Administration.
- 2 From the drop-down list, select Disclaimer Administration.

- 3** To replace existing disclaimer text, create a new record in the Disclaimers list and complete the necessary fields.

The new disclaimer becomes active immediately. Only one disclaimer can be active at a time.

End-User Procedures

The following end-user procedures are described in this section:

- [To create a samples order on page 170](#)
- [To acknowledge receipt of a samples transfer on page 172](#)
- [To record a sample theft or loss on page 173](#)
- [To create and submit an inventory count on page 175](#)
- [To identify discrepancies in inventory counts on page 176](#)
- [To adjust multiple quantities with a new adjustment transaction on page 177](#)
- [To reconcile an inventory period on page 179](#)

NOTE: End-users must configure personal lists of the products they detail, the products they distribute as samples, and the products they provide as promotional items before they can record information about contact calls or account calls. For more information on creating personal lists, see [“Creating a Personal List” on page 82](#).

About Establishing an Initial Inventory Count

End users only need to establish an initial inventory count when their initial counts contain records that they manually entered into Siebel Samples Management. If that is the case, they must set up an initial master inventory, make adjustments, and then reconcile it as described in [“Establishing an Initial Inventory” on page 152](#).

If their initial counts only contain samples routed to them by their samples administrator, they simply need to acknowledge the receipt of those shipments. For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171](#).

Creating a Samples Order

End users can request additional samples by creating a samples order. Once submitted, the application routes the samples order to the samples administrator. The samples administrator then creates a samples transfer that is routed back to the requestor. Once the requestor acknowledges receipt of the transfer, Siebel Samples Management automatically enters the new inventory into their inventory counts.

NOTE: Creating samples orders is optional. Siebel Samples Management allows users to acknowledge receipt of samples shipments even if they have not created orders for those samples. The Siebel administrator determines whether or not users are required to create samples orders for record-keeping purposes.

To create a samples order

- 1** Navigate to the Samples screen.
- 2** From the Show drop-down list, select My Samples Orders.
- 3** In the Samples Orders list, add a new record.

The application adds a new record and automatically sets the Order Date field to a date and time in the active period.

NOTE: It is not necessary to change the Order Type field. You can include both samples and promotional items in a single order.

- 4 In the Line Items list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Line #	The line number of this item in the transaction. The application automatically generates, values for this field, but it can also be edited. You might want to edit this value to have the items appear in a particular order (other than the order in which you entered them).
Item Status	Initially set to In Process. The application automatically changes this field value to Submitted when you submit the transaction.
Sample	The product to be ordered.

Repeat [Step 4](#) to enter a line item for each product or promotional item you want to order.

- 5 Click Submit.

NOTE: An order cannot be modified or deleted after it has been submitted.

The values of the Order Status field (in the Samples Order list) and the Item Status field (in the Line Items list) change to Submitted.

Acknowledging Receipt of a Samples Transfer

Siebel Samples Management supports two ways of electronically moving samples inventory:

- By creating a samples transfer (see [“Creating a Samples Transfer” on page 158](#))
- By creating a samples order (see [“Creating a Samples Order” on page 170](#))

In either case, the application creates a samples transfer transaction and routes it to the recipient for acknowledgement. Once the recipient submits a receipt, the application transfers the new inventory into their active inventory period. End users can then view the new inventory in the Samples History screen. For more information on displaying the Samples History view, see [“Adjusting a Past Samples Transaction” on page 162](#).

To acknowledge receipt of a samples transfer

- 1** Navigate to the Samples screen.
- 2** From the Show drop-down list, select My Received Samples.
- 3** In the Received Samples list, select the transfer that you want to acknowledge.

Samples transfers that have not been acknowledged as received show an Invoice Status value of In Progress. Those that have been acknowledged as received show an Invoice Status value of Submitted.
- 4** In Line Items list, modify the Received Quantity field if the value does not accurately reflect the quantity received.
- 5** Click Submit.

NOTE: The samples transfer quantities do not appear in end users inventory counts until they submit a samples receipt. However, once the samples receipt has been submitted, it cannot be modified or deleted.

The values in the Invoice Status field (Received Samples list) and the Item Status field (Line Items list) change to Submitted.

End users can track discrepancies between shipped quantities and received quantities by using the My Received Samples Transfer Discrepancies filter. A manager's version of this view is also provided, and the samples administrator can track samples discrepancies system-wide by using a samples administration view. For more information on available administration views, see [“Monitoring Samples Activities” on page 160](#).

- 6** From the Show drop-down list, select My Samples History.

The Samples History view appears. Selecting a period in the Inventory Periods list shows the line items of the received transfer in the Samples History list.

Adjusting an Inventory Count

The administrator and end users can adjust inventory counts of samples stock by making adjustments to past samples transactions. Common reasons for adjusting past transactions include product loss or expiration, counting mistakes, or data entry errors. When adjusting an inventory account, users may add products or adjust quantities for any type of samples transaction (disbursement, transfer, order, and so on). For more information on adjusting inventory counts, see [“Adjusting a Past Samples Transaction” on page 162](#).

Recording Thefts and Losses

End users record sample thefts or losses in the Samples Adjustments view.

To record a sample theft or loss

- 1 Navigate to the Samples screen.
- 2 From the Show drop-down list, select My Samples Adjustments.
- 3 In the Samples Adjustments list, add a new record.
- 4 In the Adjustment Reason field, select Lost.
- 5 In the Line Items list, add a new record and complete the necessary fields.
- 6 Click Submit.

Reconciling an Inventory Period

At least once a year, end users are required to perform an inventory reconciliation to remain in PDMA compliance. Users might also need to perform an inventory reconciliation if they are receiving a promotion or leaving the company. For more information on reconciliation, see [“Inventory Reconciliation” on page 136](#).

Prior to starting inventory reconciliation, users must perform the steps outlined in [Figure 3](#).

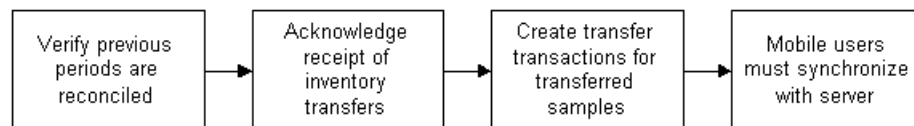


Figure 3. Inventory Reconciliation Prerequisites

These inventory reconciliation prerequisites must be performed in the following order:

- **Verify previous inventory periods are reconciled.** End users must reconcile previous inventory periods in chronological order. This is only a concern if a company's configuration allows more than one inactive, unreconciled period. For more information, see [“About Establishing an Initial Inventory Count” on page 169](#).
- **Acknowledge receipt of inventory transfers.** End users must send acknowledgements for all received sample inventory shipments. For more information, see [“Acknowledging Receipt of a Samples Transfer” on page 171](#).
- **Create transfer transactions for transferred samples.** End users must create transfer transactions for any samples transferred to another representative or returned to the home office. For more information, see [“Creating a Samples Transfer” on page 158](#).
- **Mobile users synchronize with server database.** Mobile end users must synchronize their local database with the server database before submitting an inventory count. This is especially important if they are recording samples received in a prior period or to be received in a future period. For more information on synchronizing a local database, check with your Siebel administrator.

NOTE: Counts for transferred and received samples are not reflected in the inventory count until their records have been submitted.

An inventory period cannot be reconciled if any discrepancy exists between the physical and electronic counts. If a discrepancy exists, it must be corrected before a user can reconcile the period. For more information, see the procedure [“To identify discrepancies in inventory counts” on page 176](#).

The reconciliation process consists of the steps outlined in [Figure 4](#).

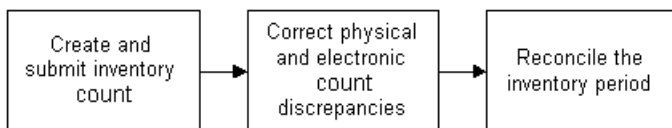


Figure 4. Inventory Reconciliation Process

These reconciliation steps must be performed in the following order:

- **Create and submit an inventory count.** End users must create and submit an inventory count (either by product or lot number) of the products currently on-hand. For more information, see the procedure [“To create and submit an inventory count” on page 175](#).

End users cannot submit a count differently from the way they submitted the previous period’s count *unless the previous period has been reconciled*. For example, if they submitted the previous period’s count by product name, they must reconcile that period before they can submit a subsequent count by lot number.

- **Correct physical and electronic count discrepancies.** End users must correct any discrepancies between the physical counts and the electronic counts by:
 - Creating and submitting a sample adjustment transaction with one or more line items. For more information, see the procedure [“To adjust multiple quantities with a new adjustment transaction” on page 177](#).

This method allows end users to adjust the inventory counts of multiple products with a single adjustment transaction (containing multiple line items). However, they may want to use this method if they need to adjust more than two or three counts.

- Adjusting previous transactions. Adjusting line-item records of previously entered transactions. For more information, see the procedure [“To adjust a quantity in a samples transaction” on page 165](#).

This method allows end users to adjust the quantity of a selected line item in a previously entered transaction. However, they may want to use this method if they only need to adjust one or two counts.

- **Reconcile the inventory period.** For more information, see the procedure [“To reconcile an inventory period” on page 179](#).

To create and submit an inventory count

- 1 Physically count all samples currently on-hand.
- 2 Navigate to the Samples screen.

- 3 From the Show drop-down list, select Inventory Count.

The Inventory Count list lists records for every product in your inventory.

NOTE: Records in the Inventory Count view can be deleted only if the value of the On Hand Quantity field is zero. Do not delete records from this view unless you are certain that you will not need to enter adjustments to any transactions containing the product in the future or in a past unreconciled period.

- 4 In the Inventory Count list, enter a value in the Count field for all records.

The Difference field in some records may show a value other than zero.

Proceed in one of the following ways:

- If the Difference field in any record shows a value other than zero, click Submit and follow the procedure [“To identify discrepancies in inventory counts” on page 176](#).
- If the Difference field in all records is equal to zero, click Submit and follow the procedure [“To reconcile an inventory period” on page 179](#).

To identify discrepancies in inventory counts

- 1 Navigate to the Samples screen.
- 2 From the Show drop-down list, select Reconciliation.
- 3 In the Unreconciled Inventory Periods list, select the period that you want to reconcile.
- 4 In the Unreconciled Inventory List, scroll to determine how many product records show a value other than zero in the Difference field.

The number of discrepancies determines the adjustment method.

- 5 For every record in the Unreconciled Inventory List whose Difference field does not equal zero, write down the sample name, the lot number, and the value displayed in the Difference field.

A positive value in the Difference field means that your electronic count (the Stock Quantity field) is greater than your physical count (the Counted Quantity field). A negative value in the Difference field means that your electronic count (the Stock Quantity field) is less than your physical count (the Counted Quantity field).

Proceed in one of the following ways:

- If only one or two records require adjustments, enter individual line-item adjustments for those transactions. In this case, write down the transaction numbers of the transactions you plan to adjust.

The Samples History list displays all transactions corresponding to the product selected in the Unreconciled Inventory List. You can find the transaction number in the Transaction # field of the Samples History list. Then proceed with the procedure [“To adjust a quantity in a samples transaction” on page 165](#).

- If more than two records require adjustments, enter a single adjustment transaction, with multiple line items, that adjusts all the quantities. Proceed to the following procedure, [“To adjust multiple quantities with a new adjustment transaction” on page 177](#).

To adjust multiple quantities with a new adjustment transaction

- 1 Navigate to the Samples screen.
- 2 From the Show drop-down list, select My Samples Adjustments.
- 3 In the Samples Adjustments list, add a new record and complete the necessary fields.

Some of the fields in a Samples Adjustment record are described in the following table.

Field	Comments
Adjustment Reason	Follow your company’s guidelines for what to select for this field.
Transaction #	The application automatically generates a unique identifier. You can change this value.
Transaction Date	The application automatically generates a unique identifier for this field.
Transaction Status	The value will be changed to Submitted when you submit the transaction.

- 4 In the Line Items list, add a new record and complete the necessary fields.

Some of the fields in a Line Items record are described in the following table.

Field	Comments
Expiration Date	Read-only. This field is automatically filled when you complete the Lot # field.
Item Status	The application changes value in this field changes to Submitted when you submit the transaction.
Item #	The number of this item in the transaction. Line numbers are automatically generated but can be edited. You might want to edit this value to have the items appear in a particular order (other than the order in which you entered them).
Lot Name	The lot number for this sample.
Quantity	The amount of the sample adjustment. The quantity you enter can be positive or negative, depending on the value you recorded in Step 5 on page 176 : <ul style="list-style-type: none">■ If the value that you recorded was positive, enter a negative quantity.■ If the value that you recorded was negative, enter a positive quantity.
Sample	The product for which you want to enter a quantity adjustment.

Repeat [Step 4](#) until you have entered a line item for each needed adjustment.

- 5 In the Samples Adjustments list, click Submit.

The values of the Transaction Status field (in the Samples Adjustments list) and the Item Status field (in the Line Items list) change to Submitted.

- 6 Reconcile the inventory period, as described in the following procedure.

To reconcile an inventory period

- 1** Navigate to the Samples screen.
- 2** From the Show drop-down list, select Reconciliation.
- 3** In the Unreconciled Inventory Periods list, select the inventory period that you want to reconcile.
- 4** Scroll through the records.
- 5** In the Unreconciled Inventory List, scroll through the records and verify that the value of the Difference field for each record is zero.
- 6** Click Reconcile.

The Samples Reconciliation view is cleared.

Managing Samples

End-User Procedures

Administering and Managing Accounts

7

An *account* is any healthcare business that generates sales for your company or potentially could generate business. Typical examples of accounts include hospitals, clinics, HMOs, wholesalers, group purchasing organizations (GPOs), and pharmacies. An account can also be any organization with which multiple contacts are associated, such as a group practice or an assisted-living facility.

This chapter describes how to administer and manage Siebel Life Sciences account information. Using the procedures given in this chapter, you will be able to perform the administrator tasks of generating account hierarchies, deleting an account, specifying which accounts are competitors, and associating bricks with account addresses. End users use the Accounts views to track a variety of account information, including account affiliations, account and contact relationships, activities and opportunities associated with accounts, and formulary information.

For more information on specific administrator and end-user tasks, see [“Business Scenario” on page 184](#).

About Account Hierarchies

An account hierarchy is a group of accounts that are organized by parent-child relationships. All of the Siebel Life Sciences applications support displaying these account relationships and the contacts, activities, and opportunities associated with each account on a hierarchical tree.

The hierarchical tree is a visual representation of account hierarchy data that allows end users to view the relationships between accounts. By viewing an account rollup, users can see aggregated account information, including contacts, coverage teams, activities and opportunities.

When end users have access to an account, they can review the hierarchical structure for that account, its child accounts and the contacts that work there. Account hierarchies are stored in five subviews of the Account screen—Relationship Hierarchy view, Activity Roll-up, Contact Roll-up, Opportunity Roll-up, and Coverage Team Roll-up.

Depending on your configuration, an account that does not have a parent-child relationship with another account may not appear in the rollup views.

About Bricks

A brick is a collection of accounts and contacts, normally in a common geographic area. The primary purpose of a brick is to allow a company to publish RSA (retail sales analysis) data while making sure that specific sales cannot be tracked to a particular contact or account. For more information on creating bricks, see [“Defining a Brick” on page 53](#).

IMS Health publishes retail sales data and determines the definition of bricks. Brick definitions are reviewed every six months and adjusted to make sure that the brick is as small as possible while providing the required level of anonymity.

Because brick data is a key measure of return on a pharmaceutical company's investment in sales promotion, outside the United States most pharmaceutical sales territories are built based on brick data available for that country. This provides a meaningful way to measure performance over time.

How Bricks Work in Siebel ePharma

In Siebel Life Sciences, you can associate a contact or an account address with a brick. A contact can be associated with multiple bricks and an account with multiple addresses can have one brick for each address.

This implementation of Siebel ePharma also supports “mini-bricks.” Mini-brick data is a subset of brick data that narrows the number of contacts and accounts in a geographic area. Mini-bricks provide a more detailed view of an area, without identifying the individuals in the unit.

It is the Siebel administrator's responsibility to set up and maintain brick definitions as well as associate bricks with account addresses and contacts. For more information on associating a brick with an account address, see [“Associating a Brick with an Account Address” on page 191](#). For more information on associating a brick with a specific contact, see [“Associating a Contact with a Brick” on page 55](#).

Business Scenario

This section outlines an example workflow performed by a Siebel administrator and end users. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company is updating account information in their database. During this update process, the administrator is responsible for setting up and updating Siebel Accounts so that sales representatives can plan, track, and access account information. The administrator first deletes any obsolete accounts, then adds new information on competitors, and generates an account hierarchy. Finally, the administrator associates new accounts with existing bricks (geographic areas), if applicable.

Sales representatives use Siebel Accounts to manually add and modify account information. For accounts with multiple departments and divisions, representatives can enter additional information for subaccounts. They can also add more depth to account data by creating user-defined fields called categories. Using categories, representatives can track private or shared information about accounts (for example, which accounts have memberships to specific professional associations).

Account-based sales personnel, such as managed care account managers, use Siebel Accounts to manage information on managed care plans offered by an account and track the formulary information on each plan. They can also track the associations between plans and contacts.

For greater efficiency in call reporting, representatives can associate a contact with a specific account. Once these relationships are tracked within the system, they can record attendee calls. Attendee calls (very similar to contact calls) allow users to record the account call and samples disbursements for contacts seen at the account. Prior to visiting an account, representatives can view a snapshot of important information related to an account using the Pre-Call view. For more information on recording account calls, see [“Recording Account Calls” on page 129](#).

Finally, both representatives and managers can evaluate the business potential of accounts by using the Account Rankings and Ratings view and the various charts provided in the Charts views.

Example Workflow for Managing Accounts

This section details sample tasks often performed by administrators, sales representatives and account-based sales personnel to record account calls. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to manage accounts:

- **Enter information on competitors.** For more information, see [“Specifying a Competitor” on page 187.](#)
- **Delete existing accounts.** For more information, see [“Deleting an Account” on page 188.](#)
- **Generate a default account hierarchy and dynamic account hierarchies.** The account hierarchy lists accounts, child accounts and the activities, contacts and opportunities associated with all the accounts. For more information, see [“Generating Account Hierarchies” on page 188.](#)
- **Associate a brick with an account address.** For more information, see [“Associating a Brick with an Account Address” on page 191.](#)

End-User Procedures

The following list shows tasks end users typically perform when managing account information in the field:

- **View aggregated data across account hierarchies.** End users can see data rolled up as a hierarchical structure of accounts. For more information, see [“Viewing Account Hierarchies in Roll-up Views” on page 196.](#)
- **Create new accounts.** For more information, see [“Adding an Account” on page 194.](#)
- **Specify account profiles.** For more information, see [“Specifying an Account Profile” on page 195.](#)
- **View account hierarchies in roll-up views.** For more information, see [“Viewing Account Hierarchies in Roll-up Views” on page 196.](#)

- **Add account categories.** For more information, see [“Adding Category Information” on page 199](#).
- **Indicate affiliations contacts with accounts.** For more information, see [“Indicating an Affiliation Between an Account and a Contact” on page 200](#).
- **Indicate affiliations between accounts.** For more information, see [“Indicating Affiliations Between Accounts” on page 201](#).
- **Create subaccounts.** For more information, see [“Adding Subaccounts” on page 203](#).
- **View pre-call information.** Before making a call, representatives can review details about an account. For more information, see [“Viewing Pre-call Information” on page 205](#).
- **Enter information on managed care plans and formularies offered by accounts.** Managed-care account managers can record details of plan designs and formularies at an account, including the products on those formularies, formulary review frequency and next review date. For more information, see [“Adding Plan and Formulary Information” on page 206](#).
- **Update contact information.** Representatives can add information about contacts associations with plans and their roles on P & T committees. For more information, see [“Associating Contact Information to Plans” on page 208](#).
- **Track account documentation.** Representatives can review documentation associated with an account, the contacts responsible for each document and when reviews are due. For more information, see [“Tracking Documentation Associated with an Account” on page 209](#).

Administrator Procedures

The following administrator procedures are described in this section:

- [To specify an account as a competitor](#)
- [To delete an account on page 188](#)
- [To generate a default account hierarchy on page 189](#)
- [To create a dynamic account hierarchy of selected accounts on page 190](#)
- [To associate a brick with an existing account address on page 191](#)

Specifying a Competitor

You enter competitors into Siebel Life Sciences as accounts, but with the Competitor field selected.

To specify an account as a competitor

- 1** From the application-level menu, choose View > Site Map > Data Administration > Accounts.
- 2** In the Accounts form, add a record and then click the show more button.
- 3** Complete the necessary fields.
- 4** Select the Competitor field.

For more information on creating accounts from the Accounts screen, see [“Adding an Account” on page 194](#). For more information on adding competitive product information, see [“Managing Competitor Information” on page 402](#).

Deleting an Account

Deleting an account completely removes the account from the system. Be aware that deleting an account could have undesired consequences.

As an alternative to deleting an account, consider making the Siebel administrator the primary team member so that he or she can remove all other employees from the account's team.

If you are certain that the account is no longer active, use the following procedure to delete it.

To delete an account

- 1 From the application-level menu, choose View > Site Map > Data Administration > Accounts.
- 2 In the Accounts list, select and then delete the appropriate account.

Generating Account Hierarchies

Data aggregation is available via the Roll-up views provided the administrator defines one or more hierarchies. The application administrator typically defines a “default” hierarchy by associating accounts with one another using the parent field on a company form, or the subaccount view for child accounts. Administrators can define account hierarchies display aggregated data—the activities, opportunities, contacts, and coverage teams—across account organizational structures. For example, the top node of the hierarchy contains activities for the organization, the subsidiaries below the organization, the departments at the subsidiaries, and contacts working at any level of the tree. As the end users move up and down the tree, they see more or less data rolled up to the selected level.

The application administrator can define two types of hierarchies for data aggregation—a default hierarchy for all end users and specific hierarchies that are used only by certain end users.

Default Account Hierarchies

The application administrator sets up a default account hierarchy once, during the initial application setup. The default hierarchy is available to all end users who are not tied to a specific hierarchy and who have been granted view access to the accounts represented in the hierarchy. It is the administrator's responsibility to give end user access to Account views. For more information, see *Applications Administration Guide*.

When new accounts are added, they are automatically added to the default hierarchy tree and the contacts, coverage teams, activities, and opportunities that are associated with the accounts are automatically displayed in the rollup views.

In the preconfigured application, using the Generate Hierarchy button adds only parent account and child accounts to the hierarchy. Any account that does not have a child or parent is not displayed in the rollup views. In Siebel Tools, you can change the DynHierarchy LoadAllAccounts user property to alter this behavior.

The DynHierarchy LoadAllAccounts user property on the Dynamic Hierarchy Direct Relationship business component can be set to N or Y. When it is set to N, only parent and children appear in the generated hierarchy. When DynHierarchy LoadAllAccounts user property is set to Y, all accounts are added to the account hierarchy. For information on setting user properties, see *Siebel Tools Reference*.

To generate a default account hierarchy

- 1** In the application-level menu, choose View > Site Map > Application Administration > Account Hierarchies.

- 2 In the Account Hierarchies list, click Generate Hierarchy.

The parent-child account relationships that have been defined in your application are registered for participation in the roll-up views. This process may take some time, depending on the quantity of account records that are in your existing environment.

When the account hierarchy has been generated, a new record appears in the Account Hierarchies list. The Hierarchy Name field of the record contains the user Id of the administrator who generated the account hierarchy and the time it was generated. If it is the only account hierarchy record, the Default field is automatically checked. The accounts that have been added for participation in the roll-up views appear in the Account Relationships list.

NOTE: If no accounts are visible in the Account Relationships list, click the query button, step off the query, and click Go to refresh the view.

- 3 Optional. Rename the account hierarchy and, if necessary, check the Default field.

NOTE: If end users are using the application when you generate the account hierarchy, they must log off and log on again to see the default account hierarchy in the rollup views.

Dynamic Account Hierarchies

In some cases, users work with particular accounts or subaccounts of a large corporation, but not with others. In these instances, some end users do not need to or should not see aggregated data across the entire corporation. An administrator can define a custom hierarchical structure across which data can be aggregated. This defined structure, called a *dynamic hierarchy*, can be as simple or complex as needed and offers users the ability to aggregate data across the accounts they are interested in seeing.

To create a dynamic account hierarchy of selected accounts

- 1 In the application-level menu, choose View > Site Map > Application Administration > Account Hierarchies.
- 2 Create a new account hierarchy record.

- 3 Click the add button in the Account Relationships list, select accounts in the Add Account dialog box, and click OK.

All the accounts in the Account Relationship list belong to the new account hierarchy.

- 4 To define parent and child relationships, select an account in the Account Relationship list that has no parent account, click the select button in the Parent Account field, and select a parent account in the Pick Parent Account dialog box.
- 5 Repeat [Step 4](#) for all accounts that have no parents.
- 6 Associate the dynamic hierarchy with an organization.

End users can only see the account hierarchy with which their current position's primary organization is tied. It is the administrator's responsibility to associate end users with positions, positions with organizations, and organizations with hierarchies. For more information, see *Applications Administration Guide*.

Associating a Brick with an Account Address

In Siebel Life Sciences, you can associate a brick with an account address. Because bricks are associated with an account's address (and not the account itself), you can associate accounts that have multiple addresses with multiple bricks.

NOTE: For more information on bricks, see [“About Account Hierarchies” on page 182](#). For more information on associating a brick with a specific contact, see [“Associating a Contact with a Brick” on page 55](#).

To associate a brick with an existing account address

- 1 Verify that brick records have been set up.
For information, see [“Defining a Brick” on page 53](#).
- 2 From the application-level menu, choose View > Site Map > Data Administration > Accounts.
- 3 In the Accounts list, select an account.
- 4 In the Account form, click the show more button.

5 In the Brick field, click the select button.

6 In the Pick Brick dialog box, select a brick.

If there is more than one account address for the account, a brick may be assigned for each address.

End-User Procedures

The following end-user procedures are described in this section:

- [To add an account on page 194](#)
- [To add account profile information for an account on page 195](#)
- [To view aggregated activities for an account on page 197](#)
- [To view the aggregated coverage team for an account hierarchy on page 197](#)
- [To view the aggregated opportunities for an account hierarchy on page 198](#)
- [To view an aggregated list of contacts an account on page 198](#)
- [To add category information for an account on page 199](#)
- [To indicate an affiliation between an account and a contact on page 200](#)
- [To add a new role for an affiliated contact on page 201](#)
- [To indicate an affiliation between accounts on page 201](#)
- [To view an account's upward and downward account affiliations on page 202](#)
- [To add a subaccount on page 204](#)
- [To indicate an affiliation between a contact and a subaccount on page 205](#)
- [To view pre-call information on page 206](#)
- [To add plan information to an account on page 207](#)
- [To add formulary information to an account on page 207](#)
- [To associate contacts with account plans on page 208](#)
- [To update a contact's role on page 209](#)
- [To track documentation associated with an account on page 209](#)

Adding an Account

Accounts are businesses and organizations that either currently generate sales for your company or have the potential to do so. Because formulary opportunities are created and managed based on accounts and contacts can be affiliated with one or more accounts, entering and maintaining accurate account information is a critical task.

Accounts are also used to track competitor information. An account record with the Competitor field selected represents a competing company. Only the administrator can edit the Competitor field to create a competitor record. For more information, see [“Specifying a Competitor” on page 187](#).

Multiple employees can be assigned, as a team, to an account. Any employee assigned to the team can update the account’s information. A user who adds an account is automatically designated as the *primary* account team member. However, he or she can also be added to an account team created by another user (such as a manager).

Editing an Account Address

Accounts in Siebel Life Sciences can have multiple addresses. Users can edit existing addresses directly in the Address field. However, users should be careful when editing an existing address. Editing an existing address, changes it for all accounts currently associated with the address.

To add an account

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.

- 3** In the More Info form, add a record and complete the necessary fields.

Some of the fields in an Account record are described in the following table.

Field	Comments
Account Team	Multiple people can be assigned to the account team. The team member who created the record is indicated as primary.
Address Line 1	The account can have more than one address. One address must be specified as primary (Address Line 1).
Brick	The brick (geographic area) code associated with the account's primary address. Brick assignment is made using the Account Administration view on the Marketing Administration Screen. For more information, see “Generating Account Hierarchies” on page 188 .
Competitor	Selecting this field indicates that the company is a competitor. Only the administrator can edit this field. For more information, see “Specifying a Competitor” on page 187 .
Name	Name of the account.
Parent	If this account is a subaccount of another account, select the parent account.
Site	A unique location identifier that distinguishes this account from any other accounts with the same name. For example, enter a city or county name in this field to uniquely identify a hospital.

NOTE: Only a Siebel administrator can delete an account. For more information, see [“Deleting an Account” on page 188](#).

Specifying an Account Profile

Using the Account Profile view end users can track profile information about an account, including the call frequency, details about the account size, the best times to call on the account, and historical list of all activities at the account. The Account type field in the Account form (at the top of the screen) determines what fields appear in the Account Profile form.

To add account profile information for an account

- 1** Navigate to the Accounts screen.

- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting an account, do not click a hyperlink (underlined field). Doing so takes you to another view.

- 4 Click the Account Profile view tab.

NOTE: The fields that appear in the Account Profile form depend upon which Account Type field in the Account form at the top of the screen. All fields in the Account Profile form are editable.

- 5 In the Account Profile form, review field values and edit those needing modification.

You can track the best times to call on the account in the Best Times list.

- 6 Scroll down to the Best Times list, add a record, and complete the necessary fields.

The Activities list shows all of the activities associated with the account.

Viewing Account Hierarchies in Roll-up Views

End users can review the account and its parent organization, subsidiaries, contacts, opportunities and relationships to other entities in the graphical relationship hierarchy tree control available in the roll-up views. By drilling down on hypertext links on the hierarchy tree, end users can navigate to related views.

NOTE: If the account has not been added to a hierarchy tied to the user's position's organization (either default hierarchy or dynamic hierarchy), the hierarchy tree is not visible to the end user. Instead they see "The selected record is not included as part of your defined hierarchy. If you feel this is in error, please contact your system administrator." The administrator is responsible for associating positions with organizations and an organization with a hierarchy.

The Activities-Roll-up view shows all of the activities associated with the selected account and its children. End users can apply filters to the list to find specific activity records and save the filtered list.

To view aggregated activities for an account

- 1** Navigate to the Accounts screen.
- 2** From the Show drop-down list, select My Accounts.
- 3** Select an account and click the Activities-Roll-up view tab.

The associated account hierarchy appears on the right side of the screen. All activities associated with the account and all of its child accounts appear in the Activities-Roll-up list.

In the Activities-Roll-up List, you can:

- Drill down on an activity type to navigate to the Activities > Attachments view.
- Drill down on an account name to navigate to the Account > Contacts view.

NOTE: If you create an activity in the Activities screen and do not set the Account field, the activity will not appear in the Activities-Roll-up list.

To view the aggregated coverage team for an account hierarchy

- 1** Navigate to the Accounts screen.
- 2** From the Show drop-down list, select My Accounts.
- 3** Select an account and click the Coverage Team-Roll-up view tab.

The associated account hierarchy appears on the right side of the screen. All coverage team members associated with the account and all of its subsidiaries appear in the Coverage Team-Roll-up list.

In the Coverage Team-Roll-up list, you can:

- Drill down on a last name to navigate to the Employees screen.

- Drill down on an email address to open a blank email message addressed to the team member who has that address.

To view the aggregated opportunities for an account hierarchy

- 1** Navigate to the Accounts screen.
- 2** From the Show drop-down list, select My Accounts.
- 3** Select an account and click the Opportunities-Roll-up view tab.

The associated account hierarchy appears on the right side of the screen. All opportunities associated with the account and all of its child accounts appear in the Opportunities-Roll-up list.

In the Opportunities-Roll-up list, you can:

- Drill down on an opportunity name to navigate to the Opportunities screen.
- Drill down on an account name to navigate to the Account > Contacts view.

To view an aggregated list of contacts an account

- 1** Navigate to the Accounts screen.
- 2** From the Show drop-down list, select My Accounts.
- 3** Select an account and click the Contact-Roll-up view tab.

The associated account hierarchy appears on the right side of the screen. All contacts associated with the account and all of its child accounts appear in the Contacts-Roll-up list.

In the Contacts-Roll-up list, you can:

- Drill down on a last name to navigate to the Contacts screen.
- Drill down on an account name to navigate to the Account > Contacts view.
- Drill down on an email address to open a blank email message addressed to the contact who has that address.

Adding Category Information

End users can create categories to track additional account information. In creating a category, a user can:

- Define possible category values.
- Specify the relative importance of the category and each of its values.

By default, categories are visible system-wide. However, users can mark categories as private. Private categories are only visible to the user who created them.

To add category information for an account

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 Click the Categories view tab.
- 4 In the Categories list, add a record and complete the necessary fields.

Some of the fields in a Categories record are described in the following table.

Field	Comments
Category	The Pick Category dialog box displays previously categories. Select an existing category or create a new one.
Category Rank	Optionally, enter a number to indicate the importance of this category relative to other categories.
Private	If you do not want other users to see the category, select this field.
Value	The Category Values dialog box displays the values previously defined for the category. Select an existing value or create a new one.
Value Rank	Optionally, enter a number to indicate the importance of this value relative to other values.

Indicating an Affiliation Between an Account and a Contact

For accounts having multiple contacts, you associate contacts with an account using the Contact Affiliations view. One reason to indicate these affiliations is for greater efficiency in call reporting, as described in [“Recording Calls” on page 117](#).

NOTE: The records for contacts you want to affiliate must already exist in the system; you cannot add new contact from this view. For more information on adding contacts, see [“Adding a Contact” on page 58](#).

To indicate an affiliation between an account and a contact

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting the account, do not drill down on any hyperlinks. Doing so takes you to another view.

- 4 Click the Contact Affiliations view tab.
- 5 In the Contact Affiliations list, add a record and complete the necessary fields.

Some of the fields in a Contact Affiliations record are described in the following table.

Field	Comments
Direct	If a check mark appears in this field, profile data for the contact is routed to members of the team assigned to the <i>affiliated account</i> . If no check mark appears in this field, the profile data is routed only to the members of the team assigned to the contact. (Users who are connected to the server see the profile data regardless of whether a check mark appears in the field or not.)
Last Name	The contact affiliated with this account.

End users can track a contact's importance within an account by defining their role in the Roles list. Users can then refer to this information prior to calls and adjust their discussions accordingly.

To add a new role for an affiliated contact

- 1 Affiliate an account with a contact as described in the previous procedure, "[To indicate an affiliation between an account and a contact.](#)"
- 2 Scroll down to the Roles list, add a record, and complete the necessary fields.

Indicating Affiliations Between Accounts

In addition to specifying affiliations with contacts, accounts can also have affiliations with one another. For example, a hospital can have affiliations with certain pharmacies and referring clinics. Users can use the Account Affiliations view to indicate affiliations between accounts and to indicate whether the relationship is an upward or downward affiliation.

NOTE: Do not use the Account Affiliations view to indicate a child account of an account, such as a department within a hospital or a subsidiary of an account. To specify this kind of association, see "[Adding Subaccounts](#)" on page 203.

The Account Affiliations view includes two lists users can use to distinguish between *upward* (or peer affiliations) and *downward affiliations*:

- **Upward or Peer Affiliations list.** Add an account to this list if it is the *agent* of the affiliation.
- **Downward Affiliations list.** Add an account to this list if it is the *object* of the affiliation.

To indicate an affiliation between accounts

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.

- 3 In the Accounts list, select an account.

NOTE: When selecting the account, do not click a hyperlink (underlined field). Doing so takes you to another view.

- 4 Click the Account Affiliations view tab.

- 5 In Account Affiliations view, scroll down and select one of the following lists:

- **Upward or Peer Affiliations.** Indicates an affiliation in which the selected account is the agent of the affiliation, such as an organization responsible for referring patients to another hospital.
- **Downward Affiliations.** Indicates an affiliation in which the selected account is the object of the affiliation, such as an organization receiving referrals from another hospital.

NOTE: If the relationship between the accounts is generic or unknown, select the Upward or Peer Affiliations list.

- 6 In the appropriate list, add a record and complete the necessary fields.

- 7 In the Add Accounts dialog box, select one or more accounts and click OK.

The selected accounts are added to the list. Each account's name becomes a hyperlink.

- 8 Optionally, select a value for the Relationship field. The default value is None Specified.

NOTE: It is recommended that you *not* select *Subsidiary* in the Relationship field to indicate a subaccount. If the affiliated account is a subsidiary, delete the newly added record and use the procedure in [“Adding Subaccounts” on page 203](#).

To view an account's upward and downward account affiliations

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select Explorer.

- 3 Expand the account for which you wish to view upward and downward affiliations.

Adding Subaccounts

Some accounts may have child accounts or subaccounts; for example, a hospital can have several departments or clinics. End users can add subaccounts for existing accounts using the Sub Accounts view. End users can also use this view to indicate affiliations between contacts and subaccounts.

Once a user has created a subaccount, it can be viewed and modified in any of the views in the Accounts screen. All accounts—parent accounts and child subaccounts—exist as separate accounts in the system. In the Account Explorer view, however, a subaccount appears under its parent, reflecting the hierarchical relationship between the two.

