Siebel

Life Sciences Guide

June 2021

Siebel
Life Sciences Guide

June 2021

F87459-02

Copyright © 1994, 2021, Oracle and/or its affiliates.

Author: Sukanya Mishra

Contents

Get Help i

1 What's New in This Release 1
What's New in Siebel Life Sciences Guide, Siebel CRM 21.6 Update 1
What's New in Siebel Life Sciences Guide, Siebel CRM 20.1 Update 1

2 Overview of Life Sciences 3
Overview of Life Sciences 3
About Siebel Life Sciences 3
About Siebel Clinical 3
About Siebel Medical 3
About Siebel Pharma 5
Product Modules and Options 6
Business Functions of Screen Tabs in Siebel Life Sciences 6

3 Setting Up Siebel Medical 11
Setting Up Siebel Medical 11
About Setting Up Siebel Medical 11
Administrative Setup Tasks for Siebel Medical 13
About the My Team's Filter 14
Using Assignment Manager in Siebel Medical 15

4 Setting Up Siebel Pharma 19
Setting Up Siebel Pharma 19
About Setting Up Siebel Pharma 19
Administrative Setup Tasks for Siebel Pharma 21
About the My Team's Filter 23
Using Assignment Manager in Siebel Pharma 23
Enforcing Siebel Life Sciences Activity Status Behavior in Other Siebel Applications 26

5 Managing Contacts in Life Sciences 27
Managing Contacts in Life Sciences 27

About Managing Contacts in Life Sciences 27
Scenario for Managing Contacts 27
Process of Managing Contacts 28

6 Administering and Managing Accounts in Life Sciences 41
Administering and Managing Accounts in Life Sciences 41
About Administering and Managing Accounts in Life Sciences 41
About Account Hierarchies 41
About Bricks 42
Scenario for Accounts 42
Process of Managing Accounts 43
About Configuring the Generate Hierarchy Button 56

7 Managing Products for Life Sciences 59
Managing Products for Life Sciences 59
About Managing Products for Life Sciences 59
How Siebel Life Sciences Stores Product Information 59
Scenario for Managing Life Sciences Products 60
Process of Managing Products 60
Creating a Product Change Request 78
Capturing Product Hierarchies for Siebel Medical 79
Configuring Lot Numbers for Other Products 79

8 Planning Calls 81
Planning Calls 81
About Planning Calls 81
Tools for Planning Calls 81
Scenario 1: Users Create Target Lists 83
Scenario 2: Users Define Route Plans 83
Scenario 3: Users Create Activities 84
Process of Planning Calls 85
Creating a Contact Call 95
Creating an Account Call 98
Call Planning Features Specific to the Japanese Pharmaceutical Market 100
Managing the PMS and Pre-Explain PMS Features 102
Managing the PID Feature 104

9 Completing Contact and Account Call Activities 107
Completing Contact and Account Call Activities 107
About Contact and Account Call Activities 107
Transaction Processing for Call Activities 107
About Electronic Signature Capture 110
Scenario for Completing Call Activities 111
Process of Completing Call Activities 112
Remaking Electronic Signatures 120
Configuring the New Call Button 121
Configuring the Submit Button 121
Configuring Signature Capture 122
Rendering Signatures in the UI 129
Marking Package Insert Delivery and Post Market Surveillance Calls as Complete 130

10 Managing Pharma Samples 133
Managing Pharma Samples 133
About Managing Pharma Samples 133
About Samples Transactions 133
About Samples and Lot Numbers 136
Scenarios for Managing Samples 137
Managing Samples Transactions 140
Managing Pharma Samples 141

11 Creating Smart Calls 177
Creating Smart Calls 177
About Creating Smart Calls 177
Scenario for Smart Calls 177
Administering Smart Calls 179
Creating a Smart Call (End-User Task) 181
About Applying a Smart Call Template to a Call 182

12 Managing Managed Care Accounts 183
Managing Managed Care Accounts 183
About Managed Care in Siebel Life Sciences 183
Scenario for Managed Care 185
Process of Using Siebel Managed Care 186

13 Managing Account Contacts in Life Sciences 195
Managing Account Contacts in Life Sciences 195
About Japanese Pharmaceutical Market Features 195
About Account Contacts 196
Configuring Workflows for Account Contacts 196
Managing Account Contacts 197
Planning Calls in the Call Planning Screens 203

14 Analyzing Syndicated Data 211
Analyzing Syndicated Data 211
About Analyzing Syndicated Data 211
Scenario for Analysis 211
Process of Analysis 212
Views in the Analysis Screen 215

15 Tracking Time Off Territory 219
Tracking Time Off Territory 219
About Tracking Time Off Territory 219
Scenario for Time Off Territory 219
Process of Tracking Time Off Territory 220
Configuring Time Off Territory 222

16 Managing Pharma Medical Education Events 223
Managing Pharma Medical Education Events 223
About Managing MedEd Events 223
MedEd Terminology 223
About MedEd Event Types 224
Scenario for MedEd Events 224
Process of Managing MedEd Events 225

17 Setting and Achieving Objectives 243
Setting and Achieving Objectives 243
About Setting and Achieving Objectives 243
Scenario for Objectives 243
Process of Setting Up Objectives 244

18 Importing Data into Life Sciences 251
Importing Data into Life Sciences 251
Scenario for Importing Data 251
Process of Importing Data 252
Importing, Extracting, and Routing Syndicated Data 259
Extracting Data for Mobile Users 263
Troubleshooting Syndicated Data Loading 269
Views Requiring Syndicated Data Import 269
Data Loading Matrix for Syndicated Data 271
Importing Syndicated Data Files 274

19 Capturing Adverse Events and Complaints 277
Capturing Adverse Events and Complaints 277
About Adverse Events and Complaints Management 277
About Capturing Adverse Events and Complaints 279
Scenario for Capturing and Escalating Adverse Events and Complaints 281
Process of Capturing and Escalating Adverse Events and Complaints 282
About Configuring Adverse Events and Complaints Capture 291

20 Investigating Adverse Events and Complaints 293
Investigating Adverse Events and Complaints 293
About Investigating Adverse Events and Complaints 293
Scenario for Complaint Investigation 293
Process of Adverse Events and Complaints Investigation 294
About Configuring Create Related PI and Review Complete Buttons 305
About the LS Medical Product Issue Service Business Service 307

21 Recording Product Analysis for Adverse Events and Complaints Management 309
Recording Product Analysis for Adverse Events and Complaints Management 309
About Recording Product Analysis for Adverse Events and Complaints Management 309
Scenario for Product Analysis Arising from a Complaint 310
Process of Product Analysis Following a Product Issue 311
About Configuring Product Analysis Approvals 315

22 Managing Corrective and Preventative Actions 319
Managing Corrective and Preventative Actions 319

About Managing Corrective and Preventative Actions 319
Scenario for Managing Corrective and Preventive Actions 320
Process of Managing Corrective and Preventive Actions 321

23 Regulatory Reporting 327

Regulatory Reporting 327
About Regulatory Reporting 327
About Regulatory Reports 327
Scenario for Regulatory Reporting 329
Process of Regulatory Reporting 330
Field Mapping for the MedWatch Report 346
Field Mapping for the MDV Report 356
About Configuring Buttons in Regulatory Reports 359

24 Communicating with Customers for Adverse Events and Complaints Management 363

Communicating with Customers for Adverse Events and Complaints Management 363
About Communicating with Customers for Adverse Events and Complaints Management 363
Scenario for Customer Communication 363
Process of Customer Communication for Adverse Events and Complaints Management 364

25 Closing Adverse Events and Complaints 367

Closing Adverse Events and Complaints 367
About Closing Adverse Events and Complaints 367
Scenario for Closing Adverse Events and Complaints 367
Process of Closure for Adverse Events and Complaints Management 368
About Configuring Close and Reopen Buttons for Product Issues 371

26 Using Personalizing Content Delivery 373

Using Personalizing Content Delivery 373
About Personalized Content Delivery 373
Defining System Preferences for Personalized Content Delivery 373
Managing Content for Personalized Content Delivery 374
Working with Messaging Plans 381
Accessing and Delivering Messaging Plans Using the PCD Viewer 390
Using Signature Control for Personalized Content Delivery 396

27 Setting Up and Configuring Safety System Integration 403
Setting Up and Configuring Safety System Integration 403
Overview of Safety System Integration 403
Customizing Safety System Integration Web Services 404
Process of Setting Up Safety System Integration for Siebel Medical 405
Logging a Product Issue for Safety System Integration 410
Reviewing a Product Issue for Safety System Integration 412
Sending a Product Issue to the Safety System 413
Sending Product Issue Follow-Up Information to the Safety System 413
Verifying Case Acceptance by the Safety System 414
Verifying Case Rejection by the Safety System 414
Voiding a Product Issue in Siebel Medical 414

28 Siebel Medical Developer's Reference 415
Siebel Medical Developer's Reference 415
Siebel Medical Workflow Reference 415
Siebel Medical Web Services Reference 416

29 Siebel Pharma Developer's Reference 417
Siebel Pharma Developer's Reference 417
Overview of User Properties for Siebel Pharma 417
Targeting Configuration 417
Enabling Inventory Reconciliation Without Lot Numbers 419
Editing the Labels of the LS Pharma HI Activity Calendar View Buttons 420
Configuring the EditMode User Property 420
Submitting Contact Details from Third-Party Applications 421
Configuring Account Contacts 422
Configuring Personalized Content Delivery 423
Pharma Service User Properties 435
Siebel Pharma Business Component User Properties 455

30 Configuring Data for Oracle Pharma Sales Analytics 489
Configuring Data for Oracle Pharma Sales Analytics 489
Transactional Data Requirements 489
Configuring Product Hierarchies and Product Costs 490
Configuring Product Catalog and Category Hierarchies 491

Setting Up Sales Objectives 493
Entering Call Activity Data 494
Configuring Sales Territories for Pharma Sales Analytics 495
Creating Target Lists Using Oracle Business Intelligence 500
Using Target List Creator with Siebel Pharma Applications in Connected Mode 501

Get Help

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *https://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an email to: *oracle_fusion_applications_help_ww_grp@oracle.com*.

1 What's New in This Release

What’s New in Siebel Life Sciences Guide, Siebel CRM 21.6 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Setting the Server Uncompression Location and Other System Preferences *Modifying a Tooltip in the PCD Viewer*	Modified topics. As of Siebel CRM 21.2 Update, the **applicationcontainer** directory has been replaced by two directories, as follows: • **applicationcontainer_external** (for Siebel Application Interface) • **applicationcontainer_internal** (for all other Siebel Enterprise components) In the Siebel Application Interface installation, web artifacts for application configurations, which were formerly located in **applicationcontainer\webapps\siebel**, now map to **applicationcontainer_external\siebelwebroot**. This directory contains subdirectories such as **files**, **fonts**, **htmltemplates**, **images**, **migration**, **scripts**, and **smc**. For more information, see *Siebel Installation Guide* .

What’s New in Siebel Life Sciences Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview of Life Sciences

Overview of Life Sciences

This chapter provides an overview of Oracle's Siebel Clinical, Siebel Medical, and Siebel Pharma products. It includes the following topics:

- *About Siebel Life Sciences*
- *About Siebel Clinical*
- *About Siebel Medical*
- *About Siebel Pharma*
- *Product Modules and Options*
- *Business Functions of Screen Tabs in Siebel Life Sciences*

> **Note:** The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

About Siebel Life Sciences

Siebel Life Sciences is comprised of the Siebel Clinical, Siebel Medical, and Siebel Pharma products. 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 Clinical

Siebel Clinical 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.

For more information on Siebel Clinical, see *Siebel Clinical Trial Management System Guide* .

About Siebel Medical

Siebel Medical is a suite of business 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 Medical supported functionality:

- 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)
- Support for creating and executing complex agreements, which helps make sure correct delivery of benefits and execution of penalties
- Adverse Event and Complaints management to handle the complete life cycle of a complaint or adverse event, including generation of reports and follow-up reports for submission to regulatory agencies
- 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 Pharma

Siebel Pharma is a suite of business applications specifically designed for the pharmaceutical industry. Siebel Life Sciences provides the 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 Pharma supported functionality:

- 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) 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

Product Modules and Options

You can purchase many Siebel Business Applications modules and use them with Siebel Life Sciences. In addition, you can purchase the optional modules that are specific toSiebel Life Sciences to provide enhanced functionality for various business processes.

For information about the optional modules to use with Siebel Life Sciences, contact your Oracle sales representative.

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 *Siebel Fundamentals* on the Siebel Bookshelf.

> **Note:** The Siebel Bookshelf is available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle Software Delivery Cloud.

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.

The following information lists the most frequently used Siebel Life Sciences screens and the functions of the views in those 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.	*Administering and Managing Accounts in Life Sciences*
Accounts Contacts	Manage information about account-contact affiliations within dedicated Accounts Contacts List views, and also within an Accounts Contacts Weekly Call Planning screen. The Account-Contact records displayed in these screens are managed within the Siebel Pharma application as a set of separate Targeting records for each Sales Representative Position.	*Managing Account Contacts in Life Sciences* in this guide

Screen Tab	Functions	For More Information
Activities	Manage activities with contacts and accounts, and create contact and account calls (with or without Smart Calls).	*Planning Calls* in this guide and *Siebel Applications Administration Guide* .
Agreements	Manage information about agreements, administrative contracts, and entitlements.	*Siebel Field Service Guide* .
Analysis	Display prescriber, account, plan, payer, and territory-level sales and Rx data.	*Analyzing Syndicated Data* in this guide
Assets	Manage information about products sold to accounts.	*Siebel Field Service Guide*
Business Plans	Create business plans for MCO (Managed Care Organizations) and PBMs (Pharmacy Benefit Managers).	*Managing Managed Care Accounts* in this guide
Calendar	Create and display activities (including to-do activities) and share calendar information with coworkers.	*Planning Calls* in this guide and *Siebel Fundamentals*
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	*Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide*
Clinical Programs	Manage information about clinical trial programs.	*Siebel Clinical Trial Management System 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.	*Managing Contacts in Life Sciences* in this guide
Corrective Actions	Manage corrective actions for adverse events and complaints.	*Managing Corrective and Preventative Actions* in this guide
Document Tracking	Track documents at multiple levels (Site, Region, or Protocol) for multiple entities (Contact or Account)	*Administering and Managing Accounts in Life Sciences* *Managing Contacts in Life Sciences* *Siebel Clinical Trial Management System Guide*
Expense Reports	Manage expense report information for your expenses, or your team's expenses.	*Siebel Project and Resource Management Administration Guide*
Forecasts	Create business forecasts based on opportunities or products.	*Siebel Forecasting Guide*
Home	The first screen you see when you log in to theSiebel Life Sciences application. It is a centralized screen that summarizes contacts, accounts, and activities.	*Siebel Fundamentals*
List Management	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.	*Planning Calls* in this guide

Screen Tab	Functions	For More Information
Literature	Display company- and industry-related literature cataloged by the Oracle administrator.	*Siebel Applications Administration Guide*
MedEd	Manage medical education events.	*Managing Pharma Medical Education Events* in this guide
Objectives	Define objectives for contacts and accounts and monitor progress made toward meeting goals.	*Setting and Achieving Objectives* in this guide
Opportunities	Manage formulary opportunities and affiliate contacts, accounts, and other information with a particular opportunity.	*Siebel Applications Administration Guide*
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.	*Siebel Order Management Guide*
Product Issues	Managing adverse events and complaints made against medical products.	*Investigating Adverse Events and Complaints Communicating with Customers for Adverse Events and Complaints Management* and *Communicating with Customers for Adverse Events and Complaints Management* in this guide
Products	Display current product information, including key features and product trends.	*Managing Products for Life Sciences* in this guide
Quotes	Automatically generate quotes tailored to meet customer requirements.	*Siebel Order Management Guide*
Receiving	Record and review information relating to a physical receipt of material.	*Siebel Field Service Guide*
Regulatory Reports	Create Managing complaints made against medical products.	*Regulatory Reporting* in this guide
Repairs	Track defective products returned to a service center for repair.	*Analyzing Syndicated Data* in this guide and *Siebel Field Service Guide*
Routes	Create routes to schedule regular visits to groups of accounts.	*Planning Calls* in this guide
Samples	Organize phases of samples workflow: shipments, orders, adjustments, inventory counts, and reconciliation.	*Managing Pharma Samples* in this guide
Service Requests	Manage requests for medical or product information, adverse events, complaints, and related activities and attachments.	*Capturing Adverse Events and Complaints* in this guide and *Siebel Field Service Guide*
Shipping	Record and review information relating to a physical shipment of material.	*Siebel Field Service Guide*

Screen Tab	Functions	For More Information
Smart Calls	Create and edit Smart Call templates that are applied in the Contact Call Detail and Account Call Detail views.	*Creating Smart Calls* 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).	*Siebel SmartScript Administration Guide*
Solutions	Enter and display resolutions successfully used for reported problems.	*Siebel Field Service 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.	*Tracking Time Off Territory* in this guide
Time Sheets	Track employee time, by project, for compensation and billing purposes.	*Siebel Project and Resource Management Administration Guide*

3 Setting Up Siebel Medical

Setting Up Siebel Medical

This chapter covers setting up Siebel Medical. It includes the following topics:

- *About Setting Up Siebel Medical*
- *Administrative Setup Tasks for Siebel Medical*
- *About the My Team's Filter*
- *Using Assignment Manager in Siebel Medical*

About Setting Up Siebel Medical

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

Siebel Applications Administration Guide covers the setup tasks that are common to all Siebel Business 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 the table in *Administrative Setup Tasks for Siebel Medical* before following the procedures in *Siebel Applications Administration Guide* .

This guide assumes that you have already installed Siebel Life Sciences or completed an upgrade from another Siebel Business 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 Installation Guide* , and *Siebel System 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.

Enabling Siebel Server Component Groups for Siebel Medical

This system administration task describes how to activate the component groups that are required for Siebel Medical.

To enable Siebel Server component groups for Siebel Medical

1. Navigate to the Administration - Server Configuration screen, and then the Component Groups view.

2. Query for the Workflow Management Component Group.
3. On the Component Groups applet, click the Enable button.
4. Query for the EAI Component Group.
5. On the Component Groups applet, click the Enable button
6. Navigate to the Administration – Server Management screen, then the Servers and Component Groups view.
7. Verify that the State value for the Workflow Management and EAI Component Groups is set to Online.
8. Navigate to Administration – Server Configuration screen, then the Enterprises and Synchronize view.
9. Click Synchronize.
10. Restart the Siebel Server.

Activating Workflows for Siebel Medical

This system administration task describes how to activate the workflows required for Siebel Medical.

These Workflow Processes are named with this pattern: Medical*.

For more information on activating Siebel workflows, see *Siebel Business Process Framework: Workflow Guide* .

Configuring Web Services for Siebel Medical

This task describes how to configure the inbound Web service that is required for Siebel Medical.

> **Note:** It is recommended that you use HTTPS authentication. For information on configuring Secure Sockets Layer (SSL) for HTTPS authentication, see *Siebel Security Guide* .

To configure Web services for Siebel Medical

1. Navigate to the Administration - Web Services screen, then the Inbound Web Services view.
2. Query for the SWI LS Medical Product Issue Create Inbox Item Inbound Web service.
3. On the Service Ports applet, update the Address variable to point to your Web server.
4. Configure the Language variable.
5. Query for the SWI LS Medical Update Product Issue Inbound Web service.
6. On the Service Ports applet, update the Address variable to point to your Web server.
7. Configure the Language variable.
8. Click Clear Cache on the Inbound Web Services applet.

For more information on configuring Web Services, see *Integration Platform Technologies: Siebel Enterprise Application Integration* on the *Siebel Bookshelf* .

Setting Up Siebel Medical for Integration with a Third-Party Safety System

For information on setting up Siebel Medical for integration with a third-party payments application, see *Process of Setting Up Safety System Integration for Siebel Medical*.

Administrative Setup Tasks for Siebel Medical

The information in the following table lists the administrative setup procedures that are specific to Siebel Medical and procedures that might differ from those of the other Siebel Business Applications. The table also directs you to documentation containing information about each task.

When setting up your application, use the following table in combination with the main resource, *Siebel Applications Administration Guide* .

Administrative Task	Description	For More Information
Define medical specialties	• Defining medical specialties • Defining account specialties • Specifying a contact's primary specialty	*Managing Contacts in Life Sciences*
Set up bricks	• Defining bricks • Associating a brick with a contact address	*Managing Contacts in Life Sciences*
Define decision issues	• Defining decision issues	*Managing Contacts in Life Sciences* *Managing Products for Life Sciences*
Specifying a Competitor	• Deleting an account • Creating or identifying a competitor	*Administering and Managing Accounts in Life Sciences* *Managing Contacts in Life Sciences* *Completing Contact and Account Call Activities*
Administer Smart Calls	• Creating a smart call template and making it available to end users	*Creating Smart Calls* *Managing Pharma Samples*
Configuring Time Off Territory	• Configuring Time Off Territory approval process	*Tracking Time Off Territory*
Managing Accounts Contacts in Life Sciences	• Activating workflows for accounts contacts • Enabling server components for accounts contacts • Setting up targeting data for a new period • Activating new targeting data • Generating column maps for accounts contacts list • Creating product data to display in accounts contacts List	*Managing Account Contacts in Life Sciences*
Importing Data	• Importing data with EIM • Importing, extracting, and routing syndicated data • Charting denormalized syndicated data	*Importing Data into Life Sciences*

Administrative Task	Description	For More Information
Administering products	• Creating an external product • Creating an internal product or a market • Making a product inactive • Specifying additional product features • Entering information on related products • Associating related literature • Entering product comparison information • Creating a price list • Associating a price list with a product • Decision issues or product issues	*Managing Products for Life Sciences*
Configuring Siebel Medical	• Configuring Siebel Medical Workflows • Customizing Siebel Medical Web Services	*Siebel Medical Developer's Reference*

About 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.

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.

The following information lists the default setting of the Manager List Mode user property for some Siebel Medical screens and business components.

Screen	Business Component	Manager List Mode
Accounts	Accounts	Inactive
Contacts	Contact	Inactive
MedEd	Pharma ME Event Professional Invitee	Active
Objectives	Objective	Active

Using Assignment Manager in Siebel Medical

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* . For additional information on creating territories and running territory realignments, see *Siebel Territory Management Guide* .

This topic provides Siebel Assignment Manager information that is specific to Siebel Medical.

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. The following table 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 Business Applications and currently conflicts with Siebel Life Sciences assignment rules. Siebel Life Sciences uses the assignment item type Industry SIC Code.

Assignment Object	Modifications
Account	The assignment criteria SIC Code has been renamed Account Class of Trade. Its assignment criteria are: • Account City State Country • Account Brick Account Brick source table has been changed to S_CON_ADDR and source column has been changed to BRICK_ID.
Contact	This assignment object was created specifically for Siebel Life Sciences and is not described in *Siebel Assignment Manager Administration Guide* . The assignment criteria are: • 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

Assignment Object	Modifications
	• Position

Contact Assignments in Siebel Medical

In most Siebel Business Applications, assignment of contacts is based on primary address. This process is different for Siebel Life Sciences. A Siebel Life Sciences contact can have multiple addresses, and each representative on the contact's sales team can 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*.

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
  - The Direct field in the Accounts, Contact Affiliations view

  For more information, see *Indicating an Affiliation Between an Account and a Contact*.
- 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 activate 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, because 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".

4 Setting Up Siebel Pharma

Setting Up Siebel Pharma

This chapter covers setting up Siebel Pharma. It includes the following topics:

- *About Setting Up Siebel Pharma*
- *Administrative Setup Tasks for Siebel Pharma*
- *About the My Team's Filter About the My Team's Filter*
- *Using Assignment Manager in Siebel Pharma*
- *Enforcing Siebel Life Sciences Activity Status Behavior in Other Siebel Applications*

About Setting Up Siebel Pharma

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

Siebel Applications Administration Guide covers the setup tasks that are common to all Siebel Business 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 the table in *Administrative Setup Tasks for Siebel Pharma* before following the procedures in *Siebel Applications Administration Guide* .

This guide assumes that you have already installed Siebel Life Sciences or completed an upgrade from another Siebel Business 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 Installation Guide for the operating system you are using* , and *Siebel System 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.

Configuring Pharma Properties in the Siebel Runtime Repository

User properties are object definitions that are added to an applet, business component, control, field, or list column to configure specialized behavior. Some Siebel Pharma features are driven by user properties. You can customize these features through their respective user properties. With user properties, you can control UI behavior, change default

settings or leave them as they are, and enable or disable features. For information on enabling and configuring the runtime repository object definitions required for Siebel Pharma, see *Siebel Pharma Developer's Reference*.

Enabling Server Component Groups for Siebel Pharma

This system administration task describes how to activate the component groups that are required for Siebel Pharma.

These Workflow Processes are named with this pattern: Pharma*.

For more information on activating Siebel workflows, see *Siebel Business Process Framework: Workflow Guide* .

Activating Workflows for Siebel Pharma

This system administration task describes how to activate the workflows required for Siebel Pharma. For more information on Siebel workflows, see *Siebel Business Process Framework: Workflow Guide* .

To activate workflows for Siebel Pharma

1. Navigate to the Administration - Business Process screen, then the Workflow Deployment view.
2. Query for Pharma* and activate all of the Pharma workflows.
3. Verify that each activated workflow is added to the Active Workflow Processes view.

Upgrading Workflows for Sample Transaction Management and Signature Capture in Siebel Open UI

This system administration task describes how to upgrade the workflows required for the Siebel Pharma sample transaction and electronic signature capture features.

To upgrade workflows for electronic signature capture

1. Make sure all of these Workflow Processes have been activated. For more information, see *Siebel Business Process Framework: Workflow Guide*
   - LS Pharma Sample Transaction Submit
   - LS Pharma Location Audit Submit
   - LS Pharma Interim Inventory Count
   - LS Pharma CloseOut Inventory Count
2. Navigate to the Administration – Runtime Events screen, then the Events view.
3. Click Menu (the cogwheel icon), and then select Reload Runtime Events from the drop-down list.
4. Restart the Siebel Server.

Setting Navigation Options

The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals* .

Administrative Setup Tasks for Siebel Pharma

The following information lists the administrative setup procedures that are specific to Siebel Pharma and procedures that might differ from those of the other Siebel Business Applications. The table also directs you to documentation containing information about each task.

When setting up your application, use the following table in combination with the main resource, *Siebel Applications Administration Guide* .

Administrative Task	Description	For More Information
Define medical specialties	• Defining medical specialties • Defining account specialties • Specifying a contact's primary specialty	*Managing Contacts in Life Sciences*
Set up bricks	• Defining bricks • Associating a brick with a contact address	*Managing Contacts in Life Sciences*
Define decision issues	• Defining decision issues	*Managing Contacts in Life Sciences* *Managing Products for Life Sciences*
Administer Smart Calls	• Creating a smart call template and making it available to end users	*Creating Smart Calls* *Managing Pharma Samples*
Specifying a Competitor	• Deleting an account • Creating or identifying a competitor	*Administering and Managing Accounts in Life Sciences* *Managing Contacts in Life Sciences* *Completing Contact and Account Call Activities*
Managing Accounts Contacts in Life Sciences	• Activating workflows for accounts contacts • Enabling server components for accounts contacts • Setting up targeting data for a new period • Activating new targeting data	*Managing Account Contacts in Life Sciences*

Administrative Task	Description	For More Information
	• Generating column maps for accounts contacts list • Creating product data to display in accounts contacts List	
Configuring Time Off Territory	• Configuring Time Off Territory approval process	*Tracking Time Off Territory*
Importing Data	• Importing data with EIM • Importing, extracting, and routing syndicated data • Charting denormalized syndicated data	*Importing Data into Life Sciences* *Siebel Pharma Developer's Reference*
Administering products	• Creating an external product • Creating an internal product or a market • Making a product inactive • Specifying additional product features • Entering information on related products • Associating related literature • Entering product comparison information • Creating a price list • Associating a price list with a product • Decision issues or product issues	*Managing Products for Life Sciences*
Configuring Siebel Pharma	• Targeting • Charting denormalized syndicated data • Modifying business component user properties • Changing read-only status of fields • MedEd special C++ classes • Submitting contact details from third-party applications	*Siebel Pharma Developer's Reference*
Configuring Data for Oracle Pharma Sales Analytics	• Transactional data requirements • Configuring product hierarchies and product costs • Configuring Product Catalog and Category Hierarchies • Setting Up Sales Objectives • Entering call activity data • Configuring sales territories for Oracle Pharma Sales Analytics • Creating target lists using Oracle Business Intelligence	*Configuring Data for Oracle Pharma Sales Analytics*

About 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.

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.

The following table lists the default setting of the Manager List Mode user property for some Siebel Life Sciences screens and business components.

Screen	Business Component	Manager List Mode
Accounts	Accounts	Inactive
Contacts	Contact	Inactive
MedEd	Pharma ME Event Professional Invitee	Active
Objectives	Objective	Active

Using Assignment Manager in Siebel Pharma

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* . For additional information on creating territories and running territory realignments, see *Siebel Territory Management Guide* .

This topic 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. The following table 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 Business Applications and currently conflicts with Siebel Life Sciences assignment rules. Siebel Life Sciences uses the assignment item type Industry SIC Code.

Assignment Object	Modifications
Account	The assignment criteria SIC Code has been renamed Account Class of Trade. Its assignment criteria are: • Account City State Country • Account Brick Account Brick source table has been changed to S_CON_ADDR and source column has been changed to BRICK_ID.
Contact	This assignment object was created specifically for Siebel Life Sciences and is not described in *Siebel Assignment Manager Administration Guide* . The assignment criteria are: • 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
Opportunity	Siebel Pharma includes the Product Line or Product Line Wildcard assignment criteria.

Contact Assignments in Siebel Life Sciences

In most Siebel Business Applications, assignment of contacts is based on primary address. This process is different for Siebel Life Sciences. A Siebel Life Sciences contact can have multiple addresses, and each representative on the contact's sales team can 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*.

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
  - The Direct field in the Accounts, Contact Affiliations view

  For more information, see *Indicating an Affiliation Between an Account and a Contact*.
- 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 activate 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, because 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".

Enforcing Siebel Life Sciences Activity Status Behavior in Other Siebel Applications

The following procedure shows you how to configure the Status field for Activity so that users will not be allowed to select any of the following values manually in the activity Status field.

- Signed
- Submitted
- Synchronized
- Signed and Synchronized

This is the default behavior in Siebel Life Sciences applications but you can enforce this Activity Status behavior in other Siebel Applications (such as Siebel Call Center) by completing the following procedure.

After completing the following procedure, if users try to select any of these values manually in the Status field for an activity, then an error message similar to the following appears:

- Error message example 1: *Wrong field values or value types detected in field Status. Please re-enter your field values. If you need additional assistance, please refer to the documentation. (SBL-UIF-00299)*
- Error message example 2: *Either the status value you have selected is not applicable to this activity type, or you must submit this activity using the Submit button. (SBL-SIS-00181)*

To enforce Siebel Life Sciences Activity Status Behavior in other applications

1. Navigate to the Business Component object type in the runtime repository.
2. Query for the Action Business Component, then go to Business Component User Prop.
3. Create the Pharma App Name user property, with the values shown in the following table.

   You must use this user property to define the list of comma-separated application names where users will not be allowed to change the activity Status field manually to Signed, Submitted, Synchronized, or Signed and Synchronized.

User Property Name	User Property Value

Pharma App Name	`<application name>,<application name>,<application name>`
	
	For example:
	
	`Siebel Universal Agent,Siebel Financial Services Mobile,Siebel Call Center`

4. Update the repository and deliver the updates.

5 Managing Contacts in Life Sciences

Managing Contacts in Life Sciences

This chapter covers managing contacts in Life Sciences. It includes the following topics:

- *About Managing Contacts in Life Sciences*
- *Scenario for Managing Contacts*
- *Process of Managing Contacts*

About Managing Contacts in 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 specialities, 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.

Scenario for Managing Contacts

This topic outlines an example process performed by a Siebel administrator and end users. Your company might follow a different process 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).

Sales representatives use Siebel Contacts to manually enter and modify contact information. They add information that helps them track relationships between contacts.

Sales representative 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.

Process of Managing Contacts

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

Administrator Procedures

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

- *Setting Up Primary Specialties*

  Define medical specialities within the system and specify a contact's primary speciality.
- *Removing Contact Records*
- *Administering Bricks*
- *Associating a Contact with a Brick*

End-User Procedures

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

- *Creating a Contact*.
- *Specifying the Best Time to Call*.
- *Indicating Affiliations Between Contacts*.
- *Indicating Affiliations Between a Contact and an Account*.
- *Viewing Pre-Call Information*.
- *Tracking Documentation Associated with a Contact*.
- *Other Tasks for Managing Contacts*. Enter contact category information and create contact assessments.

Setting Up Primary Specialties

As a Siebel administrator, you are responsible for defining and entering the primary specialty information about contacts.

The Primary Specialty field is read-only and can be edited only through EIM. The list of specialities is defined in the Administration - Application screen, Speciality view.

> **Note:** The Primary Specialty field is different from the Rep Specialty field on the Contacts screen. To create additional values for the Rep Specialty drop-down list, follow the procedures on modifying a list of values in the *Siebel Applications Administration Guide* .

This task is a step in *Process of Managing Contacts*.

Defining a Speciality

The following procedure shows you how to define a speciality.

To define a specialty

1. Navigate to the Administration - Application screen, then the Specialty view.

   The Primary Specialty view appears.
2. In the Primary Specialty list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Code	The Specialty Short Code for the health care provider's designated area of expertise. This is normally provided by the syndicated data provider (for example, AMA, IMS, or NDC).
Name	A full description of the health care provider's designated area of expertise.

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* .

Specifying Specialties for Contacts

The following procedure shows you how to specify specialties for contacts.

To specify specialties for Contacts

- Specialties cannot be specified for contacts through the UI. Specialties are loaded into the MED_SPEC_ID field in the S_CONTACT table of the database using EIM.
- Alternatively, configure the Primary Specialty field so that it can be edited.

Removing Contact Records

Three methods for removing contact records are described.

This task is a step in *Process of Managing Contacts*.

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 *Siebel Fundamentals* .

Removing Employees from a Contact's Team

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.

Deleting a Contact

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

> **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 might need 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. Navigate to the Contacts screen, then the Contact Administration view.

   The Contact Administration view appears.
2. In the Contacts list, select and then delete the appropriate contact.

   The contact is deleted from the list.

Administering Bricks

A brick is a collection of accounts and contacts, normally in a common geographic area. Bricks are sometimes referred to as geo zones. 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.

This task is a step in *Process of Managing Contacts*.

About Bricks in Siebel Pharma

As Siebel administrator, 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.

Siebel Pharma 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 contacts and account addresses. For information on associating a brick with an account address, see *Associating a Brick with an Account Address*.

Defining a Brick

This task describes how to define a brick.

To define a brick

1. Navigate to the Administration - Data screen, then the Brick Details view.
2. In the Bricks list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
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	Defines positions associated with the brick and controls visibility on the Analysis screen, then the Brick views. Note: For users to see the bricks for which they are responsible, the administrator must associate their position with those bricks.

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.

To associate a contact with a brick

1. Navigate to the Administration - Data screen, then the Brick Details view.
2. In the Bricks list, select a Brick.
3. In the Contact list, create a new record for the contact you want to associate with the brick.

Creating 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. The user

who creates the 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:** 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 behavior of displaying all contacts that are on the team of the subordinate person, create a service request (SR) on My Oracle Support. Alternatively, you can phone Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers remain the same and are listed on My Oracle 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 *Administering and Managing Accounts in Life Sciences*.

This task is a step in *Process of Managing Contacts*.

To create a contact record

1. Navigate to the Contacts screen, Contacts List, and then the More Info view.
2. In the Contacts form, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Address	A contact can have multiple addresses. Use the Addresses dialog box to select an existing address or create a new one. **Note:** Be careful when editing an existing address. Editing an existing address changes it for all contacts currently associated with the address. If you are unsure whether the change applies to all contacts, create a new address. 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. 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.
Brick	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. For more information, see *About Bricks in Siebel Pharma*, and *Associating a Contact with a Brick*.
Clinical	Indicates if this contact has been involved in a clinical trial.
Company Identifier	A unique identifier for the contact that can be used to cross reference with other systems.

Field	Comments
Consumer	Indicates if this contact is a customer.
Last Call Date	The date of the most recent call that has been submitted for each member of the team. In the My Contacts view, this field shows the last date that you, as the logged-in user, has made a call. In the other Contacts views, this field shows the last date the team's primary has made to the account.
License #	Used to record all contact's professional licenses.
Primary Specialty	Only Siebel administrators can define this value. For more information, see *Setting Up Primary Specialties* and *Setting Up Primary Specialties*.
Primary TOP	The physician's primary type of practice.
Provider	Indicates if this contact is a health care provider.
Rep Specialty	The specialty or area of expertise the end user sees this contact has having within their organization.
Rep TOP	The physician's primary type of practice according to the assigned sales representative.
Route	Allows users to select a when to visit an account from a predefined schedule. For more information, see *About Defining a Route Plan*.
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*.
Team	Multiple people can be assigned to the contact's team. The team member who created the record is indicated as primary.
Territory	Territories are assigned to contacts using Siebel Assignment Manager.
Type	Indicates the type of contact.

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*.

Specifying the Best Time to Call

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 about:

- Creating addresses, see the addresses field description in *Creating a Contact*.
- Using the PreCall view, see *Viewing Pre-Call Information*.

This task is a step in *Process of Managing Contacts*.

To specify the best time to call on a contact

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select a contact and drill down on the Last Name.
3. Click the Addresses tab.
4. In the Addresses list, select an address.
5. In the Best Times list, create a new 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.

This task is a step in *Process of Managing Contacts*.

To indicate an affiliation between contacts

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select a contact and drill down on the Last Name.
3. Click the Affiliations tab.
4. To specify a referring relationship, in the Affiliations list, create a new record and complete the necessary fields.
5. To specify an influencing relationship, in the Influenced list, create a new record and complete the necessary fields.

Indicating Affiliations Between a Contact and an Account

Using the Account Affiliations view, 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 *Completing Contact and Account Call Activities*

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

- **Specify a role for the affiliated contact.** This gives the end user some comprehension of the contact's occupation.
- **Specify the best times to call the contact at the affiliated account.** This makes sure that the contact is not called at inconvenient of inappropriate times.
- **Specify the role of the contact at the affiliated account.** This helps end users to track a contact's importance within an organization. They can then refer to this information prior to calls and adjust their discussions with each contact accordingly.
- **Review products in the formularies of the affiliated account.**

  If the contact is affiliated with any MCOs (MCOs), make sure to add the names of these to the Account Affiliations list.

  The Formulary Status list (LS Formulary Status List Applet) shows the drugs that are in the MCO account's formulary. This is read-only information. Formulary status can be updated from the Plan Formulary view of the Accounts screen.

  > **Note:** If a PBM (pharmacy benefit management company) owns the formulary, you need to affiliate the PBM account instead of the MCO account, in order to see the formulary.

This task is a step in *Process of Managing Contacts*.

To indicate an affiliation between a contact and an account

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select a contact and drill down on the Last Name.
3. Click the Account Affiliations tab.
4. In the Account Affiliations list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
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.
Direct	Select this field to route profile data for the contact to the members of the team assigned to the *affiliated account*. The Siebel administrator must enable this behavior. 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.)

5. To specify the role of the contact at the affiliated account, in the Roles list, create a new record and complete the necessary fields.
6. To specify the best time to call on the contact at the affiliated account, in the Best Times list, create a new record and complete the necessary fields.

Viewing Pre-Call Information

The Pre-Call view 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.

This task is a step in *Process of Managing Contacts*.

To view pre-call information

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select a contact and drill down on the Last Name.
3. Click the PreCall tab.

   The following table describes the list applets in the PreCall view.

List	Comments	Link Bar
Rx Trends	Syndicated data about prescription trends. Data can be viewed as a chart or as a list.	Rx Trend
Rx Trends By Plan	Syndicated data about prescription trends. Rx Trend by Plan shows prescriptions by managed care plans. Data can be viewed as a chart or as a list.	Rx Trend By Plan
Rx Trends By Formulary	Syndicated data about prescription trends. Rx Trend by Formulary shows prescription trends and formulary status information at affiliated accounts. Data can be viewed as a chart or as a list.	Rx Trend and Formulary
Account Affiliations	Lists all accounts affiliated with this contact. This list can also be populated from the Account Affiliation view. For more information, see *Indicating Affiliations Between a Contact and an Account*.	Rx Trend Rx Trend By Plan Rx Trend and Formulary
Best Times	Lists the best times to visit the contact. This list can also be populated in the Addresses view. For more information, see *Specifying the Best Time to Call*.	Rx Trend Rx Trend By Plan

List	Comments	Link Bar
		Rx Trend and Formulary
Calls	Features an historical list of all calls made on the contact.	Rx Trend Rx Trend By Plan Rx Trend and Formulary
Formulary status	Provides formulary status information for products in affiliated accounts.	Rx Trend Rx Trend By Plan Rx Trend and Formulary
Notes	Contains end-user notes regarding the selected contact.	Rx Trend Rx Trend By Plan Rx Trend and Formulary
Campaigns	Lists all the current campaigns targeted for the contact. Marketing Communications are not editable in this view. This list is populated from the Campaigns screen, and requires the Siebel Pharma Campaigns option. For more information, see about Creating Campaigns in the *Siebel Marketing User Guide* .	Marketing Communications
Messages	Lists all the offers associated with the campaign selected in Campaigns, as shown in this table.	Marketing Communications

4. To add information:
    a. Select the Calls, Best Times, Notes, or Account Affiliations lists.
    b. Create a new 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 might be associated with a contact and record significant dates, such as the date the document is sent, received, expected, or expires.

This task is a step in *Process of Managing Contacts*.

Adding an Attachment to a Contact

The following procedure show you how to add an attachment to a contact.

To add an attachment to a contact

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select a contact and drill down on the Last Name.
3. Click the Document Tracking tab.
4. In the Document Tracking list, create a new record and complete the necessary fields.

   Some fields 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.
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.

5. Select the record you just created and click the Attachments tab.
6. Create a new record and add the document as an attachment.

Tracking Documentation Associated With a Contact

The following procedure shows you how to track documentation associated with a contact.

To track documentation associated with a contact

1. Navigate to the Contacts screen, then the Contacts List.
2. In the Contacts list, select for whom you want to track documentation and drill down on the Last Name.
3. Click the Document Tracking tab.
4. In the Document Tracking list, query for the document of interest and complete the necessary fields.

Other Tasks for Managing Contacts

Other tasks associated with contacts are:

- **Creating contact assessments.** End users can use assessment templates to rate and rank contacts on key indicators. For example, sales representatives can use assessments to conduct primary market research during their sales calls. For information about creating assessment templates, see *Siebel Applications Administration Guide* . For information about performing assessments (contact assessments are performed the same way as account assessments), see *Siebel Applications Administration Guide* .
- **Creating category information.** End users can create public or private categories to track additional contact information, such as a particular sports a contact enjoys or food a contact prefers. For information about categories, see *Siebel Applications Administration Guide* .

6 Administering and Managing Accounts in Life Sciences

Administering and Managing Accounts in Life Sciences

This chapter covers administering and managing accounts in Life Sciences. It includes the following topics:

- *About Administering and Managing Accounts in Life Sciences*
- *About Account Hierarchies*
- *About Bricks*
- *Scenario for Accounts*
- *Process of Managing Accounts*
- *About Configuring the Generate Hierarchy Button*

About Administering and Managing Accounts in Life Sciences

An *account* is any healthcare business that generates sales for your company or potentially could generate business. Typical examples of accounts include hospitals, clinics, MCOs (managed care organizations), 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 *Scenario for Accounts*.

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, as well as the 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 might 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 *Administering Bricks*.

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.

In countries where physician-level prescription data is not available, brick data is a key measure of return on a pharmaceutical company's investment in sales promotion. In these markets, 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 Pharma

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 Pharma 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*.

Scenario for Accounts

This topic outlines an example process performed by a Siebel administrator and end users. Your company might follow a different process 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 enters new information about 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 enter 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).

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.

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.

Process of Managing Accounts

This topic details sample tasks often performed by administrators and sales representatives to record account calls. Your company might follow a different process according to its business requirements.

Administrator Procedures

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

- *Specifying a Competitor*.
- *Deleting an Account*.
- *Generating Account Hierarchies*. The account hierarchy lists accounts, child accounts and the activities, contacts and opportunities associated with all the accounts.
- *Associating a Brick with an Account Address*.

End-User Procedures

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

- *Creating an Account*.
- *Specifying an Account Profile*.
- *Viewing Account Hierarchies in Roll-up Views*.
- *Creating Category Information for an Account*.
- *Indicating an Affiliation Between an Account and a Contact*.
- *Indicating Affiliations Between Accounts*.
- *Creating Subaccounts*.
- *Viewing Pre-Call Information*.
- *Viewing Departments and Contacts*.
- *Tracking Documentation Associated with Accounts*. Representatives can review documentation associated with an account, the contacts responsible for each document and when reviews are due.

Specifying a Competitor

You enter competitors as accounts in Siebel Life Sciences, and with the Competitor field selected.

This task is a step in *Process of Managing Accounts*.

To specify an account as a competitor

1. Navigate to the Accounts screen, then the Accounts Administration view.
2. In the Accounts applet, create a new record and 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 *Creating an Account*. For more information on adding competitive product information, see *Managing Competitor Information*.

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.

This task is a step in *Process of Managing Accounts*.

To delete an account

1. Navigate to the Accounts screen, then the Accounts Administration view.
2. In the Accounts list, select and delete the account.

Generating Account Hierarchies

Data aggregation is available using 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 highest node of the hierarchy contains activities for the organization, the subsidiaries for 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.

This task is a step in *Process of Managing Accounts*.

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 about Global Accounts in the *Siebel Applications Administration Guide* .

When new accounts are created, 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. For information about configuring the Generate Hierarchy button, see *About Configuring the Generate Hierarchy Button*.

To generate a default account hierarchy

1. Navigate to the Accounts screen, then the Global Accounts Administration view.
2. In the Account Hierarchy 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 can 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. 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, Query for an account name (for example, A*) in the Account field.

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.

Custom 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 customer 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 custom account hierarchy of selected accounts

1. Navigate to the Account screen, then the Global Accounts Administration view.
2. In the Account Hierarchy List, create a new record and complete the necessary fields.

   Do not select the Default checkbox.
3. In the Account Relationships applet:

   a. Create new records for each of the high-level parent accounts. Leave the Parent Account field blank for each of these.
   b. Create new records for the child accounts, entering the Parent Account for each.
4. Associate the hierarchy with an organization. For information about assigning a custom hierarchy to an organization, see *Siebel Applications Administration Guide* .

End users can only see the account hierarchy with which their current position's primary organization is tied.

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.

This task is a step in *Process of Managing Accounts*.

To associate a brick with an existing account address

1. Verify that brick records have been set up.

   For information, see *Administering Bricks*.
2. Navigate to the Accounts screen, then the Account Administration view.
3. In the Accounts list, select an account.
4. In the Account form, click the multiple select button in the Addresses field to open the Account Addresses dialog box.
5. For a selected address, edit the Brick field.

Creating 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*.

Multiple employees can be assigned, as a team, to an account. Any employee assigned to the team can update the account's information. The user who creates the 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).

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.

This task is a step in *Process of Managing Accounts*.

To create an account

1. Navigate to the Accounts screen, then the Accounts List view.

2. In the Accounts List, create a new record and complete the necessary fields.

   Some fields 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	The account can have more than one address. One address must be specified as primary.
Brick	The brick (geographic area) code associated with the account's primary address.
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.

3. Drill down on the account record and click the More Info tab.
4. In the More Info form, complete the necessary fields.

   The More Info form is a dynamic applet. There are five dynamic form applets in addition to the default account profile form:

   - Hospital
   - Clinic
   - Pharmacy
   - Long Term Care
   - Managed Care

   The fields that appear are dependent on the account's Type field value.

Note: Only a Siebel administrator can delete an account. For more information, see *Deleting an Account*.

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 determines what fields appear in the Account Profile form.

This task is a step in *Process of Managing Accounts*.

To create an account profile information for an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts List, drill down on an account.
3. Click the Account Profile tab.

   > **Note:** The fields that appear in the Account Profile form depend on the Account Type field selected on the Account form. All fields in the Account Profile form are editable.

4. In the Account Profile form, complete the fields.

   You can track the best times to call on the account in the Best Times list.
5. In the Best Times list, review, create, or modify best time to call records.
6. In the Activities list, review or modify records or create general activities for 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 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 custom hierarchy), the hierarchy tree is not visible to the end user. Instead they see the following message: 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.

This task is a step in *Process of Managing Accounts*.

Viewing Aggregated Activities For an Account

The following procedure shows you how to view aggregated activities for an account.

To view aggregated activities for an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. Drill down on an account.

3. Click the Activities - Roll-up tab.

   The associated account hierarchy appears on 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 screen, then the Attachments view.
   - Drill down on an account name to navigate to the Account screen, then the 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.

Viewing the Aggregated Coverage Team For an Account Hierarchy

The following procedure shows you how to view the aggregated coverage team for an account hierarchy.

To view the aggregated coverage team for an account hierarchy

1. Navigate to the Accounts screen, then the Accounts List view.
2. Drill down on an account.
3. Click the Coverage Team-Roll-up tab.

   The associated account hierarchy appears on 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.

Viewing Aggregated Opportunities For an Account Hierarchy

The following procedure shows you how to view aggregated opportunities for an account hierarchy.

To view the aggregated opportunities for an account hierarchy

1. Navigate to the Accounts screen, then the Accounts List view.
2. Drill down on an account.
3. Click the Opportunities-Roll-up tab.

   The associated account hierarchy appears on 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 screen, then the Contacts view.

Viewing an Aggregated List of Contacts For an Account

The following procedure shows you how to view an aggregated list of contacts for an account.

To view an aggregated list of contacts for an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. Drill down on an account.
3. Click the Contact-Roll-up tab.

   The associated account hierarchy appears on 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 screen, then the Contacts view.
   - Drill down on an email address to open a blank email message addressed to the contact who has that address.

Creating Category Information for an Account

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.

This task is a step in *Process of Managing Accounts*.

To create category information for an account

- Follow the procedure for adding a category in the *Siebel Applications Administration Guide* .

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 *Completing Contact and Account Call Activities*.

> **Note:** The records for contacts you want to affiliate must already exist in Siebel CRM; you cannot create new contact in this view. For more information on creating contacts, see *Creating a Contact*.

This task is a step in *Process of Managing Accounts*.

To indicate an affiliation between an account and a contact

1. Navigate to the Accounts screen, then the Accounts List view.
2. Drill down on an account.
3. Click the Contact Affiliations tab.

4. In the Contact Affiliations list, create a new record and complete the necessary fields.

   Some fields 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 *affiliated account*. 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.

Creating a New Role For an Affiliated Contact

End users can track a contact's importance and influence level 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 create a new role for an affiliated contact

1. Affiliate an account with a contact as described in the previous procedure, *Indicating an Affiliation Between an Account and a Contact*.
2. Go to the Roles list, create a new 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 *Creating Subaccounts*.

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.** 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 list.** Indicates an affiliation in which the selected account is the object of the affiliation, such as an organization receiving referrals from another hospital.

This task is a step in *Process of Managing Accounts*.

To indicate an affiliation between accounts

1. Navigate to the Accounts screen, then the Accounts List view.

2. In the Accounts list, drill down on an account.
3. Click the Account Affiliations tab.
4. In Account Affiliations view, go to 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.
5. In the Upward or Peer Affiliations list or the Downward Affiliations list, create a new record and complete the necessary fields.

    > **Note:** If the relationship between the accounts is generic or unknown, add the record to the Upward or Peer Affiliations list.

    You can add more than one account at a time by selecting multiple accounts in the Add Accounts dialog box.

Viewing an Account's Upward and Downward Account Affiliations

The following procedure shows you how to view an account's upward and downward account affiliations.

To view an account's upward and downward account affiliations

1. Navigate to the Accounts screen, then the Explorer view.
2. Expand the account for which you want to view upward and downward affiliations.

Creating Subaccounts

Some accounts can have child accounts or subaccounts; for example, a hospital can have several departments or clinics. End users can create 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 Siebel CRM. In the Account Explorer view, however, a subaccount appears under its parent, reflecting the hierarchical relationship between the two.

The following table 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.

Access To	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*.

This task is a step in *Process of Managing Accounts*.

To create a subaccount

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts List, drill down on an account.
3. Click the Sub Accounts tab.
4. In the Sub Accounts list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

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.

   Adding a subaccount automatically adds a child record to the account hierarchy. For information about account hierarchies, see *Generating Account Hierarchies*.

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 account views.

Indicating an Affiliation Between a Contact and a Subaccount

The following procedure shows you how to indicate an affiliation between a contact and a subaccount.

To indicate an affiliation between a contact and a subaccount

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Sub Accounts tab.
4. In the Sub Accounts list, select a subaccount.

5. Go to the Contact Affiliations list, create a new record and complete the necessary fields.

   Some fields 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 *affiliated account*. 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.

6. Go to the Roles list, create a new record and complete the necessary fields.

Viewing Pre-Call Information

The Pre-Call view 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.

This task is a step in *Process of Managing Accounts*.

To view pre-call information

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Pre-Call 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. For more information, see *Indicating an Affiliation Between an Account and a Contact*.
Activities	Features a historical list of all activities associated with the account. For more information on working with activities, see *About Creating Activities*.

4. (Optional) Select the Contact Affiliations or Activities lists, create a new record and complete the necessary fields.

Viewing Departments and Contacts

Large hospitals can have a large number of doctors working in different medical departments within a hospital. Medical departments are generally organized around medical specialities. The Departments and Contacts view is a single view that allows end users to track the work department within the hospital where the contact performs his or her duties. Users can access this view prior to making a call to get familiar with the department of the contact they are about to visit.

An account can have multiple departments, but a department can belong to only one account. Departments are organized hierarchically within a hospital. A department can have one and only one parent department.

A contact can belong to multiple departments within a hospital. Membership to a child department does not define membership to any of the parent departments. However, membership to a child department does establish membership of the parent hospital Account.

This task is a step in *Process of Managing Accounts*.

Setting Up Departments and Contacts Information

The following procedure shows you how to set up departments and contacts information.

To set up departments and contacts information

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts List, create a new record for the Hospital Department, and select Department as the value for the Type field.
3. Click the Parent Account field and from the Pick Applet, select the Parent Account for the Department.
4. Click the Contact Affiliation detail tab.
5. In the List applet, click the New button, and open the Pick Applet on the Last Name field to associate a Contact to the Department.
6. Repeat Step 5 for other Contacts associated with the Department.

Viewing Departments and Contacts Information

The following procedure shows you how to view departments and contacts information.

To view departments and contacts information

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for the Parent Account and drill down on the Account record.
3. Click the Departments and Contacts detail tab.
   The Departments and their affiliated Contacts are displayed in the list.

Tracking Documentation Associated with Accounts

Clinical research associates can use the Document Tracking view to review and track documents associated with accounts.

This task is a step in *Process of Managing Accounts*.

To track documentation associated with an account

1. Navigate to the Account screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Document Tracking tab.
4. In the Document Tracking list, you can view, edit, create, and delete document records as required.

   Some fields 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*.

About Configuring the Generate Hierarchy Button

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 the Siebel runtime repository, 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 (default), 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 Developer's Reference* .

7 Managing Products for Life Sciences

Managing Products for Life Sciences

This chapter covers managing products for Life Sciences. It includes the following topics:

- *About Managing Products for Life Sciences*
- *How Siebel Life Sciences Stores Product Information*
- *Scenario for Managing Life Sciences Products*
- *Process of Managing Products*
- *Creating a Product Change Request*
- *Capturing Product Hierarchies for Siebel Medical*
- *Configuring Lot Numbers for Other Products*

About Managing Products for Life Sciences

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), medical equipment and devices, 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 *Scenario for Managing Life Sciences Products*.

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 (pharmaceutical) 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*.

> **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 *Making a Product Inactive*.

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 *Importing Data into Life Sciences*.

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*.

Scenario for Managing Life Sciences Products

This topic outlines an example process performed by a Siebel products administrator and end users. Your company might follow a different process according to its business requirements.

A medical devices 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 Siebel CRM, creates a price list, and then associates the new product with the price list. Next he enters new background information (called decision issues) that the home office wants to communicate to the field. Finally, he uses the capture hierarchy command to update the product hierarchy so the new product can be inventoried by the sales representatives who are using the Siebel Medical application.

Sales representatives use the Products screen to view product information and enter change requests.

Process of Managing Products

This topic details sample tasks often performed by administrators and end-users when managing products. In this scenario, the administrator is responsible for setting up products so that end users can view product information. Your company might follow a different process according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to set up product information:

- *Defining Internal Products*. Create a new product (called an internal product).
- *Specifying Additional Product Information*. Define product features and set up any product literature, entering additional product details including key features, information on related products, product comparison data, and associate literature.
- *Defining External Products*. Create any competitive and complementary products (called external products).
- *Adding Products to Catalogs*.
- *Defining Price Lists*. Define a price list and then associate it with the new product.
- *Defining Decision Issues*.
- *Capturing Product Hierarchies for Siebel Medical*. If you are using the Siebel Medial application, you must capture product hierarchies.

End-User Procedures

The following list shows tasks end users typically perform when viewing product information:

- *Viewing Product Information*.
- *Creating a Product Change Request*.

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*.

> **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*.

This task is a step in *Process of Managing Products*.

To create an external product

1. Navigate to the Administration - Product screen, then the External Products view.

2. In the External Products list, create a new record and complete the necessary fields.

   Some fields 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*.
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*.
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*.

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 the table in the topic *Product Categorization Settings* to categorize new products, or create market (therapeutic class) records.
- **Samples and promotional items settings.** Use the values described in the table in the topic *About Samples and Promotional Items Settings* to define samples and promotional items.

> **Note:** If you plan on tracking products using lot numbers, create lot numbers for samples. For more information, see *Defining Lot Numbers for Samples* or *Setting Up Lot Numbers for Medical Products*.

This task is a step in *Process of Managing Products*.

Product Categorization Settings

You categorize products or create market (therapeutic class) records using the Product Administration field values described in the following table. If the product will be tracked by lot number, you must specify additional settings, as described in *About Samples and Promotional Items 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
Competitive product. For more information, see *About the External Product Table*.	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

About Samples and Promotional Items Settings

The Food and Drug Administration (FDA) in the USA and similar agencies in other countries have regulations that stipulate that pharmaceutical samples disbursements must be tracked by lot number. However, it is not required that the actual samples inventory be tracked by lot number. Using the following table:

- 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 for Samples*.

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: • 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: • 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: • 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: • Samples disbursements tracked by product name • Samples inventory not tracked by product name No lot number tracking.	Null	Null	Null
Promotional-items	Full tracking by product name: • Promotional-items disbursements tracked by product name • Promotional-items inventory tracked by product name	Selected	Null	Null
Promotional-items	Partial tracking by product name: • Promotional-items disbursements tracked by product name • Promotional-items inventory not tracked by product name	Null	Null	Null

Creating an Internal Product or a Market

This task describes how to create an internal product or a market.

To create an internal product or a market

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Catalog #	Catalog number for a medical product.
Model #	Model number for a medical product.
Name	The name of the product, promotional item, or market (therapeutic class). 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*. 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).
Part #	The part number of this product. If a product image will be displayed on a Web site, do not include spaces or special characters in the part number.
Type	The type of product. For the recommended settings, see the table in the topic *Product Categorization Settings*. If this product also exists in the external product table, select Competitor so that the products will match up correctly.
Parent Product	The Parent Product is a multi-value group (MVG) that enables you to associate multiple parent product records. **Note:** In the Parent Product applet, you must select the Primary check box before you add the selected record as a parent product.

3. Click the Release button.
4. Drill down on the product.
5. Click the More Info tab.

6. In the form, click the show more button and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
1 Barcode	This field is for Siebel Medical Handheld. Indicates that the product is labeled with more than one barcode.
Approval #	The approval number for a medical product given by the approval organization.
Approval Org	The authority who has approved a medical product, for example TÜV.
Barcode	This field is for Siebel Medical Handheld. Indicates the standard for the product barcode.
Doses/Unit	This field is for Adverse Events and Complaints Management.
Expression	This field is for Siebel Medical Handheld. This expression is used to generate unique asset numbers from the product's barcode. It is a concatenation of the data descriptions for barcode items. For the example shown, if the expression is Lot Number, Serial Number, then the serial number and lot number portions of the barcode are the product's unique asset numbers. These barcodes are provided in the Administration - Mobile screen, then the Barcode Administration view.
Frequency	This field is for Adverse Events and Complaints Management. Indicates how many times during each day the product is used.
Leaf Level	This field is for Siebel Medical Handheld. It is computed when the Capture Hierarchy button is clicked, and indicates that the product has no children in the product hierarchy. Only leaf-level products are physical products—products that can be purchased and inventoried. Products that are not leaf-level represent groups of products. For example, the Helix 15 mm Stent is a leaf-level product in the Stent group of products.
Lot # Tracking	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:

Field	Comments
	○ You must define lot numbers for the product as described in the table in *About Samples and Promotional Items Settings*. For more information on defining lot numbers, see *Defining Lot Numbers for Samples*. ○ You should *not* check the Inventory field. This field is read-only if the Samples Lots Enabled system preference is set to FALSE. Only products of type Sample, Device, and Equipment can tracked by lot number. To use lot number tracking for products of other types, see *Configuring Lot Numbers for Other Products*.
Inventory	Applies to products that will be tracked in inventory by product name rather than by lot number. If you check this field, you should *not* check the Lot # Tracking field. For more information, see the table in the topic *Product Categorization Settings* and then the table in the topic *About Samples and Promotional Items Settings*.
Manufacturer	This field is for Adverse Events and Complaints Management.
Orderable	Select this field for any product or service that can be included in a samples order or in a sales order. For more information, see the table in the topic *Product Categorization Settings*.
OTC Product	This field is for Adverse Events and Complaints Management.
Parent Product	The parent products of this product within the product hierarchy. Products that are disbursed as samples should have a parent product. Parent products can be markets (therapeutic classes). **Note:** For Siebel Medical, only the primary parent is considered. Other parent products are ignored.
Pre-1938	This field is for Adverse Events and Complaints Management.
Level	Enter the appropriate value according to your product hierarchy. For the recommended setting, see the table in the topic *Product Categorization Settings*. If this product also exists in the external product table, enter 2 so that the products will be matched up correctly. In Siebel Medical, this field is set when the hierarchy is captured. For more information, see *Capturing Product Hierarchies for Siebel Medical*.
Requires Approval	This field is for Siebel Medical Handheld. If this box is selected and if the Requires Approval field is in the Inventory screen, then the Inventory Locations view is set to Product and then customer approval (signature capture) is required when this product is taken from the corresponding inventory.

Field	Comments
Rollup Level	This field is for Siebel Medical Handheld. It applies only to root-level products. (A root-level product is one that has no parent.) This field determines what levels of products are included in data rollup and also which levels of product appear in the inventories in Siebel Medical. For example, if Rollup Level is 3 for a product hierarchy that has six levels, the products at level 6, 5, 4, and 3 appear in the Medical inventories. The root product (level 1) and its immediate children (level 2) do not appear.
Root	This field is for Siebel Medical Handheld. It is computed when the Capture Hierarchy button is clicked. This field indicates root product (the oldest ancestor) of the product's hierarchy. For example, for a level-2 product, the Root field displays the product's parent.
Route Used	This field is for Adverse Events and Complaints Management.
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 the table in the topic *Product Categorization Settings*.
Short Days	This field is for Siebel Medical Handheld. An asset or lot for this product is short dated this many days before expiration. This field is also used by products of type Sample for similar functionality. Once a sample is short dated during a call execution, the pharmaceutical sales representative will be able to view the samples by default: which can help facilitate sample disbursing before expiry.
Therapeutic Class	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.
Unique Assets	This field is for Siebel Medical Handheld. Select this field to indicate that every instance of the product can be uniquely identified by a single field or by the concatenation of fields in the Expression field.
Unique Id	This field is for Siebel Medical Handheld. It must be unique to each product.

Field	Comments
	It is used to identify the product based on barcode data. It is the HIBC, UCC/EAN, or NDC number. It is used to map barcode data to the product.
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*.

Making a Product Inactive

This task describes how to make a product inactive.

To make a product inactive

1. Navigate to the Administration - Product screen, then the Products view.
2. Drill down on the product that you want to make inactive.
3. Click the More Info tab.
4. In the form, click the show more button and clear the following fields:
    - Product Level
    - Type
    - Lot # Tracking
    - Inventory
    - Orderable
    - Sales Product
    - Leaf Level

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 drilling down on the product in the Products list, and then adding either Product Recommendations or Product Collateral.

This task is a step in *Process of Managing Products*.

Specifying Product Recommendations

Using the Recommendations view you can add related products, and recommended cross-sell and up-sell products to the product record.

To add related products to a product record

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, drill down on the required product.
3. Click the Recommendations tab, then click the Related Products tab.
4. In the Related Products list, create a new record.
5. In the Add Internal Products dialog box, select a related product, and click OK.

   The related product is added to the list.
6. Complete the remaining fields, including indicating the Integration Status, Effective End Date, and whether or not the product can be ordered.

Specifying Product Collateral

Using the Collateral view you can specify additional product features and product comparisons, associate product literature and images with the product, or add product news to the product record.

Specifying Additional Product Features

This task describes how to create additional product features in the Collateral view.

To specify additional product features

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, drill down on the required product.
3. Click the Collateral tab, then click the Key Features tab.
4. In the Key Features list, create a new record and complete the necessary fields.

Adding Product Comparison Information

This task describes how to add product comparison information in the Collateral view.

To add product comparison information

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, drill down on the required product.
3. Click the Collateral tab, then click the Key Features.
4. In the Product Comparison list, create a new 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.

Associating Related Literature

This task describes how to associate related literature in the Collateral view.

To associate related literature

1. Navigate to the Administration - Product screen, then the Products view.

2. In the Products list, drill down on the required product.
3. Click the Collateral tab, then click the Literature tab.
4. In the Literature list, create a new 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.

   > **Note:** For more information on adding other selections to the Add Literature dialog box, see the chapter on literature administration in *Siebel Applications Administration Guide* .

Adding Images for a Product

This task describes how to add images for a product in the Collateral view.

To add images for a product

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, drill down on the required product.
3. Click the Collateral tab, then click the Images tab.
4. In the Images form, click the single select button in the Image File Name field.
5. In the Images dialog box, query for and select the required image.

   The image is added to the product record.

   > **Note:** For more information on adding other selections to the Pick Product News dialog box, see the chapter on literature administration in *Siebel Applications Administration Guide* .

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:

- Create 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)

This task is a step in *Process of Managing Products*.

Creating a Price List

This task describes how to create a price list in the Price List view.

To create a price list

1. Navigate to the Administration - Pricing screen, then the Price Lists, More Info view.
2. In the Price Lists list, create a new 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 Administration - Data, Currencies 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 Administration - Data, Orders, Payment Terms view.
Shipping Method	The shipping method for products associated with this price list.
Shipping Terms	The shipping terms for products associated with this price list.

3. Click the Price List Line Items tab.
4. In the Price List Line Items list, create a new 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*.