[Table 10](#) describes how parent and subaccount team membership affect account data access. Users assigned to a parent account team but not to a subaccount team, only have partial access to subaccount data. In contrast, users assigned to a subaccount team but not to the parent account team, have no access to the parent account except to the account name.

Table 10. Access to Account and Subaccount Data

	Assigned Only to Parent Account's Team	Assigned Only to Subaccount's Team
Access to Parent Account Data	Full access	Partial access, account name only
Access to Subaccount Data	Partial access	Full access

NOTE: Do not use the Account Sub Accounts view to indicate affiliations between independent accounts, such as a hospital and a referring clinic. For more information on establishing this type of association, see [“Indicating Affiliations Between Accounts”](#) on page 201.

To add a subaccount

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting the account, do not click a hyperlink (underlined field). Doing so takes you to another view.

- 4 Click the Sub Accounts view tab.
- 5 In the Sub Accounts list, add a record and complete the necessary fields.

Some of the fields in a Sub Accounts record are described in [Table 11](#).

Table 11. Some of the Fields in a Subaccounts Record

Field	Comments
Account Team	Multiple people can be assigned to the account's team. The team member who created the record is indicated as primary.
Name	Name of the subaccount.
Site	A unique location identifier that distinguishes this account from any other accounts with the same name. For example, enter a city or county name in this field to uniquely identify a hospital.

NOTE: To enter detailed data for a subaccount (such as activities and best times to call), drill down on the Name field and complete the fields in the various views in the Account Profile view.

To indicate an affiliation between a contact and a subaccount

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting the account, do not click a hyperlink (underlined field). Doing so takes you to another view.

- 4 Click the Sub Accounts view tab.
- 5 In the Sub Accounts list, select a subaccount.
- 6 Scroll down to the Contact Affiliations list, add a record, and complete the necessary fields.

Some of the fields in a Contact Affiliations record are described in the following table.

Field	Comments
Direct	If a check mark appears in this field, profile data for the contact is routed to members of the teams assigned to the <i>affiliated account</i> . If no check mark appears in this field, the profile data is routed only to the members of the team assigned to the contact. (Users who are connected to the server see the profile data regardless of whether a check mark appears in the field or not.)
Last Name	The contact affiliated with this subaccount.
Role	Reflects the contact's relative importance within the subaccount.

Viewing Pre-call Information

The Pre-Call view tab is a single view that provides end users with a thumbnail view of important information related to an account. Users can access this view prior to making a call to get a summary of key information about the account they are about to visit.

To view pre-call information

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.

NOTE: When selecting an account, do not click a hyperlink (underlined field). Doing so takes you to another view.

- 4 Click the Pre-Call view tab.

The Pre-Call view appears, displaying the lists described in the following table.

List	Comments
Product Sales	Product sales information associated with the account.
Contact Affiliations	Lists all contacts affiliated with the account. This list can also be populated in the Contact Affiliations view tab. For more information, see “Indicating an Affiliation Between an Account and a Contact” on page 200.
Activities	Features a historical list of all activities associated with the account. For more information on working with activities, see “Creating Activities” on page 97.

- 5 Optional: Select the Contact Affiliations or Activities lists, add a record, and complete the necessary fields.

Adding Plan and Formulary Information

Managed-care account managers can use the Account Plan Formulary view to enter and maintain information about plan designs and formularies at an account and the products on those formularies. They can associate P & T committee members and track formulary review dates to be well prepared for calling on their contacts within the accounts.

To add plan information to an account

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select an account.
- 4 Click the Plan Formulary view tab.
- 5 In the Plan Design list, add a record and complete the necessary fields.

Some of the fields in the Plan Design record are described in the following table.

Field	Comment
% of Total Lives	Equal to [(Number of Lives at Plan Level) divided by (Number of Lives at Account Level)] multiplied by 100.
No. of Lives	Number of lives in the plan. This number cannot exceed the number of lives entered for the account. Note: The total number of lives must be defined in the Account form before you enter a value in this field. For more information, see “Adding an Account” on page 194.
P & T Members Name	Names of contacts who are on the Pharmacy & Therapeutics committee and their roles.
Pharmacy Distribution	Type of distribution, such as in-house, contracted, or mail-order.
Utilization	Number of plan members who are using plan benefits. This number cannot exceed the number of lives in the plan.
Utilization %	Equal to [(Utilization) divided by (Number of lives at Plan Level)] multiplied by 100.

To add formulary information to an account

- 1 Navigate to the Plan Formulary view tab.

For information on how to navigate to the Plan Formulary view, see [“To add plan information to an account” on page 207.](#)

- In the Plan Design list, select a plan.
- In the Formularies list, add a record and complete the necessary fields.
Some of the fields in the Formularies record are described in the following table.

Field	Comment
Type	May be Open, Closed, or Limited.
Market	A required field. The option selected in this field determines which products are available in the Products list.

- In the Products list, add a record and complete the necessary fields.

By adding a product to the Product list you indicate it is on formulary and can track its status.

NOTE: You cannot edit the Competitor field. A check mark appears in this field if the product you selected for the Name field is a competitor's product. For more information, see [“Specifying a Competitor” on page 187](#).

Repeat [Step 3](#) and [Step 4](#) until you have added a record for every product on the formulary.

Associating Contact Information to Plans

Managed-care account managers can associate contacts to plans. This contact information may be entered either by the representative for the account or imported from external sources. The primary care representative can update information about a contact's plan affiliations and roles on the Pharmacy & Therapeutics (P & T) committees.

To associate contacts with account plans

- Navigate to the Accounts screen.
- From the Show drop-down list, select My Accounts.
- In the Accounts list, select an account.
- Click the Contacts by Plan view tab.

- 5 In the Plan Design list, query for the plan to which you want to associate a contact.
- 6 In the Plan Contacts list, click New to add a record for a contact.
Some of the fields in the Plan Contact record are described in the following table.

Field	Comment
Last Name	The last name of the contact.
Role	The contact's role in the plan.

To update a contact's role

- 1 Navigate to the Contacts by Plan view tab.

NOTE: For information on navigating to the Contacts by Plan view, see [“To associate contacts with account plans”](#) on page 208.

- 2 In the Plan Design list, query for the account plan with which the contact is associated.
- 3 In the Plan Contacts list, click Query to find the contact by Last Name.
- 4 Edit the role field for the contact.

Tracking Documentation Associated with an Account

Clinical research associates can use the Document Tracking view to review and track documents associated with an account.

To track documentation associated with an account

- 1 Navigate to the Account screen.
- 2 In the Accounts list, select the account for which you want to track documentation.

- 3 Click the Document Tracking view tab.

A list of documents associated with the account appear.

- 4 Query for the document of interest and complete the necessary fields.

Some of the fields in a Document Tracking record are described in the following table.

Field	Comments
Activity	By default, the activity is Document.
Assigned To	The person to whom responsibility for the document has been assigned.
Expected Date	The date that the signed document is expected to come back from the account.
Expiration Date	The date the document expires.
Lock Assignment	Determine whether the Lock Assignment field should be selected. If the activity is locked, Assignment Manager will not access it. If it is unlocked, Assignment Manager can reassign it.
Name	The name of the document. This field is a hypertext link to the Attachments tab.
Received Date	The date that the signed document returns from the account.
Sent Date	The date that the document is sent to the account.

Clinical research associates can also create a documentation tracking activity and attach a document. For more information, see [“Tracking Documentation Associated with a Contact” on page 69](#). For information on associating electronic documents to accounts, see [“Creating Documentation Tracking Activities” on page 305](#).

A *Smart Call* is a template that users can apply to contact calls and account calls to simplify and speed up the call-reporting process. A Smart Call defines a set of information about the products detailed, samples and promotional items distributed, and issues discussed on a call.

Smart Calls can be also be used for calls related to a particular campaign or promotional effort, or for everyday call reporting. They are intended for situations where sales representatives report details about a number of calls that are identical in content (the same products are detailed in the same order, the same samples are dropped, and so on).

This chapter describes how to create and modify Smart Calls. Using the procedures given in this chapter, you will be able to perform the administrator tasks of creating a new Smart Call template and then making it available to end users. Using the Smart Calls screens, end users can also create new Smart Call templates, enter Smart Call information, and modify Smart Call information after it has been applied to a call.

For more information on the differences between administrator and end-user tasks see [“Business Scenarios” on page 214](#).

Business Scenarios

This section outlines an example of workflow performed by the Siebel administrator and end users. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company is bringing a new product to market. The Siebel administrator adds this new product into the database and then creates a Smart Call template to distribute to the sales representatives in the field. The administrator then makes the Smart Call available to representatives in the field.

Once the Smart Call has been defined and made public, field sales representatives then apply it to their contact calls and account calls. By applying a Smart Call template, the representatives can automatically fill in various pieces of information in the Contact Call and Account Call Detail views, such as the products they detail, the samples they drop, and information they should provide. Representatives can also create Smart Call templates that suit their individual purposes. These end-user Smart Calls are only visible to each Smart Call creator.

The Siebel administrator requires administrative responsibilities in Siebel Smart Calls to:

- Create a new Smart Call and enter Smart Call information
- Make a Smart Call template available to end users

The end users are sales representatives in the field. They enter information to:

- Create Smart Call templates and enter Smart Call information
- Apply a Smart Call template to an account or contact call
- Modify Smart Call information after it has been applied to a call

Figure 5 and Figure 6 illustrate the workflows for these business scenarios.

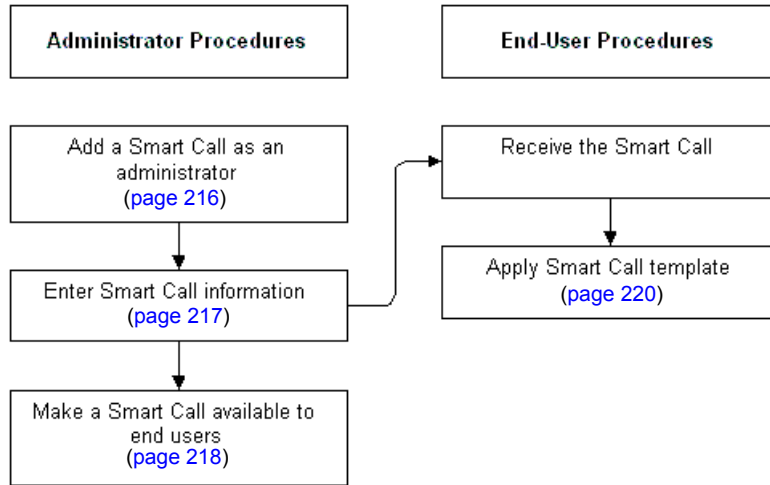


Figure 5. Administrator Creates Smart Call Templates

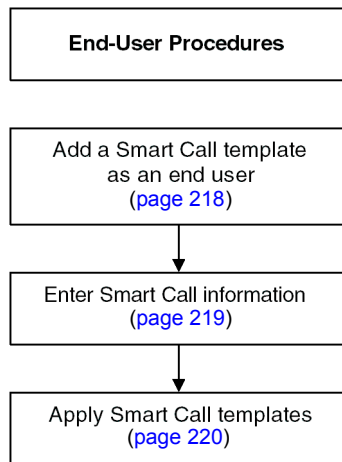


Figure 6. End User Creates Smart Call Templates

Administrator Procedures

The following administrator procedures are described in this section:

- [To add a Smart Call as an administrator](#)
- [To enter Smart Call information as an administrator on page 217](#)
- [To make a Smart Call template available to end users on page 218](#)

By default, a Smart Call is accessible only to the user who created it. However, the Siebel administrator can make a Smart Call available to users system-wide by using the Smart Call Administration view. The administrator can also add and modify Smart Calls using the Application Administration, Smart Call Detail view.

NOTE: Both end users and the Siebel administrator can add and modify Smart Calls using the views in the Smart Calls screen. For more information, see [“End-User Procedures” on page 218](#).

To add a Smart Call as an administrator

- 1** From the application-level menu, choose View > Site Map > Application Administration > Smart Calls.
- 2** In the Smart Call form, add a record and complete the necessary fields.

Some of the fields in a Smart Call record are described in the following table.

Field	Comments
Created By Name	The user who created the Smart Call.
Expense	This amount will appear in the Cost field of the contact call or account call. For more information, see “Creating a Contact Call” on page 108 and “Creating an Account Call” on page 112 .
Name	Name of the Smart Call.

Enter information in the Smart Call Detail screen, as described in the next procedure.

NOTE: Deleting a Smart Call permanently removes the Smart Call from the system. Before you delete a Smart Call, make sure that it is no longer needed. Calls that were completed using a deleted Smart Call are not affected.

To enter Smart Call information as an administrator

- 1** From the application-level menu, choose View > Site Map > Application Administration > Smart Calls.
- 2** In the Smart Calls list, drill-down on a Smart Call name.
- 3** In the Smart Call Detail view, select any of the four lists:
 - Call Products Detailed
 - Samples Dropped
 - Promotional Items Dropped
 - Issues

NOTE: You may not need to enter information in every one of these lists.

- 4** For the appropriate lists, add a record and complete the necessary fields.
Some of the fields in the Smart Call Detail view lists are described in the following table.

Field	Comments
Name	The name of the samples or promotional items dropped during the call. This field appears in the Call Products Detailed and Promotional Items Dropped lists.
Quantity	The quantity of samples or promotional items dropped during the call. This field appears in the Call Products Detailed and Promotional Items Dropped lists.

To make the Smart Call available to users, see the next procedure.

To make a Smart Call template available to end users

- 1 From the application-level menu, choose View > Site Map > Application Administration > Smart Calls.
- 2 In the Smart Calls list, select the Smart Call that you want to make available to end users.
- 3 Click the Private field to clear the check mark.

NOTE: Mobile end users must synchronize before they can access or modify a Smart Call.

End-User Procedures

The following end-user procedures are described in this section:

- [To add a Smart Call as an end user](#)
- [To enter Smart Call information as an end user on page 219](#)

Adding a Smart Call

By default, a newly created Smart Call is private; that is, it is available only to the user who created it. The Siebel administrator can make a Smart Call available to users. For more information, see the procedure [“To make a Smart Call template available to end users” on page 218](#).

NOTE: For account calls where attendees are specified, users can also apply a Smart Call to each of the attendees. For more information, see the Smart Call field descriptions in [“To add a contact call from the Activities screen” on page 109](#) and [“To add an account call from the Activities screen” on page 112](#).

To add a Smart Call as an end user

- 1 Navigate to the Smart Calls screen.

- 2** In the Smart Calls list, add a record and complete the necessary fields.

Some of the fields in a Smart Calls record are described in the following table.

Field	Comments
Created By Name	The user who created the Smart Call.
Expense	This amount will appear in the Cost field of the contact call or account call. For more information, see “Creating a Contact Call” on page 108 and “Creating an Account Call” on page 112 .
Name	Name of the Smart Call.

Enter information in the Smart Call Detail view as described in the next procedure.

NOTE: Deleting a Smart Call permanently removes the Smart Call from the system. Before you delete a Smart Call, make sure that it is no longer needed. Calls that were completed using a deleted Smart Call are not affected.

To enter Smart Call information as an end user

- 1** Navigate to the Smart Calls screen.
- 2** In the Smart Calls list, select a Smart Call.
- 3** Click the Smart Call Detail view tab.
- 4** Make sure that the correct Smart Call appears in the Smart Call form.
- 5** Select any of the four lists in the Smart Call Detail view:
 - Call Products Detailed
 - Samples Dropped
 - Promotional Items Dropped
 - Issues

NOTE: You may not need to enter information in every one of these lists.

- 6 Add a record and complete the necessary fields.

Some of the fields in the Smart Call Detail lists are described in the following table.

Field	Comments
Name	The name of the samples or promotional items dropped during the call. This field appears in the Call Products Detailed and Promotional Items Dropped lists.
Quantity	The quantity of samples or promotional items dropped during the call. This field appears in the Call Products Detailed and Promotional Items Dropped lists.

NOTE: To protect system integrity and make sure users enter the correct information, users cannot enter dates and reference numbers for samples with Smart Calls. For more information on entering information on dropped samples, see [“Recording Contact Calls” on page 124](#) and [“Recording Account Calls” on page 129](#).

About Applying a Smart Call Template to a Call

Users apply a Smart Call template by making a selection from the Smart Call field in the Contact Call Detail and Account Call Detail views. For more information, see the field descriptions in [“To add a contact call from the Activities screen” on page 109](#) and [“To add an account call from the Activities screen” on page 112](#).

NOTE: Once a user applies a Smart Call template to a call, they can make additional edits to any fields in the current view.

The views in the Analysis screen present sales, prescription, and call detailing data in an accessible format. These views allow you to evaluate your performance and determine where to focus your sales activities.

Much of the data displayed in these views derives from syndicated data.

NOTE: All the views in the Analysis screen are read-only.

The terms *direct sales* and *indirect sales* are used in some views of the Analysis screen as follows:

- **Direct sales.** Refers to product sales directly from your company to accounts.
- **Indirect sales.** Refers to product sales from wholesalers to accounts.

Business Scenario

This section outlines an example of workflow performed by the Siebel administrator and end users. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company has bought syndicated data concerning its retail product sales. This syndicated data is displayed in most of the Siebel Life Sciences Analysis views.

Periodically, the Siebel administrator extracts portions of the syndicated data and distributes it according to territory assignments. As part of this process, the Siebel administrator updates responsibilities, which affect the data that can be viewed by an individual, and updates payer and plan information.

In order to use the new information, the application user must download the syndicated data updates.

Example Workflow for Analysis

This section details sample tasks often performed by administrators and end-users working with the Analysis screen. Your company may follow a different workflow according to its business requirements.

Administrator Procedure

The following administrative procedure is described in this section:

- **Add a payer.** For more information, see [“To add a payer” on page 224](#).

Other administrator procedures, applicable to the data used in the Analysis screen, are described elsewhere:

- **Load syndicated data.** For more information, see [“Loading Data into the Siebel Life Sciences Database” on page 421](#).
- **Extract portions of data according to territory assignments.** For more information, see [“To create a data extraction rule” on page 426](#).
- **Send the compressed data extracts to mobile users.** For more information, see [“To specify the data that is routed to mobile users” on page 427](#).
- **Update responsibilities (optional).** For more information, see *Applications Administration Guide*.
- **Associate position to bricks.** For more information, see [“Defining a Brick” on page 53](#).

End-User Procedures

The following list shows tasks end users typically perform using the Analysis screens:

- **Import syndicated data extracts.** For more information, see [“Importing Syndicated Data Files” on page 225](#).
- **Analyze Brick-Level Syndicated Data.** For more information, see [“Analyzing Brick-Level Syndicated Data” on page 228](#).

Defining Payer and Plan Information

You can use the Payer Administration view to define payer and plan information. This information appears in the plan and payment type–based views in the Analysis screen.

To add a payer

- 1 From the application level menu, choose View > Site Map > Application Administration > Payer.
- 2 Click the New button and complete the fields in the new record.

Some of the fields are described in the following table.

Field	Comments
Type	Required. Three types are supported: Total, Plan, and Payer.
Name	Required. Enter the name of the payer, plan, or payment type. If you selected Plan in the Type field, enter the plan name.
Account Name	If relevant, select the payer account, or add a new account for the payer in the Pick Account dialog box.
Account Site	Read-only. The location of the plan.
IMS Id	The identifier assigned to the plan by the syndicated data provider.

End-User Procedures

The following end-user procedures are described in the section:

- [To import syndicated data extracts](#)
- [To display all contacts associated with a brick on page 229](#)
- [To correlate actual calls made with indirect sales by brick on page 229](#)
- [To correlate actual calls made with prescription trends by brick on page 229](#)
- [To display data with the views in the Analysis screen on page 230](#)

Importing Syndicated Data Files

If data extracts have been routed to you by the Siebel administrator, you will receive notification when you synchronize your local database. During synchronization, the data extracts are downloaded to your hard drive (as attachments), where they are stored until you import them. After you import the data into your local database, the files are deleted from your hard drive.

NOTE: If you want to postpone receiving data extracts until a later time, turn off the Retrieve Published Files option in your synchronization setup. To find this option, choose File > Synchronize, and then click Setup in the Siebel Remote dialog box.

To import syndicated data extracts

- 1 Navigate to Syndicated Data Files > Syndicated Data Files.

NOTE: Even if you postponed receiving data extract files by turning off the Retrieve Published Files option in your synchronization setup, this view displays records for all the files routed to you. Although the files are listed here, you *cannot* import them until you have received them during a subsequent synchronization.

- 2 Select one or more files and click Import.

The Syndicated Data Files view is cleared, and the data extract files that you received during synchronization are deleted from your hard drive.

Siebel Life Sciences Views

In Siebel Life Sciences, the availability of certain views can be limited according to each user's responsibilities. Therefore, the views you see may differ from those shown and described in [Table 12](#).

NOTE: Analysis data is read-only. Data refresh cycles are determined by your company's business process and data availability.

[Table 12](#) describes the functions of the views in the Analysis screen. Your responsibilities determine which views are available to you. To update responsibilities, affecting the data viewed by users, refer to *Applications Administration Guide*.

Table 12. Views Available from the Analysis Screen

View	Functions
All Markets > Direct Sales Trend by Territory - Volume	For managers, displays internal product sales data at the territory level over a selected period of time. Displays direct sales data for areas covered by their sales representatives.
All Markets > Direct Sales Trend by Account - Volume	For representatives, displays internal product sales data at the account level over a selected period of time.
All Markets > Indirect Sales Trend by Territory - Volume	For managers, displays product sales data at the territory level over a selected period of time. Allows managers to see indirect sales data for the areas covered by their sales representatives.
All Markets > Indirect Sales Trend by Territory - Share	For managers, displays product sales data at the territory level over a selected period of time.
All Markets > Indirect Sales Trend by Brick - Volume	For representatives, displays product sales data at the brick level over a selected period of time.
All Markets > Indirect Sales Trend by Brick - Share	For representatives, displays market share data at the brick level over a selected period of time.

Table 12. Views Available from the Analysis Screen

View	Functions
All Markets > Indirect Sales Trend by Postal Code - Volume	For representatives, displays product sales data at the ZIP Code level over a selected period of time.
All Markets > Indirect Sales Trend by Postal Code - Share	For representatives, displays market share data at the ZIP Code level over a selected period of time.
All Markets > Indirect Sales Trend by Account - Volume	For representatives, displays product sales data at the account level over a selected period of time.
All Markets > Indirect Sales Trend by Account - Share	For representatives, displays market share data at the account level over a selected period of time.
All Markets > Rx Trend by Territory - Volume	For managers, displays product Rx trends in a territory. Allows managers to see Rx trends for the areas covered by their sales representatives.
All Markets > Rx Trend by Territory - Share	For managers, displays product Rx trends in a territory.
All Markets > Rx Trend by Prescriber - Volume	For representatives, displays product Rx trends by prescriber.
All Markets > Rx Trend by Prescriber - Share	For representatives, displays product Rx trends by prescriber.
All Markets > Rx Trend by Plan and Territory - Volume	For managers, displays product Rx trends by plan and territory.
All Markets > Rx Trend by Plan and Territory - Share	For managers, displays product Rx trends by plan and territory.
All Markets > Rx Trend by Plan and Prescriber - Volume	For representatives, displays product Rx trends by plan and prescriber.
All Markets > Rx Trend by Plan and Prescriber - Share	For representatives, displays product Rx trends by plan and prescriber.
All Markets > Rx Trend by Payment Type and Prescriber	For representatives, displays product Rx trends by the payment types associated with prescriptions and prescribers.
All Markets > Rx Trend by Payment Type and Territory	For both representatives and managers, displays product Rx trends by the payment types associated with prescriptions.
Activities > Account Detailing	For both representatives and managers, shows the number of times a product was detailed during account calls, as well as the priority, or order, of the product details. Use this view to assess your product emphasis and plan your account calls.

Table 12. Views Available from the Analysis Screen

View	Functions
Activities > Contact Detailing	For both representatives and managers, shows the number of times a product was detailed during contact calls, as well as the priority, or order, of the product details. Use this view to assess your product emphasis and plan your contact calls.
Bricks > Bricks Rx Analysis > Rx trend by brick	For representatives, displays product prescription trends by brick. This data is for the entire brick that is selected in the Bricks list and is not related to any contact.
Bricks > Bricks Rx Analysis > Rx trend by brick-Product NRx	For representatives, displays new prescriptions for a given product by brick. This data is for the entire brick that is selected in the Bricks list and is not related to any contact.
Bricks > Bricks Rx Analysis > Rx trend by brick-Product TRx	For representatives, displays total prescriptions for a given product in a given period by brick. This data is for the entire brick that is selected in the Bricks list and is not related to any contact.
Bricks > Bricks Sales Analysis > Indirect sales by brick	For representatives, displays indirect sales data at the brick level for the brick selected on the Bricks list.
Bricks > Bricks Sales Analysis > Indirect sales trend by product value	For representatives, displays indirect sales data at the brick level for the selected product and for the brick selected on the Bricks list.
Bricks > Bricks Sales Analysis > Indirect sales trend by product units	For representatives, displays indirect sales data at the brick level for the selected product unit and for the brick selected on the Bricks list.

Analyzing Brick-Level Syndicated Data

End users can analyze syndicated data that is associated with a brick. They can also analyze activities, such as calls, associated with an account or contact within a brick. Using the brick-level analysis views, end users can correlate those activities with prescription or sales trends.

The data that appears in the Analysis screen > Bricks is determined by the user's position and the Bricks that the administrator has associated with that position. For more information, see [“Defining a Brick” on page 53](#).

To display all contacts associated with a brick

- 1 Navigate to Analysis > Bricks.
- 2 Select a brick in the Bricks list.
- 3 Click on the Contacts view tab.

The Contacts applet displays all contacts associated with the selected brick.

To correlate actual calls made with indirect sales by brick

- 1 Navigate to Analysis > Bricks.
- 2 Select a brick in the Bricks list.
- 3 Click on the Indirect Sales by Brick view tab.
- 4 Select a record and click the actual calls button.

The list shows the number of account calls submitted for the selected product and period. Remember to select a record that contains your company's product in order to see the activity data.

To correlate actual calls made with prescription trends by brick

- 1 Navigate to Analysis > Bricks.
- 2 Select a brick in the Bricks list.
- 3 Click on the Rx Trend by Brick view tab.
- 4 Select a record and click the actual calls button.

The list shows the number of account calls submitted for the selected product and period. Remember to select a record that contains your company's product in order to see the activity data.

Working with Sales, Rx, and Call Data

The views in the Analysis screen display prescriber, account, plan, payer, and territory level sales and Rx data, as well as call data. These views provide the capability to view data in both list and chart formats.

To access any of the views listed in [Table 12 on page 226](#), navigate to the Analysis screen default Analysis view, select the appropriate market in the All Markets list, and then select the desired view from the view tabs.

A list format appears by default when you select a view from the Analysis view tabs. You can view your sales and Rx data numbers in a chart format by clicking the toggle button.

The data in the Analysis screen must be updated periodically. Mobile users must download files that have been extracted and sent by the Siebel administrator and then import the new data into their local databases. For more information, see [“To import syndicated data extracts” on page 225](#).

To display data with the views in the Analysis screen

- 1 Navigate to the Analysis screen.
- 2 Select the appropriate market (therapeutic class) in the All Markets list.

NOTE: You can select a different market at any time in all views in the Analysis screen, except in the Activities subviews (the Account Detailing Analysis and Contact Detailing Analysis views).

- 3 Click a category from the view tabs.

- 4 Display only the sales, Rx, or call data you want to view using query by example or targeting.

See [Chapter 4, “Planning Calls,”](#) for information on targeting.

NOTE: By default, Siebel ePharma displays (and charts) all available data appropriate to the selected Analysis view. Siebel Systems recommends that you always filter your data lists to make the displayed data more meaningful. The charts in the Account Detailing Analysis and Contact Detailing Analysis views display all calls, regardless of status, unless you filter the data in the upper list.

- 5 Select a chart type from the drop-down list to specify which type of chart you want to use for viewing the selected data.

Examples of available chart types include 3D stacked bar, 3D bar, and 2D bar.
- 6 Zoom in on data or limit the chart to particular data points by hovering the mouse cursor over the chart element (a bar or pie segment) to see the data only for that chart element. To return to the complete set of data for the original chart, execute a new query.

Using Analysis

End-User Procedures

Tracking Time Off Territory **10**

In order to better manage their sales and field personnel, pharmaceutical companies need a way to measure and track the amount of time individuals take off.

This chapter describes how to use Siebel ePharma Time Off Territory (Siebel Time Off Territory) to record blocks of time that a sales representative or field person spends on activities not directly associated with an account, a contact, or an opportunity. Using the procedures given in this chapter, you will be able to perform the end-user tasks of adding and submitting a territory record.

About Time Off Territory

A time off territory is any block of time during normal business hours in which sales representatives are out of their territories. Examples of time off territory include field trainings, national sales meetings, sick leave, vacation, or personal activities such as doctor's appointments.

Companies can use time off territory information to track the time that remote sales and field personnel spend on activities that do not directly relate to accounts, contacts, or opportunities. Companies can use this information to:

- Maintain a record of field employee time such as vacation and sick days
- Evaluate market penetration based on territory coverage and to assess the effectiveness of field personnel

Using the views in the Time Off Territory screen, users can record blocks of time that should not be included in call-frequency reporting. In addition, they can enter and record past and future time off information, including the duration, reason, date, and description of the time off territory event.

Because time off territory is actually a type of activity in Siebel ePharma, time off territory records appear in the Activities screen and in views that display activities. For more information activities, see [“Creating Activities” on page 97](#).

Business Scenario for Time Off Territory

This scenario is an example workflow performed by two types of end users, a field sales representative and his or her regional sales manager. Your company may follow a different workflow according to its business requirements.

Susan Porter is a sales representative for a pharmaceutical company. Susan has been invited to a two-day, out of town seminar. She speaks to her manager and they decide she should attend it. Susan uses Time Off Territory to record why her territory will not be worked on the days on which the seminar will take place. Once she submits the information, her manager has a record of where she is and why she is gone.

Example Workflow for Tracking Time Off Territory

This section details sample tasks often performed by end-users when tracking time off territory. Your company may follow a different workflow according to its business requirements.

When tracking time off territory, end users typically perform the following tasks:

- **Create a new time off territory record.** Typically, the sales representative creates a record for all of the days she will be attending the seminar. For more information, see [“Adding a Time Off Territory Record” on page 237](#).
- **Submit the time off territory record.** For more information, see [“Submitting a Time Off Territory Record” on page 238](#).

The regional sales manager would use Siebel Time Off Territory to:

- **View time off territory charts.** The regional sales manager can review the time off territory records that have been submitted to the system. For more information, see [“Viewing Time Off Territory Charts” on page 239](#).

Once the sales representative submits a time off territory record to the system, Siebel ePharma:

- **Adds a new time off territory record to the Activities list.** For more information on creating new activities, see [“Creating Activities” on page 97](#).
- **For each time off territory record, creates an all-day appointment in the calendar.** For more information on using the calendar, see [“Creating a General Activity in the Calendar” on page 100](#).

End-User Procedures

The following end-user procedures are described in this section:

- [To add a time off territory record](#)
- [To submit a completed time off territory record on page 238](#)
- [To view time off territory charts on page 239](#)

NOTE: Siebel Time Off Territory includes two filters for displaying time off territory records: My Time Off Territory and My Team's Time Off Territory. Each user's responsibilities determines which of these views are available.

Adding a Time Off Territory Record

End users must add at least one time off territory record for business days that they spend on activities not directly related to an account, contact, or opportunity. A single time off territory record can represent one or many days. Multiple time off territory records can represent different activities performed on a single day. For example, a user could add one record for a conference attended in the morning and another for vacation time taken in the afternoon.

To add a time off territory record

- 1** Navigate to the Time Off Territory screen.
- 2** From the Show drop-down list, select My Time Off Territory.
- 3** In the More Info form, add a record and complete the necessary fields.

Some fields in a Time Off Territory record are described in the following table.

Field	Comments
Description	Describes the reason for the time off.
End Time	The time when this territory time off activity ends.

Field	Comments
Hours	Represents duration of the time off request. The application automatically calculates this value when you enter or update the Start Time and End Time fields.
Start Time	The time when this territory time off activity starts.
Status	The status of a time off request. End users cannot select Submitted. For more information on changing the status of a record to Submitted, see “Submitting a Time Off Territory Record” on page 238 .

Submitting a Time Off Territory Record

End users must submit a time off territory record for the information to be included in ROI (return on investment) analyses and expense reports. Once a time off territory record has been submitted, it can no longer be modified or deleted.

To submit a completed time off territory record

- 1 Navigate to the Time Off Territory screen.
- 2 From the Show drop-down list, select My Time Off Territory.
- 3 In the More Info form, select the record you want to submit.
- 4 To include the time off territory expense in an expense report generated by the Siebel Expenses, you must:
 - In the Time Off Territory list, specify an a start time.
 - In the Activities screen, enter a cost estimate and select the Expense flag. For more information, see [“Creating Activities” on page 97](#).
- 5 In the More Info form, click Submit and then OK.

Once a time off territory record has been submitted, Siebel ePharma:

- Changes the status of the time off territory record to Submitted.
- Adds a new time off territory record to the Activities list. For more information on activities, see [“Creating Activities” on page 97](#).

- Creates an appointment in the calendar for each submitted record. For more information on using the calendar, see [“Creating a General Activity in the Calendar” on page 100](#).
- Routes the time off territory request to the manager.

Viewing Time Off Territory Charts

Users can view graphical charts of time off territory information by clicking the Charts view tab. Using these charts is an effective way see trends and patterns.

To view time off territory charts

- 1 Navigate to the Time Off Territory screen.
- 2 From the Show drop-down list, select My Team’s Time Off Territory.
- 3 Click the Charts view tab.
- 4 From the Show drop-down list, select how you want the information to be displayed:
 - **TOT by Reason.** Displays the number of hours spent off territory each month, by reason.
 - **TOT by Creator.** For managers. Displays the aggregate and incremental number of hours spent off territory.
- 5 From the By drop-down list, select how you want the information to be displayed.

Configuring Time Off Territory

Most of the procedures in Siebel Time Off Territory are end-user related. However, the Siebel administrator may want to:

- Create an approval process and develop alerts so that managers will be notified when sales representatives submit Time Off Territory records. For more information, see the message broadcasting chapter in *Applications Administration Guide*.
- Enter additional selections to the Reason drop-down list. For more information, see *Applications Administration Guide*.

To minimize the volume of data that is routed to the manager's remote client, Time Off Territory records that are created by remote users are visible to their managers only when they are connected to the server. If the Time Off Territory records of a manager's team need to be routed to the remote client, the following steps must be followed, with assistance from your Siebel representative.

To amend routing rules for Time Off Territory records

- 1** As a precaution, create a backup of the database.
- 2** From the application-level menu, choose Start > Programs > Siebel ePharma application and right-click on Properties.

You can also access Properties by right-clicking the Siebel ePharma application icon on your desktop.
- 3** On the Properties dialog box, in the Target field add the following after epharma.cfg: /editseeddata.

Be sure to include a space after epharma.cfg
- 4** Launch the application and log in as Sadmin.
- 5** From the application-level menu, choose View > Site Map > Siebel Remote Administration > Routing Models.
- 6** In the Routing Models form, query for MOBILE.CLIENT-STANDARD in the Name field.

- 7** In the Routing Rules Excluded list, query for Activity in the Dock Object Name field and Sea-11 or EmpMgr:S_EVT_ACT.PERFRM_BY_PER_ID in the Name field.

The query returns two records.

- 8** Stop the Siebel Server.
- 9** Create a new database template by running the Generate New Database server task.
- 10** Re-extract for the remote users who are affected by this change.

Tracking Time Off Territory

Configuring Time Off Territory

Managing MedEd Events **11**

This chapter describes how a pharmaceutical company can use Siebel ePharma Medical Education (Siebel MedEd) to plan all aspects of a medical education event. A medical education event can be as simple as a “lunch-and-learn” in a physician’s office or as complex as a seminar series or national sales meeting.

Using the procedures given in this chapter you will be able to perform the administrator tasks of setting up funding for MedEd plans, creating templates for activities, making literature selections available to end users, and designating contacts as MedEd speakers. After these administrative tasks have been completed, end users can then use Siebel MedEd to define MedEd plans, set up MedEd events and sessions, and invite and register event attendees.

Siebel MedEd provides a single repository of medical event information to allow administrators and end users to:

- Plan and execute events
- Track allocated event budgets
- Compare allocated budgets to actual event costs

For more information on the differences between administrator and end-user tasks see [“Business Scenario” on page 245](#).

MedEd Terminology

Before reading further, you should understand the terminology specific to the Siebel MedEd application. This chapter includes the following MedEd-specific terminology:

- **Event or MedEd event.** Refers to a promotional or educational event attended by physicians or medical professionals. An event may consist of single or multiple-sessions and functions as a forum for exchanging information on a particular disease, illness, therapeutic class, or product.
- **Session.** Refers to a single class or meeting attended by one or more participants as part of a particular MedEd event.
- **MedEd Team.** Refers to a group of people from various departments or sales teams who are primarily responsible for the planning, execution, and funding of a MedEd event.
- **Plan.** Refers to a hierarchical collection of MedEd events focused on delivering a specific set of objectives and sharing common funding. For example, the objective might be promotion of a new indication, to gain awareness and increase market share for a particular product. A plan may display aggregated actual cost and attendee information related to every event associated with that plan.

About MedEd Event Types

A MedEd event can be any type or promotional or education event attended by physicians or medical professionals. From a corporate perspective, MedEd event types include:

- **Sales Representative Level.** Executed by a manager or one or many sales representatives in the field.
- **Corporate or National Level.** A national training or meeting targeted at a specific group of medical professionals.

Depending upon the needs of their environment, users can plan events at the national level for either a specific product or time period and then allocate resources by region, district, or sales representative.

Business Scenario

This section outlines an example workflow performed by a Siebel MedEd administrator and end users. Your company may follow a different workflow according to its business requirements.

A product manager at a pharmaceutical company is responsible for increasing the market share of a new product. To accomplish this objective, he uses Siebel MedEd to plan various dinners, symposiums, and lunch-and-learn meetings to communicate the budgets and objectives. In Siebel MedEd, he creates a MedEd plan and then defines how much money each sales representative will be given to drive events within the district. In the process of creating sub plans, the product manager allocates a budget and assigns the teams who will be responsible for event planning and execution.

Sales representatives in the field use Siebel MedEd to see the events and plans to which they have been assigned, itemize the tasks they need to accomplish, invite various contacts, record expenses, develop the meetings agendas, associate speakers, add materials, and manage the overall calendar of events in his or her territory. Over time, the product manager can closely monitor whether his team is executing on-time and within budget by comparing each event's allocated budget with the actual costs.

In this scenario, the product manager is responsible for administrating Siebel MedEd so that end users can plan, track, and execute medical events. As the MedEd administrator, he requires administrative responsibilities in Siebel MedEd to:

- Establish funds for a MedEd plan
- Create MedEd activity templates
- Add MedEd literature items to the application
- Designate a contact as a MedEd speaker

The end users are the sales representatives and managers who execute MedEd events in the field. They enter information to:

- Set up a MedEd plan
- Set up MedEd events

Managing MedEd Events

Business Scenario

- Track the MedEd event costs
- Set up sessions within an a MedEd event to track speakers and associate literature and materials with the event
- Designate a contact as a MedEd speaker
- Invite and register MedEd event attendees

Example Workflow for Managing MedEd Events

This section details sample tasks often performed by administrators and end-users when managing MedEd events. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to manage MedEd events. The administrator may be the product manager who is responsible for using Siebel MedEd to plan a variety of events that feature the new product. These tasks are typically performed in the following order:

- 1 Establish funds for a MedEd plan.** For more information, see [“Establishing Funds for MedEd Plans” on page 249.](#)
- 2 Create a MedEd master plan.** For more information, see [“Creating Master MedEd Plans” on page 252.](#)
- 3 Create a MedEd activity template.** For more information, see [“Creating a MedEd Activity Template” on page 253.](#)
- 4 Add literature items to the application.** For more information, see [“Administering MedEd Literature” on page 255.](#)
- 5 Designate contacts as MedEd speakers.** For more information, see [“Designating MedEd Event Speakers” on page 256.](#)

End-User Procedures

The following list shows tasks end users typically perform when managing MedEd events. These tasks are typically performed in the following order:

- 1 Set up a MedEd plan.** For more information, see [“Setting Up a MedEd Plan” on page 258.](#)
- 2 Set up MedEd events.** For more information, see [“Setting Up MedEd Events” on page 260.](#)
- 3 Track MedEd event costs.** For more information, see [“Tracking Costs of MedEd Activities” on page 264.](#)

- 4 Set up event sessions to track speakers and associate literature with an event.** For more information, see [“Setting Up Sessions Within a MedEd Event” on page 267.](#)
- 5 Invite and register event attendees.** For more information, see [“Inviting and Registering Prospective MedEd Attendees” on page 270.](#)
- 6 Send correspondence to invitees.** For more information, see [“Generating Correspondence for MedEd Event Invitees” on page 272.](#)
- 7 Schedule calls to invitees.** Scheduled calls to event invitees appear in the Calendar. For more information, see [“Scheduling Calls to an Invitee” on page 272.](#)

Administrator Procedures

The following administrator procedures are described in this section:

- [To verify that a fund is available for association with a MedEd plan on page 251](#)
- [To create a MedEd master plan on page 252](#)
- [To create an activity template for a MedEd event on page 253](#)
- [To add a literature item to the application on page 256](#)
- [To designate a contact as a MedEd speaker on page 256](#)

Establishing Funds for MedEd Plans

A MedEd plan is a database record in which you specify common funding for a group of MedEd events that share a common objective. Each MedEd event can be funded by up to one MedEd plan for each event team member who is responsible for each event. Using the MedEd Activities view, you can track costs associated with each event. Because these events are automatically aggregated by plan, you can compare actual expenditures with MedEd plans across sales divisions.

Figure 7 shows the possible relationships between MedEd funds, master plans, subplans, events, sessions, activities, and invitees.

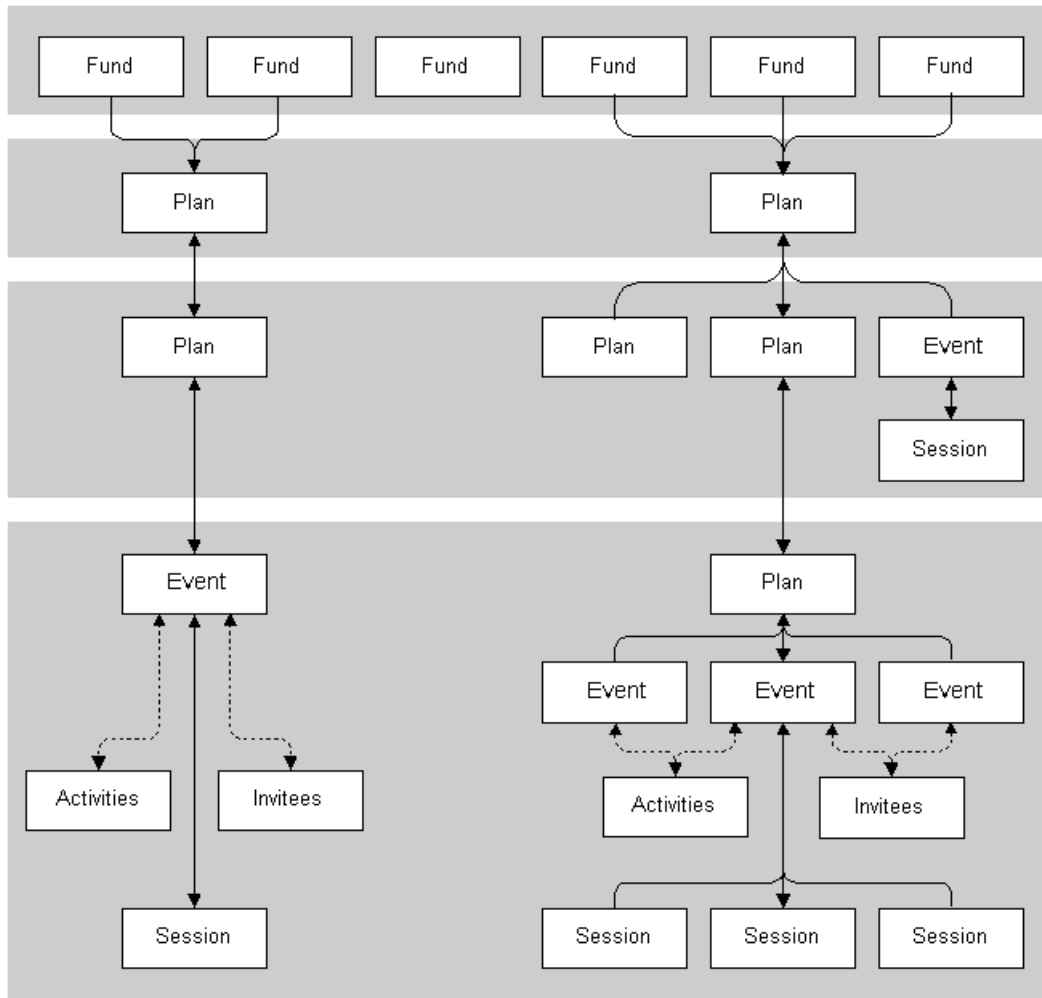


Figure 7. Relationships Between Funds, Plans, Events, Sessions, Activities, and Invitees

To establish a fund and associate it with a MedEd plan, you must:

- **Define an active period for the fund.** Define an active period that can be assigned to a fund. For more information on defining periods, see *Applications Administration Guide*.
- **Establish the fund.** Establish the fund by loading fund information into the database using Siebel Enterprise Integration Manager (EIM). To perform this task, you must consult the *Interface Tables Reference* to determine which columns are included in the database table EIM_MDF and how those columns map to the columns in the base table S_MDF. Then, use a standard SQL utility to place information about the fund you are establishing in the EIM_MDF table.

NOTE: If you want the fund to be active immediately, make sure that the current date falls between the start date and end date that you specify for the fund.

For more information on using EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

- **Verify fund availability.** Verify that the fund has been successfully established and is available for association with a MedEd plan. For more information, see the procedure [“To verify that a fund is available for association with a MedEd plan” on page 251](#).

To verify that a fund is available for association with a MedEd plan

- 1 From the application-level menu, choose View > Site Map > Data Administration > MedEd Planning.
- 2 In the Plans list, select a plan.
- 3 In the Plan Administration form, click the select button in the Funds field.
- 4 In the Funds dialog box, click New.

All active funds listed in the S_MDF table appear.

- 5 Verify the fund you want is available and then click Cancel.

Creating Master MedEd Plans

Administrators and managers create master MedEd plans to allocate funding resources and spending privileges to end users who perform tasks associated with a MedEd event. Each person who receives a funding allocation from a specific MedEd plan can create one or more subplans to further specify how the funds will be allocated. For more information on creating MedEd plans and subplans, see [“Setting Up a MedEd Plan” on page 258](#).

To create a MedEd master plan

- 1 From the application-level menu, choose View > Site Map > Data Administration > MedEd Planning.
- 2 In the Plan Administration form, add a record and complete the necessary fields.

Some of the fields in a Plan Administration record are described in the following table.

Field	Comments
Assigned To	Person responsible for carrying out the plan. Defaults to the current user name.
Budget	Amount of money authorized for spending under the plan.
Funds	One or more funds (cost centers) associated with the plan.
Objective	One or more purposes to be accomplished by holding MedEd events associated with the plan.
Period	Time period during which the plan is to be used.
Plan ID	An unique alphanumerical value identifying the plan. The application automatically assigns this value when you create the plan record.
Plan Name	Name for a plan that you want others to associate with MedEd events.
Products	Products to be promoted with the funds supplied under this plan.
Status	Indicates whether the plan is currently active or inactive.

Creating a MedEd Activity Template

Activity templates let you provide your MedEd event team with a list of standard activities required to successfully complete a particular type of event. Each activity plan for an individual event depends upon an activity template. Activity plans assist you in scheduling and assigning activities.

To create an activity template for a MedEd event

- 1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2 In the Activity Templates list, add a record and complete the necessary fields.

Some of the fields in an Activity Templates record are described in the following table.

Field	Comments
Description	Description of this activity template.
Name	The name of this activity template.
Type	The activity template type.

NOTE: Leave the Sales Stage, Sales Method, and Protocol Title fields blank. These fields do not apply to MedEd activities.

Associate individual activities with the template, as described in *Applications Administration Guide*.

NOTE: Lead times for MedEd activities are defined as the amount of time between the start date for an activity plan and the date that the selected activity should start.

MedEd Lists of Values

As you work with various MedEd records, you will find a number of fields that require you choose values from drop-down lists. [Table 13](#) lists the locations, field names, and values types of some MedEd drop-down lists.

Table 13. Lists of Values for MedEd Settings

Views	Field Name	List of Values Type	Comments
MedEd Events > More Info view tab	Accreditation	LS_ME_EVT_ACCREDIT_CD	Organizations that give Continued Medical Education (CME) credits for attending MedEd events.
	Dress Code	LS_ME_EVT_DRESS_CD	Appropriate types of dress for MedEd events.
	Status	LS_ME_EVT_STAT_CD	Status of MedEd events. Note: When the status is Completed, the event and its children records—such as Invitees, Sessions, Material, Activities, and Activity Plan—are locked. The status can only be unlocked by the administrator using the Data Administration screen > MedEd Event Details.
	Type	LS_ME_EVT_TYPE_CD	Types of MedEd events.
MedEd Events > Invitees view tab	Role	LS_ME_INV_ROLE_CD	Roles that invited contacts or employees may fill for MedEd events.
MedEd Events > Event Details view tab MedEd Events > Invitees view tab	Invitee Status	LS_ME_INV_STAT_CD	Status of invitees for MedEd events. When the status is Completed, the event and its children records—such as Invitees, Sessions, Material, Activities, and Activity Plan—are locked.

Table 13. Lists of Values for MedEd Settings

Views	Field Name	List of Values Type	Comments
MedEd Events > Invitees view tab > Sessions MedEd Events > Sessions view tab	Registration Status Status	LS_ME_SES_REG_STAT_CD	Status of invitees for individual sessions within MedEd events.
MedEd Events > Sessions view tab > Drill down on Session Name > Contacts list	Email	LS_ME_REG_EMAIL_CD	Status of email registration for an attendee.
MedEd Events > Event Details > Materials list	Item	LS_ME_SES_MAT_CD	Materials or equipment that may be needed for MedEd sessions.
MedEd Events > Sessions view tab > Sessions list	Status	LS_ME_SES_STAT_CD	Status of individual sessions within MedEd events.
MedEd Plans > More Info view tab MedEd Plans > Plan Explorer view tab	Plan Status	LS_ME_STAT_CODE	Status of a MedEd funding plan.

If you need to add a value to a list of values, follow the procedures on modifying a list of values in *Applications Administration Guide*.

Administering MedEd Literature

You can associate a literature item with one or more MedEd sessions when it meets two conditions:

- The literature item is stored in the Siebel Life Sciences repository
- The Literature Type of the item is set to Sales Tool

For information about how to associate the literature item with a MedEd session, see [“To specify literature for a MedEd session”](#) on page 269.

To add a literature item to the application

- 1 From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2 In the Literature list, add a record and complete the necessary fields.
- 3 In the File Name field, click the select button.
- 4 In the Add Attachment dialog box, click Browse.
- 5 Navigate to the document you want to attach, click Open and then Add.
- 6 In the Literature Type field, select Sales Tool.

For more information about adding literature, see *Applications Administration Guide*.

Designating MedEd Event Speakers

Both administrators and end users may designate a contact as a speaker. In order to associate a speaker with a MedEd session, you must include the speaker as a Contact in the S_CONTACT table and select the Speaker flag.

For more information on working with contacts, see [Chapter 3, “Managing Contacts.”](#)

To designate a contact as a MedEd speaker

- 1 From the application-level menu, choose View > Site Map > Contacts screen.
- 2 From the Show drop-down list, select All Contacts.

NOTE: Depending on your responsibilities, you may also be able to use the My Contacts, My Team’s Contacts, or the All Contacts Across Organizations filters.

- 3 In the Contacts list, select the contact you want to designate as a speaker.

NOTE: When selecting the contact, do not click a hyperlink (underlined field). Doing so will take you to another view.

- 4** In the More Info form, click the show more button in the upper-right corner.
The More Info form expands and displays available fields.
- 5** Select the Speaker field.
The application lists the contact as a possible speaker for MedEd sessions.

End-User Procedures

The following end-user procedures are described in this section:

- [To create a MedEd plan](#)
- [To create a subplan on page 259](#)
- [To create a MedEd event on page 261](#)
- [To specify which MedEd plan to charge for event costs on page 263](#)
- [To create an activity plan for a MedEd event on page 264](#)
- [To record the cost of an activity on page 266](#)
- [To view aggregated activity costs for a MedEd plan on page 266](#)
- [To create a session for a MedEd event on page 267](#)
- [To specify literature for a MedEd session on page 269](#)
- [To specify materials for a MedEd session on page 270](#)
- [To invite a contact or an employee to a MedEd event on page 270](#)
- [To register an invitee for a MedEd session on page 271](#)
- [To generate correspondence to multiple invitees on page 272](#)
- [To automatically schedule a call to an invitee on page 272](#)

Setting Up a MedEd Plan

A MedEd plan is a database record that lets end users specify common funding for a group of medical education events that have a common objective. A subplan allocates a specific amount of the parent plan's funding to a given user in order to help accomplish the parent plan's objectives.

End users can compare aggregated actual costs of event activities with the MedEd plan budget at any time. For information on tracking costs, see [“Tracking Costs of MedEd Activities” on page 264](#).

To create a MedEd plan

- 1 Navigate to the MedEd screen.

2 From the Show drop-down list, select My MedEd Plans.

3 In the Plans list, add a record and complete the necessary fields.

Some of the fields in a Plans record are described in the following table.

Field	Comments
Assigned To	Person responsible for carrying out the plan.
Budget	Amount of money that the plan authorizes the responsible person to spend.
Parent Plan Name	Blank for master plans. For subplans, the application automatically provides the name of the associated parent plan.
Periods	Time period during which the plan is to be used. Administrators use the Marketing Administration screen to define periods.
Plan Name	The name of the MedEd plan for which team members can associate event costs with a given fund.
Products	Products to be promoted with the funds supplied under this plan.
Status	Status of the plan. Defaults to Active.

4 In the More Info form, enter any additional details.

The application automatically creates an unique alphanumeric value for the Plan ID.

Specify the details of the new MedEd Plan by creating subplans as described in the next procedure.

To create a subplan

1 Navigate to the MedEd screen.

2 From the Show drop-down list, select My MedEd Plans.

3 In the Plans list, drill down on the Name of the plan for which you want to specify a subplan.

The Plans form appears.

- 4 In the Sub-Plans list, add a record and complete the necessary fields.

Some of the fields in a Sub-Plans record are described in the following table.

Field	Comments
Assigned To	Person responsible for carrying out the subplan.
Budget	Amount of money that the subplan authorizes the responsible person to spend. If you wish to keep some funding in reserve, do not allocate the entire amount of the parent plan to the subplans.
Name	Name of the subplan.
Objective	One or more purposes to be accomplished by holding the MedEd events associated with the subplan.
Period	Time period during which the subplan is to be used. For more information on defining periods, see <i>Applications Administration Guide</i> .
Products	Products to be promoted with the funds supplied under this subplan.
Status	Status of the subplan. Defaults to Active.

The application automatically populates the subplan Plan Status and Assigned To fields.

- 5 Scroll down to the Events list.

In this view, the Events list is read-only.

When you create an event, you associate the event with a funding plan by assigning fractions of the event cost to specific end users. Once an event has been associated with an end user, that user designates which MedEd plan will be charged for his or her share of the total event costs. For more information, see the next section, “[Setting Up MedEd Events](#)” on page 260.

Setting Up MedEd Events

A MedEd event is a database record that describes an educational event attended by physicians or medical professionals. An event may consist of single or multiple-sessions and functions as a forum for exchanging information on a particular disease, illness, therapeutic class, or product.

The cost of a MedEd event can be allocated across multiple products and across team members. Users who have purchased and installed the optional ePharma Analytics product use these cost allocations as input when creating return on investment (ROI) analysis reports.

NOTE: Users who have purchased and installed the optional eMedEd module, can also display MedEd event information to selected professionals on their Physician Portal Web site. For more information, see *Siebel Life Sciences Portals Guide*.

To create a MedEd event

- 1** Navigate to the MedEd screen.
- 2** From the Show drop-down list, select My MedEd Events.
- 3** In the More Info form, add a record and complete the necessary fields.

Some of the fields in a My MedEd Events record are described in the following table.

Field	Comments
Accreditation	The organization that will be giving Continued Medical Education (CME) credits for attending the event.
Budget	The amount of money budgeted for the event.
CME Credit	Number of CME (Continued Medical Education) credits that can be earned at the event. For eMedEd, this field appears on the Physician Portal Web site.
Confirm Date	Date on which MedEd team members should send any confirmation reminder messages to registered invitees.
Confirmation	Indicates whether MedEd team members should send messages to registered invitees prior to the event reminding them to attend and asking them to reconfirm their attendance.
Created By	User name for the person who created the MedEd event.
End	Date and time that the event ends. Set the time fields before clicking a calendar day. For eMedEd, this field appears on the Physician Portal Web site.
Fee Required	Indicates whether the event requires an attendance fee.

Field	Comments
Location	City and address or venue where the event is to take place. For eMedEd, this field appears on the Physician Portal Web site.
MedEd ID	The application automatically creates this alphanumeric value when you create the event.
MedEd Team	A group of employees who will be responsible for planning, managing, and carrying out the MedEd event. Event costs may be allocated across team members as well as across product lines. For more information, see Step 4 on page 262 .
Name	The name of the event. If you are using MedEd with eMedEd, this field appears to selected contacts on your Physician Portal Web site.
Objective	The overall goal for the people attending the event. For eMedEd, this field appears on the Physician Portal Web site.
Products	One or more products targeted for discussion at the event. Event costs may be allocated across products. For more information, see Step 5 on page 263 .
Registration Fee	The amount of any fee required for attending the event.
Start	Date and time that the event starts. Set the time fields before clicking a calendar day. For eMedEd, this field appears on the Physician Portal Web site.
Status	Indicates whether the event is active, cancelled, completed, in progress, inactive, or planned. For eMedEd, this field appears on the Physician Portal Web site. Note: When the status is Completed, the event and its children records—such as Invitees, Sessions, Material, Activities, and Activity Plan—are locked. If the event status needs to be changed, the administrator can make changes in Data Administration > MedEd Event Details.
Type	The category of medical education event being offered. For eMedEd, this field appears on the Physician Portal Web site.

- 4 In the MedEd Team field, click the select button, and in the Event Team dialog box that appears, click New.

All available team members appear in the Event Team dialog box.

- a** Select the team members who will be responsible for managing and carrying out tasks associated with the event, and then click OK.
- b** In the Primary column, click the row adjacent to the team member who will be primarily responsible for the event.
- c** In the Cost Allocation field for each team member, enter the percentage of the event costs that will be charged to that team member.

For example, if an event team consists of three employees, one employee might be allocated 40% of the cost and the remaining two employees might be allocated 30% of the cost.

NOTE: The total of the values you enter for Cost Allocation across team members should equal 100%.

- d** Select your own record, specify a plan, and click Close.

Each MedEd Team member should log into Siebel Life Sciences and specify which MedEd plan will be charged for their portion of the event's costs.

- 5** In the Product field, click the select button, and in the Products dialog box that appears, click New.
 - a** Select the one or more products that will be discussed at the event.
 - b** In the Cost Allocation field for each product, enter the percentage of the event costs that will be charged to each product.

NOTE: The total of the values you enter for Cost Allocation across products should equal 100%.

To specify which MedEd plan to charge for event costs

- 1** Navigate to the MedEd screen.
- 2** From the Show drop-down list, select All MedEd Events or My MedEd Events.
- 3** In the MedEd Events list, select the event for which plans are being specified.
- 4** In the MedEd Team field, click the select button.

- 5 Select your record, specify a plan, and click Close.

Tracking Costs of MedEd Activities

In order to compare MedEd costs with the amount of funds budgeted in MedEd plans, event team members must:

- List task activities associated with MedEd events
- Enter the costs incurred for each activity

Siebel MedEd aggregates the line item activity costs against the MedEd plans specified by team members. For increased efficiency in planning event activities, users can create a MedEd activity template for each type of MedEd event that they commonly host.

An activity template allows common recurring tasks to be associated with a given event without having to enter each task manually. Such tasks might include renting a venue, hiring a caterer, obtaining equipment, printing literature, and arranging for other materials to be available for the event. For more information on creating activity templates, see [“Creating a MedEd Activity Template” on page 253](#).

The following procedure describes how to create an activity plan for an individual MedEd event, where the plan contains a combination of tasks derived from an activity template and tasks that are specific to the given event.

To create an activity plan for a MedEd event

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select My MedEd Events.
- 3 In the MedEd Events list, select an event.
- 4 Click the Activity Plans view tab.

- In the Activity Plans list, add a record and complete the necessary fields.

Some of the fields in an Activity Plans record are described in the following table.

Field	Comments
Description	Enter a description for this activity plan.
Lock Assignment	Determine whether the Assigned To field should be locked. If the activity is locked, Assignment Manager does not access it. If it is unlocked, Assignment Manager can reassign it.
Planned Start	Refers to the date that planning and preparation for an event starts, rather than the date that the MedEd event starts. Changing the value of Planned Start in an activity plan automatically changes the value of all Due dates for activities that are a part of that plan. In contrast, changing the value of an individual activity's Due date does not affect the values of Due dates for other activities or the Planned Start date for the activity plan.
Template	Select an activity template from the drop-down list. Individual activities from the selected template appear in the Activities list. For more information on creating activity templates, see <i>Applications Administration Guide</i> .

- If this event involves activities that are not included in the selected activity plan template, click the Activities subview tab.
- In the Activities list, add a record and complete the necessary fields.

Many activity fields are not applicable to MedEd events and can be left blank.

Some of the fields in an Activities record are described in the following table.

Field	Comments
Description	Enter a description for this activity.
Employees	User name of the person who is to perform the activity. Leave this field blank for the activity to be assigned to the active user.

- 8 Repeat [Step 7](#) until all activities have been specified.

To record the cost of an activity

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select My MedEd Events.
- 3 In the MedEd Events list, drill down on the Name hyperlink for the event for which you want to record the cost.
- 4 Click the Activities view tab.
- 5 In the Activities list, select the activity for which you want to supply cost information, and then scroll to the right until the Cost field appears.
- 6 Enter the cost of the activity in the Cost field.

To view aggregated activity costs for a MedEd plan

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select My MedEd Plans.
- 3 Drill down on the Name hyperlink for the plan for which you want to view aggregated costs.
- 4 In the Plans form, click Actual Cost in the upper-right corner.

The Actual Cost and Remaining Budget fields are updated in the form.

About Designating MedEd Event Speakers

Both administrators and end users may designate a contact as a speaker. In order to associate a speaker with a MedEd session, users must include the speaker as a Contact in the S_CONTACT table and select the Speaker flag. For more information, see [“Designating MedEd Event Speakers” on page 256](#).

You can review a list of all designated speakers.

To review all available speakers

- 1 Navigate to the MedEd screen.

- 2 From the Show drop-down list, select All Speakers.

The Speakers list shows all contacts that have been designated as speakers. This is a read-only list.

- 3 In the More Info form, click the show more button to see more details about the speakers.

Setting Up Sessions Within a MedEd Event

A MedEd event can be a single presentation, such as a lunch-and-learn where participants listen to a single speaker, or it can be composed of multiple individual sessions covering different subject areas. A session consists of a single class or meeting attended by one or more participants of a MedEd event. Because certain types of information are only associated with sessions, users must create at least one session for an event if they want to:

- Track speaker participation
- Associate one or more literature items with the event
- Associate materials or equipment items with the event
- Register participants for the event using their Physician Portal Web site and eMedEd software

MedEd is designed to allow participants to register for individual sessions, whether at one-session or at multiple session events.

NOTE: MedEd event participants can use the optional eMedEd module to register for MedEd sessions at your Physician Portal Web site. However, participants can only register at the session level. For reasons of configuration flexibility, event-level registration must be entered manually in the Invitee Status field of the Invitee view tab.

The following procedure describes how to create a session for a MedEd event. Repeat this procedure for each required session.

To create a session for a MedEd event

- 1 Navigate to the MedEd screen.

- 2 From the Show drop-down list, select My MedEd Events.
- 3 In the MedEd Events list, select an event.
- 4 Click the Sessions view tab.
- 5 In the Sessions list, add a record and complete the necessary fields.

Some of the fields in a Sessions record are described in the following table.

Field	Comments
CME Credit	Number of Continued Medical Education Credits (CME) that can be earned by attending the session. This field is not typically displayed on the Physician Portal Web site, but can be configured to do so as an implementation detail.
End Date	Defaults to end date and time for the event that includes the session. However, for multiple session events, each session's end date and time can differ from the end date and time of the event. Typically, the time is the most important part of this setting. For eMedEd, this field appears on the Physician Portal Web site.
Location	Describes where the session will be held. Typically used to indicate a room name or number within a hotel, conference center, or other venue.
Max Attendees	Indicates the maximum number of attendees for the session.
Products	One or more products targeted for discussion during the session.
Session Name	Name of the session within a multiple-session event. For single-session events, simply repeat the event name. For eMedEd, this field appears on the Physician Portal Web site.
Session Objective	Overall goal for the participants attending the session. For eMedEd, this field appears on the Physician Portal Web site, but the field name is changed from Objective to Description.
Speaker First Name	The application automatically supplies this value if a Speaker Last Name is selected. For eMedEd, the value of this field combined with the value of the Speaker First Name and appears on the Physician Portal Web site.
Speaker Last Name	Select the last name of the person giving a presentation during the session. For more information on managing contacts, see "Adding a Contact" on page 58. For eMedEd, the value of this field combined with the value of the Speaker First Name and appears on the Physician Portal Web site.

Field	Comments
Start Date	Defaults to start date and time for the event that includes the session. However, for multiple-session events, each session's end date and time can differ from the end date and time of the event. Typically, the time is the most important part of this setting. For eMedEd, this field appears on the Physician Portal Web site.
Status	Indicates whether the session is active, canceled, completed, in progress, or inactive. For eMedEd, this field appears on the Physician Portal Web site. Note: When the status is Completed, the event and its children records—such as Invitees, Sessions, Material, Activities, and Activity Plan—are locked.

To provide literature to event attendees, end users can associate literature with each session of an event. The MedEd administrator can also create an item in an activity template directing an event team member to make sure that there is adequate stock of the required literature items available. For more information about adding a literature item to the database, see [“Administering MedEd Literature” on page 255](#).

To specify literature for a MedEd session

- 1** Navigate to the MedEd screen.
- 2** From the Show drop-down list, select My MedEd Events.
- 3** In the MedEd Events list, select an event.
- 4** Click the Sessions view tab.
- 5** Drill down on the Session Name hyperlink for the session for which you want to specify literature.
- 6** Scroll down to the Literature list, and add a record.

The Add Literature dialog box appears.
- 7** In the Add Literature dialog box, select one or more literature listings, and then click OK.

The selected literature items appear in the Literature list.

In addition to literature, each session can require certain equipment and other materials, such as flip charts, markers, projectors, and screens. You may wish to create an item in an activity template directing an event team member to make sure that the required materials will be available.

To specify materials for a MedEd session

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select My MedEd Events.
- 3 In the MedEd Events list, select an event.
- 4 Click the Sessions view tab.
- 5 Drill down on the Session Name hyperlink for the session for which you want to specify materials.
- 6 Scroll down to the Materials list and add a record, completing the necessary fields.

The new items appear in the Materials list.

For more information about adding a materials item to the drop-down list of available items, see [“MedEd Lists of Values” on page 254](#). Drop-down values are normally added and maintained by an administrator.

Inviting and Registering Prospective MedEd Attendees

After an end user has scheduled a MedEd event and decided what sessions will be offered, the next step is to invite participants.

End users who have purchased and set up the optional eMedEd module can also use this procedure to let each invited contact view information about an event on their Physician Portal Web site. For those users who are not using eMedEd, the Invitee information indicates that the call center agents or sales representatives need to convey the invitation to the invitee.

To invite a contact or an employee to a MedEd event

- 1 Navigate to the MedEd screen.
- 2 In the MedEd Events list, select an event.

- 3 Click the Invitees view tab.
- 4 In the Invitees list, add a record.
- 5 In the Invitees dialog box, select individuals to be invited to the MedEd event, and click OK.

NOTE: The Pick Invitees dialog box displays those employees and contacts that are on the same team as the user.

- 6 In the Role field of the Invitees list, select the value that best describes each individual's role at the session.
- 7 In the Comments field, enter any additional information.

As soon as you leave the current record, information about the selected session becomes available to the designated invitee at the Physician Portal Web site.

NOTE: When the event status is Completed, the event and its children records—such as Invitees, Sessions, Material, Activities, and Activity Plan—are locked and become read-only lists.

The following procedure describes how to register a contact or employee for a MedEd session by using the dedicated client software. This procedure can be used whether or not you are using the optional eMedEd module for the Physician Portal Web site.

To register an invitee for a MedEd session

- 1 Invite the contact or employee to the MedEd event as described in [“To invite a contact or an employee to a MedEd event” on page 270](#).
- 2 In the Invitees list, select the invitee to be registered by clicking any field *except* Last Name.
- 3 Scroll down to the Sessions list and add a record.
- 4 In the Sessions field, click the select button.
- 5 In the Pick Session dialog box that appears, select the sessions the invitee will be attending and click OK.
- 6 In the Registration Status field, change the status to Confirmed.

Repeat [Step 3](#) through [Step 6](#) for each additional session the invitee will attend.

Generating Correspondence for MedEd Event Invitees

End users can send electronic correspondence, such as an agenda, brochures, or a list of hotels, to all event invitees.

To generate correspondence to multiple invitees

- 1** Navigate to the MedEd Screen.
- 2** From the Show drop-down list, select My MedEd Events.
- 3** In the MedEd Events list, select an event.
- 4** Click the Invitees view tab.
- 5** Perform one of the following:
 - Query for the invitees to whom you wish to send correspondence.
 - From the application-level menu, select Edit > Select All to select all the people invited to the MedEd event.
- 6** From the application-level menu, select File > New > Correspondence.

The Correspondence Recipients list shows all the invitees you selected in [Step 5](#).
- 7** In the Correspondence List, select a correspondence template and complete the necessary fields.

Scheduling Calls to an Invitee

End users can schedule calls to invitees. These calls appear in the Contacts screen.

To automatically schedule a call to an invitee

- 1** Navigate to the MedEd screen.
- 2** From the Show drop-down list, select My MedEd Events.
- 3** In the MedEd Events list, select an event.
- 4** Click the Invitees view tab.

5 Query for the invitees with whom you wish to schedule a call.

6 Click the Schedule button.

The Auto Schedule dialog box appears.

7 In the Auto Schedule dialog box, review the displayed values, make any needed changes, and click OK.

The auto-scheduling function does not check for scheduling conflicts. Therefore, users need to verify that automatically scheduled calls do not conflict with other activities in their calendar.

Objectives 12

An *objective* is usually a sales or marketing goal, assigned to a particular individual or team and targeted at a particular set of accounts or contacts. It includes one or more recommended activities to be performed by sales representatives as they visit the target contacts and accounts to which the objective is applied.

Ideally, objectives should be implemented at the beginning of a planning cycle to use them effectively.

Objectives can have child objectives associated with them. For example, an overall goal of increasing prescriptions of a particular product might have associated sub-goals of increased calls to certain contacts or accounts and improved education on product issues. If necessary, you can enter detailed information about the objective in a Summary text.

Structuring Objectives

Managers typically define objectives for their teams, but individual users can also define personal objectives for themselves or create child objectives of larger objectives that have been defined for them. If there is general information about the objective that all team members need to know, include it in the Summary text. If there are electronic versions of documents or graphics that are related to the objective, add them as attachments.

The process of associating accounts and contacts with objectives is an excellent candidate for using target lists. After creating target lists of contacts and accounts at whom you will direct your sales efforts, you can apply those lists in the Objective Targets view.

Business Scenario

This scenario is an example workflow performed by a pharmaceutical district manager and sales representatives to create and fulfill sales objectives. Your company may follow a different workflow according to its business needs.

Your company, a large pharmaceutical manufacturer, has received approval for a new indication for one of your products. The district manager is responsible for making sure that the sales representatives reporting to her take the actions necessary to have a successful launch of this product for the new indication.

The district manager begins by creating an objective. Next, she adds three recommended activities that she wants each member of her sales force to carry out in order to meet this objective: to attend a training program, to attend a team meeting to outline tactical aspects of promoting the new indication, and to conduct contact calls. In order to communicate the importance of these activities to her sales force, she assigns the priority “1-ASAP” to all three recommended activities. She also adds a product insert to the objective as a literature item. Her sales representatives can use this product insert to gain valuable information about the new indication prior to visiting contacts. Finally, she adds every targeted contact in each territory to the objective, adds each sales representative as an objective team member.

As the sales representatives check their calendars, they will see that the district manager has scheduled a series of calls for them to complete. As they prepare for each of these calls, they can review the objective and the recommended activities she has created and the product insert she added. Later, as the new indication launch is in progress and the sales representatives are performing sample drops, the district manager or sales representatives can review the objective and note whether its related recommended activities have been completed.

Objectives Workflow

See [Figure 8](#) for an objectives workflow diagram.