Associating a Price List with a Product

This task describes how to associate a price list with a product in the Price List view.

To associate a price list with a product

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, drill down on a product.
3. Click the Pricing tab, then click the Price Lists tab.
4. On the lower link bar, click Price Lists.
5. In the Price Lists list, create a new record and select the price list.

For more information on adding other selections to the Pick Price Lists dialog box, see *Defining Price Lists*.

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 *Siebel 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 topic describes how to administer information about competitors and competitive products.

Tracking competitor information inSiebel Life Sciences involves the following steps:

- Creating account records for competitors and selecting the Competitor field. For more information, see *Specifying a Competitor*.
- Creating records for competitors' products. For more information, see *Defining External Products*.
- Adding comparative and competitive literature files to the application. For more information, see the chapter on literature administration in *Siebel 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 *Defining Company Features* and *Defining Product Features*.
- Enter information about competitive products, product and company comparisons, and competitive and comparative literature. For more information, see the procedure *Entering Competitor Comparison Information*.

Defining Company Features

This task describes how to define company features in the Company Features Administration view.

To define company features

1. Navigate to the Competitors screen, then the Company Features Administration view.
2. In the Company Features list, create a new record and complete the necessary fields.

Defining Product Features

This task describes how to define product features in the Product Features view.

To define product features

1. Navigate to the Administration - Product screen, then the Product Features view.
2. In the Product Features list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Category	The category in which this product feature is classified.
Product Line	Select the product line of which this product is a part.
Name	The product feature criterion; for example, Once a Day Formulation.
Description	A description of the feature, if necessary.

Entering Competitor Comparison Information

This task describes how to enter competitor comparison information in the Competitor Administration view.

To enter competitor comparison information

1. Navigate to the Competitors screen, then the Competitor Administration view.

   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 creating competitors, see *Specifying a Competitor*.
2. In the Competitors list:
   - Select a competitor.
   - Optionally, enter the competitor's World Wide Web address (URL) in the Home Page field.
3. In the Company Comparison applet, create a new 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 *Defining Company Features*.
Rank	Enter the numeric rank of the feature as defined by your business process.

Defining Decision Issues

Contacts often raise important issues during a call. Decision issues are the objections a contact can 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 Decision Issues Administration view, you can:

- Create 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 topic, you must first add set up categories. (For general information about setting up categories, see *Siebel Order Management Guide* .)

This task is a step in *Process of Managing Products*.

To create a decision issue

1. Navigate to the Administration - Data screen, then the Decision Issues view.
2. In the Decision Issues list, create a new record and complete the necessary fields.
3. Click the Decision Issues Categories tab.
4. In the Categories list, create a new category record.

   The categories determine which users can see and select the decision issue. Users must have access to at least one of the categories in order to see the decision issue.
5. (Optional) Add literature to the decision issue:

   a. Click the Literature tab.
   b. Add literature records to the list.
6. (Optional) Add related issues to the decision issue:

   a. Click the Related Issues tab.
   b. Add decision issue records to the list.

      Only decisions issues that belong to categories to which you have visibility can be added.

Adding Products to Catalogs

When simple and complex products have been created, administrators must add catalog visibility to these products. 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. Product catalogs can be assigned to groups of people to control which users can access the products. By adding catalog visibility to products, you allow them to be accessed by different groups of people in your company.

You can further subdivide catalogs into product categories. For example, when you create a catalog, you might want to create a Catalog for cancer drugs and further subdivide this into categories with the same active ingredients.

When creating catalogs, you can also provide effective start and end dates for the categories associated with the catalog. This might be useful if you are providing particular products only at particular times in a clinical trial, for example.

To give a product catalog visibility, you must do the following:

- *Creating the Product Catalog*
- *Creating a Product Category*
- *Adding Products to Catalogs and Categories*
- *Adding Access Groups to Catalogs and Categories*

For more information about product catalogs and categories, see *Siebel Order Management Guide* .

For more information about access groups, see *Siebel Security Guide* .

This task is a step in *Process of Managing Products*.

Creating the Product Catalog

The following procedure details how to create a product catalog.

To create a product catalog

1. Navigate to the Administration - Product screen, then the Product Catalog list.
2. In the Product Catalog list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	The name of the new catalog.
Description	A description of the catalog.
Effective Start Date, Effective End Date	The date range between which the catalog is effective.
Private	Select this check box if you want the catalog to be visible only to users belonging to the access groups associated with it. If the catalog is private, all of its categories will also be private.
Active	Select this check box if the category is active.
Sequence	The sequence of this catalog in the list.

Creating a Product Category

You can further group products into product categories under catalogs.

To create a product category

1. Navigate to the Administration - Product screen, then the Product Catalog list.
2. In the Product Catalog list, query for and select the required catalog.
3. Drill down on the link in the Name field.

   The Categories view appears.
4. In the Categories list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	The name of the new category.
Display Name	The display name for the category in drop-down lists.

Field	Comments
Effective Start Date, Effective End Date	The date range between which the category is effective. It is important that you complete these fields, as these dates are checked when you create a quote line item for effective catalogs.
Usage	Choose the area in which the product will be used.
Sequence	The sequence of this category in the list.
Private	Select this check box if you want the category to be visible only to users belonging to the access groups associated with it. If the catalog is private, all of its subcategories will also be private.
Count	The total number of products in the category and all of its subcategories.

5. Create new product categories and subcategories as required, and indent the new categories under the original catalog to create a category hierarchy if required.

Adding Products to Catalogs and Categories

After you have created product catalogs and categories, you can add products to them.

To add products to catalogs and categories

1. Navigate to the Administration - Product screen, then the Product Catalog view.
2. In the Product Catalog list, query for and select the required catalog.
3. Drill down on the link in the Name field, and select the required category in the Categories list.
4. Click the Categories tab, and then click the Products tab.
5. In the Products list, create a new record.
   The Add Internal Products dialog box appears.
   a. Query for and select the required product in the Add Internal Products dialog box that appears, and then click OK.
      Most of the fields are populated when the product has been selected.
   b. If necessary, enter the sequence in which the products added are to be displayed.

Adding Access Groups to Catalogs and Categories

When you have added products to catalogs and categories, you can add access groups to make the products visible to the required groups of people.

Adding Access Groups to a Catalog

The following procedure shows you how to add access groups to a catalog.

To add access groups to a catalog

1. Navigate to the Administration - Product screen, then the Product Catalog view.
2. In the Product Catalog list, query for and select the required catalog.

3. Drill down on the link in the Name field, and then click the Access Groups tab.
4. In the Access Groups list, create a new record.

   The Add Access Groups dialog box appears.
5. Query for and select the required access group in the Add Access Groups dialog box that appears, and then click OK.

   The remaining fields are populated when the required access group is chosen.

Adding Access Groups to a Category

The following procedure shows you how to add access groups to a category.

To add access groups to a category

1. Navigate to the Administration - Product screen, then the Product Catalog list.
2. In the Product Catalog list, query for and select the required catalog.
3. Drill down on the link in the Name field, and expand the catalog name to select the required category in the Categories list.
4. Click the Categories tab, and then click the Access Groups tab.
5. In the Access Groups list, create a new record.

   The Add Access Groups dialog box appears.
6. Query for and select the required access group in the Add Access Groups dialog box that appears, and then click OK.

   The remaining fields are populated when the required access group is chosen.

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.

To view product information

1. Navigate to the Products screen, then the Internal Product List view.
2. In the Products list, drill down on a product.
3. Click any tab.

Creating a Product Change Request

End users who receive information about a product change request that has not already been entered in Siebel CRM, can create a product change request.

To create a product change request record

1. Navigate to the Products screen, then the Internal Product List view.
2. In the Products list, drill down on a product, and then click the Change Requests tab.

3. In the Change Requests list, create a new change request record.

   The Add Change Request dialog box appears.

   a. Select a change request in the Add Change Request dialog box that appears, and then click OK.

      The application adds a new record to the Change Requests list.
   b. Complete the following fields in the new change request record:

      - Enter a description in the Summary field.
      - Select the type of request in the Type field.
   c. Drill down on the Change Request hyperlink.

      The Change Request form appears.
   d. In the Change Request form, complete the necessary fields.

Capturing Product Hierarchies for Siebel Medical

To appear in the Siebel Medical inventory detail view, a product must belong to a product hierarchy that has been captured. The following procedure describes how to capture a product hierarchy.

Note: Remember to recapture the hierarchy after editing the relationships between products.

This task is a step in *Process of Managing Products*.

To capture a product's hierarchy

1. Navigate to the Administration - Product screen, then the Products view.
2. Select the root products whose hierarchies you want to capture.

   If you select a product that is not a root, that product is ignored. A dialog box lists these ignore records.
3. Click Capture Hierarchy.

   This prepares the product data so that it can be used by the Siebel Medical application to track inventory. It sets Root, Level, and Leaf Level fields based on the product relationships defined by the primary parent product.

Configuring Lot Numbers for Other Products

In the preconfigured application, only products of type Sample, Device, and Equipment can be tracked by lot numbers.

To activate lot number tracking for other types of product

- Use Siebel Web Tools to edit the Lot Tracking Product Types user property of the Internal Product business component.

  For information about the Lot Tracking Product Types user property, see the following table.

For more information on editing user properties, see *Configuring Siebel Business Applications* and *Using Siebel Tools* .

User Property Name	User Property Value	Description
Lot Tracking Product Types	`,ProductType1,ProductType2,ProductType3,...,` ProductType is the Language Independent Code (LIC) for the product type you want to track with lot numbers. Value must start and end with a comma and have no spaces between LICs. Example: ,Sample,Equipment,Device,	Enables lot tracking for specified product types.

8 Planning Calls

Planning Calls

This chapter covers planning calls in Siebel Life Sciences. It includes the following topics:

- *About Planning Calls*
- *Tools for Planning Calls*
- *Scenario 1: Users Create Target Lists*
- *Scenario 2: Users Define Route Plans*
- *Scenario 3: Users Create Activities*
- *Process of Planning Calls*
- *Creating a Contact Call*
- *Creating an Account Call*
- *Call Planning Features Specific to the Japanese Pharmaceutical Market*
- *Managing the PMS and Pre-Explain PMS Features*
- *Managing the PID Feature*

About Planning Calls

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 *Completing Contact and Account Call Activities*.

Using the procedures given in this chapter end users can create and apply target lists, define route plans, create activities, set up meetings, and schedule calls.

Tools for Planning Calls

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

- **Targeting.** For more information, see *Targeting*.
- **Routes.** For more information, see *Routes*.
- **Activities.** For more information, see *Activities*.

Targeting

Targeting using Global Target List Management 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 Siebel CRM. In Siebel Life Sciences, a target list can be a set of contacts or accounts and can be applied to any view that contains contacts or accounts.

Using the account and professional targeting list views in the List Management 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 scenario *Scenario 1: Users Create Target Lists* and *Creating and Applying Target Lists*.

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. 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 scenario *Scenario 2: Users Define Route Plans* and *About Defining a Route Plan*.

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 scenario *Scenario 3: Users Create Activities* and *About Creating Activities*.

All activities with valid dates and times appear in the 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 and Specialized Activity in the Calendar*.

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* and *Creating an Account Call*. For information on recording calls, see *Completing Contact and Account Call Activities*.

Gantt Chart for Contact and Account Calls

An account-contact call planning Gantt Chart has been introduced specifically for the Japanese market in an earlier version of the Siebel Life Sciences application. The same functionality is now available for account calls and contact calls. Sales representatives can use these views to quickly create calls in a given timeline. For more information about Gantt Charts, see *Planning Calls in the Call Planning Screens*.

Scenario 1: Users Create Target Lists

This scenario describes how end users use targeting to create lists of contacts and accounts. Your company might follow a different process according to its business requirements.

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 her contacts and accounts and creates target lists of the following information:

- Contacts located within specific postal 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 postal 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 postal 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 process for this scenario comprises two steps:

1. **Create and save a target list.** For more information, see *Creating and Applying Target Lists*.
2. **Apply target lists to other views.** For more information, see *Siebel Applications Administration Guide* .

Scenario 2: Users Define Route Plans

This topic illustrates how end users can use the Routes views to group accounts by location and then use that information to schedule calls. It also describes how sales managers can create routes and schedule calls for the sales representatives they manage.

Your company might follow a different process according to its business requirements.

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 process for this scenario comprises four procedures:

1. **Create a route.** For more information, see *Creating a Route*.
2. **Add accounts to a route.** For more information, see *Adding Accounts to Routes Using the Accounts View*.
3. **Schedule account visits using routes.** For more information, see *Using a Route to Schedule Calls*.

Scenario 3: 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. Your company might follow a different process according to its business requirements.

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 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 *Completing Contact and Account Call Activities*.

The process for this scenario comprises four procedures:

1. **Create general activities.** For more information, see *About Creating Activities*.
2. **Create contact or account call.** For more information, see *Creating a Contact Call* and *Creating an Account Call*.
3. **Set up a meeting.** For more information, see *Setting Up a Meeting*.

4. **View activities and create new activities on the Calendar screen.** For more information, see *Creating a General and Specialized Activity in the Calendar*.

Process of Planning Calls

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

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

- (Optional) *Scenario 1: Users Create Target Lists*. Using target lists users can query for accounts or contacts and then apply those lists to other views within the application.

  Creating and Applying Target Lists
- (Optional) *Scenario 2: Users Define Route Plans*. Route plans are groups of accounts sorted by location. Once created, users can use route information to schedule calls. See also the following topics:

  Review *About Defining a Route Plan*

  Creating a Route

  Adding Accounts to a Route

  Using a Route to Schedule Calls
- (Optional) *Scenario 3: Users Create Activities*. Activities allow users to manage their own time, keep their manager informed of their workload, and track expenses.

  Review *About Creating Activities*

  Creating a General Activity

  Creating a General and Specialized Activity in the Calendar

  Setting Up a Meeting
- *Creating a Contact Call*
- *Creating an Account Call*

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 application. A target list typically consists of contacts or accounts and can be applied to various views and dialog boxes that contain lists of contacts or accounts.

For general information about creating and applying target lists, see *Siebel Applications Administration Guide* .

This topic describes how to create target lists using the account and professional targeting list views, which are unique to theSiebel Life Sciences application. These views present data such as best times to call, and prescriber habits that sales representatives typically want to query when creating their contact and account target lists.

This task is a step in *Process of Planning Calls*.

To create a target list from the List Management screen

1. Navigate to one of the following views:

View	Navigate to the List Management screen then	To create lists of	Based on
Contact Profile	In the link bar, click Professional Targeting List.	Contacts	Rx consumption
Contact Attributes	In the link bar, click Professional Targeting List. In the visibility filter, select Account Attributes.	Contacts	Best times to call, ranking and rating
Account Profile	In the link bar, click Account Targeting List.	Accounts	Profile data such as number of physicians, call frequency, and market share
Account Attributes	In the link bar, click Account Targeting List. In the visibility filter, select Account Attributes.	Accounts	Best times to call and sales data

2. Run a query in the view.
3. Review the query results in the list.
4. When the list of contacts or accounts contains the records you want to save as a target list, click the Save Target List button.

   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 because data might have been modified or new contacts or accounts might have been added since you created the target list. For example, you must re-create your target lists after a territory realignment.

About 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 *Routes* and the scenario *Scenario 2: Users Define Route Plans*.

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

- **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 *Creating a Route*.

- **Add accounts to a route.** Once users have established a route, they can add accounts to it.
- **(Optional) Assign a target list to a route.** If users are using the Account Targeting features to create target lists, they can assign them to a route using the Target Accounts view.
- **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 *Using a Route to Schedule Calls*.

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

This task is a step in *Process of Planning Calls*.

To create a route

1. Navigate to the Routes screen.
2. In the Routes view, create a new 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 fields are described in the following table.

Field	Comments
Active	Select this field if the route is active and available for use in scheduling calls.
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.

Field	Comments
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. Three views are available for adding accounts to routes:

- **Accounts view.** Shows accounts associated with the selected routes. For more information, see *Adding Accounts to Routes Using the Accounts View*.
- **Explorer view.** Shows routes and accounts in a hierarchical format. For more information, see *Adding Accounts to Routes Using the Explorer View*.
- **Target Accounts view.** Shows all accounts and allows you to choose which you want to add to the selected route. For more information, see *Adding Accounts to Routes Using the Target Accounts View*.

This task is a step in *Process of Planning Calls*.

Adding Accounts to Routes Using the Accounts View

The following procedure shows you how to add accounts to a route using the Accounts tab.

To add accounts to a route using the Accounts view

1. Navigate to the Routes screen.
2. In the Routes list, drill down on a route.
3. Click the Accounts tab.
4. In the Accounts list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Account	Only accounts where the user is on the coverage team can be added.
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.

Field	Comments
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.

5. Repeat Step 4 until all accounts have been added to the Accounts list.

Adding Accounts to Routes Using the Explorer View

The following procedure shows you how to add accounts to a route using the Explorer view.

To add accounts to a route using the Explorer view

1. Navigate to the Routes screen.
2. In the Routes list, drill down on a route (in the Route Name field).
3. Click the Explorer tab.
4. In the Routes List explorer tree, do the following:
   a. Expand the Routes folder
   b. Under Routes, expand the route to which you want to add an account.
   c. Expand the Accounts folder under the route.

   A list of all the accounts assigned to the route appears.
5. In the Accounts list, create a new record for the account you want to add to the route and complete the necessary fields.

   Some fields 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.

6. Repeat Step 5 for each account you want to add.

Adding Accounts to Routes Using the Target Accounts View

The following procedure shows you how to add accounts to a route using the Target Accounts view.

To add accounts to a route using the Target Accounts view

Note: When associating a target 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 a target account with a route. However, there is no check to determine whether you or the owner of the route has access to the account.

1. Navigate to the Routes screen.
2. In the Routes list, drill down on a route (in the Route Name field).
3. Click the Target Accounts tab.
4. Select the accounts to add to the route.

   One way to select the accounts is to apply a target list and select the accounts in the list.
5. Click Commit.

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.

This task is a step in *Process of Planning Calls*.

To schedule calls from the My Routes view

1. Navigate to the Routes screen.
2. In the Routes list, click Schedule.
3. In the dialog box, enter a start date and click OK.

   Appointments for each account in the route are created in 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.

About Creating Activities

End users use general activities to manage their own time and keep their manager informed of their workload. 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.
- **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 *Completing Contact and Account Call Activities*
- **Meeting.**

  Used to track meetings, Designed to increase sales through product awareness. For more information, see *Setting Up a Meeting*.
- **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*
- **MedEd activity.**

  Used to track and plan medical education events such as “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 *Process of Managing MedEd Events*.

For more general information on activities, see *Activities* and *Scenario 3: Users Create Activities*.

> **Note:** End users also use the Call Activities screen to record and submit details of contact and account calls. For more information, see *Completing Contact and Account Call Activities*.

Creating a General Activity

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

This task is a step in *Process of Planning Calls*.

To create a general activity

1. Navigate to the Activities screen, then the Activity List view.
2. In the Activity List, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
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.
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 and Specialized 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 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.

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

This task is a step in *Process of Planning Calls*.

Creating General Activities in the Calendar View

To create a general activity in the Calendar view and to grant others access to your calendar, then follow the procedures for adding an activity to the calendar and granting access to your calendar in *Siebel Fundamentals Guide* .

Creating Specialized Activities in the Calendar View

The following procedure shows you how to create specialized activities in the calendar view.

To create specialized activities in the Calendar view

1. Navigate to the Activities screen, then the Activity List view.
2. Do one of the following:
   - 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.

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.

> **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 *Managing Pharma Medical Education Events*.

Setting up a meeting involves the following steps:

- **Create a new meeting record.** For more information, see *Creating a Meeting*.

  > **Note:** Users can also create a meeting by clicking the New Meeting button in the Activities list of the My Activities view.

- **Create activities for the meeting.** For more information, see *Creating a Meeting Activity*.
- **Add speakers for the meeting.** For more information, see *Adding a Meeting Speaker*.
- **Add invitees for the meeting.** For more information, see *Adding a Meeting Invitee*.

This task is a step in *Process of Planning Calls*.

Creating a Meeting

The following procedure shows you how to create a meeting.

To create a meeting

1. Navigate to the Activities screen, then the Activity List view.
2. In the Activities list, click New Meeting.
3. In the Meetings form, complete the necessary fields.
   Some fields 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 *Creating a Meeting Activity*. 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 *Adding a Meeting Invitee*.
Start Date	The application automatically populates this field with the date and time that the record was created. If needed, make additional changes.

Field	Comments
Status	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.

Creating a Meeting Activity

The following procedure shows you how to add activity information to a meeting.

To create a meeting activity

1. Navigate to the Activities screen, then the Meeting List view.
2. In the Activities list, do one of the following:
   - Create a new meeting. For more information, see *Creating a Meeting*.
   - Select an existing meeting and then drill-down on the Name field.
3. Click the Meeting Activities tab.
4. In the Meeting Activities list, create a new record and complete the necessary fields.

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 create for a meeting are child records of the meeting. These records appear in the Meeting Activities tab view and as activities in the Calendar views.

Adding a Meeting Speaker

The following procedure shows you how to add speaker information to a meeting.

To add a meeting speaker

1. Navigate to the Activities screen, then the Meeting List view.
2. In the Activities list, do one of the following:
   - Create a new meeting. For more information, see *Creating a Meeting*.
   - Select an existing meeting and then drill-down on the Name field.
3. Click the Meeting Speakers tab.
4. In the Meeting Speakers list, create a new record and complete the necessary fields.

   Affiliated contacts are those associated with the account (if any) specified in Step 3 in the topic *Creating a Meeting*. For more information, see *Indicating an Affiliation Between an Account and a Contact*.

Adding a Meeting Invitee

The following procedure shows you how to add invitee information to a meeting.

To add a meeting invitee

1. Navigate to the Activities screen, then the Meeting List view.
2. In the Activities list, do one of the following:
   - Create a new meeting. For more information, see *Creating a Meeting*.
   - Select an existing meeting and then drill-down on the Name field.
3. Click the Meeting Invitees tab.
4. In the Meeting Invitees list, create a new record and complete the necessary fields.

Updating the Cost Field in the Meeting Invitees 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 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 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 and Submitting Contact Calls*.

This topic presents four different methods of creating contact calls:

- *Creating a Contact Call from the Activities Screen*
- *Automatically Scheduling a Contact Call Using Auto Schedule*
- *Manually Scheduling a Contact Call from the Contacts Screen*
- *Scheduling a Contact Call in the Calendar*

This task is a step in *Process of Planning Calls*.

Creating a Contact Call from the Activities Screen

This task describes how to create a contact call from the Activities screen.

To create a contact call from the Activities screen

1. Navigate to the Activities screen, then the Activities List view.
2. In the Activities list, click New Contact Call.
3. In the Contact Call form, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Last Name	The contact to be visited during this call.
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 *Managing Pharma Samples*.
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 Contact Call Detail view. For more information on Smart Calls, see *Creating Smart Calls*.
Status	The status of this call. The default value is Planned. This value changes to Synchronized after synchronization. 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 *Recording and Submitting Contact Calls*.

For more information on how to enter information in Call Products Detailed, Sample Products Dropped, Promotional Items Dropped, and Issues lists, see *Recording and Submitting Contact Calls*.

> **Note:** If you applied a Smart Call to the call (as described in Step 3 in the topic *Creating a Contact Call from the Activities Screen*), you only need to verify that all the information in the four lists is accurate.

Automatically Scheduling a Contact Call Using Auto Schedule

This task describes how to automatically schedule a contact call from the Contacts screen. When you use the schedule button to create calls, the auto-scheduling function:

- Tries to schedule a call at a best time for each contact at their primary address.
- Schedules a call even if it does not find a best time

- Distributes the calls over the time period (For example, if you select 10 contacts to be scheduled over a 5-day week, two calls during each day are scheduled.)

To automatically schedule a contact call using Auto Schedule

1. Navigate to the Contacts screen, then the Contacts List view.
2. In the Contacts list, select one or more contacts.
3. Click Schedule.
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 must verify that automatically scheduled calls do not conflict with other activities in their calendar.

Manually Scheduling a Contact Call from the Contacts Screen

This task describes how to manually schedule a contact call from the Contacts screen.

To manually schedule a contact call in the Calls view

1. Navigate to the Contacts screen, then the Contacts List view.
2. Drill down on a contact.
3. Click the Calls tab.
4. In the Call list, create a new 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 *Recording and Submitting Contact Calls*.

5. 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 and Submitting Contact Calls*.

Scheduling a Contact Call in the Calendar

This topic explains how to schedule a contact call in the Calendar.

To schedule a contact call in the Calendar

1. Navigate to the Calendar screen, then the Calendar view.
2. Select either the Daily or Weekly tab.
3. 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 and Submitting Contact Calls*.

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 and Submitting Contact Calls*.

This topic presents five different methods of creating account calls:

- *Creating an Account Call From the Activities Screen*
- *Automatically Scheduling an Account Call Using the Schedule Button*
- *Manually Scheduling an Account Call in the Accounts View*
- *Creating an Account Call Using the New Call Button*
- *Scheduling an Account Call in the Calendar*

This task is a step in *Process of Planning Calls*.

Creating an Account Call From the Activities Screen

This task describes how to create an account call from the Activities screen.

To create an account call from the Activities screen

1. Navigate to the Activities screen, then the Activity List view.
2. In the Activities list, click New Acct Call.
3. In the Account Call form, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Account	The account to be visited during this call.
Smart Call	The Smart Call template to be associated with this call. 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 *Creating Smart Calls*
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 *Recording and Submitting Account Calls*.

For information on how to enter information in the Call Products Detailed, Attendees, and Activities lists, see *Recording and Submitting Account Calls*.

Note: If you applied a Smart Call to the call (as described in Step 3 in *Creating a Contact Call from the Activities Screen*), you only need to verify that all the information in the four lists is accurate.

Automatically Scheduling an Account Call Using the Schedule Button

This task describes how to automatically schedule an account call using the Schedule button.

To automatically schedule an account call using the Schedule button

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, select an account and click Schedule.
3. 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 must verify that automatically scheduled calls do not conflict with other activities in their calendar.

Manually Scheduling an Account Call in the Accounts View

This task describes how to manually schedule an account call in the Accounts view.

To manually schedule an account call in the Account view

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Calls tab.
4. In the Calls list, create a new 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 *Recording and Submitting Account Calls*.

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 and Submitting Account Calls*.

Creating an Account Call Using the New Call Button

This task describes how to create an account call using the New Call button.

To create an account call using the New Call button

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Go to the More Info tab and 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 and Submitting Account Calls*.

Scheduling an Account Call in the Calendar

This task describes how to schedule an account call in the Calendar.

To schedule an account call in the Calendar

1. Navigate to the Calendar screen, then the Calendar view.
2. Select either the Daily or Weekly tab.
3. 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 and Submitting Account Calls*.

Call Planning Features Specific to the Japanese Pharmaceutical Market

The Japanese pharmaceutical market has some unique characteristics concerning patient safety as stipulated by government regulations. These market characteristics dictate how sales representatives engage with physicians and hospitals in their territories and how they plan future calls. For example, pharmaceutical companies must provide safety information about a product to a physician. Additionally, after a new product is released, sales representatives are required to meet with physicians at pre-determined intervals to gather information about any anomalous effects the product may be having on the patients.

> **Note:** Features specific to the Accounts Contacts in the Japanese pharmaceutical market are not covered in this section. For information about Accounts Contacts features specific to the Japanese market, see *About Japanese Pharmaceutical Market Features*.

The following Siebel Life Sciences features address the distinctive traits of the Japanese pharmaceutical market:

- **Post Market Surveillance (PMS).** The purpose of the PMS process is to encourage feedback relating to adverse effects that may have been noted in patients taking new drugs to be reported back to the drug company. When a drug is approved, sales representatives must visit each institution that purchases the drug. As stipulated by government regulation, these visits must occur every 2 weeks for the first 2 months after a hospital purchases the drug, and monthly thereafter for a period of 6 months after the launch date of the drug.

For a specific example of how calls are scheduled for PMS after a product is released, see *Visit Timeline During the PMS Period*.

The purpose of these visits is to remind the health care professionals of their obligations to report any adverse effects that they have observed, or that have been reported to them. This process is initiated only when a hospital (account) purchases a drug (product) for the first time. This an activity associated at the account level. For information about managing PMS, see *Managing the PMS and Pre-Explain PMS Features*.

- **Pre-Explain PMS.** A process that is a precursor to the PMS process. This process is triggered when a new hospital (account) is targeted for a drug (product). Using the Pre-Explain PMS feature will automatically set up a call for each hospital. The goal of the ensuing call is for the sales representative to explain to the hospital (account) contact how the PMS process will work. The Pre-Explain PMS typically occurs before any hospital (account) purchases a new drug (product). For information about managing Pre-Explain PMS, see *Managing the PMS and Pre-Explain PMS Features*.
- **Package Insert Delivery (PID).** Pharmaceutical companies are required to offer safety information about a drug (product). This safety information is called a package insert. Its purpose is to improve the doctor's recognition of the product, and protect patient safety in accordance with Japanese government regulations. Pharmaceutical companies are required to monitor whether their representatives are carrying out these calls whenever a package insert is updated for a product. After a modified package insert is delivered and the call has been made to the hospital contact, the sales representative is responsible for recording the call as having been completed. For information about managing PID, see *Managing the PID Feature*.

Visit Timeline During the PMS Period

As stipulated by Japanese government regulation, sales representatives from pharmaceutical companies must visit hospitals at preset intervals for six months after a drug is launched. These visits must occur every two weeks for the first two months after a hospital purchases the drug, and monthly thereafter for a total period of six months after the launch date of the drug.

For example, Drug XYZ is launched on February 1, 2009. The PMS period will also begin on February 1, 2009. The PMS period will end for Drug XYZ six months after its release: on August 1, 2009.

Hospital 1 buys Drug XYZ on February 1, 2009. This means that they will have the maximum amount of PMS visits from the pharmaceutical company. There will be a total of eight visits that will occur approximately on the following dates:

- Biweekly dates: February 15th, March 1st, March 15th, April 1st
- Monthly dates: May 1st, June 1st, July 1st, August 1st

Hospital 2 buys Drug XYZ on April 1, 2009. As a result, there will be a total of six PMS visits that will occur approximately on the following dates:

- Biweekly dates: April 15th, May 1st, May 15th, June 1st
- Monthly dates: July 1st, August 1st

Hospital 4 buys Drug XYZ on July 15, 2009. As a result, there will be a total of one PMS visit that will occur approximately on the following date:

- Biweekly date: August 1st

Note: Once six months have elapsed after the launch date, there are no more PMS calls.

Managing the PMS and Pre-Explain PMS Features

After a drug is released in the Japanese market, a series of follow-up calls must be scheduled with hospitals purchasing the drug in order to track any possible side effects. Although users can create and display account calls on the Accounts screen, calls can be created for this purpose using the PMS and Pre-Explain PMS features. For more information about PMS and Pre-Explain PMS, see *Call Planning Features Specific to the Japanese Pharmaceutical Market*.

This topic presents different tasks involved for creating account calls relating to PMS and Pre-Explain PMS:

- *Enabling a Product for PMS*
- *Scheduling Calls for Pre-Explain PMS*
- *Scheduling Calls for PMS*
- *Viewing or Editing PMS Account Products*
- *Viewing Upcoming Pre-Explain PMS and PMS Callsfor All Accounts*
- *Viewing All Missed Calls for Account Contacts*
- *Viewing All Account and Contact Level Attachments for a PMS Call*

Enabling a Product for PMS

The following procedure describes how to enable a product for PMS.

To enable a product for PMS

1. Navigate to the Administration - Products screen, then the Products view.
2. Select a product.
3. Define a date in the Period Start Date column.

   Note: The date should be the product's launch date.

4. Define a date in the Period End Date column.

Note: The date should be six months after product's launch date.

Scheduling Calls for Pre-Explain PMS

The following procedure describes how to schedule calls for Pre-Explain PMS.

To schedule calls for Pre-Explain PMS

1. Navigate to the Administration - Products screen, then the Schedule PMS Activities view.
2. Select a product.
3. Select an account list.
4. Enter a value for Due Date.
5. Click Pre PMS Call.

A Pre-Explain PMS call will be scheduled for each hospital in list of Accounts.

Scheduling Calls for PMS

The following procedure describes how to schedule calls for PMS.

To schedule calls for PMS

1. Navigate to the Administration - Products screen, then the Schedule PMS Activities view.
2. Select a product.
3. Select an account list.
4. Enter a value for Due Date.
5. Click PMS Call.

A series of follow-up calls will be scheduled for each hospital in list of Accounts.

Note: Depending on the defined PMS period, each hospital may have up to eight follow-up calls scheduled. These are out-of-the-box default values.

Viewing or Editing PMS Account Products

The following procedure describes how to view or edit PMS Account Products.

To view or edit PMS Account Products

1. Navigate to the Administration - Product screen, then the PMS Account Product view.

   All products set up for Pre-Explain PMS and PMS will appear in this view.
2. Select a product.
3. Modify any of the fields.

Viewing Upcoming Pre-Explain PMS and PMS Calls for All Accounts

The following procedure describes how to view all upcoming Pre-Explain PMS and PMS calls for all accounts.

To view all upcoming Pre-Explain PMS and PMS calls for all accounts

1. Navigate to the Calendar screen, then the Account Call Planning view.
2. Select an account.
3. Navigate to past calls or future calls as required.

   Different types of calls are denoted by different blocks of color, according to the legend specified in the Account Call Planning view

Note: PMS calls for all accounts appear on the Home screen.

Viewing All Missed Calls for Account Contacts

The following procedure describes how to view all missed calls for account contacts:

To view all missed calls for account contacts

1. Navigate to the Home screen.
2. Go to the Missed Calls section.

Viewing All Account and Contact Level Attachments for a PMS Call

The following procedure describes how to view all account and contact level attachments for a PMS call.

To view all account and contact level attachments for a PMS call

1. Navigate to the Post Market Surveillance screen, then the Activity Details view.
2. Select a PMS account product.
3. Go to the end of the view.

   The Account Attachment section will list any account-level attachments, and the Contact Attachment section will list any contact-level attachments.

Managing the PID Feature

After pharmaceutical companies modify safety information in a package insert for a drug in the Japanese market, a call must be scheduled with all the hospitals distributing the drug. Although users can create and display account calls on the Accounts screen, calls can be created for this purpose using the PID feature. For more information about PID, see *Call Planning Features Specific to the Japanese Pharmaceutical Market*.

This topic presents different tasks involved for creating account calls relating to PID:

- *Creating a Package Insert*
- *Scheduling a Call for PID*
- *Viewing All Upcoming PID Calls for All Accounts*

Creating a Package Insert

The following procedure describes how to create a package insert:

To create a package insert

1. Create a product for the package insert.
   While creating the package insert, ensure that the following fields are set:
   - Effective Start Date
     Note: The value given to Effective Start Date should represent the issue date for the product.
   - Item Size
     Note: The value given to the Item Size field should reflect the number of pages in the package insert.
   - Type
     Note: The Type field must be set to Insert.

   For more information about creating products, see *Process of Managing Products*.
2. Click the Release button.
3. Add visibility through the category. For more information about product categorization, see *Product Categorization Settings*.

Scheduling a Call for PID

The following procedure describes how to schedule a call for PID.

To schedule a call for PID

1. Navigate to the Administration - Products screen, then the Schedule PID Activities view.
2. Select the product insert from the list of products.
3. Select an account list.
4. Enter a value for Due Date.
5. Click PID Calls.
   A series of calls will be scheduled for each hospital in the list of accounts.

Viewing All Upcoming PID Calls for All Accounts

The following procedure describes how to view all upcoming PID calls for all accounts.

To view all upcoming PID calls for all accounts

1. Navigate to the Calendar screen, then the Account Call Planning view.
2. Select an account.
3. Navigate to past calls or future calls as required.
   Different types of calls are denoted by different blocks of color, according to the legend specified in the Account Call Planning view.

Note: PID calls for all accounts appear on the Home screen.

9 Completing Contact and Account Call Activities

Completing Contact and Account Call Activities

This chapter covers contact and account call activities, samples disbursement, inventory counts, and electronic signature capture. It includes the following topics:

- *About Contact and Account Call Activities*
- *Transaction Processing for Call Activities*
- *About Electronic Signature Capture*
- *Scenario for Completing Call Activities*
- *Process of Completing Call Activities*
- *Remaking Electronic Signatures*
- *Configuring the New Call Button*
- *Configuring the Submit Button*
- *Configuring Signature Capture*
- *Rendering Signatures in the UI*
- *Marking Package Insert Delivery and Post Market Surveillance Calls as Complete*

About Contact and Account Call Activities

This chapter describes how to record account and contact calls in Siebel Life Sciences. For more information on planning account and contact calls, see *Planning Calls*.

Using the procedures in this chapter, you can perform the end-user tasks of recording contact and account calls such as adding information about products detailed, capturing signatures electronically, and submitting calls.

If you are using Siebel Pharma Campaigns, you can record contacts responses to campaign offers to achieve closed-loop marketing.

Contact and account calls are both types of activity records. Although you can create contact and account calls in the Contacts and Accounts screens, you can only record the details of calls in the Call Activities screen.

Transaction Processing for Call Activities

This topic covers transaction processing for contact and account call activities. Clicking the Submit button on Pharma call activity views causes a number of important events to occur within the application. The following table describes the specific actions that occur when clicking the Submit button on each listed Pharma view.

View	Access Path	Transaction Type	Clicking the Submit button...
Contact Call Detail	Call Activities screen, then the Contact Call Detail view	Disbursement	Changes the contact call detail Status field to Submitted. Except for the Comment field, sets the record to read-only. Sets all child records to read-only. **Note:** The Disburse on Signature Capture system parameter is set to TRUE by default. This means that when the user clicks the Save button on Signature Capture view, the application decrements the inventory count for Samples Dropped only. For Promotional Items Dropped, transaction records are generated upon submitting the call. If samples were dropped, and the Disburse on Signature Capture system parameter is set to FALSE, then clicking the Submit button creates a Samples Transaction History record.
Account Call Detail	Call Activities screen, then the Account Call Detail view	Disbursement	Changes the account call detail Status field to Submitted. Except for the Comment field, sets the record to read-only. Sets all child records to read-only. If the Disburse on Signature Capture system parameter is set to TRUE, the application decrements the inventory count for Samples Dropped only when the user clicks the Save button on Signature Capture view. If samples were dropped, clicking the Submit button creates a Samples Transaction History record only if the Disburse on Signature Capture system parameter is set to FALSE.
Received Samples	Samples screen, Transaction, and then the Received Samples view	Transfer In if the approval flow is enabled. Otherwise, the status changes to Processed.	Updates the user inventory to reflect the quantity entered in Received Quantity field of the Line Items list. Updates Sample Invoices by setting the Active flag to N (No). If the Invoice Status is processed, the application updates the Line Items list by: • Setting the Stock Update flag to Y (Yes) • Updates the Stock Position ID • Changes the Item Status to Submitted **Note:** A dialog box displays if Acknowledged Qty is not equal to the Shipped Qty. You can close the transaction with discrepancy, or keep the transaction open with partial received. A notification is created for both the sender and the reviewer when the transaction status is Processed with Discrepancies.

View	Access Path	Transaction Type	Clicking the Submit button...
Admin view: Sample Order	Sample Order Management screen, then the Samples Orders view	Sample Order	Updates the Samples Orders list by setting the Active flag to N (No). If the Order Status is submitted, the application updates the Line Items list by: • Setting the Stock Update flag to Y (Yes) • Updates the Stock Position ID • Changes the Item Status to Submitted **Note:** The Process and Reject buttons are enabled for Sample Order submitted by the user. Click the Process button to generate a Sample Send transaction with information copy form the request. Only items that exist in the administrator's inventory is added to the generated transaction.
Inventory Adjustments	Samples screen, Transaction, and then the Inventory Adjustments view	Inventory Adjustment	Updates the user inventory to reflect the quantity entered in Quantity field of the Line Items list. Updates Sample Adjustments by changing the Active flag to N (No). If the Transfer Status is Submitted, the application updates Line Items list by: • Setting the Stock Update flag to Y (Yes) • Updating the Stock Position ID • Changing the Item Status to Submitted **Note:** The status of the original transaction changes to Adjusted and excluded from the inventory count. The Adjust Transaction status changes to Processed.
Sent Samples	Samples screen, Transaction, and then the Sent Samples view	Transfer Out	Updates the user inventory to reflect the quantity entered in Line Items list Quantity field. Updates My Sent Samples by setting the Active Flag to N (No), Changes the Status to Submitted. If the Transfer Status is Processed, the application updates the Line Items list by: • Setting the Update Flag to Y (Yes) • Updating the Stock Position ID • Changing the Item Status to Submitted **Note:** A corresponding Received Samples transaction is created for the receiver.

Note: For all sample transactions, the status changes to Processed if approval is not required.

When a user clicks the Submit button in either the Contact Call Detail or 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 *Siebel Pharma Developer's Reference*.
- 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.

The application checks if dropped samples are recorded for the call:

- 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.
- The Ref # field is not empty (paper signature only).

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.

  > **Note:** If the Disburse on Signature Capture system parameter is set to TRUE, the application decrements the inventory count for Samples Dropped only when the user clicks the Save button on Signature Capture view.

- 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 the Siebel Mobile application for Siebel Pharma on a mobile device). For information, see *Siebel Pharma Developer's Reference*

  > **Note:** If attendees are recorded in an account call, an attendee call is created for each attendee, and the previous process described 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.

About Electronic Signature Capture

Users can capture signatures for samples disbursement within Siebel Pharma running on a mobile client. End users can capture signatures directly on the screen for samples dropped to qualified contacts.

> **Note:** Electronic signature capture is enabled for Siebel Mobile Web Clients only; it is not enabled on Siebel Web Clients connected to the Siebel Server.

For information about configuring logic behind the Sign button and the appearance of the LS Pharma Call Signature Form Applet, see *Configuring Signature Capture*.

Electronic signature capture is supported on mobile devices such as tablets and smartphones. For more information, see the Siebel Mobile Guides on *Siebel Bookshelf* .

Note: For Siebel CRM product releases 8.1.1.9 and later and for 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certification tab on My Oracle Support.

Scenario for Completing Call Activities

This topic outlines an example process performed by end users when recording contact and account calls. Your company might follow a different process according to its business requirements. A sales representative for a pharmaceutical company has a busy day of calls to both individual physicians and to accounts.

Recording Call Information

As he makes calls, the sales representative records the information about the call. He records information relating to samples delivered to the physicians during the call, including details such as the lot number and the quantity.

The sales representative records information about the products discussed and the indications for which the products were promoted. The representative also delivers promotional items, a coffee mug and some memo pads, which he also records as part of the call information. He logs the issues that the contact raised during the call so he can follow up on them prior to his next visit.

Obtaining Signatures for Dropped Samples

This sales representative is using the electronic signature capture: the physician acknowledges receipt of dropped samples by using a stylus to sign directly on screen, and the signature is recorded in the Pharma application. (Alternatively, sales representatives can collect paper signatures and record a reference number for the paper signature in the Pharma application.)

Delivering Marketing Messages and Recording the Contact's Response

Some of the physicians he visits have been targeted in specific marketing campaigns. Information about these campaigns appears automatically in the appropriate contact call records—this reminds the sales representative to deliver the marketing messages. The sales representative enters the physicians' responses to the messages.

(The response information is later reviewed by the marketing manager; she uses the information for refining segmentation and targeting.)

Submitting the Call

After making sure that all data about the call is correctly entered, the sales representative submits the calls. This changes most fields to read-only so that the call records cannot be accidentally changed or tampered with.

In the Event of a Mistake, Remaking Electronic Signatures

Unfortunately, after submitting the final account call, the sales representative realizes that the two doctors attending the call mistakenly signed for each other's samples. The next day, the sales representative returns to the account and the doctors sign again for their samples.

Process of Completing Call Activities

This example process represents the tasks that are carried out in the *Scenario for Completing Call Activities*. Your company might follow a different process according to its business requirements.

1. *Recording Marketing Responses in Contact Calls*. (Requires Siebel Pharma Campaigns.)
2. *Recording and Submitting Contact Calls*.
3. *Recording a Contact Call for a Different Contact at the Time of Signature Capture*.
4. *Remaking Electronic Signatures*. If you are using electronic signature capture and you discover after submitting a call that a professional signed the wrong receipt, you can re-create the receipt.

Recording Marketing Responses in Contact Calls

If your license includes Siebel Pharma Campaigns, information about the contact's response to campaign offers can be recorded for the contact call, through the Contact Call Detail - Marketing view.

Campaign offers can be actual offers, such as an invitation to an event. The offers can also be messages about products that the sales representative conveys during the contact call. These messages augment the call products detailed by delivering more granular information and by recording the responses received during detailing. These messages are part of marketing campaigns, and responses must be recorded in order to capture the bidirectional flow of information.

The contact's response also appears in the Track Results view for the campaign; this closes the loop on the marketing strategy and allows the marketing manager to assess the effectiveness of the campaign and to further refine segmentation and targeting.

This task is a step in *Process of Completing Call Activities*.

To record offer responses in contact calls

1. Display the call in the Contact Call Detail - Marketing view, for example, in one of the following ways:
   - Navigate to the Activities screen, then the Activities List view, and drill down on a planned contact call activity.
   - Navigate to the Contacts screen, then the Contacts List view, drill down on a contact, click the Calls tab, and drill down on the call.

> **Note:** For more information on scheduling and creating contact calls, see *Creating a Contact Call*.

2. In the Marketing Communications list, select an offer.

   This list displays campaign offers where:

   - The offer is of channel type Contact Call
   - The contact is a prospect associated with the offer's campaign

3. In the Response list, create a new record and complete the necessary fields.

   The choices for the Response field are restricted to the response templates set up for the offer. For more information, see about contact call offers in the *Siebel Marketing User Guide* .

   After the call is submitted, the responded to offer record will not be available for future calls to that contact. If no response was recorded for the offer, the offer record is not included in the submitted call and will be available for future calls to the contact.

Recording and Submitting Contact Calls

Some end users carry their laptops with them throughout the day and enter call information as they make the calls. (This is necessary if signatures are captured electronically when samples are dropped.) Others choose to enter all call details at the end of the day.

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 in 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 any samples dropped and obtain signatures for these dropped samples
- Enter information about any promotional items dropped
- Record any decision issues discussed during the call
- 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 *Administering and Managing Accounts in Life Sciences*.

This task is a step in *Process of Completing Call Activities*.

To record and submit contact calls

1. Display the call in the Contact Call Detail view, for example, in one of the following ways:

   - Navigate to the Activities screen, then the Activities List view, and drill down on a planned contact call activity.
   - Navigate to the Contacts screen, then the Contacts List view, drill down on a contact, click the Calls tab, and drill down on the call.

Note: For more information on scheduling and creating contact calls, see *Creating a Contact Call*.

2. In the Product Detailed applet, add products to detail.
   The pop-up which opens lists all the products which can be detailed.
3. Enter priorities for the products you want and click OK.
   Some fields 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.
Product	The product detailed during the call.

4. In the Samples Dropped applet, create a new record for each product dropped during the call and complete the necessary fields in the pop-up that is displayed.
   The Samples Dropped applet shows all sample products available to the user and Lot# from Personal Inventory. You can click on Show All which will show all Valid Product Lot# combinations.
   If there are two active allocations for a given product, the application displays the same lot# of each allocation record. If this is the case, ensure that the allocation records loaded do not have overlapping dates.
   Some fields are described in the following table.

Field	Comments
Available Qty	Quantity available in the sales representative's inventory.
Cut Off Date	Date after which it is not advisable to sample the product.
Expiry Date	Date on which the product expires.
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 for Samples*.
Max Quantity	The maximum quantity that a sales representative can sample.
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 *Managing Pharma Samples*

Field	Comments
Quantity	The quantity of sample dropped during the call.
Stop Sampling	A flag which identifies that this sample cannot be disbursed anymore.

Note: If the sample you dropped does not appear in the Name field drop-down list, the sample has not been defined as a product. It is the responsibility of your administrator to define products.

If you select a Smart Call Template, the application populates the Qty values based on the Smart Call Template. If there are two active Lot # for a product, Qty values are applied by the application based on the cut off date and the Last Physical Count value being greater than zero.

5. In the Samples Request applet, create a new record for each product dropped during the call and complete the necessary fields in the pop-up that is displayed.

Some fields are described in the following table.

Field	Comments
Name	Name of the sample.
Stop Sampling	A flag to indicate if the stop sampling field is set.
Min Quantity	The minimum number of samples that a sales representative should deliver.
Max Quantity	The maximum number of samples that a sales representative can request
Available Quantity	The number of samples that a sales representative has.
Quantity	Enter the number of samples requested by the doctor.

The Direct Send products will not have an opening count, closing count, physical count. The sales representative cannot transfer, return, adjust, report loss or theft for these samples because they do not have possession of the samples. The Sample Carry Process and the Inventory Period will be used only for sample carry products.

6. (Optional) Click the Validate link in the Call Details view.

   The validation engine validates the call against sample eligibility rules without navigating to the Signature Capture screen. The sales representative can validate the call prior to meeting the professional and ensure all business rules are met.

   The validation process uses all rules defined by the Administrator for sampling. A message applet shows all warning and error messages, if any. If there are issues that must be fixed, then the sales representative can correct them first and then click Sign. The validation process will also copy the correct State Lic# and DEA# details to the call, based on the selected Address for the call.
7. If you are collecting an electronic signature for the dropped samples:
   a. Click Sign.
   b. Obtain the professional's signature.
   c. Enter sample reference number (if required) in the Ref # field.
   d. Save the record.
8. If you are collecting a paper signature for the dropped samples:
   a. Select the Paper Sign check box.
   b. Obtain the professional's signature on the paper record.
   c. Enter sample reference number (if required) in the Ref # field.

   Note: If you want to create a new activity for a different contact at the time of capturing a signature, click New Sample Drop button. The Pick Contact Applet is displayed.
9. In the Promotional Items Dropped list, create a new 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.
Quantity	The quantity of the promotional item dropped during the call.

10. In the Issues list, create a new record for each issue discussed during the call and complete the necessary fields.

    Note: Decision issues are the objectives a contact can raise when evaluating a product before making a prescribing decision. For more information, see *Defining Decision Issues*.
11. Verify that all information entered is correct and click Submit.

    Note: Once you submit a call, you cannot delete the call nor modify any fields except the Comment field.

Recording a Contact Call for a Different Contact at the Time of Signature Capture

A sales representative creates a call for a contact, but prior to saving the signature, sales representative might need to choose a different contact or change the address of the call. The representative might need to create a new sample drop call for another contact whom he or she might have met while waiting for the first contact to arrive.

A representative can change an existing call, and click Pick And Sign to quickly navigate back to the Signature Capture view.

A representative can also create a new Call record based on an existing call directly from within the Contact Call view. The New Sample Drop button on the Contacts Call applet enables users to create a Contact Call record with contact Id, address and samples dropped based on data setup from an existing call. The created Call records are displayed in the Contacts Call Detail view under Activities. The user is prompted to select the contact name, and click Pick And Sign to capture the signature.

This task is a step in *Process of Completing Call Activities*.

Creating a New Sample Drop For a New Contact By Using an Existing Contact Call

The following procedure shows you how to use an existing contact call to create a new sample drop for a new contact.

To create a new Sample Drop for a new contact by using an existing contact call

1. Navigate to the Contacts List screen.
2. Select a Contact record from the list.
3. Click New Call.

   A new Contact record is created and the Contact Call Detail view is displayed.
4. Add Sample Drop records or choose a Smart Call Template to prepare the sample drops.
5. Click Sign.

   If all the business rules are valid, the signature capture window is launched.
6. Verify the contact's name, address, DEA number and license number displayed in the call header.

Changing the Contact Address for an Existing Call

The following procedure shows you how to change the contact address for an existing call.

To change the contact or address of an existing call

1. Click Cancel on Signature Capture view.
2. Click the look up icon on the Last Name field.

   The Pick Contact Applet is displayed. You can query All Contacts, Affiliated Contacts, and By Location to find the relevant contacts.
3. Select a contact from the list, and click Pick And Sign to navigate back to the Signature Capture view.
4. Click the look up icon on the Address field.

   The Pick Address Applet is displayed.
5. Select the correct address from the list, and click Pick And Sign to navigate back to the Signature Capture view.

Creating a New Sample Drop Contact Call By Using an Existing Call

The following procedure shows you how to use an existing call to create a new sample drop contact call.

To create a new Sample Drop contact call by using an existing call

1. Click Cancel on Signature Capture view.
2. Click New Sample Drop in the Contact Call Detail view.

   The Pick Contact Applet is displayed. You can query All Contacts, Affiliated Contacts, and By Location to find the relevant contacts.
3. Select a contact from the list, and click Pick And Sign to navigate back to the Signature Capture view.

   Note: The sample drop records are copied when the user clicks New Sample Drop. The details, promotional items, and decision issues are not copied over.
4. Save the signature of the contact.

   This action decrements the inventory and creates sample transaction history records.

Recording and Submitting 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)
- Obtain signatures for dropped samples
- Enter information about any activities related to the call (optional)
- Submit the call

This task is a step in *Process of Completing Call Activities*.

To record and submit account calls

1. Display the account call in the Account Call Detail view, for example, in one of the following ways:
   - Navigate to the Activities screen, then the Activities List view, and drill down on a planned account call activity.
   - Navigate to the Accounts screen, then the Accounts List view, drill down on an account, click the Calls tab, and drill down on the call.

     Note: For more information on scheduling and creating account calls, see *Creating an Account Call*.
2. In the Call Products Detailed list, create a new record for each product detailed during the call and complete the necessary fields.

   Some fields 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 *Siebel Pharma Developer's Reference*.
Product	The product detailed during the call.

3. For each contact and employee who attended the account call: Create a new record in the Attendees list and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	The Add Attendees dialog box displays both contacts and employees. Affiliated contacts are those associated with the account. For more information, see *Indicating an Affiliation Between an Account and a Contact*.
Samples Dropped	Remember to specify quantity and lot number (if required).
Sample Reference Number	Reference number for any samples dropped. This reference number becomes the transaction number (Transaction # field) for a samples transaction corresponding to this call. For information on samples transactions, see *Managing Pharma Samples*.

   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.
4. Drill down on the Name field for each attendee added to the account call.
5. In the Contact Call Detail view:

   a. Enter any further information such as promotional items dropped and issues discussed.
   b. Obtain a paper or an electronic signature for the dropped samples.

   For more information, see Step 7 or Step 8 in the topic *Recording and Submitting Contact Calls*.
6. Return to the parent account call in the Account Call Detail view by clicking the back button.

7. In the Activities applet, add any general activities records for the call, such as a reminder to send information about an upcoming medical education event.
8. Verify that all information entered is correct and click Submit.

> **Note:** Once you submit a call, you cannot delete the call nor modify any fields except the Comment field.

> **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.

Remaking Electronic Signatures

The sales representative can create an updated sample receipt and signature in the event that the original call information was incorrect.

For example, if Dr. Smith mistakenly signs for the receipt of samples on a request form having a different physician's name (such Dr. Jones), then the sample form is inaccurate. In this example, the sales representative must change the name on the original call to the correct physician (Dr. Smith) and have Dr. Smith sign again.

Using the Recreate Receipt button, the sales representative can capture a second signature on the corrected sample form. The Pharma application automatically tracks the appropriate audit trail information required by the FDA and similar agencies in other countries in the recreate receipt functionality.

This task is a step in *Process of Completing Call Activities*.

To remake a receipt

1. Display the submitted call in the Contact Call Detail view, for example, in one of the following ways:
   - Navigate to the Activities screen, then the Activities List view, and drill down on the contact call activity.
   - Navigate to the Contacts screen, then the Contacts List view, drill down on a contact, click the Calls tab, and drill down on the call.
   - Navigate to the Accounts screen, then the Accounts List view, drill down on an account, click the Calls tab, and drill down on the Attendee's name.
   - Navigate to the Activities screen, then the Activities List view, drill down on a planned account call activity, and drill down on the Attendee's name.
2. Click Recreate Receipt.
3. Edit the name and address fields for the professional.
4. Click Sign.
5. Obtain the professional's signature and save the record.

> **Note:** Signature records are not sent to the local database in order to avoid sizing issues, and in case your local database is re-extracted.

The Recreate Receipt process first attempts to deactivate current signatures before capturing a new one. If you re-extracted your local database after having captured a signature, the original signature record will not be available to you, hence the process is aborted and you will not be able to capture a recreated receipt signature. Nothing happens when you click the Recreate Receipt button for calls created and signed prior to the re-extraction of your local database.

If you require that local signatures are downloaded from the server to your local database, contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance from Oracle's Application Expert Services.

Configuring the New Call Button

Your administrator can specify what View to display when you click on the New Call button. A user property can be defined and used in conjunction with Contact Call, Account Call, or Accounts Contacts Call New Call button. Administrators can specify the fields to be copied over to the new call. Administrators can also enable automatically setting the call type, for example, Sample Drop, Detail, or Detail with Sample Drop.

Configuring the Submit Button

This topic provides information about how to configure the Submit button.

Changing the Requirement That One Product Must Be Detailed

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. The table in the topic *Transaction Processing for Call Activities* describes the specific actions that occur when clicking the Submit button in the views in which it appears.

This one-product-dropped requirement can be changed by the administrator in the Siebel runtime repository. The validation engine controls all the user properties related to the Submit and Sign button. When you click the Submit button in either the Contact Call Detail and Account Call Detail views, all sample records with quantity less than or equal to zero are deleted. All detail records with priority (if any), and all promotional items with quantity less than or equal to zero are also deleted.

> **Note:** A call cannot be deleted after it has been submitted. This behavior is controlled by a specialized class and, for regulatory and data integrity reasons, cannot be configured to allow for deletion.

LOVs That Should Not be Changed

The following table describes the LOVs that are required in the submit process. Do not delete or inactivate these LOVs.

LOVs Required for the Submit Process

Type	Language-Independent Code
SAMPLE_INVOICE_TYPE	Return
SAMPLE_INVOICE_TYPE	Transfer In

Type	Language-Independent Code
SAMPLE_INVOICE_TYPE	Transfer Out
SAMPLE_INVOICE_TYPE	Inventory Adjustment
SAMPLE_INVOICE_TYPE	Invoice Receipt
SAMPLE_INVOICE_TYPE	Disbursement
SAMPLE_INVOICE_TYPE	Sample Order
SAMPLE_TXN_STATUS	Submitted
SAMPLE_TXN_STATUS	In Progress

Changing Read-Only Fields

As mentioned in this chapter and in *Managing Pharma Samples* the Siebel administrator can change the fields that become read-only after a call is submitted or synchronized with the Siebel Mobile application for Siebel Pharma on a mobile device. By default, only Comment is editable after clicking the Submit button. Edit the Update After Submit user property to change which fields are editable after a call is submitted. See the table in the topic *CSSBCPharmaCall Class Business Component User Properties* for details.

Configuring Signature Capture

This topic provides information about how to configure signature capture in Siebel Open UI, including how to configure the Sign button for electronic signature capture and how to configure the LS Pharma Call Signature form applet. Information about the following is included in this topic:

- *About the Sign Button*
- *Configuring the LS Pharma Call Signature Form Applet*
- *Workflows for Sample Transaction Management and Signature Capture in Siebel Open UI*
- *Configuring the Signature Applet in Siebel Open UI*
- *Customizing Applets to Capture Signatures in Siebel Open UI*

About the Sign Button

Every time a user clicks the Sign button, a special validation process is carried out before the physician can sign for dropped samples. When a user clicks the Sign button, the Signature Capture view with Sample Dropped applet with

products quantity greater than zero, Signature Header, Signature Control, Disclaimer Text, Save, Clear, Cancel and Change Professional (Same as Cancel) buttons are displayed.

The disclaimer text is a concatenation of multiple disclaimer statements based on type of professional, location of sample drop, and type of product. For more information about disclaimers, see *Managing Disclaimers*.

Note: In order that the Signature Disclaimer text appears in Life Sciences reports, you must copy InkToolsLib.jar and iSignBmp.jar files from $SIEBEL_HOME/CLASSES to OC4J_HOME/j2ee/home/applications/xmlpserver/xmlpserver/WEB-INF/lib.

If any of checks are not met, the Signature Capture view does not display and an error message specifies the specific point of failure.

Because not all pharmaceutical companies require validation, Siebel Pharma can be configured to turn the validations on or off using user properties in the validation engine.

Note: The following user properties previously present in the Pharma Professional Call Business Component are now are obsoleted. A new validation engine has been introduced and can be configured to set the validation user properties. The validation properties which have been disabled are:

- Validate Sign Lot Number
- Validate OK to Sample
- SRE Professional Types
- Validate License Number
- Validate License Number Status
- Validate License Number Expiration
- Validate DEA Number
- Validate DEA Expiration
- Validate Professional Profile

User properties can be used to alter the Sign button's validation logic.

Configuring the LS Pharma Call Signature Form Applet

Various display features of the LS Pharma Call Signature Form Applet can be edited, as described in the following table.

User Property	Description	Default
AxProperty: ActiveBorderColor	Border color when the control has the focus	10485760
AxProperty: BackgroundColor	Background color of the control window	*null* (equals white)
AxProperty: BorderColor	Border color when the control is enabled but does not have focus	10485760
AxProperty: BorderStyle	Single, double, 3D, or no border on the window	1
AxProperty: DisabledBorderColor	Border color when the control is disabled	*null* (equals white)
AxProperty: DisabledColor	Ink color when the window is disabled	*null* (equals white)
AxProperty: InkColor	Current color of pen input	10485760
AxProperty: InkWidth	Current width of pen input	3
AxProperty: CompressionEnabled	Enables/Disables compression of the ink data	0
AxProperty: CompressionLevel	The compression level for compression of the ink data (0 - 5, with best fidelity at level 0 and highest compression at level 5)	0
AxProperty: DisplayMode	0 - Normal - Ink is displayed as collected without any scaling or offsetting. This is the default. 1 - Force To Fit 2 - Shift To Control 3 - Proportional Fit 4 - Custom	0
AxProperty: WritingGuide	Either no guide, letter guide, signature guide 0- No Line 1- Single Line 2- Signature Guide	0

Workflows for Sample Transaction Management and Signature Capture in Siebel Open UI

The following workflows must be upgraded and activated to manage sample transactions and signature capture functionality in Siebel Pharma for Siebel Open UI.

- LS Pharma Sample Transaction Submit
- LS Pharma Location Audit Submit
- LS Pharma Interim Inventory Count
- LS Pharma CloseOut Inventory Count

For more information about upgrading and activating these workflows, see the following topics:

- *Upgrading Workflows for Sample Transaction Management and Signature Capture in Siebel Open UI*
- *Activating Workflows for Siebel Pharma*

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Configuring the Signature Applet in Siebel Open UI

The following procedure provides one example of how to configure signature capture in Siebel Open UI. The example describes how to configure the Signature applet in Siebel Open UI.

To configure the Signature applet in Siebel Open UI

1. Copy a signature form applet that comes predefined with Siebel Open UI:
   a. Open Siebel Web Tools.

      For more information, see Configuring Siebel Business Applications.
   b. In the Object Explorer, click Applet.
   c. In the Applets list, locate an applet that includes a signature capture configuration.

      For example, locate the following applet: LS Pharma Signature Capture Form Applet.

      This example uses Siebel Pharma as an example. You can modify the objects for your Siebel application, as necessary.
   d. Right-click the applet you located in Step c, and then click Copy Record.
   e. Add an _PUI suffix to the name. For example:

      ```
      LS Pharma Signature Capture Form Applet_PUI
      ```

   f. Add applet user properties:

      - In the Object Explorer, expand the Applet tree, and then click Applet User Prop.
      - In the Applet User Props list, add the following applet user properties.

Name	Value
CanInvokeMethod: ClearSignature	TRUE
Signature Min Length	5

   g. Update the existing control properties:

      - In the Object Explorer, click Control.
      - In the Controls list, update the following controls.

Name	Description
Clear Signature	Set the MethodInvoked property to ClearSignature.
Signature Capture	Set the following properties: o Set the Field property to Signature. o Set the HTML Type property to InkData. o Set the Field Type property to BC Field.
Disclaimer Text	Set the Read Only property to TRUE.

Name	Description

h. Add an applet web template:

- In the Object Explorer, click Applet Web Template.
- In the Applet Web Templates list, right-click the Base applet web template, and then click Copy Record.
- Set the following properties.

Property	Value
Name	Edit
Type	Edit

i. Deploy LS Pharma Signature Capture Form Applet_PUI.

2. Add the LS Pharma Signature Capture Form Applet_PUI to the LS Pharma Location Audit Signature Capture View:

a. Go to the LS Pharma Location Audit Signature Capture View in the Siebel runtime repository and lock the object.
b. Right-click the object and select Edit Web Layout.
c. Go to the Signature applet.
d. In the empty template, select the LS Pharma Signature Capture Form Applet_PUI move it after the Signature applet.
e. Go to the Web Template Item view, query for the LS Pharma Signature Capture Form Applet_PUI, and then change the Applet Mode to Edit
f. Deploy the LS Pharma Location Audit Signature Capture View.

3. Add the applet LS Pharma Signature Capture Form Applet_PUI to the manifest administration:

a. Log in to the client with administrative privileges.
b. Navigate to the Administration - Application screen, and then the Manifest Administration view.
c. Under UI Objects, create a new record with the following values:

Interactive Flag	Type	Usage Type	Name
N	Applet	Physical Renderer	LS Pharma Signature Capture Form Applet_PUI

d. Under Object Expression, add the following child applet for the record created in Step 3c.

Interactive Flag	Expression	Level
N	Desktop	1

Interactive Flag	Expression	Level

e. Under Files, set the following file values:

Interactive Flag	Name
N	`3rdParty/jquery.signaturepad.min.js`

f. Navigate to the Administration - Personalization - Applets view.
g. Query for and select the LS Pharma Signature Capture Form Applet and set following values:

Field	Value
Start Date	NULL
End Date	NULL
Conditional Expression	`GetProfileAttr("IsOpenUI") < 1 OR GetProfileAttr("IsOpenUI") IS NULL`

h. Create a copy of the LS Pharma Signature Capture Form Applet and name it LS Pharma Signature Capture Form Applet_PUI.
i. Set the following values for the LS Pharma Signature Capture Form Applet_PUI:

Field	Value
Start Date	NULL
End Date	NULL
Conditional Expression	`GetProfileAttr("IsOpenUI") > 0`

Customizing Applets to Capture Signatures in Siebel Open UI

This example describes how to customize applets to capture signatures for calls in Siebel Open UI. For more information about this example, see the topic about Customizing Applets to Capture Signatures in *Configuring Siebel Open UI* .

Rendering Signatures in the UI

The following procedure shows you how to dynamically render signatures in the UI.

To dynamically render signatures in the UI

1. Perform the following runtime repository changes:
   a. Log in to Siebel Web Tools and go to the Signature display applet.

      > **Note:** If configuring signature capture and display using the same applet, then it is recommended that you create a new applet for display purposes by cloning the existing applet.

   b. Create a new applet control with the properties shown in the following table to display the signatures in the UI.

Name	Field	HTML Type	HTML Attribute	Caption - String Reference	HTML Height	HTML Width
Signature Image	SignatureImg	InkData	Migrated	SGL_Signature-100511304	150	450

   c. Query for the control that displays Open UI signatures and add the Open UI property to the control.
   d. Ensure that the controls mentioned in the previous steps are shown in the UI.
2. Perform the following seed data changes:
   a. Navigate to Site Map, Administration - Application, and then the Manifest Files view.
   b. Create a record with the values shown in the following table.