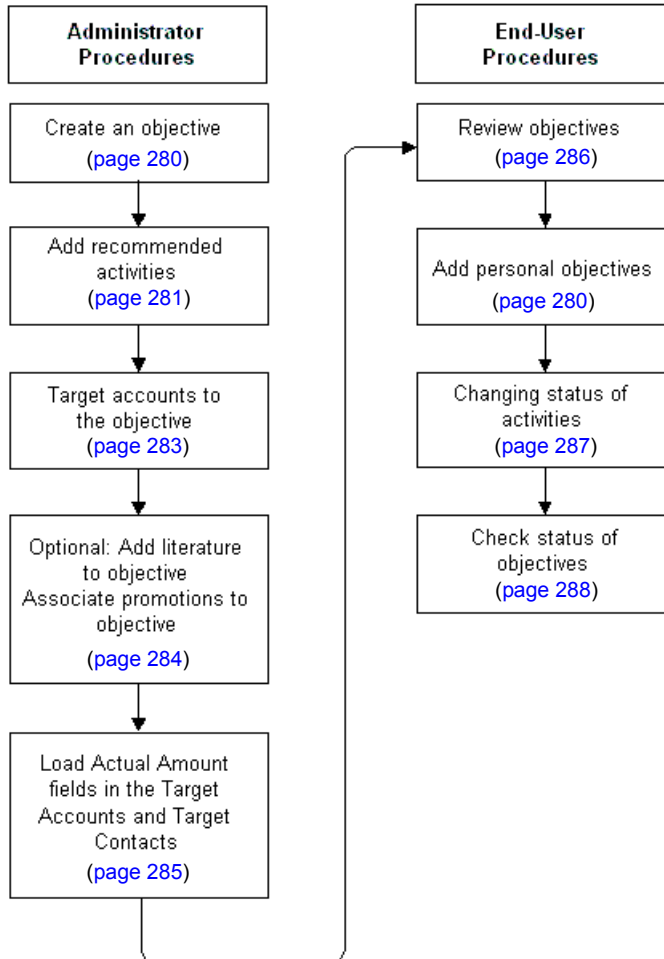


Figure 8. Objectives Workflow

Administrator Setup Procedures

These tasks are typically performed by District Managers or Marketing Administrators, although some companies choose to allow sales representative to create their own objectives. To create an objective and use it to schedule calls, complete the procedures described in the following sections.

NOTE: As in all Siebel products, the availability of certain views and functionality can be limited according to each user's responsibilities; therefore, the views mentioned here may vary from those on your screen. Generally, an administrator has responsibility for updating user privileges.

Table 14 describes the functions of the various views in the Objectives screen. Your responsibilities determine which views are available to you.

Table 14. Views Available from the Objectives Screen

View	Functions
My Objectives	Allows you to view objectives assigned to you and add new ones.
My Team's Objectives	Allows managers to view objectives assigned to their teams and add new ones. A manager's own objectives also appear in this view.
Targets	Allows you to specify and view accounts and contacts targeted for an objective. Also allows you to track progress toward your defined goals.
Target Accounts	Displays target accounts and the contacts for them, and can display actual results charted against a quantified goal (same view as Charts).
Contact Status	Displays a list of contacts and the recommended activities for each contact, with actual amount.
Attachments	Allows you to add and display electronic file attachments for an objective.
Charts	Displays actual results charted against a quantified goal. A variety of chart formats can be selected. The values used to measure progress must be loaded using Enterprise Integration Manager (EIM). Generally, the Siebel administrator performs this task.

Creating an Objective

You must complete this task before performing the remaining tasks in this chapter. If you need an objective to recur, see [“Creating Recurring Objectives” on page 281](#).

To create an objective

- 1 From the application-level menu, choose View > Site Map > Objectives screen.
- 2 In the Objectives list, add a record, and complete the necessary fields.

Some of the fields in an Objectives record are described in the following table.

Field	Comments
Objective	Required.
Parent Objective	<p>If this objective is a subgoal of another objective, select the parent objective.</p> <p>The parent objective defines some of the criteria for all of its child objectives. For instance, child objectives are constrained to the products associated with the parent objective, if any.</p> <p>You can create parent objectives without completing the Parent Objective field. You <i>must</i> complete the Parent Objective field when creating child objectives.</p> <p>Parent-child relationships between objectives can be viewed in the Objectives Explorer view. Note that child objectives are not constrained by the organization or team definitions of the parent objectives.</p>
Type	The type of objective being created; for example, a promotion or a marketing type of objective. Selecting the type of objective does not drive any other functionality within the product.
Description	A few words which describe the purpose of the objective.
Period	The period of time during which an objective must be completed.
End Date	The ending date of an objective. It must fall within the objective's time period.
Organization	The organization will constrain the target accounts that will be available to associate with the objective.

Field	Comments
Team	Multiple people can be assigned to the objective's team.
Actual	This data must be imported by the Siebel administrator using EIM. You cannot manually edit this field.
Last Actual Update	This date must be added by the Siebel administrator using Siebel EIM, after the Actual data has been updated. You cannot manually edit this field.

Creating Recurring Objectives

At some time you may wish to create recurring objectives. You can:

- Change the period of an existing objective
- Copy an existing objective and apply a new period to it
- Use Workflow to schedule monthly calls. For more information, please see *Siebel Business Process Designer Administration Guide*.

NOTE: Deleting an objective completely removes the objective from the system. If you are unsure about whether the objective is still active (and therefore should not be deleted), you can remove yourself from the objective's team instead of deleting the record.

Adding Recommended Activities to an Objective

You can add one or more recommended activities to an objective. Recommended activities:

- Are associated with every target account added to the objective
- Are not assigned to individuals, since they will be used when planning calls to all of the targeted accounts
- Can optionally be associated with individual products, if certain activities apply to specific products

To add recommended activities to an objective

- 1 From the application-level menu, choose View > Site Map > Objectives screen.
- 2 In the Objectives list, select the objective to which you want to add an activity.
- 3 Click the Contact Status view tab, add a record to the Activities list, and complete the necessary fields.

Some of the fields in an Activities record are described in the following table.

Fields	Comments
Type	The type of activity to be performed; for example, an assessment or presentation.
Assessment Template	The name of the assessment template assigned to the recommended activity. If the recommended activity requires an assessment to be carried out, the relevant assessment template can be associated with the recommended activity. For information on assessment templates, see <i>Applications Administration Guide</i> .
Planned Completion	The suggested date the recommended activity ends; the default is the objective period end date. If you choose to edit it, the date must come after the planned start date for the recommended activity, and must fall within the period assigned to the parent objective.
Planned Start	The suggested date the recommended activity begins; the default is the objective period start date. If you choose to edit it, the date must fall within the period assigned to the parent objective.
Products	Each activity can have one or more products associated with it. The choice of products is restricted to products that are already associated with the objective. To add products to an objective, see “Creating an Objective” on page 280 .

NOTE: Recommended activities can only be performed on products that have been added to an objective.

Targeting Accounts to an Objective

You can apply objectives to one or more target accounts. The target accounts that will be available are those that belong to the organization of which the user is an account team member.

In the Objective Targets view, add and view accounts and contacts targeted for an objective. You can display charts of progress toward a quantified goal for target accounts or target contacts. A variety of chart formats can be selected from the drop-down menu at the right of the toggle button in the chart view.

NOTE: For information on creating and applying target lists, see [Appendix A, “Information for Siebel Application Developers.”](#)

To specify target accounts or contacts for an objective

- 1** From the application-level menu, choose View > Site Map > Objectives screen.
- 2** Select the appropriate objective in the Objectives list, and click the Targets view tab.
- 3** Select either the Target Accounts list or the Target Contacts list and click New.
- 4** Select the appropriate accounts or contacts.

You can select multiple records in the Add Accounts and Add contacts dialog boxes. You can also apply target lists in these dialog boxes, as described in [“To apply one or more target lists” on page 86](#).

- 5** Click Add.

The accounts or contacts you selected are added to the list.

NOTE: Data for the Actual Amount fields in the Target Accounts and Target Contacts lists must be imported by the Siebel administrator. You cannot manually edit these fields. For more information, see [Chapter 19, “Importing Data.”](#)

Adding Attachments to an Objective

An attachment can be any file containing information relevant to the objective. You can use the Objective Attachments view to add, delete, and view attachments associated with an objective. You can add supporting literature, such as marketing and sales documents, to an objective. Any member of the team assigned to the objective can add or delete attachments.

To add an attachment to an objective

- 1** From the application-level menu, choose View > Site Map > Objectives screen.
- 2** Select the appropriate objective in the Objectives list and click the Attachments view tab.
- 3** Click New.
- 4** In the Name field, specify the filename or URL.
- 5** Check the Auto Update flag if you want to have the file automatically updated during synchronization.

This applies only to local files. If a file is not local, it cannot be updated during synchronization.

- 6** Click Save.

NOTE: In order for users to view a literature item, they need to have software capable of opening the literature item file installed on their computers. For example, they must have Adobe Acrobat Reader in order to view a .pdf file.

Changing the Dates for Objectives

During the planning stages for an objective, you can change its start date and end date. Date changes that you make to an objective can be applied to its recommended activities by changing the dates for each activity manually.

To change the dates for an objective

- 1** From the application-level menu, choose View > Site Map > Objectives screen.
- 2** Select the Objective for which you want to change the start date or end date.
- 3** Select a new start date or end date for the objective by using one of the following methods.
 - Click the down arrow in the Start Date or End Date field and select a new start date or end date for the objective.
 - Click the down arrow in the Period field and select a new time period for the objective. The start date and end date are automatically set to the first and last dates in the period.

The Start and End Dates must fall within the date period of the parent objective.

Loading Actual Amount Fields Using EIM

You must load data into the Actual Amounts fields of Target Accounts and Target Contacts using Siebel Enterprise Integration Manager (EIM). Once loaded, this data becomes read-only. Refer to *Siebel Enterprise Integration Manager Administration Guide*.

End-User Procedures

Sales representatives will use the Objectives screen to create and review objectives, recommended activities, target accounts, and literature that apply to the contacts and accounts they call on.

For more information on creating an objective, see [“To create an objective” on page 280](#).

Reviewing Objectives

When end users navigate to the Objectives screen, the default filter used on the Objectives list is My Objectives. The availability of the other view, My Team’s Objectives, can be limited by the user’s responsibilities.

The remaining view tabs and fields visible to the end users in the Objectives screen are identical to those available to the administrator.

To review objectives

- 1** Navigate to the Objectives screen or to Objectives > Explorer view.
- 2** The default filter used on the Objectives view, and the additional filters available, depends on the end user’s responsibilities. The filters available from the Show drop-down list are:
 - All Objectives Across Organization
 - All Objectives
 - My Objectives
 - My Team’s Objectives
- 3** From the Show drop-down list, select the appropriate filter:
 - My Objectives: Objectives for which the user is assigned to the team
 - My Team’s Objectives: All Objectives within a manager’s team, including their own
 - All Objectives: If available, the list of Objectives for the default organization, such as department, business unit, or sales force

- All Objectives Across Organization: If available, the most comprehensive list of Objectives
- 4 Use the view tabs to review recommended activities, target accounts, and other information about the objectives.

To request literature items when using a local database

- 1 If you are using a local database and the document you want to view is unavailable, click the Request field in the Literature applet.

A dialog box appears and prompts, “Would you like to request this file from the server? It will be downloaded the next time you synchronize.”

- 2 Click Yes.

The next time you synchronize with the server, the requested file will be downloaded and available for viewing.

Changing the Status of Activities

After performing the recommended activities, you can change the status of objectives and the associated activities.

To change the status of activities associated with an objective

- 1 Navigate to the Objectives screen.
- 2 In the Objectives list, select an objective.
- 3 Click the Account Status view tab.
- 4 In the Accounts list, select an account.
- 5 In the Recommended Activities list, change the Status field of the activity.

Administrator and End-User Maintenance Procedures

During the campaign, managers and sales representatives check on the status of the objectives and associated activities.

Checking the Status of Objectives

You can use the Account Status view or a graphical chart to check objectives and the status of their recommended activities.

To check the status of an objective

- 1** Navigate to the Objectives screen.
- 2** Select the objective whose status you want to review.
- 3** Click the Account Status view tab.
- 4** Select the account whose status you want to review.

The recommended activities associated with the account are displayed in the Recommended Activities subview. You can check the status of each recommended activity.

To check the status of an objective using charts

- 1** Navigate to the Objectives screen.
- 2** Select the objective whose status you want to review.
- 3** Click the Charts view tab.

Choose from the charts available using the Charts view Show drop-down list.

Setting Up and Carrying Out a Clinical Trial **13**

This chapter describes the main steps involved in carrying out a clinical trial using Siebel eClinical. Following the procedures given in this chapter you will be able to:

- Create a clinical program and clinical protocols
- Set up document tracking at the protocol, region, and site levels, and for accounts and contacts
- Set up and revise subject visit templates for a protocol
- Enter data on accounts, sites, and contacts
- Screen and enroll subjects
- View charts showing subject status and enrollment rates
- Review payments made to the protocol

Figure 9 illustrates the important hierarchical relationship of programs, protocols, regions, and sites. In this example, the Bristol General Hospital in the USA region is participating in the AMXN 98447 protocol, which is being carried out as part of the Anemia program.



Figure 9. Siebel eClinical Hierarchical Relationships

Business Scenario

This scenario is an example workflow performed by the director of clinical trials, clinical study manager, and the clinical research associates (CRAs). Your company may follow a different workflow according to its business requirements.

In this scenario, the clinical director and the study manager, working for a clinical research organization, or pharmaceutical, biotech, or medical device company, have administrator responsibilities in Siebel eClinical to:

- Set up a new treatment study program.
- Create one or more protocols designed to assess the safety and efficacy of certain compounds in the treatment of the disease.
- Set up the geographic regions where the protocols are to be carried out.
- Compile a list of documents that are critical to the study and implement tracking at the protocol, region, and site levels, and for accounts and contacts.
- Create a subject visit template to facilitate consistent application of the protocol across sites and subjects. This template is used to set up subject visit schedules and activities according to the guidelines laid out in the protocol.

Once the program, protocol, and subject visit templates have been set up, the CRAs who are the end users of the Siebel eClinical product do the following:

- Enter data about the:
 - Sites where the protocols are carried out.
 - Assign members to the teams at the site, region, and protocol levels.
 - Accounts, institutions such as hospitals and clinics where the studies are conducted.
 - Contacts, site personnel such as investigators, site coordinators, and nurse practitioners who carry out the protocols.
 - Subjects recruited for the clinical trial.
- Screen and enroll subjects and, if necessary, rescreen the subjects.

- Use the subject visit template to set up detailed schedules for the subjects' visits to the sites.
- Track required documents at the protocol, region, or site level, or for accounts or contacts.

NOTE: The tasks of entering subject data and set up screening and enrollment visit schedules for subjects may also be performed by the site personnel using Site Portal Web site. For more information about Siebel Site Portal, see *Siebel Life Sciences Portals Guide*.

At various times after subjects have been enrolled in the trial, the clinical director, study manager, or CRAs can use the charting features of Siebel eClinical to review the progress of the trial. Two informative metrics are the subject status and enrollment rate. These are plotted for an individual site, for a region, and for the protocol.

Example Workflow Managing Clinical Trials

This section details sample tasks often performed by administrators and end-users when managing clinical trials. Your company may follow a different workflow according to its business requirements.

In the following examples, tasks are carried out in the order presented. For example, a protocol must exist before its subject visit template can be created.

Administrator Procedures

The following list shows tasks administrators typically perform to manage a clinical trial. These tasks are typically performed in the following order:

- 1 Create a clinical program.** For more information, see [“Creating a Clinical Program” on page 295](#).
- 2 Create protocols for the program.** For more information, see [“Adding a Protocol” on page 297](#).
- 3 Optional: Set up regions for the protocol.** For more information, see [“Setting Up Regions” on page 299](#).
- 4 Set up subject visit templates that follow the protocol guidelines.** For more information, see [“Defining a Subject Visit Template” on page 300](#).
- 5 Assemble electronic documentation that is relevant to the protocol.** Documents can be attached and tracked at the protocol, region, and site levels, or for accounts or contacts. For more information, see [“Creating Documentation Tracking Activities” on page 305](#).
- 6 Revise protocol or create a new version of the visit template.** [“Revising Protocols” on page 306](#).

End-User Procedures

The following list shows tasks end users typically perform when managing a clinical trial. The procedures are performed by the CRA at the site level and are typically performed in the following order:

- 1 Optional: Enter data on accounts and contacts.** For more information, see [“Adding an Account and Contacts” on page 307.](#)
- 2 Create sites.** For more information, see [“Adding a Site” on page 309.](#)
- 3 Review electronic documents for tracking.** For more information, see [“Reviewing Documentation for Tracking” on page 312.](#)
- 4 Enter, screen, rescreen, enroll subjects.** For more information, see [“Adding a Subject and Setting Up Visits and Visit Activities” on page 312.](#)
- 5 Chart subject status and enrollment rates.** For more information, see [“Monitoring Subject Status and Enrollment Rates” on page 318.](#)
- 6 Update version of visit template used at site.** In response to protocol revisions, the CRA modifies the site visit template and applies the updated visit template version to enrolled subjects. For more information, see [“Updating a Protocol Version at a Site” on page 316.](#)
- 7 Review payments made to the protocol.** For more information, see [“Reviewing Protocol Payments” on page 318.](#)

Administrator Procedures

This section provides instructions for the following tasks:

- [To add a new clinical program](#)
- [To add a new protocol on page 297](#)
- [To add regions to a protocol on page 299](#)
- [To add a subject visit template on page 302](#)
- [To create documentation tracking activities on page 305](#)
- [To update and add existing documentation for tracking on page 305](#)
- [To create a new version of the subject visit template on page 306](#)

Creating a Clinical Program

The clinical program is the highest-level initiative in Siebel eClinical. Protocols, region, sites, and subjects must be associated with a program.

Multiple regulatory applications can be associated with a program.

To add a new clinical program

- 1** From the application-level menu, choose View > Site Map > Clinical Administration > Clinical Programs.

- 2 In the Clinical Programs list, add a record, and complete the necessary fields.

NOTE: Before you can create an application, the associated product must be correctly defined as type Compound. For more information about defining products, see [Chapter 18, “Managing Products.”](#)

Some of the fields in a Clinical Programs record are described in the following table.

Field	Comments
Application	<p>A multi-value field containing details of the application.</p> <p>Filed. Whether the application has been filed with the specified regulatory agency.</p> <p>Indication. The clinical indication for the application. The choices in this drop-down list are configured by using the CLNCL_PROG_INDICATION type in the List of Values.</p> <p>Number. The number assigned to the application when submitted to the regulatory agency. More than one application number may be assigned to a program.</p> <p>Product. This field must be completed before a protocol can be created for the program.</p> <p>Sub-Type. Who filed the application. For example, a company or an investigator. The choices in this drop-down list are configured by using the CLNCL_PROG_APPL_SUBTYPE type in the List of Values.</p> <p>Type. The type of application, such as CTN, IND, or CTX. The choices in this drop-down list are configured by using the CLNCL_PROG_APPL_TYPE type in the List of Values.</p>
Mechanism	<p>Partners associated with the clinical program. The choices in this drop-down list are configured by using the CLNCL_PROG_MECHANISM type in the List of Values.</p>
Program	<p>The name of the clinical program.</p>

- 3 Optional: Click the Attachments view tab, and attach files associated with the clinical program.

Adding a Protocol

Multiple protocols and multiple versions of a protocol can be associated with a program.

To add a new protocol

- 1** From the application-level menu, choose View > Site Map > Clinical Administration > Protocols.
- 2** In the Protocols list, add a record, and complete the necessary fields. (To access more fields, click the show more button in the form.)

Some of the fields in the Protocol record are described in the following table.

Field	Comments
# Planned Sites	Number of sites planned for the protocol.
# Planned Subjects	Number of subjects planned for the protocol.
Abbreviated Title	Short descriptive title for the protocol.
Central Lab	The name of the laboratory associated with the study. This is entered through the Accounts screen.
Currency Code	The currency that is used to display the payments, costs, and budgets in the Protocols screen. The default value is USD (United States dollars).
Design	Information about the type of study.
Exchange Date	The date that determines the exchange rate of the currency used. By default, the exchange date for the protocol is the date the protocol is created. This date may be changed in response to changes in currency rates. However, changes made to the exchange date at the protocol level take effect only when the exchange date also changes at the system level. For more information, see <i>Applications Administration Guide</i> .
Lab Contact Last Name	Contact person associated with the central lab.
Paid to Date	The sum of the payments associated with the protocol.

Field	Comments
Phase	Phase of clinical trial such as Phase II, or III. The choices in this drop-down list are configured by using the LS_PTCL_PHASE type in the List of Values.
# Planned Sites	Number of sites planned for the region.
# Planned Subjects	Number of subjects planned for the region.
Product	Only products that have been associated with the clinical program, through the Application field in the Clinical Programs view, can be selected from the Clinical Product and Indication dialog box. See “To add a new clinical program” on page 295 .
Program	Name of the clinical trial program.
Protocol #	Identifying number assigned to the protocol.
Regions Required	Flag to indicate the sites for this protocol must belong to a region. For information on regions, see “Setting Up Regions.” When this flag is selected, you cannot create sites directly under protocols. You must create regions first and then create sites that are associated with regions.
Status	Protocol status such as planned, in progress, completed. The choices in this drop-down list are configured by using the LS_PTCL_STAT_CD type in the List of Values.
Team	Enter the names of those who need access to the protocol, the study manager and others who monitor the clinical trial.
Title	Descriptive title for the protocol.
Type	Purpose of the protocol. The choices in this drop-down list are configured by using the LS_PTCL_TYPE_CD type in the List of Values.

- 3 Optional: Add files associated with the clinical protocol as attachments.

Setting Up Regions

Clinical trials are often global, taking place in multiple countries. It is useful to track and view study data by country and region. The region level in Siebel eClinical allows you to do this.

Regions are optional for protocols. However, if you choose to use regions, by flagging the Regions Required field in the protocol record, then each site associated with the protocol must belong to a region.

One of the advantages of using regions is that it provides another way of grouping sites and subjects. For example, you can chart subject enrollment by region in addition to by protocol and by site.

NOTE: You cannot create regions for a protocol unless the Regions Required flag has been selected for the protocol. See [“Regions Required” on page 298](#).

To add regions to a protocol

- 1** From the application-level menu, choose View > Site Map > Clinical Administration > Regions.
- 2** In the Regions list, add a record, and complete the necessary fields.

Some of the fields in a Region record are described in the following table.

Field	Comments
Currency Code	The currency that is used to display the payments, costs, and budgets in the Regions screen. The default value is USD (United States dollars).
Exchange Date	The date that determines the exchange rate of the currency used. By default, the exchange date for the region is the date the region is created. This date may be changed in response to changes in currency rates. However, changes made to the exchange date at the region level take effect only when the exchange date also changes at the system level. For more information, see <i>Applications Administration Guide</i> .

Field	Comments
Protocol #	Only protocols where regions are required are listed in the Pick Protocol dialog box.
# Planned Sites	Number of sites planned for the region.
# Planned Subjects	Number of subjects planned for the region.
Name	A name for the region. This is automatically filled in with the protocol number and the region name.
Region	Geographic region to which the site belongs. The choices in this drop-down list are configured by using the CLINICAL_REGION type in the List of Values.
Team	Team members associated with the protocol to which the region belongs. See Step 3 for information on entering.

- 3 To add team members to the region, click the select button in the Team field, select a name in the Team picklist and click Position Rollup.

The team member is automatically added to the protocol to which the region belongs.

- 4 Create a region record for each country or geographical area where there are or will be sites participating in the protocol.

NOTE: It is important to specify the Currency Code for each region if multiple currencies will be used for the trial.

Defining a Subject Visit Template

Subject visit templates allow you to set up a template schedule based on the protocol. The template is then used to generate screening, rescreening, and enrollment schedules for each subject, according to the subject's screening, rescreening, and enrollment dates.

About Subject Visit Templates

Figure 10 and Figure 11 illustrate the relationship between the subject visit template and the visit schedule created for a given subject.

For example, if the subject visit template shown in Figure 10 is applied to a subject with a screen date of 11/20/2001, a rescreen date of 11/22/2001, and an enrollment date of 11/26/2001, the resulting visit schedule is as shown in Figure 11.

Sequence	Visit Type	Name	Lead	Lead Units	Min	Max	Min/Max Units
1	Screening	Screening Visit	0 weeks	0	0	1	days
2	Re-screening	Re-Screening Visit	0 weeks	0	0	1	days
3	Enrollment	On Study Visit 1	1 weeks	1	1	1	days
4	Enrollment	On Study Visit 2	2 weeks	2	1	1	days
5	Enrollment	On Study Visit 3	3 weeks	3	1	1	days

Figure 10. Visits List

Type	Name	Due	Version	Planned	Assigned To	Lock Assignment	Completed	Completed Date
Screening	Screening Visit	11/20/2001 9:00:00	Version 1	11/20/2001	LSMITH	✓		
Re-screening	Re-Screening Visit	11/22/2001 9:00:00	Version 1	11/22/2001	LSMITH	✓		
Enrollment	On Study Visit 1	12/03/2001 9:00:00	Version 1	12/03/2001	LSMITH	✓		
Enrollment	On Study Visit 2	12/10/2001 9:00:00	Version 1	12/10/2001	LSMITH	✓		
Enrollment	On Study Visit 3	12/17/2001 9:00:00	Version 1	12/17/2001	LSMITH	✓		

Figure 11. Subject Form and Visits List in the Visit Plans View

The first screening visit takes place on the screen date because the lead time for this visit is 0. But this visit can be rescheduled to 11/21/2002 because the allowed variation for this visit is two days after the lead date (Max = 2 days). If you enter a date before the 11/20/2002 or after the 11/21/2002, an alert message appears, warning you that the entered date is outside the allowed range.

Similarly, the first enrollment visit takes place on 12/03/2001 because the lead time for this visit is 1 week after the enrollment date of 11/26/2001.

If the protocol is amended, you will need to create new versions of the subject visit template to reflect the modifications made to the protocol. See [“Revising Protocols” on page 306](#).

Creating a Subject Visit Template

The following procedure describes how to add a subject visit template.

To add a subject visit template

- 1 From the application-level menu, choose View > Site Map > Clinical Administration > Visit Templates.
- 2 In the Subject Visit Templates list, add a record, and complete the necessary fields.

Some of the fields in the Subject Visit Template record are described in the following table.

Field	Comments
Name	Name of the new subject visit template.
Protocol #	Protocol to which this subject visit template is to be associated. Select from list of existing protocols in the Pick Protocol dialog box.
Protocol Title	Tied to the Protocol # field.

- 3 For the new subject visit template, in the Template Versions list, create a new template version record.

- 4 For the new template version record, in the Visits list, create a visit record for each visit (screening, rescreening, and enrollment) that a subject is to make to the site.

Some of the fields in a Visits record are described in the following table.

Field	Comments
Lead	<ul style="list-style-type: none"> ■ For Screening visits, this is the time from the screen date. For example, in Figure 10 on page 301 the Lead value for the screening visit is 0. ■ For Rescreening visits, this is the time from the rescreen date. ■ For Enrollment visits, this is the time from the enrollment date. The Lead value for an enrollment visit taking place 1 week after enrollment would be 1, assuming the Lead Unit is weeks.
Lead Units	Units for lead time.
Max	<p>The time after the lead time that the visit may take place.</p> <p>For example, if Max = 2 and Min/Max Units = days, the visit may take place up to two days after the scheduled visit.</p> <p>Do not leave this field blank.</p>
Min	<p>The time before the lead time that the visit may take place.</p> <p>For example, if Min = 1 and Min/Max Units = days, the visit may take place one day before the scheduled date.</p> <p>Do not leave this field empty.</p>
Min/Max Units	<p>Units for the Min and Max values.</p> <p>Do not leave this field empty.</p>
Name	Name of the visit; for example, screening or baseline.

Field	Comments
Sequence	Sequence number of the visits. Typically, the first visit that will be made has order number 1.
Visit Type	Screening, Rescreening, or Enrollment. If Screening is selected, the visit due date will be based on the screen date. If Rescreen is selected, the visit due date will be based on the rescreen date. If Enrollment is selected, the visit date will be based on the enrollment date. The choices in this drop-down list are configured by using the CLNCL_SUBJ_VST_TMPL_TYPE type in the List of Values.

- 5 For each visit record, in the Activities record, create a set of activity records to describe the procedures and tasks required for the visit.

Some of the fields in the Activities record are described in the following table.

Field	Comments
Duration	Length of time the activity is estimated to take.
Payment Amount	The standard amount that the investigator is to be paid for this activity. This amount may be adjusted on a per site or per individual basis.
Payment Flag	Select this flag if the investigator is to be paid for this activity.

For more information about payments, see [Chapter 15, “Setting Up and Making Subject Activity Payments.”](#)

Creating Documentation Tracking Activities

Numerous documents are collected during clinical trials, either as electronic files or as paper. These documents must be tracked and periodically updated. Documents can be associated with sites, regions, protocols, contacts or accounts.

To create documentation tracking activities

- 1** From the application-level menu, choose View > Site Map > Document Tracking.
- 2** In the Document Tracking list, add a record and complete the necessary fields.

NOTE: A document tracking activity can be associated with only one of the available tracking levels or entities.

Some of the fields in a Document Tracking record are described in the following table.

Field	Comments
Name	The document name. This is a hyperlink to the associated Attachment view.
Site, Region, Protocol, Contact, or Account	Delegate the document to one of these fields. The field you select determines how the hyperlink in the Name field operates. This field is a hyperlink to the associated Activities view.

To update and add existing documentation for tracking

- 1** From the application-level menu, choose View > Site Map > Document Tracking.
- 2** In the Document Tracking list, query for the document you want to update.
- 3** Click the document name hyperlink.
The associated Attachment view appears.
- 4** In the Attachment list, query for the document, and click the document name.

- 5 Open, update and save the document.
- 6 Use the thread bar to return to the document record on the Document Tracking list.
- 7 Copy the original document record and revise the associated site, region, protocol, contact, or account field.

Refer to [“To create documentation tracking activities” on page 305, Step 2](#), for descriptions of some of the fields in a Document Tracking record.

Revising Protocols

If a protocol is revised or amended, you may need to create a new version of the subject visit template to reflect the changes made in the protocol.

NOTE: Different sites can carry out different versions of the template at the same time.

To create a new version of the subject visit template

- Copy the current template version record, and edit the version number, visits, and activities as necessary.

Or

- Create a new (blank) template version record as described in [“To add a subject visit template” on page 302, Step 3 to Step 5](#).

For information about applying a new version of a subject visit template to an enrolled subject, see [“To apply a new version of the subject visit template for an enrolled subject” on page 316](#).

End-User Procedures

This section provides instructions for the following tasks:

- [To add an account](#)
- [To add a contact on page 308](#)
- [To add a site on page 309](#)
- [To enter and screen a subject on page 312](#)
- [To rescreen a subject on page 314](#)
- [To enroll a subject on page 315](#)
- [To apply a new version of a subject visit template to a site on page 316](#)
- [To apply a new version of the subject visit template for an enrolled subject on page 316](#)
- [To create graphical charts on page 318](#)

Adding an Account and Contacts

An *account* is the institution from which clinical trials are managed. Typically, it is the facility where the investigators conduct the trials. More than one site can be associated with an account, and one account can be carrying out multiple protocols. IRBs (institutional review boards), central labs, CROs (clinical research organizations), and other subcontractors may also be tracked as accounts.

Contacts is the term used for personnel working at clinical sites. This includes the investigators, typically medical professionals who are also researchers, and site coordinators, who may be the practicing nurses administering the treatment plan according to the clinical protocol.

Bulk loading of data on accounts and contacts is generally performed by the Siebel administrator, but end users may add and modify these records as needed. (See [Chapter 19, "Importing Data."](#))

To add an account

- 1 Navigate to the Accounts screen.

- From the Show drop-down list, select My Accounts.
- In the Accounts list, add a record, and complete the relevant fields. (To access more fields, click the show more button in the account form.)

Some fields are described in the following table.

Field	Comments
Account Type	Hospital, Clinic, IRB, and so on. The choices in this drop-down list are configured by using the ACCOUNT_TYPE type in the List of Values.
Address Line 1	Allows you to add addresses for the account by picking from existing addresses or by entering new addresses. Avoid duplicating addresses by checking if the address exists before entering a new one.
Site	Description of the location or function of the account, such as “headquarters” or “corporate” or “San Francisco.”
Synonyms	Allows you to refer to accounts in the way that you prefer. For example, an account named A/B Products, Inc., might have the following synonyms: AB, A/B, and AB Products. When you search for an account or enter an account in another part of your Siebel application, you can use a synonym instead of the actual name.
Team	Multiple users can be assigned to the account team. The team member who creates the account record is indicated as primary team member.

- Use the views tabs to access other views such as Account Team, Activities, Addresses, and so on to add more information to the account record.

For more information about creating and maintaining account affiliations, see [Chapter 7, “Administering and Managing Accounts.”](#)

To add a contact

- Navigate to the Contacts screen.
- From the Show drop-down list, select My Contacts.

- 3 In the Contacts list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Address	The contact can have more than one address. One address must be specified as primary. Each CRA assigned to the contact can specify a different address as primary. For example, one CRA might specify a private office as the primary address, while another CRA might specify a hospital department as the primary address.
Team	Multiple CRAs can be assigned to the contact. The team member who created the record is indicated as primary.

- 4 Add or associate additional information with the contact's record, using the other views on the screen.

For example, use the Relationships view to associate site coordinators and other site personnel with the contact.

For more information about creating and maintaining contact records, see [Chapter 3, "Managing Contacts."](#)

Adding a Site

The *site* is the group at an account, headed by a principal investigator, who carries out a particular protocol. In Siebel eClinical, a separate site record must exist for each unique combination protocol, account, and principal investigator.

To add a site

- 1 Navigate to the Site Management screen.
- 2 From the Show drop-down list, select My Sites.

- 3 In the Sites list, add a record, and complete the necessary fields. (To access more fields, click the show more button in the form.)

Some of the fields in a Sites record are described in the following table.

Field	Comments
Account	The institution where the protocol is to be carried out.
Address	Select one of the principal investigator's addresses as the site address.
Currency Code	The currency that is used to display the payments, costs, and budgets for the site.
Exchange Date	The date that determines the exchange rate of the currency used. By default, the exchange date for the site is the date the site is created. This date may be changed in response to changes in currency rates. However, changes made to the exchange date at the site level take effect only when the exchange date also changes at the system level. For more information, see <i>Applications Administration Guide</i> .
PI Last Name	Last name of the principal investigator. If an account has already been specified for the site, use Affiliated Contacts in the Pick Contacts dialog box to view only those who are affiliated with the account.
Protocol #	Select from list of existing protocols in the Pick Protocol dialog box.
Region	If regions are required for this protocol, enter a region name.
Status	Planned, Initiated, Enrolling, Closed The choices in this drop-down list are configured by using the CLNCL_PROTOCOL_SITE_STATUS type in the List of Values.
Team	The Primary flag defaults to the creator of the site record. The flag can only be changed by the manager of the team through the My Team's Sites view. This is consistent with the best practice because resource management is normally a manager's responsibility. See Step 4 for information on entering.
Version	See Step 5 for information on entering.

- 4** To enter team members, click the select button in the Team field, select a team member in the Team picklist, and click Position Rollup.

The team member is automatically added to the region that the site belongs to, if the region required flag is checked, and to the protocol to which the site belongs.

- 5** Enter a version for the subject visit template to be used at the site.
- a** In the Version field, click the select button to open the Template Versions dialog box.
 - b** Click New.
 - c** Select the protocol and version template you want to use to create subject visit schedules for the site, and click OK.

The template versions are filtered to display only those related to your protocol.

- d** Enter the IRB Approval Date for the selected version.
The template version cannot be activated without the IRB approval date.
- e** Click the Active field to make the selected version the active version at the site.

Only one version can be active at a time. The active template is used when activities are generated for a subject.

NOTE: The IRB Approval Date must be entered before the template can be activated.

- f** Close the Template Versions dialog box.
- 6** Add records for the principal investigator and other key site personnel.
For information, see [“To associate contacts with a site” on page 331](#).

Reviewing Documentation for Tracking

The CRAs review all the documentation required for meeting regulatory requirements at the site and assure that review deadlines are met.

To review and track documentation

- 1 Navigate to the Site Management screen.
- 2 From the Show drop-down list, select My Sites.
- 3 In the Sites list, query for the site for which you want to review documentation.
- 4 Click the Document Tracking view.

The Document Tracking list shows the required documents.

- 5 Optional: Complete the necessary fields to maintain a record of document events.

Adding a Subject and Setting Up Visits and Visit Activities

CRAs may enter information about clinical trial subjects. Once 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.

To enter and screen a subject

- 1 Navigate to the Site Management screen.
- 2 From the Show drop-down list, select My Sites.
- 3 In the Sites list, select the site for which you want to add subjects.
- 4 Click the Subjects view tab.

- 5 In the Subjects list, add a record, and complete the necessary fields.

Some of the fields in a Subjects record are described in the following table.

Field	Comments
Enrollment Id	This is the principal ID number for the subject. The value is entered when you click the Enroll button (Step 8 on page 317).
Informed Consent	An informed consent date must be entered before a subject can be enrolled in the protocol. See Step 3 on page 315 .
Randomization Id	An ID number for the subject, which can be used in studies where both an enrollment ID and a randomization ID are required.
Screen Failure Reason	The choices in this drop-down list are configured by using the CLINCL_REASON_EXCLUDED type in the List of Values.
Screening #	This field is based on the subject's initials and date of birth. It is automatically populated after Subject Initials and Date of Birth fields are entered and the record is saved.
Status	<p>A multi-value field that contains a history the subject's status.</p> <p>Primary. This flag sets the current status, which displays in the Status field of the Subjects view.</p> <p>Status. The status of the subject, for example, screened, enrolled, or re-screened. The choices in this drop-down list are configured by using the CLNCL_SUBJECT_STATUS type in the List of Values.</p> <p>Date. The date the status was changed or updated.</p> <p>Comments. Comments about the subject's status.</p>
Withdrawn Reason	The choices in this drop-down list are configured by using the CLINICAL_WITHDRAWN_REASON type in the List of Values.

- 6 Click the hyperlink in the Screening # field of the subject.

The Visits view of the Subjects screen appears.

7 To generate screening visits and activities:

- a** Click Screen in the Subject form.
- b** Enter the screen date in the Screening dialog box.

Screening visits and activities to take place in those visits appear in the Visits and Activities lists.

NOTE: A subject can be screened only once for each visit template. 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. (If the subject visit template has been updated since the last time the screen button was clicked, new screening visits are generated.) See [“Updating a Protocol Version at a Site” on page 316](#).

8 Optional: Edit subject visits dates.

For example, you might want to edit some subject visit dates so that visits are not scheduled on weekends.

If the rescheduled date falls outside the range specified by the subject visit template, the application displays a warning message, but *still reschedules the visit* according to the new date.

9 Optional: Add or modify subject visits or activities.

To rescreen a subject

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

- 1** Navigate to the Subjects screen, and select the subject who is eligible for the study. (The subject must have already been screened.)
- 2** Click Rescreen in the Subject form, and enter a rescreen date.

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

3 Optional: Edit subject visits dates.

- 4 Optional: Add or modify subject visits or activities.
- 5 Optional: Rescreen multiple times.

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

To enroll a subject

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

- 1 Navigate to the Subjects screen, and select the subject.
- 2 Click the Visits view tab.
- 3 Enter the informed consent date:
 - a Click the select button in the Informed Consent Dates field to open the Informed Consent dialog box.
 - b Click New.

The versions of the subject visit template appear in the drop-down list of the Add Informed Consent dialog box. Make sure to select the version before entering the informed consent date.

- c Click Add.
 - d In the Informed Consent Dates dialog box, enter an informed consent date for the subject, and close the Informed Consent Dates dialog box.

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

- 4 Click the Enroll button in the Subject form.
- 5 Enter the enrollment date and the enrollment ID in the Enrollment dialog box.

The enrollment date must be greater than or equal to the screen date.

- 6 Optional: Edit subject visit dates.

See [Step 8 on page 314](#) for more information about editing visit dates.

- 7 Optional: Add or modify subject visits or activities.

Updating a Protocol Version at a Site

When a protocol is revised mid-study, you need to update:

- The subject visit template version associated with the site.
- The visit schedules of any subjects already in the study.

To apply a new version of a subject visit template to a site

- 1 Navigate to the Site Management screen.
- 2 From the Show drop-down list, select My Sites.
- 3 In the Sites list, select the site for which you want to apply a new version of the visit template.
- 4 Enter the new version of the subject visit template in the Version field.

Make sure that the new version is active and that you enter the IRB Approval Date for the version.

For instructions on editing the Version field, see [Step 5 on page 311](#).

To apply a new version of the subject visit template for an enrolled subject

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site for which you want to update subject visits.
- 3 Click the Subjects view tab.
- 4 Click Apply Active Version.

This creates new records for the new version of the template in the Informed Consent Dates field for all subjects in this site except for those whose status is “Early Terminated” or “Completed.”

- 5** Navigate to the Subjects screen, and select the enrolled subject whose schedule you want to update for the revised subject visit template.
- 6** Click the Visits view tab.
- 7** Enter the informed consent date for the newer version as described in [Step 3 on page 315](#).
- 8** In the Subjects form, click Enroll, and click OK in the Enrollment dialog box.
Visits for the new protocol are appended to the Visits list.
- 9** Edit the Visit records.
Typically you would delete:
 - Future-scheduled visits from the original subject visit template version.
 - Past-scheduled visits from the new subject visit template version.

NOTE: Screening and rescreening schedules are revised in the same way, except that informed consent dates are not necessary for these types of visit.

Monitoring Subject Status and Enrollment Rates

You can view charts of:

- 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 the Protocols, Regions, or Site Management screen.
- 2** In the list, select the record for which you want to create the charts.
- 3** Click the Charts view tab.
- 4** To 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 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.

Reviewing Protocol Payments

End users can view a report of payments made to all sites in the protocol.

To review protocol payments

- 1** Navigate to the Protocols screen.
- 2** Select a protocol for which you want to review payments.
- 3** Click the Payments view tab.

- 4 In the application-level menu, select View > Report.

Setting Up and Carrying Out a Clinical Trial

End-User Procedures

Managing Sites and Clinical Contacts **14**

This chapter describes the tasks that the administrator and end users perform to update and maintain information about:

- Clinical trial sites
- Contacts (investigators and other site personnel)
- Accounts (hospitals and clinics where the trials are carried out)
- Employees on the site team
- Regulatory documentation relevant to recording the trials

Siebel Life Sciences' feature set allows you to record the relationships among these five entities.

This chapter also describes setting up and using:

- Site activity plans
- Contact assessments

Business Scenarios

These scenarios are example workflows performed by the administrator and the clinical research associates (CRAs). Your company may follow a different workflow according to its business requirements.

At the Beginning of the Clinical Trial

In preparation for the clinical trial, the administrator sets up templates to generate site activity plans for site initiation and to track documents.

When the CRAs begin work on a new clinical trial, they add new information and update existing information about accounts, contacts, and sites, and about the affiliations and associations among them. Maintaining accurate data is critical to successful clinical trials.

When a new contact is entered, the CRA requests that the administrator enter the contact's primary specialty and license number (such as a physician investigator's AMA number). Data cannot be entered in these fields from the CRAs' views.

From time to time, CRAs enter account or contact records incorrectly. Or, they discover that some account or contact records have become obsolete. The CRA then puts in a request to the administrator to have those accounts and contacts deleted. CRAs do not have the responsibilities needed to delete these records.

At the End of the Clinical Trial

Before the clinical trial ends, the administrator or the study manager creates a contact assessment template that each CRA can use to evaluate the performance of the investigators at the conclusion of the trial.

Similarly, the administrator can create assessment templates for use in screening and selecting investigators at the *beginning* of clinical trials.

CAUTION: In some countries, it is not permitted to evaluate the performance of site personnel. Please obtain legal advice before using the contact assessment feature in Siebel eClinical.

Workflow for Managing Site and Contact Information

This section details sample tasks often performed by administrators and end-users when managing site and contact information. Your company may follow a different workflow according to its business requirements.

NOTE: The administrative tasks described in this section must be performed before the related end-user task can be performed. For example, a clinical protocol site template must exist before the corresponding site activity plan can be created.

Administrator Procedures

The following list shows tasks administrators typically perform to manage site and contact information:

- **Create clinical protocol site templates.** An administrator creates templates that detail the activities that must be performed at all sites that are carrying out the same protocol. For more information, see [“Creating a Clinical Protocol Site Template” on page 325](#).
- **Create contact assessment templates.** The administrator or the study manager creates assessment templates that define weighted attributes for assessing a contact. For more information, see [“Creating an Assessment Template” on page 327](#).
- **Maintain contact and account data.** An administrator maintains records of contact license numbers and deletes erroneous or obsolete account and contact data. For more information, see [“Maintaining Contact and Account Information” on page 329](#).

End-User Procedures

The following list shows tasks end users typically perform when managing site and contact information:

- **Add and update contact, site, and account data.** CRAs record details about contacts, accounts, and sites. For more information, see [“Adding and Updating Site, Contact, and Account Records” on page 330](#).
- **Add employees to the site team.** Managers or CRAs add employees to the team associated with the site. For more information, see [“Assigning Employees to the Site Team” on page 331](#).
- **Create site initiation and document tracking activity lists.** CRAs use the clinical protocol site template that has been created by an administrator to plan a list of activities for each site. For more information, see [“Creating Site Activity Plans” on page 332](#).
- **Add, track, and update documentation.** CRAs and regional study managers post clinical trial and regulatory documentation for review at site, region, and protocol levels. For more information, see [“Tracking and Adding Documents at Sites” on page 335](#).
- **Assess investigators at end of the trial.** CRAs score each contact, based on the attributes defined in an assessment template. For more information, see [“Assessing an Investigator or Other Contact” on page 337](#).

Administrator Procedures

This section provides instructions for the following tasks:

- [To create a clinical protocol site template](#)
- [To create an assessment template on page 327](#)

This section provides information about:

- Entering specialty and license information
- Deleting contacts and accounts

See [“Maintaining Contact and Account Information” on page 329](#).

Creating a Clinical Protocol Site Template

Activities can be associated directly with sites. For example, all sites carrying out the same protocol need to perform similar site initiation activities and submit similar documents to the regulatory agencies. When many activities are common to multiple sites, the clinical protocol site template helps CRAs create site activities.

The clinical site protocol template is one of a number of activity templates used in Siebel eClinical. Others are subject visit templates ([“Defining a Subject Visit Template” on page 300](#)), trip report templates ([“Creating a Trip Report Template” on page 354](#)), contact assessment templates ([“Creating an Assessment Template” on page 327](#)).

NOTE: Unlike trip report templates, clinical protocol site templates are protocol-specific. To use a clinical site template in association with more than one protocol, duplicate the record and then edit the Protocol Title field.

To create a clinical protocol site template

- 1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.

- 2 In the Activity Templates list, add a record, and complete the necessary fields.

Some of the fields in an Activity Template record are described in the following table.

Field	Comments
Auto Trigger, Public, Sales Method, Sales Stage	Typically, these fields are not used in a clinical protocol site template.
Protocol Title	The protocol with which the clinical protocol site template will be used. This field must be completed.
Type	Must be Clinical Protocol Site.

- 3 Click the Activity Template Details view tab.
- 4 In the Activity Template Details list, add a record, and complete the necessary fields.

Some of the fields in an Activity Template Details record are described in the following table.

Field	Comments
Activity	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values. For document tracking, use either Document or Site Initiation.
Budgeted Cost, Cost Estimate	Typically, these fields are not used in a clinical protocol site template.
Lead	The time after the planned start date when the activity is due.
Priority	The choices in this drop-down list are configured by using the ACTIVITY_PRIORITY type in the List of Values.
Status	Leave this field blank or set it to a value such as Planned, Not Started, or Auto-Created. The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.

Field	Comments
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values and setting the Parent LIC to the activity type.
Units	Units for lead time.

- 5 Add a record for each activity that you want to appear in the template.

Creating an Assessment Template

The purpose of the assessment is to determine a single total score or a percentage that can be used to rank a contact.

The total score for the assessment is determined by summing weighted scores for each assessment attribute:

$$\text{Total_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Score}_i)$$

where n is the number of assessment attributes in the template.

The score is also calculated as a percentage of the maximum score possible:

$$\text{Max_Total_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Max_Score}_i)$$

where Max_Score_i is the largest score for any value in the Attribute Values list for the i th attribute. For example, in [Step 4 on page 329](#), the largest score in the Attributes Values list is 10.

To create an assessment template

- 1 From the application-level menu, choose View > Site Map > Application Administration > Sales Assessment Templates.

- 2 In the Assessment Templates list, add a record, and complete the necessary fields.

Some of the fields in an Assessment Templates record are described in the following table.

Field	Comments
Assessment	The name of the template.
Sales Method, Sales Stages	Typically, these fields are not used in an assessment template.
Type	Must be Contact for Contact Assessments.

- 3 In the Assessment Attributes list, add a record for each attribute you want to assess.

Some of the fields in an Assessment Attribute record are described in the following table.

Field	Comments
Name	Name of the attribute.
Order	Indicates the attribute's position in the Assessment Attributes list.
Weight	Relative importance of the attribute.

- 4 For each assessment attribute, create a record for each possible value of the attribute. These values will appear in the Pick Attribute Value dialog box when the end user applies the template. See [“To assess an investigator or other contact” on page 337](#).

Some fields in the Attribute Value record are described in the following table.

Field	Comments
Description	Additional information about the value to help the assessor.
Order	Indicates the value’s position in the Attribute Values list.
Score	The number of points that the value represents.
Value	The name of the value, for example Excellent, Good, or Average.

Maintaining Contact and Account Information

The end users are responsible for much of the day-to-day maintenance of their account and contact data. However, there are a few tasks for which the administrator is responsible. These are:

- Entering data into the primary specialty field and the license number fields for contacts. See [“Primary Specialty and Unique Identifiers” on page 51](#).

NOTE: If the specialty type you need is not available, enter it by following the procedure, [“To define a specialty” on page 52](#).

- Deleting contact and account records that were added in error or are obsolete. See [“To delete a contact” on page 53](#) and [“To delete an account” on page 188](#).

End-User Procedures

This section provides instructions for the following tasks:

- [To assign activities to a site using a template on page 332](#)
- [To track documentation milestones on page 335](#)
- [To assess an investigator or other contact on page 337](#)

This section provides information about:

- Adding site, contact, and account records
- Indicating affiliations between accounts and contacts

Adding and Updating Site, Contact, and Account Records

It is important to maintain accurate information in the Siebel eClinical database. End users need to keep data about their sites, accounts, and investigators up to date. To do this, they create new records, modify existing records, and request that their administrator delete obsolete records. In addition, they create and maintain the relationships (affiliations) among their contacts, accounts, and sites.

For more information, see the following topics:

- [“To add an account” on page 307](#)
- [“To add a contact” on page 308](#)
- [“To add a site” on page 309](#)
- [“To indicate an affiliation between contacts” on page 63](#)
- [“To indicate an affiliation between an account and a contact” on page 200](#)
- [“To indicate an affiliation between accounts” on page 201](#)

To associate contacts with a site

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site with which you want to associate contacts.
- 3 Click the Contacts view tab.
- 4 In the Contacts list, add a record, and complete the necessary fields.

Some of the fields in the Contacts record are described in the following table.

Field	Comments
Last Name	Affiliated Contacts filters the names in the Pick Contacts dialog box, displaying only those contacts associated with the site's account.
Role	The choices in this drop-down list are configured by using the CONTACT_ROLE type in the List of Values.

TIP: Do not forget to add your principal investigator to the Contacts list.

Assigning Employees to the Site Team

CRAs assign employees to the site team. The team members can be rolled up and made visible at the region and protocol levels.

NOTE: If the CRA is working from a mobile Web client, the administrator must set up position rollup on the Web client. For more information, see [“Setting Up Mobile Web Clients for Position Rollup” on page 30](#).

Before an employees can be added to the site team, an administrator must set up the employee record. For more information, see *Applications Administration Guide*.

To assign employees to the site team

- 1** Navigate to the Site Management screen.
- 2** In the Sites list, select the site to which you want to add employees.
- 3** In More Info, click the show more button.
- 4** In the Team field, click the select button.
The Access List dialog box appears.
- 5** In the Access List dialog box, click the New button.
The Add Employees dialog box appears.
- 6** Query for the employee that you want to add to the team and click OK.
The employee now appears in the Access List dialog box.
- 7** Click Position Rollup.
The employee is added to the team at the region and protocol levels.

Creating Site Activity Plans

A site activity plan is a list of activities and documents associated with the site.

Although activities can be created without a template, using a clinical protocol site template as described here makes creating site activity plans more efficient.

For information on creating templates, see [“To create a clinical protocol site template” on page 325](#).

To assign activities to a site using a template

- 1** Navigate to the Site Management screen.
- 2** In the Sites list, select the site to which you want to assign activities.
- 3** Click the Activity Plans view tab.

- 4 In the Activity Plans list, add a record, and complete the necessary fields.

Some of the fields in an Activity Plan record are described in the following table.

Field	Comments
Planned Start	Make sure that this date is correct before you choose a template. The due dates for the template-generated activities are based on this start date and on the lead time set in the template.
Lock Assignment	Determine whether the Lock Assignment field should be selected. If the activity is locked, Assignment Manager will not access it. If it is unlocked, Assignment Manager can reassign it.
Template	Only templates whose type is Clinical Protocol Site and whose protocol matches the protocol at the site are displayed. Only activities with type Document or Site Initiation are shown in the document tracking views.

5 Edit the activities in the Activities list or add more activities to the list.

Some of the fields in an Activities record are described in the following table.

Field	Comments
Completed Date	This field is tied to the Status field. When a date is entered in this field, the status field is automatically set to Done.
Expected Date	For document tracking: The date that the signed document is expected to come back from the site.
Received Date	For document tracking: The date that the signed document returns from the site.
Sent Date	For document tracking: The date that the document is sent to the site.
Status	This field is tied to the Completed Date field. When this field is set to Done, the Completed Date field is automatically set to the current date. The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.
Suppress Calendar	A check mark in this field indicates that the activity does not appear on the user's calendar.

NOTE: To view additional fields in this list, click the menu button and select Columns Displayed.

Tracking and Adding Documents at Sites

During the life of a clinical trial, CRAs need to collect and track numerous documents, including critical regulatory documents. CRAs can take advantage of the activity plans to generate a list of documents for tracking. In the document tracking views, they can also create their own lists of activities to track important dates.

NOTE: Regional study managers can use similar procedures to add and track documents at the Region level in the Regions screen.

To track documentation milestones

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site for which you want to track documentation.
- 3 Click the Document Tracking view tab.

A list of documents associated with the clinical trial appear.

- 4 Query for the document of interest and complete the necessary fields.

Some of the fields in a Document Tracking record are described in the following table.

Field	Comments
Activity	By default, the activity is Document.
Assigned To	The person to whom responsibility for the document has been assigned.
Expected Date	The date that the signed document is expected to come back from the site.
Expiration Date	The date the document expires.
Lock Assignment	Determine whether the Lock Assignment field should be selected. If the activity is locked, Assignment Manager will not access it. If it is unlocked, Assignment Manager can reassign it.

Field	Comments
Name	The name of the document. This field is a hypertext link to the Attachments tab.
Received Date	The date that the signed document returns from the site.
Sent Date	The date that the document is sent to the site.

To add a document to a site

- 1** Navigate to the Site Management screen.
- 2** In the Sites list, select the site for which you want to track documentation.
- 3** Click the Document Tracking view tab.

A list of documents associated with the clinical trial appears.
- 4** Add a record and complete the required fields.

Some of the fields in a Document Tracking record are described in [Step 2 of “To create documentation tracking activities” on page 305](#).
- 5** Step off the record you have just added and drill down on the Name hyperlink.

The Attachment view appears.
- 6** Add a record and in the Name field specify the file name or URL.
- 7** Check the Auto Update flag if you want to have the file automatically updated during synchronization.

This applies only to local files. If a file is not local, it cannot be updated during synchronization.

Assessing an Investigator or Other Contact

Assessments allow end users to calculate a single numerical value that expresses the fitness of a contact, according to a set of attributes defined in the assessment template. For example, an investigator may be assessed to determine fitness to carry out a large scale phase III clinical trial. The results of this assessment help CRAs find suitable investigators for subsequent trials.

NOTE: The application automatically updates the score values in the Assessment Attributes list and the (total) score value in the Assessments list.

For information on creating templates, see [“To create an assessment template” on page 327](#).

To assess an investigator or other contact

- 1** Navigate to the Contacts screen.
- 2** In the Contacts list, select the contact whom you want to assess.
- 3** Click the Assessments view tab.
- 4** In the Assessments list, add a record.
- 5** In the Template Name field, select the assessment template that has been prepared for you. (For more information, see [“Creating an Assessment Template” on page 327](#).)

The application fills in other fields in the record when the record is saved.

- 6** In the Assessment Attributes list, for each attribute:
 - a** Enter a Value by selecting from the Pick Attribute Value dialog box.
 - b** Add or edit comments in the Comment field of the attribute.

Setting Up and Making Subject Activity Payments **15**

This chapter describes managing payments for subject activities made to the site.

- Set up payment amounts in the subject visit templates
- Set up payment amounts on a per site basis (called site-level budgeting or payment exceptions)
- View and generate payments to the site or investigator for subject or site activities carried out

About Activity Payments

Payment amounts are set and adjusted at three levels:

- Standard payment amounts are set by the administrator through the subject visit template
- Exceptions to standard payment amounts are set according to agreements negotiated by individual sites
- Payments can be further adjusted on a one-off only basis before the payment is generated

Not all subject activities have payment amounts associated with them. For example, obtaining informed consent may be a subject activity for which the site is not paid, but a site would be paid for performing a blood test. Subject activities for which the site can be paid are referred to as *payment subject activities*. (In the Siebel eClinical interface, these activities are indicated by the Payment Flag.)

In addition to subject activities, sites can be paid on other activities created at the site level, such as IRB fees and equipment costs. Those activities can be flagged as payable to the site with the Payment Flag.

NOTE: For information about managing budgets at the protocol level, see [Chapter 17, “Managing Clinical Projects.”](#)

You can use multiple currencies for a protocol. Currencies and exchange rate dates are set at three levels:

- **Protocol level.** A single currency code and exchange date is associated with a protocol record. All payments made to sites for the protocol are converted to and rolled up in the protocol currency.
- **Region level.** If regions are used for the protocol, you should set a currency code and exchange date for the region. All site payments made in that region are converted to and rolled up in the region’s currency.
- **Site level.** You should set a currency code and exchange date for each site. When you use a subject visit template to create subject visits and activities, all payment activities are converted to the currency specified for the site on the exchange date that is set at the site level.

For more information on setting up currency conversions, see *Applications Administration Guide*.

Business Scenario

This scenario is an example workflow performed by the study manager and the clinical research associates (CRAs). Your company may follow a different workflow according to its business requirements.

Based on the input from the clinical contract or grant negotiations group, the study manager sets up the standard payment amounts for procedures and tasks that the site performs.

The CRAs set up the payment exceptions for sites where different payments have been negotiated for subject activities. (In some organizations, this task is done by study manager instead of the CRA.)

As the sites carry out the procedures, the CRAs verify successful completion of the procedures and tasks and generate payments for these activities.

Occasionally, the sponsor or CRO (clinical research organization) needs to make an additional payment to a site, a payment which is not directly associated with subject activities. These are ad hoc payments, for example, reimbursement for an unscheduled visit.

NOTE: As the clinical trial progresses, the sites carry out the subject activities for which they are paid. Typically, site personnel at the sites enter completed dates for subject activities using the Site Portal application. For more information about Siebel Site Portal, see *Siebel Life Sciences Portals Guide*.

Example Workflow for Setting Up and Making Subject Activity Payments

This section details sample tasks often performed by administrators and end-users when setting up and managing subject activity payments, performed by study managers and CRAs. Your company may follow a different workflow according to its business requirements. The tasks are generally carried out in the order presented, although ad hoc payments can be made any time.

Administrator Procedures

Administrators set up payment amounts in the subject visit template. For more information, see [“Setting Up Standard Payment Amounts in the Subject Visit Template”](#) on page 343.

End-User Procedures

The following list shows tasks end users typically perform when managing subject activity payments. These tasks are typically performed in the following order:

- 1 Adjust payment amounts for individual sites.** For more information, see [“Setting Payment Exceptions for a Site”](#) on page 344.
- 2 Mark activities completed for payment.** For more information, see [“Marking Subject Activities Completed”](#) on page 345
- 3 Make final adjustments and generate payments.** For more information, see [“Adjusting Payment Amounts and Generating Payments for Sites”](#) on page 346.
- 4 Optional: Make ad hoc payments.** For more information, see [“Generating Ad Hoc Payments for Sites”](#) on page 348.
- 5 Roll up paid amounts.** For more information, see [“Rolling Up Paid Amounts to the Protocol Level”](#) on page 349.

Administrator Procedures

This section provides instructions for the following task:

- [To set up standard payment amounts for subject activities](#)

Setting Up Standard Payment Amounts in the Subject Visit Template

Payment amounts can be set up when the subject visit template is created (as described in [“Defining a Subject Visit Template” on page 300](#)) or may be added later following the procedure described here.

Payments at the site level may be entered in any currency. All payment amounts made at the site level are converted to the currency designated for the site and rolled up into the currency that is designated for the region. If a region is not required, payment amounts at the site level are rolled up into the currency that is designated for the protocol.

To set up standard payment amounts for subject activities

- 1** From the application-level menu, choose View > Site Map > Clinical Administration > Visit Templates.
- 2** Select the Subject Visit Template and Template Version for which you want to add payment amounts.
- 3** For each visit and each activity that the sites will be paid for:
 - a** Set the Payment Flag.

If the Payment Flag is not selected, the activity will not appear in the Payment Activities view and a payment cannot be generated.
 - b** In the Payment Amount field, use the currency calculator to enter the amount and currency code.

End-User Procedures

This section provides instructions for the following tasks:

- [To set site-specific payment amounts for subject visit activities on page 344](#)
- [To mark subject activities as completed on page 345](#)
- [To make final adjustments to the payment amounts and generate payments on page 346](#)
- [To generate an ad hoc payment on page 348](#)
- [To roll up payment amounts for a protocol on page 349](#)

Setting Payment Exceptions for a Site

The amount paid to individual sites for a particular procedure may differ from the standard amount set in the subject visit template ([“Setting Up Standard Payment Amounts in the Subject Visit Template” on page 343](#)), or the currency used at the site might differ from the currency used for the standard amount.

The procedure below explains how to use payment exceptions to change the standard amount paid for a payment subject activity for an individual site.

Once the payment exception has been set for an activity associated with the given site, visit, and template version, each time the activity is generated for a subject the activity will show the site-specific amount.

NOTE: When a new subject visit template becomes active, payment exceptions need to be set for the new template.

To set site-specific payment amounts for subject visit activities

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site for which you want to set up payment exceptions.
- 3 Click the Payment Exceptions view tab.

- 4 In the Payment Exceptions list, add a record.

The Payment Exceptions dialog box filters payment subject activities to show only those for the current protocol version. However, you can query from the set of all subject payment activities with Payment Flag selected across all versions and protocols. This way, you can set payment exceptions for activities in protocol version 2 *and* in protocol version 1, for example, if the site is expected to transition to the newer version in the near future.

- 5 In the Payment Exceptions dialog box, select all activities for which you want to set payment exceptions, and click OK.
- 6 In the Exception Amount fields, enter the new amounts that are to be paid to this site for each activity.

TIP: To edit the Exception Amount for multiple activities at once, use the Change Records command on the menu button of the Payment Exceptions list.

NOTE: The Exception Amount to be paid at the site level may be in a different currency than the currency designated in the subject visit template or for the site. When subject activities are created at a site, the currency is converted to the currency designated for the site.

Marking Subject Activities Completed

Usually the site personnel will use the Site Portal Web site to enter when subjects complete activities. However, this task can also be performed by the CRA using Siebel eClinical, as shown in [“To mark subject activities as completed.”](#)

To mark subject activities as completed

- 1 Navigate to the Subjects screen, and select the subject whose activities have been completed.
- 2 Click the Visits view tab.
- 3 In the Visits list, select the visit that has just been completed.

- 4 In the Activities list, click Check All.

This marks the selected visit and all of its 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 fields in the Activities list.

Adjusting Payment Amounts and Generating Payments for Sites

Although payments are generally set on per-site basis (“[Setting Payment Exceptions for a Site](#)” on page 344), occasionally the CRA may want to make additional adjustments to the amount paid for a given payment activity.

Once the CRA has finalized the amounts, payments are generated for all completed payment subject activities in the currency specified for the site. Each payment record is given a unique identity number. Other information, such as check number, check date, and check amount, can be entered later, either manually or by importing the data from a back-office finance system.

To make final adjustments to the payment amounts and generate payments

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site for which you want to generate payments.
- 3 Click the Payment Activities view tab.

This view lists all scheduled payment subject activities for subjects associated with the site.

- 4 Optional: Adjust the Actual Amount to be paid to the site by entering a value in the Deviation Amount field.

Standard Amount + Deviation Amount = Actual Amount

- 5 Check Payment Completed and click Generate Payment.

The application removes the completed payments from the Payment Activities list.

- 6** Click the Payments view tab.

The payment generated in [Step 5](#) appears in the Payments list.

- 7** Complete the fields in the Payments record.

Some of the fields in a Payments record are described in the following table.

Field	Comments
Check Amount	The amount for the check. This is usually, but does not need to be the same as the Earned Amount. The sum of all values in the Check Amount column equals the Paid to Date value of the site.
Earned Amount	The sum of the Actual Payment amounts for the completed payment subject activities. The sum of all values in the Earned Amount column equals the Earned to Date value of the site.
Payment #	The application automatically generates this unique number.
Type	For payment subject activities, this field defaults to Activity. The choices in this drop-down list are configured by using the PAYMENT_TYPE_CODE type in the List of Values.

In a larger organization, an employee in the financial accounts department, rather than a CRA, might be responsible for supplying the check number, date, and amount. Information may also be automatically loaded from a back-office finance system.

- 8** Click Roll Up in the Payments list.

See [“To roll up payment amounts for a protocol” on page 349, Step 1](#), for more information about the Roll Up button.

- 9** Optional: Click the hyperlink in the Payment # field to view the payment activities associated with this payment.

Generating Ad Hoc Payments for Sites

Ad hoc payments not associated with subject activities can be created for sites.

To generate an ad hoc payment

- 1** Navigate to the Site Management screen.
- 2** In the Sites list, select the site for which you want to generate a payment.
- 3** Click the Payment Activities view tab.
- 4** In the Payment Activities list, add a record, and complete the necessary fields.

Some of the fields in a Payment Activities record are described in the following table.

Field	Comments
Activity Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values and setting the Parent LIC to the General.
Payment	This field must be selected.
Completed	This field must be selected.
Standard Amount	The payment amount.

- 5** Click Generate Payment.

The application removes the completed payments from the Payment Activities list.

- 6** Follow [Step 6 on page 347](#) to [Step 9 on page 347](#) to complete the payment.

Rolling Up Paid Amounts to the Protocol Level

You need to use the Roll Up buttons to update the Paid to Date fields on the Protocol, Region, and Sites screens. These fields do not update automatically.

To roll up payment amounts for a protocol

- 1** Roll up paid and earned amounts for a site:
 - a** Navigate to the Sites Management screen.
 - b** Select a site.
 - c** Click the Payments view tab.
 - d** In the Payments list, click Roll Up.

This updates the Paid to Date and the Earned to Date fields in the Site form.

- 2** Repeat [Step 1](#) for each site in the region or protocol.
- 3** If the site belongs to a region, update the paid amount for the region:
 - a** Navigate to the Regions screen.
 - b** Select the region.
 - c** Click the Payments view tab.
 - d** In the Payments list, click Roll Up.

This updates the Paid to Date field in the Region form and makes any currency conversions that are required.

NOTE: When site payments roll up to the region level, the exchange rate is determined by the exchange date set at the region level.

- 4** If there are other regions associated with the protocol, repeat [Step 3](#) for each region.

5 Roll up paid amounts for the protocol.

- a** Navigate to the Protocols screen.
- b** Select the protocol.
- c** Click the Payments view tab.
- d** In the Payments list, click Roll Up.

This updates the Paid to Date field in the Protocol form and makes any currency conversions that are required.

NOTE: When site payments roll up to the protocol level, the exchange rate is determined by the exchange date set at the protocol level.

This chapter describes how to set up and use trip reporting in Siebel eClinical.

The study managers or clinical administrators can set up templates for trip reporting. These templates are then used by the clinical research associates (CRAs) when they create trip reports to record their visits to sites.

Advantages of using the trip reports in Siebel eClinical are:

- Trip reports are made consistent across the organization and are based on GCP (Good Clinical Practice) and SOPs (standard operating procedures)
- CRAs save time planning trips and writing trip reports
- Managers save time reviewing trip reports
- A formatted, tamper-proof report for print or PDF can be generated from the trip report record
- A central repository for all trip reports

Business Scenario

This scenario is example workflow performed by the clinical administrator and the clinical research associates (CRAs). Your company may follow a different workflow according to its business requirements.

The Clinical Administrator

In this scenario, a clinical administrator prepares a set of trip report templates for the CRAs to use when preparing for and writing up their visits to clinical sites.

The clinical administrator decides to prepare four templates, one for each type of site trip the CRAs are typically required to perform:

- **Site evaluation.** A site visit to evaluate a site's qualification for a study
- **Site initiation.** A site visit to initiate a site
- **Site monitoring.** A site visit to monitor study progress, to monitor and retrieve case report forms (CRFs)
- **Site close-out.** A site visit to close-out or terminate a site at the conclusion of a study

The CRAs

The CRA is the end user of the Siebel eClinical product. Before visiting a site, the CRA uses the trip report feature to prepare for the visit. The follow-up items list reminds the CRA of the open activities arising from previous visits that need to be closes.

After preparing a draft trip report, the CRA makes a hard copy of the report that she takes with her on the site visit. She refers to this to help her keep track of the activities she carries out while at the site.

On her return from a site visit, the CRA completes her trip report and generates a final report. She forwards this report to her manager for approval. After approval, she (or her manager) archives the report (an ROI file) as an attachment to the site record.

Example Workflow for Clinical Trip Reports

This section details sample tasks often performed by administrators and end-users when administering clinical trip reports. Your company may follow a different workflow according to its business requirements.

Administrator Procedure

Administrators create trip report templates. For more information, see [“Creating a Trip Report Template” on page 354](#).

End-User Procedures

The following list shows tasks end users typically perform when administering clinical trip reports. These tasks are typically performed in the following order:

- 1 Create trip report record.** Before a visit, you can use a trip report template to prepare an activities checklist and follow-up items. For more information, see [“Creating a Trip Report Before a Site Visit” on page 356](#).
- 2 Complete, distribute, and archive a trip report.** After visiting a site, use the Trip Report view to record activities accomplished, site personnel met, and follow-up items. For more information, see [“Completing a Trip Report After a Site Visit” on page 359](#).

Administrator Procedures

This section provides instructions for the following task:

- [To create a trip report template](#)

Creating a Trip Report Template

Typically, the clinical administrator prepares a number of generic trip report templates, perhaps one designed for each of the different stages in the study. (See [“The Clinical Administrator” on page 352.](#))

The trip report template is an activity template of type Clinical Trip Report. This is one of a number of activity templates used in Siebel eClinical.

Other activity templates used in Siebel eClinical are subject visit templates ([“Defining a Subject Visit Template” on page 300](#)), clinical site templates ([“Creating a Clinical Protocol Site Template” on page 325](#)), and contact assessment templates ([“Creating an Assessment Template” on page 327](#)).

To create a trip report template

- 1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2 In the Activity Templates list, add a record, and complete the necessary fields.

Some of the fields in an Activity Template record are described in the following table.

Field	Comments
Protocol Title	Typically, this field is not used in a trip report template. This field is used when creating a clinical protocol site template. See “To create a clinical protocol site template” on page 325.
Type	Must be Clinical Trip Report.
Auto Trigger, Public, Sales Method, Sales Stage	These fields are not applicable to a Clinical Trip Report.

- 3** Click the Activity Template Details view tab.
- 4** In the Activity Template Details list, add a record, and complete the necessary fields to describe an activity for trip or a follow-up item to be carried out after the trip.

Some of the fields in an Activity Template Details record are described in the following table.

Field	Comments
Activity	Must be Check List for the activity to appear in the Checklist Activities of the Trip Report Detail view. The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values.
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values and setting the Parent LIC to Check List.
Status	Leave this field blank, or set it to a value such as planned, not started, or auto-created. The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.
Budgeted Cost, Cost, Cost Estimate, Duration, Lead, Units, Priority	Typically, these fields are not used in a clinical trip report.

- 5** Add a record for each of the activities that you want to appear in the template.

End-User Procedures

This section provides instructions for the following tasks:

- [To create a trip report](#)
- [To print or email a trip report on page 358](#)
- [To complete a trip report on page 359](#)
- [To distribute and archive a trip report on page 361](#)

Creating a Trip Report Before a Site Visit

Although a trip report is designed to be written after a site visit, it can be used during a site visit to guide the CRA through a list of required activities.

The Trip Reports view contains two lists:

- **Checklist Activities.** Activities in this list can be generated by the trip report template or can be added individually.
- **Follow-up Items.** These are the activities that need to be followed up later. They can be created during the current trip or carried forward from previous trips until they are closed. You can create new follow-up items in the Current Trip Follow-Up Items list. Also you can choose to display all follow-up items for a site, or you can filter the list to display only open and recently closed items.

To create a trip report

- 1 Navigate to the Site Management screen.
- 2 In the Sites list, select the site for which you want to create the trip report.
- 3 In the More Info view, click Trip Report.

This creates a new trip record in the Trip Report view and automatically fills in some fields as appropriate for the selected site.

4 Complete or edit other fields in the Trip Report form.

Some of the fields in a Trip Report form are described in the following table. See also [Step 2 on page 360](#).

Field	Comments
Completed Date	Defaults to the current date.
Start Date	Defaults to the current date and time.
Owned By	This field defaults to the creator of the trip report. Other names can be added to indicate a shared trip report.
Type	The nature of the trip, for example, prestudy, site initiation, or site monitoring. The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values and setting the Parent LIC to Trip Report.
Visit Name	A descriptive name for the trip report.