Inactive Flag	Name
N	`siebel/dynamicsignctrlrenderer.js`

   c. Navigate to Site Map, Administration - Application, and then the Manifest Administration view.
   d. Go to the UI Objects applet and create a record with the values shown in the following table.

Inactive Flag	Type	Usage Type	Name
N	Applet	Physical Renderer	Type in the (*Signature Display Applet Name*).

Inactive Flag	Type	Usage Type	Name

e. Go to the Object Expression applet and create a record with the values shown in the following table.

Inactive Flag	Expression	Level
N	Desktop	1

f. Go to the Files applet and create two records with the values shown in the following table.

Inactive Flag	Sequence	Name
N	1	`siebel/dynamicsignctrlrenderer.js`
N	2	`3rdParty/jquery.signaturepad.min.js`

Marking Package Insert Delivery and Post Market Surveillance Calls as Complete

After Package Insert Delivery (PID) and Post Market Surveillance (PMS) calls have been completed, sales representatives will need to mark them as complete in Siebel Pharma.

This section contains instructions about marking PID and PMS calls as complete.

For information about PID and PMS calls, see *Call Planning Features Specific to the Japanese Pharmaceutical Market*.

Marking a PID Call as Complete

The following instructions explain how to mark a PID call as complete.

To mark a PID call as complete

1. Navigate to the Package Insert Delivery screen, then the Mark Completion view.
2. Select an insert from the Products list.
3. Select the account from the Mark Completion list.
4. Select the check-box in the Executed column.

   The status of the activity will change to In Progress if there are multiple inserts associated with the activity or Complete if this is the only insert associated with the activity.

Marking a PMS Call as Complete

The following instructions explain how to mark a PMS call as complete.

To mark a PMS call as complete

1. Navigate to the Post Market Surveillance screen, then the Activity Details view.
2. Select an Account Product combination.
3. Select an Activity.
4. Click Submit.

10 Managing Pharma Samples

Managing Pharma Samples

This chapter covers the following topics:

- *About Managing Pharma Samples*
- *About Samples Transactions*
- *About Samples and Lot Numbers*
- *Scenarios for Managing Samples*
- *Managing Samples Transactions*
- *Managing Pharma Samples*

About Managing Pharma Samples

Most pharmaceutical manufacturers provide free samples to health care professionals in an effort to influence the prescribing habits of physicians 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.

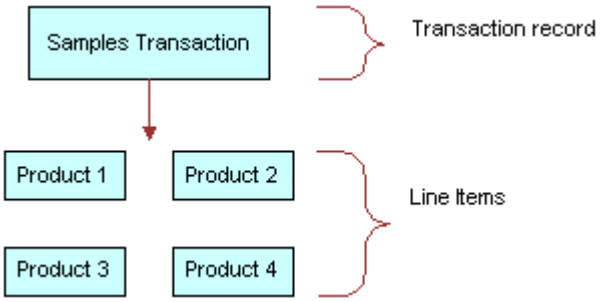
This chapter describes how to manage and maintain an electronic inventory of samples and promotional items using Siebel Pharma Samples Management. Using the procedures given in this chapter, you will be able to perform the administrator tasks of setting up and maintaining a home-office master inventory (optional) and monitoring samples disbursements, orders, transfers, receipts, discrepancies, adjustments, and inventory counts. End users use the Samples screen and the Sample Management screen 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 *Scenarios for Managing Samples*.

About 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 the following image, 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.



If the approval process is enabled in your application, every transaction must be tracked through the approval process so that the correct transaction status is displayed.

Inventory Reconciliation

In the United States, pharmaceutical companies can 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 can perform inventory adjustments to justify the discrepancies. For more information, see *Reconciling an Inventory Period*.

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*.

PDMA Compliance and Lot Numbers

Companies in the United States might 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 *Managing Samples Transactions*.

Inventory Periods

Because 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 the following table.

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.

Period Type	Description
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 three unreconciled periods: one active period and two inactive periods. The Siebel administrator can control the number of unreconciled periods allowed. For more information, see *Reconciling an Inventory Period*.

How Siebel Samples Management Works with Calls

This topic describes how Siebel Samples Management works with the Contact Call Detail and Account Call Detail views. For more information on recording calls, see *Completing Contact and Account Call Activities*.

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 *Siebel Pharma Developer's Reference*.
- 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:

- A valid paper or electronic signature has been obtained.
- 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*

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.
- Creates a samples disbursement transaction, with a line item for each dropped sample recorded for the call when Signature is saved for Electronic Signature Calls.
- 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 the Siebel Mobile application for Siebel Pharma on a mobile device). For information, see *Siebel Pharma Developer's Reference*.

Note: If attendees are recorded in an account call, an attendee call is created for each attendee, and the previous process described 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.

About 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:

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

  This option is the default setting. Set the system preferences as shown in the following table:

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

  Note: An administrator sets the system preferences by navigating to the Administration - Application screen, then the System Preferences view.

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

  Set the system preferences as shown in the following table:

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

System Preference	Value

In addition to these system preference changes, a Siebel administrator must use Siebel Web Tools to control product visibility associated with this behavior. For more information, see *Siebel Pharma Developer's Reference*.

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

- Do not use lot numbers for samples management.

  Set the system preferences as shown in the following table:

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

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

Scenarios for Managing Samples

This topic 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 might follow a different process 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 (optional), and allocates and transfers samples to the sales representatives in the field. Once sales representatives acknowledge them, the samples are available during call execution. 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.

Scenarios discussed in this chapter include:

- *Scenario 1: Administrator Establishes a Master Inventory* **.** The Siebel samples administrator establishes and transfers inventory to end users.
- *Scenario 2: 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.
- *Scenario 3: Users Transfer Samples to One Another* **.** Describes the basic process of how users can exchange samples inventory within Siebel CRM.

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 *Completing Contact and Account Call Activities*.

Scenario 1: Administrator Establishes a Master 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 samples inventory, the next step is to transfer inventory to each end user. When each recipient electronically receives the shipment, they acknowledge the application which automatically enters the received samples into their inventory counts.

In this process, 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 *Managing Products for Life Sciences*.
- **Define lot numbers (optional).** For more information, see *Defining Lot Numbers for Samples*.
- **Set up and reconcile initial master inventory.** For more information, see *Establishing an Initial Inventory*.
- **Allocate samples to sales representatives.** For more information, see *Allocating Samples*.
- **Transfer inventory to end users.** For more information, see *Creating a Samples Transfer*.
- **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*.
- **Manage electronic signatures.** For more information, see *Checking Electronic Signatures*.
- **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 Full Receipt of a Samples Transfer*.
- **Use the new samples in regular call reporting.** For more information, see *Completing Contact and Account Call Activities*
- **Transfer samples to other end users.** Sales representatives exchange samples among themselves. For more information, see *Creating a Samples Transfer*.
- **Request more samples.** For more information, see *Creating a Samples Order*.
- **Perform inventory adjustments.** For more information, see *Adjusting a Past Samples Transaction*.
- **Reconcile inventory periods as needed.** For more information, see *Reconciling an Inventory Period*.

Scenario 2: 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 process requires more steps for the end user because they must first establish an initial inventory and then reconcile it before they can disburse any samples.

Administrator Procedures

Samples administrators require administrative responsibilities in Siebel Samples Management to:

- **(Optional) Define lot numbers.** Samples can be tracked by lot numbers For more information, see *Defining Lot Numbers for Samples*.
- **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*.
- **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*.
- **Check electronic signatures.** Regularly check Signature Audit Administration to verify that signatures collected from contacts are consistent. For more information, see *Checking Electronic Signatures*.
- **Identify sample locations in the event of recalls.** Follow your company's guidelines for managing sample recalls.

End-User Procedures

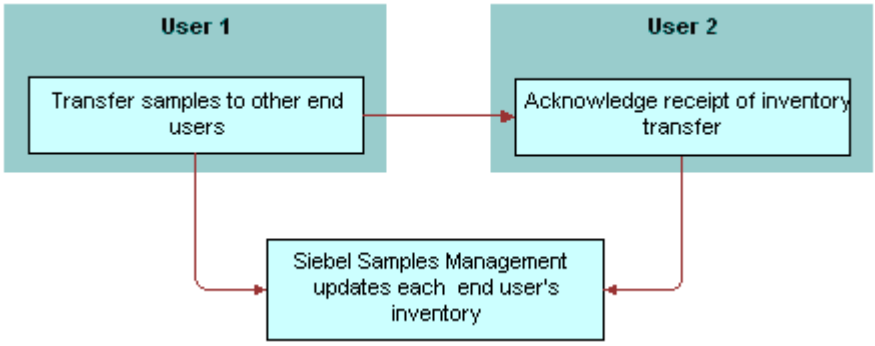
The end users are the sales representatives who distribute samples to health care professionals. They enter information to:

- **Set up and reconcile initial master inventory.** For more information, see *Acknowledging Full Receipt of a Samples Transfer*.
- **Use the new samples in regular call reporting.** For more information, see *Completing Contact and Account Call Activities*.
- **Transfer samples to other end users.** Sales representatives exchange samples among themselves. For more information, see *Creating a Samples Transfer*.
- **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 Full Receipt of a Samples Transfer*.
- **Perform counts and adjustments.** For more information, see *Adjusting a Past Samples Transaction*.
- **Reconcile inventory periods as needed.** For more information, see *Reconciling an Inventory Period*.

Scenario 3: Users Transfer Samples to One Another

This scenario describes the basic process for exchanging inventory with other users within Siebel CRM. 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.

The following image illustrates this process.



Managing Samples Transactions

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 in the Siebel runtime repository. When users click the Submit button for a samples transaction, the system checks the 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 Received Samples view) 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 occur 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.
- Received Samples (transactions whose Type field is Transfer In) are added to the submitter's inventory counts.

- Sent Samples (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 Transactions view, the Add, Adjust, and Submit buttons are enabled or disabled as follows:

- If the transaction's Status field is set to Submitted, the Adjust button, and the New button in the Line Items Applet and Submit buttons are 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 and the New Button in Line Items Applet are enabled and the Adjust button is disabled.

Managing Pharma Samples

The following topics describe the key tasks required to manage pharma samples:

- *Defining Lot Numbers for Samples*
- *Establishing an Initial Inventory*
- *Managing Inventory Tracking and Reconciliation Without Lot Numbers*
- *Allocating Samples*
- *Creating a Samples Transfer*
- *Creating a Samples Transfer*
- *Adjusting a Past Samples Transaction*
- *Checking Electronic Signatures*
- *Managing Disclaimers*
- *Acknowledging Full Receipt of a Samples Transfer*
- *Creating a Samples Order*
- *Acknowledging Full Receipt of a Samples Transfer*
- *Acknowledging Partial Receipt of a Samples Transfer*
- *Adjusting an Inventory Count*
- *Recording Thefts and Losses*
- *Reconciling an Inventory Period*
- *Submitting a Location Audit Report*

- *Submitting an Interim Count*
- *Submitting a Closeout Count*
- *Viewing Inventory Audit Report*
- *Placing Sample Orders Request*
- *Viewing Sample History*
- *Viewing Sample History by Allocation*
- *Setting Compliance Thresholds*
- *Viewing Compliance Reports*
- *Enabling Approval and Signature Processes*
- *Viewing Orderable Items*
- *Viewing Orderable Items*

Prerequisites for Managing Samples

Administrators. Before you can set up Siebel Samples Management, you must first define your products. For more information, see *Managing Products for Life Sciences*.

End-users. Before end-users can drop samples, they must acknowledge received samples if allocation functionality is enabled.

Defining Lot Numbers for Samples

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*.

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*.
- Define the products that will be disbursed as samples. For more information, see *Defining Internal Products*.
- Define the lot numbers for each product. For more information, see the procedure in this topic.

If you track disbursements at the lot number level, you can track inventory with or without using lot numbers. For more information on disabling lot number tracking see *Disabling Lot Number Tracking*. For more information on reconciliation without lot numbers, see *Managing Inventory Tracking and Reconciliation Without Lot Numbers* and *Enabling Inventory Reconciliation Without Lot Numbers*.

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*.

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 on setting up lot tracking, see *Defining Internal Products* paying specific attention to the table in the topic *Product Categorization Settings* and the table in the topic *About Samples and Promotional Items Settings*.
2. Navigate to the Sample Management screen, then the Lot Setup view.
3. In the Lot Setup list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Cut Off Date	This is non editable field and works in conjunction with the Short Days field. The initial value is calculated based on the expiration date and short days (if present). If the short days is not present, then expiration date will be the cut off date. Cut Off Date is Expiration Date - Short Days. At the time of sampling, this date helps the sales representative in disbursing the products based on the number of days from expiry.
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* paying specific attention to the table in the topic *Product Categorization Settings* and the table in the topic *About Samples and Promotional Items Settings*.
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.

Field	Comments
	For more information, see *Defining Internal Products* paying specific attention to the table in the topic *Product Categorization Settings* and the table in the topic *About Samples and Promotional Items Settings*.
Short Days	Indicates the number of days before expiration from which the lot becomes short dated. If the sampling product has Short Days defined in the Administration - Product setup, then the Short Days value becomes the default value for this field. It can be modified by the administrator. Products which have passed the expiration date are not available to the sales representative at the time of sampling.
Status	This is a read-only field which indicates whether the lot can be fulfilled. Possible values are: o Good (if current date is less than cut off date) o Expired (if current date is greater than expiration date) o Short Dated (if current date is in between expiration date and cut off date)

4. 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*. 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* and *Defining Internal Products* become active.

Regardless of whether you have set the Samples Lots Enabled system preference to TRUE or FALSE, samples dispersed with lot numbers should appear in both the Samples History and the Inventory Count views. Thus, even if you decide not to use lot numbers, your samples history is fully recorded.

To disable lot number tracking for samples

- Set the Samples Lots Enabled system preference to FALSE.

  For general information about setting system preferences, see *Siebel Applications Administration Guide* .

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*.

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 *Scenarios for Managing Samples*, either an administrator or an end user can establish an inventory. However, because 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* paying specific attention to the tables in the topics *Product Categorization Settings* and *About Samples and Promotional Items Settings*.

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* and *Managing Samples Transactions*.

Note: End users do not need to perform the procedures described in this topic 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 Full Receipt of a Samples Transfer*. However, end users do need to perform the procedures described in this topic 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.** Add products to the inventory.

  For more information, see *Adding Products to an Inventory*.
- **Submit count.** Submit an initial count.

  For more information, see *Submitting an Initial Count*.
- **Submit adjustments.** Create and submit adjustments for the initial count.

  For more information, see *Creating and Submitting an Initial Count Adjustment*.
- **Reconcile.** Reconcile the initial inventory period.

  For more information, see *Reconciling the Initial Inventory Period*.

Adding Products to an Inventory

The following procedure shows you how to add a product to an inventory.

To add products to an inventory

1. Navigate to the Samples screen, then the Inventory Count view.
2. Create a new inventory count record and complete the following fields on the form that appears:
    a. **Sample.** Select a product from the Sample list.
    b. **Lot #.** (Optional) Select a lot number from the Lot # list.

Submitting an Initial Count

The following procedure shows you how to submit an initial count.

To submit an initial count

1. Navigate to the Samples screen, then the Inventory Count view.

    The LS Pharma Inventory Periods list applet should display only the currently active inventory period.
2. Click Closeout Count.

    This button may be disabled if there are no quantities present in the Physical Count column.
3. Click the History tab.

    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.
4. (Optional). Create adjustment transactions for the period, as described in *Creating and Submitting an Initial Count Adjustment*.

    You cannot submit an adjustment transaction if the product is not currently active. Siebel Samples Management considers a product inactive if:

    - The administrator has made the product inactive
    - The product does not exist in the inventory count list (product might have been deleted if the on-hand quantity was zero)
    - The product does not have an active allocation period

Note: Inactive products do not display in drop-down lists or dialog boxes, although they might be visible in views displaying products.

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*.

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 Full Receipt of a Samples Transfer*.

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 without using lot numbers for inventory and reconciliation.

To support 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 Administration - Product screen.
- Implement product visibility. For more information, see *Retaining Sample Product Visibility*.

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.

Tracking and Reconciling Inventory Without Lot Numbers

The following procedure shows you how to track and reconcile the inventory (without lot numbers).

To track and reconcile inventory without lot numbers

1. Set the Samples Lots Enabled system preference to TRUE.
2. Set the Lots for Disperse Only system preference to TRUE.

   For general information about setting system preferences, see *Siebel Applications Administration Guide* .

Creating and Submitting an Initial Count Adjustment

The following procedure shows you how to create and submit an initial count adjustment.

To create and submit initial count adjustments

1. Navigate to the Samples screen, then the Transaction view.
2. From the view drop-down list, select Inventory Adjustments.
3. In the Inventory Adjustments list, create 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 a validated date in the Transaction Date (Txn Date) field, making sure that the adjustment is entered into the appropriate inventory period.

Field	Comments
Transaction #	The application automatically generates an unique identifier. You cannot 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, create 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. If you want to have the items appear in a particular order, edit this value in the Administration - Product screen.
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 *Submitting an Initial Count*).
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.

Reconciling the Initial Inventory Period

The following procedure shows you how to reconcile the initial inventory period.

To reconcile the initial inventory period

1. Navigate to the Samples screen, then the Reconciliation view.

The Reconciliation view contains the following applets.

Applet	Description
Inventory Periods (Unreconciled)	Shows all inactive (past, unreconciled) inventory periods. An active period becomes inactive once you submit an inventory count for the period (as described in *Submitting an Initial Count*).
Inventory Count (Unreconciled)	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 Inventory Count list. If no transactions were entered for the selected product during the inactive inventory period, this list is empty.

2. In the Inventory Count applet, 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*.
3. In the Inventory Periods applet, click Reconcile.

   The lists in the view are cleared.
4. Click the History tab.

   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.

Allocating Samples

Administrators assign samples to sales representatives through the allocation process. The sales representatives deliver the samples to the health care professionals. The application provides the ability to display products for a sales representative and updates them as they become active or inactive. Allocation is applicable to samples, promotional items, and detailing products. Allocation records can either be manually entered, or loaded into the application using EIM.

Using the allocation process, if a sales representative has a product in inventory, and the product does not have an active allocation for a certain period, then the product will not be available for selection, and cannot be added as part of a New call or a Smart call. Products available for selection are filtered based on start and end dates from the Allocation screen.

Note: Products of type Promotional items and details are allocated in a similar way to the allocation of sample products.

To allocate samples

1. Navigate to the Sample Management screen, then the Allocations view.

2. Select Samples from the view drop-down list.
3. In the Samples list, create a new record and complete the necessary fields.

   Some fields are described in the following table:

Field	Comments
Owner Last Name	This is an MVG field. The last name of the sales representative to whom the sample should be allocated.
Owner First Name	This is an MVG field. The first name of the sales representative to whom the sample should be allocated.
Start Date	Start Date of the allocation period. Sales representatives cannot access the samples before this date.
End Date	End Date of the allocation period. Sales representatives cannot access the samples after this date
Active	This is a read-only check box which is populated based on the Start Date and End Date. The check box is disabled for an inactive period and is enabled l be for an active period (current date is a date between the Start Date and End Date).
Sample	This is a drop-down field. Administrator can select the sample which will be allocated to the sales representative.
Max Quantity	This is the maximum quantity a sales representative can allocate in one call. If the sales representative samples more than this quantity to the doctor, a message is displayed to indicate that the user has exceeded the limit. If a change is made to this value, it is reflected only on the mobile device after the sales representative performs a synchronization.
Allocated Quantity	The number of samples allocated for this allocation period.
Stop Sampling	If this flag is checked, the sales representative cannot sample this drug anymore. This behavior is noticed only after the sales representative synchronizes their mobile device.
Product Type	Read-only field of Sample product type.

Note: If a sales representative creates a call with a certain call date, chooses the products, and then changes the Call Date, the Call Validation process displays an error and prevents the sales representative from collecting a signature or submitting the call.

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 his or her inventory count. For more information, see *Acknowledging Full Receipt of a Samples Transfer*.

Note: Returns (expired or spoilt products) to the headquarters are treated similar to regular Send transactions.

To create a samples transfer

1. Navigate to the Samples screen, then the Transaction view.
2. Select Sent Samples from the view drop-down list.
3. In the Sent Samples list, create 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.
Transfer to	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: o Transfer Out - Indicates you are transferring samples to another employee. o 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.

Field	Comments
	Transfers with the Transfer Type field set to Return do not generate shipment transactions, and they are *not* added to the master inventory counts. However, the samples administrator can see returned samples transactions in the Sample Compliance views. For more information, see *Monitoring Samples Activities*.
Inventory Period with Comments	Inventory period restricts the available products and Lot #'s for selection when adding line items. Also ensures that only valid product and Lot # for the selected inventory period are available for selection and that the Transfer Txn is entered for the appropriate inventory period.

4. In the Line Items applet, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Item #	The application automatically generates an 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. If the approval process in enabled, then the transaction must be approved before the correct status is reflected.

   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. Click the History tab.

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 the following table to monitor samples activity across the enterprise.

To monitor samples activities

- Navigate to the Sample Management screen, then one of the following views as required:
- Inventory Count view
- Reconciliation view
- Transaction view (then Sent Samples, Received Samples, or Sample Discrepancies)
- Samples Orders view
- Location Audit Reports view

These views are described in the following table, are read-only, and appear only when you are connected to the server.

Administrator Views for Monitoring Samples Activity

View	Description
Inventory Count	Shows samples inventory counts that have been submitted within the enterprise.
Reconciliation	This view allows the administrator to view and reconcile inventory periods for any sales representative in the application.
Transaction	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 and disbursement transactions provide a clear audit trail of samples inventory adjustments.
Sent Samples	Shows samples transfer transactions submitted. The Line Items list shows the line items of the samples transfer currently selected in the Sent Samples list. This view allows the administrator to review samples returns or shipments sent between end users.
Received Samples	Shows samples receipt transactions submitted by end user. The Line Item list shows the line items of the samples receipt currently selected in the Samples Receipts list. This view allows the administrator to review sent shipments between end users.
Sample Discrepancies	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. This view allows the administrator to make sure that samples are not being diverted.

View	Description
Samples Orders	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. This view allows the administrator to review samples order sent from end users.
Location Audit Reports	Lists all the location audit reports submitted.

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. Also, users cannot adjust transactions if the Disable Adjustments flag is checked by the administrator for the specific user.

You adjust a past samples transaction in the Disbursements 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.

Adding Additional Samples

The following procedure shows you how to add additional samples.

To add additional samples

1. Navigate to the Samples screen, then the History view.
2. In the Inventory List applet, select a product.
   When you select a product in the Inventory List, the Samples History applet 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.
3. Once you identify the transaction, click on the hyperlink.
   The Call Details view opens.
4. In the Call Details view, click the New Samples Drop to create a new activity.
5. Fill in all the details and either get a paper signature or an electronic signature.
   If you receive an electronic signature, ensure that you save the signature.
6. Submit the activity.

Adjusting the Quantity in a Samples Transaction

The following procedure shows you how to adjust the quantity in a samples transaction.

To adjust a quantity in a samples transaction

1. Navigate to the Samples screen, then the Transactions view.
2. Select Disbursements from the view drop-down list.
3. Select a record which is processed, and click Adjust.

   The application creates a new record.
4. Modify the quantity in the line items.
5. Submit the adjusted transaction.

Checking Electronic Signatures

End users can use Siebel Pharma (desktop application) or the Siebel Mobile application for Siebel Pharma to electronically capture signatures. The Signature Audit Administration view lists all the electronically captured signatures of a contact to whom samples were dropped in a linear format.

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.

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 the table in the topic *Monitoring Samples Activities* to monitor samples activity across the enterprise.

Performing Signature Audit

Sales representatives capture electronic signatures from doctors when drugs are sampled. Signature Audit is the process by which the sample compliance teams periodically audit the signatures in the application to check that they are authentic.

To perform signature audit

1. Navigate to the Sample Compliance screen, then the Signature Audit view.
2. Perform a query based on a doctor's name.
3. Click Verify to compare signatures. Alternatively, you can manually compare the signatures.
4. (Optional) Generate an incident for a signature, relate the incident to a case, and track all activities as follows:
   a. Navigate to the Sample Compliance screen.
   b. Select the Signature Audit view
   c. Select a record from the Signature list applet.
   d. Select one or more signatures from the Signatures applet and click Generate Incidents.

      The application creates incidents for each of the selected signatures.

5. View incidents from the Incidents screen, then the Incidents List view.

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 because it is stored in a text field in the same table. In the Pharma Signature Receipt Form, the control before the Signature shows the full name of the contact at the time of the call (that is, no reference to the S_CONTACT table). Because 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 Events and Receipts view shows an entire sample transaction as it was recorded at the time the signature was captured. Sales representatives can submit electronically captured signatures using the Siebel Pharma desktop application or the Siebel Mobile application for Siebel Pharma.

To display Sample Events and Receipts

- Navigate to the Sample Compliance screen, then the Sample Events and Receipts view.

Managing Disclaimers

There are two types of disclaimers as follows:

- Static disclaimers: The Disclaimer Management view shows the static disclaimer information that appears in the LS Pharma Call Signature Form Applet (in the Siebel Pharma desktop application) or the Siebel Signature Capture display (in the Siebel Mobile application for Siebel Pharma).
- Dynamic disclaimers: Dynamic disclaimers control disclaimer text during signature capture based on a number of parameters, such as physican type, state where the sampling is being done, and the sample.

Creating and Activating a New Static Disclaimer

The following procedure shows you how to create and activate a new static disclaimer.

To create and activate a new static disclaimer

1. Navigate to the Sample Management screen, then the Disclaimer Management view.
2. In the Disclaimers list, create a new record and complete the necessary fields.
   The new disclaimer becomes active immediately. Only one disclaimer can be active at a time. Some fields are described in the following table.

Field	Comments
Disclaimer	The actual text for the disclaimer.
Apply to	Apply disclaimer text to one of the following:

Field	Comments
	○ Inventory Audit ○ Pharma Call ○ Transaction Adjustment
Status	Valid values include Active and Expired. There can only be one active text displayed for all the products.

3. Select the record and click Activate.
   The selected record becomes active and any previously active static disclaimers expire.

Creating a New Dynamic Disclaimer

The following procedure shows you how to create a new dynamic disclaimer.

To create a new dynamic disclaimer

1. Navigate to the Sample Management screen, then the Disclaimer Management view.
2. From the view drop-down list, select Disclaimer Text to create a new dynamic disclaimer text record.
3. From the view drop-down list, select Dynamic Disclaimer Rule Set.
   a. Create a new dynamic disclaimer rule set record and complete the necessary fields as required. Some fields are described in the following table.

Field	Comments
Name	The name of the rule.
Apply to	Apply the rule to one of the following: - Inventory Audit - Pharma Call - Transaction Adjustment
Status	Valid values for the rule set include Active and Expired. There can only be one rule set active at any one time.

   b. In the Rules applet, create rules for the dynamic disclaimer rule set and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	The name of the rule.

Field	Comments
Rule Type	Apply the rule as one of the following: - Expression - Invoke Method - Business Service (not supported)
Sequence	The sequence in which to apply the rule when multiple rules are present.

c. In the More Info applet, add rule expressions and conditions to the dynamic disclaimer rule set and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Name of the rule set (automatically populated).
Rule Type	This field is automatically populated by either the Expression or Invoke Method rule type.
Conditional Expression	A pop-up field which can be used to build an expression based on the underlying business components.
Disclaimer Text	The text for which the rule set is applied.
Method Name	Specifies the method to invoke.
Description	Brief description of the rule.

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, then the Samples Orders view.
2. In the Samples Orders list, create a new record and complete the necessary fields.

   The application creates 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.

3. In the Line Items list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
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 3 to enter a line item for each product or promotional item you want to order.
4. 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 Full 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*.
- By creating a samples order, see *Creating a Samples Order*.

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*.

To acknowledge full receipt of a samples transfer

1. Navigate to the Samples screen, then the Transaction view.
2. From the view drop-down list, select Received Samples.

3. In the Received Samples list, select the transfer that you want to acknowledge and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Invoice #	The application automatically generates an unique identifier. You cannot change this value.
Transfer From	User who originated the transfer.
Reason	Reason for the transaction. Values include: o Lost o Found o Request o Initial Count
Expected Delivery Date	Expected delivery date of the transfer.
Comments	Any comments entered by the sender.
Transaction Status	Automatically generated. If no action is taken by the user, value is In Transit.

   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 Processed (after approval, if approval flow is enabled).

4. In the Transfer In Item List, enter values for the acknowledged quantities to reflect the quantity received.

Field	Comments
Lot #	Number of the lot as defined by the administrator.
Product	Name of the product.
Shipped Qty.	Number of the items shipped.
Acknowledged Qty.	Number of items acknowledged.
Received Qty.	Number of items received.

Field	Comments

5. Click Submit.

   If there is no difference between the received and acknowledged quantities, then the status of the transaction is set to Processed. If the approval process is enabled for transactions, then the status becomes Processed after the approval.

   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.

Acknowledging Partial Receipt of a Samples Transfer

If there is a difference in the received and acknowledged quantities, you have the option either to close the transaction with a discrepancy, or keep the transaction open and mark the transaction as Partially Received.

To acknowledge partial receipt of a samples transfer

1. Navigate to the Samples screen, then the Transaction view.
2. From the view drop-down list, select 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 Processed (after approval, if approval flow is enabled).
4. In Transfer In Item List, modify the Received Qty. field.

   If the quantities (received and acknowledged) are different, a pop-up message displays indicating that there is a difference in the transfer amounts.

   Click OK to close out the transfer to generate a discrepancy report or click Cancel to leave the transfer report open by acknowledging partial transfer. If you click OK, a report is generated. If you click Cancel, the report is open and the status changes to Partially Received.

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 can 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*.

Note: Administrators can define dynamic disclaimers for transaction adjustments.

Recording Thefts and Losses

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

To record a sample theft or loss

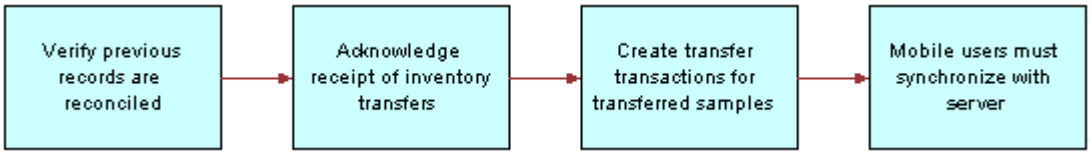
1. Navigate to the Samples screen, then the Transactions view.
2. From the view drop-down list, select Inventory Adjustments or Samples Lost
3. Create a new inventory adjustment or samples lost record and complete the necessary fields.
    a. In the Adjustment Reason field, select Lost.
    b. In the Line Items applet, create a new record and complete the necessary fields.
    c. Click Submit.

Note: If the approval flag is enabled, the transaction goes through an approval process.

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* .

Prior to starting inventory reconciliation, users must perform certain inventory reconciliation prerequisite steps as outlined in the following image.



These inventory reconciliation prerequisite steps must be performed in the following order:

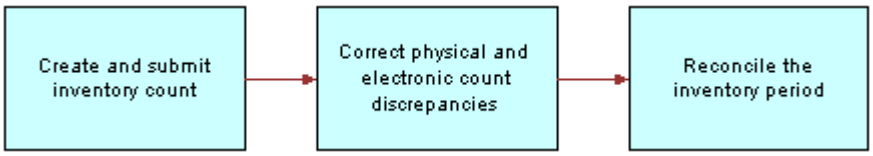
- **Verify previous inventory periods are reconciled.** End users must reconcile previous inventory periods in chronological order. This is only a concern if a company's configuration allows more than one inactive, unreconciled period. For more information, see *Acknowledging Full Receipt of a Samples Transfer*.
- **Acknowledge receipt of inventory transfers.** End users must send acknowledgements for all received sample inventory shipments. For more information, see *Acknowledging Full Receipt of a Samples Transfer*.
- **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*.
- **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 *Identifying Discrepancies in Inventory Counts*.

The following image shows the steps involved in the reconciliation process.



The inventory reconciliation steps must be performed in the following order:

- **Create and submit a closeout 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 *Creating and Submitting a Closeout Inventory Count*.

  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 *Adjusting Multiple Quantities with a New Adjustment Transaction*.

    This method allows end users to adjust the inventory counts of multiple products with a single adjustment transaction (containing multiple line items). However, they might 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 *Adjusting the Quantity in a Samples Transaction*.

  This method allows end users to adjust the quantity of a selected line item in a previously entered transaction. However, they might 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 *Reconciling an Inventory Period*.

Creating and Submitting a Closeout Inventory Count

The following procedure shows you how to create and submit a closeout inventory count.

To create and submit a closeout inventory count

1. Physically count all samples currently on-hand.

2. Navigate to the Samples screen, then the Inventory Count view.

   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.

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

   The Difference field in some records can 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 Interim and follow the procedures:*Identifying Discrepancies in Inventory Counts*.
- If the Difference field in all records is equal to zero, click Submit and follow the procedure *Reconciling an Inventory Period*.

Identifying Discrepancies in Inventory Counts

The following procedure shows you how to identify discrepancies in inventory counts.

To identify discrepancies in inventory counts

1. Navigate to the Samples screen, then the Reconciliation view.
2. In the Inventory Periods list, select the period that you want to reconcile.
3. In the Inventory Count list, review the list to determine how many product records show a value other than zero in the Difference field.
4. For every record in the Inventory Count 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 a small number of 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 use the following procedure: *Adjusting the Quantity in a Samples Transaction*.

- If multiple records require adjustments, enter a single adjustment transaction, with multiple line items, that adjusts all the quantities. To do this use the following procedure: *Adjusting Multiple Quantities with a New Adjustment Transaction*.

Adjusting Multiple Quantities with a New Adjustment Transaction

The following procedure shows you how to adjust multiple quantities with a new adjustment transaction.

To adjust multiple quantities with a new adjustment transaction

1. Navigate to the Samples screen, then the Transaction view.
2. From the view drop-down list, select Inventory Adjustments.
3. In the Transaction # view, create a new record and complete the necessary fields.

   Some fields 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 an unique identifier. You can change this value.
Transaction Date	The application automatically generates an 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, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Expiration Date	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 4 in the topic *Identifying Discrepancies in Inventory Counts*: o If the value that you recorded was positive, enter a negative quantity. o If the value that you recorded was negative, enter a positive quantity.
Sample	The product for which you want to enter a quantity adjustment.

Field	Comments

Repeat Step 4 until you have entered a line item for each needed adjustment.

5. In the Transaction # view, click Submit.

   The values of the Transaction Status field (in the Inventory Adjustments list) and the Item Status field (in the Line Items list) change to Submitted.
6. Reconcile the inventory period, as described in *Reconciling an Inventory Period*.

Reconciling an Inventory Period

The following procedure shows you how to reconcile an inventory period.

To reconcile an inventory period

1. Navigate to the Samples screen, then the Reconciliation view.
2. In the Inventory Period list, select the inventory period that you want to reconcile.
3. Review the records in general.
4. In the Inventory Count list, review the records and verify that the value of the Difference field for each record is zero.
5. Click Reconcile.

   If the approval process is enabled in your application, the approver receives an Inbox item in their Inbox. If the approval process is not enabled, then the Samples Reconciliation view is cleared immediately.

You can reconcile a period only if there is no difference between the physical count and the amount displayed by the application, and if there are no pending transactions in the approval period.

> **Note:** End users must create transfer transactions for any samples transferred to another representative or returned to the home office for the period prior to reconciliation. Also, 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 if they are recording samples received in a future period.

Submitting a Location Audit Report

Location audit s are periodically done so that the place where samples are stored by the sales representatives is in accordance with the company policies and access is provided only to authorized users. An administrator or a sales representative can create location audit reports, associate a location assessment template with the report, capture responses to the questionnaire, and submit the report for approval.

To submit a location audit report

1. Navigate to the Samples screen, then the Location Audit Report view.

2. In the Location Audits list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Type	Read-only field. Defaults to Location Inspection.
Inspection Complete Date	Defaults to the current date and time by default.
Owned By	Owner of this report.
Submit To	Administrator can select a person to who this report should be submitted for approval.
Status	Shows a status of In Progress when a new record is created. When the user submits the record for approval, the status changes to Submitted and at which stage none of the values can be modified. The status changes to Approved after the person in the Submit To field approves the record.
Reason	Select a reason for submitting this report. Possible values are: o Weekly-Interim o Special-Interim o Annual o Annual - Close Out o For Cause o For Cause - Close Out o Termination - Close Out

3. (Optional) Associate a sales assessment template of type Location Audit.

   Note: Administrators can create Location Audit templates from the Administration-Date screen, then the Sales Assessment Templates view.

4. (Optional) Associate attachments to the report.

   Some fields are described in the following table.

Field	Comments
Expiration Date	This field is automatically filled when you complete the Lot # field.
Item Status	The application changes the value in this field. Changes to Submitted when you submit the transaction.

Field	Comments
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 4 in the topic *Identifying Discrepancies in Inventory Counts*: o If the value that you recorded was positive, enter a negative quantity. o If the value that you recorded was negative, enter a positive quantity.
Sample	The product for which you want to enter a quantity adjustment.

5. Sign and submit the report.

   If the approval process is enabled, then signature will be needed. If not, the report can be directly submitted.

Submitting an Interim Count

Sales representative can submit interim reports frequently so that there is no major sample count difference between what the Siebel Business Application reports and what the sales representative reports. The period remains open if an interim sample count is submitted.

To submit an interim count report

1. Navigate to the Samples screen, then the Inventory Count view.

   The LS Pharma Inventory Periods List Applet should display only the currently active inventory period. Some fields are described in the following table.

Field	Comments
Last Count Conducted By	The person who conducted the count last time.
Last Count Date	Date which the physical count was conducted.
Reviewed By	User who reviewed the last inventory report.

Field	Comments
Start Date	Start date of the inventory period.
Submit To	Defaults to the setting in the Sample Compliance screen. You can edit this setting, if required.

2. Enter values for each of the samples in the Physical Count column in the LS Pharma Inventory Count List applet.

   Some fields are described in the following table.

Field	Comments
Sample	Name of the sample.
Lot #	Lot number of the sample, if applicable.
Expiration Date	Expiration date of the sample.
Cut Off Date	Automatically calculated based on the field expiration date and short days
Opening Balance	Opening balance of the sample in the current inventory period.
Last Count	Sales representatives manually count the number of samples they have. This column represents the number of samples counted prior to submitting an interim count or closeout count.
Physical Count	Sales representatives can count the number of samples and enter values for each record.

3. Click Interim Count to create an interim count report.

   The Interim Count button is enabled if you are a primary auditor and you have selected an active inventory period.

   > **Note:** If a report is submitted but not yet approved, then you cannot submit a new report. Also, if a closeout count is approved but not acknowledged, then both the Interim Count and Closeout Count buttons are disabled. Both the buttons will be disabled if there is no value entered in the count column.

   If signature and approval flows are enabled, then the person who is submitting the interim report must sign and the report goes through an approval process. For more information about the approval process, see *Enabling Approval and Signature Processes*.

Submitting a Closeout Count

An administrator or a sales representative can periodically submit closeout counts to close the current inventory period, mark the period as inactive, and open a new inventory period.

Note: An interim count does not open a new period.

To submit a closeout count

1. Navigate to the Samples screen, then the Inventory Count view.

   The LS Pharma Inventory Periods List Applet should display only the currently active inventory period.
2. Click Closeout Count.

   The Closeout Count button is enabled if you are a primary auditor and you have selected an active inventory period. If a report is submitted but not yet approved, then you cannot submit a new report.

   If a closeout count is approved but not acknowledged, then the Closeout Count button is disabled. Also, if Owned By and Submit To values are the same, then the Closeout Count option is not available and the button is disabled.

   Note: Products with expired lots and no physical inventory are not copied into the next inventory period when a closeout count is performed.

   If the Report is approved, the Current Physical Count values are copied to the Last Physical Count field. The Last Count Conducted By, and Last Count Date fields are updated by the employee name who submitted the report and the date when the count was conducted. The Current Physical Count field is cleared.

   If the Report is rejected, the Current Physical Count field is cleared. No updates are made to the Last Physical Count, Last Count Conducted By, and Last Count Date fields.

Viewing Inventory Audit Report

Inventory audit reports are automatically generated by the system when an interim or a closeout count occurs. Users cannot create inventory audit reports. Administrators and sales representatives can view previously submitted inventory counts (interim and closeouts) as reports. Administrators can accept or reject those reports.

To view an inventory report

1. Navigate to the Samples screen, then the Inventory Audit Report view.

2. Select any report from the list applet.
   Child applets display information relevant to the previously submitted counts.
   Some fields are described in the following table.

Field	Comments
Type	Read-only field that contains either: o Interim Inventory Count o Closeout Inventory Count
Count Completed By	Name of person who performed the manual count.
Created By	Name of person who created report.
Owned By	name of person who owns the report.
Status	Values include: o In Progress o Submitted o Rejected o Approved
Comments	Additional comments entered while submitting the report.

3. View the items in the inventory count applet.
4. (Optional) Associate attachments with the report.
   You can also update the Reason and Comment fields after the report is signed and submitted.

Placing Sample Orders Request

You can place a request for sample orders if your inventory stock runs low. If you attempt to place an order for a product for a quantity greater than the maximum allowable orderable quantity (in Allocations), the application displays a warning message. If you continue to submit an order, an exception flag is set so that the order can be tracked.

To place sample orders

1. Navigate to the Samples screen, then the Samples Orders view.
2. From the view drop-down list, select Sample Orders.
3. In the Samples Order list, create a new record and complete the necessary fields.
4. In the Line Items list, create line items for the samples that you want to order and complete the necessary fields.

Viewing Sample History

End users and administrators can select a specific period and view the sample history and sample counts for the period.

To view sample history

1. Navigate to Samples screen, then the History view.
2. In the Inventory Periods list, select a period and review the history for the specified period.

Viewing Sample History by Allocation

End users and administrators can view samples by allocation using the Samples History by Allocation view.

To view sample history by allocation

1. Navigate to Samples screen, then the Samples History by Allocation view.
2. In the Product Allocations list, select any record.

   For information about the Product Allocations view, see *Allocating Samples*.
3. In the Samples History list, review the information.

   Some fields are described in the following table.

Field	Comments
Sample	Name of the sample.
Lot #	Lot number corresponding to the sample.
Quantity	Number of items in the transaction.
Expiration Date	Expiration date of the lot.
Item Status	Status of the transaction.
Transaction Date	Date on which the transaction happened. This date is linked to the actual transaction.
Transaction Type	Possible values include Disbursement, Loss, Report and so on.
Transaction #	Transaction number for tracking purposes.

Field	Comments
Transaction Status	Possible values include Adjusted, Processed, Submitted and so on.

Setting Compliance Thresholds

Employee's compliance against certain thresholds can be checked periodically.

To set thresholds

1. Navigate to Sample Compliance screen, then the Employee Based Tracking view.
2. Query for a sales representative (employee).
3. Set thresholds for the sales representative as follows:

Field	Comments
Transfer Discrepancies	The maximum amount for transfer discrepancies.
Reported Loss	Number of times the employee reported loss within a specified number of days.
Overdue Inventory Check	Shows the number of days where the sample inventory, or audit/reconciliation has not been recorded. (Threshold)
Overdue Acknowledgement	Number of sales representatives who have not recorded receipt of sample shipment within a specified period from the shipment date or who have not recorded receipt of transfer within a specified period from the transfer date.
Overdue Certification/Training	Number of days where the annual sample testing/certification has not been completed within the specified time.
OK to Sample	Enable if the selected employee is ok to sample.
Disable Adjustment	If enabled, the employee cannot make any adjustments to the transactions.

Viewing Compliance Reports

Users can view compliance reports periodically to monitor any violations of threshold values. A number of reports for example, show employees who reported loss, are overdue for training, who recreated receipts, who made adjustments to their transactions, and so on.

To view compliance report

- Navigate to the Sample Compliance screen, then the Compliance Report view.

  A list of all the employees who have violated the thresholds is displayed.

Enabling Approval and Signature Processes

All transactions can be associated with an approval flow. Approval flows are enabled by default but you can disable them through the user properties in the LS Pharma Inventory Administration Service. For more information about user properties in the LS Pharma Inventory Administration Service, see *Siebel Pharma Developer's Reference*.

The approval process is the standard Siebel approval process and provides appropriate fields to route the approvals to the various users and use Inbox for approvals. If the approval process is enabled, all transactions occur after final approval is received. If the approval process is disabled, the process is initiated on submission of a transaction.

All transactions by default also need the user's signatures before submitting them. However, similar to the approval flows, signature requirement can be disabled by setting the user properties in the LS Pharma Inventory Administration Service.

Viewing Orderable Items

End users and administrators can view orderable items using the Orderable Items view.

To view orderable items

1. Navigate to Samples screen, then the Orderable Items view.
2. View the list of orderable items, if any.

Viewing My Product Focus

End users can view the products (samples, promotional items, details, and Samples Request items) they need to focus on from the My Product Focus view. You can query by product, start date of a product allocation, end date of a product allocation.

To view My Product Focus

1. Navigate to the Call Activities screen, then the My Product Focus view.

2. Perform your query.

11 Creating Smart Calls

Creating Smart Calls

This chapter covers the following topics:

- *About Creating Smart Calls*
- *Scenario for Smart Calls*
- *Administering Smart Calls*
- *Creating a Smart Call (End-User Task)*
- *About Applying a Smart Call Template to a Call*

About Creating Smart Calls

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 *Scenario for Smart Calls*.

Scenario for Smart Calls

This topic outlines an example process performed by the Siebel administrator and end users. Your company might follow a different process 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:

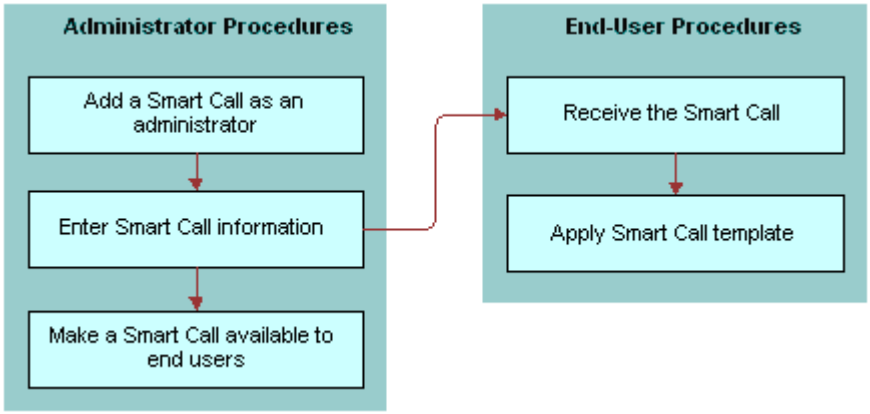
- Create a new Smart Call and enter Smart Call information
- Make a Smart Call template available to end users

The end users are sales representatives in the field. They enter information to:

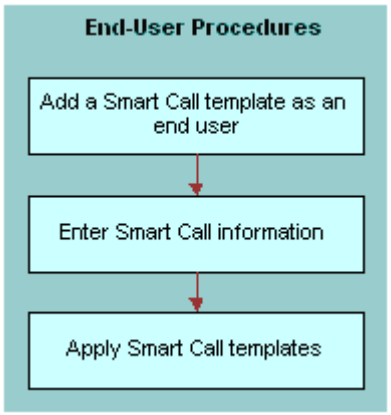
- Create Smart Call templates and enter Smart Call information
- Apply a Smart Call template to an account or contact call
- Modify Smart Call information after it has been applied to a call

The following image illustrates the workflows for these scenarios as follows:

- **Administrator Procedures:** Add a smart call as an administrator, Enter smart call information, then Make a smart call available to end users.
- **End-user Procedures:** Receive the smart call, then Apply smart call template.



- **End-user Procedures:** The following image illustrates more (end-user) workflows as follows: Add a smart call template as an end-user, Enter smart call information, then Apply smart call templates.



Administering Smart Calls

The following administrator procedures are described in this topic:

- *Creating Smart Calls (Administrator Task)*
- *Entering Smart Call Information (Administrator Task)*
- *Making Smart Call Templates Available To End Users*

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 view in the Administration - Application screen. The administrator can also create and modify Smart Calls using the Administration - Application screen, Smart Calls, Smart Call Detail view.

Note: Both end users and the Siebel administrator can create and modify Smart Calls using the views in the Smart Calls screen. For more information, see *Creating a Smart Call (End-User Task)*.

Creating Smart Calls (Administrator Task)

The following procedure shows you how to create a Smart Call as an administrator.

To create a Smart Call as an administrator

1. Navigate to the Administration - Application screen, then the Smart Calls view.
2. In the Smart Call list, create a new record and complete the necessary fields.

   Some fields 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* and *Creating an Account Call*.
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.

Entering Smart Call Information (Administrator Task)

The following procedure shows you how to enter Smart Call information as an administrator.

To enter Smart Call information as an administrator

1. Navigate to the Administration - Application screen, then the Smart Calls view.
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 might not need to enter information in every one of these lists.
4. For the appropriate lists, create a new record and complete the necessary fields.

   Some fields 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.

Making Smart Call Templates Available To End Users

The following procedure shows you how to make a Smart Call template available to end users.

To make a Smart Call template available to end users

1. Navigate to the Administration - Application screen, then the Smart Calls view.
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.

Creating a Smart Call (End-User Task)

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 *Making Smart Call Templates Available To End Users*.

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 *Creating a Contact Call* and *Creating an Account Call*.

To create a Smart Call as an end user

1. Navigate to the Smart Calls screen.
2. In the Smart Calls list, create a new record and complete the necessary fields.

   Some fields 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* and *Creating an Account Call*.
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.

Entering Smart Call Information (End-User Task)

The following procedure shows you how to enter Smart Call information as an end user.

To enter Smart Call information as an end user

1. Navigate to the Smart Calls screen.
2. In the Smart Calls list, drill down on a Smart Call.
3. Click the Smart Call Detail 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 might not need to enter information in every one of these lists.

6. Create a new record and complete the necessary fields.

   Some fields 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 to 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 and Submitting Contact Calls* and *Recording a Contact Call for a Different Contact at the Time of Signature Capture*.

About Applying a Smart Call Template to a Call

End 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 *Creating a Contact Call* and *Creating an Account Call*.

Once a user applies a Smart Call template to a call, they can make additional edits to any fields in the current view.

12 Managing Managed Care Accounts

Managing Managed Care Accounts

This chapter covers the following topics:

- *About Managed Care in Siebel Life Sciences*
- *Scenario for Managed Care*
- *Process of Using Siebel Managed Care*

About Managed Care in Siebel Life Sciences

Siebel Life Sciences has a number of features that help pharmaceutical and medical product companies maintain important data about MCOs (managed care organizations) and PBMs (pharmacy benefit management companies). Some of these features are listed here:

- **Account Data.** MCOs and PBMs are entered as accounts of type Managed Care. The fields in the managed care account form are designed to hold data relevant to these businesses, such as enrollment, prescription spending, and number of participating providers.
- **Health Plans.** Health plans are associated with managed care accounts. Health plan records contain information about the individual plans offered by MCOs, such as the plan name, size, utilization, co-payment.
- **Formulary.** Formularies are associated with health plans. Typically a unique formulary is set up for each therapeutic market, so that a plan has a list of formularies associated with it. Each formulary lists the individual drugs and products available for prescription on the health plan.
- **Contacts.** Two types of contact that are typically associated with health plans are the providers of health-care services (for example, physicians) and members of the P & T committee.
- **Managed-Care Business Plans.** Managed-care account managers create business plans outlining how they can work with MCOs to promote the use of their company's products by members of the health plan. One way this is done is by influencing the P & T committee to add the products to formularies. Business plan records are associated with managed care accounts. Comprehensive data is contained in these business plans, including SWOT and business analysis views, key contact and account lists, formulary lists, and the objectives of the plan.

The following table defines some terms that are used in this chapter and also in the application's user interface.

Term	Description
health plan	This is a health insurance option (or product) offered by an MCO. Variables in plans are premiums, choice of providers, out of pocket expenses, treatments covered, and so on. Large MCO's typically offer a selection of health plans.
MCO (Managed Care Organization)	Health care insurer where the insuring company is involved in the delivery of care. This is contrasted with the traditional indemnity plan where the insurer is not involved in care delivery. MCOs offer HMO, PPO, POS health plans.

Term	Description
Formulary	The list of products, usually drugs that are available to patients subscribing to the MCO. Formulary can be managed: • In-house by the MCO, or • Outsourced to a PBM
PBM (Pharmacy Benefit Manager)	These are organizations that contract with MCOs to administer pharmacy benefits to members. In many cases, the MCO delegates the pharmacy benefit management to the PBM. Large PBMs can have their own P & T committee who develop a universal formulary. Individual MCOs then appoint their own P & T committees who select products from the universal formulary to develop formularies for the MCO's health plans.
Managed-Care Account Managers	These are the sales representatives who work for pharmaceutical and medical companies and who specialize in working with MCOs and in order to influence which products appear in the MCO's formularies.
HMO (Health Maintenance Organization)	In this type of health plan, members pay a fixed monthly premium and receive health care without charge or for a small fixed co-payment. There are several different types of HMOs and also hybrids of the different types available in the U.S.A. Some of these types are described in this table.
Staff Model HMO	In this type of health plan, the MCO employs salaried physicians and owns the medical facilities. Typically, the co-payment charge is minimal. Patients can only consult with the doctors in the HMO; though, in very rare cases these doctors refer patients to sub-specialists outside the network.
Group Model HMO	In this type of health plan, the MCO contracts with one or more large multi-specialty physician group practices to provide care. Doctors are not employed directly, instead the group practice employs the physicians.
IPA (Independent Practitioner Association Model)	In this type of health plan, a MCO contracts with many individual and group physician practices to form one or more associations of independent practitioners (IPAs). The IPA pays the physicians, but these physicians remain as contractors, not salaried employees, and maintain their offices independently.
POS (Point of Service)	This type of health plan is a mix of HMO and a traditional indemnity plan. When a patient stays in the HMO network of physicians and follows the referral path, care is fully covered (with the usual co-payment). When the patient seeks care outside the network specialist care without a primary care physician (PCP) referral within the network, the patient is covered at a lower level.
PPO (Preferred Provider Organization)	This type of health plan is similar to POS, except that a patient does not need a PCP referral to see a specialist within the network.
P & T (Pharmacy & Therapeutics) Committee	This committee is a group of health-care specialists, including physicians and pharmacists. The committee determine which products are in the MCO's or PBM's formulary.
SWOT analysis	This is a planning tool to help you evaluate the strengths, weaknesses, opportunities, and threats of your business and product in the marketplace. SWOT analysis is a component of a business plan.
Tiered Benefit	A tiered pharmacy benefit is one where the member's co-payments vary.

Term	Description
	For example, in a typical three-tiered system, generic drugs require the lowest co-payment, brand name drugs on the formulary require a higher co-payment, and brand name drugs off formulary require the highest co-payment.
Open Formulary	An open formulary is one where the MCO allows any drug to be prescribed.
Closed Formulary	A closed formulary is one where only the drugs on formulary can be prescribed. A closed formulary can be limited or unlimited.
Limited Formulary	A limited formulary is one where only a given number of drugs is allowed in each therapeutic class. In order for a new drug to be added, an existing drug must be removed from the formulary.
Unlimited Formulary	An unlimited formulary is one where there is no set limit on the number of drugs allowed in a therapeutic class.

Scenario for Managed Care

This scenario is an example process performed by a managed-care account manager and by a sales representative. Your company might follow a different process according to its business requirements.

The managed-care account manager and the sales representative are employees of a large pharmaceutical company.

Managed-Care Account Manager Maintains HMO Account Data

The managed-care account manager is responsible for a nationwide HMO account. His job is to influence the HMO so that it buys more of his company's drugs.

His first task when he is assigned this account is to enter data about the account, such as enrollment and spending data, information about the individual health plans offered by the account, and formulary lists for each plan.

Of particular interest to him are the members of the P & T committee; these are contacts who he wants to influence.

Sales Representative Reviews and Enters HMO Account Data

The sales representative is responsible for detailing the company's drugs to physicians in her territory. She makes professional calls and influences the prescription habits of the physicians she calls on.

Before she meets with a physician, she wants to know about the health plans that the physician is affiliated with. Of particular interest to her is whether the drugs she details are on the plans' formularies. Furthermore, if the physician happens to be on the P & T committee, it is most important that she know this so that she can discuss her approach in advance with the account manager.

Managed-Care Account Manager Prepares a Business Plan for the HMO Account

The account manager's relationship with the HMO can have significant impact on his company's sales revenues. The account manager plans his approach carefully. He creates a business plan for the account. It contains information about the account, including formulary, key contact, and associated account information, SWOT analysis, and finally his objectives with relation to the account for the coming year.

Process of Using Siebel Managed Care

This example process represents the tasks that are carried out in the *Scenario for Managed Care*.

- *Entering Health Plan and Formulary Information*
- *Associating Contact Information with Health Plans*
- *Creating a Business Plan for a Managed Care Organization*
- *Entering Formulary Information for Managed Care Business Plans*
- *Performing Business and SWOT Analysis for a Managed-Care Business Plan*
- *Associating Contacts and Accounts with Managed-Care Business Plans*
- *Setting Objectives for the Managed-Care Business Plan*

Entering Health Plan and Formulary Information

Managed-care account managers can use the Account Plan Formulary view to enter and maintain information about health plan designs and formularies owned or administered by the account and about the products on those formularies. Account managers associate P & T committee members and track formulary review dates to be well prepared for calling on their contacts in the account.

Sales representatives, making professional calls might hear about contacts' roles in P & T committees. They also can review the Plan Formulary information and add their contacts to the P & T member list as appropriate.

This task is a step in *Scenario for Managed Care*.

Who Owns the Formulary?

There are two approaches to setting up formularies in Siebel Life Sciences. The formulary can belong to one of the following:

- The MCO account
- The PBM account

Before deciding which type of account should own the formulary, review *Indicating Affiliations Between a Contact and an Account* and *Entering Formulary Information for Managed Care Business Plans*, and consider your own business process.

Creating Health Plan Information For an Account

This task explains how to create health plan information for an account.

To create health plan information for an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Plan Formulary tab.
4. In the Plan Design list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comment
Plan Type	See the table in the topic *About Managed Care in Siebel Life Sciences* for definitions of the default values in this LOV.
No. of Lives	Number of lives in the health plan. This number cannot exceed the total lives entered for the account. **Note:** The Total Lives field must be completed in the Account form before you enter a value in this field. (Click on the show more button to see this field.)
% of Total Lives	Equal to [(Number of Lives at Plan Level) divided by (Number of Lives at Account Level)] multiplied by 100.
Utilization	Number of health plan members who are using health plan benefits. This number cannot exceed the number of lives in the health plan.
Utilization %	Equal to [(Utilization) divided by (Number of lives at Plan Level)] multiplied by 100.
Co-Payment	Typically, the co-payment amount for a member visit to a primary care physician. The pharmacy co-payment is entered separately for each product.
P & T Members Name	Names of contacts who are on the Pharmacy & Therapeutics committee.
Pharmacy Distribution	Type of distribution, such as in-house, contracted, or mail-order.

Creating Formulary Information For an Account

This task explains how to create formulary information for an account.

To create formulary information for an account

1. Navigate to the Plan Formulary view.
   For information on how to navigate to the Plan Formulary view, see *Creating Health Plan Information For an Account*.
2. In the Plan Design list, select a health plan.
3. In the Formularies list, create a new record and complete the necessary fields.
   Some fields are described in the following table.

Field	Comment
Type	See *About Managed Care in Siebel Life Sciences* for definitions of the default values in this LOV.
Market	The option selected in this field determines which products are available in the formulary's Products list.

4. In the Products list, create a new record and complete the necessary fields.
   Some fields are described in the following table.

Field	Comment
Status	o Off Formulary — Banned from the formulary. o On Formulary — Approved by the formulary. o On/Prior Auth — Physicians require MCO or PBM approval before prescribing. o On/Restricted — One of the few drugs allowed its therapeutic class. o On/Exclusive — The only drug allowed in its therapeutic class.
Tier	If the product is in a tiered formulary, indicate the tier.
Reimbursable	For example, if a product is off formulary, but can be reimbursed with prior authorization, select this check box.
Qty Limit	The quantity allowed for a patient each year.
Competitor	This field is filled in automatically when the product's type is Competitive Product.

   By adding a product to the Products 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*.

5. Repeat Step 3 and Step 4 until you have created a record for every product on the formulary.

Associating Contact Information with Health Plans

Managed-care account managers can use the Contacts By Plan view (Accounts screen) to associate contacts (usually physicians) to health plans. This contact information can be entered in the UI as described here, but is more typically imported from external sources.

> **Note:** Sales representatives use the Contact Affiliations view (Accounts screen) to track similar information about contacts. However, the Contact Affiliations view differs because it associates the contacts to the MCO *account* and not to the individual health plans.

This task is a step in *Scenario for Managed Care*.

To associate contacts with account plans

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Contacts By Plan tab.
4. In the Plan Design list, select the plan to which you want to associate a contact.
5. In the Plan Contacts list, create a new record and complete the necessary fields.

Creating a Business Plan for a Managed Care Organization

The account manager creates a business plan for his MCO account. If the MCO contracts out its pharmacy formulary, the account manager can also choose to create a business plan for the PBM.

Typically business plans are created on a yearly basis, but the frequency varies according to business process. An account would have a number of business plans associated with it; each plan for a different period.

The first step in creating the business plan is creating the business plan record and entering overview information about the account.

This task is a step in *Scenario for Managed Care*.

To create an business plan for an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on an account.
3. Click the Business Plans tab.
4. In the Business Plans applet, create a new record and complete the necessary fields.
5. Drill down on the business plan record.

6. Click the Account Overview tab.

   In the Account Overview form, enter information about the account that pertains to the business plan. Some fields are described in the following table.

Field	Comments
Business Description	Use this text field to note general information about the MCO.
Regional Plans	Use this text field make note of other business plans related to this account. For example, if this is a national business plan, this field might contain the names of regional and local business plans that are related to this national plan.
Contracts Process	Use this text field to note information about the contracts process. For example, notes about any contracts for rebates or discounts that the pharmaceutical company has with the account or with the account's PBM.
HMO Lives	This is the number of individuals enrolled in the HMO health plans offered by the account.
Total Lives	This is the number of individuals enrolled in all the health plans offered by the account. This field should equal the sum the other three lives fields (HMO Lives, PPO Lives, and POS Lives). This field is the same as the Total Lives field in the Accounts screen. (Click on the show more button to see this field in the Accounts form.)
Network Phy	This is the number of physicians participating in the insurance network. This field should contain approximately the same number as the Physicians field in the Accounts screen, then the More Info view.
Network Hosp	This is the number of hospitals belonging to the insurance network.
PPO Lives	This is the number of individuals enrolled in the PPO health plans offered by the account.
POS Lives	This is the number of individuals enrolled in the POS health plans offered by the account.
Medicare	This is the number of individuals who are enrolled both in Medicare and in the health plans offered by the account.
Medicaid	This is the number of individuals who are enrolled both in Medicaid and in the health plans offered by the account.

Field	Comments

Entering Formulary Information for Managed Care Business Plans

The Pharmacy Benefit view allows the managed-care account manager to see, in a view list, all the products in all the formularies associated with a given business plan.

This task is a step in *Scenario for Managed Care*.

To add PBM and formulary information to a business plan for a managed-care account

1. Navigate to the Business Plans screen, then the Business Plan List view.
2. Drill down on a business plan record.
3. Click the Pharmacy Benefit tab.
4. In the Pharmacy Benefit list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Benefit Provider	Specify the account that owns the formularies that are relevant to the business plan. All products in all plans belonging to this account will be listed in the Formulary Status list in this Pharmacy Benefit view. Typically enter the name of the MCO account itself or of the PBM account. See note in *Entering Health Plan and Formulary Information*.
Tiered Benefit %	Indicate the approximate percentage of lives belonging to health plans with a tiered pharmacy benefit.
Open Benefit % Closed Benefit %	Indicate the approximate percentages of lives belonging to plans with open and closed formularies benefit.
Reimbursement Policy	Enter information about the benefit provider's reimbursement policy that is relevant to the business plan, for example, the co-payment rates, premium increases, or recent policy changes.
Formulary Approval Process	Enter information about the benefit provider's formulary approval that is relevant to the business plan, for example, how long it typically takes to have a new drug entered in the formulary.

Field	Comments

5. Go to the Formulary Status list and review the products in the formularies owned by the selected PBM.

Performing Business and SWOT Analysis for a Managed-Care Business Plan

When creating a business plan for managed care, the managed-care account manager needs to analyze both the market and the account. Two views in the business plan view that are useful during the analysis phase of preparing the business plan are:

- Business Analysis view for reviewing syndicated prescription data:
  - Rx Trend by Plan - Volume
  - Rx Trend by Plan - Market Share
- SWOT view for entering information about:
  - The account's (MCO's or PBM's) strengths and weaknesses
  - The opportunities and threats that the managed-care account manager needs to address in the business plan

This task is a step in *Scenario for Managed Care*.

To enter SWOT information for a business plan

1. Navigate to the Business Plans screen, then the Business Plan List view.
2. Drill down on a business plan record.
3. Click the Business Analysis tab.
4. Use the Business Analysis view to review prescription trends for the market of interest.

   For general information about analysis of syndicated data, see *Analyzing Syndicated Data*.
5. Click the SWOT tab, and complete the fields on the SWOT form that appears.

   Some fields are described in the following table.

Field	Comments
Strengths	For example, a recent study shows your drug is better tolerated by patients.
Weaknesses	For example, the MCO has very restrictive reimbursement policies for drugs in your market.
Opportunities	For example, a change of policy in the account makes it easier to get a drug added to the formularies.

Field	Comments
Threats	For example, a study indicates that a competitor's product is as effective and less expensive than the product you are promoting.

Associating Contacts and Accounts with Managed-Care Business Plans

When creating a business plan for managed care, the account manager gathers information about accounts and contacts that are associated with the business plan.

Views in the business plan view that are useful for recording related accounts and contacts are as follows:

- Account Coverage view: Use this view to list accounts associated with the business plan. For example, if the business plan is for a national account, add the names of the regional accounts associated with the national account.
- Organizational Analysis view: Use this view to list key contacts for the business plan and to indicate the relationships between the key contacts.
- Key Contacts view: Use this view instead of the Organizational Analysis view if you do not want to indicate the relationships between the contacts.

This task is a step in *Scenario for Managed Care*.

To associate accounts and contacts with business plan for a managed-care accounts

1. Navigate to the Business Plans scree, then the Business Plan List view.
2. Drill down on a business plan record.
3. Click the Account Coverage tab.
4. In the Account list, create new records and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Team	This field indicates which employees in your company are responsible for the account.
Coverage Level	For example, if the business plan is for a national account, the regional and local accounts associated with the national are listed. Use this field to indicate which account is regional or local.

5. Click the Organizational Analysis tab.
6. Use the Organizational Analysis view to enter your list of contacts and to indicate relationships between them.

   For general information about the organization analysis, see *Siebel Applications Administration Guide* .

Setting Objectives for the Managed-Care Business Plan

The last but very important stage of creating a business plan is for the managed-care account managers to list what they are going to do to carry out the plan. These are their objectives.

These objectives are created in the Business Plans screen, then the Objectives view, but can also be viewed, created, and edited in the Objectives screen, Objective List, and then the My Objectives view.

This task is a step in *Scenario for Managed Care*.

To create objectives for a business plan

1. Navigate to the Business Plans screen, then the Business Plan List view.
2. Drill down on a business plan record.
3. Click the Objectives tab.
4. In the Objectives list, create new records and complete the necessary fields.
5. Drill down on an objective record to add activities to the objective.

   For general information about objectives in Siebel Life Sciences, see *Setting and Achieving Objectives*.

13 Managing Account Contacts in Life Sciences

Managing Account Contacts in Life Sciences

This chapter includes the following topics:

- *About Japanese Pharmaceutical Market Features*
- *About Account Contacts*
- *Configuring Workflows for Account Contacts*
- *Managing Account Contacts*
- *Planning Calls in the Call Planning Screens*

About Japanese Pharmaceutical Market Features

The Japanese pharmaceutical market has some unique characteristics concerning the relationships of Hospitals and Physicians that influence how pharmaceutical companies conduct their Sales and Marketing activities in Japan. These market characteristics dictate how Sales Representatives engage with physicians and hospitals in their territories and how they plan future calls. For example Physicians always see patients at either large hospitals or small, private clinics. Therefore a contact call always takes place within the context of the Hospital (account) that the Physician (contact) is associated with.

Japanese Pharmaceutical companies also typically create and distribute large Targeting lists for each Sales Representative in their Sales Force which are based on the Hospital-Physician relationships and a series of Targeted Products. These Targeting lists are generally updated and distributed at the start of a new Targeting period, which is typically every quarter or half-year. The Hospital-Physician targeting lists include a number of targeting attributes (such as Call frequency) for one or more Products that are specific to each sales representative assigned to the specified Hospital-Physician. For example, one sales representative might be asked to make six visits to one account-contact during the quarter for Product A, but another sales representative might be asked to make only three visits to the same account-contact for the same Product A.

> **Note:** Features specific to the call-planning features in the Japanese Pharmaceutical market are not covered in this section. For information about the call-planning features specific to the Japanese market, see *Call Planning Features Specific to the Japanese Pharmaceutical Market*.

The following Siebel Life Sciences features address the requirements of the Japanese pharmaceutical market:

- **Hospital-Physician relationships.** Sales representatives can visualize Hospital-Physician (i.e. account-contact) affiliations as a single record within a list. This feature provides an intuitive interface for users to retrieve customer information, create Siebel Target lists, and plan future calls.
- **Hospital department support**. Affiliated Accounts can be displayed as Hospital Departments along with the corresponding Physicians who are affiliated to these departments.

- **Hospital-Physician targeting information.** For a given targeting period (such as half year), Hospital - Physician targeting lists can be created by administrators and distributed to sales representatives for use within their targeting and call planning processes. Targeting information, such as call frequencies, detail frequencies and targeting flags, can be displayed for each hospital-physician record. Administrators can modify these attributes as business needs change and Sales representatives can plan their calls using these targeting attributes as guiding parameters.
- **Weekly calendar with call-planning capabilities.** The application provides an intuitive and user-friendly Weekly call planning user interface which enables sales representatives to plan and visualize all the activities for their hospital-physician targets within a specific time period. New calls can be created by double clicking within the Call Planning screen. Sales representatives can also enter and report basic call data, (such as products detailed and samples dropped within the same screen), and submit the call if no additional information is required.
- **Contact call with account information.** The standard contact call view has been enhanced to include account information. This feature allows sales representatives to capture detailed call data for a hospital-doctor record, such as promotional items dropped or decision issues.

About Account Contacts

The Siebel Pharma Account Contacts functionality supports the display of account-contact affiliations as a single record within dedicated Accounts Contacts List views, and also within an Accounts Contacts Weekly Call Planning screen. The Account-Contact records displayed in these screens are managed within the Siebel Pharma application as a set of separate Targeting records for each Sales Representative Position. These Targeting records store the relationship between the Account-Contact affiliation and Sales Representative Position. The records also have a series of Product Targeting attributes fields for each Account-Contact-Position relationship which store Product targeting information such as Detail Frequency targets.

The Targeting Period and related Accounts Contacts Targeting records needs to be created by an administrator, and then Targeting Period activated in order to make the Accounts Contacts Targeting records visible to end users. Administrators can create multiple Targeting Periods (and their related Accounts Contacts Targeting data) within the Siebel Pharma application, but only one Targeting Period can be active at any one time. The Targeting data can be manually created and setup through administration screens. However, a series of dedicated Siebel EIM tables are also provided to support the batch loading of the Targeting data. This method is the typical process for creating the data within the Siebel Pharma application.

Configuring Workflows for Account Contacts

The Siebel Pharma Account Contacts functionality utilizes Siebel Workflows in order to create and activate the Targeting lists. The application needs to be correctly configured to activate these workflows. The following topics describe how to configure and validate the Siebel Pharma application to set up Siebel Pharma Accounts Contacts functionality:

- *Activating Workflows for Account Contacts*
- *Enabling Server Components for Account Contacts*

Activating Workflows for Account Contacts

LS Pharma JPN Targeting Period Activation workflow must be activated to create and activate the Targeting periods and the Accounts Contacts lists.

To activate workflows for account contacts, make sure the LS Pharma JPN Targeting Period Activation Workflow Process is active. For more information, see *Siebel Business Process Framework: Workflow Guide*

> **Note:** You only need to perform this procedure the first time you want to access the Accounts Contacts feature. The workflow remains activated the next time you use this feature.

Enabling Server Components for Account Contacts

The Account Contacts functionality also requires that a number of Siebel Pharma Application Server components be enabled to support the Workflows. These components are as follows:

- Workflow Action Agent
- Workflow Monitor Agent
- Workflow Process Batch Manager
- Workflow Process Manager
- Workflow Recovery Manager

To activate workflows for account contacts

1. Navigate to the Administration - Server Configuration screen, then the Servers view.
2. Click the Components tab and query for Workflow* in the Components field.

   The query returns the agent and manager records associated with the accounts contacts. All should have a status of Enabled.
3. Click Manual Start if any one of the components is Inactive.

   > **Note:** If you cannot see the Status field, then click Menu (the cogwheel icon), select Columns Displayed from the drop-down list, and add the appropriate fields that you want displayed in the view.

Managing Account Contacts

The following topics describe the key tasks required to manage account contacts:

- *Loading and Distributing Account Contacts Targeting Data*
- *Creating a New Targeting Period*
- *Creating Account Contacts Targeting Product Data*
- *Generating Column Maps for Display of Product Attribute Fields*
- *Activating New Account Contacts Targeting Data*

- *Creating Account-Contact Target List Records Manually*
- *Creating Account Contacts Call Detail Records*

Loading and Distributing Account Contacts Targeting Data

When a new Targeting period begins, the administrator must load and distribute the Accounts Contacts Targeting data. The database administrator (DBA) then loads the new Target data into the Siebel Pharma application through Accounts Contacts Targeting EIM tables.

To load and distribute Account Contacts targeting data

1. Create a new Targeting Period record in the Accounts Contacts screen, then the Administration screen, and retrieve the Row Id for the new Targeting Period record.
2. Use the Row Id to create a set of Accounts Contacts Targeting Product records in a flat file that includes the following information:
   Targeting Period Id
   Account Id
   Contact Id
   Position Id (for Sales Representative)
   Product Id
   Product Targeting attributes.
3. Send the flat file to the database administrator (DBA) who loads the new Target data into the Siebel Pharma application through Accounts Contacts Targeting EIM tables.
4. Validate that the data is correct after the Targeting data is loaded into the application.
5. Use the Accounts Contacts Administration screens to set the Display Names for each of the Targeting Product Attributes.
6. Generate the corresponding column mappings for the Siebel Pharma Application to display the Product Attributes within the Accounts Contacts list screens.
7. Activate the current Targeting Period to create and distribute the Accounts Contacts Targeting lists to the end users.

Creating a New Targeting Period

In order to load and activate a new set of Accounts Contacts target lists and targeting information a new Accounts Contacts Period record must first be created by the administrator.

To create and set up a new targeting period

1. Create a new period for Account Contact Planning as follows:
   a. Navigate to the Administration - Data screen, then the Periods view.
   b. Create a new period and complete the following fields on the form that appears:
      - **Period.** Enter a name for the period.
      - **Start.** Enter the start date for the period.

- **End.** Enter the end date for the period.

2. Set up the period for account-contact affiliation as follows:

   a. Navigate to the Accounts Contacts screen, then the Administration view.
   b. In the Administration list, create a new record and complete the necessary fields.

      Some fields are described in the following table.

Field	Comments
Period	Select a target period from the Pick Period dialog and click OK.
Name	Enter a name for the contact.
Description	Enter a description for the accounts contact.
Status	(Read only) Indicate the status of this period. (In Progress, Lock, Active, Obsolete, Error).
Request Id	(Read only) The activation process identification number. Drill down into the Process Information screen to check the status of the activation process.
Error Messages	(Read only) Displays an error message if the activation process fails.

   c. Select Help, then About Record, and note the Record # (Row Id) of the new period.

      This Row Id is used by the Administrator to create a flat file which maps the new Period to the new Accounts Contacts Target List and Targeting information so that the data can be loaded through the Accounts Contacts EIM tables. For more information about importing data with Siebel EIM, see *Importing Data with Siebel EIM*.

Creating Account Contacts Targeting Product Data

For each Targeting Period, a series of Targeting Product data records for each Account, Contact, and Sales Representative Positions needs to be created in order to generate the Targeting lists used by the end users. A Targeting Product is any Product being targeted to an Account Contact by a Sales Representative which needs to be tracked in terms of Targeting attributes (for example, Call Frequency targets) as part of the Sales Force's Targeting process. There are four Targeting Product attribute fields defined in the application which can be used to store and manage the Targeting Attribute values associated to a Target Product for a specific Account-Contact-Position (Sales Representative) relationship. By default, only the two numeric Targeting Attribute fields are enabled and are displayed in the Accounts Contacts list screens.

The following task explains how to manually enter the Targeting Product records in the Accounts Contacts Administration screens. The values for each of the Account-Contact-Position Targeting Attributes fields can be loaded through the Accounts Contacts EIM tables.

To create targeting product data for account-contact-position relationship

1. Navigate to the Accounts Contacts screen, then the Administration view.
2. Select a record from the Account Contacts Period list and drill down on the Period column.
3. In the Product Data applet, create a new record and complete the necessary fields.
   Some fields are described in the following table.

Field	Comments
Full Name	Select a name from the Pick Contact dialog box, and click OK.
Sales Representative	Select a position from the Pick Position dialog box, and click OK.
Product	Select a product from the Pick Product dialog box, and click OK.
Numeric Attribute 1	Use the calculator to enter the first numeric attribute. For example, enter the numeric value for number of Sales Calls.
Numeric Attribute 2	Use the calculator to enter the second numeric attribute. For example, enter the numeric value for number of Product Details.
Text Attribute 1	Enter a text value to use as a product attribute.
Data Time Attributes 1	Enter a date value to use as a product attribute.

Generating Column Maps for Display of Product Attribute Fields

For each Product Attribute field, a common Display name value can be mapped to all the available Target Products. This Display name mapping is then used to automatically generate the Product Attribute Column labels displayed to the end users in the Accounts Contacts lists. The Display name for each of these Target Products' attribute fields is generated by combining the Product Name for each Targeting Product with the common Display name value defined by the administrator for the Product Attribute field. Once the Product Attribute labels are generated, an administrator can still edit the final display labels if minor updates are required before activating the Targeting Period.

The Targeting Product attributes used by the Sales Force can change from one Targeting Period to another. The application supports the ability to use the same attribute fields across all Targeting Periods, but define different labels for these fields for different Targeting periods. For example, a pharmaceutical company can decide to display the following information to the end users in the Accounts Contacts list screens:

- In the first quarter, they might display the number of visits by product
- In the second quarter, they might display the number of samples by product
- In the third quarter, they might display the number of primary details by product

Note: While the labels can change, the underlying Targeting Product Attribute columns are the same. For this reason, it is important for the administrator to track how the attributes columns and labels are mapped for Targeting period.

Create column map for Accounts Contacts List

1. Navigate to the Product Attributes screen.
2. Check the Mapped Field column to select the field to be used to generate the column map.
3. Enter the Display Name as the postfix to the column display name.
4. Click the Generate button to generate column mapping in the Column Map view.
   Some fields are described in the following table.

Field	Comments
Mapped Field	Check to select Product Data field used to display on Accounts Contacts List after activation.
Field	(Read only) Product data field column.
Display Name	Postfix of the Column Display Name in the Accounts Contacts List. This field will append to the product name in the generated column map.

5. Edit the Display Name in the Column Map view.
   Some fields are described in the following table.

Field	Comments
Product	(Read Only) Product Name
Source Field	(Read Only) Product data field
Target Field	(Read Only) Mapped field in Accounts Contacts List view
Display Name	Column Display Name of this product attribute in Accounts Contacts List view

Activating New Account Contacts Targeting Data

To allow end users to view and use the new Accounts Contacts Targeting data, the administrator must activate the Targeting Period. When a new Targeting Period is activated, the existing period becomes obsolete. Only the Targeting data for the active Targeting Period is visible to end users in the Accounts Contacts list screens. The activation process

assigns an account-contact record to a Sales Representative's Position only if the Position is already part of both the Account and Contact teams. If this relationship already exists, then a targeting record is created for the Sales Representative's Position and all remaining targeting attributes are added to this record.

To activate a Targeting Period

1. Navigate to the Accounts Contacts screen, then the Administration view.
2. Select a period record from the list.
3. From the view drop-down list, select Mapping and Activation.
4. Click the Activate button on the list.

   The Server Request should be displayed in the Request Id field and the Status field should change to In Progress.
5. After a few minutes, refresh the screen to verify that Workflow processes have completed and the Period status has changed to Active.
6. Select the Accounts Contacts List tab.
7. From the view drop-down list, select All Accounts Contacts Across Organization.
8. Verify that the current Targeting Period's Accounts Contacts Targeting data has been created correctly.

Creating Account-Contact Target List Records Manually

Once a Target Period has been successfully activated, each Sales Representative will be able to view their list of Account-Contact-Targeting Product records for the current Targeting period in the Accounts Contacts list view. A user can also manually create new target list records for Account - Contact affiliations in the Accounts Contacts list.

To create a target list for account-contact affiliations

1. Navigate to the Accounts Contacts, then the Accounts Contacts List view.
2. In the Accounts Contacts list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
New	Indicates when a new Account Contact record is created for the current position.
Sales Rep	The sales representative to whom this account contact is associated.
Account Name	From the Pick Account Contact dialog, select the appropriate Account - Contact Affiliation. **Note:** Only affiliations where the Sales Representative's Position on both the Account and Contact teams will be displayed in this dialog.
Account Location	The location of the account contact.
Contact Primary Speciality	Primary speciality of the contact.

Field	Comments

Creating Account Contacts Call Detail Records

The Accounts Contacts list displays the Account-Contact records with their targeting Product attributes for the current Targeting Period. The records in the list are limited to Account-Contact targeting records created for the current user's Position.

Users can create a Call record directly from the Accounts Contacts List applet. The New Call button on the Accounts Contacts List applet creates an Account Contact Call record with both the Account and Contact Ids populated. The created Call records are displayed in the Accounts Contacts Call Detail view under Activities.

To create Contact Call Details for a new Contact

1. Navigate to the Account Contacts screen, then the Accounts Contacts List view.
2. Select an Account Contacts record from the list.
3. Click New Call.

   A new Contact Call Detail record is created and the Contact Call Detail view is displayed.
4. Click Sign.

   If all business rules are valid, signature capture window is launched. Verify the contact's name, address, DEA number and license number displayed in the call header.
5. Click Submit to submit the call. If Samples were dropped a Signature will need to be entered before the call can be submitted. For more information, see *Recording a Contact Call for a Different Contact at the Time of Signature Capture*.

Planning Calls in the Call Planning Screens

Japanese sales representatives generally plan their Account Contact calls a week or more at a time. For ease of viewing and editing, they prefer to use a calendar that displays Accounts Contacts on the vertical axis and days of the week along the horizontal axis. The Accounts Contacts Call Planning screen enables sales representatives to easily view and plan their Account-Contact calls. Users can double-click any of the cells within the calendar grid (Gantt Chart) to easily and quickly create a call record for an Account-Contact on a given day of the week or month.

From the following Call Planning screens, sales representatives can see whether other sales representatives have also scheduled calls for a particular Account-Contact, Account, or Contact which allows Sales teams to plan their joint sales efforts more effectively:

- Account Contacts Call Planning
- Account Call Planning
- Contact Call Planning

Managers can also view the planned and completed Sales calls for all of their direct reports, allowing them to better monitor Sales Representatives' activities and suggest any changes as needed.

The calls displayed on the Call Planning screens are color-coded, so that sales representatives can monitor the status of a particular activity. When a call is submitted, the activity color is automatically refreshed, and the record is locked.

To plan a call in the Call Planning screens

1. Navigate to the Calendar screen, then one of the following views as required:
   - Accounts Contacts Call Planning
   - Account Call Planning
   - Contact Call Planning
2. In the weekly Calender grid, double-click the intersection cell corresponding to the (Account Contact, Account, or Contact) record on the Day for which you want to create the Call record.
3. The application creates a Call detail record and displays it in the applet which appears after the Call Planning calendar (Gantt Chart).

   For example, the application creates one of the following Call detail records:
   - Account-Contact Call detail record
   - Account Call detail record
   - Contact Call detail record

After an activity is created for a given contact or account, the name of the contact or account is displayed on the activity that appears on the calendar (Gantt Chart) in Siebel Open UI.

Calls created in this manner have the following characteristics:

- **Account and/or contact name.** The account name and/or contact name corresponding to the (account-contact, account, or contact) record selected.
- **Start date and time.** The day corresponding to the day selected on the calendar (Gantt Chart). The time for all calls scheduled on this view is set to the start of the work day, as entered on the User Profile Calendar View.

  Some of the fields displayed in the List area on the Call Planning calendar grid (Gantt Chart) are described in the following table.

Field	Comments
Account	The name of the Account (for Account Contact Call Planning).
Name	Displays the name of the Contact (for Account Contact or Contact Call Planning) or Account (for Account Call Planning). If you click the Name link, the Contact Details screen is displayed showing details of the call contact.
Sales Rep	The Sales Representative position associated to the Account Contact, Account, or Contact record.
Primary Speciality	Primary speciality of the contact (for Contact Call Planning).

The buttons available before the Call Planning calendar grid (Gantt Chart) are:

Button	Comments
2	Switches the daily display to two hourly intervals. The default daily display interval is one hour.
4	Switches the daily display to four hourly intervals. The default daily display interval is one hour.
Day	Shows the daily view of calls scheduled.
M/D	Switches between the daily and monthly view of calls scheduled.
Save Template	Saves all the calls to a template for all current Account Contact records between a Start and Finish date set by the user.
Apply Template	Applies a selected template from a start date set by the user. The template is applied to the same day for which it is saved. For example, if you save a template from August 8-9 (the start date is August 8), and then apply the template on August 13, then the template is applied to the nearest (start-to-end date), which is August 14-15.
Go to Reporting	Switches to reporting mode. For more information, see *Switching to Reporting Mode in the Account Contacts Call Planning Screen*. **Note:** This button is available in the Accounts Contacts Call Planning view only.

Updating Calls in the Call Planning Screens

Sales representatives use the Call Planning screens to update calls and report completed calls. Information for Products Detailed and Samples Dropped is displayed after the Call Planning calendar grid (Gantt Chart) for the currently selected Call record. A sales representative can quickly and easily update this information before submitting the completed call all within the same Call Planning screen.

Note: The following procedure shows you how to update calls in the Accounts Contacts Call Planning view, but the procedure is similar when using the Account Call Planning or Contact Call Planning view.

To update call records in the Call Planning screens

1. Navigate to the Calendar screen, then the Accounts Contacts Call Planning view.
2. In the Accounts Contacts Call Planning view, single click on a previously created Call record in the calendar grid.

3. The application displays the selected Call record in the form on the calendar grid.
4. Update the fields in the form for the completed Call as necessary.
5. In the Products Detailed applet, enter a value in the Priority column for each Product detailed during the Call. All other Product Detailed records will be deleted when the Call is submitted.
6. If Samples were dropped during the call, then in the Samples Dropped applet, specify a lot number and quantity for the dropped samples.
7. If Samples were dropped, enter a Signature before you submit the call.
8. Click Submit to submit the call.

Selecting and Moving Activities on the Calendar

When you select and move an activity or call from one time slot to another on the calendar grid (Gantt Chart), the start time and end time for the activity or call changes accordingly. In addition, the overall position of activities on the calendar changes.

When you select and move an activity from one account or contact to another account or contact, then the activity displayed on the calendar shows the name of the new account or contact.

Deleting Calls in the Call Planning Screens

Sales representatives can use the Call Planning screens to delete calls. A sales representative can quickly and easily update this information in a weekly view for multiple accounts.

> **Note:** The following procedure shows you how to delete a call in the Accounts Contacts Call Planning view, but the procedure is similar when using the Account Call Planning or Contact Call Planning view.

To delete a call

1. Navigate to the Calendar screen, then the Accounts Contacts Call Planning screen.
2. Select the calls that you want to delete.
3. Delete the records.

Displaying Calls Created by Other Representatives

Sales representatives can use the Call Planning screens to display calls created by other representatives.

> **Note:** The following procedure shows you how to display calls created by other representatives in the Accounts Contacts Call Planning view, but the procedure is similar when using the Account Call Planning or Contact Call Planning view.

To display calls created by other representatives

1. Navigate to the Calendar screen, then the Accounts Contacts Call Planning screen.
2. Navigate through the calendar view.

All inactive entries represent calls created by other representatives.

Switching to Reporting Mode in the Account Contacts Call Planning Screen

Sales representatives can use the Accounts Contacts Call Planning screen to switch to reporting mode. A sales representative can quickly and easily switch modes by clicking one button.

To switch to reporting mode and submit calls

1. Navigate to the Calendar screen, then the Accounts Contacts Call Planning view.
2. Click Go to reporting mode.
3. Report the call information:
   a. Select the call from the list.
   b. Enter product details.
   c. The Start Date field will be pre-populated with the current date. Change it to a different date, where appropriate.
   d. Enter the number of minutes in the Duration field.
   e. Enter any decision issues in the Decisions Issues field.
   f. Select a status from the Status list.
   g. Enter any additional comments in the Comments field.
4. Click Submit to submit the call.

Customizing the Call Planning Calendar

You can customize the Call Planning calendar grid (Gantt Chart) by navigating to the User Preferences screen, then the Calendar view. The following procedure describes the parts of the calendar that you can customize and format to suit your own business needs.

To customize the calendar

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Click the Calendar tab.
   The Calendar form appears. The following table describes the fields on the Calendar form, which you use to customize and format the calendar grid (Gantt Chart).

Field	Comments
Working Hours Start At	Enter the time at which you start the working day. Your working hours are denoted by a line that represents the beginning of your workday, and a line that represents the end of your workday.

Field	Comments
Working Hours End At	Enter the time at which you end the working day. Your working hours are denoted by a line that represents the beginning of your workday, and a line that represents the end of your workday.
Appointment Duration	Select an activity length (15, 30, 45, 60, 90, 120 minutes). All activities scheduled on the calendar will automatically have this default duration.
First Day of Week	Select the day to start the working week (for example, select Sunday or Monday). Complete this field when Default Calendar is set to Weekly or Monthly.
Default Calendar	Select a default calendar format. The Calendar screen will appear in the default calendar format every time you access the Calendar screen. o If you set Default Calendar to Daily, then select the time interval for activity periods in the calendar from the drop-down list in the Time Interval (Minutes) field. o If you set Default Calendar to Weekly, then do the following: - Select the default weekly calendar format from the drop-down list in the Weekly Calendar View field. - Select the time interval for activity periods in the calendar from the drop-down list in the Time Interval (Minutes) field. - Select the first day of the week to appear in the calendar from the drop-down list for the First day of week field. - Select the week days to appear in the calendar by selecting (or deselecting) the check box next to each day of the week in the Workdays section. o If you set Default Calendar to Monthly, then select the first day of the week to appear in the calendar from the drop-down list for the First Day of Week field.
Default User	If you spend most of your time accessing another users's calendar, then set up that user's calendar as your default calendar as follows: o Click the select button in the Default User field. The Pick Default User dialog box appears. o Select the appropriate user, and then click OK. That user's login appears in the Default User field, and that user's calendar appears as your default calendar in the Calendar screen.
Weekly Calendar View	Select the default weekly calendar format from the drop-down list. Complete this field when Default Calendar is set to Weekly.

Field	Comments
Time Interval (Minutes)	Select the time interval for activity periods (15, 30, 60 minutes) in the calendar from the drop-down list. Complete this field when Default Calendar is set to Daily or Weekly.
Participant Email Prompt	To be prompted to send email messages to meeting participants when a new appointment is created or an existing appointment is modified, then do one of the following as required: o Select the check box next to the Participant Email Prompt field to set up email prompts for meetings. o Deselect the check box next to the Participant Email Prompt field to disable email prompts for meetings.
Participant Chart Display	Choose Working Hours or 24 Hours from the drop-down list. In the Calendar screen (Gantt Chart), only your work hours or all 24 hours of the day will be displayed.
Workdays	Select the week days to appear in the calendar by selecting (or deselecting) the check box next to each day of the week as required. Complete this field when Default Calendar is set to Weekly.

For more information about using the calendar including how to configure and customize it, see *Siebel Fundamentals* .

14 Analyzing Syndicated Data

Analyzing Syndicated Data

This chapter covers the following topics:

- *About Analyzing Syndicated Data*
- *Scenario for Analysis*
- *Process of Analysis*
- *Views in the Analysis Screen*

About Analyzing Syndicated Data

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.

Scenario for Analysis

This topic outlines an example process performed by the Siebel administrator and end users. Your company might follow a different process 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 theSiebel 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.

Process of Analysis

This topic details sample tasks often performed by administrators and end-users working with the Analysis screen. Your company might follow a different process according to its business requirements.

Administrator Procedure

The following administrative procedure is described in this topic:

- *Defining Payer and Plan Information*.

Other administrator procedures, applicable to the data used in the Analysis screen, are described elsewhere:

- *Showing Presentations Using the PCD Viewer*.
- *Creating a Data Extraction Rule*. Extract portions of data according to territory assignments.
- *Specifying the Data to Route to Mobile Users*. Send the compressed data extracts to mobile users.
- (Optional) Updating responsibilities. For general information about responsibilities, see *Siebel Security Guide* .
- Associating positions to bricks. See *Administering Bricks*.

End-User Procedures

The following list shows tasks end users typically perform using the Analysis screens:

- *Importing Syndicated Data Files*.
- *Analyzing Brick-Level Syndicated Data*.
- *Working with Sales, Rx, and Call Data*.

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.

This task is a step in *Process of Analysis*.

To create a payer

1. Navigate to the Administration - Application screen, then the Payer view.
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	Three types are supported: Total, Plan, and Payer.

Field	Comments
Name	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 create a new account for the payer in the Pick Account dialog box.
Account Site	The location of the plan.
IMS Id	The identifier assigned to the plan by the syndicated data provider.

Importing Syndicated Data Files

If data extracts have been routed to the end users by the Siebel administrator, the end users receive notification when they synchronize your local database. During synchronization, the data extracts are downloaded to their hard drives (as attachments), where they are stored until you import them. After they import the data into their local databases, the files are deleted from their hard drives.

> **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, select File, then Synchronize, and then click Setup in the Siebel Remote dialog box.

This task is a step in *Process of Analysis*.

To import syndicated data extracts

1. Navigate to the Syndicated Data Files screen.

   > **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.

Analyzing Brick-Level Syndicated Data

This task is a step in *Process of Analysis*.

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, then Bricks view, is determined by the user's position and the bricks that the administrator has associated with that position. For more information, see *Administering Bricks*.

Displaying All Contacts Associated with a Brick

The following procedure shows you how to display the contacts associated with a brick.

To display all contacts associated with a brick

1. Navigate to the Analysis screen, then the Bricks Analysis List view.
2. From the view drop-down menu, select Bricks Rx Analysis.
3. Select a brick in the Bricks list.
4. Click the Contacts tab.

   The Contacts list displays all contacts associated with the selected brick.

Correlating Actual Calls Made with Indirect Sales By Brick

The following procedure shows you how to correlate the actual call made with indirect sales by brick.

To correlate actual calls made with indirect sales by brick

1. Navigate to the Analysis screen, then the Bricks Analysis List view.
2. Select a brick in the Bricks list.
3. Click the Indirect Sales by Brick 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.

Correlating Actual Calls Made With Prescription Trends By Brick

The following procedure shows you how to correlate the actual call made with prescription trends by brick.

To correlate actual calls made with prescription trends by brick

1. Navigate to the Analysis screen, then the Bricks Analysis List view.
2. Select a brick in the Bricks list.
3. Click the Rx Trend by Brick 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 *Views in the Analysis Screen*, 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 the table in the topic *Importing Syndicated Data Files*.

This task is a step in *Process of Analysis*.

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 *Planning Calls* for information on targeting.

   Note: By default, Siebel Pharma displays (and charts) all available data appropriate to the selected Analysis view. It is recommended 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.

Views in the Analysis Screen

In Siebel Life Sciences, the availability of certain views can be limited according to each user's responsibilities. Therefore, the views you see might differ from those shown and described in the following table.

Note: Analysis data is read-only. Data refresh cycles are determined by your company's business process and data availability.

The following table describes the functions of the views in the Analysis screen. Your responsibilities determine which views are available to you.

View	Functions
All Market screen, then the Direct Sales Trend by Territory - Volume view	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.

View	Functions
All Markets screen, then the Direct Sales Trend by Account - Volume view	For representatives, displays internal product sales data at the account level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Territory - Volume view	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 screen, then the Indirect Sales Trend by Territory - Share view	For managers, displays product sales data at the territory level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Brick - Volume view	For representatives, displays product sales data at the brick level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Brick - Share view	For representatives, displays market share data at the brick level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Postal Code - Volume view	For representatives, displays product sales data at the ZIP Code level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Postal Code - Share view	For representatives, displays market share data at the ZIP Code level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Account - Volume view	For representatives, displays product sales data at the account level over a selected period of time.
All Markets screen, then the Indirect Sales Trend by Account - Share view	For representatives, displays market share data at the account level over a selected period of time.
All Markets screen, then the Rx Trend by Territory - Volume view	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 screen, then the Rx Trend by Territory - Share view	For managers, displays product Rx trends in a territory.
All Markets screen, then the Rx Trend by Prescriber - Volume view	For representatives, displays product Rx trends by prescriber.
All Markets screen, then the Rx Trend by Prescriber - Share view	For representatives, displays product Rx trends by prescriber.
All Markets screen, then the Rx Trend by Plan and Territory - Volume view	For managers, displays product Rx trends by plan and territory.
All Markets screen, then the Rx Trend by Plan and Territory - Share view	For managers, displays product Rx trends by plan and territory.

View	Functions
All Markets screen, then the Rx Trend by Plan and Prescriber - Volume view	For representatives, displays product Rx trends by plan and prescriber.
All Markets screen, then the Rx Trend by Plan and Prescriber - Share view	For representatives, displays product Rx trends by plan and prescriber.
All Markets screen, then the Rx Trend by Payment Type and Prescriber view	For representatives, displays product Rx trends by the payment types associated with prescriptions and prescribers.
All Markets screen, then the Rx Trend by Payment Type and Territory view	For both representatives and managers, displays product Rx trends by the payment types associated with prescriptions.
Activities screen, then the Account Detailing view	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.
Activities screen, then the Contact Detailing view	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 screen, Bricks Rx Analysis, and then the Rx Trend by Brick view	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 screen, Bricks Rx Analysis, and then the 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 screen, Bricks Rx Analysis, and then the Rx Trend by Brick-Product TRx view	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 screen, Bricks Sales Analysis, and then the Indirect Sales by Brick view	For representatives, displays indirect sales data at the brick level for the brick selected on the Bricks list.
Bricks screen, Bricks Sales Analysis, and then the Indirect Sales Trend by Product Value view	For representatives, displays indirect sales data at the brick level for the selected product and for the brick selected on the Bricks list.
Bricks screen, Bricks Sales Analysis, and then the Indirect Sales Trend by Product Units view	For representatives, displays indirect sales data at the brick level for the selected product unit and for the brick selected on the Bricks list.

15 Tracking Time Off Territory

Tracking Time Off Territory

This chapter covers the following topics:

- *About Tracking Time Off Territory*
- *Scenario for Time Off Territory*
- *Process of Tracking Time Off Territory*
- *Configuring Time Off Territory*

About Tracking Time Off Territory

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.

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 Pharma, time off territory records appear in the Activities screen and in views that display activities. For more information about activities, see *About Creating Activities*.

Scenario for Time Off Territory

This scenario is an example process performed by two types of end users, a field sales representative and his or her regional sales manager. Your company might follow a different process according to its business requirements.

A sales representative for a pharmaceutical company has been invited to a two-day, out of town seminar. She speaks to her manager and they decide she should attend it. The sales representative then 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.

Process of Tracking Time Off Territory

This topic details sample tasks often performed by end-users when tracking time off territory. Your company might follow a different process according to its business requirements.

When tracking time off territory, end users typically perform the following tasks:

- *Creating a Time Off Territory Record*. Typically, the sales representative creates a record for all of the days she will be attending the seminar.
- *Submitting a Time Off Territory Record*.

The regional sales manager uses Siebel Time Off Territory to:

- *Viewing Time Off Territory Charts*. The regional sales manager can review the time off territory records that have been submitted to the system.

Once the sales representatives submit time off territory records to the system, Siebel Pharma:

- Creates a new time off territory record in the Activities list.
- For each time off territory record, creates an all-day appointment in the calendar.

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.

Creating a Time Off Territory Record

End users must create 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 create one record for a conference attended in the morning and another for vacation time taken in the afternoon.

This task is a step in *Process of Tracking Time Off Territory*.

To create a time off territory record

1. Navigate to the Time Off Territory screen.
2. Create a new record and complete the necessary fields.
   Some fields are described in the following table.

Field	Comments
Description	The reason for the time off.
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.
Status	The status of a time off request.

Field	Comments
	End users cannot select Submitted. For more information on changing the status of a record to Submitted, see *Submitting a Time Off Territory Record*.

The new time off territory record appears in the Activities lists and in the calendar.

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.

This task is a step in *Process of Tracking Time Off Territory*.

To submit a completed time off territory record

1. Navigate to the Time Off Territory screen.
2. Select the record you want to submit.
3. Click Submit and then OK.

   The status of the time off territory record changes to Submitted and the record becomes read-only.

Viewing Time Off Territory Charts

Managers and end users can view graphical charts of time off territory information by clicking the Charts tab. Using these charts is an effective way see trends and patterns.

For Siebel Mobile Web Client: If your routing rules are not configured to route employee time off territory records to managers, employees can give calendar access to their managers so that managers working remotely can view their teams' time off territory records.

> **Note:** Routing rules can no longer be edited in the Administration - Siebel Remote screen. For help with editing routing rules, contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance from Oracle's Application Expert Services.

This task is a step in *Process of Tracking Time Off Territory*.

To view time off territory charts

1. Navigate to the Time Off Territory screen.
2. From the view drop-down list, select My Team's Time Off Territory.
3. Click the Charts tab.
4. From the drop-down lists that appear after the Time Off Territory 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.
- 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 might 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 notifications chapter in *Siebel Applications Administration Guide* .
- Enter additional selections to the Reason drop-down list. For more information about Lists of Values, see *Siebel Applications Administration Guide* .

16 Managing Pharma Medical Education Events

Managing Pharma Medical Education Events

This chapter covers the following topics:

- *About Managing MedEd Events*
- *MedEd Terminology*
- *About MedEd Event Types*
- *Scenario for MedEd Events*
- *Process of Managing MedEd Events*

About Managing MedEd Events

This chapter describes how a pharmaceutical company can use Siebel Pharma Medical Education (Siebel MedEd) to plan all aspects of a medical education event.

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 *Scenario for MedEd Events*.

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 can 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 can 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.

Scenario for MedEd Events

This topic outlines an example process performed by a Siebel MedEd administrator and end users. Your company might follow a different process 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
- 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

Process of Managing MedEd Events

This topic details sample tasks often performed by administrators and end users when managing MedEd events. Your company might follow a different process according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform to manage MedEd events. The administrator night 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. *Establishing Funds for MedEd Plans*
2. *Creating Master MedEd Plans*
3. *Creating a MedEd Activity Template*
4. *Administering MedEd Literature*
5. *Designating MedEd Event Speakers*

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. *Setting Up a MedEd Plan*
2. *Setting Up MedEd Events*
3. *Tracking Costs of MedEd Activities*
4. *Setting Up Sessions Within a MedEd Event*
5. *Inviting and Registering Prospective MedEd Attendees*
6. *Generating Correspondence for MedEd Event Invitees*
7. *Scheduling Calls to an Invitee*

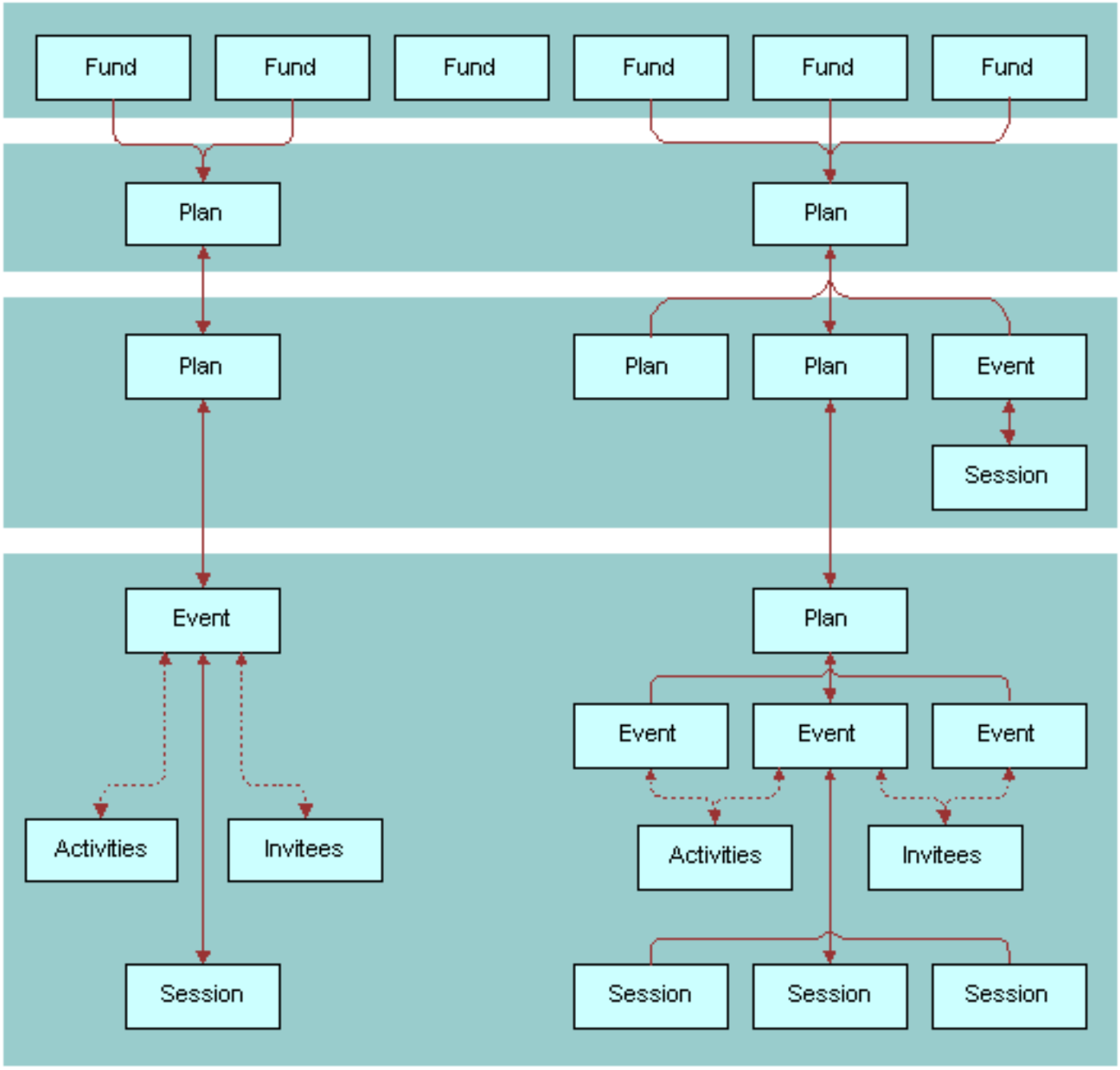
Establishing Funds for MedEd Plans

This task is a step in *Process of Managing MedEd Events*.

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.

The following image shows the possible relationships between MedEd funds, plans (primary and subplans) events, sessions, activities, and invitees:

- Funds are made up of Plans.
- Plans are made up of Events or subplans; subplans in turn are made up of events.
- Events are made up of Sessions, Activities, and Invitiees.



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 *Siebel 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 *Siebel Enterprise Integration Manager Administration Guide* 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 *Establishing Funds for MedEd Plans*.

To verify that a fund is available for association with a MedEd plan

1. Navigate to the Administration - Data screen, then the MedEd Planning view.
2. In the Plans list, select a plan.
3. In the Plan Administration form, click the multiple select button in the Funds field.

   All active funds listed in the S_MDF table appear.
4. Verify the fund you want is available and then close the dialog box.

Creating Master MedEd Plans

This task is a step in *Process of Managing MedEd Events*.

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*.

To create a MedEd master plan

1. Navigate to the Administration - Data screen, then the MedEd Planning view.
2. Click the Plan Administration tab.
3. In the Plan Administration form, create a new record and complete the necessary fields.

   Some fields 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.

Field	Comments
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

This task is a step in *Process of Managing MedEd Events*.

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

- Create an activity template of type Pharma ME Event.

  For information about how to create activity templates, see *Siebel 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. The following table shows the location, field name, and list of values type for some MedEd drop-down lists.

Lists of Values for MedEd Settings

Views	Field Name	List of Values Type	Comments
MedEd Events screen, then the More Info view	Accreditation	LS_ME_EVT_ACCREDT_CD	Organizations that give Continued Medical Education (CME) credits for attending MedEd events.
MedEd Events screen, then the More Info view	Dress Code	LS_ME_EVT_DRESS_CD	Appropriate types of dress for MedEd events.
MedEd Events screen, then the More Info view	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 Administration - Data screen, then the MedEd Event Details view.
MedEd Events screen, then the More Info view	Type	LS_ME_EVT_TYPE_CD	Types of MedEd events.
MedEd Events screen, then the Invitees view	Role	LS_ME_INV_ROLE_CD	Roles that invited contacts or employees fill for MedEd events.
MedEd Events screen, then the Event Details view MedEd Events screen, then the Invitees view	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.
MedEd Events screen, Invitees tab, and then Sessions MedEd Events screen, then the Sessions tab	Registration Status Status	LS_ME_SES_REG_STAT_CD	Status of invitees for individual sessions within MedEd events.
MedEd Events screen, then the Sessions tab, drill down on Session Name, and then the Contacts list	Email	LS_ME_REG_EMAIL_CD	Status of email registration for an attendee.
MedEd Events screen, Event Details, and then the Materials list	Item	LS_ME_SES_MAT_CD	Materials or equipment that might be needed for MedEd sessions.
MedEd Events screen, Sessions view, and then the Sessions list	Status	LS_ME_SES_STAT_CD	Status of individual sessions within MedEd events.

Views	Field Name	List of Values Type	Comments
MedEd Plans screen, then the More Info tab MedEd Plans screen, then the Plan Explorer tab	Plan Status	LS_ME_STAT_CODE	Status of a MedEd funding plan.

If you need to create a new value in the list of values, follow the procedures on modifying a list of values in *Siebel Applications Administration Guide* .

Administering MedEd Literature

This task is a step in *Process of Managing MedEd Events*.

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 Sciencesrepository
- 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 *Specifying Literature for a MedEd Session*.

To add a literature item to the application

- Follow the procedure for adding literature records in the *Siebel Applications Administration Guide* .

Designating MedEd Event Speakers

This task is a step in *Process of Managing MedEd Events*.

Both administrators and end users can 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 *Managing Contacts in Life Sciences*

To designate a contact as a MedEd speaker

1. Navigate to the Contacts screen, then the Contacts List view.
2. From the view drop-down list, select All Contacts.

   > **Note:** Depending on your responsibilities, you can also use the My Contacts, My Team's Contacts, or the All Contacts Across Organizations filters.

3. In the Contacts list, select the Speaker field for the contact you want to designate as a speaker.

   The application lists the contact as a possible speaker for MedEd sessions.

Reviewing the List of Available Speakers

You can review a list of all designated speakers.

To review all available speakers

1. Navigate to the MedEd screen, then the All Speakers view.

   The Speakers list shows all contacts that have been designated as speakers. This is a read-only list.
2. Review the information about the speakers.

Setting Up a MedEd Plan

This task is a step in *Process of Managing MedEd Events*.

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*.

Creating a MedEd Plan

The following procedure shows you how to create a MedEd plan.

To create a Med Ed plan

1. Navigate to the MedEd screen, then the MedEd Plans view.
2. In the MedEd Plans list, create a new record and complete the necessary fields.

   Some fields 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.
Plan Name	The name of the MedEd plan for which team members can associate event costs with a given fund.

Field	Comments
Products	Products to be promoted with the funds supplied under this plan.
Status	Status of the plan. Defaults to Active.

3. In the form, enter any additional details.

   The application automatically creates an unique alphanumeric value for the Plan ID.

Creating a Subplan

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, then the MedEd Plans view.
2. In the MedEd Plans list, drill down on the Name of the plan for which you want to specify a subplan.
3. In the Sub-Plans list, create a new record and complete the necessary fields.

   Some fields 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 want 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 *Siebel Applications Administration Guide* .
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.

4. Go to the Events applet.

   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 topic, *Setting Up MedEd Events*.

Setting Up MedEd Events

This task is a step in *Process of Managing MedEd Events*.

A MedEd event is a database record that describes an educational event attended by physicians or medical professionals. An event can 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 Pharma Sales Analytics product can use cost allocations as input when creating return on investment (ROI) analysis reports.

Note: Users who have purchased and installed the optional MedEd for Customers module can also display MedEd event information to selected professionals on their Physician Portal Web site.

Creating a MedEd Event

The following procedure shows you how to create a MedEd event.

To create a MedEd event

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, create a new record and complete the necessary fields.

   Some fields 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 MedEd for Customers, 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.

Field	Comments
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 MedEd for Customers, this field appears on the Physician Portal Web site.
Fee Required	Indicates whether the event requires an attendance fee.
Location	City and address or venue where the event is to take place. For MedEd for Customers, 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 can be allocated across team members as well as across product lines. For more information, see *Allocating Event Costs Across Team Members*.
Name	The name of the event. If you are using MedEd with MedEd for Customers, this field appears to selected contacts on your Physician Portal Web site.
Objective	The overall goal for the people attending the event. For MedEd for Customers, this field appears on the Physician Portal Web site.
Products	One or more products targeted for discussion at the event.Event costs can be allocated across products. For more information, see *Allocating Event Costs Across Product Lines*.
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 MedEd for Customers, this field appears on the Physician Portal Web site.
Status	Indicates whether the event is active, cancelled, completed, in progress, inactive, or planned. For MedEd for Customers, this field appears on the Physician Portal Web site.

Field	Comments
	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 screen, then the MedEd Event Details.
Type	The category of medical education event being offered. For MedEd for Customers, this field appears on the Physician Portal Web site.

3. In the MedEd Team field, click the multiple select button.

   All available team members appear in the Event Team dialog box.

Allocating Event Costs Across Team Members

The following procedure shows you how to allocate event costs across team members.

To allocate event costs across team members

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Cost Allocation tab.
4. 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%.

5. Select your own record, specify a plan, and then click OK.

   Each MedEd Team member must log in to Siebel Life Sciences, and specify which MedEd plan will be charged for his or her portion of the event's costs.

Allocating Event Costs Across Product Lines

The following procedure shows you how to allocate event costs across product lines.

To allocate event costs across product lines

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. In the Product field, click the multiple select button,

   The Products dialog box appears.
4. In the Products dialog box, add one or more products that will be discussed at the event.
5. 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%.

Tracking Costs of MedEd Activities

This task is a step in *Process of Managing MedEd Events*.

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*.

Creating an Activity Plan for a MedEd Event

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 Med Ed event

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Activity Plans tab.
4. In the Activity Plans list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
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 *Siebel Applications Administration Guide* .

5. If this event involves activities that are not included in the selected activity plan template, click the Activities tab.
6. In the Activities list, create a new record and complete the necessary fields.

   Many activity fields are not applicable to MedEd events and can remain blank.

   Some fields are described in the following table.

Field	Comments
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.

7. Repeat Step 6 until all activities have been specified.

Recording the Cost of an Activity

The following procedure shows you how to record the cost of an activity.

To record the cost of an activity

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event for which you want to record the cost.
3. Click the Activities tab.
4. In the Activities list, select the activity for which you want to supply cost information
5. Go to the Cost field, and enter the cost of the activity.

Viewing Aggregated Activity Costs For a MedEd Plan

The following procedure shows you how to view the aggregated activity costs for a MedEd plan.

To view aggregated activity costs for a Med Ed plan

1. Navigate to the MedEd screen, then the MedEd Plans view.
2. In the MedEd Plan list, drill down on a plan for which you want to view aggregated costs.
3. In the MedEd Plan form, click Actual Cost.

   The Actual Cost and Remaining Budget fields are updated in the form.

Setting Up Sessions Within a MedEd Event

This task is a step in *Process of Managing MedEd Events*.

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 MedEd for Customers 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 MedEd for Customers 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 in the Invitee view.

Creating a MedEd Event Session

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, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Sessions tab.
4. In the Sessions list, create a new record and complete the necessary fields.

   Some fields 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 MedEd for Customers, 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 MedEd for Customers, this field appears on the Physician Portal Web site.

Field	Comments
Session Objective	Overall goal for the participants attending the session. For MedEd for Customers, 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 MedEd for Customers, 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 *Creating a Contact*. For MedEd for Customers, the value of this field combined with the value of the Speaker First Name and appears on the Physician Portal Web site.
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 MedEd for Customers, this field appears on the Physician Portal Web site.
Status	Indicates whether the session is active, canceled, completed, in progress, or inactive. For MedEd for Customers, 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.

Specifying Literature for a MedEd Session

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*.

To specify literature for a MedEd session

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Sessions tab.
4. In the Sessions list, drill down on a session for which you want to specify literature.
5. In the Literature list, create a new record and complete the necessary fields.

Specifying Materials for a MedEd Session

In addition to literature, each session can require certain equipment and other materials, such as flip charts, markers, projectors, and screens. You might want 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, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Sessions tab.
4. In the Sessions list, drill down on a session for which you want to specify materials.
5. In the Materials list, create a new record and complete 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*. Drop-down values are normally added and maintained by an administrator.

Inviting and Registering Prospective MedEd Attendees

This task is a step in *Process of Managing MedEd Events*.

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 MedEd for Customers 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 MedEd for Customers, the Invitee information indicates that the call center agents or sales representatives need to convey the invitation to the invitee.

Inviting a Contact to a MedEd Event

The following procedure shows you how to invite a contact to a MedEd event.

To invite a contact or an employee to a MedEd event

1. Navigate to the MedEd screen, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Invitees tab.
4. In the Contacts list, create a new record and complete the necessary fields.

   a. In the Role field, select the value that best describes each individual's role at the session.
   b. 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.

Registering an Invitee for a MedEd Session

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 MedEd for Customers 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 *Inviting a Contact to a MedEd Event*.
2. In the Contacts list, select the contact (invitee) to be registered.
3. Click the Sessions tab.
4. In the Sessions list, create a new record and complete the necessary fields.
5. In the Registration Status field, change the status to Confirmed.

   Repeat Step 3 through Step 5 for each additional session the invitee will attend.

Generating Correspondence for MedEd Event Invitees

This task is a step in *Process of Managing MedEd Events*.

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, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Invitees tab.
4. Perform one of the following:
   - Query for the invitees to whom you want to send correspondence.
   - From the application-level menu, select Edit, then Select All to select all the people invited to the MedEd event.
5. From the application-level menu, select File, then Send Letter.

   The Correspondence Recipients list shows all the invitees you selected in Step 4.
6. In the Correspondence List, select a correspondence template and complete the necessary fields.

Scheduling Calls to an Invitee

This task is a step in *Process of Managing MedEd Events*.

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, then the MedEd Events view.
2. In the MedEd Events list, drill down on an event.
3. Click the Invitees tab.
4. In the Contacts list, query for the invitees with whom you want to schedule a call.
5. Click the Schedule button.
6. 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.

17 Setting and Achieving Objectives

Setting and Achieving Objectives

This chapter covers the following topics:

- *About Setting and Achieving Objectives*
- *Scenario for Objectives*
- *Process of Setting Up Objectives*

About Setting and Achieving Objectives

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.

Objectives can have child objectives associated with them. For example, an overall objective of increasing prescriptions of a particular product might have associated sub-objectives of increased calls to certain contacts or accounts and improved education on product issues.

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.

Scenario for Objectives

This scenario is an example process performed by a pharmaceutical district manager and sales representatives to create and fulfill sales objectives. Your company might follow a different process 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 creates 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 and sales representatives can review the objective.

Process of Setting Up Objectives

This topic details sample tasks often performed by administrators and end users when working with objectives. Your company might follow a different process according to its business requirements.

Administrator Procedures

The following list shows tasks typically performed by district managers or marketing administrators. Although some companies choose to allow sales representative to create their own objectives.

1. *Creating an Objective*
2. *Creating Recommended Activities for an Objective*
3. *Targeting Accounts to an Objective*
4. *Loading Actual Amount Fields Using EIM*

End-User Procedures

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

1. *Creating an Objective*
2. *Reviewing Objectives*
3. *Charting Objectives*

Creating an Objective

This task is a step in *Process of Setting Up Objectives*.

You must complete this task before performing the remaining tasks in this chapter. If you need an objective to recur, see *Creating Recurring Objectives*.

To create an objective

1. Navigate to the Objectives screen.
2. Create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Parent Objective	If this objective is a subgoal of another objective, select the parent objective. The parent objective defines some of the criteria for all of its child objectives. For example, child objectives are constrained to the products associated with the parent objective, if any. You can create parent objectives without completing the Parent Objective field. You *must* complete the Parent Objective field when creating child objectives. 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.
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.
Start Date	The start date of an objective. It must fall within the objective's time period. This field is automatically updated if the Period field is changed.
End Date	The ending date of an objective. It must fall within the objective's time period. This field is automatically updated if the Period field is changed.
Period	The period of time during which an objective must be completed.
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.
Organization	The organization will constrain the target accounts that will be available to associate with the objective.
Team	Multiple people can be assigned to the objective's team.

Field	Comments
Business Plan	If this objective is associated with a business plan for a managed-care account, enter the plan name.

Creating Recurring Objectives

At some time you might want 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 a workflow to schedule monthly calls. For general information about workflows, see *Siebel Business Process Framework: Workflow 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.

Creating Recommended Activities for an Objective

This task is a step in *Process of Setting Up Objectives*.

You can create one or more recommended activities for an objective. These recommended activities are a guide for sale representatives. Sales representatives can review this list and create similar activities for their accounts and contacts targeted for the objective.

To create recommended activities for an objective

1. Navigate to the Objectives screen.
2. In the Objectives list, drill down on the objective for which you want to create an activity.
3. Click the Activities tab.
4. In the Activities list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Fields	Comments
Type	The type of activity to be performed; for example, an assessment or presentation.
Assessment Template	If the recommended activity requires an assessment to be carried out, the relevant assessment template should be added here.

Fields	Comments
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*.

Targeting Accounts to an Objective

This task is a step in *Process of Setting Up Objectives*.

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 in the chart view.

Note: For general information on creating and applying target lists, see *Siebel Applications Administration Guide* .

To specify target accounts or contacts for an objective

1. Navigate to the Objectives screen.
2. In the Objectives list, drill down on an objective.
3. Click the Targets tab.
4. Create new target accounts and contacts for the objective as follows:
    a. Click the Target Accounts tab, create new target account records and complete the necessary fields. You can select multiple records in the Add Accounts dialog box.
    b. Click the Target Contacts tab, create new target contact records and complete the necessary fields. You can select multiple records in the Add Contacts dialog boxes.

    Note: You can also add accounts through the Target Accounts view (click Commit) and the Account Status view. You can also add contacts through the Contacts Status view.
5. In the Objective form, click Schedule to automatically create and schedule calls to the targeted accounts and contacts.

    The account calls and contact calls are scheduled for the current date and time.
6. Navigate to the Calendar screen, then the Daily view, and edit the start and end times for the account and contact call records.

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 *Importing Data into Life Sciences*.

Loading Actual Amount Fields Using EIM

This task is a step in *Process of Setting Up Objectives*.

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* .

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 and fields visible to the end users in the Objectives screen are identical to those available to the administrator.

This task is a step in *Process of Setting Up Objectives*.

To review objectives

1. Navigate to the Objectives screen.
2. From the view 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
3. Drill down on an objective.
4. Use the following tabs to review recommended activities, target accounts, and other information about the objectives:

    Activities, Target Contacts, Target Accounts, Account Status, Attachments.

Charting Objectives

During the campaign, managers and sales representatives can graph objective data.

This task is a step in *Process of Setting Up Objectives*.

To chart objectives

1. Navigate to the Objectives screen.
2. In the Objectives list, select the objective whose status you want to review.

3. Click the Charts tab.

   From the view drop-down list, choose an available chart.

18 Importing Data into Life Sciences

Importing Data into Life Sciences

This chapter covers the following topics:

- *Scenario for Importing Data*
- *Process of Importing Data*
- *Importing, Extracting, and Routing Syndicated Data*
- *Extracting Data for Mobile Users*
- *Troubleshooting Syndicated Data Loading*
- *Views Requiring Syndicated Data Import*
- *Data Loading Matrix for Syndicated Data*
- *Importing Syndicated Data Files*

In this chapter, you will learn how to import data into your Siebel Life Sciencesdatabase.

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 Enterprise Application Integration (EAI) is used. Siebel Enterprise Integration Manager, one method of EAI, is a subsystem in the Siebel Life Sciencessoftware that manages the exchange of data betweenSiebel 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 Sciencesdatabase 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 the table in *Views Requiring Syndicated Data Import*.

Scenario for Importing Data

This scenario is an example of the tasks performed by the database administrator, the application administrator, and the sales representatives. Your company might follow a different sequence according to its business requirements.

The database administrator (DBA) transfers company data into theSiebel Life Sciences interface data tables. The Siebel EIM transfers the data to theSiebel 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.

Process of Importing Data

This topic details sample tasks performed by database and application administrators and end users when importing data.

Administrator Procedures

The following list shows tasks administrators typically perform to import data:

1. *Importing Data with Siebel EIM*
2. *Importing, Extracting, and Routing Syndicated Data*
3. *Extracting Data for Mobile Users*

End-User Procedure

- *Importing Syndicated Data Files*

Importing Data with Siebel EIM

This task is a step in *Process of Importing Data*.

Siebel EIM manages the exchange of data between Siebel database tables and other corporate databases. This topic provides information specific toSiebel 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 the following figure.

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 Business Application database, read *Data and Related Interface Tables*. For further details on Siebel Industry Application interface tables, such as the contents of each table, read *Siebel Enterprise Integration Manager Administration Guide* .
2. Using EIM, you transfer the data from the interface tables to predefined destination columns in the base tables of the Siebel Life Sciencesdatabase. 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* .

Recommended Import Order

To correctly establish the relationships between dependent data elements, the data should be imported in the following recommended order. 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:

1. Reference data (therapeutic classes, competitive metrics, and so on)
2. Employees
3. Notifications
4. Products (both internal and external)
5. Leads
6. Medical specialties
7. Insurance plans
8. 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 Administration - Syndicated Data screen, you can define complex routing rules for syndicated data.

The following table shows the relationships between the data, interface tables, and base tables.

Data	Interface Table	Base Table	Table Description
Accounts Contacts	EIM_TGT	S_TGT	Accounts Contacts Targeting List
Accounts Contacts	EIM_TGT_ADMIN	S_TGT_ADMN	Targeting Period
Accounts Contacts	EIM_TGT_ADMIN	S_TGT_ITM_ADMN	Accounts Contacts - Targeting Products
Accounts Contacts	EIM_TGT_ADMIN	S_GT_COL_MAP	Targeting Product Column Mappings
Account Details	EIM_ACCNT_DTL	S_ORG_EXT	Organization
Account Details	EIM_ACCNT_DTL	S_ORG_EXT_LSX	1:1 Extension table for Account Types
Account Details	EIM_ACCNT_DTL	S_ORG_EXT_X	1:1 Account Best Times to Visit
Activities	EIM_ACTIVITY	S_EVT_ACT	Activities
Activities	EIM_ACTIVITY1	S_EVT_ACT	Activities Only User Key
Activities	EIM_ACTIVITY1	S_ACT_SIGN	Signatures
Activities	EIM_ACTIVITY2	S_EVT_ACT	Activities Only User Key

Data	Interface Table	Base Table	Table Description
Activities	EIM_ACTIVITY2	S_ACT_PRDINT	Activity Products
Activities	EIM_ACTIVITY2	S_ACT_ISS	Activity Issues
Activities	EIM_ACTIVITY2	S_ACT_PROD_ISS	Issues for Activity Products
Addresses	EIM_ADDR_ORG	S_ADDR_ORG	Account Addresses including Bricks
Agreements and Contracts	EIM_AGREEMENT	S_DOC_AGREE	Agreements and Contracts
Agreements and Contracts	EIM_AGREE_LS	S_DOC_AGREE	Contracts
Agreements and Contracts	EIM_AGREE_LS	S_AGREE_PAY	Contract Payments
Agreements and Contracts	EIM__ENTLMNT	S_ENTLMNT	Entitlements and Contract Price Group
Agreements and Contracts	EIM__ENTLMNT	S_ENTLMNT_ITEM	Price Group Products
Agreements and Contracts	EIM__ENTLMNT	S_ENTLMNT_FEE	Nonproduct Fees
Agreements and Contracts	EIM__ENTLMNT	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
Chat and Discussions	EIM_DISCN_LS	S_TOPIC_CON_LS	Chat User Registration
Chat and Discussions	EIM_DISCN_LS	S_MESG_BRD_LS	Message Board
Clinical	EIM_CL_ACT_LS	S_EVT_ACT	Clinical Activity Columns
Clinical	EIM_CL_DSGN_LS	S_CL_DSGN_LS	Clinical Designs
Clinical	EIM_CL_PGM_LS	S_CL_PGM_LS	Clinical Programs
Clinical	EIM_CL_PGM_LS	S_CL_PGM_ATT_LS	Clinical Program Attachments
Clinical	EIM_CL_PGM_LS	S_CL_PGM_APP_LS	Clinical Program Applications
Clinical	EIM_CL_PTCL_LS	S_CL_PTCL_LS	Clinical Protocols

Data	Interface Table	Base Table	Table Description
Clinical	EIM_CL_PTCL_LS	S_CL_PTCL_LSXM	1:M Protocol Extension Table
Clinical	EIM_CL_PTCL_LS	S_CL_PTL_ATT_LS	Clinical Protocol Attachments
Clinical	EIM_CL_PTCL_LS	S_CL_PTL_POS_LS	Clinical Protocol Positions
Clinical	EIM_CL_PTCL_LS	S_CPTCL_DSGN_LS	Clinical Protocol Designs
Clinical	EIM_CL_SUBJ_LS	S_CL_SUBJ_LS	Clinical Subjects
Clinical	EIM_CL_SUBJ_LS	S_CL_SUBJ_ST_LS	Clinical Subject Status
Clinical	EIM_CL_SUBJ_LS	S_CL_SJ_CSNT_LS	Clinical Subject Consent
Clinical	EIM_CL_SUBJ_LS	S_CL_SBJ_ATT_LS	Clinical Subject Attachments
Clinical	EIM_PTL_SITE_LS	S_PTCL_SITE_LS	Clinical Protocol Sites
Clinical	EIM_PTL_SITE_LS	S_PTL_ST_POS_LS	Clinical Protocol Site Positions
Clinical	EIM_PTL_SITE_LS	S_PTL_ST_ATT_LS	Clinical Protocol Site Attachments
Clinical	EIM_PTL_SITE_LS	S_PTL_ST_CON_LS	Clinical Protocol Site Contacts
Clinical	EIM_PTL_SITE_LS	S_PS_STMPVER_LS	Clinical Protocol Site Template Versions
Clinical	EIM_PTL_SITE_LS	S_CL_ACT_EXC_LS	Clinical Protocol Site Activity Exceptions
Clinical	EIM_PTL_SITE_LS	S_CL_PYMNT_LS	Clinical Payments
Clinical	EIM_SBJ_TMPL_LS	S_SUBJ_TMPL_LS	Subject Templates
Clinical	EIM_SBJ_TMPL_LS	S_SBJTMP_VER_LS	Subject Template Versions
Clinical	EIM_TMPL_PLNITM	S_TMPL_PLAN_ITEM	Subject Template Visits
Companies	EIM_ACCOUNT	S_ORG_EXT	Organization
Companies	EIM_ACCOUNT	S_ACCNT_POSTN	Position for Account

Data	Interface Table	Base Table	Table Description
Companies	EIM_ACCOUNT	S_ADDR_ORG	Account Addresses
Companies	EIM_ACCOUNT	S_ORG_REL	Account Affiliations
Companies	EIM_ACCOUNT1	S_ORG_EXT	Organization Only User Key
Companies	EIM_ACCOUNT1	S_ACCNT_CLS_RNK	Account Ratings and Rankings
Companies	EIM_ACCOUNT1	S_ACCNT_MED_PROC	Account Medical Procedures
Companies	EIM_ACCOUNT1	S_ACCNT_MED_SPEC	Account Medical Specialties
Contacts	EIM_CONTACT	S_CONTACT	Contacts
Contacts	EIM_CONTACT	S_ADDR_PER	Contact Addresses
Contacts	EIM_CONTACT	S_CONTACT_REL	Contact Affiliations
Contacts	EIM_CONTACT	S_PER_ORG_UNIT	Contact to Account Affiliations and Roles
Contacts	EIM_CONTACT	S_STATE_LIC_LS	Contact State Licenses
Contacts	EIM_CONTACT1	S_CONTACT	Contacts Only User Key
Contacts	EIM_CONTACT1	S_POSTN_CON	Contact Positions
Contacts	EIM_CONTACT1	S_CON_ADDR	Contact Address Usage
Contacts	EIM_CON_DTL	S_CONTACT	Contacts Only User Key
Contacts	EIM_CON_DTL	S_CONTACT_LSX	1:1 Contacts Extension Table
Contacts	EIM_CON_DTL	S_CONTACT_LSXM	1:M Contacts Extension Table
Contacts	EIM_CON_DTL	S_ACCNT_CON_ATT	Accounts Contacts File Attachments
Contacts	EIM_CON_DTL	S_NOTE_ACCT_CON	Accounts Contacts Notes
Formularies	EIM_FRMULRY_LS	S_FORMULARY	Formulary Opportunities

Data	Interface Table	Base Table	Table Description
Formularies	EIM_FRMULRY_LS	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
Medical Education	EIM_ME_EVT_LS	S_ME_EVT_LS	MedEd Events
Medical Education	EIM_ME_EVT_LS	S_ME_EVT_POS_LS	MedEd Event Positions
Medical Education	EIM_ME_EVT_LS	S_ME_EVT_PRD_LS	MedEd Event Products
Medical Education	EIM_ME_EVT_LS	S_ME_EVT_INV_LS	MedEd Event Invitees
Medical Education	EIM_ME_PLN_LS	S_ME_PLN_LS	MedEd Plans
Medical Education	EIM_ME_PLN_LS	S_ME_PLN_MDF_LS	MedEd Plan Funds
Medical Education	EIM_ME_PLN_LS	S_ME_PLN_PRD_LS	MedEd Plan Products
Medical Education	EIM_ME_SES_LS	S_ME_SES_LS	MedEd Sessions
Medical Education	EIM_ME_SES_LS	S_ME_SES_PRD_LS	MedEd Session Products
Medical Education	EIM_ME_SES_LS	S_ME_SES_INV_LS	MedEd Session Invitees
Medical Education	EIM_ME_SES_LS	S_ME_SES_LIT_LS	MedEd Session Literature
Medical Education	EIM_ME_SES_LS	S_ME_SES_MAT_LS	MedEd Session Materials
Medical Procedures	EIM_PROC_LS	S_MED_PROC	Medical Procedures
Medical Specialties	EIM_SPEC_LS	S_MED_SPEC	Medical Specialties
Objectives	EIM_ACCT_SRC	S_ACCNT_SRC	Target Accounts for Objectives
Objectives	EIM_CONTACT2	S_CONTACT	Contacts Only User Key
Objectives	EIM_CONTACT2	S_CAMP_CON	Target Contacts for Objective
Objectives	EIM_SRC	S_SRC	Objectives

Data	Interface Table	Base Table	Table Description
Objectives	EIM_SRC	S_SRC_POSTN	Objective Positions
Products	EIM_PROD_INT	S_PROD_INT	Products-Details, Samples, Markets, Lots, and Promotional Items
Products	EIM_PROD_INT1	S_PROD_INT	Products
Products	EIM_PROD_INT1	S_PROD_POSTN	Personal Product List
Products	EIM_PROD_INT1	S_PROD_REL	Product Relations
Samples	EIM_SAMPLE_LS	S_SAMPLE_TXN	Sample Transactions
Samples	EIM_SAMPLE_LS	S_MPL_TXN_ITEM	Sample Transaction Item
Samples	EIM_POSITION	S_POSTN	Positions
Samples	EIM_POSITION	S_STOCK_POSTN	Stock Inventory by Position
Samples	EIM_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 *Siebel Enterprise Integration Manager Administration Guide* , which lists the contents of each table referred to in the previous table:

- 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

This task is a step in *Process of Importing 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 that allows either full or partial table-level extraction. Using views in the Administration - Syndicated Data 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* .