5 In the Template field, select the name of the trip report template that you want to apply.

When you click off the Template field, the activities defined in the template appear in the Checklist Activities list.

If you select a second template, the activities from the second template are appended to the activities generated by the first template. For example, you would do this if you wanted to combine a site monitoring trip with a site close-out trip.

- 6** Optional: Edit the activities in the Checklist Activities list, or add more activities to the list.

Some of the fields in a Checklist Activities record are described in the following table.

Field	Comments
Status	The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.
Suppress Calendar	When selected, this field indicates that the activity does not appear on the user's calendar.

- 7** If there are follow-up items from previous trips review them:
 - a** In the Current Trip Follow-Up Items list, from the drop-down menu, select All Follow-Up Items.

This displays all follow-up issues for that site (open and closed; past, present, and future).
 - b** Click Filter.

This displays all the open-to-date follow-up items and any follow-up items that were closed between completed dates of the last trip and the current trip.

To print or email a trip report

- 1** Navigate to the Trip Report view of the Site Management screen.
 - a** Navigate to the Site Management screen.
 - b** In the Sites list, select the site associated with the trip report.
 - c** Click the Site Visits view tab.

NOTE: Do not click the Trip Report button on the Site Visits list unless you want to create a *new* Trip Report record.

- d** Click the hyperlink in the Start Date field of the visit.

The Trip Report view appears.

2 From the application-level menu, choose View > Reports.

3 Select and run the Trip Report report.

This opens the Siebel Report Viewer.

4 Print, email, or save the report.

For more information about the Siebel Report Viewer, see *Fundamentals*.

Completing a Trip Report After a Site Visit

After the site visit, the end users record details of their trips, such as:

- Which of the planned activities were completed
- What additional activities were carried out
- Which site personnel they met
- Any follow-up items arising from the trip

The records in the Trip Report Detail view can be updated and edited at any time. For this reason, it is likely that the end user will want to create a static report at the completion of the trip, using the Siebel Report Viewer. This read-only document is ideal for archiving: as a printed document, as a file, or as an attachment to the site record in the Siebel Life Sciences database.

To complete a trip report

1 Navigate to the Trip Report view, and select the trip report that you want to complete.

For details on how to do this, see [Step 1 on page 356](#).

2 Complete or edit fields in the Trip Report form.

Some of the fields in the Trip Report form are described in the following table. See also [Step 4 on page 357](#).

Field	Comments
Attendees	The contacts (site personnel) whom you met during the visit.
Completed Date	It is important to change the default date to the actual date that the trip was completed. This is because the Filter button in the All Follow-Up Items list uses this completed date to determine which closed follow-up items to display (Step 7 on page 358).

- 3 In the CheckList list, complete the Status and Comments fields for planned activities and add any unplanned activities that you may have carried out.
- 4 In the Current Trip Follow-Up Items list, add any follow-up activities resulting from the site visit.
- 5 In the Current Trip Follow-Up Items list, from the drop-down menu, select All Follow-Up Items and click Filter to display all open follow-up items and those closed between the current and previous trip.
- 6 Update the records for those follow-up items that were addressed during the site visit.

Some of the fields in a Current Trip Follow-Up Items record are described in the following table.

Field	Comments
Completed Date	It is important that this date be filled in. The filter in the All Follow-Up Items list uses this date to determine which closed follow-up items to display (Step 7 on page 358).
Status	This field automatically changes to Done when a completed date is entered for the item.

To create a case report form tracking activity

- 1 Navigate to the Trip Report view.
- 2 In the Case Report Forms Tracking view, add a record.
- 3 Click the select button in the Subject Initial field, select a subject and visit in the Pick Subject and Visits dialog box, and complete the necessary fields.

Some of the fields in the Case Report Forms Tracking list are described in the following table.

Field	Comments
Retrieved	This field is checked when the CRA retrieves the case report forms from the site.
Source Document	This field is checked when the case report form is source documented.
Subject Initial	The unique subject-and-visit combination associated to this case report. Note: Each record in the Pick Subject and Visits dialog box can only be used once for a case report.

To distribute and archive a trip report

- 1 Follow [Step 1 on page 358](#) to [Step 3 on page 359](#) to create a report in the Siebel Report Viewer.
- 2 From within the Siebel Report Viewer, email the report, for example, to colleagues and to a manager for approval.
- 3 From within the Siebel Report Viewer, save the report as an ROI file, and then close the Siebel Report Viewer.

For more information about the Siebel Report Viewer, see *Fundamentals*.

- 4 Navigate to the Site Management screen.
- 5 Click the Attachments view tab.
- 6 Add the ROI file as an attachment to the site record.

Administering and Using Clinical Trip Reports

End-User Procedures

Managing Clinical Projects **17**

This chapter is meant to be used as a supplement to the documentation for Siebel Professional Services Automation which is in *Siebel Professional Services Automation Guide* (Projects Management and Microsoft Project Integration chapters) and *Applications Administration Guide* (Professional Services chapter).

Siebel eClinical Projects is designed to help project managers manage clinical trial projects. The projects are associated with individual protocols. Timelines, milestones, costs, and resources can be entered, viewed, and updated from the Projects screen. The Microsoft Project integration feature allows data exchange between Siebel eClinical Projects and Microsoft Project.

Business Scenario

This scenario is example workflow performed by the administrator and the project manager for the clinical trial. Your company may follow a different workflow according to its business requirements.

Project Manager Tasks

The project manager works for a large clinical research organization (CRO) that has been awarded a contract to carry out a clinical trial for a pharmaceutical company. He is responsible for setting up and running the clinical trial project.

Setup and Staffing

First the project manager enters some basic information about the project into Siebel eClinical. Then he determines which employees should have visibility to the project data by entering them in the project access list.

To optimize the resource assignment, the project manager first enters the resource requirements in the team workbook, and then he uses Siebel Assignment Manager to help with the staffing. He specifies the roles, skills, competencies, and availability required for the team and lets Resource Manager find the best candidate for the roles.

For this large project the CRO may need some subcontractors to complete certain aspects of the project. Because the subcontractors are paid on an hourly rate, the project manager associates the appropriate billing rate list to the project. The project manager also needs to add employees of the subcontracting company to the subcontractor resource list.

Other external contacts and accounts can also be added to the project. For example, information about the central laboratory, and the primary contact at this laboratory are added.

Tasks, Activities, and Risks

Milestones can be set as tasks or activities. The project manager can create them within Siebel eClinical Projects or import them from a Microsoft Project file. Each Siebel activity has a budget, and the actual costs of these activities are updated as the project progresses. Periodically the project manager reviews these project costs, making sure that the project is staying within budget. Payments made to sites for subject activities are rolled up to the project costs.

Project risks are documented as they arise, as well as the resolution activities to address the risks.

Exchanging Data with Microsoft Project

To create a Gantt chart of the project milestones, the project manager exports the project data to a Microsoft Project file.

Example Workflow for Clinical Projects

This section details sample tasks often performed by administrators and end-users when managing clinical projects. Your company may follow a different workflow according to its business requirements.

Administrator Tasks

The following list shows tasks administrators typically perform to manage clinical projects. These tasks must occur before the project manager creates the project:

- **Creates various project activity templates.** These templates are used by many project managers carrying out similar clinical trials. For more information, see [“Creating a Project Activity Template” on page 368.](#)
- **Maintains the employee profiles of skills and competencies that are used by Siebel Assignment Manager.** For more information, see [“About Setting Up Employee Profiles” on page 370.](#)
- **Sets up the position types and rate lists.** These are required to allow subcontractors (and employees) to bill the project for their time. For more information, see [“Setting Up Position Types and Rate Lists for Billing” on page 371.](#)
- **Creates or modifies mapping templates for data exchange between the Siebel eClinical project and a Microsoft Project file.** For more information, see [“Mapping Siebel Project Fields to Microsoft Project Fields” on page 372.](#)

End-User Procedures

These tasks can be performed only after the administrator has completed the required preparatory work described in the previous topic, [“Administrator Procedures.”](#) These tasks may be carried out according to your company’s business needs:

- **Create a project record.** For more information, see [“Creating a Project” on page 377.](#)
- **Give employees access to the project; add contacts and accounts to the project’s team workbook.** For more information, see [“Associating People and Accounts with Projects” on page 378.](#)

- **Create activities and tasks.** For more information, see [“Adding Activities and Tasks to a Project”](#) on page 380.
- **Review project costs.** For more information, see [“Monitoring Project Costs”](#) on page 381.
- **Document project risks and resolution activities.** For more information, see [“Managing Risk”](#) on page 382.
- **Export project data to an MS Project file.** For more information, see [“About Exchanging Project Data with Microsoft Project”](#) on page 384.

Administrator Procedures

This section provides instructions for the following tasks:

- [To create a project activity template on page 369](#)
- [To add position types as products on page 371](#)
- [To create a rate list on page 371](#)
- [To create a mapping template on page 372](#)

This section also provides information about setting up employee profiles for use in Siebel Assignment Manager. (See [“About Setting Up Employee Profiles” on page 370.](#))

About Administrator Procedures

The procedures that an administrator needs to carry out in support of projects depends upon which features of the Projects will be used by the organization. You may not need to perform all the procedures listed here.

Creating a Project Activity Template

Activities can be created both within (Siebel) Projects screen and within Microsoft Project. If the study managers are primarily entering activities through the Projects screen, then creating project activity templates will be advantageous. If study managers are primarily importing activities from Microsoft Project file, then project activity templates need not be created.

Typically, the administrator prepares a number of project templates, perhaps each designed for a different stage in the life of a study.

The project is an activity template of type “Project.” Other activity templates used in Siebel eClinical are subject visit templates ([“Defining a Subject Visit Template” on page 300](#)), clinical site templates ([“Creating a Clinical Protocol Site Template” on page 325](#)), trip report templates ([“Creating a Trip Report Template” on page 354](#)), and contact assessment templates ([“Creating an Assessment Template” on page 327](#)).

To create a project activity template

- 1** From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2** In the Activity Templates list, add a record, and complete the necessary fields.

Some of the fields in an Activity Templates record are described in the following table.

Field	Comments
Auto Trigger, Public, Sales Method, Sales Stage	Typically, these fields are not used in a project activity template.
Protocol Title	This field is optional. A project activity template can be applied to any project, regardless of the protocol associated with the project.
Type	Must be Project.

- 3** Click the Activity Template Details view tab.
- 4** In the Activity Template Details list, add a record, and complete the necessary fields to describe an activity or milestone for the project.

Some of the fields in a Activity Template Details record are described in the following table.

Field	Comments
Activity	The value of this field determines the values available in the Type field. The choices in this drop-down list are configured by using the TODO_TYPE type in the List Values.
Budgeted Cost	Enter the budget for the activity.
Cost	If this field is selected, the Cost field will be editable in the generated activity. If the Cost flag is not selected, then any value in the Cost field in the generated activity is read-only.

Field	Comments
Cost Estimate	This field is usually left blank. A value entered here appears in the Actual Cost field of the generated activity.
Lead	The lead time plus the planned start date of the activity plan determine the planned start date of the activity.
Priority	Use this field to set a priority ranking, such as 2-High, for the activity.
Status	Leave this field blank, or set it to a value such as planned, not started, or auto-created. The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values and setting the Parent LIC to the activity type.
Units	Units for lead time.

- 5 Add a record for each activity that you want to appear in the template.

About Setting Up Employee Profiles

The end user may use Siebel Assignment Manager to automatically search the employee database for the available employees whose skills best fit the needs of the project. Siebel Assignment Manager requires that profiles of skills and competencies be set up for employees.

For information on using Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

Use of Siebel Assignment Manager is not required. The end user can assign team members directly into the Team Workbook view, without using Siebel Assignment Manager.

Setting Up Position Types and Rate Lists for Billing

If project team members are to bill their time to the project through the Team Workbook view, position types and rate lists should be set.

Position types, such as consultant, are set up as products and flagged as resources. Lists of hourly rates for the position types are then set up. When the rate list is applied to the project, the hourly rates for the team members are automatically supplied in the team workbook.

For more information about position types and rate lists for Professional Services, see *Applications Administration Guide*.

To add position types as products

- 1 From the application-level menu, choose View > Site Map > Product Administration.
- 2 In the Products list, add a record, and complete the necessary fields.

Some of the fields in a Products record are described in the following table.

Field	Comments
Product	A product (resource) name, for example, Consultant.
Project Resource	Check this field.

To create a rate list

- 1 From the application-level menu, choose View > Site Map > Pricing Administration > Rate Lists.
- 2 In the Rate Lists list, add a record, and complete the necessary fields.
- 3 In the Rate Lists list, drill down on the Rate List hyperlink.
- 4 In the Rate List Line Items list, add a record.
- 5 In the Add Position Types dialog box, select the Position Type and click OK.

This list of resources has been created as a product.

- 6 In the Rate List Line Items list, complete the remaining fields.

Mapping Siebel Project Fields to Microsoft Project Fields

If you want to exchange data between your project in the Siebel eClinical and an MPP file in Microsoft Project, you may need to set up mapping templates to define which Microsoft Project fields correspond to which Siebel eClinical project fields.

Some mapping templates have already been defined for you in the Project Mappings view of the Data Administration. However, you may want to create a new mapping template, or copy and modify an existing one.

For more information, see about Microsoft Project Field Mappings for Professional Services in *Applications Administration Guide*.

To create a mapping template

- 1 From the application-level menu, choose View > Site Map > Data Administration > Project Mappings.
- 2 In the Project Mappings list, add a record, and complete the necessary fields.
- 3 In the Mapping Categories list, add a record and, from the Category drop-down list, select a mapping category.
- 4 In the Category Fields list, add a record.
- 5 From the Microsoft Project Field Name drop-down list, select a field name.
- 6 In the Siebel Field Name field, enter the business component field name that will map to the Microsoft Project field.

NOTE: Continue to add information in the Mapping Categories list, and Category Fields list until the mapping template is complete.

End-User Procedures

This section provides instructions for the following tasks:

- [To create a project on page 377](#)
- [To add employees to a project on page 378](#)
- [To add a contact to a project using the Organization Analysis view on page 379](#)
- [To add a partner account to a project on page 379](#)
- [To add an activity to a project using a project activity template on page 380](#)
- [To create a task and associate activities to it on page 381](#)
- [To view costs associated with a project on page 382](#)
- [To add a risk and resolution activities to a project on page 382](#)

This section also provides information about Microsoft Project integration. (See [“About Exchanging Project Data with Microsoft Project” on page 384.](#))

About the Projects Screen

There are many views in the Projects screen for the standard Siebel eClinical application. Many implementations may choose to use only a subset of these views. Refer to [Table 15](#) for a brief description of each of the views that are available in the Projects screen.

Table 15. Views in the Projects Screen

View	Comments
Access	Use this view to provide project visibility. Add the names of the project team members and also managers or executives who want visibility to monitor the progress of the project. The Access view has a similar function to the Team field in other screens.
Activities	This view lists activities associated with the project. Activities in this view may have been created manually or by project activity templates. Activities belonging to tasks do not appear in this view. Depending on the mapping template used, activities may be tasks and summary tasks imported from Microsoft Project.
Activity Plans	Use this view to generate activities from project activity templates. Additional activities can be added manually to the activities already associated with an activity plan.
Agreements	Use this view to create and store subcontractor agreements. See the Project Contact Management chapter in <i>Siebel Professional Services Automation Guide</i> .
Attachments	Attach project documents in this view. For general information about attachments, see <i>Fundamentals</i> .
Calendar	This view shows a monthly calendar of the activities associated with the project. Activities belonging to tasks and standalone activities appear in this view. For general information about the calendar views, see <i>Fundamentals</i> .
Charts	Various analysis charts for backlog, cost, fees, revenue, and type can be plotted from this view.
Contacts	Use this view to maintain a list of contacts associated with the project. Enter names of employees in subcontracting or partner organizations.

Table 15. Views in the Projects Screen

View	Comments
Costs	This view shows budgeted and actual costs for the project: including costs associated with standalone activities and with tasks, and payments made to the sites or investigators for subject activities.
Clinical Contacts	Use this view instead of the Contacts and the Subcontractors views. The view contains two lists: one for contacts and one for accounts. Contacts entered in this view do not appear in the Organizational Analysis view.
Financial Profile	Use this view to gain an overall perspective of a project's financial information, status, and progress. Use this view to change the Delivery status for the project (green, yellow or red). For more information, see <i>Siebel Professional Services Automation Guide</i> .
Invoices	Use this view to create invoices for time and expenses logged against a project. For more information, see <i>Siebel Professional Services Automation Guide</i> .
Notes	Use this view to keep private and public notes about the project. For general information about the Notes view, see <i>Fundamentals</i> .
Orders	Use this view to create a product or material order and associate it with the project. For more information, see <i>Siebel Professional Services Automation Guide</i> .
Organizational Analysis	This view displays an organizational chart of contacts, showing the relationships between them.
Partners	<p>Use this view to maintain a list of partner accounts associated with the project.</p> <p>Use this view to keep a list of accounts associated with the project, such as vendors who handle printing of the clinical trial materials or the shipping of sample drugs.</p> <p>Because the Partners, Subcontractors, and Clinical Contacts views contain account information, depending on your business process, you may use one or more of these views to keep track of accounts associated with project.</p>
Plan Integration	Use this view to exchange data between the Siebel eClinical project and Microsoft Project. For more information, see about Microsoft Project integration in <i>Siebel Professional Services Automation Guide</i> .

Table 15. Views in the Projects Screen

View	Comments
Revenues	Use this view to associate multiple types of revenue with a project and to chart revenues. For more information, see <i>Siebel Professional Services Automation Guide</i> .
Risks	Use this view to maintain a list of the risks associated with the project and resolution activities required to address those risks.
Service Requests	Use this view to create a service request and associate it with the project. For more information, see <i>Siebel Professional Services Automation Guide</i> .
Status Report	Use this view to create a status report summarizing the project's progress, forecast, and issues. For more information, see <i>Siebel Professional Services Automation Guide</i> .
Subcontractors	Use this view to keep a list of subcontractors associated with the project. (Also see "Clinical Contacts" on page 375 and "Partners" on page 375 in this table.)
Task	Use this view to create and modify tasks for the project. Depending on the mapping template used, tasks may be tasks and summary tasks imported from Microsoft Project.
Team Workbook	Use this view to assign team members to roles in the project. This can be done manually or it can be done automatically using Siebel Assignment Manager. Team members must be listed in the workbook before they can be assigned to activities.
Time & Expense	Use this view to adjust and summarize time sheets and expense reports associated with the project. For more information, see about time sheets and expense reporting in <i>Siebel Professional Services Automation Guide</i> .

Creating a Project

The first step is to create the project record and to associate a protocol with the project.

NOTE: It is recommended that only one project be associated with a protocol. However, the application does not prevent the association of a protocol to multiple projects. In this case, costs associated with payments to sites are rolled up to each project.

To create a project

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, add a record.
 - a Enter the Start date and End date for the project.
 - b Associate a protocol with the project.
 - c Complete the remaining fields as necessary.

Some of the fields in a Project record are described in the following table.

Field	Comments
Account	For example, enter the name of the pharmaceutical company for whom this project is being carried out.
Actual Cost	This field is calculated by summing the actual costs of all the tasks, activities, and site payments associated with the project.
Budgeted Cost	This field is calculated by summing the budgeted costs of all the tasks, activities, and site payments associated with the project.
Currency	This field displays the currency in which all costs are evaluated.
Project #	A unique identification number for the project.

Field	Comments
Protocol #	All protocols in the database can be selected from this drop-down menu. The creator of the project is not required to be a member of the protocol team.
Rate List	If a rate list has been set up for the project team members, enter it in this field. Use the more button if this field is not visible. (See “Setting Up Position Types and Rate Lists for Billing” on page 371.)

Associating People and Accounts with Projects

Employees. Employees in Siebel eClinical can be given access to the project and added to the team workbook.

Contacts. Contacts can be associated with projects through the Contacts view, the Organizational Analysis view, and the Clinical Contacts view. The same contacts appear in the Contacts view and the Organizational Analysis view.

Accounts. Accounts can be associated with projects through the Partners view, the Subcontractors view and the Clinical Contacts view. Adding accounts to the Subcontractors view allows you to add employees from the subcontracting accounts to the project’s team workbook. (For more information about adding subcontractors, see *Siebel Professional Services Automation Guide*.)

To add employees to a project

- 1 Give employees visibility to a project by adding them to the Access view.

For more information about providing access to a project, see *Siebel Professional Services Automation Guide*.

- 2 Allow employees and subcontractors to be assigned to activities and to bill time to the project by adding them to the Team Workbook view.

If a rate list has been set up, make sure that the Resource field on the Resource Detail form of the Team Workbook view is set for the team members.

For more information about the team workbook for projects management, see *Siebel Professional Services Automation Guide*.

To add a contact to a project using the Organization Analysis view

- 1** Navigate to the Projects screen.
- 2** Select a project.
- 3** Click the Organization Analysis view tab.
- 4** From the Organization Analysis drop-down list, select Contacts.
- 5** In the Contacts list, add a record, and complete the necessary fields.
- 6** From the Contacts drop-down list, select Organization Analysis.

An organization chart of the contacts appears. Any employee-manager relationships set in [Step 5](#) are indicated.

To add a partner account to a project

- 1** Navigate to the Projects screen.
- 2** Select a project.
- 3** Click the Partners view tab.
- 4** In the Partners list, add a record, and complete the necessary fields.

Some of the fields in a Partners record are described in the following table.

Field	Comments
Account Type	The choices in this drop-down list are configured by using the ACCOUNT_TYPE type in the List of Values.
Role	The choices in this drop-down list are configured by using the PROJECT_PARTNER_ROLE type in the List of Values.
Site	This is the account site, a unique identifier for the account. It is not related to the sites where clinical trials are carried out.

Adding Activities and Tasks to a Project

Activities can be added to the project in a variety of ways:

- Enter activities in the Activities view.
- Generate activities in the Activity Plan view by applying a project activity template. (See [“To add an activity to a project using a project activity template” on page 380.](#))
- Enter activities manually in the Activity Plan view. These activities must be associated with an activity plan based on a template.
- Create a task in the Task view and associate activities with the task. (See [“To create a task and associate activities to it” on page 381.](#))
- Import activities from a Microsoft Project file (See [“About Exchanging Project Data with Microsoft Project” on page 384.](#))

A task is a container for activities. Activities associated with tasks are different from regular *standalone* activities. Activities that belong to tasks cannot be generated by project activity templates. They can only be created manually from within the Project Task Activity view. A standalone activity cannot be added to a task, nor can a task activity be disassociated from the task.

Activities imported from Microsoft Project can be either standalone activities or task activities, depending upon how the mapping template has been set up.

For more information, see about creating activities and tasks for projects management in *Siebel Professional Services Automation Guide*.

To add an activity to a project using a project activity template

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project with which the activities will be associated.
- 3 Click the Activity Plans view tab.
- 4 In the Activity Plans list, add a record.

- 5 In the Template field, select a template from the drop-down list.

The activities associated with the activity plan appear in the Activities list subview.

NOTE: Activities can also be added manually to the Activities view.

To create a task and associate activities to it

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project with which the tasks will be associated.
- 3 Click the Tasks view tab.
- 4 In the Tasks list, add a record, and complete the necessary fields.
- 5 In the Tasks list, drill down on the Name hyperlink.
- 6 In the Activities list, add a record, and complete the necessary fields.

Monitoring Project Costs

The Cost view provides the end user with a valuable summary of all costs associated with a particular project and protocol.

The cost items are displayed in three lists:

- **Project Activities.** Displays those activities from the Activities view where the Cost field is selected.
- **Project Tasks.** Displays those tasks from the Tasks view where the Cost field for the *task* is selected. The actual cost and budgeted cost for a task are determined by summing the costs of the activities contained in the task.
- **Clinical Payments.** Displays payments made to the sites associated with the protocol. These payment amounts are rolled up into the actual cost field in the Project form.

End users cannot add, modify, or delete records in this view.

NOTE: All costs in this view are in the default currency set for the project.

To view costs associated with a project

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project for which you want to view costs.
- 3 Click the Costs view tab.
- 4 Click a hyperlink in the Clinical Payments or Project Tasks list to see the activities associated with a cost item.

Managing Risk

An important aspect of project management is risk management. The features of the Risks view allow the end user to enter information about project risks and create and assign resolution activities to address the risks.

For more information, about assessing risks for projects management, see *Siebel Professional Services Automation Guide*.

To add a risk and resolution activities to a project

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project to which the risks will be associated.
- 3 Click the Risks view tab.

- 4** In the Risks list, add a record, and complete the necessary fields.

Some of the fields in a Risks record are described in the following table.

Field	Comments
Priority	The choices in this drop-down list are configured by using the PS_RISK_PRIORITY type in the List of Values.
Severity	The choices in this drop-down list are configured by using the PS_RISK_SEVERITY type in the List of Values.
Type	The choices in this drop-down list are configured by using the PS_RISK_TYPE type in the List of Values.

- 5** In the Risks list, drill down on the Name hyperlink.

- 6** In the Resolution Activities list, add a record, and complete the necessary fields.

Some of the fields in a Resolution Activities record are described in the following table.

Field	Comments
Priority	The choices in this drop-down list are configured by using the ACTIVITY_PRIORITY type in the List of Values.
Status	The choices in this drop-down list are configured by using the EVENT_STATUS type in the List of Values.
Type	The choices in this drop-down list are configured by using the type in the TODO_TYPE List of Values.

About Exchanging Project Data with Microsoft Project

Resource, task, and summary task information from Microsoft Project data can be exchanged with Siebel eClinical Project. Some standard mapping templates are provided with Siebel eClinical, and the administrator can create additional mapping templates (see [“Mapping Siebel Project Fields to Microsoft Project Fields” on page 372](#)).

Table 16 shows how features in Siebel eClinical Project map to features in Microsoft Project.

Table 16. Mapping Between Siebel eClinical Project and Microsoft Project

Siebel eClinical Project	Microsoft Project
Roles in the Team Workbook view	Resources
Activities in the Activities view, or Tasks in the Tasks view	Summary Tasks
Activities in the Activities view, or Tasks in the Tasks view	Tasks

CAUTION: Microsoft Project dependencies are not exchanged. To maintain dependencies in your Microsoft Project file, do not export your project from Siebel eClinical to Microsoft Project.

Export filters can be applied to restrict data exported from Siebel eClinical to Microsoft Project.

For information about Microsoft Project integration and how to exchange data between an MPP file and a Siebel eClinical project, see *Siebel Professional Services Automation Guide*.

Managing Products 18

Consistent product and price list information allows your company to sell its products. This chapter describes how to manage product information and pricing structures by setting up and defining products, product lines, product features, and price lists.

Using the procedures given in this chapter, you will be able to perform the administrator tasks of defining products (both internal and external) and entering information about promotional items, competitive products, markets (therapeutic classes), and compounds under clinical trial. End users use the Products views to view product information and enter product change requests.

For more information on the differences between administrator and end-user tasks, see [“Business Scenario” on page 387](#).

How Siebel Life Sciences Stores Product Information

Siebel Life Sciences provides two different tables for storing product information:

- An internal product table (S_PROD_INT)
- An external product table (S_PROD_EXT)

These tables supply data used in various chart views, such as those in the Analysis screen.

About the Internal Product Table

The internal product table (S_PROD_INT) is used primarily for proprietary product data, including products that are detailed or distributed as samples or promotional items by sales representatives. The administrator can categorize products according to product level, therapeutic class, and product type as well as define market categories, such as an antibiotics market. For more information on entering products in the internal product table, see [“Defining Internal Products” on page 391](#).

NOTE: After you enter a product into the internal product table, you cannot delete it. However, you can prevent it from appearing in drop-down lists and dialog boxes by making it inactive. For more information, see the procedure [“To make a product inactive” on page 397](#).

About the External Product Table

The external product table (S_PROD_EXT) is used for syndicated data from content providers, and for any additional data the administrator chooses to enter about competitive or complementary products. Check with your content provider for information on the product identifiers they use. For more information on loading syndicated data, see [Chapter 19, “Importing Data.”](#)

Products entered in the external product table can also be entered in the internal product table. However, for any product that is entered in both tables, make sure that the product name and other product identifiers match exactly in both tables.

For more information on entering products in the external product table, see [“Defining External Products” on page 389](#).

Business Scenario

This section outlines an example workflow performed by a Siebel Products administrator and end users. Your company may follow a different workflow according to its business requirements.

A pharmaceutical company has a new product to bring to market. To make the new product available to sales representatives in the field, the administrator defines the new product within the system, adds a price list, and then associates the new product with the price list. Finally, he adds new background information (called decision issues) that the Home Office wants to communicate to the field. Sales representatives use Siebel Products to view product information and enter change requests.

Example Workflow for Managing Products

This section details sample tasks often performed by administrators and end-users when managing products. In this scenario, the administrator is responsible for setting up Siebel Products so that end users can view product information. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to set up product information:

- **Add a new product (called an internal product) to Siebel Products.** For more information, see [“Defining Internal Products” on page 391](#).
- **Define product features and set up any product literature.** Administrators enter additional product details including key features, information on related products, product comparison data, and associate literature. For more information, see [“Specifying Additional Product Information” on page 398](#).
- **Add any competitive and complementary products (called external products) to Siebel Products.** For more information, see [“Defining External Products” on page 389](#).
- **Add products to catalogs.** For more information, see [“Adding Products to Catalogs” on page 406](#).
- **Define a price list and then associate it with the new product.** For more information, see [“Defining Price Lists” on page 400](#).
- **Define decision issues.** For more information, see [“Defining Decision Issues” on page 405](#).

End-User Procedures

The following list shows tasks end users typically perform when viewing product information:

- **View product information.** For more information, see [“Viewing Product Information” on page 407](#)
- **Enter product change requests.** For more information, see [“Adding a Product Change Request” on page 408](#).

Administrator Procedures

The following administrator procedures are described in this section:

- [To add an external product on page 390](#)
- [To add an internal product or a market on page 395](#)
- [To make a product inactive on page 397](#)
- [To specify additional product features on page 398](#)
- [To add information on related products on page 398](#)
- [To associate related literature on page 398](#)
- [To add product comparison information on page 399](#)
- [To add a price list on page 400](#)
- [To associate a price list with a product on page 401](#)
- [To define company features on page 402](#)
- [To define product features on page 402](#)
- [To enter competitor comparison information on page 403](#)
- [To add a decision issue on page 405](#)
- [To add a product or lot number to a catalog on page 406](#)

Defining External Products

Use the External Products view to manage information about competitive and complementary products and to associate those products with the companies that produce them.

Siebel Life Sciences stores the information you enter in the External Products view in the external product table (S_PROD_EXT). In addition, it also displays this information in the Competitor Comparison Administration view. For more information on the internal and external product tables, see [“How Siebel Life Sciences Stores Product Information” on page 386](#).

NOTE: Make sure that the product information you specify in the External Products view matches exactly the information specified for the same product in the Products view. For more information, see [“Defining Internal Products” on page 391](#).

To add an external product

- 1 From the application-level menu, choose View > Site Map > Application Administration > External Products.
- 2 In the External Products list, add a record and complete the necessary fields.

Some of the fields in an External Products record are described in the following table.

Field	Comments
Competitor	Indicates whether or not the company specified in the Vendor field is a competitor. For more information on how to create account records, see “Specifying a Competitor” on page 187 .
Product	If the product is also entered in the internal product table, the name entered here must match the name entered in the Product Administration view. For more information, see “Defining Internal Products” on page 391 .
Product Type	Specifies whether the product is competitive or complementary.
Vendor	The manufacturer of this product.

Defining Internal Products

Use the Product Administration view to enter and update information about your company's internal products, promotional items, competitive products, markets (therapeutic classes), and compounds under clinical trial. Siebel Life Sciences stores the information entered in this view in the internal product table (S_PROD_INT). For more information, see [“How Siebel Life Sciences Stores Product Information” on page 386](#).

To create a new internal product, you create a new record in the Product Administration view. In creating a new internal product you specify:

- **Product categorization settings.** Use the values described in [Table 17](#) to categorize new products, or create market (therapeutic class) records.
- **Samples and promotional items settings.** Use the values described in [Table 18 on page 393](#) to define samples and promotional items.

NOTE: If you plan on tracking your samples inventory or samples disbursements using lot numbers, create lot numbers for samples. For more information, see [“Defining Lot Numbers” on page 148](#).

Product Categorization Settings

You categorize products or create market (therapeutic class) records using the Product Administration field values described in [Table 17](#).

Table 17. Recommended Product Categorization Settings

Record Type	Product Level Field	Type Field	Inventory Field	Orderable Field	Sales Product Field	Sales Service Field
Market (therapeutic class)	1	Market	Null	Null	Null	Null
Detailed product. Product associated with call details, meetings, formularies, objectives, or opportunities	2	Detail	Null	Null	Selected	Null

Table 17. Recommended Product Categorization Settings

Record Type	Product Level Field	Type Field	Inventory Field	Orderable Field	Sales Product Field	Sales Service Field
Competitive product. For more information, see “About the External Product Table” on page 386.	2	Competitor	Null	Null	Null	Null
Sample products disbursed on contact calls or account calls *	3	Sample	Null if tracking by lot number Selected if tracking by product name	Selected	Selected	Null
Promotional item disbursed on contact calls or account calls *	5	Promotional Item	Selected (if desired)	Selected	Null	Null
Equipment, medical, or surgical devices	Null	Null	Null	Selected	Selected	Null
Services	Null	Null	Null	Selected	Selected	Selected
Product configuration models	Null	Null	Null	Selected	Selected	Null
Product available for clinical trial	Null	Compound	Selected (if desired)	Null	Null	Null

* If the product will be tracked by lot number, you must specify additional settings, as described in [“About Samples and Promotional Items Settings” on page 392.](#)

About Samples and Promotional Items Settings

FDA regulations stipulate that samples disbursements must be tracked by lot number. However, it is not required that the actual samples inventory be tracked by lot number. Using [Table 18 on page 393](#):

- Locate a product type and description that matches the product you are creating.

- Configure the Inventory, Lot # Tracking, and Inventory by Lot fields using the values described in the last three columns.

For more information on defining lot numbers, see [“Defining Lot Numbers” on page 148](#).

Table 18. Sample and Promotional Items Settings

Product Type	Description	Inventory Field (Product Administration View)	Lot # Tracking Field (Product Administration View)	Inventory by Lot Field (Lot Setup View)
Samples	Full tracking by lot number: <ul style="list-style-type: none"> ■ Samples disbursements tracked by lot number ■ Samples inventory tracked by lot number No tracking by product name.	Null	Selected	Selected
Samples	Partial tracking by lot number: <ul style="list-style-type: none"> ■ Samples disbursements tracked by lot number ■ Samples inventory not tracked by lot number No tracking by product name.	Null	Selected	Null
Samples	Full tracking by product name: <ul style="list-style-type: none"> ■ Samples disbursements tracked by product name ■ Samples inventory tracked by product name No lot number tracking.	Selected	Null	Null
Samples	Partial tracking by product name: <ul style="list-style-type: none"> ■ Samples disbursements tracked by product name ■ Samples inventory not tracked by product name No lot number tracking.	Null	Null	Null

Table 18. Sample and Promotional Items Settings

Product Type	Description	Inventory Field (Product Administration View)	Lot # Tracking Field (Product Administration View)	Inventory by Lot Field (Lot Setup View)
Promotional-items	Full tracking by product name: <ul style="list-style-type: none">■ Promotional-items disbursements tracked by product name■ Promotional-items inventory tracked by product name	Selected	Null	Null
Promotional-items	Partial tracking by product name: <ul style="list-style-type: none">■ Promotional-items disbursements tracked by product name■ Promotional-items inventory not tracked by product name	Null	Null	Null

To add an internal product or a market

- 1** From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2** In the Products list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	<p>The name of the product, promotional item, or market (therapeutic class).</p> <p>If this product also exists in the external product table, this name must match the product name in the External Product Administration view. For more information, see “Defining External Products” on page 389.</p> <p>If this product will be tracked in inventory, either by product name or by lot number, include both the product name and the dosage (for example, Axis 2mg).</p>
Part #	<p>The part number of this product. If a product image will be displayed on a Web site created with Siebel Life Sciences portals, do not include spaces or special characters in the part number.</p>
Type	<p>The type of product being added. For the recommended settings, see Table 17 on page 391.</p> <p>If this product also exists in the external product table, select Competitor so that the products will match up correctly.</p>

- 3 In the More Info form, click the show more button and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Lot # Tracking	<p>Applies only to products that will be disbursed as samples. Select this field if the product will be tracked by lot number, either for purposes of disbursement tracking or for inventory tracking. If you select this field:</p> <ul style="list-style-type: none">■ You must define lot numbers for the product as described in Table 18 on page 393. For more information on defining lot numbers, see “Defining Lot Numbers” on page 148.■ You should <i>not</i> check the Inventory field. This field is read-only if the Samples Lots Enabled system preference is set to FALSE.
Inventory	<p>Applies to products that will be tracked in inventory by product name rather than by lot number. If you check this field, you should <i>not</i> check the Lot # Tracking field.</p> <p>For more information, see Table 17 on page 391 and then Table 18 on page 393.</p>
Orderable	<p>Select this field for any product or service that may be included in a samples order or in a sales order. For more information, see Table 17 on page 391.</p>
Parent Product	<p>The parent product of this product within the product hierarchy. Products that will be disbursed as samples should have a parent product. A parent product may be a market (therapeutic class).</p>
Product Level	<p>Enter the appropriate value according to your product hierarchy. For the recommended setting, see Table 17 on page 391.</p> <p>If this product also exists in the external product table, enter 2 so that the products will be matched up correctly.</p>
Therapeutic Class	<p>The therapeutic class (or market) of the product. There is no functionality associated with this drop-down list. Market type (or therapeutic class) functionality is tied to the Parent Product field; a new market is added by creating a new record in the Products view and setting the Type field to Market.</p>

Field	Comments
Sales Product	Check this field (and the Orderable field) for any product or service that your company actually sells (and will therefore be included in a sales order). For more information, see Table 17 on page 391 .
UoM	Unit of measure; that is, the measure by which the product is sold or marketed.
WAC	Wholesaler average cost; that is, the average wholesale cost of the product.

For more information on specifying additional product information, see [“Specifying Additional Product Information” on page 398](#).

To make a product inactive

- 1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2 In the Products list, select the product that you want to make inactive.
- 3 In the Products form, click the show more button and clear the following fields:
 - Product Level
 - Type
 - Lot # Tracking
 - Inventory
 - Orderable
 - Sales Product

After end users synchronize with the server, they will not see the product in any drop-down list or dialog box. However, they will see the product listed in views that display products.

Specifying Additional Product Information

You can specify additional product information in the Product Administration view by selecting the product in the Products list and then making selections from the lower Show drop-down list. Using these subviews you can specify additional product features or associate product literature, other related products, and product comparison information.

To specify additional product features

- 1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2 In the Products list, select a product.
- 3 From the lower Show drop-down list, select Product Key Features.
An expanded Product form appears.
- 4 Scroll down to the Feature list, add a record, and enter a description.

To associate related literature

- 1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2 In the Products list, select a product.
- 3 From the lower Show drop-down list, select Product Literature.
- 4 Scroll down to the Product Literature list and add a record.
- 5 In the Add Literature dialog box, select one or more records and click OK.
The selected records are added to the Literature list.

Repeat [Step 4](#) and [Step 5](#) to add other related literature. For more information on adding other selections to the Add Literature dialog box, see the chapter on literature administration in *Applications Administration Guide*.

To add information on related products

- 1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.

- 2** In the Products list, select a product.
- 3** From the lower Show drop-down list, select Related Products.
- 4** Scroll down to the Related Products list and add a record.
- 5** In the Add Internal Products dialog box, select one or more products and click OK.

Repeat [Step 4](#) and [Step 5](#) to add other related products. For more information on adding on other selections to the Add Internal Products dialog box, see [To add an internal product or a market on page 395](#).

To add product comparison information

- 1** From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2** In the Products list, select a product.
- 3** From the lower Show drop-down list, select Product Comparison.
- 4** Scroll down to the Product Comparison list and add a record.
- 5** In the Add Product Comparisons dialog box, select one or more products and click OK.

The products are added to the Product Comparison list.

Repeat [Step 4](#) and [Step 5](#) to add other related products to the Related Products list.

Defining Price Lists

You can use the Price List views to create and maintain an unlimited number of price lists for your products. Using these views, you can:

- Add and update price lists
- Define and update price list names and descriptions
- Create new records based on existing price lists
- Associate products with price lists
- Enter pricing information (such as effective date, terms, and shipping information)

To add a price list

- 1** From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
- 2** In the Price Lists, More Info form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Currency	The currency for this price list. The values that appear in the Pick Currency Code dialog box are defined in the Application Administration, Currency view.
Name	The name for the price list.
Payment Terms	The payment terms of the price list. The values that appear in the Pick Payment Terms dialog box are defined in the Application Administration, Payment Term view.
Shipping Method	The shipping method for products associated with this price list. The values that appear in the Shipping Method drop-down list are defined in the list of values for FS_CARRIER.
Shipping Terms	The shipping terms for products associated with this price list. The values that appear in the Freight Terms drop-down list are defined in the list of values for FREIGHT_TERMS.

- 3 Click the Price List Line Items view tab.
- 4 In the Price List Line Items list, add a record and complete the necessary fields.

The products that appear in the Name field and the Add Internal Products dialog box are defined in the Product Administration view. For more information, see [“Defining Internal Products” on page 391](#).

To associate a price list with a product

- 1 From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
- 2 In the Products list, select a product.
- 3 From the lower Show drop-down list, select Price Lists.
- 4 Scroll down to the Product List list and add a record.
- 5 In the Add Price Lists dialog box, select one or more price lists and click OK.

The price lists are added to the Price Lists list.

Repeat [Step 4](#) and [Step 5](#) to associate other products with the appropriate price lists. For more information on adding other selections to the Add Price Lists dialog box, see [“To add a price list” on page 400](#).

NOTE: You can also associate images with products so that the images appear in the Products. For more information, see the chapter on basic product administration in *Product Administration Guide*.

Managing Competitor Information

Effective sales and marketing requires that your company have up-to-date and consistent information about the competitive landscape. This section describes how to administer information about competitors and competitive products.

Tracking competitor information in Siebel Life Sciences involves the following steps:

- Adding account records for competitors and selecting the Competitor field. For more information, see [“Specifying a Competitor” on page 187](#).
- Adding records for competitors’ products. For more information, see [“Defining External Products” on page 389](#).
- Adding comparative and competitive literature files to the application. For more information, see the chapter on literature administration in *Applications Administration Guide*.

To administer competitor information you must:

- Define company features and product features that can be used to compare your company and its products with those of your competitors. For more information, see the procedures [“To define company features” on page 402](#) and [“To define product features” on page 402](#).
- Enter information about competitive products, product and company comparisons, and competitive and comparative literature. For more information, see the procedure [“To enter competitor comparison information” on page 403](#).

To define company features

- 1** From the application-level menu, choose View > Site Map > Data Administration > Company Features.
- 2** In the Company Features list, add a record and complete the necessary fields.

Repeat [Step 2](#) to define additional company features.

To define product features

- 1** From the application-level menu, choose View > Site Map > Product Features Administration > Product Features Administration.

- 2** In the Product Feature list, add a record and complete the necessary fields.

Some of the fields in a Product Features record are described in the following table.

Field	Comments
Feature	The product comparison criterion; for example, Once a Day Formulation.
Description	A description of the feature, if necessary.

To enter competitor comparison information

- 1** From the application-level menu, choose View > Site Map > Data Administration > Competitor.

The Competitors list appears.

This list displays every account flagged as a competitor. Note that the Competitor Flag field is checked for every record. For more information on adding competitors, see [“Specifying a Competitor” on page 187](#).

- 2** In the Competitors list:
 - Select a competitor.
 - Optionally, enter the competitor’s World Wide Web address (URL) in the Home Page field.
- 3** Click the Competitor Comparisons view tab.

- 4 In the Competitor Comparisons list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Feature	The features listed in the Add Competitive Company Features dialog box are defined in the Company Feature Administration view. For more information on adding company features, see “To define company features” on page 402.
Rank	Enter the numeric rank of the feature as defined by your business process.

- 5 Optional: Click the Competing Product Comparison view tab, add a record, and complete the necessary fields.
- 6 Optional: Click the Literature view tab:
 - Add a record in the Competitor’s Literature list and complete the necessary fields.
 - Add a record in the Comparative Literature list and complete the necessary fields.
- 7 Optional: Click the Product Literature view tab, add a record in the Product Literature list, and complete the necessary fields.
- 8 Optional: Click the Product Literature view tab and select a product in the Product Literature list:
 - In the Competitor’s Product Literature list, add a record and complete the necessary fields.
 - In the Comparative Product Literature list, add a record and complete the necessary fields.

For information on these fields, see the chapter on literature administration in *Applications Administration Guide*.

Defining Decision Issues

Contacts often raise important issues during a call. Decision issues are the objections a contact may raise when evaluating a product prior to making a prescribing decision. Often these objections are related to the efficacy of the product, its pharmacological properties, the recommended dosage, its safety profile, drug interactions, competitor's claims, product availability, price and generic substitution.

Using the Data Administration, Decision Issues view, you can:

- Add and edit decision issues within the application
- Enter explanations about specific decision issues and provide instructions to representatives in the field on how to discuss them
- Associate literature and related issues with decision issues

Sales representatives can then use this information to prepare for calls on contacts and accounts. They can also associate decision issues with particular calls, indicating which issues are of concern to particular contacts.

NOTE: Before you can use the procedures described in this section, you must first add product literature as described in *Applications Administration Guide*.

To add a decision issue

- 1** From the application-level menu, choose View > Site Map > Data Administration > Decision Issues.
- 2** In the More Info form, add a record and complete the necessary fields.
- 3** To specify another related issue, click the Related Issues view tab.
- 4** In the Related Issues list, add a record.
The Add Related Issues dialog box appears.
- 5** Select one or more issues and click OK.
The application adds the selected issues to the Related Issues list.

- 6** From the application-level menu, choose View > Site Map > Catalog Administration > Categories.
- 7** Select a category to which you want to assign a decision.
- 8** Click the Decision Issues tab view.
- 9** Add new records to associate decision issues to categories.

For more information on adding literature and attachments to decision issues, see *Applications Administration Guide*.

Adding Products to Catalogs

Products are added to categories within a catalog. Starting with Siebel Life Sciences version 7.0.3, products—including samples and promotional items—and lot numbers need to be associated with catalogs to determine drop-down list visibility. Access groups are assigned to a catalog to control visibility to users. For more information about access groups, see *Security Guide for Siebel eBusiness Applications*.

To add a product or lot number to a catalog

- 1** From the application-level menu, choose View > Site Map > Catalog Administration.
- 2** Add a record and complete the necessary fields.
- 3** Drill down on the hyperlink in the Name field.
- 4** In the Categories list add a record.
- 5** Use the buttons on the Categories list to create subcategories.
- 6** Click the Products view tab.
- 7** Add a record to the products list for each product or lot number you want to add to the category.

End-User Procedures

The following end-user procedures are described in this section:

- [To view product information](#)
- [To add a product change request record on page 408](#)

NOTE: Your responsibilities determine whether you have access to the All Products view or the All Products across Organizations view. The procedures that reference the All Products view can also be performed using the All Products across Organizations view. The view you select sets the context for the content within the view.

Viewing Product Information

The views in the Products screen allow end users to view lists of products and obtain information such as prices, key features, and product defects. The Siebel administrator is responsible for entering information on products, product issues, price lists, and other information displayed in the Products views. For more information, see [“Administrator Procedures” on page 389](#).

To view product information

- 1 Navigate to the Products screen.
- 2 From the Show drop-down list, select All Products.
- 3 In the Products list, select a product.
- 4 Click a view tab.

NOTE: To view hidden view tabs, scroll to the right.

Adding a Product Change Request

End users who receive information about a product change request that has not already been entered in the system, can add a product change request.

To add a product change request record

- 1** Navigate to the Products screen.
- 2** From the Show drop-down list, select All Products.
- 3** In the Products list, select a product.
- 4** Click the Change Requests view tab.
- 5** In the Change Requests list, add a record.
- 6** In the Add Change Request dialog box, click New.

The application adds a new record to the Change Requests list.

- 7** In the Change Requests list:
 - Enter a description in the Summary field.
 - Select the type of request in the Type field.
 - Drill down on the Change Request hyperlink.

The Change Request form appears.

- 8** In the Change Request form, complete the necessary fields.

To return to the Product Change Request list, click the back button to the right of History.

In this chapter, you will learn how to import data into your Siebel Life Sciences database.

About Data

There are two general categories of data: proprietary data and syndicated data. These two types of data possess different characteristics and should generally be loaded into Siebel base tables using different processes.

NOTE: Loading data directly into Siebel base tables is not supported. Because of the complexity of table relationships and Mobile Web Client requirements, and the risk of loss of data integrity, Siebel Enterprise Integration Manager (EIM) must be used to import data into Siebel base tables. Do not attempt to modify data directly in the physical tables.

- **Proprietary data.** This is data that resides in an existing database and must be imported into the Siebel Life Sciences database during initial implementation or on an ongoing basis.

For proprietary data, Siebel eBusiness Application Integration (eAI) is used. Siebel Enterprise Integration Manager, one method of eAI, is a subsystem in the Siebel Life Sciences software that manages the exchange of data between Siebel Life Sciences database tables and other corporate databases. It includes a number of data integrity features, such as generation of foreign-key references and case adjustment.

- **Syndicated data.** This is read-only data about sales, Rx, and profitability that is provided periodically by third-party vendors. Once delivered, this data must be loaded into the Siebel Life Sciences database and made available to users in a timely fashion. Although you can use Siebel EIM (with transaction logging turned off) to import syndicated data, direct loading with a database utility (such as SQL* Loader) is faster for importing the large volumes of syndicated data typically loaded by pharmaceutical companies.

The Siebel Life Sciences views and business components that require data import, and the data values for those views, are shown in [Table 22 on page 433](#).

Business Scenario

This scenario is an example of the tasks performed by the database administrator, the application administrator, and the sales representatives. Your company may follow a different sequence according to its business requirements.

The database administrator (DBA) transfers company data into the Siebel Life Sciences interface data tables. The Siebel EIM transfers the data to the Siebel Life Sciences base tables.

Later, the DBA receives syndicated data from a data provider (for example, IMS Health) and transfers this data to a staging table.

The application administrator uses administrative views to map EIM_SYND_DATA fields to S_SYND_DATA, to load the data from the staging table into the application base tables.

After loading a syndicated data update, the application administrator extracts portions of the data according to territory assignment and sends a compressed version of the data extracts to mobile users in the field.

The sales representatives download the data extracts and import them into their local databases. Using the imported data in the Analysis views, they can evaluate their performance and determine where to focus their sales activities.

Administrator Procedures

This section provides instructions for the following tasks for database and application administrators. The tasks are usually performed in the following order:

- 1 Import data using Siebel EIM
- 2 Import syndicated data
- 3 Extract syndicated data
- 4 Route the imported data to users

Importing Data with Siebel EIM

Siebel EIM manages the exchange of data between Siebel database tables and other corporate databases. This section provides information specific to Siebel Life Sciences and supersedes information in *Siebel Enterprise Integration Manager Administration Guide*. For general information on Siebel EIM, read *Siebel Enterprise Integration Manager Administration Guide*.

Stages of the Data Import Process

The data import process with Siebel EIM uses two stages, as shown in [Figure 12 on page 413](#).

- 1 The data is first copied from external data tapes (or other provided media) into the interface tables for the Siebel Industry Application (SIA), using a native database data-loading utility (such as SQL* Loader).

For information about the interface tables and their relationships to base tables in the Siebel application database, read [“Data and Related Interface Tables” on page 415](#). For further details on Siebel Industry Application interface tables, such as the contents of each table, read *Interface Tables Reference for Siebel Industry Applications*.

- Using EIM, you transfer the data from the interface tables to predefined destination columns in the base tables of the Siebel Life Sciences database. The EIM process uses a configuration file (`default.ifb`).

For general information about `default.ifb` and instructions on using Siebel EIM, read *Siebel Enterprise Integration Manager Administration Guide*.

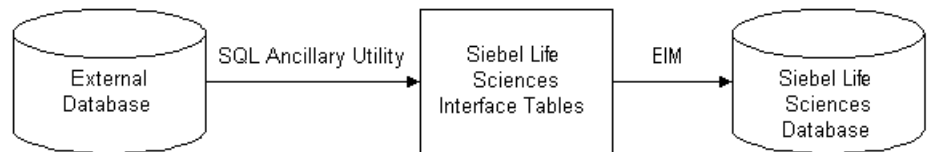


Figure 12. Process Flow From an External Database to the SIA Database

Recommended Import Order

To correctly establish the relationships between dependent data elements, the data should be imported in the order recommended below. In general, reference data such as therapeutic classes, competitive metrics, and competitive issues should be imported first, followed by employee and product data (internal products, external products, and medical specialties), followed by contacts data. Syndicated data should be loaded last.

The following list shows the recommended import order for all data types specific to Siebel Life Sciences.

- Reference data (therapeutic classes, competitive metrics, and so on)
- Employees
- Broadcast messages
- Products (both internal and external)
- Leads
- Medical specialties
- Insurance plans
- Accounts

- 9** Opportunities
- 10** Formularies
- 11** Contacts
- 12** Contact ratings and rankings
- 13** Quotes
- 14** Documents
- 15** Proposal templates
- 16** Forecasts
- 17** Fulfillment data
- 18** Call lists
- 19** Objectives
- 20** Marketing campaigns
- 21** Product consumption
- 22** Service requests
- 23** Product defects
- 24** Activities and appointments
- 25** Notes
- 26** File attachments
- 27** Syndicated data

Data and Related Interface Tables

The process for importing syndicated data takes advantage of the fact that syndicated data is read-only. Because the row ID on the S_SYND_DATA table is never referred to anywhere else in the Siebel data model, it can be populated with dummy values that differ from usual row IDs. The application administrator uses SQL *Loader to populate the ID field with a unique sequential value, a process which provides either full or partial table-level extraction. Using views in the Syndicated Data Administration screen, you can define complex routing rules for syndicated data.

Table 19 shows the relationships between the data, interface tables, and base tables.

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Account Details	EIM_ACCNT_DTL	S_ORG_EXT	Organization
		S_ORG_EXT_LSX	1:1 Extension table for Account Types
		S_ORG_EXT_X	1:1 Account Best Times to Visit
Activities	EIM_ACTIVITY	S_EVT_ACT	Activities
		S_EVT_ACT	Activities Only User Key
	EIM_ACTIVITY2	S_ACT_SIGN	Signatures
		S_EVT_ACT	Activities Only User Key
		S_ACT_PRDINT	Activity Products
		S_ACT_ISS	Activity Issues
		S_ACT_PROD_ISS	Issues for Activity Products
Addresses	EIM_ADDR_ORG	S_ADDR_ORG	Account Addresses including Bricks

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Agreements and Contracts	EIM_AGREEMENT	S_DOC_AGREE	Agreements and Contracts
	EIM_AGREE_LS	S_DOC_AGREE	Contracts
		S_AGREE_PAY	Contract Payments
	EIM_ENTLMNT	S_ENTLMNT	Entitlements and Contract Price Group
		S_ENTLMNT_ITEM	Price Group Products
		S_ENTLMNT_FEE	Nonproduct Fees
		S_ENTLMNT_ITEM_FEE	Product Fee Price Group
Brick	EIM_AREA_LS	S_AREA_LS	Bricks
Chat and Discussions	EIM_DISCN_LS	S_TOPIC_LS	Chat/Discussion Topics
		S_TOPIC_CON_LS	Chat User Registration
		S_MESG_BRD_LS	Message Board

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Clinical	EIM_CL_ACT_LS	S_EVT_ACT	Clinical Activity Columns
	EIM_CL_DSGN_LS	S_CL_DSGN_LS	Clinical Designs
	EIM_CL_PGM_LS	S_CL_PGM_LS	Clinical Programs
		S_CL_PGM_ATT_LS	Clinical Program Attachments
		S_CL_PGM_APP_LS	Clinical Program Applications
	EIM_CL_PTCL_LS	S_CL_PTCL_LS	Clinical Protocols
		S_CL_PTCL_LSXM	1:M Protocol Extension Table
		S_CL_PTL_ATT_LS	Clinical Protocol Attachments
		S_CL_PTL_POS_LS	Clinical Protocol Positions
		S_CPTCL_DSGN_LS	Clinical Protocol Designs
	EIM_CL_SUBJ_LS	S_CL_SUBJ_LS	Clinical Subjects
		S_CL_SUBJ_ST_LS	Clinical Subject Status
		S_CL_SJ_CSNT_LS	Clinical Subject Consent
		S_CL_SBJ_ATT_LS	Clinical Subject Attachments
	EIM_PTL_SITE_LS	S_PTCL_SITE_LS	Clinical Protocol Sites
		S_PTL_ST_POS_LS	Clinical Protocol Site Positions
		S_PTL_ST_ATT_LS	Clinical Protocol Site Attachments
		S_PTL_ST_CON_LS	Clinical Protocol Site Contacts
		S_PS_STMPVER_LS	Clinical Protocol Site Template Versions
		S_CL_ACT_EXC_LS	Clinical Protocol Site Activity Exceptions
		S_CL_PYMNT_LS	Clinical Payments
	EIM_SBJ_TMPL_LS	S_SUBJ_TMPL_LS	Subject Templates
		S_SBJTMP_VER_LS	Subject Template Versions
	EIM_TMPL_PLNITM	S_TMPL_PLAN_ITEM	Subject Template Visits

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Companies	EIM_ACCOUNT	S_ORG_EXT	Organization
		S_ACCNT_POSTN	Position for Account
		S_ADDR_ORG	Account Addresses
		S_ORG_REL	Account Affiliations
	EIM_ACCOUNT1	S_ORG_EXT	Organization Only User Key
		S_ACCNT_CLS_RNK	Account Ratings and Rankings
		S_ACCNT_MED_PROC	Account Medical Procedures
		S_ACCNT_MED_SPEC	Account Medical Specialties
Contacts	EIM_CONTACT	S_CONTACT	Contacts
		S_ADDR_PER	Contact Addresses
		S_CONTACT_REL	Contact Affiliations
		S_PER_ORG_UNIT	Contact to Account Affiliations and Roles
		S_STATE_LIC_LS	Contact State Licenses
	EIM_CONTACT1	S_CONTACT	Contacts Only User Key
		S_POSTN_CON	Contact Positions
		S_CON_ADDR	Contact Address Usage
	EIM_CON_DTL	S_CONTACT	Contacts Only User Key
		S_CONTACT_LSX	1:1 Contacts Extension Table
		S_CONTACT_LSXM	1:M Contacts Extension Table
	Formularies	EIM_FRMULRY_LS	S_FORMULARY
S_FRMULRY_PROD			Formulary Products
Industry	EIM_INDUSTRY	S_INDUST	Account and Contact Types
Insurance Plans	EIM_INS_PLAN_LS	S_INS_PLAN	Insurance Plans

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Medical Education	EIM_ME_EVT_LS	S_ME_EVT_LS	MedEd Events
		S_ME_EVT_POS_LS	MedEd Event Positions
		S_ME_EVT_PRD_LS	MedEd Event Products
		S_ME_EVT_INV_LS	MedEd Event Invitees
	EIM_ME_PLN_LS	S_ME_PLN_LS	MedEd Plans
		S_ME_PLN_MDF_LS	MedEd Plan Funds
		S_ME_PLN_PRD_LS	MedEd Plan Products
	EIM_ME_SES_LS	S_ME_SES_LS	MedEd Sessions
		S_ME_SES_PRD_LS	MedEd Session Products
		S_ME_SES_INV_LS	MedEd Session Invitees
		S_ME_SES_LIT_LS	MedEd Session Literature
		S_ME_SES_MAT_LS	MedEd Session Materials
	Medical Procedures	EIM_PROC_LS	S_MED_PROC
Medical Specialties	EIM_SPEC_LS	S_MED_SPEC	Medical Specialties
Objectives	EIM_ACCT_SRC	S_ACCNT_SRC	Target Accounts for Objectives
		S_CONTACT	Contacts Only User Key
	EIM_CONTACT2	S_CAMP_CON	Target Contacts for Objective
		S_SRC	Objectives
Products	EIM_PROD_INT	S_PROD_INT	Products-Details, Samples, Markets, Lots, and Promotional Items
		S_PROD_INT1	Products
		S_PROD_POSTN	Personal Product List
	EIM_PROD_INT1	S_PROD_REL	Product Relations

Table 19. Data and Related Interface Tables

Data	Interface Table	Base Table	Table Description
Samples	EIM_SAMPLE_LS	S_SAMPLE_TXN	Sample Transactions
		S_MPL_TXN_ITEM	Sample Transaction Item
	EIM_POSITION	S_POSTN	Positions
		S_STOCK_POSTN	Stock Inventory by Position
		S_STOCK_PERIOD	Stock Period
Signature Disclaimers	EIM_SIGNDIC_LS	S_SIGN_DISC_LS	Signature Disclaimers
Syndicated Data	EIM_SYN_DATA_LS	S_SYND_DATA	Syndicated Data

For further information, see *Interface Tables Reference for Siebel Industry Applications*. That book lists the contents of each table referred to in [Table 19 on page 415](#):

- Specific data and file attachments that Siebel EIM can process.
- Names of the interface tables.
- Target base tables mapped to the interface tables.
- Any secondary tables associated with the target tables (where data from the interface tables might ultimately reside).

Importing, Extracting, and Routing Syndicated Data

The process described here for importing syndicated data takes advantage of the fact that syndicated data is read-only. Because the row ID on the S_SYND_DATA table is never referred to anywhere else in the Siebel data model, it can be populated with dummy values that differ from usual row IDs. The application administrator uses SQL*Loader to populate the ID field with a unique sequential value, a process which allows either full or partial table-level extraction. Using views in the Syndicated Data Administration screen, you can define complex routing rules for syndicated data.

NOTE: Routing rules are used by Siebel Remote and Replication Manager to determine what data and transactions are routed to mobile client databases and regional databases. For more information on routing rules, see *Siebel Remote and Replication Manager Administration Guide* and *Security Guide for Siebel eBusiness Applications*.

The views that require syndicated data import are shown in [Table 22 on page 433](#).

The general steps for loading syndicated data and distributing it to mobile users are:

- 1** Load the data into the base tables of the Siebel Life Sciences database.
If you choose to use EIM to load the data, turn off transaction logging.
- 2** Extract the data required by mobile users.
- 3** Transfer the extracted data files to mobile users.

Loading Data into the Siebel Life Sciences Database

Before you can view syndicated data in Siebel Applications, you must first populate the foreign keys fields in the S_SYND_DATA table. These keys are populated from the sales representative (POSITION_ID), territory (TERR_ID), product group (MARKET_ID), product (PROD_ID), contact (CON_ID), area (AREA_ID), and period (PERIOD_ID) fields. Each of these is a key to a record in another Siebel application table. Therefore, these fields need to be populated with valid row IDs for the corresponding position, territory, product group, product, and period business components.

To load syndicated data, the application must have the row IDs for the foreign key data that is stored in the S_SYND_DATA table. The data files used to load syndicated data are supplied in a format in which any key information is supplied as a textual description. This means that unless EIM is used to load the data, the textual descriptions need to be converted into their Siebel application table row ID equivalents.

Different data types need to be supplied to make a record visible in S_SYND_DATA. The only compulsory foreign key field is the PERIOD_ID. However, there is a unique index on the table that comprises all of the foreign key fields: S_SYND_DATA_U1. [Table 20](#) lists all of the foreign keys fields, their foreign key table, and a description of what the field contains for Siebel Life Sciences.

Table 20. Foreign Key Fields in Syndicated Data Loading

Field	Table	Description
AREA_ID	S_AREA_LS	Brick/Mini Brick Id
CON_ID	S_CONTACT	Contact for this sales data
MARKET_ID	S_PROD_INT	Product Group
OU_EXT_ID	S_ORG_EXT	Account
PERIOD_ID	S_PERIOD	Period
PLAN_ID	S_INS_PLAN	Plan
POSITION_ID	S_POSTN	Person who owns the data (for example, a sales representative)
PRDINT_ID	S_PROD_INT	Product
TERR_ID	S_ASSN_GRP	Territory

Use a native data loader (recommended method) such as SQL*Loader in Oracle or BCP in SQL Server. For the purposes of example, Oracle is used as the target database, although the technique applies equally to SQL Server. Alternatively, you can use Visual Basic and Com.

Using SQL*Loader to Load the Data

Data records in Siebel applications do not refer to the row ID field in the S_SYND_DATA table. You can insert any value in this field if it is unique in the record. Therefore, you can use a native database utility to populate this table. This method discusses the use of the Oracle SQL*Loader utility. As with the Visual Basic and COM method, using SQL*Loader requires that you resolve the foreign key references either before or after the data has been loaded into the table.

To use SQL*Loader to load the data

- 1 Resolve the foreign keys before loading.

Process the input file one line at a time and convert each foreign key value into a row ID. To save time, first load the data directly into the table as it is stored in the flat file, then update the foreign key fields using SQL statements.

- 2 Load the data file using a .ctl format file.

The following is an example of loading a data file:

```
options (rows=100)
load data
infile 'c:\myfile.txt'
badfile 'c:\myfile.bad'
append
into table S_SYND_DATA
fields terminated by ","
trailing nullcols
(ROW_ID SEQUENCE (MAX,1),
CREATED SYSDATE, CREATED_BY CONSTANT "1-0",
LAST_UPD SYSDATE, LAST_UPD_BY CONSTANT "1-0",
MODIFICATION_NUM CONSTANT 0,
CONFLICT_ID CONSTANT "0",
POSITION_ID, TERR_ID,
PERIOD_ID, DATA_SRC_CD CONSTANT "RXTer",
MARKET_ID, PRDINT_ID, ATTRIB_01)
```

- 3 Run the SQL*Loader utility from the command line using the following syntax:

```
SQLLDR73.EXE database/userid@pw control=c:\my.ct1  
log=c:\my.log
```

NOTE: The exact file name and syntax of the Loader utility is determined by the version of Oracle being used.

- 4 When the data has been loaded, resolve the foreign key references for each field. This step makes the data visible to the users, as in the following example.

```
UPDATE s_synd_data  
FROM s_period p  
SET s_synd_data.period_id=p.id  
WHERE p.name=s_synd_data.period_id ;
```

This code updates the Period field in the Syndicated Data Table to the ID of the Period rather than to the textual description of the period. You must modify and run this code for each foreign key field referred to in [Table 20 on page 422](#). The code only needs to be run for each field that you load, not for all of the fields.

Alternative Method: Using Visual Basic and COM to Load the Data

Use Visual Basic and the Siebel COM interface to retrieve the Siebel table row ID information by searching for the field that contains the text and return the ID field.

Summary Records

Sales forces are frequently hierarchically organized, with a sales representative being the lowest level of the hierarchy, rising through various managerial levels. It is possible that someone at the top of the hierarchy needs to see all of the syndicated data in the system. This may be practical if the particular user is connected to the database. However, if the managerial levels are remote users, they will have visibility on a very large number of records; their synchronization times will be extremely long.

A solution to this problem is to store summary records in the S_SYND_DATA table. Summary records are totals of the sales data for territory, region, division, and other groupings, stored with a type flag in an extension column that indicates the level of summarization is being stored. The summary records can be created by SQL scripts or with a database package such as Microsoft Access. They can be loaded using the two methods described in the previous sections.

In addition to loading summary records, you also must configure the table using Siebel Tools, to make sure that a manager-level user sees only summary records, rather than detail records, on the sales data views. Using this technique, you can also implement drill-down functionality for connected managers so that they can start at top level data and work down. For more information, see *Siebel Tools Reference*.

Extracting Data for Mobile Users

Once the data is in the database, it needs to be made visible to the users. The data is visible by position and can be viewed on many chart and analysis views in Siebel Life Sciences. This is fine for connected users, but the typical user of such data will be the sales rep or sales manager of a particular territory, who are likely to be remote users, synchronizing with the database using Siebel Remote. Therefore, the data needs to be extracted from the database.

The application administrator extracts syndicated data according to data-routing (visibility) rules that the administrator defines. When you do this, a full export-process audit trail is generated through log files. You can run multiple instances of the extraction process on each Siebel Server to maximize hardware capacity. The resulting output files are written in a compressed form and then zipped again to minimize file transfer time.

NOTE: You will need to work with Siebel Technical Services when you perform this procedure the first time.

The general steps for data extraction are:

- 1 Create a data extraction rule.
- 2 Associate the necessary nodes of mobile users with the rule.
- 3 Define the portion of the data you want to extract and specify whether any truncation or deletions should be performed on the extracted data.
- 4 Set the environment by running the siebenv.bat file at the command prompt under the Siebel Server bin directory.
- 5 Run the Syndexp.exe executable file to perform the extraction.

These general steps are detailed in the following procedures.

To create a data extraction rule

- 1 From the application-level menu, choose View > Site Map > Syndicated Data Administration > Export Rules.
- 2 Click to select the Rules list and add a record.
- 3 Complete the fields described in the following table.

Field	Comments
Name	Required. A descriptive name for the rule.
Outfile Id	Required. Enter a unique, three-character ID. This ID will be used as the name of a temporary data file created by the extraction process.
Active	If the rule is not active, it will not be processed by the extraction process.

You can create multiple rules for different types of extractions. For example, you could create one rule for Rx data and another rule for Outlet Level data. You can also extract data by multiple criteria (for example, sales force or position).

The WHERE part of a SQL SELECT statement specifies the rows of the S_SYND_DATA table that should be exported. In most cases, this WHERE clause is

```
WHERE T.POSITION_ID = [Position Id]
```

When you specify the users to extract, it will match their position ID to the position ID on the syndicated data table and extract only the data that is visible to them.

To associate nodes with an extract rule

- 1 In the Syndicated Data Export Rules view, select the correct extract rule.
If a different view is currently displayed, navigate to Data Administration > Export Rules and select the appropriate rule.
- 2 Click in the Nodes list and add a record.

- 3** Complete the fields. Some fields are described in the following table.

Field	Comments
Name	You can select multiple nodes in the Add Nodes dialog box.
Group Code	A code used for the grouping of nodes within the same extraction rule. You can specify the Group Cd value as an argument for the extraction process that is run with the Syndexp.exe executable file. With this group code, multiple Syndexp.exe processes can be run for the same extraction rule on the same Siebel Server.
Node Type Code	An attribute column for the nodes, used to identify the remote nodes. (The Syndexp.exe process services only remote nodes.)
Active	Only nodes specified as active will be processed.

To specify the data that is routed to mobile users

- 1** In the Syndicated Data Export Rules view, select the correct extract rule.

If a different view is currently displayed, navigate to Data Administration > Export Rules and select the appropriate rule.

- 2** Click in the Tables list and add a record.

- 3 Complete the fields. The fields are described in the following table.

Field	Comments
Table Name	Required. Generally, this value should be S_SYND_DATA. The exception to this general rule is if you have created an extension table or if you are using another table to store syndicated data.
Where String	<p>Enter a string that defines the data to be extracted. Generally, these strings use standard SQL WHERE statements to build the extraction scripts. In addition to using static column values and column names to specify the data to be extracted, you can use two case-sensitive variables, [Position Id] and [Employee Id].</p> <p>An example WHERE string definition that uses the Position Id variable is provided below. This example extracts data where the position ID in the syndicated data is equal to the position ID of the user.</p> <p>Example:</p> <pre>WHERE T.POSITION_ID = [Position Id]</pre> <p>A second example, provided below, extracts data for all positions assigned to an employee. Note that <TableOwner> in the example should be replaced with the appropriate Siebel database TableOwner value.</p> <p>Example:</p> <pre>WHERE EXISTS (SELECT 1 FROM <TableOwner>.S_EMP_POSTN R WHERE T.POSITION_ID = R.POSITION_ID AND R.EMP_ED = [Employee Id])</pre>
Sequence	Enter a numeric value that defines the order in which tables will be extracted.
Active	Only tables specified as active will be processed.

- 4 In the Syndicated Data Administration screen, from the Show drop-down list, select SQL Statements.
- 5 Click in the Pre SQL Statements list and add a record.

- 6 Complete the fields described in the following table.

Field	Comments
SQL Text	This SQL statement cleans up the data in the remote database in preparation for importing newer data, by deleting the existing data that will be replaced by newer data. If the entire syndicated data table will be extracted, the table should be truncated. If the latest month's data will be extracted, then the most aged month's data should be deleted.
Comments	Optional description of statement's purpose; for example, describe the portion of the data you want to extract.
Sequence	Enter a numeric value that defines the order in which SQL statements will be executed.
Active	Only statements specified as active will be processed.

You can refresh the entire syndicated data table, or you can refresh only certain specified data periods.

NOTE: Do not use the TRUNCATE TABLE function. Use the DELETE function instead.

To set the environment

- 1 In a DOS window, navigate to the *siebel_server*\BIN directory.
- 2 Run the siebenv.bat file.

CAUTION: If you do not run siebenv.bat, you may encounter the following error message: "Unable to start common api. Error in DATAExpStartApis function."

- 3 Set the environment variables.

NOTE: Syndexp.exe will not detect nodes in a clustered environment successfully unless you manually set CLUSTER_NETWORK_NAME in either siebenv.bat or syndexp.bat.

Refer to the command line arguments listed in [Table 21](#) for multiple variables that are specific to the user environment. For more information on administering data extracts, see *Siebel Remote and Replication Manager Administration Guide*.

Table 21. Command Line Arguments for Environment Variables

	Argument and Meaning	Comment
/A	Create Attachment	Default: Y
/C	ODBC Data Source	Default Environment Variable: SIEBEL_DATA_SOURCE
/D	Siebel Table Owner	Required
/E	Extract Rule Name	Required
/F	File Server Directory	Default Environment Variable: SIEBEL_FSRV_ROOT
/G	Group Code	Required
/L	Log File	Default: syndexp.log
/N	Repository Name	Default Environment Variable: SIEBEL_REPOSITORY
/P	Password	Required
/Q	Log FreQuency	Default: -1
/R	Read Consistency	Default: N
/S	Use Sequence Number	Default: N
/T	Data File Type	Default: compressed
/U	Username	Required
/V	AppServer name	Required
/X	Appserver Home Directory	Default Environment Variable: SIEBEL_HOME

To perform the data extraction

- 1 In the `siebel_server\BIN` directory, run the `Syndexp.exe` executable file.

Use the command line arguments listed in [Table 21 on page 430](#) to define multiple variables that are specific to the user environment. For example:

```
syndexp /U sadmin /P sadmin /D phdemo /E "Rule One" /C  
siebsrvr_siebel
```

NOTE: Interruption of the extraction process at any point causes the system to fail and necessitates restarting the data extraction from the beginning.

- 2 If an interruption occurs, you must go into the Pharma Node Attachment Administration view (View > Site Map > Syndicated Data Files) and delete the previously generated data files. You also must go into each node and delete the latest file that was created in the previous run.

After the program executes the Syndicated Data Loading (SDL) process, it displays the name of the user whose data is being extracted. This process continues until it has completed the extraction process for each user defined in the Syndicated Data Export Rules.

- 3 After you successfully complete the extraction process, you may want to create a batch file for use with subsequent extractions.

The extracted files are output in a compressed form to minimize file transfer time. Files are transferred using Siebel Remote, which is described in *Siebel Remote and Replication Manager Administration Guide*. After mobile users receive their extracted files, they must import the data into their local databases.

Full and Partial Data Extracts

Because syndicated data loading does not use EIM to maintain synchronization between the server and the remote databases, you must force a resynchronization step at the end of each direct load. Force resynchronization either by re-extracting an entirely new remote database for each mobile user or by performing a partial extract that includes only the refreshed syndicated data. A new, full database extract creates a database snapshot file for a given mobile user. A partial extract contains only S_SYND_DATA table data.

Some users receive syndicated data updates once a week, while some may receive syndicated data updates monthly or quarterly. Therefore, partial extract is preferred.

Possible Data Loss

Sometimes remote users connect to Siebel Server using unstable dial-up connections that prevent the data file from being transferred correctly, so that the data file does not reach the remote server. Siebel Server does not verify that the data file reached its destination successfully. At the end of the transfer step, Siebel Server removes the data file from the server.

In the case in which a data file is lost and removed from the server, you must extract a new data file for users.

CAUTION: The loss of data or files may occur without warning. You might not be able to automatically determine the success or failure of a particular transfer. As a result, sales representatives may be using incorrect data for up to several months without realizing it.

Troubleshooting Syndicated Data Loading

If the Siebel application client session freezes or terminates during a syndicated data file import, do the following procedure.

To fix a session freeze or termination

- 1 In a DOS window, navigate to the *siebel_server*\FS folder.
- 2 Copy `S_NODE_ATTxxx.SAF` (containing `S_NODE_ATTxxxx.dat`) to `CLIENT\LOCAL\FILES`.
- 3 Navigate to the `CLIENT\LOCAL\FILES` folder.
- 4 Delete `S_NODE_ATTxxxx.dat`.
- 5 Restart the Life Sciences client.
- 6 Click Import.

Views Requiring Syndicated Data Import

This section lists the Siebel Life Sciences views and business components that require data import and indicates which data values should be loaded into the syndicated data table.

[Table 22](#) lists the views that require data import.

Table 22. Views and Business Components Requiring Data Import

Screen	View	Business Component
Accounts	Charts > Sales	Pharma Sales Consumption
	Charts > Profitability	Pharma Consumption

Table 22. Views and Business Components Requiring Data Import

Screen	View	Business Component
Analysis	Direct Sales Trend by Territory - Volume	Pharma GA Sales Consumption
	Direct Sales Trend by Account - Volume	Pharma GA Sales Consumption
	Indirect Sales Trend by Territory - Volume	Pharma GA Sales Consumption
	Indirect Sales Trend by Territory - Share	Pharma GA Sales Consumption
	Indirect Sales Trend by Zip - Volume	Pharma GA Sales Consumption
	Indirect Sales Trend by Zip - Share	Pharma GA Sales Consumption
	Indirect Sales Trend by Brick - Volume	Pharma GA Sales Consumption
	Indirect Sales Trend by Brick - Share	Pharma GA Sales Consumption
	Indirect Sales Trend by Account - Volume	Pharma GA Sales Consumption
	Indirect Sales Trend by Account - Share	Pharma GA Sales Consumption
	Rx Trend by Territory - Volume	Pharma GA Rx Consumption
	Rx Trend by Territory - Share	Pharma GA Rx Consumption
	Rx Trend by Prescriber - Volume	Pharma GA Rx Consumption
	Rx Trend by Prescriber - Share	Pharma GA Rx Consumption
	Rx Trend by Plan and Territory - Volume	Pharma GA Rx Consumption
	Rx Trend by Plan and Territory - Share	Pharma GA Rx Consumption
	Rx Trend by Plan and Prescriber - Volume	Pharma GA Rx Consumption
	Rx Trend by Plan and Prescriber - Share	Pharma GA Rx Consumption
	Rx Trend by Payment Type and Prescriber	Pharma GA Rx Consumption
	Rx Trend by Payment Type and Territory	Pharma GA Rx Consumption
	Rx Trend by Brick	Pharma GA Rx Consumption
	Indirect Sales by Brick-Share	Pharma GA Markets
	Indirect Sales by Brick-Volume	Pharma GA Sales Consumption

Table 22. Views and Business Components Requiring Data Import

Screen	View	Business Component
Contacts	Rx Trend > Rx Trend by Product	Pharma GA Rx Consumption Pharma Consumption
	PreCall > Rx Trend	Contact BC
	PreCall > Rx Trend and Formulary	Pharma GA Rx Consumption
	PreCall > Rx Trend by Plan	
Objectives	My Objectives My Team's Objectives	Pharma Campaign The Actual and Last Actual Update fields are the only fields in the business component that require data import.
	Targets (The Actual Amount fields in the Target Accounts and Target Contacts lists)	Pharma Campaign Target Account Pharma Campaign Target Contact The Actual Amount field is the only field in each business component that requires data import.

Data Loading Matrix for Syndicated Data

The Data Loading Matrix, shown in [Table 23 on page 436](#), and the Attribute by Data Source Matrix, shown in [Table 24 on page 437](#), are provided to facilitate loading sales, Rx, profitability, and influence data. Table 9-4 indicates, by view, the combination of data source, mandatory ID, and plan type values a record must have to be displayed in the view. The following list explains the table headings:

- **View.** Name of the Analysis, Contacts, Accounts, or Products view.
- **Data Source.** Value that determines which view will display the data stored in the record. The valid values are SlsDirAct, SlsDirBrk, SlsDirTer, SlsDirZip, SlsIndAct, SlsIndBrk, SlsIndTer, SlsIndZip, RSPT, RXBrk, RXEVM, RXSMI, RSXMM, RXPrf, RXTer, RXXPT, RXZip, Anlsys ROI, and Anlsys EvsR.

- **Mandatory Id.** Value that indicates the ID field that must be non-NULL for a database record to be displayed in the corresponding view. There are four key ID fields: Account Id, Contact Id, Territory Id, and Zip Id. For each view listed in the table, one of these ID fields is required and the other three must be NULL.
- **Plan Type.** Value that indicates the type of plan ID a database record must have to be displayed in the view.

Table 23. Data Loading Matrix

View	Data Source	Mandatory ID	Plan Type
Accounts > Charts > Sales	SlsIndAct	Account Id	Total
Accounts > Charts > Profitability	Anlsys ROI	Account Id	Total
Analysis > Direct Sales Trend > by Territory - Volume	SlsDirTer	Territory Id	Total
Analysis > Direct Sales Trend > by Account - Volume	SlsDirAct	Account Id	Total
Analysis > Indirect Sales Trend > by Territory - Volume	SlsIndTer	Territory Id	Total
Analysis > Indirect Sales Trend > by Territory - Share	SlsIndTer	Territory Id	Total
Analysis > Indirect Sales Trend > by Zip - Volume	SlsIndZip	Zip Id	Total
Analysis > Indirect Sales Trend > by Zip - Share	SlsIndZip	Zip Id	Total
Analysis > Indirect Sales Trend > by Brick - Volume	S1sIndBrk	Area Id	Total
Analysis > Indirect Sales Trend > by Brick - Share	S1sIndBrk	Area Id	Total
Analysis > Indirect Sales Trend > by Account - Volume	SlsIndAct	Account Id	Total
Analysis > Indirect Sales Trend > by Account - Share	SlsIndAct	Account Id	Total
Analysis > Rx Trend > by Territory - Volume	RXTer	Territory Id	Total
Analysis > Rx Trend > by Territory - Share	RXTer	Territory Id	Total
Analysis > Rx Trend > by Prescriber - Volume	RXPrf	Contact Id	Total
Analysis > Rx Trend > by Prescriber - Share	RXPrf	Contact Id	Total
Analysis > Rx Trend > by Plan and Territory - Volume	RXTer	Territory Id	Plan
Analysis > Rx Trend > by Plan and Territory - Share	RXTer	Territory Id	Plan

Table 23. Data Loading Matrix

View	Data Source	Mandatory ID	Plan Type
Analysis > Rx Trend > by Plan and Prescriber - Volume	RXPrf	Contact Id	Plan
Analysis > Rx Trend > by Plan and Prescriber - Share	RXPrf	Contact Id	Plan
Analysis > Rx Trend > by Payment Type and Prescriber	RXPrf	Contact Id	Payer
Analysis > Rx Trend > by Payment Type and Territory	RXTer	Territory Id	Payer
Contacts > Rx Trend > Rx Trend by Product*	RXPrf	Contact Id	Total
Contacts > Profitability	Anlsys ROI	Contact Id	Total
Contacts > Sample Influence	Anlsys EvsR	Contact Id	Total
Products > Product Profitability > Sample ROI*	Anlsys ROI	Territory Id	Total
Products > Sample Influence	Anlsys EvsR	Territory Id	Total
* Fourth level menu			

Table 24 indicates, by data source, the data values that should be loaded into the syndicated data table (S_SYND_DATA) attribute fields.

Table 24. S_SYND_DATA Attribute by Data Source

Data Source	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5
Anlsys EvsR	TRx	Number of Calls	Number of Samples	Number of Details	
Anlsys ROI	Revenue	Samples Cost	Promotion Cost	Call Expenses	Other Expenses
RSPT	Product NRx	Product TRx	Market NRx	Market TRx	
RXBrk	Product NRx	Product TRx	Market NRx	Market TRx	
RXEVM	Product NRx	Product TRx	Market NRx	Market TRx	
RXPrf	Product NRx	Product TRx	Market NRx	Market TRx	
RXSMI	Product NRx	Product TRx	Market NRx	Market TRx	
RXSMM	Product NRx	Product TRx	Market NRx	Market TRx	

Importing Data

Administrator Procedures

Table 24. S_SYND_DATA Attribute by Data Source

Data Source	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5
RXTer	Product NRx	Product TRx	Market NRx	Market TRx	
RXXPT	Product NRx	Product TRx	Market NRx	Market TRx	
RXZip	Product NRx	Product TRx	Market NRx	Market TRx	
SlsDirAct	Product Sales \$	Product Sales Units			
SlsDirBrk	Product Sales \$	Product Sales Units			
SlsDirTer	Product Sales \$	Product Sales Units			
SlsDirZip	Product Sales \$	Product Sales Units			
SlsIndAct	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	
SlsIndBrk	Product Sales \$	Product Sales Units	Market Sales	Market Sales Units	
SlsIndTer	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	
SlsIndZip	Product Sales \$	Product Sales Units	Market Sales \$	Market Sales Units	

End-User Procedures

Extracted files are transferred using Siebel Remote (as described in *Siebel Remote and Replication Manager Administration Guide*). After mobile users receive their extracted files, they must import the data into their local databases.

The process is described in the following procedure.

To import syndicated data files

- 1** Using Siebel Remote, synchronize your local database with extracted data files that have been routed to you. Extracted data files are received as attachment files.
- 2** Click the Import button and the extracted data files are downloaded to the \LOCAL\FILES folder of your hard drive.
- 3** After importing the extracted data files into your local database, delete the downloaded files from the \LOCAL\FILES folder.

NOTE: Users may postpone downloading of extracted data files by turning off the Retrieved Published Files option in their synchronization setup. Whether or not the extracted data files are downloaded, header information is transferred to the mobile client during the synchronization session. This information appears in the Syndicated Data Files view.

For further information, see *Siebel Remote and Replication Manager Administration Guide*.

Importing Data

End-User Procedures

Information for Siebel Application Developers

A

This appendix involves configuration of the Siebel Life Sciences application using Siebel Tools. It assumes that you are familiar with the processes and conventions of working with Siebel Tools to change one or more user properties. For further information about changing user properties, see *Siebel Tools Reference*.

Targeting Configuration

The Siebel Life Sciences targeting engine can be configured for use in any business component, including those that you create. It uses the user properties found in [Table 25](#) and [Table 26](#).

Table 25. TargetCategory User Property

Field	Required	Description
Name	Required	TargetCategory.
Changed	Read-only	An indicator of whether or not the user property is changed.
Value	Required	A value that the targeting engine uses to determine which saved lists are available to the business component. This value is strictly user-defined. Siebel ePharma ships with the default values “Contacts” for contact-related business components and “Accounts” for account-related business components. One TargetCategory can be active per business component.
Inactive	Optional	An indicator of whether or not the user property is active.
Comments	Optional	Comments describing the user property.

Table 26. TargetId User Property

Field	Required	Description
Name	Required	TargetId.
Changed	Read-only	An indicator of whether or not the user property is changed.
Value	Required	A value the targeting engine uses to determine the field in the business component that will be matched against the saved list ID. If the TargetId record is not defined as a user property for the business component, the targeting engine defaults to ROW_ID. One TargetId can be active per business component.
Inactive	Optional	An indicator of whether the user property is active.
Comments	Optional	Comments describing the user property.

With these user properties, you can apply a target list in any business component and indicate what value in the business component will be stored for later retrieval. For example, to allow targeting functionality on opportunities, add the user property in [Table 27](#) to each Opportunity business component.

Table 27. Example TargetCategory User Property

Field	Required	Description
Name	Required	TargetCategory.
Changed	Read-only	An indicator of whether the user property is changed (optional).
Value	Required	“Opportunity” (or any value you choose).
Inactive	Optional	An indicator of whether the user property is active.
Comments	Optional	Comments describing the user property.

Once active, this user property will allow users to save a target list of opportunities and apply the list across screens in any opportunity-related business component.

New Visit Type Configuration

Using Siebel Tools, you can configure buttons that allow you to generate specific visit-type activities based on predefined visit templates. The default configuration provides three default buttons: Screen, Rescreen, Enroll. It uses user properties found in [Table 33 on page 458](#).

- Create a date field in the Clinical Subject business component and create a date field with the same name in the LS Subject Status VBC business component. This date is used as a starting point for all your visit activities. Visits and Activities in the template belonging to the new visit type are calculated based upon the date entered in this date field and the lead time for the visit or activity.
- Put the user properties in this field. See [Table 33 on page 458](#) for information on what to set for the user properties. You may need to create a new list of values for the Template Type Code and Subject Status Code.
- Create a new popup dialog box based on LS Subject Status VBC business component that displays when a button is clicked from the form. Base the popup dialog box on the CSSFramePopupVstTplDt class. The only required value in this popup dialog box is the VisitTemplateDate control. This date field maps to the date field in the LS Subject Status VBC created above. All fields in this dialog box are treated as required fields. The users must fill in data for each field.
- Add the button to the list or form.

NOTE: The best way to configure these buttons is to copy one of the default button configurations and apply the same properties to your new button.

Sequential Priority Configuration

As mentioned in [Chapter 5, “Recording Calls,”](#) the Siebel administrator can configure the Priority field in the Call Products Detailed list to allow each record added to the list to be sequentially and uniquely numbered, with the first record receiving 1. In the preconfigured application, more than one record can contain 1 in the Priority field.

To enable sequential numbering in the Priority field

- 1** In Siebel Tools, select the Business Component object in the Object Explorer.
- 2** Query for Pharma Account Call.
- 3** Lock the associated project, for example Pharma Call.
- 4** Expand the Business Component object and select the Business Component User Prop object.
- 5** Change the Value field to Y for the Validate Product Priority business component user property.
- 6** Repeat [Step 1](#) through [Step 5](#), running a query for the Pharma Professional Call business component in [Step 2](#).
- 7** Compile the .srf file, selecting the Locked projects radio button.
- 8** Relaunch the application.

Charting Denormalized Syndicated Data

Siebel Life Sciences allows you to chart denormalized syndicated data. To take advantage of this enhancement, configuration is required at the business component, table, and applet levels.

Schema for Territory Data Files

The territory data files created by your syndicated data provider must have the following characteristics:

- They must be plain ASCII files.
- They must follow the schema described in [Table 28](#).

Table 28. Territory File Schema

Field	Type	Length
Record Length	Alphanumeric	8
Territory Number	Alphanumeric	10
ME Number	Alphanumeric	10
Check Digit	Alphanumeric	1
Last Name	Alphanumeric	25
First Name	Alphanumeric	25
Middle Initial	Alphanumeric	1
Suffix	Alphanumeric	4
Title	Alphanumeric	5
Address 1	Alphanumeric	30
Address 2	Alphanumeric	30
Address 3	Alphanumeric	30
Address Indicator	Alphanumeric	1
City	Alphanumeric	28

Table 28. Territory File Schema

Field	Type	Length
State	Alphanumeric	2
Zip Code + 4	Number	9
Specialty	Alphanumeric	3
Called On Code	Alphanumeric	1
No Contact Indicator	Alphanumeric	1
Project Start Date	Alphanumeric	10
Current Week Date	Alphanumeric	10
Prior-To Date	Alphanumeric	10
Client Data	Alphanumeric	49
Programming Info	Alphanumeric	11
PRODUCT A	Alphanumeric	30
Week 9 Beg. Date	Alphanumeric	10
Week 9 End Date	Alphanumeric	10
Week 9 Activity Indicator	Alphanumeric	3
Week 9 Activity Indicator Name	Alphanumeric	10
Week 8 Beg. Date	Alphanumeric	10
Week 8 End Date	Alphanumeric	10
Week 8 Activity Indicator	Alphanumeric	3
Week 8 Activity Indicator Name	Alphanumeric	10
Week 7 Beg. Date	Alphanumeric	10
Week 7 End Date	Alphanumeric	10
Week 7 Activity Indicator	Alphanumeric	3
Week 7 Activity Indicator Name	Alphanumeric	10
Week 6 Beg. Date	Alphanumeric	10

Table 28. Territory File Schema

Field	Type	Length
Week 6 End Date	Alphanumeric	10
Week 6 Activity Indicator	Alphanumeric	3
Week 6 Activity Indicator Name	Alphanumeric	10
Week 5 Beg. Date	Alphanumeric	10
Week 5 End Date	Alphanumeric	10
Week 5 Activity Indicator	Alphanumeric	3
Week 5 Activity Indicator Name	Alphanumeric	10
Week 4 Beg. Date	Alphanumeric	10
Week 4 End Date	Alphanumeric	10
Week 4 Activity Indicator	Alphanumeric	3
Week 4 Activity Indicator Name	Alphanumeric	10
Week 3 Beg. Date	Alphanumeric	10
Week 3 End Date	Alphanumeric	10
Week 3 Activity Indicator	Alphanumeric	3
Week 3 Activity Indicator Name	Alphanumeric	10
Week 2 Beg. Date	Alphanumeric	10
Week 2 End Date	Alphanumeric	10
Week 2 Activity Indicator	Alphanumeric	3
Week 2 Activity Indicator Name	Alphanumeric	10
Week 1 Beg. Date	Alphanumeric	10
Week 1 End Date	Alphanumeric	10
Week 1 Activity Indicator	Alphanumeric	3
Week 1 Activity Indicator Name	Alphanumeric	10
PRODUCT B	Alphanumeric	30

Table 28. Territory File Schema

Field	Type	Length
Week 9 Beg. Date	Alphanumeric	10
Week 9 End Date	Alphanumeric	10
Week 9 Activity Indicator	Alphanumeric	3
Week 9 Activity Indicator Name	Alphanumeric	10
Week 8 Beg. Date	Alphanumeric	10
Week 8 End Date	Alphanumeric	10
Week 8 Activity Indicator	Alphanumeric	3
Week 8 Activity Indicator Name	Alphanumeric	10
Week 7 Beg. Date	Alphanumeric	10
Week 7 End Date	Alphanumeric	10
Week 7 Activity Indicator	Alphanumeric	3
Week 7 Activity Indicator Name	Alphanumeric	10
Week 6 Beg. Date	Alphanumeric	10
Week 6 End Date	Alphanumeric	10
Week 6 Activity Indicator	Alphanumeric	3
Week 6 Activity Indicator Name	Alphanumeric	10
Week 5 Beg. Date	Alphanumeric	10
Week 5 End Date	Alphanumeric	10
Week 5 Activity Indicator	Alphanumeric	3
Week 5 Activity Indicator Name	Alphanumeric	10
Week 4 Beg. Date	Alphanumeric	10
Week 4 End Date	Alphanumeric	10
Week 4 Activity Indicator	Alphanumeric	3
Week 4 Activity Indicator Name	Alphanumeric	10

Table 28. Territory File Schema

Field	Type	Length
Week 3 Beg. Date	Alphanumeric	10
Week 3 End Date	Alphanumeric	10
Week 3 Activity Indicator	Alphanumeric	3
Week 3 Activity Indicator Name	Alphanumeric	10
Week 2 Beg. Date	Alphanumeric	10
Week 2 End Date	Alphanumeric	10
Week 2 Activity Indicator	Alphanumeric	3
Week 2 Activity Indicator Name	Alphanumeric	10
Week 1 Beg. Date	Alphanumeric	10
Week 1 End Date	Alphanumeric	10
Week 1 Activity Indicator	Alphanumeric	3
Week 1 Activity Indicator Name	Alphanumeric	10

Enabling Inventory Reconciliation Without Lot Numbers

As discussed in [Chapter 6, “Managing Samples,”](#) Siebel ePharma allows you to create sample products and associate lot numbers with the samples, then ship and disburse samples by lot numbers while maintaining and reconciling inventory without lot numbers.

Retaining Sample Product Visibility

To allow inventory without lot numbers while retaining sample product visibility, the administrator must do the following:

- Set the value of the Lots For Disperse Only system preference to TRUE
- Check the Lot# Tracking flag in the Product Administration screen
- Use Siebel Tools to reconfigure fields and replace business components

To enable inventory and reconciliation of samples without lot numbers

- 1** From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2** In the System Preference Name list, locate and select the Lots for Disperse Only record.
- 3** Change the field value to TRUE.
- 4** Verify that Sample Lots Enabled system preference is set to TRUE.
- 5** Navigate to Product Administration and check the Lot# Tracking flag.
- 6** Open Siebel Tools.
- 7** Choose View > Object Explorer > Flat tab.
- 8** Select Field, query for any Field with the value Picklist Pharma Samples Stocked Lots, and replace each occurrence with Picklist Pharma All Unexpired Lots.
- 9** Select Applet, query for any business component with the value Pharma Sample Stocked Lots Pick List Applet-CE, and replace each occurrence with Pharma Sample Lot for Picklist.

- 10** Select Applet, query for any business component with the value Pharma Stocked Lot Pick Applet and replace each occurrence with Pharma Sample Lot for Picklist.
- 11** Compile srf.

Business Component User Properties

Siebel business components are based on the CSSBusComp class directly, or on a C++ class derived from CSSBusComp. Business component user properties allow Siebel configurators to control and adjust the behavior of Siebel Life Sciences using Siebel Tools.

General Business Component User Properties

[Table 29](#) lists the user properties that are general and can apply to any business component.

Table 29. User Properties for All Business Components

User Property Name	User Property Value	Description
TargetCategory	<p><i>Value</i></p> <p>User-defined value that connects different business components together so that they interact for the targeting feature.</p> <p>Example: Contacts</p>	Tells the business component which target category to use when saving and applying target lists.
TargetId	<p><i>Field</i></p> <p>Field from the business component you want to save as the ID of the list and use when applying a target list to this business component.</p> <p>Example: Contact Id</p>	Tells the business component which field from the business component to use when saving and applying target lists.

Specific Business Component User Properties

The following business component user properties are specific to a particular C + + class. This means that the properties are valid only for business components that are based on the C + + class implementing the user property or any of the related derived C + + classes.

Group 1 Business Components

Table 30 on page 454 lists the user properties that are related to the following business components:

- Action (class CSSBCActivity)
- Calendar (class CSSBCCalendar)

Table 30. User Properties Related to Group 1 Business Components

User Property Name	User Property Value	Description
Read-only Activity Types	, <i>ActivityType1,Activity Type2,...</i> , Value must start and end with a comma, and no spaces between values. Example: ,Attendee Call,Meeting Invitee,	Tells the business component which activity types are to be read-only at the record level. Activity Type is the field category.
Read-only Fields for 'Activity Type' Activity Type is the category value. Example: Read-only Fields for 'Account Call'	, <i>field1,field2,...</i> , Value must start and end with a comma, and no spaces between values. Example: ,Contact Last Name,Opportunity,	Tells the business component which fields are to be read-only for a particular activity type. Activity Type is the field category.
Status Field	<i>Field</i> Field from the business component.	Tells the business component which field is to be used to indicate the status.

Group 2 Business Components

Table 31 lists the user properties that are related to the following business components:

- Pharma Call Products Detailed (class CSSBCProductDetailed)
- Pharma GA Call Products Detailed (class CSSBCProductDetailed)

Table 31. User Properties Related to Group 2 Business Components

User Property Name	User Property Value	Description
Max Auto Generated Priority	<i>Number</i> A numeric value. Example: 3	Tells the business component the maximum number to go up to when auto-generating priorities for the products detailed.
Template Fields	<i>Field1,field2,...</i> No start or end comma or spaces between values. Example: Name,Priority,Product Issue	Tells the business component what fields to copy from the Smart Call template if a Smart Call is chosen.

Group 3 Business Components

[Table 32 on page 456](#) lists the user properties that are related to the following business components:

- Pharma Account Call
- Pharma Attendee Call
- Pharma Template Call
- Pharma Contact Call
- Pharma Promotional Items Dropped
- Pharma Contact Call Sample Dropped
- Pharma Activity Product Issues
- Pharma Call Sample Dropped
- Pharma Meeting
- Pharma Meeting Attendee

- Pharma Meeting Activity
- Pharma Meeting Speaker

NOTE: Not all properties are used in all business components.

Table 32. User Properties Related to Group 3 Business Components

User Property Name	User Property Value	Description
Cascading Fields	, <i>field1,field2</i> ,... Value must start and end with a comma. Example: ,Start Date,Start Time,	Tells the business component which fields should cascade values to a child call component. Make these fields Force Active in the child call. Works in combination with the SubCall Component user property.
Must Detail Products	Y or N	Tells the business component whether detailed products are required for a call.
OnlySubmitByPosition	Y or N	Tells the business component whether the position that entered the record is the only one that can submit it.
Status Field	<i>Field</i> Field from the business component.	Tells the business component which field is to be used to indicate the status of the activity.
SubCall Component	<i>Business component name</i> Any business component name.	Tells the business component the child component to which it should cascade values. Works in combination with the Cascading Fields user property.
Template Components	<i>Business component name</i> Any business component name.	Tells the business component what child components should be copied from the Smart Call template if a Smart Call is chosen.
Template Fields	<i>Field1,field2</i> ,... No start or end comma. Example: Name,Priority,Product Issue	Tells the business component what fields to copy from the Smart Call template if a Smart Call is chosen.

Table 32. User Properties Related to Group 3 Business Components

User Property Name	User Property Value	Description
Attendee Call ReadOnly	,field1,field2,..., Value must start and end with a comma. Example: ,Start Date,Start Time,	Tells the business component what fields are read-only when the type is Attendee Call.
Validate Sample Ref #	Y or N	Tells the business component whether it should require a sample reference number when submitting a call.
Update After Submit	,field1,field2,..., Value must start and end with a comma. Example: ,Comment,	Tells the business component what fields are editable after a call is submitted. Generally this user property should be used only to make the Comment field editable.
Update After Synch	,field1,field2,..., Value must start and end with a comma. Example: ,Comment,	Tells the business component what fields are editable after a call is synchronized (with Siebel ePharma Handheld on a PDA). Generally this user property should be used only to make the Comment field editable.

Group 4 Business Components

[Table 33](#) lists the user properties that are related to the Clinical Subject (class CSSBCBClinicalSubject) business components.

These properties, used within the eClinical application, allow you to configure new buttons in the application that relate to subject activity. These user properties are at the Field level (Business Component > Field > Field User Properties).

Table 33. User Properties Related to Group 4 Business Components

User Property Name	User Property Value	Description
Template Type Code	<i>No default.</i> Select CLNCL_SUBJ_VST_TMPL_TYPE from the List of Values (Application Administration > List of Values > List of Values)	Defines the visit activity applied when the newly configured button is selected.
Subject Status Code	<i>No default.</i> Select CLNCL_SUBJECT_STATUS from the List of Values (Application Administration > List of Values > List of Values)	Defines the status for the subject that is applied when the newly configured button is selected.
Template Version Field Name	<i>No default.</i> Must be made Force Active in the Business Component.	The corresponding Version ID Field Name that is populated with the version ID of the template version that created the activity.
Subject Consent Required	Y or N Default = N	This flag indicates whether or not the subject has the Informed Consent Date filled in for the active template for your protocol site. If you set this to Y, and the date is not filled in correctly, an error occurs.
Append All Activities	Y or N Default = N	When set to Y, activities are appended.

Configuring the Visit Generation Buttons

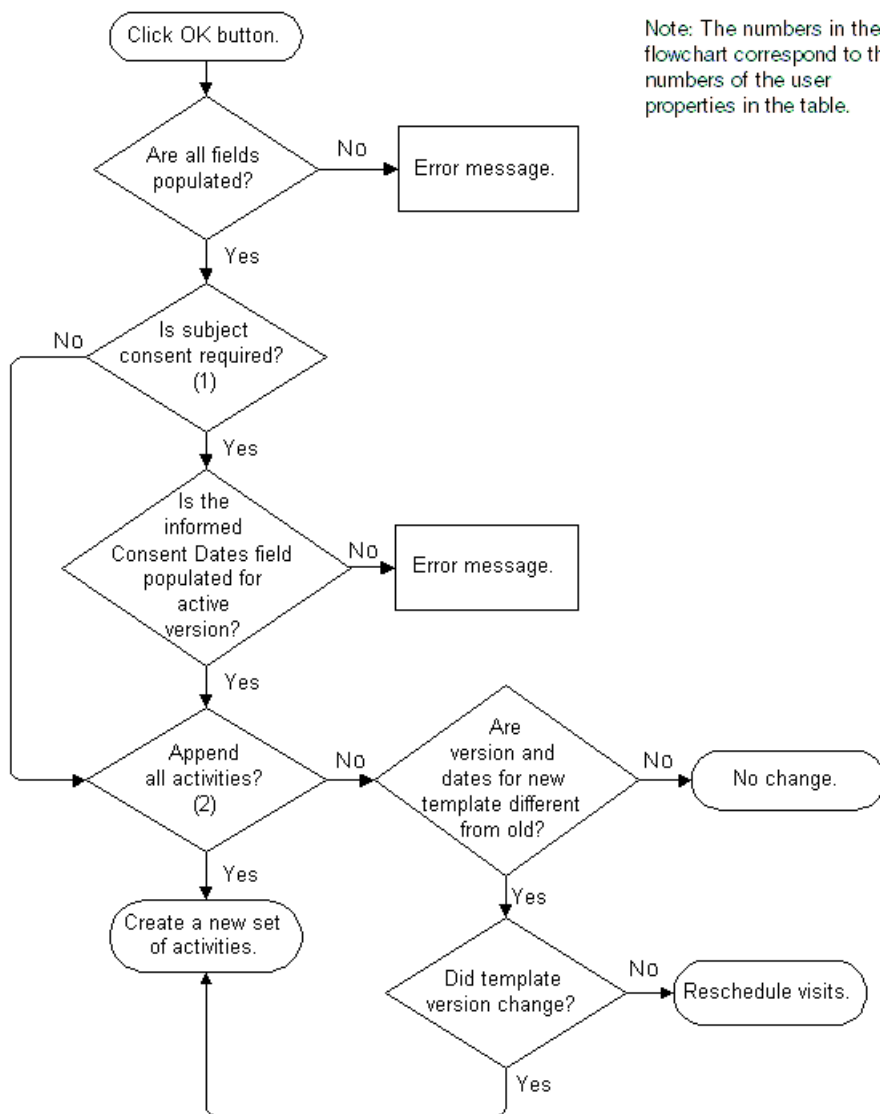
The standard Siebel eClinical application has three visit generation buttons (Screen, Rescreen, and Enroll) on the Subject form.

Using Siebel Tools, you can:

- Reconfigure the buttons to better suit your business needs

- Create new buttons for application of additional templates on the Subject form

The following flow chart illustrates the logic behind these buttons. The logic is the same for all three buttons, although content of the error messages does vary.



Configuring the Submit Button

As mentioned in [Chapter 5, “Recording Calls”](#) and in [Chapter 6, “Managing Samples,”](#) when you click the Submit button in either the Contact Call Detail and Account Call Detail views, the application verifies that at least one product has been recorded and detailed. [Table 34](#) describes the specific actions that occur when clicking the Submit button in the views in which it appears.

This requirement can be changed by the administrator using Siebel Tools. The business component user property is Update After Submit. By default, only Comment is editable after clicking the Submit button. [Table 32 on page 456](#) shows the user property values that are to be changed.

Table 34. Submit Button

View	Access Path	Transaction Type	Clicking the Submit Button...
Contact Call Detail	Activities > Contact Call Detail	Disbursement	Changes the Contact Call detail Status field Submitted. Except for the Comment field, sets the record to read-only. Sets all child records to read-only. If samples were dropped, creates a Samples Transaction History record.
Inventory Count	Samples > Inventory Count		Verifies each value has been entered in the Count field. Changes the status of each record to Inactive. Creates an active transaction by moving the count to the latest inventory period.

Table 34. Submit Button

View	Access Path	Transaction Type	Clicking the Submit Button...
Sent Samples	Samples > My Samples Adjustments	Inventory Adjustment	<p>Updates the user inventory to reflect the quantity entered in Line Items list Quantity field.</p> <p>Updates Sample Adjustments by changing the Active Flag to N (No).</p> <p>If the Transfer Status is Submitted, the application updates Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y (Yes) ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted
Sent Samples	Samples > My Sent Samples	Transfer Out	<p>Updates the user inventory to reflect the quantity entered in Line Items list Quantity field.</p> <p>Updates My Sent Samples by setting the Active Flag to N (No).</p> <p>If the Transfer Status is Submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Update Flag to Y (Yes) ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted

Table 34. Submit Button

View	Access Path	Transaction Type	Clicking the Submit Button...
Sample Order	Samples > My Samples Order	Sample Order	<p>Updates the user inventory to reflect the quantity entered in Line Items list Quantity field.</p> <p>Update Samples Order by setting the Active Flag to N.</p> <p>If the Order Status is submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted
Received Samples	Samples > My Received Samples	Transfer In	<p>Updates the user inventory to reflect the quantity entered in Line Items list Received Quantity field.</p> <p>Updates Sample Invoices by setting the Active flag to N.</p> <p>If the Invoice Status is submitted, the application updates the Line Items list by:</p> <ul style="list-style-type: none"> ■ Setting the Stock Update flag to Y ■ Updating the Stock Position ID ■ Changing the Item Status to Submitted

Changing Read-Only Fields

As mentioned in [Chapter 5, “Recording Calls”](#) and in [Chapter 6, “Managing Samples,”](#) the Siebel administrator can change the fields that become read-only after a call is submitted (or synchronized with Siebel ePharma Handheld on a PDA).

Read-only properties are shown in [Table 30 on page 454](#). The User Property Value column shows how the user property values are to be changed.

Special MedEd Classes—User Properties

In Siebel 7, two special C++ classes have been created for MedEd:

- CSSBCPharmaMEPlan
- CSSBCPharmaMESubPlan

Both classes support EditMode user property. When the EditMode user property value is set to the value Admin, the data ownership (granting update or delete privilege to the user) is not checked. This means that anyone on the sales team, for example, can update the fields in this business component.

Two existing Buscomp classes, CSSBCPharmaMEActCost and CSSBCPharmaMEEventPos, are classes without these user properties, and therefore require administrator privileges to update or delete.

Controlling Query Behavior in Multi-Value Group Fields

In order to implement the Siebel Life Sciences Targeting functionality, the default behavior of queries in Multi-Value Group (MVG) fields has been changed. In this new MVG behavior, an EXISTS statement is automatically added to every query in Siebel Life Sciences. This allows detailed cross-business object queries in the Targeting view. For example:

- Find all the Contacts
- Who are ranked High in a specific therapeutic class
- Who have not been visited for over a month by any sales representative
- With a best time to call on Monday afternoon

This MVG behavior, however, also prevents the following query in an MVG field:

EXISTS (A) AND EXISTS (B).

To disable the EXISTS statement

- 1** From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2** Set the Default MVG Exists Query to FALSE.

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