The views that require syndicated data import are shown in the table in the topic *Views Requiring Syndicated Data Import*.

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 Sciencesdatabase.
   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

This task is a step in *Process of Analysis*.

Before you can view syndicated data in Siebel Business 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 Business 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 Business 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. The following table shows all of the foreign key fields, their corresonding foreign key table, and describes what the field contains for Siebel Life Sciences.

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

Field	Table	Description
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 Business 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.ctl 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 the table in the topic *Loading Data into the Siebel Life Sciences Database*. 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.

About 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 start of the hierarchy needs to see all of the syndicated data in the system. This might 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 topics.

In addition to loading summary records, you also must configure the table in the Siebel runtime repository, 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 high level data and work down.

Extracting Data for Mobile Users

This task is a step in *Process of Importing Data*.

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.

> **Note:** Insurance plan data (S_INS_PLAN table) might not be extracted for a specific mobile if syndicated data (S_SYND_DATA table) is loaded to the server at the same time a database extract component is running for the mobile client. In addition, if there is no account associated to the insurance plan data, then insurance data for a specific mobile can not be extracted. The data extraction rule, (dock object MedicalInsPlan, rule # 3) controls how insurance plan data is routed. If an account is associated to an insurance plan record and mobile has visibility over that account, the insurance plan data is successfully extracted.

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.

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 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.

Creating a Data Extraction Rule

Use the following procedure to create a data extraction rule.

This task is a step in *Process of Analysis*.

To create a data extraction rule

1. Navigate to the Administration - Syndicated Data screen, then the Export Rules view.
2. In the Rules list, create a new record and complete the necessary fields.
   Some fields are described in the following table.

Field	Comments
Name	A descriptive name for the rule.

Field	Comments
Outfile Id	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.

Associating Nodes with an Extract Rule

Use the following procedure to associate nodes with an extract rule.

To associate nodes with an extract rule

1. Navigate to the Administration - Syndicated Data screen, then the Export Rules view.
2. In the Rules list, select the correct rule.
3. Click the Nodes tab.
4. In the Nodes list, create a new record and complete the necessary 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.

Field	Comments

Specifying the Data to Route to Mobile Users

Use the following procedure to specify the data that is routed to mobile users.

This task is a step in *Process of Analysis*.

To specify the data that is routed to mobile users

1. Navigate to the Administration - Syndicated Data screen, then the Export Rules view.
2. In the Rules list, select the correct rule.
3. Click the Tables tab.
4. In the Tables list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Table Name	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	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].
	
	An example WHERE string definition that uses the Position Id variable follows. This example extracts data where the position ID in the syndicated data is equal to the position ID of the user. For example:
	
	`WHERE T.POSITION_ID = [Position Id]`
	
	The following example 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. For example:
	
	`WHERE EXISTS (SELECT 1 FROM <TableOwner>.S_PARTY_PER R WHERE R.PARTY_ID = T.POSITION_ID AND R.PERSON_ID = [Employee Id])`

Sequence	Enter a numeric value that defines the order in which tables will be extracted.
Active	Only tables specified as active will be processed.

Field	Comments

5. Click the SQL Statements tab, then click the Pre SQL Statements tab.
6. In the Pre SQL Statements list, create a new record and compete the necessary fields.

   Some fields are 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 is to be extracted, use the DELETE FROM table function. If only a subset of the data is to be extracted (for example, the latest month's data), use a where clause to specify the data subset. **Note:** Each SQL statement must be prefixed with the table owner SIEBEL. If you do not include the table owner, the syndicated data import process fails.
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 function. Use the DELETE FROM function instead.

Setting the Environment

Use the following procedure to set the environment.

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 might 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 the following table 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* .

> **Note:** Syndexp command line arguments are case sensitive. Also, arguments that contain path names or spaces should be enclosed in double quotes (`""`).

Argument	Meaning	Comments
/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. This File System parameter can use the absolute path to the **\att** directory or the Universal Naming Convention (UNC). Examples: o **syndexp /f "d:\Siebel\FS\att"** o **syndexp /f \\MACHINENAME\FS\att**
/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

Argument	Meaning	Comments
/R	Read Consistency	Default: N
/S	Use Sequence Number	Default: N
/T	Data File Type	Default: compressed
/U	Username	Required
/V	AppServer name	Required. This is the logical name of the Siebel Server (not the host name).
/X	Appserver Home Directory	Default Environment Variable: SIEBEL_HOME

Performing a Data Extraction

Use the following procedure to preform a data extraction.

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 the table in the topic *Setting the Environment* to define multiple variables that are specific to the user environment. For example:

   ```
   syndexp /U sadmin /P <password> /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 (navigate to the Syndicated Data Files view) 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 can 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 might 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 can occur without warning. You might not be able to automatically determine the success or failure of a particular transfer. As a result, sales representatives might be using incorrect data for up to several months without realizing it.

Troubleshooting Syndicated Data Loading

If the Siebel Business Application client session locks or terminates during a syndicated data file import, do the following procedure.

To fix a session lock 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 topic lists theSiebel Life Sciences views and business components that require data import and indicates which data values must be loaded into the syndicated data table.

The following table shows the views that require data import.

Screen	View	Business Component
Accounts	Charts, then Sales	Pharma Sales Consumption
Accounts	Charts, then Profitability	Pharma Consumption
Analysis	Direct Sales Trend by Territory - Volume	Pharma GA Sales Consumption
Analysis	Direct Sales Trend by Account - Volume	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Territory - Volume	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Territory - Share	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Zip - Volume	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Zip - Share	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Brick - Volume	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Brick - Share	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Account - Volume	Pharma GA Sales Consumption
Analysis	Indirect Sales Trend by Account - Share	Pharma GA Sales Consumption
Analysis	Rx Trend by Territory - Volume	Pharma GA Rx Consumption
Analysis	Rx Trend by Territory - Share	Pharma GA Rx Consumption
Analysis	Rx Trend by Prescriber - Volume	Pharma GA Rx Consumption
Analysis	Rx Trend by Prescriber - Share	Pharma GA Rx Consumption
Analysis	Rx Trend by Plan and Territory - Volume	Pharma GA Rx Consumption
Analysis	Rx Trend by Plan and Territory - Share	Pharma GA Rx Consumption
Analysis	Rx Trend by Plan and Prescriber - Volume	Pharma GA Rx Consumption
Analysis	Rx Trend by Plan and Prescriber - Share	Pharma GA Rx Consumption
Analysis	Rx Trend by Payment Type and Prescriber	Pharma GA Rx Consumption

Screen	View	Business Component
Analysis	Rx Trend by Payment Type and Territory	Pharma GA Rx Consumption
Analysis	Rx Trend by Brick	Pharma GA Rx Consumption
Analysis	Indirect Sales by Brick-Share Indirect Sales by Brick-Volume	Pharma GA Markets Pharma GA Sales Consumption
Contacts	Rx Trend, then Rx Trend by Product	Pharma GA Rx Consumption
Contacts	Rx Trend, then Rx Trend by Product	Pharma Consumption
Contacts	PreCall, then Rx Trend PreCall, then Rx Trend and Formulary PreCall, then Rx Trend by Plan	Contact BC Pharma GA Rx Consumption
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.
Objectives	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 the first table in this topic and the Attribute by Data Source Matrix, shown in the second table in this topic, are provided to facilitate loading sales, Rx, profitability, and influence data. The first table 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.

View	Data Source	Mandatory ID	Plan Type
Accounts screen, Charts, and then the Sales view	SlsIndAct	Account Id	Total
Accounts, screen, Charts, then the Profitability view	Anlsys ROI	Account Id	Total
Analysis screen, Direct Sales Trend, and then the by Territory - Volume view	SlsDirTer	Territory Id	Total
Analysis screen, Direct Sales Trend, then by Account - Volume view	SlsDirAct	Account Id	Total
Analysis screen, Indirect Sales Trend, then by Territory - Volume view	SlsIndTer	Territory Id	Total
Analysis screen, Indirect Sales Trend, then by Territory - Share view	SlsIndTer	Territory Id	Total
Analysis screen, Indirect Sales Trend, then by Zip - Volume view	SlsIndZip	Zip Id	Total
Analysis screen, Indirect Sales Trend, then by Zip - Share view	SlsIndZip	Zip Id	Total
Analysis screen, Indirect Sales Trend, then by Brick - Volume view	S1sIndBrk	Area Id	Total
Analysis screen, Indirect Sales Trend, then by Brick - Share view	S1sIndBrk	Area Id	Total
Analysis screen, Indirect Sales Trend, then by Account - Volume view	SlsIndAct	Account Id	Total
Analysis screen, Indirect Sales Trend, then by Account - Share view	SlsIndAct	Account Id	Total
Analysis screen, Rx Trend, then by Territory - Volume view	RXTer	Territory Id	Total
Analysis screen, Rx Trend, then by Territory - Share view	RXTer	Territory Id	Total
Analysis screen, Rx Trend, then by Prescriber - Volume view	RXPrf	Contact Id	Total
Analysis screen, Rx Trend, then by Prescriber - Share view	RXPrf	Contact Id	Total
Analysis screen, Rx Trend, then by Plan and Territory - Volume view	RXTer	Territory Id	Plan

View	Data Source	Mandatory ID	Plan Type
Analysis screen, Rx Trend, then by Plan and Territory - Share view	RXTer	Territory Id	Plan
Analysis screen, Rx Trend, then by Plan and Prescriber - Volume view	RXPrf	Contact Id	Plan
Analysis screen, Rx Trend, then by Plan and Prescriber - Share view	RXPrf	Contact Id	Plan
Analysis screen, Rx Trend, then by Payment Type and Prescriber view	RXPrf	Contact Id	Payer
Analysis screen, Rx Trend, then by Payment Type and Territory view	RXTer	Territory Id	Payer
Contacts screen, Rx Trend, then the Rx Trend by Product*	RXPrf	Contact Id	Total
Contacts screen, then the Profitability view	Anlsys ROI	Contact Id	Total
Contacts screen, then the Sample Influence view	Anlsys EvsR	Contact Id	Total
Products screen, Product Profitability, then Sample ROI*	Anlsys ROI	Territory Id	Total
Products screen, then the Sample Influence view	Anlsys EvsR	Territory Id	Total
* Fourth level menu			

The following table indicates, by data source, the data values that should be loaded into the syndicated data table (S_SYND_DATA) attribute fields.

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	

Data Source	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5
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	
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	

Importing Syndicated Data Files

This task is a step in *Process of Importing Data*.

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 can 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* .

19 Capturing Adverse Events and Complaints

Capturing Adverse Events and Complaints

This chapter covers the following topics:

- *About Adverse Events and Complaints Management*
- *About Capturing Adverse Events and Complaints*
- *Scenario for Capturing and Escalating Adverse Events and Complaints*
- *Process of Capturing and Escalating Adverse Events and Complaints*
- *About Configuring Adverse Events and Complaints Capture*

About Adverse Events and Complaints Management

Adverse events and complaints management (AECM) is an important process in the regulated medical device and pharmaceutical industries. The FDA in the USA and similar agencies in other countries have specific requirements for capturing, investigating, reporting, and resolving adverse events and complaints on medical devices and drugs.

Poor handling of adverse events and complaints can lead to non-compliance penalties such as warning letters, restrictions, fines, and recalls.

Siebel Adverse Events and Complaints Management

Siebel Adverse Events and Complaints Management (Siebel AECM) is designed to manage the life cycle of an adverse event or a medical product complaint. Users collaborate and capture all of the necessary data to track the complaint through investigation to corrective action and generate the required regulatory reports. The following table outlines such a life cycle, where each step in the process represents a chapter in this book.

Process	Roles	Typical Activities
1. Capture adverse event or complaint	Call Center Agent	• Capture and verify customer contact information • Identify whether service request is potential adverse event or complaint • Capture adverse event and patient consequences; identify devices • Diagnose and solve problem • Assess the problem • Dispatch Field Engineer • Create RMA and replacement orders
2. Investigate adverse event or complaint	Quality or Regulatory Agency	• Review information for correctness • Identify FDA codes, other similar agencies codes, and internal codes to label the problem

Process	Roles	Typical Activities
		• Assess whether reportable • Perform trend analysis • Contacts customer for information • Coordinate investigation
3. Manage product analysis and CAPA	Product Analysis and CAPA Team	• Make sure receipt of product • Decontaminate devices • Ship devices to manufacturing or third party for analysis • Review complaints • Analyze the devices and records results • Approve analysis • Submit requests for CAPA
4. Report to regulatory agency	Quality or Regulatory Agency	• Verify and approve analysis • Assess whether problem is reportable • Complete information for regulatory reports • Generate and submit reports • Submit supplemental and annual reports
5. Manage customer communication	Call Center Agent or Quality or Regulatory Agency	• Notify customer about investigation • Identify all customers with potentially defective devices • Execute product recalls • Create communication materials for sales and regional offices
6. Close adverse event or complaint	Quality or Regulatory Agency	• Verify that all necessary activities are completed • Initiate complaint closure approval • Close complaint

Related Topics

Investigating Adverse Events and Complaints

Recording Product Analysis for Adverse Events and Complaints Management

Managing Corrective and Preventative Actions

Regulatory Reporting

Communicating with Customers for Adverse Events and Complaints Management

Closing Adverse Events and Complaints

Integration with Other Siebel Business Applications

Siebel AECM is integrated with Siebel Call Center, Siebel Sales, Siebel Field Service, and Siebel Clinical. This allows the flexibility to share varying levels of visibility to adverse event or complaint details, investigation status, and corrective action across different users and functions within the organization. The Siebel Audit Trail functionality keeps a record of changes made to records throughout the course of the investigation.

About Capturing Adverse Events and Complaints

This chapter describes capturing information about a medical product complaint or adverse event as a service request and then escalating that complaint as a product issue for further investigation.

One of the goals in capturing such information is to identify complaints accurately, making sure that all valid complaints are identified while at the same time minimizing the number of false-positive complaints that get escalated for investigation.

Siebel AECM Terms

The following table describes some important terms and abbreviations used in Siebel AECM.

Term	Description
Adverse Event	An adverse event is a customer event associated with a product malfunction or adverse reaction to a pharmaceutical. It can be initially captured as a service request and then escalated to a product issue (which becomes the complaint file associated with the event). In some places in this text, *complaints* includes both adverse events and complaints.
AECM	Adverse Events and Complaints Management
Call Center Agent	Another name for this job title is customer service agent. This agent is trained to identify a product complaint and distinguish it from a normal service or information request.
CAPA	Corrective and preventive action. This specifies the changes in product or process needed to resolve the root cause of the adverse event or complaint. For example, a CAPA could be a request from the analysis team for the correction of the manufacturing, design, or process flaw that caused the initial adverse event or complaint.
Complaint	A complaint is a customer event associated with a product malfunction. It can be initially captured as a service request and then escalated to a product issue (which becomes the complaint file associated with the event). In some places in this text, *complaints* includes both adverse events and complaints.
Initial regulatory report	The first report to a regulatory agency regarding a product complaint or an adverse event.

Term	Description
MDR	Medical device reports are required to be submitted to a regulatory agency when an adverse event or complaint is determined to be reportable.
MDV	Medical Device Vigilance
Medical Product	Examples of medical products are capital equipment, disposables, reagents, implanted devices, and pharmaceuticals.
MedWatch 3500A	U.S. Food and Drug Administration (FDA) report for mandatory reporting of adverse reactions and medical product problems by drug and biologic manufacturers and packers and by medical device manufacturers, distributors, importers, and user-facilities.
MedWatch 3500A Supplemental	A 3500A report sent as a follow-up to an initial 3500A report.
NCA	National Competent Authorities. Regulatory reports are often sent to these agencies. These country-specific agencies also report adverse events to each other.
Product Issue	A product issue is the adverse event or complaint file. The product issue is often first captured as a service request record. Then the information is transferred to a product issue record, which becomes the adverse event or complaint file.
Product Issue Assessments	A product issue assessment evaluates a product issue on defined criteria. For example, a product issue assessment can be used to determine whether the product issue should be reported to a regulatory agency.
Quality Manager	Other names for this job title are complaint investigator, regulatory affairs representative, safety and regulator manager, regulatory liaison, and quality group liaison.
Regulatory report	There are four types of regulatory reports supported by Siebel AECM (preconfigured): • MedWatch 3500A • MedWatch 3500A Supplemental • MDV Initial • MDV Follow-up **Regulatory report record.** The record in the Regulatory reports screen. **Regulatory report.** The report created using data contained in the regulatory report record. Other regulatory reports like CIOMS can be configured using other reporting tools.
Siebel AECM	The Siebel Adverse Events and Complaints Management module.
Signature capture	See User authentication.
SmartScripts	A SmartScript is a collection of predefined questions, answers, and branches that can be used to guide the quality manager through potentially complex decision making processes to arrive at a solution to a problem or query. For more information about SmartScripts, see *Siebel SmartScript Administration Guide* .

Term	Description
Inbox	The Inbox allows managers and other employees to view and approve items (of multiple types) from one screen. In Siebel AECM, the Inbox is used to approve product analyses. For more information, see *Siebel Applications Administration Guide* .
User authentication	The user authorization check captures and verifies the user's name and password. This user authentication is controlled by the LS Medical User Verification workflow. **Note:** User authentication is sometimes called signature capture, but should not be confused with electronic signature capture on mobile devices or tablet PCs used elsewhere in theSiebel Life Sciences application.

Scenario for Capturing and Escalating Adverse Events and Complaints

This scenario is an example workflow performed by the Siebel administrator and a call center agent. Your company might follow a different workflow according to its business requirements.

This workflow is designed to illustrate the functionality of Siebel AECM.

Introduction

A medical manufacturing company makes capital equipment for use in hospitals. The company has recently released a new blood analyzer system. The company manufactures both the instrument and the consumables.

The Siebel Administrator

In preparation for the new blood analyzer being released on the market, the Siebel administrator performs a number of preparatory administration tasks so that the product and all necessary codes and lot numbers are set up in the Siebel Business Application. In case the company has to file a 3500A report, the administrator refers to the MedWatch coding manual and sets up appropriate codes for event problems and evaluation.

The Siebel administrator also sets up the activity templates used by the call center agents to create activity plans for handling customer complaints. The Siebel administrator needs to have all these ready before the call center agents begin to receive calls about the product.

When troubleshooting and problem resolution information becomes available for the new blood analyzer, the Siebel administrator creates solution records that contain this troubleshooting information.

The Call Center Agent

A call center agent takes a customer call about a failing blood analyzer system.

In addressing the customer's complaint, the call center agent does the following:

- Enters a service request, recording details about the product and the failure.
- Works with the customer to troubleshoot the problem, searching the solution database for possible solutions. In this case, he finds a solution document about running a diagnostic test. The test does not resolve the problem, but it does indicate the repair that is needed.
- Creates an activity plan—a list of predefined activities—to dispatch a service engineer to the customer site.
- Dispatches a service engineer to make a repair to the analyzer.
- Sets up an RMA (return materials authorization) to return the cartridge and reagents that were in use when the analyzer failed.
- Reviews the report of the work done by the field engineer.

The call center agent has been trained to identify calls as potential complaints. He recognizes that this customer's problem needs to be escalated as a product issue. Before escalating, he reviews the information entered in the service request, making sure that the service request is classified correctly, for example, with accurate types and codes. When the call center agent creates the product issue from the service request record, the appropriate data is transferred from the service request to the product issue record.

Process of Capturing and Escalating Adverse Events and Complaints

This example process represents the tasks that are carried out in the *Scenario for Capturing and Escalating Adverse Events and Complaints*.

Administrator Procedures

The Siebel administrator sets up the service request functionality so that call center agents can capture adverse events and complaints. To do this, the Siebel administrator performs the following tasks:

- *Confirming Standard Setup for Service Requests*
- *Setting Up Codes*
- *Setting Up Lot Numbers for Medical Products*

End-User Procedures

To capture and escalate adverse events and complaints, end users perform the following tasks:

1. *Capturing Adverse Events and Complaints as Service Requests*

2. *Escalating Adverse Events and Complaints as Product Issues*
3. *Adding Complaint-Specific Information to Product Issues*

Confirming Standard Setup for Service Requests

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

Before service requests can be logged against products, the Siebel administrator sets up the following:

- **Products.** Records need to be set up for products against which there might be adverse events and complaints.
- **Product Lines and Categories.** Product lines and categories can both be associated with codes. If you configure your application to filter codes according to product line or category, make sure to set these up. For more about codes, see *Setting Up Codes*.
- **Assets.** Asset records should be set up for devices with serial numbers. Assets do not need to be set up for items such as consumables.
- **Activity Templates of type Service Request.** Call center agents use activity templates to create service request activity plans—sets of predefined and scheduled activities associated with service requests.
- **Solutions.** Many service requests are similar to previously addressed issues. Solution documents contain information about previously resolved requests.
- **LOVs for Type, Area, and Sub Area.** These fields are particularly important for classifying service requests. You can customize these LOVs.

You might have already completed these setup tasks for other reasons in Siebel Life Sciences. These setup tasks are standard in many Siebel Business Applications and are not unique to Siebel Life Sciences.

> **Tip:** To aid call center agents with information gathering and problem diagnosis associated with adverse events and complaints, you can set up SmartScripts. For more information about SmartScripts, see *Siebel SmartScript Administration Guide* .

Setting up Products, Product Lines, Categories, Assets, Activity Templates, Solutions, and LOVs

The following table shows what screen to use and where to go for further information when setting up products, product lines, categories, assets, activity templates, solutions, and LOVs.

To Set Up...	Use This Screen...	And for More Information, See...
Products	Product Administration	*Defining External Products* and *Siebel Product Administration Guide*
Product Lines	Product Administration screen, then Product Lines	*Siebel Product Administration Guide*
Categories	Catalog Administration	*Adding Products to Catalogs*
Assets	Assets	*Siebel Field Service Guide* , *Siebel Communications Guide*

To Set Up...	Use This Screen...	And for More Information, See...
Activity Plans of type Service Request	Data Administration screen, then Activity Templates	*Siebel Field Service Guide*
Solutions	Solution Administration	*Siebel Field Service Guide*
LOVs	Data Administration screen, then List of Values	*Siebel Applications Administration Guide*

Setting Up Codes

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

Codes allow you to codify many aspects of the AECM process. For example, codes are used to categorize the service request that triggers the adverse event or complaint, and codes are used to categorize the corrective actions initiated at the end of a complaint's life cycle.

Multiple codes and sometimes codes of multiple types can be specified in one code field.

Think carefully when designing and setting up your code system. Codes are used as search criteria for service requests and product issues.

According to your business needs, you can use:

- Industry codes such as FDA patient, device, method, results, and conclusion codes required for the MedWatch 3500A form
- Company-specific codes
- A combination of industry and company-specific codes

The following table outlines where code fields appear in the Siebel AECM module.

Screen	View	Field Name	Notes
Service Requests	More Info	Codes	None.
Product Issues	More Info	Codes	Copied from the service request when a product issue is created. Codes from the service request record are copied to this field when a product issue is created from a service request.
Product Issues	Corrective Actions	Codes	Typically, codes of type Corrective Action are entered in this field, although any type of code can be entered.
Product Issues	Investigation	Method Codes	Only codes of type Method can be entered.

Screen	View	Field Name	Notes
Product Issues	Investigation	Result Codes	Only codes of type Result can be entered.
Product Issues	Investigation	Conclusion Codes	Only codes of type Conclusion can be entered.
Product Issues	Investigation	Non-Evaluation Codes	Only codes of type Non-Evaluation can be entered.
Product Issues	Importer MDV	Patient Codes	Only codes of type Patient can be entered.
Product Issues		Device Codes	Only codes of type Device can be entered.
Repairs	More Info	Codes	Typically, codes of type Product Analysis are entered in this field, although any type of code can be entered.
Corrective Actions	More Info	Codes	Typically, codes of type Corrective Action are entered in this field, although any type of code can be entered.
Regulatory Reports	More Info	Method Codes	Only codes of type Method can be entered. Copied from the product issue when a regulatory report is populated.
Regulatory Reports	More Info	Result Codes	Only codes of type Result can be entered. Copied from the product issue when a regulatory report is populated.
Regulatory Reports	More Info	Conclusion Codes	Only codes of type Conclusion can be entered. Copied from the product issue when a regulatory report is populated.
Regulatory Reports	More Info	Non-Evaluation Codes	Only codes of type Non-Evaluation can be entered. Copied from the product issue when a regulatory report is populated.
Regulatory Reports	Importer MDV	Patient Codes	Only codes of type Patient can be entered. Copied from the product issue when a regulatory report is populated.
Regulatory Reports	Importer MDV	Device Codes	Only codes of type Device can be entered. Copied from the product issue when a regulatory report is populated.
Activities	Items	Code	Single value field.

An Example

When you set up codes, you can enter values for Product, Product Line, Category, Type, Area, and Sub Area that are associated with the code. Call center agents can use these values to search for and identify the correct code for a service request.

The following table shows an example of the field values used to describe one code.

Field	Example Value
Name	Error 333
Description	Blood analyzer pump overflow.
Code Type	Device
Product	Blood Analyzer Model 350, Blood Analyzer Model 373. This field can have multiple values.
Product Line	Blood analyzer, Dialysis system This field can have multiple values.
Category	Nephrology
Type	Potential Complaint
Area	Software
Sub Area	Pump timing

How to Set Up Codes

Create the codes needed to classify your company's adverse events and complaints.

Codes are needed for the procedures in this chapter and for procedures in the following AECM chapters.

To set up codes

1. Navigate to Administration - Service screen, then the Code Administration view.
2. In the Code Admin list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	Enter the name for the code. Typically this is a number or a letter number combination.

Field	Comments
Code Type	Examples are: Method, Result, Conclusion, Device, Patient.
Product	Multiple products can be associated with a code.
Product Line	Multiple product lines can be associated with a code.
Category	A grouping of products. Only one category can be associated to a code. To set up categories, see *Siebel Order Management Guide* .
Type	Use to categorize the type of service request, for example, as a potential complaint. This is the same LOV used in service request and product issue records.
Area	The Type field constrains this drop-down list.
Sub Area	The Area field constrains this drop-down list.

Setting Up Lot Numbers for Medical Products

Create lot numbers for all batches of products that are tracked by lot number.

Lot numbers for Siebel Medical and Siebel Pharma are the same except for the following:

- For Siebel Medical, lot numbers are set up in the Administration - Service screen, then Lot Administration view.
- For Siebel Pharma, lot numbers are set up in the Administration - Samples screen, then the Lot Setup view.

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

To set up lot numbers

1. Navigate to Administration - Service screen, then the Lot Administration view.
2. In the Lot Admin list, create 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.

Field	Comments
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.
Product	The name of the product with which this lot number is affiliated. For more information, see *Defining Internal Products* paying specific attention to *Product Categorization Settings* and *About Samples and Promotional Items Settings*.
Product Level	Applies only to drug samples.

Capturing Adverse Events and Complaints as Service Requests

The creation of the service request by the call center agent is often the first step in AECM.

The following procedure assumes that you are familiar with the service request screen and associated functionality. (For information about the service request screen, see *Siebel Field Service Guide* .)

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

To create a service request

1. Navigate to the Service Request screen, then the Service Request List view.
2. In the Service Request list, create a new record and complete the necessary fields, such as account, contact, product, summary, and description.

   Some fields are described in the following table.

Field	Comments
Codes	Codes to describe or categorize the service request.
Lot #	Select an existing lot number or enter a new lot number. You can enter a *new* lot number in one of two ways: o Formally enter a new lot number using the New button on the Lot Setup dialog box. o Use the Lot # field as a simple text field. If you enter a Lot # this way, the value is only stored in this product issue record and is not checked against a table of valid lot numbers. This does not create a new lot # record in the Lot Administration view.
Product Issue	This is automatically flagged if the service request is escalated to a product issue.

Field	Comments
Type	Use this field to categorize the type of service request, for example, as a potential complaint.
Area	The Type field constrains this drop-down list.
Sub Area	The Area field constrains this drop-down list.

3. Search for a solution to the service request:
   a. Drill down on a record.
   b. Click the Solutions tab.
   c. In the Solutions list, create a new record and complete the necessary fields.

      In the Add Solutions dialog box that appears, query for a solution and add it.
   d. In the Solutions list, drill down on the Name field to see details about the solution.

      For more information about solutions, see *Siebel Field Service Guide* .
4. Set up activities for the service request using an activity plan.

   For example, appointments for the field service engineer can be set up from the Activities view. For more information about field service activities, see *Siebel Field Service Guide* .
5. Dispatch a field engineer.

   For more information about dispatch and scheduling, see *Siebel Field Service Guide* .
6. If products or materials need to be returned for analysis, set up an RMA order.

   For more information about shipping and receiving, see *Siebel Field Service Guide* .

Escalating Adverse Events and Complaints as Product Issues

A valid adverse event or complaint that is first recorded as a service request should be transferred to a product issue record. As a product issue, it can be investigated by the quality manager. This allows the Call Center to retain ownership of the service request and the Quality team to manage the investigation and processing of the complaint.

> **Note:** Only one product issue can be created from a given service request using the Create Product Issue button. Additional product issues for a service request can be created using the Create Related PI button in the Product Issues screen.

This procedure describes creating a product issue from the Service Requests screen. Product issue records can also be created in the Product Issues screen and the Site Management screen.

> **Tip:** To aid call center agents with information gathering and problem diagnosis associated with adverse events and complaints, you can set up SmartScripts. For more information about SmartScripts, see *Siebel SmartScript Administration Guide* .

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

To create a product issue from a service request

1. Navigate to the Service Requests screen, then the Service Request List view.
2. In the Service Request list, select the record for which you want to create a product issue.
3. Click Create Product Issue.

   This starts the Create a Product Issue from a Service Request workflow that:

   - Makes these fields in the Service Request read-only: Account, Last Name, First Name, and Product.
   - Creates a product issue record from a Service Request.
   - Copies the following fields from the service request to the new product issue: Account, Summary, Last Name, First Name, Description, Type, Area, Sub Area, Priority, Severity, Product, Codes, Asset #, and Lot#.
   - Takes you to the Product Issues screen.

   For more information about the workflow, see *About Configuring Adverse Events and Complaints Capture*.
4. Complete the necessary fields in the product issue record.

   Typically, call center agents enter data such as the event date, the outcome, and whether the product was returned. If more than one product is involved with the adverse event or complaint, it is entered in the product issue record. (Only one product can be associated with a service request record.)

Adding Complaint-Specific Information to Product Issues

The call center agent enters complaint-specific information to the product issue record, for example, patient details. Information about only one patient can be associated with a product issue.

This task is a step in *Process of Capturing and Escalating Adverse Events and Complaints*.

To add information about the patient to the Product Issue record

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.

   > **Note:** If you created the product issue using the Create Product Issue button in the Service Requests screen, the workflow takes you to this view.

3. Click the Patient tab.
4. Complete the fields in the Patient form.

   Some fields are described in the following table.

Field	Comments	Mapping to 3500A Form
Patient Identifier	Patient unique ID.	A1

Field	Comments	Mapping to 3500A Form
Gender	Patient gender (male or female).	A3
Age	Patient age.	A2
Date of Birth	Patient date of birth.	A2
Weight	Patient weight.	A4
U/M	Unit of measurement for weight	A4

About Configuring Adverse Events and Complaints Capture

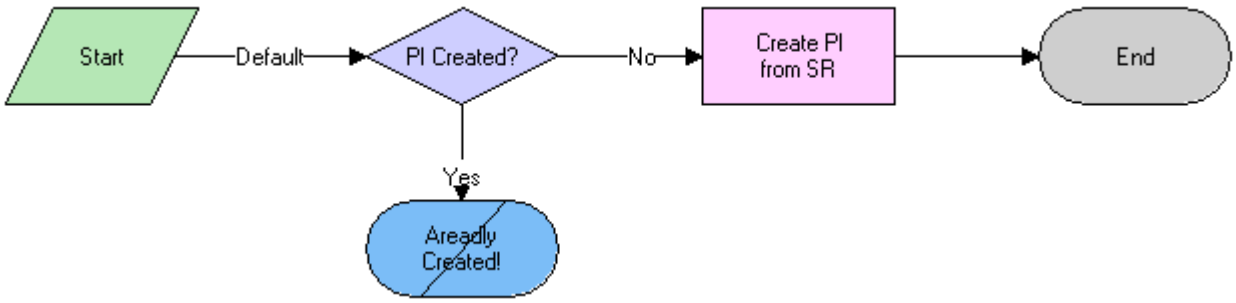
There are two aspects of the Create Product Issue button that you can configure:

- The Create a Product Issue from a Service Request Workflow
- The fields that are copied from the Service Request to the Product Issue record

Create a Product Issue from a Service Request Workflow

This workflow (LS Medical Create PI from SR) is initiated from the Create Product Issue button on the Service Requests screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Checks if a product issue has already been created from this service request. If it has, the workflow ends. (Only one product issue can be created from a service request using the Create Product Issue button.)

2. Creates a new product issue.
3. Copies data from the service request to the product issue.
4. Goes to the Product Issue screen, then the More Info view.

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Changing Which Fields Are Copied to the Product Issue

When the Create Product Issue button is used to create a product issue record from a service request record, data from various fields are copied from the service request record to the new product issue record.

To change which fields are copied when a product issue is created

- Use the Data Transfer Utilities to edit the LS Medical Create PI from SR data map object.

For information about the Data Transfer Utilities, see *Siebel Finance Guide* .

20 Investigating Adverse Events and Complaints

Investigating Adverse Events and Complaints

This chapter covers the following topics:

- *About Investigating Adverse Events and Complaints*
- *Scenario for Complaint Investigation*
- *Process of Adverse Events and Complaints Investigation*
- *About Configuring Create Related PI and Review Complete Buttons*
- *About the LS Medical Product Issue Service Business Service*

About Investigating Adverse Events and Complaints

This chapter describes review and investigation of a product complaint or adverse event using the Siebel Adverse Events and Complaints Management (Siebel AECM) module. This typically involves entering more information about the product issue, determining if the issue should be reported, and creating an activity plan for researching and addressing the issue.

Related Topics

Capturing Adverse Events and Complaints

Recording Product Analysis for Adverse Events and Complaints Management

Managing Corrective and Preventative Actions

Regulatory Reporting

Communicating with Customers for Adverse Events and Complaints Management

Closing Adverse Events and Complaints

Scenario for Complaint Investigation

This scenario is an example process performed by the Siebel administrator and the quality manager. Your company might follow a different process according to its business requirements.

This process is designed to illustrate the functionality of the Siebel AECM.

The Siebel Administrator

The administrator sets up the assessment and activity templates that the quality manager uses in the course of investigating product issues.

Before creating templates, the administrator consults with the quality manager who thoroughly understands the company's business processes. The quality manager suggests the text for the templates that administrator sets up and reviews the templates before roll out.

The Quality Manager

The quality manager reviews the complaints assigned to her. Her job is to determine if an investigation of the complaint is required and if the complaint needs to be reported to a regulatory agency.

The quality manager notices that a new product issue has been added to her queue. This complaint was initially reported as a service request and was escalated by a call center agent. It concerns a failure in a blood analyzer.

Upon taking ownership, the quality manager reviews the service request associated with the product issue, including the work done by the service engineer.

Next, the quality manager contacts the customer and obtains more details about the issue. She discovers that there are two product issues associated with this incident: the cartridge might have been faulty as reported in the service request, but also the third-party reagents used might have exacerbated the problem. The quality manager creates a second product issue to investigate the reagents.

To help guide the investigation and keep it on schedule, the quality manager applies an activity template that generates an activity plan — a list of activities that need to be carried out, some by her and some by other employees.

Her next step is to determine if the product issues are reportable. She answers the series of questions in the Assessments view and looks at the score. Scores of 75% and higher indicate that the product issues should be reported.

After completing the review, the quality manager changes the status of the product issue records to Review Complete. This locks down some data in the complaint file and makes other data read-only.

Process of Adverse Events and Complaints Investigation

This example process represents the tasks that are carried out in the *Scenario for Complaint Investigation*.

Administrator Procedures

- *Creating Product Issue Assessment Templates*
- *Creating Product Issue Activity Templates*

End-User Procedures

- *Reviewing and Editing the Product Issues*
- *Creating Multiple Product Issues Related to One Service Request*
- *Creating Product Issue Activity Plans*
- *Assessing If a Product Issue Is Reportable*
- *Completing Adverse Events and Complaints Reviews*

Creating Product Issue Assessment Templates

The purpose of the assessment is to quantify an evaluation of the product issue. The assessment template is made up of a series of questions about the product issue with an associated list of possible answers. Each question and each answer is assigned a weighting from which a single score is calculated.

This value can be used to indicate the risk associated with the issue or whether the issue should be reported to the regulatory agency.

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To create an assessment template

- Refer to *Siebel Applications Administration Guide* for information about how to create assessment templates. Make sure to set the template type to Product Issue.

Creating Product Issue Activity Templates

Product issue activity templates are used to create a standard set of activities that the quality manager and other employees do to investigate product issues.

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To create a product issue activity template

1. Navigate to the Administration - Data screen, then the Activity Templates view.
2. In the Activity Templates list, create a new record and complete the necessary fields.
    a. Set the Type field to Product Issue.
    b. Leave these fields blank: Sales Stage, Sales Method, Protocol Title; they do not apply to product issue activities.
3. Associate individual activities with the template, as described in *Siebel Applications Administration Guide* .

> **Note:** Lead times for product issue 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.

Reviewing and Editing the Product Issues

Early in the investigation, the quality manager reviews, updates, and adds information to the product issue record. This record becomes the adverse event or complaint file for the investigation.

There are many fields in the product issue record. Some are filled in by the call center agent, some automatically, and others by the quality manager. Of particular importance are those fields that are used to populate the regulatory reports. For more information, see *Regulatory Reporting*

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To review and edit a product issue

1. Navigate to the Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, select a record.
3. In the Product Issues applet, modify the fields in the record as required.

   Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
Account	The name of the account associated with the product issue.	E1
Address	Account address - street address.	E1
Alert Age	The number of days since the product issue was identified as reportable. If an initial report has been filed, the alert age is the number of days that the product issue was marked reportable before the report was filed.	
Alert Date	The date when a representative of a company becomes aware that the event needs to be reported. For example, when: o A call center agent captures the adverse event or complaint. o An assessment indicates that the event is reportable.	
Area	The general categorization area for the product issue. This field is constrained by Type.	

Field	Comments	Mapping to 3500A Form
City	Account address - city.	E1
Contacts (Contact Last Name in list)	The last name of the customer contact associated with the product issue. These contacts can also be entered using the Contacts view of the Product Issues screen, then the Contacts view.	E1
CSN	Customer service number. A unique number to identify the account.	E1
Evaluation	This field appears in the list applet. It also appears in the form in the Investigation view.	
First Name	The first name of the investigator carrying out a particular clinical trial at a site.	
First Name (Contact First Name in list)	The first name of the customer contact associated with the product issue.	E1
Investigator	The last name of the investigator carrying out a particular clinical trial at a site. If the product issue is associated with a clinical trial, this field is auto-populated with the last name of the investigator at the protocol site, specified in the Protocol number field.	
Mfg Report #	This field appears in the list applet. It also appears in the form in the Importer view.	
Occupation	Occupation of the contact. This is copied from the value of the Type field in the Contacts screen.	E3
Open Age	The number of days since the product issue was opened, or, if the product issue is closed, this is the number of days that the product issue was open.	

Field	Comments	Mapping to 3500A Form
Phone #	Contact's work phone number.	E1
PI #	Unique number to identify the product issue. It is auto-generated when the product issue is created.	
Postal Code	Account address - postal code.	E1
Protocol #	Protocol number identifies the clinical trial at a site. If regulatory report is an IND safety report, enter the protocol number.	G6
Provider	Indicates if the contact is a health professional.	E2
Received (Received Date in list)	The date when a company representative became aware of the event.	
Reported FDA	Indicates if initial reporter sent a report to the FDA.	E4
SR #	The service request from which the product issue was created.	
State	Account address - state.	E1
Status	The current status of the product issue. The status of the product issue can be changed by the owner of the product issue, using the Review Complete, Close, and Reopen buttons. Changes to this field are tracked in the Approvals view.	
Sub Area	This further refines the area categorization. (The Area field constrains this drop-down list.)	
Sub Status	The Status field constrains this drop-down list.	

4. In the Event Detail applet, modify the fields as required.

   Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
Event Type	Describes the type of event.	B1
Event Date	The approximate date of the adverse event.	B3
Description (Event Description in the list)	Detailed description of the event	B5
# Occurrences	Number of times the event occurred before it was reported	
External Products	List of other medical products (for example, drugs, medical devices) used by patient at the time of the event and dates of use	C10 or D11
Tests/Data	All appropriate relevant test and laboratory findings and dates	B6
Life Threatening	Life Threatening	B2
Disability	Disability	B2
Hospitalization	Hospitalization	B2
Congenital Anomaly	Congenital Anomaly	B2
Relevant History	Relevant history, including preexisting medical conditions	B7
Death	Death	B2
Required Intervention	Required Intervention	B2
Date of Death	Date of Death	B2

Field	Comments	Mapping to 3500A Form
Other	Describe the reported outcome if it was not covered in the previous selections	B2

5. In the Products applet, create new records and complete the necessary fields as required.

   Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
Product	The name of the product associated with the event	C1
Lot #	Lot number of the product	C6, D4
Asset #	Asset number for the product	D4
Serial #	Serial number for the asset	D4
Mfg Name	Full name of the manufacturer of the product	D3
Mfg Date	The date the product was manufactured	H4
Expiration Date	Expiration date of the lot or product	C7, D4
Labeled Single Use	Indicates if the device is labeled for single use	H5
Device Operator	Type of person operating or using the suspect medical product on the patient at the time of the event	D5
Device Available	Indicates if the device is available for evaluation by the manufacturer	D10
Return Date	Date that the device was shipped to the manufacturer	D10
Device Type	Generic or common name of the suspect medical device	D2

Field	Comments	Mapping to 3500A Form
Reprocessed	Indicate if this is a single-use device that was reprocessed and reused on a patient	D8
Reprocessor	Name and address of the reprocessor of the reused single-use device	D9
NDC#	National drug code #	C9
Part #	Part number	D4
Implant Date	The implant date or best estimate for medical devices that are implanted in the patient	D6
Explant Date	The date or best estimate for medical devices removed from a patient	D7
Street Address	Manufacturer's street address	D3
City	Manufacturer's address: City	D3
Postal Code	Manufacturer's address: Postal Code	D3
State	Manufacturer's address: State	D3
Model #	Model number	D4
Catalog #	Catalog number	D4
Dose Per Unit	Dosage for each unit of drug	C2
Frequency	Frequency of drug administration	C2
Route Used	Route used to administer the drug	C2
Indication	The indication for which the product was prescribed or used in this particular patient	C4

Field	Comments	Mapping to 3500A Form
Therapy From Date	The date drug administration was started (or best estimate)	C3
Therapy To Date	The date drug administration was stopped (or best estimate)	C3
Event Abated	Event abated after use stopped or dose reduced	C5
Reintroduce Reoccur	Event reappeared after reintroduction	C8

6. Review any service requests associated with the product issue as follows:
   a. Drill down on the product issue record.
   b. Click the Service Request tab.
   c. Drill down on the SR #.

Creating Multiple Product Issues Related to One Service Request

Only one product issue can be created directly from a service request (using the Create Product Issue button on the Service Requests screen). However, in the Product Issues screen, the quality manager can create additional product issues related to the service request and the original product issue.

Here are some examples where multiple product issue records are needed:

- A medical kit contains a drug and a device. The drug and the device might have caused the event. Separate adverse event and product complaint investigations have to be completed.
- There are several products involved with the adverse event or complaint and the quality manager wants a unique product issue for each product.

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To create a new product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.
3. Click Create Related PI.

   This starts a workflow (LS Medical Product Issue Create Related PI), which creates a new product issue record, copying fields from the current product issue.

   For more information about the workflow, see *About Configuring Create Related PI and Review Complete Buttons*.
4. In the Event Detail applet, modify the fields as required.
5. In the Products applet, create a new record for each product that you want to associate with the issue and complete the necessary fields.

Creating Product Issue Activity Plans

A product issue activity plan is a list of activities associated with the product issue. The quality manager applies an activity template, suited to the type of product issue being investigated. The activity template sets up predefined activities that the quality manager and others follow to complete the product issue investigation.

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To create activities for product issue investigation using a template

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.
3. Click the Activity Plans tab.
4. In the Activity Plans list, create a new record and complete the necessary fields.

   Some fields 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.
Template	Only templates whose type is Product Issue can be selected in this field.

5. In the Activities applet, modify the existing activities or create new activity records as required.

Assessing If a Product Issue Is Reportable

Assessments allow end users to calculate a single numerical value based on their answers to questions about the product issue. An quality manager can then use the assessment score to decide how to proceed with the investigation.

These are some example assessment questions used to determine if a product needs to be reported:

- Was there any patient injury? {No, Mild, Moderate, Severe}
- Was there a labeling problem? {No, Yes}
- Did the product function according to specification? {No, Yes}

Tip: An alternate way to assess product issues is by using a SmartScript which guides the quality manager through a series of questions using a decision tree. For more information about SmartScripts, see *Siebel SmartScript Administration Guide* .

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To assess a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.
3. Click the Assessments tab.
4. In the Assessments list, create a new record and complete the necessary fields.

   For example, in the Template Name field, select the assessment template that has been prepared for you. The application fills in other fields in the record when the record is saved.
5. In the Assessment Attributes applet, enter a value for each attribute.

   The assessment score and percentage are calculated and shown in the Assessments list.

Completing Adverse Events and Complaints Reviews

The exact meaning of the adverse event or complaint review status depends upon your business process. For example, it could indicate that there is sufficient data to begin a second phase of the investigation (trend analysis and recreation of the problem in the lab).

As part of the review process, the quality manager changes the status the record to Review Complete. An important effect of changing the status of a product issue to Review Complete is that a number of key fields are locked down and others are made read-only.

This task is a step in *Process of Adverse Events and Complaints Investigation*.

To complete a review of a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.
3. Click Review Complete.

   This starts a workflow (LS Medical Product Issue Review Complete) that:

   - Changes the status of the product issue to Review Complete
   - Authenticates the user
   - Locks down these fields: Primary Contact first and last names, Contact work phone #, Reported By, Account Name, Account Address, Product, Device Type, and Part #.
   - Makes these fields read-only: Account, Account Address, Date of Event, Summary, All patient information (on Patient view), and Description.

For more information about the workflow, see *About Configuring Create Related PI and Review Complete Buttons*. For more information about field lockdown, see *Closing Adverse Events and Complaints*.

About Configuring Create Related PI and Review Complete Buttons

There are two buttons associated with adverse events and complaints investigation. You can configure the workflows and fields copied for these buttons.

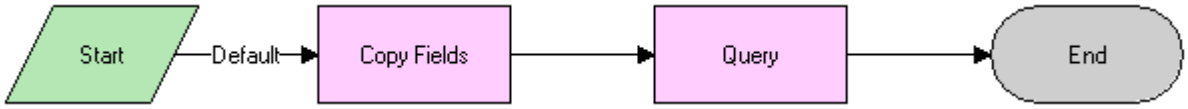
- *LS Medical Product Issue Create Related PI Workflow*
- *Changing Which Fields Are Copied to the New Product Issue*
- *LS Medical Product Issue Review Complete Workflow*
- *LS Medical User Verification Workflow*

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

LS Medical Product Issue Create Related PI Workflow

This workflow is initiated from the Create Related PI button on the Product Issues screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Creates a new product issue.
2. Copies data from the original product issue to the new product issue.
3. Makes the new product issue the active record.

Changing Which Fields Are Copied to the New Product Issue

When the Create Related PI button is used to create a product issue, data from various fields are copied from the original product issue record to the new product issue record.

To change which fields are copied when a product issue is created

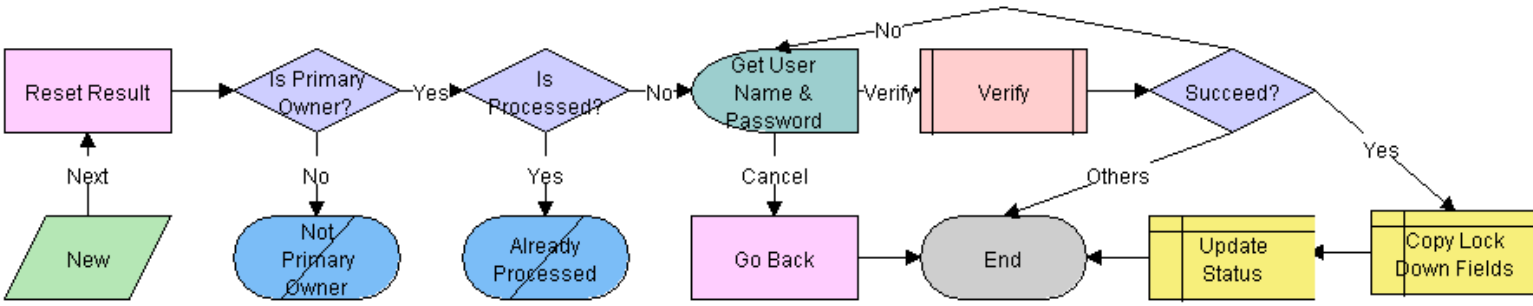
- Use the Data Transfer Utilities to edit the LS Medical PI Create Related PI data map object.

For information about the Data Transfer Utilities, see *Siebel Finance Guide* .

LS Medical Product Issue Review Complete Workflow

This workflow is initiated from the Review Complete button on the Product Issues screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

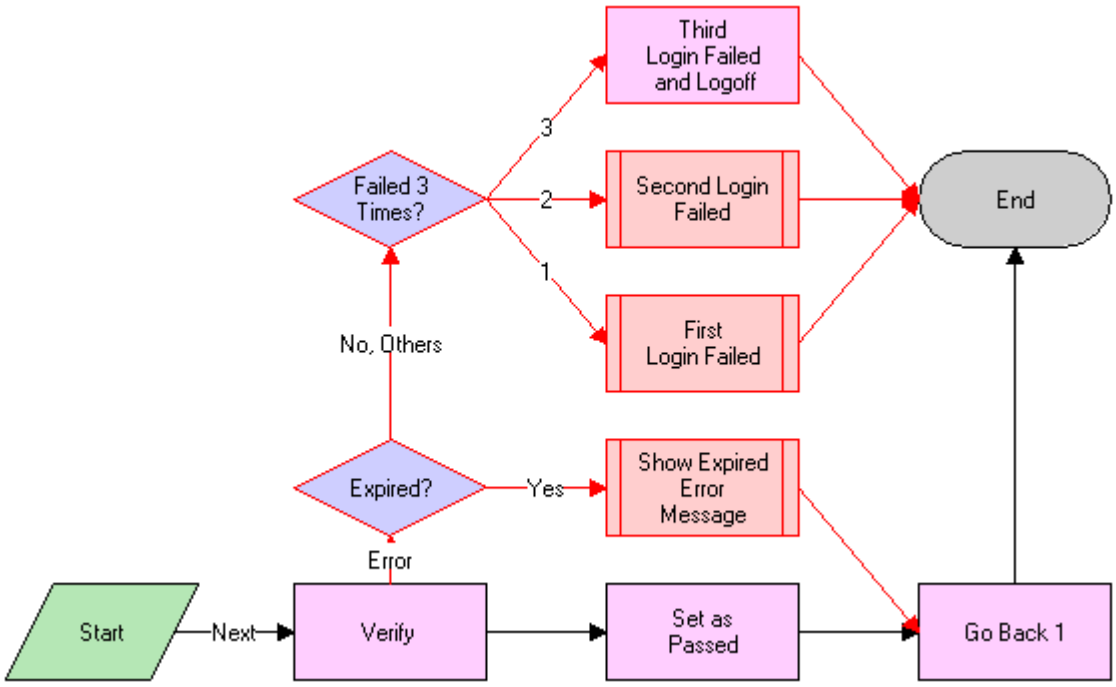
1. Checks if the user is the primary owner of the product issue. If not, the workflow ends.
2. Checks if the product issue has already been processed. If it has, the workflow ends.
3. Calls the LS Medical User Verification workflow.
4. If the user authentication is successful, copies the lockdown fields, makes some fields read-only, and changes the status to Review Complete.

LS Medical User Verification Workflow

This workflow authenticates the user's name and password. This workflow is called from other workflows.

Tip: You can configure the User Verification workflow to capture the user name and password of two users.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Calls the Authentication business service to verify the user name and password. The Authentication business service calls two methods to perform this action as follows:
    - **ValidateSessionUser.** This method validates that the logged-in user is the current session user.
    - **Authenticate.** This method checks that the supplied username and password are valid in the system.
2. If the authentication passes, returns to the original view and sets the result code to 100—passed.
3. If the user name and password are expired, shows an error dialog box and sets the result code to 200—expired.
4. If the authentication fails, increases the result code by 1 and on the third failure logs the user out of the application.

About the LS Medical Product Issue Service Business Service

The LS Medical Product Issue Service is based on the class CSSServiceLSProductIssue. It is a placeholder for the business services used by Siebel AECM.

Customizing the LS Medical Product Issue Service

The LS Medical Product Issue Service business service is written in C++ and cannot be modified. However, the methods in this business service are modular and can be used in workflows that you create.

The LS Medical Product Issue Service Business Service Methods

The LS Medical Product Issue Service has three methods. These methods are described in the following table.

Method	Description	Used in Workflow
GenerateReportNum	Generates report numbers for MedWatch and MDV reports as follows. • If the report is an initial report, then the method generates a new report number. • If the report is a supplemental report, then the method takes the report number from the initial report.	LS Medical Product Issue RR Submit
Logoff	Logs out the user.	LS Medical User Verification
Query	Queries with the input search spec and sort spec.	LS Medical Create Related Product Issue

21 Recording Product Analysis for Adverse Events and Complaints Management

Recording Product Analysis for Adverse Events and Complaints Management

This chapter covers the following topics:

- *About Recording Product Analysis for Adverse Events and Complaints Management*
- *Scenario for Product Analysis Arising from a Complaint*
- *Process of Product Analysis Following a Product Issue*
- *About Configuring Product Analysis Approvals*

About Recording Product Analysis for Adverse Events and Complaints Management

This chapter describes how to use the Siebel Business Application during the product analysis phase of an adverse events and complaints investigation.

When a faulty product is returned to the manufacturer for study, a product analysis record is opened. This record documents details of the analysis. When the analysis is complete, root cause and corrective action information are added and the record is submitted for approval.

Related Topics

Investigating Adverse Events and Complaints Capturing Adverse Events and Complaints

Investigating Adverse Events and Complaints

Managing Corrective and Preventative Actions

Regulatory Reporting

Communicating with Customers for Adverse Events and Complaints Management

Closing Adverse Events and Complaints

Scenario for Product Analysis Arising from a Complaint

This scenario is an example process performed by the Siebel administrator, the manager of the product analysis team, a team member, and the quality manager. Your company might follow a different process according to its business requirements.

This process is designed to illustrate the functionality of the Siebel AECM.

Introduction

A customer had a problem with a new blood analyzer system. The analyzer's cartridge was determined to be faulty, and the customer returned it to the manufacturer for analysis. The quality manager has already opened a product complaint file (product issue record) for this problem.

The Siebel Administrator

The administrator sets up the activity templates that the product analysis team uses in the course of analyzing product issues. Before creating these templates, the administrator consults with the quality manager and reviews the company's S.O.P (standard operating procedure) for product analysis.

The administrator checks that all the necessary codes for product analysis have been set up as appropriate for the company's business process and products.

Quality Manager

The initial review of the product complaint has been completed and the faulty cartridge has been sent by the customer. The quality manager creates a product analysis record in the complaint file. She assigns a member of the product analysis team to be the primary owner of the product analysis record.

Member of the Product Analysis Team

The decontamination unit initially receives and processes the faulty cartridge. After decontamination, the cartridge is sent to a member of the product analysis team. He records receipt of the faulty cartridge, reviews the product analysis record associated with this complaint, and begins analysis of cartridge.

During the course of the analysis, the team member creates activities to keep track of the analysis steps. He records the results of the analysis. At the conclusion of the analysis, he records the root cause of the problem and proposes corrective action.

When analysis of the cartridge is complete, the team member submits the product analysis information for approval.

Quality Manager and Product Analysis Manager

Both the manager of the product analysis team and the owner of the product complaint file are required to approve the product analysis. When they review their Inboxes, they learn that the product analysis is complete and ready for approval. Individually, they review and approve the product analysis.

Process of Product Analysis Following a Product Issue

This example process represents the tasks that are carried out in the *Scenario for Product Analysis Arising from a Complaint*.

Administrator Procedures

- *Creating Product Analysis Activity Templates*
- *Setting Up Codes for Product Analysis*

End-User Procedures

- *Creating Product Analysis Records from a Product Issue*
- *Filling in Product Analysis Records*
- *Completing Product Analysis and Creating Corrective and Preventive Actions*
- *Submitting Product Analysis Records*
- *Approving or Rejecting Product Analysis Records*

Creating Product Analysis Activity Templates

Product analysis activity templates are used to create standard sets of activities that the product analysis team use to guide them as they carry out decontamination procedures, validation tests, and so on.

This task is a step in *Process of Product Analysis Following a Product Issue*.

To create a product analysis activity template

1. Navigate to the Administration - Data screen, then the Activity Templates view.
2. In the Activity Templates list, create a new record and complete the necessary fields.
    a. Set the Type field to Repair.
    b. Leave these fields blank: Sales Stage, Sales Method, and Protocol Title; they do not apply to product analysis activities.
3. Associate individual activities with the template, as described in *Siebel Applications Administration Guide* .

Setting Up Codes for Product Analysis

The administrator defines the codes that are used to categorize product analysis.

This task is a step in *Process of Product Analysis Following a Product Issue*.

To set up codes for Product Analysis

- See *Setting Up Codes*.

Note: Typically, you create codes of type Product Analysis for use with Product Analysis records. However, all types of codes can be associated with Product Analysis records.

Creating Product Analysis Records from a Product Issue

The first task in analyzing a defective product is to create a product analysis record. The product analysis record captures information from the associated product issue and serves as a repository for all information associated with the product analysis.

Typically, the product analysis record is created by the quality manager who has access to the Product Issues screen. The quality manager can then assign the product analysis to a member of the analysis team who has access to the Repairs screen but not necessarily to the Product Issues screen.

The product analysis record is a repair record of type Product Issue Analysis. For information about the Repairs screen, see *Siebel Field Service Guide* .

This task is a step in *Process of Product Analysis Following a Product Issue*.

To create and assign the product analysis record

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issues list, drill down on a product issue.
3. Click the Product Analysis tab.
4. In the Repairs list, create a new product analysis record and complete the necessary fields.

   Account, Product, Asset number, Lot number, and Service Request number are copied from the product issue to the new product analysis record.
5. In the Repairs list, drill down on the product analysis record (using the Repair # field link).
6. Complete the Owners field.

   If Assignment Manager is set up, then you can assign an owner by clicking the cogwheel icon, and selecting Assign.

Filling in Product Analysis Records

The product analysis team member records information such as the results of decontamination and validation tests.

This task is a step in *Process of Product Analysis Following a Product Issue*.

To complete a product analysis

1. Navigate to Repairs screen, then the Repair List view.
2. In the Repair list, select a product analysis record and complete the fields.

   Some fields are described in the following table. Other fields are described in *Siebel Field Service Guide* .

Field	Comments
Codes	Codes to describe or categorize the product analysis. Typically, select codes of type Product Analysis.
Product	The primary product associated with the product issue.
Received	Defaults to the date and time that the record was created.
Repair #	A unique identifying number for the repair. Automatically populated.
Type	Defaults to Product Issue Analysis.

3. Drill down on the Repair # field to open the record.
4. Select the Activity Plans tab and create activity records as required.
5. Select the Attachments tab and attach documents as required.
6. Select the Notes tab and add notes as required.

Completing Product Analysis and Creating Corrective and Preventive Actions

At the conclusion of the product analysis, the product team member adds information about the root cause of the problem and initiates corrective and preventive actions (CAPA).

This task is a step in *Process of Product Analysis Following a Product Issue*.

To add root cause and corrective actions to a product analysis record

1. Navigate to Repairs screen, then the Repair List view.
2. In the Repair list, drill down on a product analysis record and complete the Root Cause field.

3. Add corrective actions to the record as follows:
    a. Click the Corrective Actions tab.
    b. In the Corrective Actions list, add an existing or create a new corrective action as required.
        - If the corrective action already exists, then add an existing corrective action and select a corrective action from the Add Corrective Actions window.
        - If the corrective action is new, then create a new corrective action and complete the fields in the new CAPA record.

For more information about CAPAs, see *Managing Corrective and Preventative Actions*

Submitting Product Analysis Records

Once the root cause has been recorded and corrective actions initiated, the product analysis is ready to be submitted for approval.

Here are some restrictions on submitting a product analysis record:

- Only the primary owner of the product analysis record can submit it.
- The owner of the product analysis must have a manager.
- The product analysis must have a product issue associated with it.
- The associated product analysis must have an owner.

> **Note:** These restrictions can be modified to meet your business needs. For information about configuring the submit workflow see *About Configuring Product Analysis Approvals*.

This task is a step in *Process of Product Analysis Following a Product Issue*.

To submit a product analysis

1. Navigate to Repairs screen, then the Repair List view.
2. In the Repair list, select a product analysis.
3. Click Submit.

   This starts a workflow (LS Medical PA Submit) that sends requests for approval to the Inboxes of the designated approvers. For more information about the workflow, see *About Configuring Product Analysis Approvals*.

   > **Note:** If you submit a product analysis record in error, click the Withdraw button to unsubmit it. This starts the LS Medical PA Withdraw workflow. For more information about the workflow, see *About Configuring Product Analysis Approvals*.

4. Verify that the product analysis was submitted to the correct approvers:
    a. Drill down on the product analysis record.
    b. Click the Approval History tab.

       The list should contain three records for:

        - The primary owner (This should already be approved)
        - The primary owner's manager

- The product issue's primary owner

Approving or Rejecting Product Analysis Records

Depending on your business process, an approved product analysis might be required before corrective actions can be taken.

In the preconfigured application, the required approvers for product analysis records are:

- The manager of the product analysis primary owner
- The primary owner of the product issue record that generated product analysis

This task is a step in *Process of Product Analysis Following a Product Issue*.

Approving Product Analysis Records

The following procedure shows you how to approve a product analysis record.

To approve a product analysis record

1. Navigate to Inbox screen, then the Inbox Items List view.
2. In the Inbox Items List, review and approve the item.

   The status of the product analysis becomes Closed and the sub status becomes Approved.

Rejecting Product Analysis Records

The following procedure shows you how to reject a product analysis record.

To reject a product analysis record

1. Navigate to Inbox screen, then the Inbox Items List view.
2. In the Inbox Items List, review and reject the item.

   The status of the product analysis changes to Rejected. In such cases, the product analysis team member must submit the record again.

   If Manager 1 rejects the item before Manager 2 takes action on it, Manager 2 never sees the item (it is deleted from Manager 2's Inbox when it is rejected by Manager 1).

   For more information about the Inbox, see *Siebel Applications Administration Guide* .

About Configuring Product Analysis Approvals

There are two buttons associated with adverse events and complaints investigation. You can configure the workflows for these buttons.

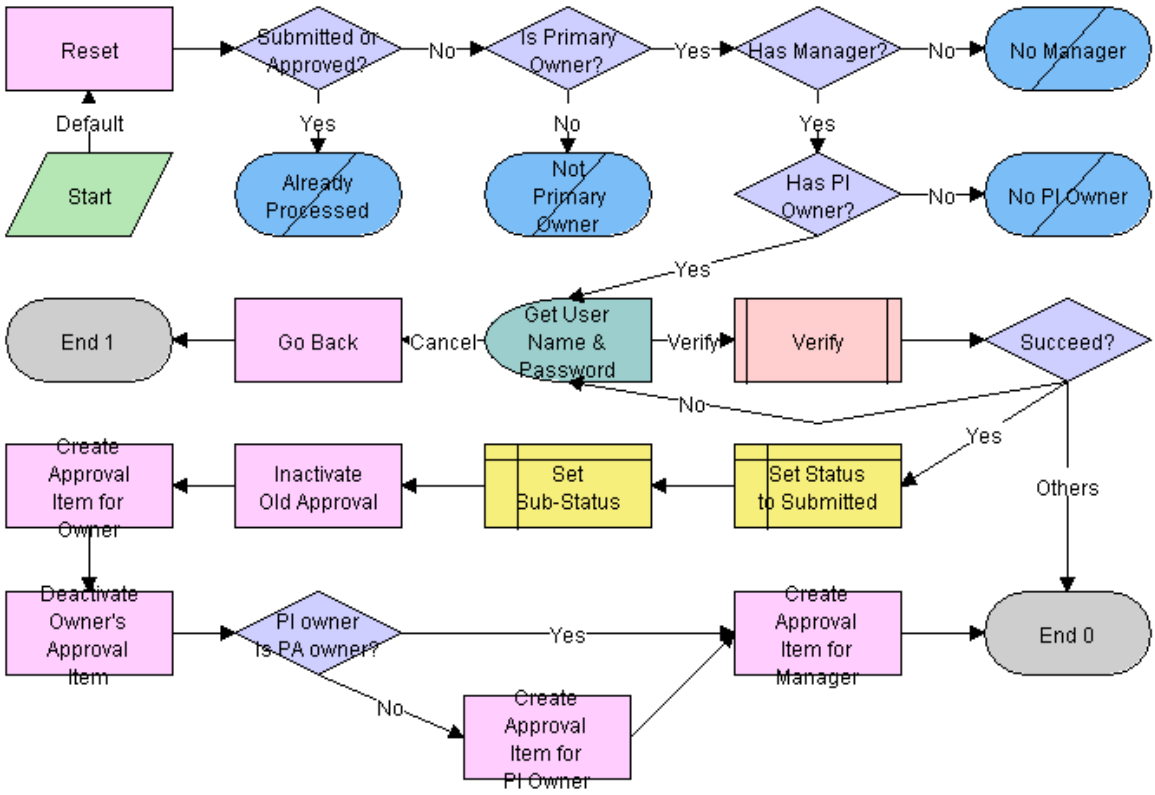
- Submit button (*LS Medical PA Submit Workflow*)
- Withdraw button (*LS Medical PA Withdraw Workflow*)

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

LS Medical PA Submit Workflow

This workflow is initiated from the Submit button on the Repairs screen.

The workflow appears in the following figure.



Workflow Description

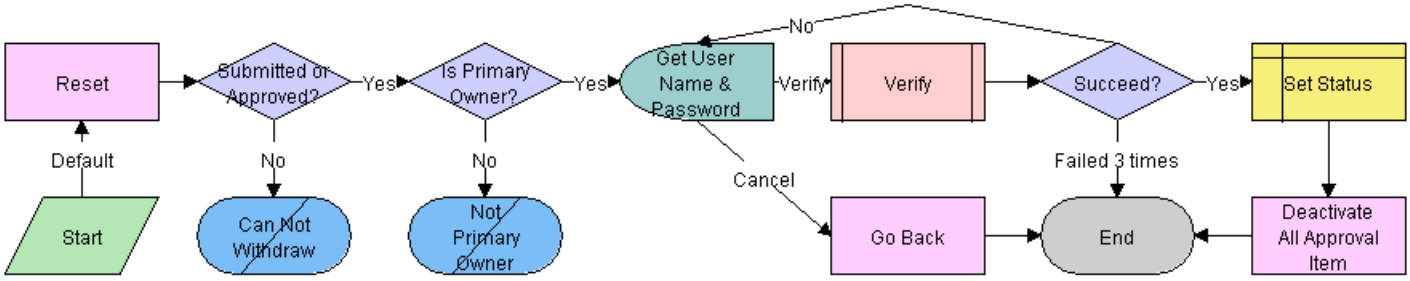
This workflow performs the following actions:

1. Checks if the current record has already been submitted. If it has, the workflow ends.
2. Checks if the current record has an owner, if the owner has a manager, and if the product issue record that generated this record has a primary owner. If these criteria are not met, the workflow ends.
3. Calls the LS Medical User Verification workflow. If the authentication does not pass, the workflow ends.
4. Sets the status to Submitted and the sub-status to Waiting.
5. Deactivates any approval record associated with the current product analysis record.
6. Creates an inactive approval record for the current owner (for record purposes).
7. Creates approval items for the owner's manager and for the owner of the product issue.

LS Medical PA Withdraw Workflow

This workflow is initiated from the Withdraw button on the Repairs screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Checks if the current record has already been submitted. If it has not, the workflow ends.
2. Checks if the user is the primary owner. If not, the workflow ends.
3. Calls the LS Medical User Verification workflow. If the authentication does not pass, the workflow ends.
4. Sets the status to Reopen.
5. Deactivates any approval record associated with the current product analysis record.

22 Managing Corrective and Preventative Actions

Managing Corrective and Preventative Actions

This chapter covers the following topics:

- *About Managing Corrective and Preventative Actions*
- *Scenario for Managing Corrective and Preventive Actions*
- *Process of Managing Corrective and Preventive Actions*

About Managing Corrective and Preventative Actions

This chapter describes recording and managing corrective actions and preventive actions (CAPAs) for Siebel Adverse Events and Complaints Management (Siebel AECM).The following table defines and distinguishes these two terms. But generally, corrective and preventive actions are called CAPAs; this is how they will be referred to generically in this chapter.

Term	Definition from ISO 8402	Example
Corrective Action	Action taken to eliminate the causes of an existing non-conformity, defect, or other undesirable situation in order to prevent recurrence.	When devices were returned because of damage caused by electrostatic discharge (ESD) during assembly, the corrective actions were (i) implementation of ESD controls and (ii) ESD control training for operators.
Preventative Action	Action taken to eliminate the cause of a potential non-conformity, defect, or other undesirable situation in order to prevent occurrence.	When control charts indicated the diameter of a molded part was drifting towards the upper limit, the preventive action was to replace the mold and validate that the new parts met the specifications.

The CAPA record in Siebel AECM is designed to contain all information about a corrective or preventive action: from its creation through planning and implementation through authentication, closure and beyond.

Related Topics

Capturing Adverse Events and Complaints

Investigating Adverse Events and Complaints

Recording Product Analysis for Adverse Events and Complaints Management

Regulatory Reporting

Communicating with Customers for Adverse Events and Complaints Management

Closing Adverse Events and Complaints

Scenario for Managing Corrective and Preventive Actions

This scenario is an example process performed by the Siebel administrator, and the corrective and preventive action team. Your company might follow a different process according to its business requirements.

This process is designed to illustrate the functionality of Siebel AECM.

The Siebel Administrator

The administrator sets up the activity templates that the corrective and preventive action team members use in the course of planning, implementing, and verifying corrective and preventive actions.

Before creating these templates, the administrator consults with the corrective and preventive action team. It is very important that the activities defined by the template accurately and completely reflect the company's policies and procedures for the handling of corrective and preventive actions.

The administrator also checks the necessary codes for CAPA have been set up as appropriate for the company's business needs.

The Corrective and Preventive Action Team Members

The product analysis team has alerted the CAPA team that some of the cartridges used in the new blood analyzer are out of tolerance and that this is causing them to jam in the analyzer. The CAPA team is responsible for correcting this problem.

The CAPA manager creates a corrective action record. He fills in all the information known about the problem and its root cause, including the associated product analysis and product issue records. The CAPA team use this record as the project file, referring and adding to it throughout the life cycle of the CAPA.

All information associated with the CAPA is stored and accessible from this record. The information takes a variety of forms, from short comments where employees share information about recent actions and findings, to longer notes (both public and private), and large documents such a reports and specs that are saved as file attachments.

The CAPA manager uses the activity template to generate a standard set of activities that outline the team's standard operating procedure for implementing corrective and preventive actions. He assigns the activities to members of his team. The manager uses the list of activities to monitor the progress of the CAPA; noting the start and end dates and which activities have been completed and which are still to be done.

CAPA team members are assigned activities, with start and due dates. They carry out their assigned activities, recording the tools and parts used, how long each activity takes to complete, and the results and measurements obtained.

Major milestone dates, both target and actual, are recorded on the main form of the CAPA record. Also the approval history of the CAPA record is tracked as changes in the CAPA's status are made, from Open, through Approved, to Verification.

Process of Managing Corrective and Preventive Actions

This example process represents the tasks that are carried out in the *Scenario for Managing Corrective and Preventive Actions*.

Administrator Procedures

- *Creating Corrective Action Activity Templates*
- *Setting Up Codes for Corrective and Preventive Actions*

End-User Procedures

- *Creating a CAPA Record*
- *Managing Corrective and Preventive Actions*
- *Tracking Approvals and Other Changes to Corrective and Preventive Actions*

Creating Corrective Action Activity Templates

Corrective action activity templates are used to create a standard sets of activities that the CAPA team follow as they plan, implement, and verify a CAPA.

This task is a step in *Process of Managing Corrective and Preventive Actions*.

To create a corrective action activity template

1. Navigate to the Administration - Data screen, then the Activity Templates view.
2. In the Activity Templates list, create a new record and complete the necessary fields.
    a. Set the Type field to Corrective Action.
    b. Set start and end dates for the activities by specifying Lead Times and Durations.
    c. Leave these fields blank: Sales Stage and Sales Method; they do not apply to product issue activities.
3. Associate individual activities with the template, as described in *Siebel Applications Administration Guide* .

Setting Up Codes for Corrective and Preventive Actions

The administrator defines the codes that are used to categorize corrective and preventive actions and their root causes.

This task is a step in *Process of Managing Corrective and Preventive Actions*.

To set up codes for corrective and preventive actions

- See *Setting Up Codes*.

Note: Typically, you create codes of type Corrective Action for use with CAPA records. However, all types of codes can be associated with CAPA records.

Creating a CAPA Record

Corrective actions can be created and viewed in these screens:

- **Corrective Actions.**When a CAPA record is created in this screen, no default type is associated with the CAPA.
- **Product Issues.** When a CAPA record is created in this screen, the default type is Product Issue.
- **Repairs**. When a CAPA record is created in this screen, the default type is Product Analysis.

When a CAPA is created from the Product Issues or the Repairs screen, a CAPA number is assigned automatically. You can configure the application to copy information from the Product Issue or the Product Analysis record to the CAPA record. Review the configuration of the Create Product Issue button (see *About Configuring Adverse Events and Complaints Capture*) for an example of a similar configuration.

This task is a step in *Process of Managing Corrective and Preventive Actions*.

To create a CAPA record in the Corrective Actions screen

1. Navigate to the Corrective Actions screen, then the Corrective Action List view.
2. In the Corrective Action List, create a new record and complete the necessary fields.
   Some fields are described in the following table. Note that some of these fields are filled in when the CAPA is first created, and other fields are filled in later in the CAPA investigation.

Field	Comments
Accounts	The accounts requiring the fix.
Actual Fixed	The date when the fix was actually implemented.
Area	Classification for the corrective action. The Type field constrains this drop-down list.
Asset #	For example, the asset number of the first machine to which the fix is applied.
CA #	Unique number to identify the CAPA. It is auto-generated when the CAPA record is created.
Codes	Typically, select codes of type Corrective Action. Example uses:

Field	Comments
	◦ Use codes to indicate the root cause of the CAPA. ◦ Use codes to classify the CAPA.
Comments	Use this field to record and share short notes during the life cycle of the CAPA.
Corrective Action	Detailed description of the corrective action and its root cause.
Fix Age	Number of days since the Actual Fixed date.
Lot #	For example, the first lot number to which the fix is applied.
Mfg Name	Typically this is the (internal) manufacturing site.
Serial #	Serial number of the asset. This field is automatically populated if there is a serial number associated with the asset.
Status	Changes to this field are tracked in the Approvals view.
Sub Area	The Area field constrains this drop-down list.
Sub Status	The Status field constrains this drop-down list.
Target	The version of the product targeted to have the fix.
Type	The type of corrective action: Product Analysis, Product Issue, Manufacturing, Preventive Action, Other.

3. Drill down on a record in the Corrective Action List.
4. Click the Related Products tab, create new records for the products related to the CAPA, and complete the necessary fields.
5. Click the Product Issues tab, create new records for any product issue related to the CAPA, and complete the necessary fields.
6. Click the Product Analysis tab, create new records for any product analyses related to the CAPA, and complete the necessary fields.

Managing Corrective and Preventive Actions

Use the views on the Corrective Actions screen to store, maintain, and share many types of information about a CAPA.

Typically several employees are assigned ownership of a CAPA record and are assigned activities related to the CAPA. All owners update the CAPA record during the course of the CAPA's life cycle.

This task is a step in *Process of Managing Corrective and Preventive Actions*.

To add information to CAPA records

1. Navigate to the Corrective Actions screen, then the Corrective Action List view.
2. In the Corrective Action List, drill down on a CAPA record.
3. Modify the record by editing the Status, Comment, and Date fields.
4. Create activity plans for the CAPA record as follows:
    a. Click the Activity Plans tab and in the Activity Plans list, create a new record and complete the necessary fields.

       Some fields 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.
Template	Only templates whose type is Corrective Action can be selected in this field.

    b. Modify the activities in the Activities list or create new activities as required.
5. Create private and public notes for the CAPA record using the Notes tab.
6. Associate files to the CAPA record using the Attachments tab.

For general information about activities, notes, and attachments, see *Siebel Fundamentals* .

Tracking Approvals and Other Changes to Corrective and Preventive Actions

Changes in the status of the CAPA record are tracked in the Approvals view. Changes to other fields in the CAPA record can be seen in the Audit Trail view. For information about enabling Audit Trail, see *Siebel Applications Administration Guide* .

> **Note:** For information about configuring the Corrective Action screen to use buttons and workflows for changing the status of a CAPA record, see *About Configuring CAPA Approvals*.

This task is a step in *Process of Managing Corrective and Preventive Actions*.

To track approval history and other changes to CAPA records

1. Navigate to the Corrective Actions screen, then the Corrective Action List view.
2. In the Corrective Action List, drill down on a CAPA record.
3. Click the Approvals tab.

   Changes in the Status of the CAPA record is tracked in this view.
4. Click the Audit Trail tab.

   Changes made to fields in the CAPA record are tracked in this view.

About Configuring CAPA Approvals

There are no buttons or workflows associated with the Corrective Actions screen.

However, you can configure your application with Submit and Withdraw buttons and workflows similar to those used for approving product analysis records on the Repairs screen.

See:

- *About Configuring Product Analysis Approvals* for specific information on the product analysis approval workflows
- *Configuring Siebel Business Applications* for information about how to configure buttons
- *Siebel Business Process Framework: Workflow Guide* for information about how creating workflows

23 Regulatory Reporting

Regulatory Reporting

This chapter covers the following topics:

- *About Regulatory Reporting*
- *About Regulatory Reports*
- *Scenario for Regulatory Reporting*
- *Process of Regulatory Reporting*
- *Field Mapping for the MedWatch Report*
- *Field Mapping for the MDV Report*
- *About Configuring Buttons in Regulatory Reports*

About Regulatory Reporting

This chapter describes how to use the Siebel Business Application to create and manage regulatory reports for product complaints and adverse events. The reports are generated with unique and sequential numbers and formatted ready for submission to the FDA or other regulatory agencies.

Where to Find More Information

The following chapters describe other aspects of the complaints and adverse events management process:

- *Capturing Adverse Events and Complaints*
- *Investigating Adverse Events and Complaints*
- *Recording Product Analysis for Adverse Events and Complaints Management*
- *Managing Corrective and Preventative Actions*
- *Communicating with Customers for Adverse Events and Complaints Management*
- *Closing Adverse Events and Complaints*

About Regulatory Reports

From the time an adverse event or complaint is confirmed as reportable, companies generally have less than 30 days to report to a regulatory agency. An adverse event or complaint can be verified as reportable at various stages of the AECM process, from the initial customer call through to the review of the findings by the analysis team. Companies usually follow certain assessments that determine if an adverse event or complaint is reportable or not.

Separate reports have to be filed for each product that malfunctioned or caused the adverse event. Reports filed are based on the product issue, which typically contains much of the needed information. After the initial report, companies generally file additional supplemental, summary, and annual reports to update information on the investigation and resolution process.

The preconfigured Siebel AECM module supports MedWatch and MDV reports:

- **MedWatch Reports.**
  Using Siebel AECM, you can automatically generate MedWatch 3500A reports. Sections A to H of the report are populated from the relevant fields in the regulatory report record. The completed report can be saved and submitted electronically to the FDA using the electronic Medical Device Reporting (eMDR) process.
  For more information about eMDR refer to *About Electronic Medical Device Reporting*.
- **MDV Reports.**
  Medical device companies operating in multiple countries report adverse events or complaints to the various NCAs using the MDV form. Unlike MedWatch reports, there is no standard template for the MDV form. However, the Global Harmonization Task Force (GHTF) has guidelines.
  The report created by Siebel AECM follows these guidelines. For more information, see http://www.ghtf.org.

About Report Types

The following table details the four regulatory reports that can be created in Siebel AECM.

Report Type	Use	Data for the Report Is Taken from These Views in the Regulatory Reports Screen
3500A	For initial mandatory reports to MedWatch (FDA).	• More Info • Patient • Importer (if the Facility Type field in the Importer view is not blank) • Manufacturer and Investigation (if the Facility Type field in the Importer view is blank)
3500A Supplemental	For additional information to MedWatch after initial reports have been submitted.	• More Info • Patient • Importer (if the Facility Type field in the Importer view is not blank) • Manufacturer and Investigation (if the Facility Type field in the Importer view is blank)
MDV Initial	For initial reports to NCAs who accept MDV forms.	• More Info • Patient • MDV
MDV Follow-up	For additional information to NCAs after initial reports have been submitted.	• More Info • Patient • MDV

About Electronic Medical Device Reporting

For customers using the AECM process within the United States, you can submit an eMDR using the Siebel Business Application. Doing so transmits an XML message in HL7 ICSR format to the FDA. Moreover, you can also manage batch submission, and view their confirmation status by referring to the FDA Status field once they have been submitted.

The FDA has created a single system to accept individual, batch, and summary medical device adverse event reports by way of the FDA electronic gateway server. For additional information about the FDA electronic gateway server and FDA standards for eMDR from the FDA, refer to http://www.fda.gov/ForIndustry/FDAeSubmitter/ucm107914.htm.

For information about eMDR transmission using the Siebel Business Application, refer to *Transmitting Electronic Medical Device Reporting Immediately*, and *Managing Batch Electronic Medical Device Reporting*.

About FDA Confirmations for Electronic Medical Device Reporting

Once an eMDR or a batch eMDR has been transmitted to the FDA, the FDA Electronic Submissions Gateway (ESG) will respond to the submission. Depending on the processing state, the FDA Status field may be in any of the following three states:

- **1 of 3 - ESG.** Indicates that FDA ESG has sent a Message Delivery Notification (MDN) to confirm that the submission was received. The message includes an official date received.
- **2 of 3 - ESG.** Indicates that FDA ESG has sent an MDN to confirm that the submission has reached the Center for Devices and Radiological Health (CDRH).
- **3 of 3 - ESG.** Indicates that CDRH has sent a message to confirm that the submission has been successfully loaded into the Adverse Event database, or that it has been rejected.

For information about eMDR transmission using Siebel Business Application, refer to *Transmitting Electronic Medical Device Reporting Immediately*, and *Managing Batch Electronic Medical Device Reporting*.

Scenario for Regulatory Reporting

This scenario is an example process performed by the Siebel administrator and the quality manager. Your company might follow a different process according to its business requirements.

This scenario is designed to illustrate the functionality of Siebel AECM.

Introduction

A complaint about a cartridge for a blood analyzer machine has been made to the manufacturer. The complaint has been assessed; it needs to be reported to the FDA. A product issue record has already been set up and contains a lot of information about the complaint.

The Siebel Administrator

The administrator is responsible for setting up the report number schema for the organization. The company started using Siebel AECM in the middle of the year. Because the company had already submitted eight MedWatch 3500A reports to the FDA, the administrator sets the report number sequence to start at 9.

Quality Manager

It is the quality manager's responsibility to prepare the initial MedWatch 3500A form and send it to the FDA. First, she creates a new regulatory report record and populates the record with data from the product issue. Then she reviews the data.

Because her company manufactures the cartridge, she enters data into the Manufacturer and Investigation views. This data will appear in sections G and H of the MedWatch 3500A form.

Satisfied that the necessary data has been entered, she generates the MedWatch 3500A report. This report is a facsimile of the MedWatch 3500A form. But, it is also a standard Siebel report, so the quality manager prints it as she would any other Siebel report.

After reviewing the printed version of the report, she submits it. When she submits the report record, two things happen:

- A report number is generated.
- Most fields in the report record become read-only.

It is the submitted version of the MedWatch 3500A form that the quality manager sends to the FDA.

The quality manager complied with regulations by sending her initial report within 30 days of the company becoming aware of the issue. However, the product analysis had not been completed at that time. Later, the product analysis team discovers the root cause of the cartridge failure, and the quality manager submits a supplemental report to the FDA.

Process of Regulatory Reporting

This example process represents the tasks that are carried out in the *Scenario for Regulatory Reporting*.

Administrator Procedures

- *Setting Up Report Numbers*

End-User Procedures

1. *Creating and Populating New Regulatory Reports*
2. *Entering and Reviewing Data for 3500A Reports*, or
3. *Entering and Reviewing Data for MDV Reports*
4. *Running 3500A and MDV Reports*

5. *Generating Regulatory Report Numbers and Submitting Reports*
6. *Transmitting Electronic Medical Device Reporting Immediately*
7. *Managing Batch Electronic Medical Device Reporting*
8. *Reopening a Regulatory Report*
9. *Creating Supplemental or Follow-Up Regulatory Reports*

Additional End-User Procedure

This end-user procedure is not part of the scenario described:

- *Reopening a Regulatory Report*

Setting Up Report Numbers

The administrator determines the numbering scheme for regulatory reports. The number is generated automatically when the regulatory report record is submitted. The report number is made up of concatenated fields. The report number field is incremented by 1 each time a report is generated for a new product issue.

- **MedWatch 3500A.** Report numbers of this type, are the concatination of these fields: Manufacturer Id, Report Year, Report Number. For example: XERCO-2003-0004.
- **MDV Initial.** Report numbers of this type are the concatenation of these fields: MDV Id, MDV Report Number. For example: MEDDEV-000008.

This task is a step in *Process of Regulatory Reporting*.

To set up report numbering scheme

1. Navigate to Administration - Group screen, then the Organizations view.
2. In the Organizations list, select your organization.
3. To set up numbering for MedWatch 3500A reports, complete the following fields.

Field	Comments
Manufacturer Id	None.
Report Year	None.
Report Number	Set to zero to have the first report numbered 0001.

4. To set up numbering for MDV Initial reports, complete the following fields.

Field	Comments
MDV Id	

Field	Comments
MDV Report Number	Set to zero to have the first report numbered 000001.

Creating and Populating New Regulatory Reports

The best way to create a regulatory report record is from the product issue record. When a report is created from the regulatory report, fields (for example, products) can be populated from the product issue record to the regulatory report record.

There are two kinds of initial regulatory report that you can create:

- MedWatch 3500A
- MDV Initial

Note: If you want to create supplemental or follow-up reports, see *Creating Supplemental or Follow-Up Regulatory Reports*.

CAUTION: Regulatory report records cannot be deleted.

This task is a step in *Process of Regulatory Reporting*.

To create a regulatory report record

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue.
3. Click the Regulatory Reports tab.
4. In the Regulatory Reports list, create a new record and complete the necessary fields.

   When a regulatory report is created:

   - The following fields are copied from the product issue: PI# and SR #
   - The following fields are set with a default value: Status is set to In Progress, Owner is set to *Creator of the record*
5. For the new record, set the Report Type field to MedWatch 3500A or MDV Initial.
6. Click Populate Report.

   This starts the LS Medical Product Issue Populate Report workflow, which copies data from the product issue according to the report type. For more information about the workflow, see *LS Medical Product Issue Populate Report Workflow*.

Entering and Reviewing Data for 3500A Reports

When you populate a regulatory report, many fields are copied from the product issue record. When you edit these fields in the regulatory report record, the edits are not copied back to the product issue record.

Note: The process described here is to enter data in the Manufacturer, Investigation, and Importer views of the *Regulatory Reports* screen. However, an alternate way is to enter the data in these views in the *Product Issues* screen before the regulatory report is populated. If you use the Product Issues screen, you have copies of the data in both the product issue record and in the regulatory report record.

This task is a step in *Process of Regulatory Reporting*.

To review and enter data for the 3500A report

1. Navigate to Regulatory Reports screen, then the Regulatory Report List view.
2. In the Regulatory Report List, drill down on a 3500A regulatory report record.
3. Review and if necessary modify the information in the More Info and Patient views.
4. If you are a manufacturer:
    a. Make sure that the Facility Type field in the Importer view is blank. By default, this field is set to blank.
    b. Complete the fields in the Manufacturer view.

    These fields populate section G of the 3500A form. Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
(A)NDA #	The abbreviated new drug application or the new drug application number. This field is automatically populated if there is an (A)NDA number associated with the protocol site.	G5
10-day	Select the check box to indicate the report is a 10-day report.	G7
15-day	For reports of serious and unexpected adverse events.	G7
5-day	For events requiring remedial action to prevent unreasonable risk to public health, or where written notice is required.	G7
Address	Manufacturer contact office address - Street.	G1

Field	Comments	Mapping to 3500A Form
AE Terms	List of adverse event terms that most accurately characterize the adverse event described in Event Detail section.	G8
City	Manufacturer contact office address - City.	G1
Consumer	Report Source is the consumer or treating health care provider.	G3
Contact Name	Manufacturer contact's last name.	G1
Contact Office	Manufacturer's contact office.	G1
Country	Manufacturer contact office address - Country.	G1
Distributor	Check this if report was received from the distributor (importer) of the suspect product.	G3
First Name	Manufacturer contact's first name.	G1
Follow-up	Check if the report is a follow-up to a previously submitted report.	G7
Follow-Up #	Follow-up sequence number.	G7
Foreign	Report Source is a foreign source (for example, foreign medical facility, affiliate, or government).	G3
IND #	The investigational new drug (IND) application number. This field is automatically populated if there is an IND number associated with the protocol site.	G5
Initial	Check if the report is the first submission of a manufacturer report (30 day report for device).	G7
Literature	Report Source is the scientific literature or an unpublished manuscript.	G3

Field	Comments	Mapping to 3500A Form
Mfg Report #	Regulatory report number.	G9
OTC Product	Check if the suspect medication can be purchased over-the-counter (without a prescription).	G5
Other	Report Source is any source not covered by the previous categories.	G3
Periodic	For reports of serious labeled and non-serious (labeled and unlabeled) adverse events.	G7
Phone #	Manufacturer contact's work phone number.	G2
PI Received	The date when a company representative became aware of the event.	G4
Postal Code	Manufacturer contact office address - Postal Code.	G1
Pre-1938	Check the box if the suspect medication was marketed prior to 1938 and does not have an NDA #.	G5
Products	Product(s) involved in the event.	
Professional	Report Source is a physician, pharmacist, nurse, and so on.	G3
Protocol #	Protocol number identifies the clinical trial at a site. If regulatory report is an IND safety report, enter the protocol number.	G6
Received Report #	Report number for the MedWatch form received from a Importer or a User Facility.	MedWatch Header
Representative	Check this if a company representative reported the event based on information from a health professional.	G3
State	Manufacturer contact office address - State.	G1

Field	Comments	Mapping to 3500A Form
Study	Report Source is a postmarketing, clinical trial, surveillance, or other study.	G3
User Facility	Check this if the manufacturer received the report from the MDR contact in a user facility as identified in section F.	G3

5. If you are a device manufacturer, complete the fields in the Investigation view.

   These fields populate section H of the 3500A form. Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
Evaluation	If an evaluation was conducted, note summary here and choose Evaluation Summary Attached in Evaluated by Mfg Field.	H3
Death	Check only if the death was an outcome of the adverse event.	H1
Correction	Do not check when creating an initial report. Follow-up with changes to previously submitted information.	H2
Serious Injury	Event is life-threatening, results in permanent impairment, requires intervention to prevent permanent impairment.	H1
Additional Information	Do not check when creating an initial report. Information concerning the event that was not provided in the initial report.	H2
Malfunction	Device malfunctions.	H1
Response to FDA Request	Do not check when creating an initial report. Additional information requested by FDA concerning the device/event.	H2
Other	Event not covered by death, serious injury, or malfunction. This type of category should be rarely used.	H1

Field	Comments	Mapping to 3500A Form
Device Evaluation	Do not check when creating an initial report. Evaluation/analysis of device.	H2
Mfg Narrative	Any additional information, evaluation, or clarification of data presented in previous sections.	H10
Recall	Remedial Action - Recall.	H7
Method Codes	Method codes capture two items — the source of the device that was evaluated and the type of evaluation performed. Do not enter more than four codes.	H6
Repair	Remedial Action - Repair.	H7
Result Codes	Describes the results of evaluation and analyses of the reported device problem(s). Do not enter more than four codes.	H6
Replace	Remedial Action - Replace.	H7
Conclusion Codes	Describes the evaluation conclusions. Do not enter more than four codes.	H6
Relabeling	Remedial Action - Relabeling.	H7
Evaluated by Mfg	If you do not check this box, then you should complete the Non-Evaluation Codes field. Identify if the device was evaluated.	H3
Notification	Remedial Action - Notification.	H7
Non-Evaluation Codes	If an evaluation of a returned medical device was NOT conducted, provide the appropriate code.	H3

Field	Comments	Mapping to 3500A Form
Corrected Data	Additional, corrected, or missing information, identifying each data item by the applicable section and block number.	H11
Inspection	Remedial Action - Inspection.	H7
Usage of Device	Indicates whether the use of the suspect medical device was the initial use, reuse, or unknown.	H8
Patient Monitoring	Remedial Action - Patient monitoring.	H7
Mfg Date	Month and year of manufacture of the suspect medical device. This field can be based on asset number (asset manufacture date) or lot number (effective start date).	H4
Modification	Remedial Action - Modification.	H7
Labeled Single Use	Indicates whether the device was labeled for single use.	H5
Other	Remedial Action - Other - Specify the type of action in this field.	H7
Correction #	If action reported to FDA under 21 USC 360i(f), list correction or removal reporting number.	H9

6. If you are a user facility or importer, complete the fields in the Importer view.

These fields populate section F of the form. Some fields are described in the following table. Note that the letter and number combination in the last column indicates how this field maps to the 3500A form.

Field	Comments	Mapping to 3500A Form
Facility Type	Indicate whether the report is from a user facility, importer, or others.	F1
Importer	Name of the distributor or importer.	F3
Contact Name	Last name of the distributor's or importer's representative to contact regarding the event.	F4

Field	Comments	Mapping to 3500A Form
Device Age	The approximate age of the device.	F9
Report #	Regulatory report # for this report, which is being submitted by an importer. This number is auto-populated when the report is generated.	F2
Address	Distributor's or Importer's address - Street Address line #1. This field is auto-populated based on the distributor's or importer's name.	F3
First Name	First name of the distributor's or importer's representative to contact regarding the event.	F4
Age UoM	Unit of measurement for device age.	F9
Report Type	Indicates if the report to the regulatory agency will be an initial or follow-up report.	F7
City	Distributor's or importer's address - City.	F3
Phone #	Contact's work phone number.	F5
Patient Codes	Patient codes describe what happened to the patient as a result of the event. Do not enter more than three codes.	F10
Follow-up #	Sequence number of the follow-up report.	F7
Postal Code	Distributor's or importer's address - Postal Code.	F3
Reported FDA	Indicates if the distributor or importer has already sent a report to the regulatory agency.	F11
Device Codes	Device codes describe device failures or problems encountered during the event. Do not enter more than four codes.	F10

Field	Comments	Mapping to 3500A Form
Reported Mfg	Indicates if the distributor or importer has sent a report to the manufacturer.	F13
State	Distributor's or importer's address - State.	F3
FDA Report Date	Date the report was sent to the regulator agency.	F11
Event Location	Location of the actual occurrence of the event.	F12
Mfg Report Date	Date the report was sent to the manufacturer.	F13
Country	Distributor's or importer's address - Country.	F3
PI Received	The date when a company representative became aware of the event.	F6

Entering and Reviewing Data for MDV Reports

When you populate the regulatory report, many fields are copied from the product issue record. When you edit these fields in the regulatory report record, the edits are not copied back to the product issue record.

> **Note:** The process described here is to enter data in the MDV view in the Regulatory Reports screen. However, an alternate way is to enter the data in the MDV view in the Product Issues screen *before* the regulatory report is populated. If you use this alternative, you have copies of the data in both the product issue record and in the regulatory report record.

This task is a step in *Process of Regulatory Reporting*.

To review and enter data for an MDV Initial report

1. Navigate to Regulatory Reports screen, then the Regulatory Report List view.
2. In the Regulatory Report List, drill down on an MDV regulatory report record.
3. Review and if necessary modify the information in the More Info and Patient views.
4. Click the MDV tab.

5. On the MDV form, complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
MDV Report #	MDV Report number. This number is auto-populated when the report is generated.
Authorities	The name of the regulatory agencies to send the report to.
Affiliate Acct	The affiliate account representing the company.
PI Received	The date when the company became aware of the event.
Determination	The type of the reportable event for MDV reporting.
Patient Codes	Patient codes describe what happened to the patient as a result of the event.
Device Codes	Device codes describe device failures or problems encountered during the event.
Usage of Device	Indicates whether the use of the suspect medical device was the initial use, reuse, or unknown.
Follow-up Date	Date field to indicate the approximate follow-up or final report date.
Approval Org	The approval body for the device.
Approval #	The approval number for the device.
Evaluation	If the evaluation was conducted, note summary here and choose Evaluation Summary Attached in Evaluated by Mfg field.
Mfg Narrative	Any additional information, evaluation, or clarification of data presented in previous sections.

Running 3500A and MDV Reports

Siebel AECM uses the Siebel Reports Server to create formatted reports suitable for submitting to the FDA or other regulatory agency.

Typically, the user views the report:

- Before generating it, to make sure that the data is correct
- After generating it, to print a final report for sending to the FDA or other regulatory agencies

Note: The fields used to fill in the report are those in the regulatory report record (not the product issue record).

This task is a step in *Process of Regulatory Reporting*.

To run a report

1. Navigate to the Regulatory Reports screen, then the Regulatory Report List view.
2. In the Regulatory Report List, drill down on a report.

For this type of report...	Navigate to one of these views...	Select this report from the Reports button menu
MedWatch 3500A	o More Info o Patient o Importer o Manufacturer o Investigation	3500A
MVD	o More Info o Patient o MDV	MDV

3. Run, print, and save the report as necessary. For information about reports, see *Siebel Fundamentals* .

Which Sections of the MedWatch 3500A Form Are Filled In?

Not all sections of the MedWatch 3500A are filled in for every report. Which sections are filled in depends upon the Event Type and Facility Type fields. The Event Type field is in the More Info view of the Regulatory Reports screen. The Facility Type field is in the Importer view of the Regulatory Reports screen.

These sections always are filled in:

- A. Patient Information
- B. Adverse Event or Product Problem
- E. Initial Reporter

The following table describes the conditions for which the other sections get filled in.

If...	And...	These sections are filled in...	And these sections can remain blank...
Event Type = Adverse Event Drug, Product Problem Drug, or AE and PP Drug	—	C G	D F H
Event Type = Adverse Event Device, Product Problem Device, or AE and PP Device	Facility Type = NULL (blank)	D G H	C F
Event Type = Adverse Event Device, Product Problem Device, or AE and PP Device	Facility Type = User Facility, Distributor, or Importer (That is, not blank)	D F G	C H

Generating Regulatory Report Numbers and Submitting Reports

When you generate a 3500A or MDV initial report:

- The report number is generated and filled in
- The Status field changes to Submitted
- The fields in the regulatory report record become read-only (except for the Sub Status field)

Only the primary owner of the regulatory report can generate the report number and submit the report.

This task is a step in *Process of Regulatory Reporting*.

To generate and submit a regulatory report

1. Make sure the application is running on a server database.

   You cannot generate a report number on the Siebel Mobile Web Client.
2. Navigate to Regulatory Reports screen, then the My Regulatory Reports view.
3. In the Regulatory Report List, drill down on a regulatory report with status of In Progress.
4. Click Generate.

   This starts the LS Medical Product Issue RR Submit workflow, which authenticates the user, adds a number for the regulatory report, changes the status to Submitted, and makes all fields except Sub Status read-only.

For more information about the workflow, see *LS Medical Product Issue RR Submit Workflow*.

5. To submit the regulatory report to the FDA, click eMDR Queue.
   This changes the Sub Status of the report to eMDR and places the report in the queue to be sent to the FDA at the end of the month. If you want to submit the report immediately, follow the instructions outlined in *Transmitting Electronic Medical Device Reporting Immediately*.

Transmitting Electronic Medical Device Reporting Immediately

Occasionally, you may be made aware of a unique medical device report that cannot wait until month-end processing, and must be reported to the FDA immediately.

For more information about rules and guidelines for regulatory reporting delays, refer http://www.fda.gov/MedicalDevices/DeviceRegulationandGuidance/GuidanceDocuments/ucm149672.htm.

To force immediate FDA reporting

1. Navigate to Regulatory Reports screen, then the eMDR view.
   A list of all regulatory reports whose RR Sub Status is eMDR will be listed.
2. In the eMDR list, select the regulatory report you want to transmit.
   Regulatory reports that have not yet been transmitted will have Transmission Status set to Not Transmitted.
3. Click Transmit.

   Note: The Transmit button will be grayed out if the regulatory report has already been transmitted or has been overridden.

Once transmitted, monitor the FDA Status field of the eMDR for FDA confirmation. For more information on confirmation statuses, refer to *About FDA Confirmations for Electronic Medical Device Reporting* .

Managing Batch Electronic Medical Device Reporting

Occasionally, you may want to submit multiple medical device reports as a batch. For example, if you are submitting 100 month-end reports, creating a batch enables you to submit reports in one transmission rather than 100 individual transmissions.

To create a batch e MDR and populate it with regulatory reports

1. Navigate to Regulatory Reports screen, then the eMDR Batch view.
   A list of existing eMDR batches will appear.
2. In the eMDR batch list, create a new record and complete the necessary fields.
3. For the new record, enter any unique alpha numeric string in the Batch # field.
4. Navigate to Regulatory Reports screen, then the eMDR view and do the following:
   a. Identify a regulatory report that you want to include in batch, and modify the Batch # field to the one specified in Step 3.
   b. Repeat Step a for every regulatory report that you want to include in the batch.

This regulatory reports will remain in the eMDR queue and will be sent as part of a batch to the FDA at month end.

5. To transmit the batch immediately, do the following:
   a. Navigate to Regulatory Reports screen, then the eMDR Batch view,
   b. Select the batch created in Step 3, and then click Transmit.

Note: Once transmitted, you should monitor the FDA Status field of the batch for FDA confirmation. For more information on confirmation statuses, refer to *About FDA Confirmations for Electronic Medical Device Reporting* .

Reopening a Regulatory Report

If you want to make a change in a generated (submitted) regulatory report record, you need to reopen it. Only the primary owner of the regulatory report can reopen it.

When you reopen a report:

- The Status field changes to Reopen
- The fields in the regulatory report record can be edited

This task is a step in *Process of Regulatory Reporting*.

To reopen a regulatory report

1. Navigate to Regulatory Reports screen, then the Regulatory Report List view.
2. In the Regulatory Report List, drill down on a regulatory report with status of Submitted.
3. Click Reopen.

   This starts the LS Medical Product Issue RR Reopen workflow, which authenticates the user and changes the status of the report to Reopen.

   For more information about the workflow, see *LS Medical Product Issue RR Reopen Workflow*.

Creating Supplemental or Follow-Up Regulatory Reports

Often, it is necessary to follow-up an initial report with a follow-up report that provides supplementary information to the regulatory agency.

When you run a supplemental or follow-up report, the report should contain the initial report number and any corrected or new data.

CAUTION: Regulatory report records cannot be deleted.

This task is a step in *Process of Regulatory Reporting*.

To create a follow-up or supplemental regulatory report

1. Navigate to Product Issues screen, then the Product Issue List view.

2. In the Product Issue List, drill down on a product issue.
3. Click the Regulatory Reports tab.
4. In the Regulatory Reports list, create a new record and complete the necessary fields.

   When the regulatory report is created:

   - The following fields are copied from the product issue: PI # and SR #
   - The following fields are set with a default value: Status is set to In Progress, Owner is set to *Creator of the record*.
5. Set the Report Type field to 3500A Supplemental or MDV Follow-up.
6. Click Populate Report.

   The Populate Report button only copies the initial report number to the supplemental report. (No other fields are copied.) You can configure the application to copy additional fields such as Mfg Narrative and Corrected Data to the supplemental report. Review the LS Medical Product Issue Populate Report Workflow for an example of a similar configuration.
7. If you are a device manufacturer preparing a 3500A Supplemental report, make sure to check a Follow-Up Type in the Investigation view.
8. After creating a follow-up or supplemental regulatory report, you can view it, submit it, reopen it in the same way as a initial report:
   - *Running 3500A and MDV Reports*
   - *Generating Regulatory Report Numbers and Submitting Reports*
   - *Reopening a Regulatory Report*

Field Mapping for the MedWatch Report

The following table shows how the fields in the Regulatory Reports screen map to the fields in the MedWatch 3500A report. If the content for text fields extends to continuation pages, it starts from the third page. Note the following about the different areas on the Location MedWatch Form 3500A:

- A: Patient Information
- B: Adverse Event or Product Problem
- C: Suspect Medication(s)
- D: Suspect Medical Device
- E: Initial Reporter
- F: For Use by User Facility/Importer (Devices Only)
- G: All Manufacturers
- H: Device Manufacturers Only

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
A1	Patient Identifier	Patient

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
A2	Age	Patient
A2	Date of Birth	Patient
A3	Gender	Patient
A4	U/M	Patient
A4	Weight	Patient
B1	Event Type	More Info (Event Detail)
B2	Congenital Anomaly	More Info (Event Detail)
B2	Date of Death	More Info (Event Detail)
B2	Death	More Info (Event Detail)
B2	Disability	More Info (Event Detail)
B2	Hospitalization	More Info (Event Detail)
B2	Life Threatening	More Info (Event Detail)
B2	Other	More Info (Event Detail)
B2	Required Intervention	More Info (Event Detail)
B3	Event Date	More Info (Event Detail)
B4	Report Date	More Info, Regulatory Reports screen only
B5	Description	More Info (Event Detail)
B6	Tests/Data	More Info (Event Detail)

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
B7	Relevant History	More Info (Event Detail)
C1	Product	More Info (Products)
C2	Dose Per Unit	More Info (Products)
C2	Frequency	More Info (Products)
C2	Route Used	More Info (Products)
C3	Therapy From Date	More Info (Products)
C3	Therapy To Date	More Info (Products)
C4	Indication	More Info (Products)
C5	Event Abated	More Info (Products)
C6	Lot #	More Info (Products)
C7	Expiration Date	More Info (Products)
C8	Reintroduce Reoccur	More Info (Products)
C9	NDC#	More Info (Products)
C10	External Products	More Info (Event Detail)
D1	Product	More Info (Products)
D2	Common Device Name	More Info (Products)
D3	City	More Info (Products)

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
D3	Mfg Name	More Info (Products)
D3	Postal Code	More Info (Products)
D3	State	More Info (Products)
D3	Street Address	More Info (Products)
D4	Asset #	More Info (Products)
D4	Catalog #	More Info (Products)
D4	Expiration Date	More Info (Products)
D4	Lot #	More Info (Products)
D4	Model #	More Info (Products)
D4	Part #	More Info (Products)
D4	Serial #	More Info (Products)
D5	Device Operator	More Info (Products)
D6	Implant Date	More Info (Products)
D7	Explant Date	More Info (Products)
D8	Reprocessed	More Info (Products)
D9	Reprocessor	More Info (Products)
D10	Device Available	More Info (Products)
D10	Return Date	More Info (Products)

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
D11	External Products	More Info (Event Detail)
E1	Account	More Info
E1	Address	More Info
E1	City	More Info
E1	Contacts (Contact Last Name in list)	More Info
E1	CSN #	More Info
E1	First Name (Contact First Name in list)	More Info
E1	Phone #	More Info
E1	Postal Code	More Info
E1	Site	More Info
E1	State	More Info
E2	Provider	More Info
E3	Occupation	More Info
E4	Reported FDA	More Info
F1	Facility Type	Importer
F2	Report #	Importer

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
F3	Address	Importer
F3	City	Importer
F3	Country	Importer
F3	Importer	Importer
F3	Postal Code	Importer
F3	State	Importer
F4	Contact Name	Importer
F4	First Name	Importer
F5	Phone #	Importer
F6	PI Received	Importer
F7	Follow-up #	Importer
F7	Report Type	Importer
F8	Report Date	More Info
F9	Age UoM	Importer
F9	Device Age	Importer
F10	Device Codes	Importer
F10	Patient Codes	Importer
F11	FDA Report Date	Importer

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
F11	Reported FDA	Importer
F12	Event Location	Importer
F13	Mfg Report Date	Importer
F13	Reported Mfg	Importer
G1	Address	Manufacturer
G1	City	Manufacturer
G1	Contact Name	Manufacturer
G1	Contact Office	Manufacturer
G1	Country	Manufacturer
G1	First Name	Manufacturer
G1	Postal Code	Manufacturer
G1	State	Manufacturer
G2	Phone #	Manufacturer
G3	Consumer	Manufacturer
G3	Foreign	Manufacturer
G3	Distributor	Manufacturer
G3	Literature	Manufacturer

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
G3	Other	Manufacturer
G3	Professional	Manufacturer
G3	Representative	Manufacturer
G3	Study	Manufacturer
G3	User Facility	Manufacturer
G4	PI Received	Manufacturer
G5	(A)NDA #	Manufacturer
G5	IND #	Manufacturer
G5	OTC Product	Manufacturer
G5	Pre-1938	Manufacturer
G6	Protocol #	More Info (Product Issues) and Manufacturer
G7	10-day	Manufacturer
G7	15-day	Manufacturer
G7	5-day	Manufacturer
G7	Follow-up	Manufacturer
G7	Follow-Up #	Manufacturer
G7	Initial	Manufacturer
G7	Periodic	Manufacturer

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
G8	AE Terms	Manufacturer
G9	Mfg Report #	Manufacturer
H1	Death	Investigation
H1	Malfunction	Investigation
H1	Other	Investigation
H1	Serious Injury	Investigation
H2	Additional Information	Investigation
H2	Correction	Investigation
H2	Device Evaluation	Investigation
H2	Response to FDA Request	Investigation
H3	Evaluated by Mfg	Investigation
H3	Evaluation	Investigation MDV
H3	Non-Evaluation Codes	Investigation
H4	Mfg Date	Investigation More Info (Products)
H5	Labeled Single Use	More Info (Products) Investigation

Location on MedWatch Form 3500A	Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen
H6	Conclusion Codes	Investigation
H6	Method Codes	Investigation
H6	Result Codes	Investigation
H7	Inspection	Investigation
H7	Modification	Investigation
H7	Notification	Investigation
H7	Other	Investigation
H7	Patient Monitoring	Investigation
H7	Recall	Investigation
H7	Relabeling	Investigation
H7	Repair	Investigation
H7	Replace	Investigation
H8	Usage of Device	Investigation
H9	Correction #	Investigation
H10	Mfg Narrative	Investigation MDV
H11	Corrected Data	Investigation

Field Mapping for the MDV Report

The following table shows how the fields in the Regulatory Reports screen map to the fields in the MDV report.

Regulatory Reports Screen	UI Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen	Text on MDV Report
Report Header	Report # MDV Report #	More Info MDV	MDV Report #
Report Header	Affiliate Ref #	MDV	Affiliate Ref #
Report Header	Type	More Info	Report Type
MDV Determination	Determination	MDV	MDV Determination
Destination	Authorities	MDV	Competent Authority Name
Destination	Address Address 2 City State Postal Code Country	MDV	Address
General	Report Date	More Info, Regulatory Reports screen only	Report Date
General	Received	More Info	Manufacturer Awareness Date
General	Affiliate Acct	MDV	Reporting Firm Name
General	Auth Rep First Name	MDV	Authorized Representative
General	Address City State	MDV	Address

Regulatory Reports Screen	UI Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen	Text on MDV Report
	Postal Code Country		
General	Phone #	MDV	Telephone
General	Fax #	MDV	Facsimile
Event Information	Patient Identifier	Patient	Patient Identifier
Event Information	Gender	Patient	Gender
Event Information	Age	Patient	Age
Event Information	Weight	Patient	Weight
Event Information	Date of Birth	Patient	Date of Birth
Event Information	Account	More Info	Health Care Facility Name
Event Information	Site	More Info	Site
Event Information	Contacts, First Name	More Info	Contact Name
Event Information	Address	More Info	Address
Event Information	Phone #	More Info	Contact Phone Number
Event Information	Event Date	More Info (Event Detail)	Event Date
Event Information	Description	More Info (Event Detail)	Event Description
Event Information	# Occurrences	More Info (Event Detail)	Number of Occurrences
Event Information	Labeled Single Use	More Info (Products) Investigation	Device Labeled for Single Use
Event Information	Patient Codes	MDV Importer	Patient Outcomes
Event Information	Device Codes	MDV	Device Outcomes

Regulatory Reports Screen	UI Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen	Text on MDV Report
		Importer	
Event Information	Usage of Device	MDV Investigation	Usage of Device
Event Information	Authorities	MDV	Competent Authorities Already Notified
Device Information	Mfg Name	MDV	Manufacturer Name
Device Information	Contact First Name	MDV	Manufacturer Contact Name
Device Information	Address City State Postal Code Country	MDV	Address
Device Information	Phone #	MDV	Telephone
Device Information	Fax #	MDV	Facsimile
Device Information	Product	More Info (Products)	Device Name
Device Information	Device Type	More Info (Products)	Type of Device
Device Information	Lot #	More Info (Products)	Device Lot #
Device Information	Part #	More Info (Products)	Device Part #
Device Information	Asset #	More Info (Products)	Device Asset #
Device Information	Serial #	More Info (Products)	Device Serial #
Device Information	Model #	More Info (Products)	Model #
Device Information	Catalog #	More Info (Products)	Catalog #

Regulatory Reports Screen	UI Field Name	View (Applet) on the Regulatory Reports and the Product Issues screen	Text on MDV Report
Device Information	Approval Org	MDV	Device Approval Body
Device Information	Approval #	MDV	Approval #
Device Information	Qty Involved	More Info (Products)	Quantity of Devices Involved
Device Information	Device Available	More Info (Products)	Device Disposition
Device Information	External Products	More Info (Event Detail)	Associated Products
Results of Investigation	Evaluation	MDV Investigation	Device Evaluation Result
Results of Investigation	Remedials	MDV	Remedial Action
Results of Investigation	MFG Narrative	MDV Investigation	Manufacturer's Narrative

About Configuring Buttons in Regulatory Reports

There are three buttons associated with regulatory reports. You can configure the workflows for these buttons.

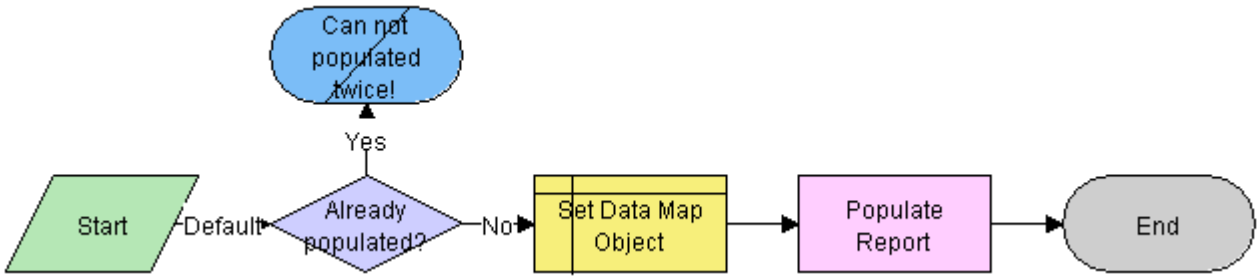
- Populate Report button (*LS Medical Product Issue Populate Report Workflow*)
- Generate (*LS Medical Product Issue RR Submit Workflow*)
- Reopen (*LS Medical Product Issue RR Reopen Workflow*)

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

LS Medical Product Issue Populate Report Workflow

This workflow is initiated from the Populate button on the Regulatory Reports view of the Product Issues screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Checks if current record has already been populated. If it has, the workflow ends.
2. Sets the data map object according to the report type.

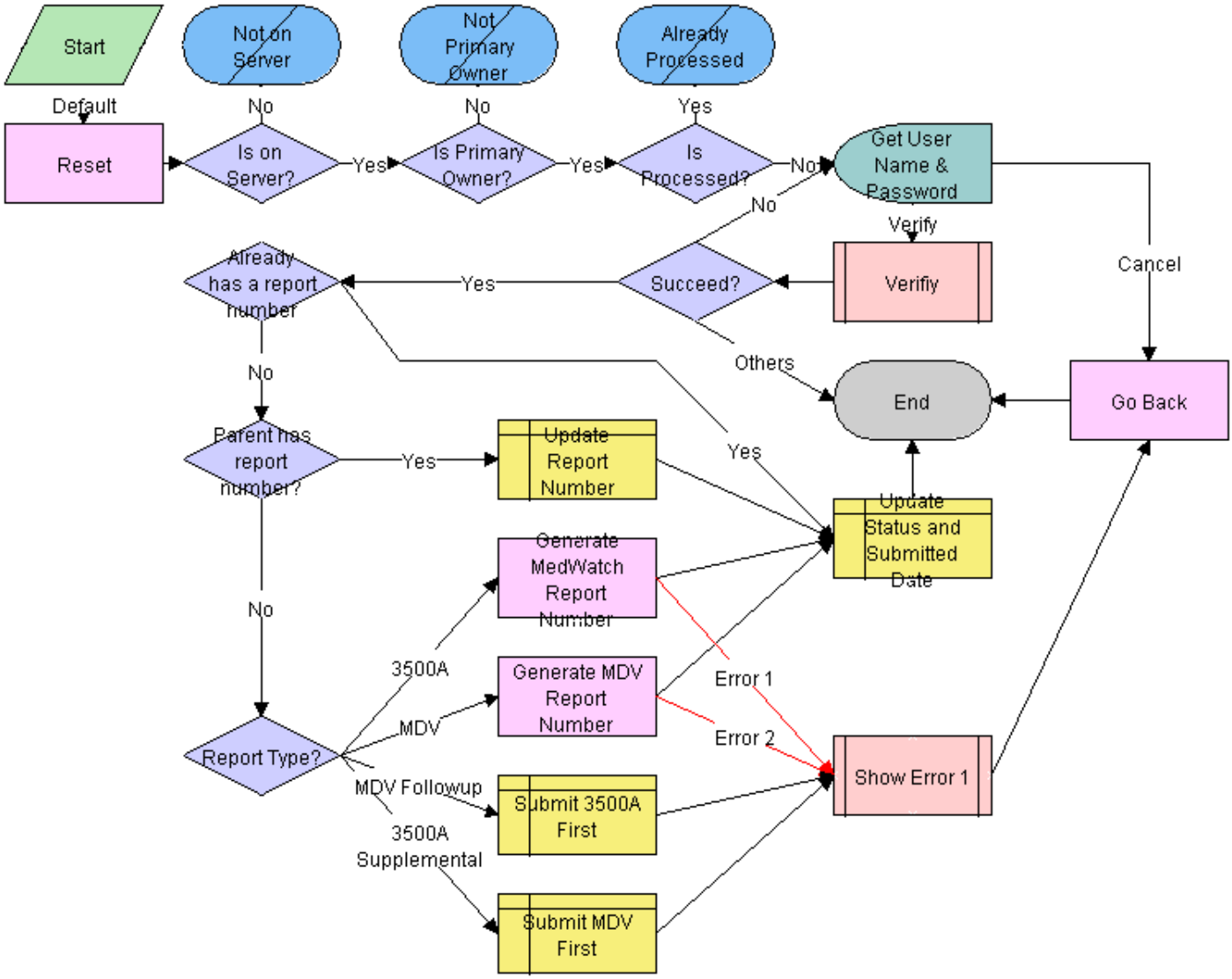
   The data map objects are:

   - LS Medical PI Populate Report - 3500A
   - LS Medical PI Populate Report - 3500 Supplemental
   - LS Medical PI Populate Report - MDV Initial
   - LS Medical PI Populate Report - MDV Follow-up
3. Populates the report from the product issue according to the data map object.

LS Medical Product Issue RR Submit Workflow

This workflow is initiated from the Generate button on the Regulatory Reports screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

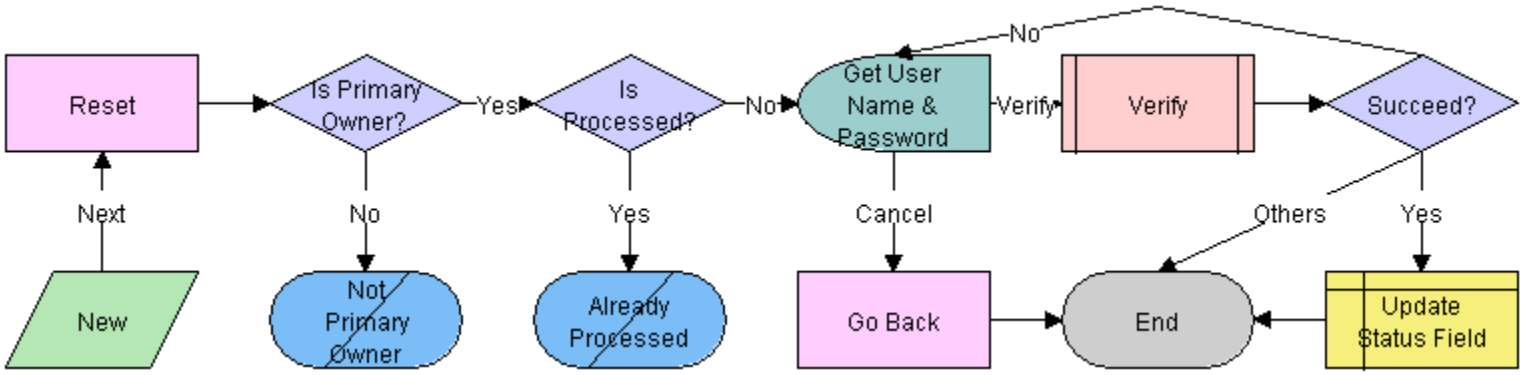
1. Checks if the application is running on a server database. If not, the workflow ends.
2. Checks if the user is the primary owner. If not, the workflow ends.
3. Checks if the record has already been processed. If it has, the workflow ends.
4. Calls the LS Medical User Verification workflow. If the authentication does not pass, the workflow ends.
5. Checks if the parent product issue already has a report number, as follows:
    - If the product issue has a report record with a report number and the Report Type is - (empty), then use the same number for the report being submitted.
    - If the product issue does not have a report record with a report number and the Report Type is 3500A or MDV, then generate a new report number.
    - If the product issue does not have a report record with a report number and the Report Type is 3500A Supplemental or MDV Follow-up, then the workflow ends.

6. Sets the status of the report to Submitted.

LS Medical Product Issue RR Reopen Workflow

This workflow is initiated from the Reopen button on the Regulatory Reports screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Checks if the user is the primary owner. If not, the workflow ends.
2. Checks if the record has already been processed. If it has, the workflow ends.
3. Calls the LS Medical User Verification workflow. If the authentication does not pass, the workflow ends.
4. Sets the status of the report to Reopen.

24 Communicating with Customers for Adverse Events and Complaints Management

Communicating with Customers for Adverse Events and Complaints Management

This chapter covers the following topics:

- *About Communicating with Customers for Adverse Events and Complaints Management*
- *Scenario for Customer Communication*
- *Process of Customer Communication for Adverse Events and Complaints Management*

About Communicating with Customers for Adverse Events and Complaints Management

This chapter describes ways to communicate with the customers and coworkers about an adverse event or complaint. If you have installed the Siebel Document Server, you can create documents such as letters, reports, and presentations from within the Siebel Medical application.

Where to Find More Information

The following chapters describe other aspects of the complaints and adverse events management process:

- *Capturing Adverse Events and Complaints*
- *Investigating Adverse Events and Complaints*
- *Recording Product Analysis for Adverse Events and Complaints Management*
- *Managing Corrective and Preventative Actions*
- *Regulatory Reporting*
- *Closing Adverse Events and Complaints*

Scenario for Customer Communication

This scenario is an example process performed by the Siebel administrator and the quality manager. Your company might follow a different process according to its business requirements.

This scenario is designed to illustrate the functionality of the Siebel AECM.

The Siebel Administrator

The administrator sets up the Document Server and the Proposals, Presentations, and Correspondence templates that the quality manager uses to create customized reports, letters, and presentations. The administrator works closely with the quality manager who provides the text for the templates.

The Quality Manager

The quality manager is the owner of the complaint investigation about a faulty cartridge in a blood analyzer system. The investigation is coming to a close: the product analysis has been completed and a corrective action has been logged.

The quality manager has been assigned two activities:

- To communicate the status of the product issue with the customer who made the initial complaint
- To give a short presentation about the product issue at the CAPA team's weekly meeting

To Brief the Customer

The quality manager prepares two sets of documents. First, she generates a report. The report takes a standard template for product issue reports and automatically incorporates data from the product issue into the report. She reviews the report in MS Word, making edits and changes as necessary.

There are five contacts associated with the account that made the initial complaint. As a courtesy, the quality manager wants to send each of them a copy of the report. She uses the Correspondence feature to generate five personalized cover letters to be mailed with the report.

To Present Data to Colleagues

The quality manager is routinely asked to present information about various product issues at the weekly CAPA meeting. The administrator has prepared a Power Point template which she uses to generate a standard product issue presentation, incorporating specific data from the selected product issue.

Conclusion

After mailing the report packages to the customer contacts and delivering her presentation at the CAPA meeting, the quality manager changes the status of her two activities to Closed.

Process of Customer Communication for Adverse Events and Complaints Management

This example process represents the tasks that are carried out in the *Scenario for Customer Communication*. Your company might follow a different process according to its business requirements.

Administrator Procedures

- *Setting Up Proposals, Correspondence, and Presentations*

End-User Procedures

- *Communicating about Product Issues Using Proposals*
- *Communicating about Product Issues Using Correspondence*
- *Communicating about Product Issues Using Presentations*

Setting Up Proposals, Correspondence, and Presentations

Siebel Proposals, Correspondence, and Presentations allow your employees to create documents based on templates that you create in Microsoft Office.

This task is a step in *Process of Customer Communication for Adverse Events and Complaints Management*.

To set up proposals, correspondence, and presentations

1. Install the Document Server.
2. Install the correct version of Microsoft Office.
3. Create field mappings.
4. For proposals and correspondence, create template files in Microsoft Word.
5. For presentations, create template files in Microsoft PowerPoint.
6. Add the templates to the Siebel Business Application.
    - **Proposal.** For Proposal templates, set the category field to Product Issue Proposal.
    - **Presentation.** For Presentation templates, set the category field to Product Issue Presentation.

For information on setting up proposals, correspondence, and presentations, see *Siebel Correspondence, Proposals, and Presentations Guide* .

Communicating about Product Issues Using Proposals

During the course of an investigation, the quality manager might need to create reports containing information about the product issue.

Such reports, as Microsoft Word files, can be generated automatically, incorporating fields from the selected product issue. Predefined product issue proposal templates are set up by the administrator. End users can edit the generated report file in MS Word.

This task is a step in *Process of Customer Communication for Adverse Events and Complaints Management*.

To create a Microsoft Word report for a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. Drill down on a product issue.
3. Click the Proposals tab.

    For information about creating proposals, see *Siebel Correspondence, Proposals, and Presentations Guide* .

Communicating about Product Issues Using Correspondence

During the course of an investigation, the quality manager might want to send letters to the contacts associated with the product issue.

The Correspondence feature is used to generate MS Word files (typically letters) where the file is personalized for each contact. That is, information about the contact (name, address, and so on) is incorporated into the letter.

Information about the product issue cannot be incorporated using Correspondence. Use the Proposals feature to incorporate information about the product issue. Predefined correspondence templates are set up by the administrator. End users can edit the generated files in MS Word.

This task is a step in *Process of Customer Communication for Adverse Events and Complaints Management*.

To create a Microsoft Word correspondence

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue.
3. Click the Contacts tab.
4. Select the contacts to whom you want to send correspondence.
5. From the application-level menu, select File, then Send Letter menu item.

   The Correspondence screen appears.

   For information about creating correspondence, see *Siebel Correspondence, Proposals, and Presentations Guide* .

Communicating about Product Issues Using Presentations

During the course of an investigation, the quality manager might need to present information about the product issue.

Microsoft PowerPoint presentations can be generated automatically, incorporating fields from the selected product issue. Predefined product issue presentation templates are set up by the administrator. End users can edit the generated presentation file in MS PowerPoint.

This task is a step in *Process of Customer Communication for Adverse Events and Complaints Management*.

To create a Microsoft Power Point presentation for a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue.
3. Click the Presentations tab.

   For information about creating proposals, see *Siebel Correspondence, Proposals, and Presentations Guide* .

25 Closing Adverse Events and Complaints

Closing Adverse Events and Complaints

This chapter covers the following topics:

- *About Closing Adverse Events and Complaints*
- *Scenario for Closing Adverse Events and Complaints*
- *Process of Closure for Adverse Events and Complaints Management*
- *About Configuring Close and Reopen Buttons for Product Issues*

About Closing Adverse Events and Complaints

This chapter describes the closing of a product issue.

A product issue has come to a conclusion and no new activity or information is anticipated: quality manager closes the product issue record.

When the status of a product issue is changed to Closed, many of the fields in the product issue record become read-only or are locked down to maintain data integrity.

Where to Find More Information

The following chapters describe other aspects of the complaints and adverse events management process:

- *Capturing Adverse Events and Complaints*
- *Investigating Adverse Events and Complaints*
- *Recording Product Analysis for Adverse Events and Complaints Management*
- *Managing Corrective and Preventative Actions*
- *Regulatory Reporting*
- *Communicating with Customers for Adverse Events and Complaints Management*

Scenario for Closing Adverse Events and Complaints

This scenario is an example process performed by the quality manager. Your company might follow a different process according to its business requirements.

This scenario is designed to illustrate the functionality of Siebel AECM.

The Quality Manager

In the course of this scenario, the quality manager closes the product issue, reopens it, reviews its history and finally closes it for good.

Closing

A product issue is ready for closure when:

- The activities associated with the product issue have been completed and closed.
- Product analysis has been carried out.
- The product issue was assessed as reportable and the report sent to the regulatory agency.
- The customer has been informed about the status of the product issue.
- A CAPA record has been created.

The quality manager, who is the owner of the product issue, changes the status of the product issue to closed.

Reopening

Some months later, new information resulting from the CAPA work is reported. A new quality manager needs to reopen and revise the product issue based on this new information.

Reviewing History

The new quality manager acquaints himself with the product issue.

He reviews the approval history for the issue, noting who approved the initial product issue review, and who approved the closure.

He also reviews the lockdown fields. This tells him that the name of the account has changed since the product issue was closed.

After updating the fields, the quality manager uses audit trail to review all changes that were made to product issue since reopening. Then he closes the product issue.

Process of Closure for Adverse Events and Complaints Management

This example process represents the tasks that are carried out in the *Scenario for Closing Adverse Events and Complaints*. Your company might follow a different process according to its business requirements.

End-User Procedures

- *Closing Product Issues*
- *Reopening Product Issues*
- *Reviewing Approvals for Product Issues*

- *Reviewing Lockdown Fields*
- *Reviewing Changes Made to Fields*

Closing Product Issues

When the status of the product issue is changed to closed, the LS Medical Product Issue Close workflow:

- Does a user authentication
- Locks down the following fields: Asset #, Serial #, Lot #, Manufacture Date, Manufacture Name, Street Address, City, State, Postal Code, and Country.
- Makes all fields read-only

For more information about the workflow, see *About Configuring Close and Reopen Buttons for Product Issues*.

This task is a step in *Process of Closure for Adverse Events and Complaints Management*.

To close a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, select a product issue record.
3. Click Close.
4. Complete user authentication.

Reopening Product Issues

Reopening a product issue reverses the effects of the Review Complaint and Close buttons.

When the status of the product issue is changed to Reopen, the LS Medical Product Issue Reopen workflow:

- Authenticates the user's login and password
- Makes read-only fields editable

For more information about the workflow, see *About Configuring Close and Reopen Buttons for Product Issues*.

> **Tip:** When a product issue is reopened and then closed again, all locked down fields are overwritten with new information: To keep the track of the changes, turn on Audit Trail for the lockdown fields.

This task is a step in *Process of Closure for Adverse Events and Complaints Management*.

To reopen a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, select a product issue record.
3. Click Reopen.

Reviewing Approvals for Product Issues

Any change to the Status field for the product issue record is recorded in the Approvals view. Use the Approvals view to see who has changed that status of the product issue and when the change was made.

To use approval tracking, you must have Audit Trail turned on. For information about Audit Trail, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Closure for Adverse Events and Complaints Management*.

To view approvals for a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue record.
3. Click the Approvals tab.

   In the read-only list, you can view all approvals to the product issue.

Reviewing Lockdown Fields

For most purposes, you want your product issue data to contain the up-to-date information. For example, if an account has changed its name, you want have its current name appear in all product issues records so that a query for the current name returns the complete set of product issues associated with the account, both before and after the name change.

However, for record keeping, you might also want to maintain some relational data exactly as it was when the product issue was closed. For example, after the product issue was closed, Dana Frederick changes her name to Dana Feldman. Her new name was updated through the Contacts screen, and this change is reflected in the current product issue record. However, the Lockdown view for the product issue shows Dana's name when product issue was closed. (See the following figure.)

The application should be configured so that the fields appropriate for your business processes are locked down. In the preconfigured application, some fields are locked down at review complete and others are locked down when the product issue is closed.

This task is a step in *Process of Closure for Adverse Events and Complaints Management*.

To review lockdown fields for a product issue

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue record.
3. Click the Lockdown tab.

   Lockdown fields show the field values as they were when the product issue was closed.

Note: For multivalue fields, only the primary value is locked down.

Reviewing Changes Made to Fields

Using the Audit Trail view, quality managers and other users can see changes made to various fields in the product issue record.

Many fields are set to be audited in the preconfigured application. You can configure the application to audit more or fewer fields. For more information about enabling the audit trail function, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Closure for Adverse Events and Complaints Management*.

To review changes made to product issue fields

1. Navigate to Product Issues screen, then the Product Issue List view.
2. In the Product Issue List, drill down on a product issue record.
3. Click the Audit Trail tab.
4. Review records in the Audit Trail list.

About Configuring Close and Reopen Buttons for Product Issues

There are two buttons associated with closing a product issue. You can configure the workflows for these buttons.

- Close button

  For more information, see *Close Complaint Workflow*.
- Reopen button

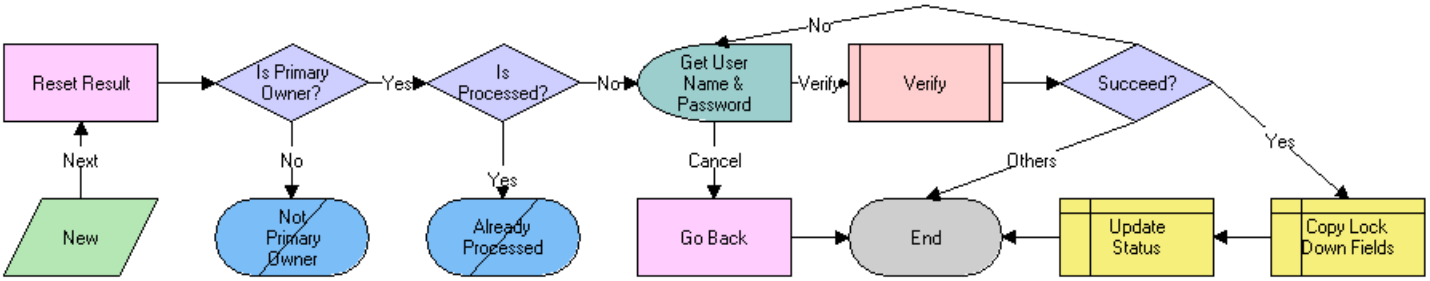
  For more information, see *Reopen Complaint Workflow*.

You can modify workflows to suit your own business model using Siebel Business Process Designer. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Close Complaint Workflow

This workflow (LS Medical Product Issue Close) is initiated from the Close button on the Product Issues screen.

The workflow appears in the following figure.



Workflow Description

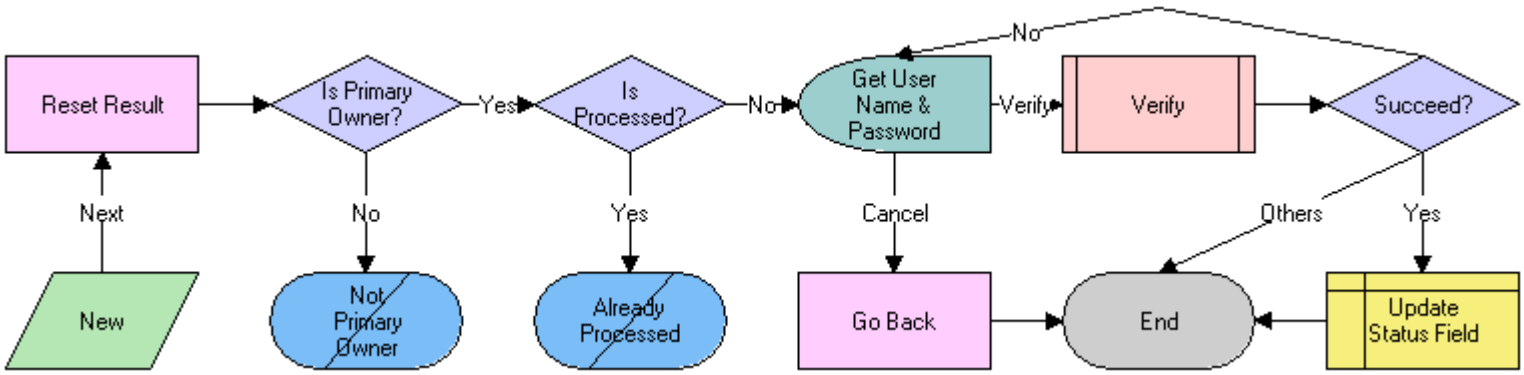
This workflow performs the following actions:

1. Checks if the user is the primary owner of the product issue.
2. If the user is not the primary owner, shows an error dialog box and ends.
3. Checks if the product issue has already been processed.
4. If the product issue has already been processed, shows an error dialog box appears and ends.
5. Calls the User Verification workflow.
6. If the user authentication is successful, copies the lockdown fields and changes the status to Closed.

Reopen Complaint Workflow

This workflow (LS Medical Product Issue Reopen) is initiated from the Reopen button on the Product Issues screen.

The workflow appears in the following figure.



Workflow Description

This workflow performs the following actions:

1. Checks if the user is the primary owner of the product issue.
2. If the user is not the primary owner, shows an error dialog box and ends.
3. Checks if the product issue has already been processed.
4. If the product issue has already been processed, shows an error dialog box appears and ends.
5. Calls the User Verification workflow.
6. If the user authentication is successful, changes the status to Reopen and makes the read-only field editable.

26 Using Personalizing Content Delivery

Using Personalizing Content Delivery

This chapter describes how to use Siebel Personalized Content Delivery (PCD). It includes the following topics:

- *About Personalized Content Delivery*
- *Defining System Preferences for Personalized Content Delivery*
- *Managing Content for Personalized Content Delivery*
- *Working with Messaging Plans*
- *Accessing and Delivering Messaging Plans Using the PCD Viewer*
- *Using Signature Control for Personalized Content Delivery*

About Personalized Content Delivery

Personalized Content Delivery enables companies to deliver presentations that are tailored to meet customer needs using multimedia content. It allows sales teams to deliver the right message to the right customer at the right time. Personalized Content Delivery enables sales representatives to optimize each selling opportunity, resulting in improved customer acquisition, satisfaction, and retention.

Sales representatives can use Personalized Content Delivery to convey product messages to their customers during a face-to-face sales call. Personalized Content Delivery is integrated into the call-reporting process for Siebel Pharma allowing sales representatives to:

- Present key messages and related information
- Capture responses
- Conduct assessments of the messages delivered
- Capture signature for samples

Personalized Content Delivery automatically tracks all the interactions and the content presented.

Defining System Preferences for Personalized Content Delivery

Your system administrator must define the following system preferences before you can begin to use Personalized Content Delivery.

- **Server Uncompression Location.** Specifies the Siebel Server file path location from where uncompressed message files are cached.

- **Decompressed Files Path.** Specifies the relative path to cache uncompressed message files when using Siebel Mobile Web Client.
- **CheckForNeedToSync.** For remote users, only messages with the user property, NeedToSync, set to Y are decompressed. Otherwise, all messages are decompressed.

For more information about setting system preferences, see *Setting the Server Uncompression Location and Other System Preferences*. The table in the topic *Setting the Server Uncompression Location and Other System Preferences* lists the system preference that you must set before you start using Personalized Content Delivery.

Managing Content for Personalized Content Delivery

Siebel Literature allows you to give your users access to sales and marketing literature, such as product brochures, white papers, data sheets, multimedia presentations, interactive presentations, and other types of literature items. For information about literature, see *Siebel Applications Administration Guide* .

Personalized Content Delivery uses the content loaded in to the Siebel database. This content is defined as a literature item and the literature type is set to Message. The process for managing Personalized Content Delivery content is as follows:

- Create new content using content creation tools
- Obtain Legal and Marketing approval for the content
- Load the content into the Siebel Business Application
- Verify the content
- Provide access to content users who create messaging plans

This topic contains the following information:

- *Personalized Content Delivery Support for Content File Formats*
- *Loading Content for Personalized Content Delivery Usage*
- *Associating Attributes with Personalized Content Delivery Records*
- *Adding Component Files to Personalized Content Delivery Content*
- *Providing Access to Personalized Content Delivery Content*

Personalized Content Delivery Support for Content File Formats

Users can create content using a number of third-party content creation tools. The following file types are among the most common:

- Portable Network Graphics (PNG)
- Graphics Interchange Format (GIF)
- Photographic Experts Group (JPEG and JPG)

> **Note:** You can enable support for additional file formats such as Bitmap (BMP), Abode Acrobat (PDF), Word (DOC), PowerPoint (PPT and/or PPS), and Excel (XLS) by editing the IsSupportedFormat calculated field. However, these file formats are not recommended for creating content. In order to view a document in Personalized Content Delivery, your computer must have the document's native application installed. For example, if you are trying to view a Microsoft Word 2000 document (.doc), Microsoft Word 2000 must reside on your computer.

For more information about the calculated fields for the Personalized Content Delivery business components, see *PCD Business Component Calculated Fields*.

Loading Content for Personalized Content Delivery Usage

You must create content before you can load it in your Siebel database. You can create the content using a content creation tool. After you have created a content file, create a literature record in the Siebel database to make the file available to users of Siebel Business Applications. In the Literature record, set the Literature Type field to Message to differentiate the content available to users in Personalized Content Delivery from other document files loaded and managed in the Literature view.

Creating a Literature Record

The following procedure shows you how to create a literature record.

To create a literature record

1. Navigate to the Administration - Document screen, then the Literature view.
2. In the Literature list, create a new record and complete the necessary fields.
   - Click New File.
   - Browse to and select a file from your local drive, and then click Open.

     The name of the file attachment appears in the Name and File Name fields. The new record is added to the Literature list. Some information appears in the Literature list and other information in the More Info view.
   - Enter information for the new record in the Literature list and the More Info view as required. Some fields are described in the following table.

View	Field	Description
Literature List	Name	Enter the name of the literature record. It is recommended to remove any dot extension added in the Name field by default when you load the file.
Literature List	File Name	Click Browse and in the Choose File dialog box, select the document file. You can also enter the file name manually.
Literature List	Description	(Optional). Enter a description of the content.
Literature List	Literature Type	Select the type of the literature as Message. You must set this field to Message type, because the Literature Type field is used to filter the literature items that are available in Personalized Content Delivery.
Literature List	Access Level	(Optional). Select the access level for the content.

View	Field	Description
Literature List	Unzip On Download	Select this check box to download zip files and then unzip them so that you will be able to see the zip file items in the PCD Viewer. If not selected, then zip files are downloaded only but not unzipped. In such cases, you will be unable to see the zip file items in the PCD Viewer.
Literature List	Rating	(Optional). Select the rating for the content, if any.
Literature List	Thumbnail Image	(Optional). Click Browse and in the Images dialog box, select the image that you want and click OK. The associated thumbnail image file is used in Personalized Content Delivery Planner.
Literature List	Audience	(Optional). Enter the intended audience for the content.
Literature List	Speaker Notes	(Optional). Enter any Speaker notes for the content.
Literature List	Detail Product	(Optional). Click Browse and in the Pick Product dialog box, select the product name for which this message is created and click OK.
Literature List	Verification Status	Set to default value of Not Verified. After the Administrator verifies that the content can be loaded and displayed in Personalized Content Delivery Viewer, the verification status is set to Success or Failed.
Literature List	Legal Approval Date	(Optional). Select the date the content was approved by Legal.
Literature List	Legal Approval	(Optional). Select if content was approved by Legal.
Literature List	Legal Approver	(Optional). Select the Legal approver of the content.
Literature List	Marketing Approval Date	(Optional). Select the date the content was approved by Marketing.
Literature List	Marketing Approval	(Optional). Select if content was approved by Marketing.

View	Field	Description
Literature List	Marketing Approver	(Optional). Select the Marketing approver of the content.
Literature List	External Author	(Optional). Enter the name of the author of the content.
More Info	Synopsis	(Optional). Enter a brief synopsis of the content.
More Info	Release Date	Select a date after which this content can be used in Personalized Content Delivery. This is required for records of Literature Type equal to Message.
More Info	Expiration Date	Select a date after which this content should not be used in Personalized Content Delivery. This is required for records of Literature Type equal to Message.
More Info	Distribution Method	Select Publish to automatically distribute the content to remote users based on permissions.
More Info	Questionnaire	(Optional). Click Browse and in the Questionnaire dialog box, select the Template Name that you want, and click OK. Sales assessment templates for Messages are created in the Data Administration screen, then the Sales Assessment Templates view, where assessment template type must be set to Message.

Note: Do not associate any Accounts, Competitors, Industries and Products to the content as this action might result in unnecessary distribution of content based on associated visibility.

In addition, do not change Local (Checked), Request (Unchecked), Update File (Checked) and Internal (Checked) fields. If you uncheck Internal, Literature is available as an enclosure in the Correspondence screen, and it is displayed in the Competitive Literature list of the Competitors screen.

Creating a Literature Record and Attaching a Thumbnail Image

The following procedure shows you how to create a literature record in Siebel CRM and attach a thumbnail image to the literature record. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

Note: ZIP files are generally used to upload HTML files and their related content since individual files cannot be attached together.

For more information about working with literature in Siebel CRM, see the chapter about literature administration in *Siebel Applications Administration Guide* .

To create a literature record and attach a thumbnail image in Siebel CRM

1. Log in to the Siebel business application.
2. Navigate to the Administration - Document screen, then the Literature view.
3. In the Literature list, create a new literature record of type Message and complete the necessary fields.
    a. Click New File.
    b. Browse to and select a file from your local drive, and then click Open.

       The name of the file attachment appears in the Name and File Name fields.
    c. Enter a description of the file in the Description field.

       For example, enter HTML if this is an HTML ZIP file.
    d. In the Literature Type field, select Message.
    e. Enter the Release Date and the Expiration Date in the appropriate fields.

       The release date must be less than today's date and the expiration date must be greater than today's date.
    f. Select the Unzip On Download check box to download zip files and then unzip them so that you will be able to see the zip file items in the PCD Viewer.

       If the Unzip On Download check box is not selected, then zip files are downloaded only but not unzipped. In such cases, you will be unable to see the zip file items in the PCD Viewer.

       > **Note:** This step applies to offline applications only (for example, Siebel Mobile disconnected applications).

    g. Step off the record to save it.
4. In the Literature list, create a new literature record of type Thumbnail Image and complete the necessary fields.
    a. Click New File.
    b. Browse to and select a file from your local drive, and then click Open.

       The name of the file attachment appears in the Name and File Name fields.
    c. Enter a description of the file in the Description field.
    d. In the Literature Type field, select Thumbnail Image.
    e. The release and expiration dates are not required.
    f. Step off the record to save it.
5. Attach a thumbnail image to a literature record as follows:
    a. Create two literature records, one of type Message and the other of type Thumbnail Image as shown in Step 3 and Step 4.
    b. Query for the literature record of type Message where you want to attach the thumbnail image.
    c. In the Thumbnail Image field, select the image that you want to attach, and then click OK.
    d. Step off the record to save the changes.

Associating Attributes with Personalized Content Delivery Records

You can associate attributes such as product name, segment, and so on with the PCD records, so that users can filter records based on the specified values.

To associate attributes with PCD records

1. Navigate to the Administration - Document screen, then the Literature view.
2. In the Literature list, select a record.
3. Click the Applies To tab.
4. In the Applies To list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Description
Product	Select the product that you want to apply to the message.
Indication	Use the drop-down list to select the indication for which the message was designed.
Issues	Use the drop-down list to select the issue that the message was designed to address.

Adding Component Files to Personalized Content Delivery Content

You might want to add additional component files to the PCD content. For example, the message might be composed of one or more files, such as logos, help text, and translation files. Other component files might contain dynamic content to promote content reuse.

Adding component files to PCD content

1. Navigate to the Administration - Document screen, then the Literature view.
2. In the Literature list, select a record,
3. Click the Component Files tab.

4. In the Component Files list, create a new record and complete the necessary fields.

   You must select a component file from the dialog box that appears, and then click OK. Some fields are described in the following table.

Field	Description
Description	Enter a description of the component file.
Literature Type	Use the drop-down list to select a literature type for this component file.
Subtype	Use the drop-down list to select a subtype. For example, Message, Video, Document, Clinical Reprint, Case Study and so on.
Relationship Type	Use the drop-down list to select the relationship type (or example, Help, Component File, Translation File, Logos, and so on) for the file in relation to the message.

Note: You can add only one help file to each PCD content record. In PCD Viewer, click the Help button to display the help component file associated with the message being presented.

Providing Access to Personalized Content Delivery Content

PCD content can be made accessible to brand managers and sales operation managers by adding appropriate categories to the Literature record. You can create private categories for users you want to have access to the content by associating the categories to the PCD content.

For more information about access groups, see *Siebel Security Guide* .

To add category information for PCD content

1. Navigate to the Administration - Document screen, then the Literature view.
2. In the Literature list, select a record.
3. Click the Category tab.
4. In the Category list, add a new category record and complete the necessary fields.

   You must select a category from the dialog box that appears, and then click OK.
5. Drill down on the Catalog Name of the new record and select the Private check box in order to restrict visibility and to route the PCD content to the selected users.

Working with Messaging Plans

Messaging plans combine a number of messages in a specific sequence. For example, a presentation that comprises of a number of slides are displayed in a specific sequence. Messaging plans are created by brand managers, product managers, and sales operation managers. You can associate messaging plans with objectives for a sales representative. You can also associate messaging plans with marketing communications (Contact Call Offers) directed at a contact.

A high level process of messaging plans is as follows:

- Create, update and revise messaging plans
- Preview messaging plan
- Release messaging plan
- Provide sales representatives access to messaging plans
- Associate messaging plans to Objectives and Marketing Communications Offers

This topic contains the following information:

- *Creating Messaging Plans*
- *Updating Messaging Plans*
- *Defining Access to, Releasing, and Revising Messaging Plans*
- *Associating Help With Messaging Plans*
- *Associating a Messaging Plan with an Objective*
- *Associating a Messaging Plan with Contact Call Offers*
- *Personalizing Messaging Plans*
- *Accessing and Delivering Messaging Plans Using the PCD Viewer*
  - *Showing Presentations Using the PCD Viewer*
  - *Recording Responses to Presentations*
  - *Decompressing PCD Content*
  - *PCD Viewer APIs*

Creating Messaging Plans

After you have verified the approved PCD content and made it accessible to select users by adding appropriate private categories to the Literature record, you must create a messaging plan that can be distributed to the various sales representatives. The sales representative can use these messaging plans during their face to face calls with targeted customers.

To create a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan List, create a new messaging plan and complete the necessary fields.
   For example, complete the following fields on the form that appears:
   a. Enter a name for the new messaging plan in the Name field.

b. Select a product in the Products field.

   The product that you select must be associated with the user, otherwise the messaging plan will not be visible to the user.

c. Complete the remaining fields on the form as required:

   - **Disable Menu Bar.** Select this check box to disable the header navigation bar in the PCD Viewer. For more information about navigating the PCD Viewer, see *Showing Presentations Using the PCD Viewer*.
   - **Disable Navigation Bar.** Select this check box to disable the Next and Previous arrows and the footer navigation bar in the PCD Viewer. For more information about navigating the PCD Viewer, see *Showing Presentations Using the PCD Viewer*.
   - **Enable Direct Launch.** Select this check box to enable presentations to be started from any presentation item. In this case, the presentation will start showing in the PCD Viewer with the selected item and you must navigate back to see any preceding items in the presentation. For more information about navigating the PCD Viewer, see *Showing Presentations Using the PCD Viewer*.
   - **Disable Response.** Select this check box to make the logging of customer feedback to presentations optional. To enforce the mandatory logging of customer feedback, then do not select this check box. For more information about capturing customer feedback, see *Recording Responses to Presentations*.
   - **Allow Personalization.** Select this check box if you want the messaging plan to appear in the Personalized Plan list, from where you will be able to personalize the messaging plan. For more information about personalizing messaging plans, see *Personalizing Messaging Plans*.

3. Save the new messaging plan record.

Updating Messaging Plans

When you have created your messaging plan, you can configure it to suit your specific requirements. In the Messaging Plans screen, Messaging Plan List view, you can drill down on a messaging plan to show the Messaging Plan Detail view from where you can do the following:

- Associate literature with messaging plans. This involves adding presentation items to messaging plans and then related messages to presentation items as required.
- Sequence the information in the messaging plan to suit a particular presentation.
- Associate any related messages and detailed messages with the messaging plan.
- Go to the Assess Group tab to control access of the messaging plans, the related data, and component files.
- Go to the Help File tab to add help text to your messaging plan to aid in the presentation of your message.

The following procedure shows you how to associate literature (presentation items and related messages) with messaging plans and update the presentation details for messaging plans.

To update messaging plans

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan List, select a record.

   If required, create a new messaging plan as shown in the following.

3. Add presentation items to the messaging plan as follows:

   a. Drill down on the messaging plan Name field and then click the Presentation Items tab.

b. Create a new record for each presentation item that you want to add and complete the necessary fields.

Some fields are described in the following table.

Field	Description
Sequence #	Shows the sequence number for this presentation item. Enter an integer value in to this field to indicate the order where you want the presentation item to appear in the presentation (1 indicates first, 2 indicates second, 3 indicates third position, and so on)
Name	Shows the name for the literature record. Select a message in the Name field.
Display Name	When a messaging plan is selected in the PCD Viewer, its presentation items are displayed as tabs. The name appearing on these tabs depends on the value in this Display Name field. You can enter a display name of your choice. The default value is equal to the Name field value.
Status	Use the drop-down list to select a Show or Hide status for this presentation item. - If Status is set to Show, then the presentation item is visible (or available) when delivering the presentation in the PCD Viewer. - If Status is set to Hide, then the presentation item is hidden (or unavailable) when delivering the presentation in the PCD Viewer. - If personalizing the messaging plan and Status is set to Hide and the Required check box is not selected, then this presentation item is not copied over to the new personalized messaging plan.
Questionnaire	Select the Template Name that you want to add to this presentation item. Sales assessment templates for Messages are created in the Data Administration screen, then the Sales Assessment Templates view, where assessment template type must be set to Message.
Synopsis	Enter a brief description for the presentation item.
Speaker Notes	Add your notes for this presentation item.
Description	Enter a brief description of the contents for this presentation item.
Type	Display only. Shows the literature sub type field in Literature list applet in the Administration - Document screen, then the Literature view.
Rating	Use the drop-down list to select a rating for this presentation item.
Audience	Enter the type of user for which the content is targeted.

Field	Description
Required	Select this check box if you want this presentation item to be visible in the PCD Viewer always (even if the Status field on this presentation item is set to Hide). Deselect this check box if you want to be able to show or hide as required this presentation item in the PCD Viewer using the Status field.
Content	If the literature that you want to associate with the messaging plan is in ZIP file format, then you must complete this field as follows: - Type in the name of the HTML file to show in the PCD Viewer. If you do not specify a file name, then the ZIP file's index.html file is shown by default.
Thumbnail Image File	If the literature that you want to associate with the messaging plan is in ZIP file format, then you must complete this field as follows: - Type in the name of the thumbnail image to show in the PCD Viewer. The image must be present in the HTML ZIP file.

4. Add related messages to presentation items as follows:
   a. Select a record in the Messaging Plan list and drill down on the Name field.
   b. Click the Presentation Items tab and then select the presentation item to which you want to add related messages.
   c. Create a new record for each related message you want to add and complete the necessary fields.
      - Select a message in the Name field. Note that in the case of a hot spot, type the name of the file from the ZIP file in to the Name field. For example: Page10.html in xyz.zip.
      - If the message is in a ZIP file, then complete the Thumbnail field. To complete the Thumbnail field, type in the name of the thumbnail image to show in the PCD Viewer. Note that the image must be present in the HTML ZIP file.
5. Update the presentation details for a messaging plan as follows:
   a. Select a record in the Messaging Plan list and drill down on the Name field.
   b. Click the Presentation Items tab and update the details for the presentation items as required.
      Some fields are described in the previous table.
   c. Save the record.

Defining Access to, Releasing, and Revising Messaging Plans

When finished associating literature (presentation items and related messages) with messaging plans, you must define access to the messaging plan and then release the messaging plan. If the SADMIN user group is granted access to a messaging plan, then the released messaging plan is visible to Siebel administrators only. Until you define access to a messaging plan using the Access Group tab, the messaging plan will not be visible to any other Siebel user group. After releasing a messaging plan, you can revise it as required. Only released messaging plans are available for detailing in the PCD Viewer.

Providing Access to Messaging Plans

You can control access to the messaging plan, presentation items, related messages, and detailed messages.

To assign access groups to a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan list, select a messaging plan and then drill down on the Name field.
3. Click the Access Group tab.
4. In the Categories list, add a new category record and complete the necessary fields.

   You must choose a catalog on the Add Category dialog box that appears, and then click OK.

   The catalog that you choose must contain the users to whom you want to grant access. If you do not see a suitable catalog, then create a new catalog in Siebel CRM, add user lists to that catalog (make sure that appropriate users have been added to the user lists), and then choose that catalog in the Access Group tab. For more information about defining access control using Catalog administration, see *Siebel Order Management Guide* .

   Some fields are described in the following table.

Field	Description
Category Name	The category name associated with the messaging plan, presentation items, related messages, and detailed messages.
Display Name	The display name for the access group.
Catalog Name	The catalog name used to control access to the messaging plan, presentation items, related messages, and detailed messages.
Description	Enter a description for the access group.
Effective Start Date	Enter the date when the catalog becomes visible to the assigned users.
Effective End Date	Enter the date when the catalog will no longer be visible to the assigned users.

5. To remove an access group, select the category record and then delete the record.
6. Click Refresh Cache to view the recent changes to your messaging plans.
7. Navigate away from the record to save your changes to it.

Releasing a Messaging Plan

You can release a messaging plan if its status is equal to Approved. When you create a new messaging plan, its status is In Progress. The messaging plan must go through the approval process. You must set the status to Submitted and associate a required category with the messaging plan so that approvers have access to the messaging plan.

The approver can then set the status of the messaging plan to either Approved or Rejected. If the status is Approved, then you can release the messaging plan by setting the status to Released and by associating the required category with the messaging plan to make it visible to the required sales representatives.

To release a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan list, select the messaging plan that you want to release.
3. In the Status field, change the status to Released to submit the messaging plan for approval.

   When you create a messaging plan, the status is set to In Progress. You can subsequently change the status to Submitted and then Approved before finally setting the status to Released. After you change the status to Released:
   - The messaging plan release date is automatically set.
   - The expiration date field becomes editable and a required field. That is, you must type a suitable expiration date into the Expiration Date field, otherwise you will not be able to save the messaging plan with a status of Released.
   - The messaging plan is available for detailing. That is, the messaging plan is available in the PCD Viewer to show to customers. Messaging plans that do not have a status of Released are not available in the PCD Viewer to show to customers.
   - The messaging plan is visible to the user groups that have been granted access as shown in the following.

Revising Messaging Plans

You can only revise a messaging plan with status of Released. Revising a messaging plan creates a new copy of the original messaging plan and increments the version number. After you make modifications, the new version of the messaging plan can be released.

You can also specify a Start Date and an Expiry Date for a messaging plan. Release Date, Start Date and Expiry Date control when users with access to a messaging plan can start to use the messaging plan in PCD Viewer during calls with customers.

> **Note:** When you revise a messaging plan, a new version number is created and the revised messaging plan must go through the same approval process before it become active. When the new version is active, the older version does not become inactive.

Two or more versions of a messaging plan can be active simultaneously. A messaging plan is active if the release date is before or is today's date, and is before the expiration date. When you load messaging plans in PCD Viewer, only the highest, active version of a messaging plan is loaded. For more information about loading messaging plans in PCD Viewer, see *Availability of Messaging Plans in the PCD Viewer*.

To revise a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan list, select a messaging plan that has a status of Released.
3. Click Revise.

   A copy of the messaging plan you selected in the previous step is created where only the value in the Version field changes by increasing by one. Note that the Access Group information defined for the messaging plan you selected in the previous step is not copied over to the revised messaging plan.
4. Define access to the (revised) messaging plan as shown in *Providing Access to Messaging Plans*.

5. Release the (revised) messaging plan as shown in *Releasing a Messaging Plan*.

Associating Help With Messaging Plans

You can create help text for your messaging plan.

To associate help text with a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plans view.
2. In the Messaging Plan list, select a record, and drill down on the Name field.
3. Click the Help File tab.
4. In the Presentation Items list, add a new help text record for the messaging plan and complete the necessary fields.

   Some fields are described in the following table.

Field	Description
Name	Enter the name of the help file.
Description	Enter a description of the help file.
Sub Type	Use the drop-down list to select a sub type for the help file.
Literature Type	Use the drop-down list to select a literature type for the help file.

5. To remove a help text record, select the record and then delete the record.

Associating a Messaging Plan with an Objective

You can define multiple objectives for your call plan period. You can associate messaging plans with these objectives. When associating messaging plans, you must provide a segment code for each association. The segment code indicates which messaging plan to recommended for which segments of the targeted contacts.

A single messaging plan can be associated with multiple objectives, and multiple messaging plans can be associated with a single objective. You can also have the same target segment code for multiple messaging plans.

Specifying a Segment Code for a Target

The following procedure shows you how to specify a segment code for a target.

To specify a segment code for a target

1. Navigate to the Objectives screen, then the My Objectives view.
2. In the Objectives list, select a record and drill down on the Objective field.

3. Click the Target Contacts tab.
4. In the Target Contacts list, select an existing target contact record or create a new target contact record and complete the necessary fields.
5. For each target contact, specify a Segment field value.
   For example High, Medium, or Low.

Associating a Messaging Plan With an Objective

The following procedure shows you how to associate a messaging plan with an objective.

To associate a messaging plan with an objective

1. Navigate to the Objectives screen, then the My Objectives view.
2. In the Objectives list, select a record and drill down on the Objective field.
3. Click the My Messaging Plans List tab.
4. In the My Messaging Plan List, create a new messaging plan record to associate with the objective and complete the necessary fields.
   - Select a messaging plan in the Name field.
     This messaging plan will be associated with the objective.
   - For each associated messaging plan, specify a Segment field value equal to the value that you specified for the target (for example, High, Medium, Low).
     This action indicates which messaging plan to use with which segment of the target contacts.

When you create a new call on target contact, you can select the Objective for the call. When you click Detail in Call Detail View, PCD compares the segment code on the target to find the recommended messaging plans that are accessible to you. These messaging plans are displayed on in PCD Viewer. For more information about recommended messaging plans, see *About Recommended Messaging Plans*.

Associating a Messaging Plan with Contact Call Offers

Brand teams create new Contact Call offers as part of the campaign planning and execution process. The Contact Call offers are marketing communications that can be delivered by sales representatives as part of their face to face calls. Once a messaging plan is created and released, you can navigate to the Offers screen, then the Contact Call Offers view to associate a messaging plan with the Contact Call offer.

You can view the marketing communications (offers) targeted to a contact when planning a Contact Call. When you launch the PCD Viewer for a call on a target contact, PCD loads the messaging plan associated to the Contact Call offers accessible to you for the target contact as recommended messaging plans. You can use switch presentation and select the appropriate messaging plan.

To associate messaging plans with contact call offers

1. Navigate to the Offers screen, then the Contact Call Offers screen.
2. Select a record from the list, then drill down on the Name field.
3. Click the My Messaging Plans List tab.
4. In the My Messaging Plan List, create a new messaging plan record to associate with the contact call offer and complete the necessary fields.
   Select a messaging plan in the Name field.

This messaging plan will be associated with the contact call offer.

Personalizing Messaging Plans

You can create a personalized messaging plan that is assigned to you and modify or personalize it as required. The new personalized messaging plan is accessible only to the user who personalized it. The following procedure shows you how to create a personalized messaging plan.

To personalize a messaging plan

1. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
2. In the Messaging Plan list, select a record and verify that the Allow Personalization check box is selected for the messaging plan.
   - If the Allow Personalization check box is selected, then this messaging plan will appear in the Personalized Plan list, from where you will be able to use the Personalize button to personalize the messaging plan.

     The Personalize button in the Personalized Plan list is available only for messaging plans where the Allow Personalization check box is selected.

     If the Allow Personalization check box is not selected for a messaging plan, then the Personalize button will not be available for that messaging plan and you will not be able to personalize the messaging plan.
   - If the Allow Personalization check box is not selected for a messaging plan (which has not been released yet), then you must select the record and then change the Allow Personalization check box setting.

     > **Note:** For released messaging plans, the user who created the messaging plan must first revise the released messaging plan to make it personalizable. For more information, see *Revising Messaging Plans*.

   - If creating a new messaging plan, select the Allow Personalization check box, then define access to the messaging plan and release the messaging plan. For more information, see *Creating Messaging Plans* and *Defining Access to, Releasing, and Revising Messaging Plans*.
3. Navigate to the Messaging Plans screen, then the Personalized Plans view.
4. In the Personalized Plans list, select the plan that you want to personalize, and then click the Personalize button.

   A new Personalize messaging plan record appears.

   All presentation items, related messages, and products detailed are automatically copied over to the new personalized messaging plan.
5. Enter the name of the new personalized messaging plan in the Name field.

   Other fields in the Personalize messaging plan record include the following:
   - The Owner field is automatically populated with the Login User ID value.
   - The Status field is automatically populated with the In Progress value.
   - The Start Date and Expiration Date field values are inherited from the original messaging plan and cannot be changed.

6. Add new or modify the existing information in the new Personalize messaging plan record as required.
   a. Modify the Presentation Items information as required.

      You can choose to hide presentation items that have a Status value of Show. You do this by changing the Status value on the presentation item to Hide. Presentation items that have a status of Hide are not copied over to the new personalized messaging plan.

      You cannot hide presentation items that have a Status value of Show and a Required value of true (that is, the Required check box is selected).
   b. You cannot change or personalize the Related Messages information.

      If the parent Presentation Items of a Related Messages item are hidden, then the respective Related Messages items are also hidden in the PCD Viewer when delivering the presentation.
   c. The Products Detailed information is inherited from the parent messaging plan and cannot be changed.

   For more information about modifying messaging plan information, see *Creating Messaging Plans* and *Updating Messaging Plans*.
7. The next time that you access the PCD Viewer in Siebel CRM, note that you will be able to:
   - See the new personalized messaging plan in the list of available messaging plans.
   - Start the new personalized messaging plan from the viewer. Only presentation items that have a Status of Show will be available in the player.

For more information about accessing and using the PCD Viewer, see *Accessing and Delivering Messaging Plans Using the PCD Viewer*.

Accessing and Delivering Messaging Plans Using the PCD Viewer

PCD enables sales representatives to provide high impact presentations using multimedia visualization content created by the marketing teams. The PCD Viewer provides the mechanism to start an interaction session, switch between different product messages, show related collateral, show detailed level messages, or collect feedback.

PCD Viewer auto-loads the optimal set of messaging plans for each customer visit. You can capture electronic signatures for samples during a call or visit. PCD Viewer tracks the messages presented and the time spent on each message. You can indicate a physician's response and add notes based on a call or conversation.

Before using the PCD Viewer, plan for presentation delivery by reviewing the available messaging plans and any existing call presentation information. In addition, do the following:

- Create appropriate literature records and associate literature with messaging plans in Siebel CRM. For more information, see *Managing Content for Personalized Content Delivery*.
- Define access to, release, and revise messaging plans as required. For more information, see *Working with Messaging Plans*.

To deliver a presentation using the PCD Viewer, see the following:

- *Showing Presentations Using the PCD Viewer*
- *Recording Responses to Presentations*

Showing Presentations Using the PCD Viewer

You use the PCD Viewer inSiebel Life Sciences applications to deliver personalized content to customers, to present information about products to customers, and to obtain feedback from customers about product presentations and personalized content delivered. You start the viewer by selecting the Detail button. The following procedure shows you how to deliver personalized content and presentations to customers.

The PCD Viewer is available in Siebel Life Sciences applications for Contacts, Accounts, Call Activities (from the Account Call and Contact Call subviews), and Messaging Plans.

To show presentations using the PCD Viewer

1. Navigate to one of the following screens or views in Siebel CRM:
    - Contacts screen
    - Accounts screen
    - Call Activities screen, then the Account Call view
    - Call Activities screen, then the Contact Call view
    - Messaging Plans screen
2. Click the Detail button.

    The messaging plan preview page that opens contains the following information:

    - A list of all messaging plans (presentations), which are released and unexpired, appears first.
    - Next, the messaging plan items (presentation items or slides), which are associated with the selected messaging plan appear in thumbnail format.

      Click the Related label for a messaging plan item to show the related messages for that item (if there are any).

      If you can see the list of accessible messaging plans but only blank thumbnails, then click Generate to uncompress the messaging plan. After the messaging plan has been successfully uncompressed, you can view and access all messaging plan items (in thumbnail format) and related messages.

      For the Generate button to work properly and uncompress the messaging plan to a suitable server location, the Server Uncompression Location system preference must be set. For more information, see *Setting the Server Uncompression Location and Other System Preferences*.
3. Select the messaging plan that you want to show and then click Launch to start the presentation session.

    The messaging plan opens in the PCD Viewer.

    If Enable Direct Launch is set for messaging plans in Siebel CRM, then you can also select any messaging plan item followed by Launch to start the presentation. In this case, the messaging plan item opens in full-screen mode in the PCD Viewer. To see any preceding items in the presentation, navigate back to them as needed.

4. Navigate the presentation as follows:

    a. Use the forward and back arrows to scroll through the presentation.
    b. Click anywhere at the start of the screen to activate the header navigation bar, which has the following options:

        - **Done.** Click Done when finished showing the presentation to go to the Feedback page. For more information, see *Recording Responses to Presentations*.
        - **Exit.** Click Exit to cancel the presentation session and exist the PCD Viewer.
        - **Full.** Click Full to show the presentation in full-screen mode.
        - **Contacts.** Click Contacts to show the contacts that are attending the presentation, click Add to add more contacts if additional contacts join the presentation, and then click Player to return to and continue with the presentation session in the PCD Viewer.

          A contact call is created after you suspend response logging or submit the responses logged for any contact that joins the presentation during the presentation session. At least one contact is necessary to submit the presentation feedback. For more information, see *Recording Responses to Presentations*.
        - **Related**. Click Related to go to and preview a slide's related messaging plan items. Click Player in the header navigation bar to return to the main slide.

    c. Click anywhere at the end of the screen to activate the footer navigation bar, which shows the messaging plan items in thumbnail format. Then do the following as required:

        - Click any thumbnail image to show the selected messaging plan item in full-screen mode.
        - Use the forward and back arrows to scroll through the thumbnail images.

Recording Responses to Presentations

You use the PCD Viewer inSiebel Life Sciences applications to present interactive, promotional content to customers and then to capture the customer responses to that presentation content. You start the viewer by selecting the Detail button.

When you have finished showing a presentation by clicking Done in the header navigation bar, the Feedback page opens showing a summary of the presented material in thumbnail format and the time (in seconds) spent on each slide. On the Feedback page, you can capture the customer responses to the presentation content using the star rating control.

To record responses to presentations

1. Click Done when you have finished showing the presentation.

   The Feedback page opens showing the list of contacts who attended the presentation session. For each selected contact, a summary of the content that was presented including the time spent (in seconds) on each presentation item appears after the Contact list in thumbnail format. For more information about showing presentations, see *Showing Presentations Using the PCD Viewer*.

2. Capture the customer rating for each presentation item as follows:

   a. Select the appropriate number of stars after each presentation item as required.

      The significance of each star rating is as follows:

      - One star indicates Rejected.
      - Two stars indicates Not Interested.
      - Three stars indicates Need Data.
      - Four stars indicates Continue Discussion.
      - Five stars indicates Accepted.
      - No stars indicates No Feedback.

        The last option (no stars, indicating no feedback) is allowed only if the Disable Response check box is selected (False) for the messaging plan in Siebel CRM, making the logging of customer feedback to presentations optional.

        If the Disable Response check box is not selected (True) for the messaging plan in Siebel CRM, then response ratings must be logged for all presentation items before you will be allowed to submit the presentation feedback. For more information about creating messaging plans in Siebel CRM, see *Creating Messaging Plans*.

        If the following message appears, then you cannot proceed until you provide a rating for each presentation item: *Rating is a must*.

        The feedback rating that is captured for each presentation item applies for all account and contact call attendees. If required, capture the individual ratings for each attendee on a contact call as shown in the following step.

   b. For contact calls, capture the individual ratings for each attendee on the call as follows:

      - Select a contact in the Contact list.
      - For each presentation item, select or deselect the check box associated with the item as required.

        Selecting the check box indicates that you want to record an individual rating for the contact on the presentation item.

        Deselecting the check box indicates that you do not want to record an individual rating for the contact on the presentation item because, for example, the contact joined the presentation session after the presentation started and was not present when the presentation item was shown.
      - Select the appropriate number of stars after each presentation item where the check box is selected. The significance of each star is shown in the previous step.

        For account calls, you cannot capture the individual ratings for attendees.

   c. If required click Suspend to save all response ratings logged so far and exit the PCD Viewer.

      A contact call is created after you suspend the response logging for any contact that joined the presentation during the presentation session. At a later time, you can return to the respective contact

call that was created when you selected Suspend to finish providing feedback or modify the existing feedback as required.

d. Click Submit when you have recorded all feedback.

- The response ratings are logged under the Presentation Details applet for the contact call or account call. The following table describes the fields in the Presentation Details applet.

Field	Description
Message	The name of the presentation item (messaging plan, messaging plan item, or related messaging plan item) that was shown during the call.
Response	The response rating recorded for the presentation item.
Duration	The duration in seconds that the presentation item was shown during the call.
Sequence	Tracks the sequence of the presentation items that were detailed during the call.

- A record for the product associated with the messaging plan is created under Products Detailed for the call.

- After you submit the presentation feedback, all feedback-related account and contact call records are editable until the respective call is submitted. For attendee calls, however, all feedback-related records are locked after you submit the presentation feedback. At least one contact is necessary to submit the presentation feedback.

Decompressing PCD Content

As part of remote synchronization based on catalog visibility, all new messaging plans and PCD content files are automatically downloaded to the remote client. Sales representatives must decompress and cache the PCD content before they can use the new PCD content and messaging plans for an interactive session during a call.

Click the Decompress button on the Siebel Business Application toolbar to decompress PCD content. Literature records have a calculated field called NeedToSync. The value in this field changes to True if the literature record is modified after decompression.

If the CheckForNeedToSync user property is set to Y, then the next time you click Decompress, only messages with the NeedToSync user property set to Y are decompressed. Otherwise, all messages are decompressed. For more information, see *Setting the Server Uncompression Location and Other System Preferences*.

PCD Viewer APIs

The following table describes the APIs that you can use to perform specific operations in the PCD Viewer. You access these APIs from external JavaScript files which have been packaged into ZIP files. The ZIP files in turn are added as

presentation items to messaging plans. External JavaScript files can, for example, call these APIs to perform specific operations in the following manner:

```
var arg = [];
arg[0] = "API Name";
arg[1] = "Parameter1"; window.parent.postMessage(arg, "*");
```

For example:

```
var arg = [];
arg[0] = "detailerMenuBar";
arg[1] = "hide"; window.parent.postMessage(arg, "*");
```

where:

- `"detailerMenuBar"` is the API Name.
- `"hide"` is the additional parameter required to invoke that API.

API Name	Description	Arguments and Values
detailerMenuBar	Used to show or hide the title (or header navigation) bar in the PCD Viewer.	Argument: arg1 Value: hide or show
detailerThreadBar	Used to show or hide the footer navigation bar in the PCD Viewer.	Argument: arg1 Value: hide or show
GotoNextItem	Used to navigate to the next item in a presentation (or messaging plan).	Argument: none
GotoPreviousItem	Used to navigate to the previous item in a presentation (or messaging plan).	Argument: none
NavigateToItem	Used to navigate to a specific item in a presentation (or messaging plan).	Argument: arg1 Value: The name of the item to which you want to navigate to.
RelatedItemStartTime	Used to start time tracking on related messages or items. A related message does not necessarily have to be a literature record - it can be another file inside the ZIP.	None
RelatedItemEndTime	Used to stop time tracking on related messages.	Argument: arg1 Value: The file name of the related message.

Using Signature Control for Personalized Content Delivery

With signature control, users can capture signatures for samples disbursement to qualified contacts.

This section contains the following topics:

- *About Loading Signature Control*
- *Configuring Signature Control Modes*
- *Signature Capable Messages*
- *Capturing a Signature*
- *Modifying Contacts in the Signature Component*
- *Deleting a Sample Row*
- *Cancelling a Transaction*
- *Viewing all Captured Signature Data*

About Loading Signature Control

There is a separate component for capturing signatures in Flex. This component is available in PCD as an `swf` file called SignatureCtrl.swf.

Signature control can be loaded in PCD using three different modes:

- **Mode 1.** A signature message is defined on the message plan and the current message has an allocated space for the signature control. For information about configuring this mode, see *Configuring Mode 1 Signature Control*.
- **Mode 2.** A signature message is not defined on the message plan and the current message has an allocated space for the signature control. For information about configuring this mode, see *Configuring Mode 2 Signature Control*.
- **Mode 3.** A signature message is not defined on the message plan and the current message does not have an allocated space for the signature control. This is the default configuration, no additional configuration is needed for this mode.

Configuring Signature Control Modes

This section outlines the required configuration steps for different signature control modes. For additional information about the modes available, see *About Loading Signature Control*.

Configuring Mode 1 Signature Control

This topic contains information about configuring signature control for mode 1. When the instructions in this section are applied to a messaging plan, the specified signature message will be displayed when the representative clicks Sign.

To configure mode 1 signature control

1. Navigate to the Administration - Document screen, then the Literature view.
2. Load the signature message in view.

   For more information, *Loading Content for Personalized Content Delivery Usage*.
3. Set the value of field `SubType` to Signature Capable.

   For more information, see *Signature Capable Messages*.
4. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
5. Click the name of the messaging plan to which you want to associate the signature message.
6. Click the Signature Asset tab.
7. Click the New button and associate a signature message with the messaging plan.

Configuring Mode 2 Signature Control

This topic contains information about configuring signature control for mode 2. When the instructions in this section are applied to a messaging plan, the specified signature message will be embedded in the message that is being played at that moment.

To configure mode 2 signature control

1. Navigate to the Administration - Document screen, then the Literature view.
2. Load the signature message in view.
3. For more information, see *Loading Content for Personalized Content Delivery Usage*.
4. Set the value of field SubType to Signature Capable.

   For more information, see *Signature Capable Messages*.
5. Navigate to the Messaging Plans screen, then the Messaging Plan List view.
6. Either create a new messaging plan or update an existing messaging plan.

   For more information, see *Creating Messaging Plans* and *Creating Messaging Plans*.
7. While creating or updating a messaging plan, add the signature message to the plan as a presentation item.

Signature Capable Messages

A signature capable message is an SWF file that has a space allocated in it for displaying the PCD signature control: SignatureCtrl.swf. The file communicates with both the signature control and the PCD application.

To properly implement a signature capable message certain requirements are member variables must be set, and certain methods must be applied. Follow the requirements in the following sections before using signature control:

- *Member Variable Requirement for Signature Capable Messages*
- *Method Requirements for Signature Capable Messages*

Member Variable Requirement for Signature Capable Messages

In order to hold a pointer to the SignatureCtrl.swf embedded within the message set the following variable:

```
private var m_signCtrl:SystemManager;
```

This pointer will be used to invoke methods in SignatureCtrl.swf

Method Requirements for Signature Capable Messages

The following method requirements must be met in order to properly implement signature control:

- The appLoaded method must be called on the applicationComplete event with the following predefined string:

  ```
  Application.application.signAssetLoadComplete(this);
  ```

  For an example of this method requirement, see *FlexApp appLoaded Example*.
- The loadSignCtrl method will be called by the Interactive Detailer to notify the Asset with the path of the SignatureCtrl.swf and asset will load.

  For an example of this method requirement, see *FlexApp LoadSignCtrl Example*.
- The InvokeSignCtrlMethod method will be called by the Interactive Detailer to invoke a method in SignatureCtrl.swf by way of the Asset.

  For an example of this method requirement, see *FlexApp InvokeSignCtrlMethod Example*.

FlexApp Examples

FlexApp is a sample signature asset created in Flex. This asset has the following minimum method requirements:

- Loading the SignatureCtrl.swf
- Enabling communication between the Interactive Detailer and the signature control, by way of the Signature Asset

FlexApp appLoaded Example

FlexApp.mxml has a method called appLoaded. The `appLoaded` method is called by the applicationComplete event. The call is shown in the following sample:

```
<mx:Application .....applicationComplete="appLoaded();">
 .....
 public function appLoaded():void
 {
 Application.application.signAssetLoadComplete(this);
 }
```

The appLoaded method notifies the parent application -- in this case Interactive Detailer -- that the Signature Asset is loaded and ready to load SignatureCtrl.swf, using the following statement:

```
Application.application.signAssetLoadComplete(this);
```

Where Application.application refers to Interactive Detailer and signAssetLoadComplete refers to a method in Interactive Detailer that receives a pointer to the Signature Asset as an input parameter. This pointer will be used by the Interactive Detailer to send data to the SignatureCtrl.swf embedded in the Asset.

FlexApp LoadSignCtrl Example

FlexApp.mxml has member variable of type SystemManager. This member variable holds a pointer to the SignatureCtrl.swf embedded within the asset. The pointer is shown in the following sample:

```
private var m_signCtrl:SystemManager;
```

```
public function loadSignCtrl(strSignCtrl:String):void
{
loader.autoLoad = true;
loader.percentHeight = 100;
loader.percentWidth = 100;
loader.load(strSignCtrl);
loader.addEventListener(Event.INIT, loadComplete);
loaderBox.addChild(loader);
}
private function loadComplete (event:Event):void
{
m_signCtrl = SystemManager(event.target.content);
}
```

The Interactive Detailer sends the path of SignatureCtrl.swf and notifies the Signature Asset to load the Signature Control by calling a method called loadSignCtrl. This is all implemented by the Asset.

The Signature Asset method, loadSignCtrl, will load SignatureCtrl.swf into an SWF loader. The pointer to SignatureCtrl.swf is stored in the member variable m_signCtrl, as displayed in the loadComplete function.

FlexApp InvokeSignCtrlMethod Example

FlexApp.mxml also implements a method called InvokeSignCtrlMethod. When the Interactive Detailer is required to send data to SignatureCtrl.swf, it does so by calling this method in the Asset. The following XML data is passed to the Asset:

```
public function InvokeSignCtrlMethod(strXMLData:String):void
 {
 if(m_signCtrl != null)
 Object(m_signCtrl.application).InvokeMethod(strXMLData);
 }
```

Capturing a Signature

With signature control, users can capture signatures for samples disbursement.

To capture a signature

1. Navigate to the Activities screen, then the Contact Call Detail view.

   Alternatively, navigate to the Activities screen, then the Accounts Contacts Call detail view.
2. Select a sample from Samples Dropped.

   > **Note:** You will need to pre-record the sample drops if the signature needs to be captured from contact. Signatures for Samples can be captured only for contacts valid to receive and sign for samples.

3. Click Detail to open the PCD Viewer.

   The PCD viewer auto-loads the optimal set of messaging plans for each customer interaction.
4. Click Sign from the PCD Viewer toolbar.

   > **Note:** The Sign button in the PCD viewer will only be visible if there is at least one sample drop record in the samples dropped applet in call detail view.

5. In the Signature Component, a blank space is reserved for a signature. Sign within the blank space reserved for the signature.

If the validation for Signature Capture fails, an error message is displayed. Update the call data as directed by the error message, and then click Sign to try capturing the signature again. Once you successfully save the signature, you return to the Contact Call view.

For additional information about signature validation, see *Configuring Signature Capture*.

6. Save to save the signature.

Modifying Contacts in the Signature Component

A representative can change the contact to another contact within the signature component.

For example, a representative is speaking with Dr. A. A Contact Call Record has already been created for Dr. A. The representative adds sample drop records to this call by clicking the Detail button in Call view. Now consider that the signature was captured for Dr. A and saved. The status of the record has been changed to Signed.

If instead of Dr. A, the representative selects a different contact: Dr. B. The signature control will then create a new contact call record in the Siebel database for Dr. B, and the sample records will be copied over to the new call. This new call will be validated, and the signature is captured and saved and the status of the call record will be set to Signed.

The module will only allow the representative to change the contact if the validation process confirms that the contact is eligible. Otherwise, an error message will appear.

To modify contacts in the signature component

1. Navigate to the Activities screen, then the Contact Call Detail view.

   Alternatively, navigate to Activities screen, then the Accounts Contacts Call detail view.
2. Select a sample from Samples Dropped.
3. Click Detail to open the PCD Viewer.

   The PCD viewer auto-loads the optimal set of messaging plans for each customer interaction.
4. Click Sign from the PCD Viewer toolbar.
5. Click the Change Professional button.
6. Select the desired contact.
7. Click Select.

   > **Note:** If the contact does not have a license for the geographic region, a Sign Validation Failed message will appear indicating the following: This contact does not have a license number for <region>.

8. Save the changes.

Deleting a Sample Row

A representative can delete a sample in signature component. For example, if the representative is speaking with Dr. A and discovers that the sample is not of use, the sample row can be deleted.

To delete the sample row in the signature component

1. Navigate to the Activities screen, then the Contact Call Detail screen.

Alternatively, navigate to the Activities screen, then the Accounts Contact Call detail screen.

2. Select a sample from Samples Dropped.
3. Click Detail to open the PCD Viewer.

   The PCD viewer auto-loads the optimal set of messaging plans for each customer interaction.
4. Click Sign from the PCD Viewer toolbar.
5. To delete a sample, select it first and then delete it.
6. Save the changes.

Cancelling a Transaction

The following topic describes how to cancel a transaction. The Cancel button will cancel but will not delete all of the data associated with the transaction. When the Cancel button is clicked, it marks the transaction as voided, but is sent back to the system as a no signature activity.

To cancel a transaction

1. Navigate to the Activities screen, then the Contact Call Detail screen.

   Alternatively, navigate to the Activities screen, then the Accounts Contacts Call detail screen.
2. Select a sample from Samples Dropped.
3. Click Detail to open the PCD Viewer.

   The PCD viewer auto-loads the optimal set of messaging plans for each customer interaction.
4. Click Sign from the PCD Viewer toolbar.
5. Capture a signature.
6. Cancel the changes if required.

   When you click the Cancel button in signature control, a cancelled transaction record will be written to the Siebel database only if the transaction was valid. A transaction is valid only when it passes all the validation checks and the signature was captured but the action was cancelled.

Viewing all Captured Signature Data

Once a signature is captured, it is stored in the Siebel database for future reference. You can view all of the captured signature data in one location.

To view all captured signature data

1. Navigate to the Administration - Samples screen, then the Sample Audit Administration.
2. Navigate through the list to view all of the signatures.
3. Sort the columns by the criteria that you want.

> **Note:** You can use Query (the magnifying glass icon) to search for a signature.

27 Setting Up and Configuring Safety System Integration

Setting Up and Configuring Safety System Integration

This chapter covers setting up and configuring Siebel Medical for safety system integration with a third-party application. It includes the following topics:

- *Overview of Safety System Integration*
- *Customizing Safety System Integration Web Services*
- *Process of Setting Up Safety System Integration for Siebel Medical*
- *Logging a Product Issue for Safety System Integration*
- *Reviewing a Product Issue for Safety System Integration*
- *Sending a Product Issue to the Safety System*
- *Sending Product Issue Follow-Up Information to the Safety System*
- *Verifying Case Acceptance by the Safety System*
- *Verifying Case Rejection by the Safety System*
- *Voiding a Product Issue in Siebel Medical*

Overview of Safety System Integration

Reporting of adverse events can be integrated with a third-party safety system. Adverse events are logged as product issues in Siebel Medical. The following integration processes are provided:

- **Reviewing a product issue.** Siebel Medical product issue records with a status of Open can be reviewed for adverse event criteria.
- **Sending a product issue to the safety system.** The Siebel Medical product issue data can be sent to a third-party safety system for processing and reporting.
- **Sending follow-up information about the product issue to the safety system.** The submitted product issue record can be updated with follow-up information.
- **Verifying case acceptance by the safety system.** The AE Case ID and Safety System Received Date fields are automatically populated when the product issue has been accepted as an adverse event by the safety system.
- **Verifying case rejection by the safety system.** Rejection reasons for cases rejected by the safety system are posted to the inboxes of users listed in the product issue Owners field.
- **Voiding a product issue in Siebel Medical.** A product issue that has been accepted by the safety system can be voided in Siebel Medical.

The product issue status values for the integration between Siebel Medical and the third-party safety system are described in the following table.

Status	Description	Status Bar
Open	The product issue has been created and is ready to be reviewed or submitted to the third-party safety system.	The status bar is set to 25% complete.
Review Complete	The product issue has been reviewed by the call center agent or the quality manager. The Status field updates to Review Complete when the user clicks the Review Complete button.	The status bar is set to 50% complete.
Closed	The product issue has been resolved and closed. The Status field updates to Closed when the user clicks the Close button. You can set to Closed a product issue that has a status of Open, Review Complete, Submitted, Rejected, or Reopened.	The status bar is set to 100% complete.
Reopened	This value is automatically populated when the product issue has been reopened by the user. A product issue that has a status of Closed can be reopened.	The status bar is set to 25% complete.
Pending	The Status field for the product issue is automatically updated to Pending when the product issue has been written to the Java Message Service (JMS) queue, and it is pending acceptance by the safety system.	The status bar is set to 75% complete.
Submitted	This value is automatically populated when the product issue has been successfully delivered to the safety system from the Java Message Service (JMS) queue and has been accepted as a case by the safety system. The AE Case ID and Safety System Received Date fields in Siebel Medical are populated by the safety system.	The status bar is set to 75% complete.
Failed	This value is automatically populated when writing to the JMS queue fails.	The status bar is set to 50% complete.
Rejected	This value is automatically populated when the safety system has rejected the product issue.	The status bar is set to 100% complete.

Customizing Safety System Integration Web Services

Siebel safety system integration Web services can be customized for integration with any third-party safety system, or for specific business requirements. The following Web services are provided for safety system integration:

- **SWI LS Medical Update Product Issue Inbound.** Use this Web service to create inbox items to invoke a message to owners of a product issue. An external application invokes this Web service with a product issue ID number.
- **SWI LS Medical Product Issue Create Inbox Item Inbound.** Use this Web service to update product issue information such as AE Case ID, Safety System Received Date, and Status. An external application invokes this Web service with the product issue ID, and updated data.

For more information on customizing Siebel Web services, see *Siebel CRM Web Services Reference* .

Process of Setting Up Safety System Integration for Siebel Medical

To set up safety system integration for Siebel Medical, perform the following tasks:

- *Activating Workflows for Safety System Integration*
- *Configuring Web Services for Safety System Integration*
- *Enabling Siebel Server Component Groups for Safety System Integration*
- *Creating the Directory Structure on the Siebel Server for Safety System Integration*
- *Creating the Oracle WebLogic Full Client JAR for Safety System Integration*
- *Creating the JNDI Properties File for Safety System Integration*
- *Creating the JVM Subsystem for Safety System Integration*
- *Configuring Java Message Service Parameters for Safety System Integration*
- *Configuring Siebel Medical for Safety System Integration*

Activating Workflows for Safety System Integration

This task describes how to activate the workflows that are required for safety system integration. You can modify the workflows to suit your own business model, using Siebel Business Process Designer.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To activate workflows for safety system integration

1. Make sure each of these Workflow Processes is active. For more information, see *Siebel Business Process Framework: Workflow Guide*
   - LS Medical Update Product Issue Inbound
   - LS Medical Product Issue Create Inbox Item Inbound
   - LS Medical Product Issue Validation Workflow
   - LS Medical Product Issue Send To Safety
   - LS Medical Product Issue Close

Configuring Web Services for Safety System Integration

This task describes how to configure the inbound Web services that are required for safety system integration.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

Note: It is recommended that you use HTTPS authentication. For information on configuring Secure Sockets Layer (SSL) for HTTPS authentication, see *Siebel Security Guide* .

To configure Web services for safety system integration

1. Navigate to the Administration - Web Services screen, then the Inbound Web Services view.
2. Query for the SWI LS Medical Update Product Issue Inbound Web service.
3. On the Service Ports applet, update the Address variable to point to your Web server.
4. Query for the SWI LS Medical Product Issue Create Inbox Item Inbound Web service.
5. On the Service Ports applet, update the Address variable to point to your Web server.
6. Click Clear Cache on the Inbound Web Services applet.

For more information on configuring Web Services, see Integration Platform Technologies: *Siebel Enterprise Integration Manager Administration Guide* on the *Siebel Bookshelf* .

Enabling Siebel Server Component Groups for Safety System Integration

This task describes how to activate the component groups that are required for safety system integration.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To enable Siebel Server component groups for safety system integration

1. Navigate to the Administration - Server Configuration screen, and then the Component Groups view.
2. Query for the Workflow Management Component Group.
3. On the Component Groups applet, click the Enable button.
4. Query for the EAI Component Group.
5. On the Component Groups applet, click the Enable button.
6. Restart the Siebel Server.
7. Navigate to the Administration - Server Management screen, then the Servers and Component Groups view.
8. Verify that the State value for the Workflow Management and EAI Component Groups is set to Online.

Creating the Directory Structure on the Siebel Server for Safety System Integration

This task describes how to set up the directory structure required for JMS communication with the Oracle WebLogic Server.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To create the directory structure on the Siebel Server for safety system integration

1. Create the following directory for storing the JNDI properties file and JAR files on the Siebel Server: `D:\WLSJMS`.
2. Create the following directory for storing the log file on the Siebel Server: `D:\WLSJMS\log`.
3. Copy Siebel.jar and SiebelJI_enu.jar from the Siebel installation directory to `D:\WLSJMS`.

Creating the Oracle WebLogic Full Client JAR for Safety System Integration

This task describes how to create the Oracle WebLogic full client JAR required for safety system integration. You use the Oracle WebLogic JarBuilder tool to generate the full client JAR. The JAR file is then added to the classpath.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To create the Oracle WebLogic full client JAR for safety system integration

1. Log on to the Oracle WebLogic server.
2. Change the directory to the `server/lib` directory, using the following command:

   ```
   cd WL_HOME/server/lib
   ```

3. Create wlfullclient.jar in the `server/lib` directory, using one of the following commands.

JDK Version	Command
Version 1.5	`java -jar wljarbuilder.jar -profile wlfullclient5`
Version 1.6	`java -jar wljarbuilder.jar`

4. To add the Oracle WebLogic full client JAR to the classpath, copy it to the `D:\WLSJMS` directory on the Siebel Server.

Creating the JNDI Properties File for Safety System Integration

This task describes how to create the JNDI properties file required for safety system integration.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To create the JNDI properties file for safety system integration

1. Create the file, `D:\WLSJMS\jndi.properties`, on the Siebel Server.
2. Add the following JNDI properties to the file:

   ```
   java.naming.factory.initial=weblogic.jndi.WLInitialContextFactory
   java.naming.provider.url=t3://Host IP Address:Port
   ```

   where:

   Host IP Address is the IP address of the AIA server.

   Port is the port where the Web server instance is listening for connections.

Note: Make sure there are no spaces at the end of the lines in the file jndi.properties. Spaces will cause the connection to fail.

Creating the JVM Subsystem for Safety System Integration

This task describes how to create the JVM subsystem required for safety system integration.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To create the JVM Subsystem for safety system integration

1. In the Siebel application, navigate to the Administration - Server Configuration screen, then the Enterprises view.
2. Select the Enterprise Server that you want to configure, and then click the Profile Configuration tab.
3. Create a new enterprise profile record and complete the necessary fields.
    - Set the following parameters on the form that appears:

Name	Value
Profile	JAVA
Alias	JAVA
Subsystem Type	JVMSubsys

    - Set the following parameters in the Profile Parameters list applet.

Name	Alias	Data Type	Value

JVM Classpath	CLASSPATH	String	Set the classpath value as follows:
			- Windows. The files in the classpath must be separated by semicolons (;) and end with a semicolon and period (;.), for example:
			`D:\WLSJMS;D:\WLSJMS\Siebel.jar;D:\WLSJMS\SiebelJI_enu.jar;D:\WLSJMS\wlfullclient.jar;.`
			- UNIX. The files in the classpath must be separated by colons (:) and end with a colon and period (:.), for example:
			`/usr/wlsjms:/usr/wlsjms/Siebel.jar:/usr/wlsjms/SiebelJI_enu.jar:/usr/wlsjms:.`

Name	Alias	Data Type	Value

JVM DLL Name	DLL	String	Set the path to the JVM library file, for example:
			- Windows:
			`<JAVA_HOME>/jdk/jre/bin/server/jvm.dll`
			- UNIX:
			`<JAVA_HOME>/jre/lib/sparc/client/libjvm.so`

JVM Options	VMOPTIONS	String	Set the JVM-specific options for the log file, for example:
			- Windows:
			`-Djms.log=D:\WLSJMS\log\jms.log`
			- UNIX:
			`-Xusealtsigs -Xrs -Djms.log=/usr/wlsjms/log/jms.log`

Configuring Java Message Service Parameters for Safety System Integration

This task describes how to configure Java Message Service parameters required for safety system integration.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To configure Java Message Service parameters for safety system integration

1. In the Siebel client, navigate to the Administration - Server Configuration screen, then the Enterprises view.
2. Select the Enterprise Server that you want to configure, and then click the Profile Configuration tab.
3. Create a new enterprise profile record and complete the necessary fields.
    - Set the following parameters on the form that appears:

Name	Value
Profile	JMSParameters_SafetySystem
Alias	JMSParameters_SafetySystem
Subsystem Type	JMSSubsys

Name	Value

- Set the following parameters in the Profile Parameters list applet.

Name	Value
ConnectionFactory	jms/aia/AIA_SEBLDrugSafetyReportJMSQueueCF
SendQueue	jms/aia/AIA_SEBLDrugSafetyReportJMSQueue
SendUsername	Set the value to the Oracle WebLogic user name. **Note:** The Oracle WebLogic user must have access to the JMS queue.
SendPassword	Set the value to the Oracle WebLogic user password. The password is visible in plain text until the profile is saved and refreshed.

4. Restart the Siebel Server.

Configuring Siebel Medical for Safety System Integration

This task describes mapping a protocol in Siebel Clinical to a study in the safety system.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To configure Siebel Medical for safety system integration

1. Navigate to the Administration Clinical screen, then the Protocol List view.
2. In the Protocols list, drill down on the protocol number (#) of the protocol that you want to send adverse event information about.
3. Click the More Info tab.
4. In the Integration applet, set the Safety Study ID to the ID of the study in the safety system.

Logging a Product Issue for Safety System Integration

This task describes how to create a product issue in the Product Issues screen. To create a product issue from a service request, see *Capturing Adverse Events and Complaints as Service Requests*.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To log a product issue for safety system integration

1. Navigate to the Product Issues screen, then the Product Issue view.
2. In the Product Issue List, create a new record and complete the necessary fields for the integration.

   Some fields are described in the following table.

Name	Description	Required
AE Case ID	This field is populated with the adverse event case ID when the case is accepted by the safety system.	No
Awareness Date	The date the company was made aware of the event.	Yes
Country of Incidence	This list of values displays the countries that are configured in Siebel CRM.	Yes
Description	Detailed description of the adverse event.	Yes
Event Type	Describes the type of event, such as adverse drug event or adverse, medical-device event.	Yes
Event Severity	This field captures the severity of the product issue. The following list of values is provided: o Mild o Moderate o Severe	No
Last Follow Up Date	This field displays the date that follow-up information on the adverse event was last recorded.	No
Product	The name of the product associated with the adverse event.	Yes
Received Date	The date when a company representative became aware of the event.	No
Reportable	Set this field to one of the following values: o Yes o No o Potential o Follow Up	Yes

Name	Description	Required
	○ Void	
Reported Outcome	This field captures the reported outcome for the product issue. The following list of values is provided: ○ Recovered ○ Recovering ○ Not Recovered ○ Resolved with Sequelae ○ Fatal ○ Unknown	No
Reporter Qualification	This field captures whether the reporter is a health professional, lawyer, or consumer. The following list of values is provided: ○ Physician ○ Pharmacist ○ Other Health Professional ○ Lawyer ○ Consumer or Non-Health Professional	No
Report Type	This field captures whether or not the product issue was reported during a study. The following list of values is provided: ○ Spontaneous ○ Study ○ Other ○ Not available to Sender	Yes
Safety System Received Date	This field is populated with the date when the case was accepted by the safety system.	No

3. (System) The product issue Status field is set to Open by default.

Reviewing a Product Issue for Safety System Integration

You can review Siebel Medical product issue records with a status of Open for adverse event criteria.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To review a product issue for safety system integration

1. Navigate to the Product Issues screen, then the Product Issue view.
2. In the Product Issue List, review the product issue for adverse event or product complaint criteria.
3. (Optional) In the Reportable field, select Yes, No, or Potential.
4. Click Review Complete.

   The product issue Status field updates to Review Complete.

Sending a Product Issue to the Safety System

You can send the Siebel Medical product issue data to a third-party safety system for processing and reporting.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To send a product issue to the safety system

1. Navigate to the Product Issues screen, the Product Issue view.
2. In the Reportable field, select Yes or Potential.
3. Click Send to Safety.

   The User Authentication screen is displayed.
4. Enter user name and password.
5. Click Verify.

   The Status field for the product issue updates to Pending when the product issue has been written to the Java Message Service (JMS) queue, and it is pending acceptance by the safety system.

Sending Product Issue Follow-Up Information to the Safety System

You can update the submitted product issue record with follow-up information.

This task is a step in *Process of Setting Up Safety System Integration for Siebel Medical*.

To send product issue follow-up information to the safety system

1. Navigate to the Product Issues screen, then the Product Issue view.
2. In the Product Issue List, drill down on the record (in the PI# field) for which follow-up information must be sent.
3. Update the Product Issue record with the follow-up information.
4. In the Reportable field, select Follow Up.
5. Click Send to Safety.

Verifying Case Acceptance by the Safety System

The safety system populates the AE (Adverse Event) Case ID and Safety System Received Date fields when the adverse event has been accepted.

To verify case acceptance by the safety system

1. Navigate to the Product Issues Screen, the Product Issue view.
2. In the Product Issue List, drill down on the record (in the PI# field) for the case that you want to verify.
3. Verify that the following fields have been populated:
    - **AE Case ID.** This field is populated with the case ID that the safety system assigns.
    - **Safety System Received Date.** This field is populated with the time and date on which the case was accepted in the safety system.
    - **Status**. This field is set to Submitted when the case has been accepted by the safety system.

Verifying Case Rejection by the Safety System

Rejection reasons for cases rejected by the safety system are posted to the inboxes of users listed in the product issue Owners field.

To verify case rejection by the safety system

1. Log in to Siebel Medical.
2. Navigate to the Inbox applet.

    Rejected cases are listed in the Inbox applet by product issue number in the Name column.

Voiding a Product Issue in Siebel Medical

You can void a product issue that has been accepted by the safety system. The AE Case ID field must have been populated by the safety system before you can void the product issue.

To void a product issue in Siebel Medical

1. Navigate to the Product Issues Screen, then the Product Issue List.
2. In the Product Issue List, select the product issue record that you want to void.
3. In the Reportable field, select Void.
4. Click Send to Safety.

    A nullification message is sent to the safety system.

28 Siebel Medical Developer's Reference

Siebel Medical Developer's Reference

This appendix contains information on configuring the Siebel Medical application in the Siebel runtime repository, and customizing Siebel Medical Web services. It assumes that you are familiar with the processes and conventions of modifying the runtime repository. For further information about doing so, see *Configuring Siebel Business Applications*.

This appendix contains the following topics:

- *Siebel Medical Workflow Reference*
- *Siebel Medical Web Services Reference*

Siebel Medical Workflow Reference

The following table shows the workflows that are required for Siebel Medical core and integration functionality. You can modify the workflows to suit your own business model, using Siebel Business Process Designer. For information on configuring workflows, see *Siebel Business Process Framework: Workflow Guide* .

Workflow Name	Siebel Medical Feature
LS Medical PA Submit workflow	AECM
LS Medical PA Withdraw workflow	AECM
LS Medical Product Issue Close	Safety system integration
LS Medical Product Issue Create Inbox Item Inbound	Safety system integration
LS Medical Product Issue Populate Report	AECM
LS Medical Product Issue Review Complete workflow	AECM
LS Medical Product Issue RR Reopen	AECM
LS Medical Product Issue RR Submit workflow	AECM
LS Medical Product Issue Send To Safety	Safety system integration

Workflow Name	Siebel Medical Feature
LS Medical Product Issue Validation Workflow	Safety system integration
LS Medical Update Product Issue Inbound	Safety system integration
LS Medical User Verification workflow	AECM

Siebel Medical Web Services Reference

Siebel Medical Web services can be customized for integration with a third-party application, or for specific business requirements. The following table shows the Medical Web services that are provided for mobile and third-party application integration. For more information on customizing Siebel Web services, see *Siebel CRM Web Services Reference* .

Web Service Name	Siebel Medical Feature
SWI LS Medical Product Issue Create Inbox Item Inbound	Safety system integration
SWI LS Medical Update Product Issue Inbound	Safety system integration

29 Siebel Pharma Developer's Reference

Siebel Pharma Developer's Reference

This appendix contains information on configuring the Pharma application in the Siebel runtime repository. It assumes that you are familiar with the processes and conventions of working with the runtime repository to change one or more user properties. For further information about changing user properties, see *Configuring Siebel Business Applications* .

This appendix contains the following topics:

- *Overview of User Properties for Siebel Pharma*
- *Targeting Configuration*
- *Enabling Inventory Reconciliation Without Lot Numbers*
- *Editing the Labels of the LS Pharma HI Activity Calendar View Buttons*
- *Configuring the EditMode User Property*
- *Submitting Contact Details from Third-Party Applications*
- *Configuring Account Contacts*
- *Configuring Personalized Content Delivery*
- *Pharma Service User Properties*
- *Siebel Pharma Business Component User Properties*

Overview of User Properties for Siebel Pharma

User properties are object definitions that are added as children to an applet, business component, control, field, or list column to configure specialized behavior beyond what is configured in the properties of the parent object definition.

Some Siebel Pharma features are driven by user properties. You can customize these features through their respective user properties. With user properties, you can control UI behavior, change default settings or leave them as they are, and enable or disable features.

This topic lists user properties that are specific to Siebel Pharma. For more information about user properties, and user properties that apply to all Siebel Business Applications, see the chapter on user properties in *Siebel Developer's Reference* .

Targeting Configuration

The Siebel Life Sciences targeting engine can be configured through the user properties found in the following two tables. The following table describes the TargetCategory user properties.

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 Pharma ships with the default values, Contacts, for contact-related business components and, Accounts, for account-related business components. One TargetCategory can be active for each business component.
Inactive	Optional	An indicator of whether the user property is active.
Comments	Optional	Comments describing the user property.

The following table describes the 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 for each 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 other business components 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 the following table to each Opportunity business component.

Field	Required	Description
Name	Required	TargetCategory.
Changed	Read-only	An indicator of whether the user property is changed (optional).
Value	Required	For example, Opportunity (or any value you choose).

Field	Required	Description
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.

Enabling Inventory Reconciliation Without Lot Numbers

As discussed in *Managing Pharma Samples* Siebel Pharma 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:

- Use Siebel Web Tools to reconfigure fields and replace business components
- Set the value of the Lots For Disperse Only system preference to TRUE
- Check the Lot# Tracking flag in the Administration - Product screen
- Deploy the changes to the Siebel runtime repository.

Reconfiguring Fields and Replacing Business Components

The following procedure shows you how to reconfigure fields and replace business components in the Siebel runtime repository.

To reconfigure fields and replace business components

1. Choose View, Object Explorer, and then the Flat tab.
2. Select Fields, and in the Fields list, query in the Picklist Column for PickList Pharma Samples Stocked Lots.
3. Lock each project by choosing Tools, and then the Lock Project.
4. In the Picklist column, replace each occurrence of PickList Pharma Samples Stocked Lots with Picklist Pharma All Unexpired Lots.
5. Choose View, Object Explorer, and then the Types tab.
6. Select Applet, and in the Applet list, query for any applet with the value Pharma Stocked Lot Pick Applet.
7. For each occurrence, set the Business Component to Pharma Sample Lot for Picklist.
8. Deploy the changes to the Siebel runtime repository.

Changing System Preferences and Enabling Lot Number Tracking

The following procedure shows you how to change system preferences and enable lot number tracking.

To change the system preferences and enable Lot# tracking

1. Log in to the Pharma web client as an administrator.
2. Navigate to the Administration - Application screen, then the System Preferences view.
3. Query for the following System Preference Name records:
    - Lots For Disperse Only
    - Samples Lots Enabled
4. Set the System Preference Value for each of these records to TRUE.
5. Navigate to the Administration - Product screen, then the Products view, and check the Lot# Tracking flag for each product that requires inventory reconciliation of samples without lot numbers.
6. Log out of the Pharma web client.

Editing the Labels of the LS Pharma HI Activity Calendar View Buttons

In the Siebel Pharma application, the LS Pharma HI Activity Calendar View has three buttons displayed on the LS Pharma Activity HI Calendar Applet. These buttons are:

- **New Contact Call.** Creates a new contact call.
- **New Acct Call.** Creates a new account call.
- **New Meeting.** Creates a new meeting.

These buttons (or controls) are not configured at the applet level, but are generated by the specialized class of the applet, namely CSSSWELSHICalendarFrame.

> **Note:** You can modify the caption of the buttons using Siebel Web Tools by changing the Caption property or specifying an alternative name in the Caption - String Override property.

Configuring the EditMode User Property

There are two special C++ classes for Pharma Medical Education:

- CSSBCPharmaMEPlan
- CSSBCPharmaMESubPlan

Both classes support the EditMode user property. When the EditMode user property value is set to 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 this user property, and therefore require administrator privileges to update or delete.

Submitting Contact Details from Third-Party Applications

When you click the Submit button from the Contact Call Detail view, the C++ class CSSSubmitFrame validates the contact details data and then invokes the CSSBCSubmitBusComp class. This business component class is the great grandparent class of the CSSBCPharmaCall (BC [Pharma Professional Call]) class.

The Pharma Professional Call class wraps the SubmitImp method in a database transaction. The SubmitImp method contains a high level call submission function that automates the entire submission process. If any part of the submission fails, then all transactions performed up to that point are rolled back. The SubmitImp method is a recursive process that calls itself for each child call (Attendee Calls) and then continues with the parent. The process contains the following four main steps:

- Create transactions for each sample dropped.
- Create transactions for each promotional item dropped.
- Set the status to Submitted.
- Update the Last Call Date for the current user.

Invoking the Submit Functionality from Third-Party Applications

There are two ways to invoke the Submit functionality from third-party applications:

- UI Layer
- Business Object Layer

Invoking Submit Functionality From the UI Layer

The following procedure shows you how to invoke the submit functionality from the UI layer.

To invoke Submit from the UI layer

1. Invoke the CSSSubmitFrame method Submit on the Pharma Professional Call form applet.
2. Make sure that the property set is empty and contains no arguments.

Note: This is equivalent to pressing the Submit button in the Contact Call Detail view.

To suppress the Submit confirmation dialog box, make sure that the business component user property, SuppressSubmitConfirmation, has the value Y on the business component Pharma Professional Call.

Invoking Submit Functionality From the Business Object Layer

The following procedure shows you how to invoke the submit functionality from the business object layer.

To invoke Submit from the Business Component object layer

1. Invoke the CSSBCSubmitBusComp class BCSubmit on the Pharma Professional Call form applet.
2. To skip the check for reconciled inventory periods, specify a property with Name equals SkipCheck in the input property set.
3. Specify a [Value] of Y or TRUE, for example, psIn.SetProperty("SkipCheck","Y").

Note: If you want to check for reconciled inventory periods, leave the input property set empty.

Invoking Submit from the Contact Call Detail View

Perform the following task to access functionality that is equivalent to when a user clicks Submit from the Contact Call Detail view.

To invoke Submit from the Contact Call Detail view

1. Invoke the Validate class on the BC [Pharma Professional Call] form applet.
2. Invoke the CSSBCSubmitBusComp class BCSubmit.

For this method to work correctly, you have to specify at least one property in the Input property set. The information in the table in topic *CSSBCPharmaCall Class Business Component User Properties* lists the user properties that are related to the Pharma Professional Call business component.

Configuring Account Contacts

The user properties outlined in the following table must be defined before you can activate a targeting period.

The columns displayed in the Account Contacts List must be configured in the user properties.

User Property Name	User Property Value	Description
CanMapColumnUpdate	*Y* Default value: Y	Set this to N to make targeting columns in Accounts Contacts List Read Only.
MapColumn *nn*	Default value: name of targeting fields	Targeting fields in the Business Component. There are 72 fields defined with different field types. Targeting Data will be mapped and copied to these fields during activation. Only the fields that you define are used for product data mapping.

The user property outlined in the following table must be defined before you can generate and update the column mapping.

User Property Name	User Property Value	Description
MapColumn *nn*	Default value: Name of product attribute fields.	Product data fields in the Business Component. Fields that contain data must be defined, so they can be used to generate column mapping, and can be updated by the Accounts Contacts List.

Configuring Personalized Content Delivery

This section includes the following topics for configuring personalized content delivery:

- *Setting the Server Uncompression Location and Other System Preferences*
- *Availability of Messages in PCD Planner*
- *Availability of Messaging Plans in the PCD Viewer*
- *PCD Business Component Calculated Fields*
- *About Recommended Messaging Plans*
- *Optimize Detailing Plan Method*
- *Identifying Recommended Messaging Plans*
- *Modifying a Tooltip in the PCD Viewer*
- *User Properties of the PCD Applets*
- *User Properties of LS PCD Business Service*
- *API for Using Multi-file Content*
- *API for Recording Section Data*

Setting the Server Uncompression Location and Other System Preferences

The following procedure shows you how to set the Server Uncompression Location system preference and other system preferences for PCD in Siebel CRM.

You must set the Server Uncompression Location system preference so that when you select the Generate button in Siebel applications, the messaging plan contents will be uncompressed to the location specified by the Server Uncompression Location system preference.

To set the server uncompression location and other system preferences for PCD

1. Log in to the Siebel business application.
2. Navigate to the Administration - Application screen, then the System Preferences view.
3. Query for the Server Uncompression Location system preference.
4. Enter the server location path where you want uncompression to happen as shown in the following table.

Platform	Sever Location Path
Windows Server	For example, the server location path for a Windows server is:

Platform	Sever Location Path
	`C:\BuildFolder\ai\applicationcontainer_external\siebelwebroot` You must always provide the `ai\applicationcontainer_external\siebelwebroot` path in the Siebel Server installation path (`BuildFolder\`) where you want uncompression to happen; this applies also for hybrid environments.
Non-Windows Server	For example, the server location path for a non-Windows server is: `/export/home/sblqa1/BuildFolder/ai/applicationcontainer_external/siebelwebroot` Where `sblqa1` is the user.

Note: Before redeploying the siebel.war file or restarting tomcat server, it is recommended that you back up the files in `<Siebel_Install_Path>\ai\applicationcontainer_external\siebelwebroot\files` and manually replace them after redeploying the siebel.war file.

5. Set the other system preferences as described in the following table.

Name	Value	Description
Decompressed Files Path	`filesystem\assets` **Note:** On UNIX, the value is: `filesystem/assets`.	Specifies the path of the decompressed messages. Do not use slash (\ or /) at either end of the string.
CheckForNeedToSync	N	If the CheckForNeedToSync user property is set to Y, then the next time you click Decompress in the Siebel Toolbar, only messages with the NeedToSync user property set to Y are decompressed. Otherwise, all messages are decompressed. When you click Decompress in the Siebel toolbar, the decompression time stamp is recorded in the S_USER table. Literature records have a calculated field called NeedToSync. The value in this field changes to True if the literature record is modified after decompression.

Availability of Messages in PCD Planner

Your system administrator loads and verifies messages in the Literature view of the Document Administration screen. The administrator can then associate categories to the messages to make them visible to users creating messaging plans. Users create new messaging plans using the PCD Planner. Messages that are loaded in PCD Planner appear in the Items tab. Access to the messages depends on the catalog visibility associated to the messages and the CanLoadInPlanner calculated field in the Admin Sales Tool business component. A message with the field, CanLoadInPlanner, set to Y is available to users and is loaded into PCD Planner.

The CanLoadInPlanner calculated field is set to Y if the following conditions apply:

- The Literature record is of type Message.
- The message has a status of Active; that is, the release date is before or is today's date and the expiration date is greater than today.
- The message is a supported file type.

The fields used to control the loading of messages in PCD Planner are listed in *PCD Business Component Calculated Fields*. For information about the user properties that control access visibility for loading messages in PCD Planner, see *User Properties of LS PCD Business Service*.

Availability of Messaging Plans in the PCD Viewer

After the user creates a messaging plan, the messaging plan goes through an approval process. When the messaging plan is approved, the administrator sets the status of the messaging plan as Released and associates a category with it to make it visible to the required users. When you click Detail from the Account Call and Contact Call form applets, the messaging plans are automatically loaded in the PCD Viewer.

Access to the messaging plans depend on the catalog visibility associated to the messaging plans and on the CanLoadInDetailer calculated field in the LS Admin Messaging Plans business component. When making contact calls, messaging plans that have the CanLoadInDetailer field set to Y are available to those users who have catalog visibility.

The CanLoadInDetailer calculated field is set to Y when the messaging plan verification status is Successful. The Successful verification status depends on certain conditions.

All presentation items in the messaging plan must:

- Have a verification status of Successful.
- Be active, that is, the release date of the presentation items must be before or is today's date and is before the expiration date.
- Contain supported file types.

All related messages and detail message content associated with each of the presentation items must:

- Not have inactive messages
- Be the highest, active version

The calculated fields that control the loading of messaging plans in the PCD Viewer and PCD Planner are listed in the table in *PCD Business Component Calculated Fields*. For information about user properties that control access visibility for loading messages in PCD Viewer and PCD Planner, see the table *User Properties of LS PCD Business Service*.

PCD Business Component Calculated Fields

The following table describes the calculated fields that apply to PCD business components.

Calculated Fields for PCD Business Components

Business component	Calculated Field	Values	Description
LS Admin Messaging Plans	CanLoadInDetailer	`IIF (([Max Version Num] = [Version] AND [Product Owner Id] = LoginId() AND [HasInactiveMessages] = "N" AND [IsVerified] = "Y"),'Y','N')`	Messaging plans can be loaded in to the PCD Viewer if the messaging plan: • Is the highest, active version. • Does not have inactive messages. • Is verified.
LS Admin Messaging Plans	CanLoadInPlanner	Y	Load all messaging plans into PCD Planner, that is the Create Messaging Plan window.
LS Admin Messaging Plans	IsVerified	`IIF (Count(VerificationFailedMessages greater than 0,"N","Y")`	If messaging plan has verification failed presentation items, set verification status to failed. That is, IsVerified is equal to N.
LS MP Items	IsVerified	`IIf([Verification Status] = LookupValue('VERIFICATION_ STATUS','Successful') AND [IsSupportedFormat] = "Y" AND [IsRelatedContentVerified] = "Y" AND [IsDetailContentVerified] = "Y",'Y','N')`	If the verification status (obtained from the join to the S_LIT_LSX table) of Message is Successful, and Message is of supported file type, and all the related and detail content associated with this presentation item is verified, then for this presentation item IsVerified is equal to Y.
LS MP Items	IsSupportedFormat	`IIF(([LitFileExt] = 'SWF' OR [LitFileExt] = 'swf' OR [LitFileExt] = 'jpg' OR [LitFileExt] = 'JPG' OR [LitFileExt] = 'GIF' OR [LitFileExt] = 'gif' OR [LitFileExt] = 'png' OR [LitFileExt] = 'PNG'), 'Y','N')`	Checks if the file type of the presentation item is supported.
LS MP Items	IsDetailContentVerified	`IIF (Count(Verified Detail Content) is greater than 0,"N", "Y")`	Checks if all detail content associated with the presentation item is verified.
LS MP Items	IsRelatedContentVerified	`IIF (Count(Verified Related Content) is greater than 0,"N", "Y")`	Checks if all related content associated with presentation item is verified.
LS Detail Messages	IsVerified	`IIf([Verification Status] = LookupValue('VERIFICATION_ STATUS','Successful')AND`	If the verification status (obtained from the join to the S_LIT_LSX table) of Message is Successful, and Message

Business component	Calculated Field	Values	Description
		`[IsSupportedFormat] = "Y" ,'Y', 'N')`	is of supported file type, then for this related item IsVerified is equal to Y.
LS Detail Messages	IsSupportedFormat	`IIF(([LitFileExt] = 'SWF' OR [LitFileExt] = 'swf' OR [LitFileExt] = 'jpg' OR [LitFileExt] = 'JPG' OR [LitFileExt] = 'GIF' OR [LitFileExt] = 'gif' OR [LitFileExt] = 'png' OR [LitFileExt] = 'PNG'), 'Y','N')`	Checks if the file type is supported.
LS Related Messages	IsVerified	`IIf([Verification Status] = LookupValue('VERIFICATION_ STATUS', 'Successful') AND [IsSupportedFormat] = "Y" ,'Y', 'N')`	If the verification status (obtained from the join to the S_LIT_LSX table) of Message is Successful, and Message is of a supported file type, then for this related item, IsVerified is equal to Y.
LS Related Messages	IsSupportedFormat	`IIF(([LitFileExt] = 'SWF' OR [LitFileExt] = 'swf' OR [LitFileExt] = 'jpg' OR [LitFileExt] = 'JPG' OR [LitFileExt] = 'GIF' OR [LitFileExt] = 'gif' OR [LitFileExt] = 'png' OR [LitFileExt] = 'PNG'), 'Y','N')`	Checks if the file type is supported.
Admin Sales Tool	CanLoadInPlanner	`IIF (([Sales Tool Type] = LookupValue ("SALES_TOOL_TYPE", "Message") AND [IsActive] = "Y" AND [IsSupportedFormat] = "Y"), 'Y','N')`	Literature item can be loaded in PCD Planner if: • The type is equal to Message. • Is active (release date is before or is today's date and is before the expiration date). • Is of supported file type.
Admin Sales Tool	CanLoadInDetailer	`IIF (([Sales Tool Type] = LookupValue ("SALES_ TOOL_TYPE", "Message") AND [IsSupportedFormat] = "Y"),'Y', 'N')`	Literature Item can be verified if type is equal to Message and is of supported file type.
Admin Sales Tool	IsSupportedFormat	`IIF(([LitFileExt] = 'SWF' OR [LitFileExt] = 'swf' OR [LitFileExt] = 'jpg' OR [LitFileExt] = 'JPG' OR [LitFileExt] = 'GIF' OR [LitFileExt] = 'gif' OR [LitFileExt] = 'png' OR [LitFileExt] = 'PNG'), 'Y','N')`	Checks if the file type is supported.

About Recommended Messaging Plans

When a sales representative launches the PCD Viewer from the Contact Call Detail View, Account Contact Call View, or Account Call Detail View, all messaging plans available to the sales representative are loaded into the PCD Viewer by Life Sciences (LS) PCD Services. For more information about the user properties for the LS PCS Services, see *User Properties of LS PCD Business Service*.

In LS PCD Service, the OptimizeDetailingPlan method identifies messaging plans that are recommended for the call. These messaging plans are called Recommended Messaging Plans and have an asterisk (a star icon) suffixed to its name in the list of available messaging plans when displayed in the PCD Viewer.

By default, the OptimizedDetailingPlan functionality is configured to identify recommended messaging plans for Contact Call and Account Contact Call detailing only. If Objectives or Offers are associated to a Contact Call or Account Contact Call, recommended messaging plans are identified as outlined in this section.

However, if no Offer or Objective is associated to a Contact Call or Account Contact Call, fields for entering target segments, in the Contact Call or Account Contact Call views are available, and recommended messaging plans can be selected based on these field values.

Similarly, if no Objectives are associated to an Account Call, fields for entering target segments in the Account Call view are available, and recommended messaging plans can be selected based on these field values.

Configuring Target Segment Fields for Contact Call and Account Contact Call Views

The following procedure shows you how to configure target segment fields for the Contact Call or Account Contact Call views.

To configure fields for entering target segments in Contact Call view or Account Contact Call view

1. Add fields in Pharma Professional Call business component (BC) mapping to one or more extension columns in S_EVT_ACT_X. For example:

   Field Name: Call Segment Code 1 Join: S_EVT_ACT_X Column: ATTRIB_01

   Field Name: Call Segment Code 2 Join: S_EVT_ACT_X Column: ATTRIB_02
2. Configure the fields in Pharma Professional Call Form Applet.
3. In the Pharma Professional Call BC, update the BC user property Call Seg Code Fields with a list of segment code fields, with each segment code field separated by a comma. For example, Call Segment Code 1, Call Segment Code 2.

Configuring Target Segment Fields for Account Call View

The following procedure shows you how to configure target segment fields for the Account Call view.

To configure fields for entering target segments in Account Call view

1. Add fields in Pharma Account Call business component (BC) mapping to one or more extension columns in S_EVT_ACT_X.

   For example:

   Field Name: Call Segment Code 1 Join: S_EVT_ACT_X Column: ATTRIB_01

   Field Name: Call Segment Code 2 Join: S_EVT_ACT_X Column: ATTRIB_02
2. Configure the fields in Pharma Account Call Form Applet.
3. In the Pharma Account Call BC, update the BC user property Call Seg Code Fields with a list of segment code fields, with each segment code field separated by a comma. For example, Call Segment Code 1, Call Segment Code 2.

By default, the OptimizedDetailingPlan functionality is not configured to identify recommended messaging plans for Account Call if an Objective is associated to the Account Call.

Configuring Fields For Account Call View When Objectives are Associated With the Account Call

The following procedure shows you how to configure fields for the Account Call view when objectives are associated with the Account Call.

To configure fields for Account Call view when Objectives are associated to an Account Call

1. Create one or more extension columns in S_ACCNT_SRC (for example, X_SEG_CODE1, X_SEG_CODE2) and apply these changes in the Siebel Business Applications database.
2. Add fields in Pharma Campaign Target Account BC and map these fields to the columns created in S_ACCNT_SRC. For example:

   Field Name: Segment Code 1 Join: S_ACCNT_SRC Column: X_SEG_CODE1

   Field Name: Segment Code 2 Join: S_ACCNT_SRC Column: X_SEG_CODE2
3. Configure the fields in Pharma Campaign Target Account List Applet.
4. In the Pharma Account Call BC, update the BC user property Objective Seg Code Fields with a list of segment code fields, with each segment code field separated by a comma. For example, Segment Code 1, Segment Code 2.

Optimize Detailing Plan Method

Signature of the Optimize Detailing Plan method is as follows:

```
ErrCode OptimizeDetailingPlan (const CCFPropertySet& inputArgs, CCFPropertySet& outputArgs)
```

The input parameters to this method are sent as an input property set (inputArgs).

The output of this method is an xml string, set in the output property set (outputArgs) with property name as RecommendedMsgPlans. For example:

```
outputArgs.SetProperty("RecommendedMsgPlans",<xmlstring>);
```

The xml string in the output property set should be in the following format:

```
<OptimizedDetailingPlan>
<ListOfRecommendedMessagingPlans>
<MessagingPlan>
 <Id>
 </Id>
 <SequenceNumber>
 </SequenceNumber>
 <OfferId>
 </OfferId>
 <ObjectiveId>
 </ObjectiveId>
 <SegmentCode>
 </SegmentCode>
 </MessagingPlan>
<MessagingPlan>
 <Id>
 </Id>
 <SequenceNumber>
 </SequenceNumber>
 <OfferId>
 </OfferId>
 <ObjectiveId>
 </ObjectiveId>
 <SegmentCode>
 </SegmentCode>
</MessagingPlan>
</ListOfRecommendedMessagingPlans>
</OptimizedDetailingPlan>
```

You can use your own logic to identify recommended messaging plans by overriding the OptimizeDetailingPlan method using a script.

To override OptimizeDetailingPlan

1. In Siebel Tools, query for LS PCD Service.
2. Right-click LS PCD Service, and click Edit Server scripts.
3. Update the Service_PreInvokeMethod function to override logic for OptimizeDetailingPlan as shown:

```
function Service_PreInvokeMethod (MethodName, Inputs, Outputs)
 {
 if(MethodName == "OptimizeDetailingPlan")
 {
 ……..
 User logic to identify Recommended messaging plans…
 set output property set…
 …..
 return (CancelOperation);
 }
 else
 return (ContinueOperation);
 }
```

Identifying Recommended Messaging Plans

The default OptimizeDetailingPlan method identifies Recommended Messaging Plans. If an objective is selected for a call, the OptimizedDetailinPlan method:

- Provides a list of messaging plans to be loaded to the PCD Viewer based on messaging plans associated with an objective

- Associates a Target Segment Code matching the objective's Contact Target Segment Code fields, that is, one or more fields from S_CAMP_CON table.

> **Note:** The field names from Action BC are configurable. If the Objective Id is null, then the segment code fields (one or more fields from Action BC) are used to match and search for Recommended Messaging Plans based on Target Segment Code field defined for each Messaging Plan.

Scenario for Identifying Recommended Messaging Plans

This scenario gives one example of identifying recommended messaging plans. You might use this feature differently, depending on your business model.

A sales representative (Sales Rep A) has an Objectives set up called Q1 Objective and has Dr. Adler as a target for this objective.

The Target Record of Dr. Adler has two custom extension fields to hold SegCode1 and SegCode2 for two products, A1 and B2, that Sales Rep A deals with.

The Sales Operation Manager has also five messaging plans, namely MP1, MP2, MP3, MP4, and MP5, associated with this Objective and each messaging plan has a Target Segment code specified as A1, B1, A2, B2, and A1.

Sales Rep A creates a call on Dr. Adler and selects Q1 Objective as Objective for the call. The OptimizeDetailingPlan finds matching messaging plans associated with Objective Q1 Objective that have Target Segment code as A1 and B2. This scenario results in MP1,MP4 and MP5 selected as recommended messaging plans.

Next, consider the situation where Sales Rep A creates another call on Dr. Adler and does not select Objective for the call. OptimizeDetailingPlan matches custom extension fields defined on the call business component (BC) to hold segment code values against Target Segment Code fields on the messaging plans to identify recommended messaging plans.

For Contact Calls with Marketing Communications, the LS PCD Service method provides a list of messaging plans to be loaded in the PCD Viewer based on messaging plans associated with Contact Call Offers for which the sales representative has access. For example, if Sales Rep A has access to three Contact Call Offers but is in the Access Group of only one of the messaging plans associated with the Contact Call Offer, then only that messaging plan can be loaded in the PCD Viewer.

Modifying a Tooltip in the PCD Viewer

You can customize the tooltips that are displayed when a user places the cursor over the buttons in the PCD Viewer.

To modify a tooltip in the PCD viewer

1. Navigate to the following folder:

   ```
   <Siebel_Install_Path>\AI\applicationcontainer_external\siebelwebroot\<language folder>\ISDData\<language folder>
   ```

2. Open the lfs.xml file and enter the tooltip string as shown in the following example: `<IDS_NEW_TOOLTIP>New Tooltip </IDS_NEW_TOOLTIP>`

3. Navigate to following folder:

   ```
   <Siebel_Install_Path>\AI\applicationcontainer_external\siebelwebroot\<language folder>
   ```

4. Open the `toolbar_buttons.xml` file and locate the button tag for which tooltip is to be modified.
5. Update the `<TtolTip>` tag for the selected button with the string tag created in `lfs.xml` as follows:

```
<toolbars>
 <toolbar toolbarId="Detailer - Standard" defaultState="DEFAULT" firstChangeInternal="false" buttonId="1">
 <respectStates>
 <toolbar name="Detailer - Standard"/>
 </respectStates>
 <button buttonId="2">
 <label/>
 <toolTip>IDS_NEW_TOOLTIP</toolTip>
 <icon/>
 ……..
 </button>
 </toolbar>
</toolbars>
```

Note: It is not recommended to remove buttons from the toolbar_buttons.xml. However, you can hide buttons by adding the DefaultState value to the ReadOnlyStates tag.

User Properties of the PCD Applets

Siebel business components are based on the CSSBusComp class, or on a C++ class derived from the CSSBusComp class. Business component user properties allow Siebel administrators to control and adjust the behavior of Siebel Life Sciences in the Siebel runtime repository.

The following is a list of PCD applets that display the Flex application user properties. Flex is a third-party application used by PCD:

- LS Admin Edit Messaging Plan
- LS Admin New Messaging Plan
- LS Admin Preview Messaging Plan
- LS Edit Personalized Messaging Plan
- LS Personalize Messaging Plan
- LS Preview Messaging Plan
- LS Verify Message

The following table describes the user properties that apply to PCD popup applets that display Flex UI elements.

Name	Value	Description
FlexAppMode	MP-Admin	The Flex application launches PCD in the modes that determine the UI. For example, for preparing for a contact call, PCD is launched in ISDPreview mode. For message plan creation, the MP-Admin mode is launched.

Name	Value	Description
		Note: Do not modify this user property.
InitMethod	EditMsgPlan	The method name in LS PCD Service that initializes the Flex application. **Note:** Do not modify this user property.
IntegrationObj	AdminMessagingPlanIO	Specifies the I/O (input/output) to be used for writing data to the database. For example, data is sent in XML format. **Note:** Do not modify this user property.
CallIOBS	Pharma Account Call IO BS	Name of the business service that executes the I/O for extracting call data.
CallType	Account Call Contact Call	Specifies the type of call.

User Properties of LS PCD Business Service

The following table describes the user properties that apply to Life Sciences (LS) PCD Services.

Name	Value	Description
LoadLOVTypes	PCD_RESPONSE_TYPE MSG_PLAN_ITEM_TYPE VERIFICATION_STATUS MSG_DISPLAY_STATUS	Specifies the LOV type values that are extracted and sent to the Flex application. **Note:** Do not modify this user property.
SyncEndConfirmation	Y	If you click Uncompress, an asynchronous process starts and decompresses the messages. At the end of this decompression process, if the value of this user property is equal to Y, then the Siebel Business Application displays a message box to confirm the end of the decompression process. However, this user property value is ignored by

Name	Value	Description
		the Siebel Server and no confirmation message dialog is displayed.
SyncStartConfirmation	Y	If you click Uncompress, an asynchronous process starts and decompresses the messages. At the start of this decompression process, if the value of this user property is equal to Y then the Siebel Business Application displays a message box to confirm the start of the decompression process. However, this user property value is ignored by the Siebel Server and no confirmation message dialog is displayed.
Verify Disabled Error Msg	Verification cannot be done for this Literature Record	In the Administration - Document screen, then the Literature view, verification is done only on literature records with type equal to Message. For records of type Message, clicking Verify displays the error message specified in this user property.
No Messaging Plan Error Msg	No Messages Available for Detail	In Account Call and Contact Call form applets, if there are no messaging plans available, clicking Detail displays the error message specified in this user property.
ViewModeForLoadingMPlnDetailer	Catalog	Specifies the access type to be used for loading messaging plans in the PCD Viewer.
ViewModeForLoadingMsgInPlanner	Catalog	Specifies the access type to be used for loading messages in PCD Planner.

API for Using Multi-file Content

The message can access its component files in the main Flex content by making a call to the getMessageFileName(filename) application programming interface (API).

The parameter filename must be the filename of the component file in the Siebel Business Application. The Siebel Business Application returns the path of the component file. The message can then use the component file path to add additional component files to the PCD content.

For example, to access and load component files, the main message must call the following functions:

```
 Application.application.getMessageFileName(fileName); if using Flex for content
creation
```

The syntax for childData API is as follows:

```
getMessageFileName(filename:String):void
```

API for Recording Section Data

PCD Viewer tracks various information such as the duration for which each message (digital content) in a messaging plan was presented. It does this by recording the timestamp when the presentation of a message started and the timestamp when the presentation of the message ended.

The message (digital content) performs additional tracking and make calls to the PCD Viewer to pass tracking information. The PCD Viewer takes the combined information and make calls to Siebel Business Application to write back presentation data.

For example, consider a message that has three critical sections where the start and end time of each section needs to be tracked along with start and end time of the entire message. To track section data. the message must pass the section's tracking information to the PCD Viewer by calling the following function, if using Flex for content creation:

```
Application.application.childData(sectionName, startTime, endTime);
```

The syntax for childData API is as follows:

```
childData(name:String, start:Date, end:Date):void
```

When you close the PCD Viewer, data is written to the presentation detail applet. You can view the full section by section record of messages as shown in the example in the following table.

Message Name	Section Name	Messaging Plan Name	Start Name	End Name
Samp1	None	SampMP	7:30 pm	7:45 pm
Samp1	Sec1	SampMP	7:31 pm	7:35 pm
Samp1	Sec2	SampMP	7:36 pm	7:40 pm
Samp1	Sec3	SampMP	7:41 pm	7:45 pm

Pharma Service User Properties

This section includes:

- *LS Pharma Validation Service User Properties*
- *LS Pharma Validation Service CE User Properties*
- *LS Pharma Call Utility Service User Properties*
- *LS Pharma Smart Call Template User Properties*
- *LS Pharma Sample Transaction Admin Service User Properties*
- *LS Pharma Inventory Period Service User Properties*

- *LS Pharma Inventory Administration Service User Properties*

LS Pharma Validation Service User Properties

The following table describes the the user properties that apply to LS Pharma Validation service.

Name	Value	Description
Account BC	Account	Shows the name of BC that represents Account entity, used by Validation engine to get Account Details. The default value is Account.
Account Call BC	Pharma Account Call	Shows the name of BC that represents Account Call entity, used by Validation engine to validate Account calls.
Account Contact Call BC	Pharma Professional Call	Shows the name of BC that represents Account Contact Call entity, used by Validation engine to validate Account calls.
Contact BC	Contact	Shows the name of BC that represents Contact entity, used by Validation engine to get Contact Details. The default value is Contact.
DEA Expiry Date Field	DEA Expr	Shows the name of the field that stores DEA number Expiry date.
DEA Number Field	DEA#	Shows the name of the field that stores DEA number.
Employee BC	Employee	Shows the name of BC that represents Employee entity, used by Validation engine to get employee details. The default value is Employee.
Enable Auto Set Call Type	Y	Turns on or off the auto-setting Call Type in Call BC, when Validation is done.
Enable Lot Cutoff Validation Sub Rule	LOT CUTOFF SUB RULE, Y	Shows Lot # cutoff rule on current Call. The first part of the rule is Rule name used to get error message from Message Category. The second part of the rule turns on or off the rule, while the third part of the rule displays an error, warn, or ignore message.
Enable Lot Validation Sub Rule	LOT VALID SUB RULE, Y	Determines if dropped sample is not expired in current Call. The first part of the rule is Rule name used to get error message from Message Category. The second part of the rule turns on or off the rule, while the third part of the rule displays an error, warn, or ignore message.
Enable Max Samples Per Allocation Period Sub Rule	MAX PER ALLOC PERIOD SUB RULE, Y, WARNING	Validates Quantity Dropped in call Allocated to Sales Rep in active period. The first part of the rule is Rule name used to get error message from Message Category. The second part of the rule turns on or off the rule, while the

Name	Value	Description
		third part of the rule displays an error, warn, or ignore message.
Enable Max Samples Per Call Sub Rule	MAX PER CALL SUB RULE, Y, WARNING	Validates Quantity Dropped in call for Maximum per call in active period. The first part of the rule is Rule name used to get error message from Message Category. The second part of the rule turns on or off the rule, while the third part of the rule displays an error, warn, or ignore message.
Enable One Time Sampling Sub Rule	Y	To allow one time sampling to Contact with InActive but Not expired license.
Enable Stop Sampling Sub Rule	STOP SAMPLE SUB RULE, Y	The first part of the rule is Rule name used to get error message from Message Category. The second part of the rule turns on or off the rule, while the third part of the rule displays an error, warn, or ignore message.
License Expiry Date Field	License Expiry Date	The name of the field that stores License Expiry Date.
License Number Field	License Number	The name of the field that stores the License Number.
License Status Field	License Status	The name of the field that stores the License Status.
Log Level	1- Error, 2- Error and Warning 3 Error, warning and ignore/success	Indicates level while logging validation results.
Pharma Personal Samples BC	Pharma Personal Samples List	The name of BC for Sales Reps personal samples.
Products Detailed BC	Pharma Call Products Detailed	The name of BC for products detailed in Pharma call.
Professional Call BC	Pharma Professional Call	The name of BC for Contact call BC and Account contact call BC.
Promotional Items BC	Pharma Promotional Items Dropped	The name of BC for Promotional items dropped in Pharma call.
Required Fields To Submit: Account Call	<..., ..., ..., ... >	The names of Fields separated with comma, required to submit Account Call.
Required Fields To Submit: Professional Call	<..., ..., ..., ... >	The names of Fields separated with comma, required to submit Contact Call.
SRE PT Exception - DEA: Nurse Practitioner	NJ|	For each professional exception, the State names where Profession types that can be sampled with DEA number (state names before pipe (|)), or with out DEA number (state names after pipe).

Name	Value	Description
SRE PT Exception - License: Nurse Practitioner	NJ|	For each professional exception, the State names where Profession types that can be sampled with License number (state names before pipe (|)) or with out License number (state names after pipe).
SRE Professional Types	Physician	The profession Types allowed to be sampled in all States with Valid License or DEA Number.
Samples Dropped BC	Pharma Call Sample Dropped	The name of BC for Samples dropped in Pharma call.
Valid License Status	Active	Indicates valid status value of License Number.
Validate Lot# Field	Lot Expiry Date	The Name of Field for Lot Expiry date, that is to be verified in Lot expiry verification.
Validation Results BC	LS Pharma Call Validation Results	The name of BC for inserting call validation results.
Validation Rule 1	LICENSE EXPIRATION RULE, 1, IsLicenseExpired, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • LICENSE EXPIRATION RULE - calls the License Expiry Rule. • 1 - validate during sign. • IsLicenseExpired - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 10	CONTACT SAMPLING RULE, 1, IsValidProfToSample, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • CONTACT SAMPLING RULE - calls the Contact to be Sampled rule. • 1 - validate during sign. • IsValidProfToSample - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 11	PRODUCT PRIORITY RULE, 6, AreProdDetailedValid, ERROR, 5 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • PRODUCT PRIORITY RULE - calls the Product Detail Priorities rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • AreProdDetailedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Attendee Calls.

Name	Value	Description
Validation Rule 12	MUST DETAIL RULE, 6, AreProductsDetailed, ERROR, 5 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • MUST DETAIL RULE - calls the Must Detail rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • AreProductsDetailed - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Account Calls.
Validation Rule 13	MUST DISBURSE RULE, 1, AreSamplesDropped, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • MUST DISBURSE RULE - calls the Must Disburse rule. • 1 - validate during sign. • AreSamplesDropped - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 14	REQUIRED FIELDS RULE, 6, ValidateReqFields, ERROR, 5 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • REQUIRED FIELDS RULE - calls the Required fields to submit rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • ValidateReqFields - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Account Calls.
Validation Rule 15	CALL DATE RULE, 7, IsValidCallDate, ERROR, 7 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • CALL DATE RULE - calls the Call Date rule. • 7 - validate always. • IsValidCallDate - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 7 - rule is applicable to all Calls.
Validation Rule 16	REFERENCE NUMBER RULE, 6, ValidateSampRefNum, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • REFERENCE NUMBER RULE - calls the Valid Reference Number rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • ValidateSampRefNum - method name to be invoked.

Name	Value	Description
		• ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 17	SRE PROFESSIONAL RULE, 1, IsValidSREProfType, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • SRE PROFESSIONAL RULE - calls the SRE Professional Type rule. • 1 - validate during sign. • IsValidSREProfType - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 18	SAMPLES REQUEST VALIDATION RULE, 7, AreSamplesRequestedValid, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • SAMPLES REQUEST VALIDATION RULE - calls the Samples Requested Validation rule. • 7 - validate always. • AreSamplesRequestedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 19	PROMOTIONAL ITEMS RULE, 7, ArePromoItemsDroppedValid, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • PROMOTIONAL ITEMS RULE - calls the Promotional Items dropped validation rule. • 7 - validate always. • ArePromoItemsDroppedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 2	SUBMIT BY POSITION RULE, 7, IsValidPositionToSubmit, ERROR, 7 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • SUBMIT BY POSITION RULE - calls the position Validation Rule rule. • 7 - validate always. • IsValidPositionToSubmit - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 7 - rule is applicable to all Calls.
Validation Rule 3	LICENSE RULE,1, IsValidLicenseNumber, ERROR, 3	Values include:

Name	Value	Description
	For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	• LICENSE RULE - calls the License Number rule. • 1 - validate during sign. • IsValidLicenseNumber - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 4	LICENSE STATUS RULE, 1, IsValidLicenseStatus, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • LICENSE STATUS RULE - calls the License Status rule. • 1 - validate during sign. • IsValidLicenseStatus - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 5	PROFESSIONAL PROFILE RULE, 1, IsValidProfProfile, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • PROFESSIONAL PROFILE RULE - calls the Contact Profile rule. • 1 - validate during sign. • IsValidProfProfile - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 6	EMPLOYEE SAMPLING RULE, 1, IsValidEmpToSample, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • EMPLOYEE SAMPLING RULE - calls the Employee to Sample rule. • 1 - validate during sign. • IsValidEmpToSample - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 7	DEA RULE, 1, IsValidDEANumber, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • DEA RULE - calls the DEA Number rule. • 1 - validate during sign. • IlsValidDEANumber - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.

Name	Value	Description
Validation Rule 8	DEA EXPIRATION RULE, 1, IsDEAExpired, ERROR, 3 For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • DEA EXPIRATION RULE - calls the DEA Expiry rule. • 1 - validate during sign. • IsDEAExpired - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 9	SAMPLES VALIDATION RULE, 1, AreSamplesDroppedValid, ERROR, 3For more information, see *Format for Validation Rule N User Propertyin LS Pharma Validation Service*.	Values include: • SAMPLES VALIDATION RULE - calls the DEA Number rule. • 1 - validate during sign. • AreSamplesDroppedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validator Type	Pharma Call	Type of Validation done by Validation engine. Currently, only Pharma Call type supported.

Format for Validation Rule N User Property in LS Pharma Validation Service

Each Validation Rule can have a maximum of 5 components, where the rule name is mandatory. A description of each component in the Validation Rule follows:

- **Rule Name.** Rule Names, which are mandatory, are defined in the List of Values. The LOV type is LS_VALIDATION_RULE_NAME.
- **Number indicating when to apply the rule.** The number indicates when to process the rule, and depends on the Call Status as follows:
  - If the value is 1, then the rule is evaluated if the call is not signed (that is, for electronic signatures).
  - If the value is 2, then the rule is evaluated for Paper Signed calls upon call submit.
  - If the value is 4, then the rule is evaluated for Electronically Signed calls upon call submit.
  - If the value is 6, then the rule is evaluated for both Paper and Electronically Signed calls upon call submit.
  - If the value is 7, then the rule is evaluated whenever call validation is carried out.
- **Method Name.** The name of the method that is called to validate the rule. Each rule that is supported by default has an associated method. If customers want to override the existing validation rule or create a new rule, then they can do so. If overriding the existing rule, then the method name must be changed to a different value. Customers can choose to leave the method name blank or they can enter a different value for the method name. If a new rule is created, then a new user property must be defined according to the rule format.
- **Type of failure message.**The type of the message that must be logged when the validation rule fails. This can be an ERROR or a WARNING. If the validation is successful, then a message of type SUCCESS is logged. If the rule does not apply to the current call, then a message of type IGNORE is logged.

- Type of Call. The type of the call to which the rule applies:
  - If the value is 1, then the rule applies to Contact Calls.
  - If the value is 2, then the rule applies to Attendee Calls.
  - If the value is 4, then the rule applies to Account Calls.
  - If the value is 3, then the rule applies to Contact and Attendee Calls.
  - If the value is 5, then the rule applies to Contact and Account Calls.
  - If the value is 6, then the rule applies to Attendee and Account Calls.
  - If the value is 7, then the rule applies to Contact, Attendee, and Account Calls.

LS Pharma Validation Service CE User Properties

The following table describes the user properties that apply to LS Pharma Validation Service CE.

Name	Value	Description
Account BC	Account	The name of BC that represents Account entity, used by Validation engine to get Account Details. The default value is Account.
Account Call BC	Pharma Account Call	The name of BC that represents Account Call entity, used by Validation engine to validate Account calls.
Account Contact Call BC	Pharma Professional Call	The name of BC that represents Account Contact Call entity, used by Validation engine to validate Account calls.
Contact BC	Contact	The name of BC that represents Contact entity, used by Validation engine to get Contact Details. Defaults to Contact.
DEA Expiry Date Field	DEA Expr	The Name of the field that stores DEA number Expiry date.
DEA Number Field	DEA#	The name of the field that stores DEA number.
Employee BC	Employee	The name of BC that represents Employee entity, used by Validation engine to get employee details. Default to Employee.
Enable Auto Set Call Type	Y	Turns on or off auto-setting Call Type in Call BC, when Validation is done.
Enable Lot Cutoff Validation Sub Rule	LOT CUTOFF SUB RULE, Y	To see Lot # cutoff rule on current Call. First part of rule is Rule name used to get error message from Message Category. Second part states to turn On or Off the rule, while the third part of the rule is to Error, Warn, or Ignore.

Name	Value	Description
Enable Lot Validation Sub Rule	LOT VALID SUB RULE, Y	To see dropped sample is not expired in current Call. First part of rule is Rule name used to get error message from Message Category. Second part states to turn On or Off the rule, while the third part of the rule is to Error, Warn, or Ignore.
Enable Max Samples Per Allocation Period Sub Rule	MAX PER ALLOC PERIOD SUB RULE, Y, WARNING	To Validate Quantity Dropped in call is crossing Allocated to Sales Rep in active period. First part of rule is Rule name used to get error message from Message Category. Second part states to turn On or Off the rule, while the third part of the rule is to Error, Warn, or Ignore.
Enable Max Samples Per Call Sub Rule	MAX PER CALL SUB RULE, Y, WARNING	To Validate Quantity Dropped in call is crossing Maximum per call in active period. First part of rule is Rule name used to get error message from Message Category. Second part states to turn On or Off the rule, while the third part of the rule is to Error, Warn, or Ignore.
Enable One Time Sampling Sub Rule	Y	To allow One time sampling to Contact with InActive but Not expired license.
Enable Stop Sampling Sub Rule	STOP SAMPLE SUB RULE, Y	First part of rule is Rule name used to get error message from Message Category. Second part states to turn On or Off the rule, while the third part of the rule is to Error, Warn, or Ignore.
License Expiry Date Field	License Expiry Date	The name of the field that stores License Expiry Date.
License Number Field	License Number	The name of the field that stores the License number.
License Status Field	License Status	The name of the field that stores the license Status.
Log Level	1-error, 2-error and Warning, 3- error, warning and ignore/success	Indicates level while logging validation results.
Pharma Personal Samples BC	Pharma Personal Samples List	The name of BC for Sales Reps personal samples.
Products Detailed BC	Pharma Call Products Detailed	The name of BC for products detailed in Pharma call.
Professional Call BC	Pharma Professional Call	The name of BC for Contact call BC and Account contact call BC.
Promotional Items BC	Pharma Promotional Items Dropped	The name of BC for Promotional items dropped in Pharma call.
Required Fields To Submit: Account Call	<..., ..., ..., ... >	The names of Fields separated with comma, required to submit Account Call.

Name	Value	Description
Required Fields To Submit: Professional Call	<..., ..., ..., ... >.	The names of Fields separated with comma, required to submit Contact Call.
SRE PT Exception - DEA: Nurse Practitioner	NJ|	The State names where Profession types that can be sampled with DEA number (state names before pipe (|)) or with out DEA number (state names after pipe).
SRE PT Exception - License: Nurse Practitioner	NJ|	The State names where Profession types that can be sampled with License number (state names before pipe (|)) or with out License number (state names after pipe).
SRE Professional Types	Physician	The profession Types allowed to be sampled in all States with Valid License and or DEA Number.
Samples Dropped BC	Pharma Call Sample Dropped	The name of BC for Samples dropped in Pharma call.
Valid License Status	Active	Indicates valid status value of License Number.
Validate Lot# Field	Lot Expiry Date	The Name of Field for Lot Expiry date, that is to be verified in Lot expiry verification.
Validation Results BC	LS Pharma Call Validation Results	The name of BC for inserting call validation results.
Validation Rule 1	LICENSE EXPIRATION RULE, 1, IsLicenseExpired, ERROR, 3	Values include: • LICENSE EXPIRATION RULE - calls the License Expiry rule. • 1 - validate during sign. • IsLicenseExpired - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 10	CONTACT SAMPLING RULE, 1, IsValidProfToSample, ERROR, 3	Values include: • CONTACT SAMPLING RULE - calls the Contact to be Sampled rule. • 1 - validate during sign. • IsValidProfToSample - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 11	PRODUCT PRIORITY RULE, 6, AreProdDetailedValid, ERROR, 5	Values include:

Name	Value	Description
		• PRODUCT PRIORITY RULE - calls the Product Detail Priorities rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • AreProdDetailedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Account Calls.
Validation Rule 12	MUST DETAIL RULE, 6, AreProductsDetailed, ERROR, 5	Values include: • MUST DETAIL RULE - calls the Must Detail rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • AreProductsDetailed - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Account Calls.
Validation Rule 13	MUST DISBURSE RULE, 1, AreSamplesDropped, ERROR, 3	Values include: • MUST DISBURSE RULE - calls the Must Disburse rule. • 1 - validate during sign. • AreSamplesDropped - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 14	REQUIRED FIELDS RULE, 6, ValidateReqFields, ERROR, 5	Values include: • REQUIRED FIELDS RULE - calls the Required fields to submit rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • ValidateReqFields - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 5 - rule is applicable to Contact and Account Calls.
Validation Rule 15	CALL DATE RULE, 7, IsValidCallDate, ERROR, 7	Values include: • CALL DATE RULE - calls the Call Date rule. • 7 - validate always. • IsValidCallDate - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message.

Name	Value	Description
		• 7 - rule is applicable to all Calls.
Validation Rule 16	REFERENCE NUMBER RULE, 6, ValidateSampRefNum, ERROR, 3	Values include: • REFERENCE NUMBER RULE - calls the Valid Reference Number rule. • 6 - validate for Paper Signed or Electronic Signed calls at submit time. • ValidateSampRefNum - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 17	SRE PROFESSIONAL RULE, 1, IsValidSREProfType, ERROR, 3	Values include: • SRE PROFESSIONAL RULE - calls the SRE Professional Type rule. • 1 - validate during sign. • IsValidSREProfType - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 18	SAMPLES REQUEST VALIDATION RULE, 7, AreSamplesRequestedValid, ERROR, 3	Values include: • SAMPLES REQUEST VALIDATION RULE - calls the Samples Requested Validation rule. • 7 - validate always. • AreSamplesRequestedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 19	PROMOTIONAL ITEMS RULE, 7, ArePromoItemsDroppedValid, ERROR, 3	Values include: • PROMOTIONAL ITEMS RULE - calls the Promotional Items dropped validation rule. • 7 - validate always. • ArePromoItemsDroppedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 2	SUBMIT BY POSITION RULE, 7, IsValidPositionToSubmit, ERROR, 7	Values include: • SUBMIT BY POSITION RULE - calls the position Validation Rule rule.

Name	Value	Description
		• 7 - validate always. • IsValidPositionToSubmit - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 7 - rule is applicable to all Calls.
Validation Rule 3	LICENSE RULE,1, IsValidLicenseNumber, ERROR, 3	Values include: • LICENSE RULE - calls the License Number rule. • 1 - validate during sign. • IsValidLicenseNumber - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 4	LICENSE STATUS RULE, 1, IsValidLicenseStatus, ERROR, 3	Values include: • LICENSE STATUS RULE - calls the License Status rule. • 1 - validate during sign. • IsValidLicenseStatus - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 5	PROFESSIONAL PROFILE RULE, 1, IsValidProfProfile, ERROR, 3	Values include: • PROFESSIONAL PROFILE RULE - calls the Contact Profile rule. • 1 - validate during sign. • IsValidProfProfile - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 6	EMPLOYEE SAMPLING RULE, 1, IsValidEmpToSample, ERROR, 3	Values include: • EMPLOYEE SAMPLING RULE - calls the Employee to Sample rule. • 1 - validate during sign. • IsValidEmpToSample - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.

Name	Value	Description
Validation Rule 7	DEA RULE, 1, IsValidDEANumber, ERROR, 3	Values include: • DEA RULE - calls the DEA Number rule. • 1 - validate during sign. • IsValidDEANumber - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 8	DEA EXPIRATION RULE, 1, IsDEAExpired, ERROR, 3	Values include: • DEA EXPIRATION RULE - calls the DEA Expiry rule. • 1 - validate during sign. • IsDEAExpired - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validation Rule 9	SAMPLES VALIDATION RULE, 1, AreSamplesDroppedValid, ERROR, 3	Values include: • SAMPLES VALIDATION RULE - calls the DEA Number rule. • 1 - validate during sign. • AreSamplesDroppedValid - method name to be invoked. • ERROR - default value displays an error, warn, or ignore message. • 3 - rule is applicable to Contact and Attendee Calls.
Validator Type	Pharma Call	Type of Validation done by Validation engine. For future use. Currently, Pharma Call type is only supported.

LS Pharma Call Utility Service User Properties

The following table describes the user properties that apply to LS Pharma Call utility service.

Name	Value	Description
DrillDownView:Account Call 1	LS Pharma Account Call Detail Execute View	Name of the View to Navigate depend on the User property for Accounts.
DrillDownView:Accounts Contacts Call 1	LS Pharma Accounts Contacts Call Detail Execute View	Name of the View to Navigate depend on the User property for Account Contacts.

Name	Value	Description
DrillDownView:Clinical Call 1	Clinical Trip Report Detail View	Name of the View to Navigate depend on the User property for Clinical Trip Report.
DrillDownView:Contact Call 1	LS Pharma Contact Call Detail Execute View	Name of the View to Navigate depend on the User property for Contacts.
DrillDownView:New Meeting	Pharma Meeting Activities View	Name of the View to Navigate depend on the User property for Meeting.

LS Pharma Smart Call Template User Properties

The following table desccribes the the user properties that apply to LS Pharma Smart Call templates.

Name	Value	Description
Best Lot BC Name	LS Pharma My Sample Lots List	Name of the Best Lot BC.
Call Level Template Components	Pharma Call Products Detailed, Pharma Promotional Items Dropped, Pharma Activity Decision Issue, Pharma Call Sample Dropped, LS Pharma Samples Request BC	Used to list the BusComp names. The record gets copied over from the Smart Call template view BusComps to the Call detail view BusComps that are specified in this user property. BusComp names should be separated by comma.
Call Level Template Fields	Comment Associated Cost	Used to list the field names. Only the fields that are specified in this user property gets copied over from the Pharma Template Call BC to Pharma Professional Call BC. Field names should be separated by comma.
Child BusComp Call Detail	Pharma Call Products Detailed	Holds the name of the Product Detail BusComp.
Child BusComp Sample Drop	Pharma Call Sample Dropped	Holds the name of the Promotional Item BusComp.
Child BusComp Sample Request	LS Pharma Samples Request BC	Holds the name of the Sample Request BusComp.
LS Pharma Samples Request BC Template Fields	Product Allocation Id, Name, Quantity	Used to list the names of the fields that are to be copied from the Sample Request BC of Smart Call view to Sample Request BC of Call detail view. The field names should be separated by comma.
Parent Call BusComp Name	Pharma Professional Call	Holds the name of the Parent Call BusComp.

Name	Value	Description
Pharma Call Products Detailed Template Fields	Product Allocation Id, Name, Priority, Indication, Product Issue	Used to list the names of the fields that are to be copied from the Product Detail BC of Smart Call view to Product Detail BC of Call detail view. The field names should be separated by comma.
Pharma Call Sample Dropped Template Fields	Product Allocation Id, Name, Lot Name, Quantity	Used to list the names of the fields that are to be copied from the Sample Drop BC of Smart Call view to Sample Drop BC of Call detail view. The field names should be separated by comma.
Pharma Promotional Items Dropped Template Fields	Product Allocation Id, Name, Quantity	Used to list the names of the fields that are to be copied from the Promo Item BC of Smart Call view to Promo Item BC of Call detail view. The field name should be separated by comma.
Pharma Smart Call Template BC Name	Pharma Template Call	Name of the Pharma Smart Call Template BC.
Pharma Smart Call Template BO Name	Pharma Template Call	Name of the Pharma Smart Call Template BO.
Product Allocation BO Name	Pharma Personal Products & Samples	Holds the name of the Product Allocation BO name.
Product Allocation Detail BC Name	Pharma Personal Products List	Holds the name of the Product Allocation Detail BusComp name.
Product Detail Fld Name	Is Detail Active	Holds the name of the field, which is used to construct the search specification to find out if the Products are active during creation of a call.
Promo Item Dropped SearchSpec Fld Name	Is Promo Item Active	Holds the name of the field, which is used to construct the search specification to find out if the Promo Items are active during creation of a call.
Required Fields on Best Lot BC	Lot Name, Lot Id, Lot Expiry Date	List of fields that needs to be set on LS Pharma My Sample Lots List BC. Lot Name, Lot Id, and Lot Expiry Date are the mandatory fields that needs to be set. Do not change.
Sample Dropped SearchSpec Fld Name	Is Sample Active	Holds the name of the field, which is used to construct the search specification, to find out if the Samples are active during creation of a call.
Sample Request SearchSpec Fld Name	Is Sample Request Active	Holds the name of the field, which is used to construct the search specification, to find out

Name	Value	Description
		if the sample requests are active during the creation of a call.
Set Smart Call Priority	N	If this user property is set to Y, use the priorities coming from the Smart Call. By default, this user property is set to N.

LS Pharma Sample Transaction Admin Service User Properties

The following table describes the the user properties that apply to LS Pharma Sample Transaction administration service.

Name	Value	Description
Business Object	LS Pharma Sample Transactions	Name of Business Object for Sample Transaction Administration.
Personal Inventory BC	LS Pharma Personal Inventory	Name of Personal Inventory Business Component for Sample Transaction Administration.
Pharma Call BC	Pharma Professional Call	Name of Pharma Call Business Component Sample Transaction Administration.
Pharma Professional Call BC	Pharma Professional Call	Name of Pharma Professional Call Business Component Sample Transaction Administration.
Sample Drop BC	Pharma Call Sample	Name of Pharma Sample Drop Business Component Sample Transaction Administration.
Sample Transaction BC	LS Pharma Sample Transactions	Name of Pharma Sample Transaction Business Component Sample Transaction Administration.
Sample Transaction Item BC	LS Pharma Sample Transaction History Item	Name of Pharma Sample Transaction Item Business Component Sample Transaction Administration.
Sample Transaction Transfer In Item BC	LS Pharma Sample Transfer In Item	Name of Pharma Professional Call Business Component Sample Transaction Administration.

LS Pharma Inventory Period Service User Properties

The following table describes the user properties that apply to LS Pharma Inventory Period service.

Name	Value	Description
Count: Business Object	LS Pharma Inventory Audit Reports	Name of Inventory Audit Report Business Object for Inventory Count.
Count: Inventory Audit Report BC	LS Pharma Inventory Audit Report	Name of Inventory Audit Report Business Component for Inventory Count.
Count: Inventory Period BC	LS Pharma Inventory Period	Name of Inventory Period Business Component for Inventory Count.
Count: Personal Inventory BC	LS Pharma Personal Inventory	Name of Personal Inventory Business Component for Inventory Count.
Reconciliation: Business Object	LS Pharma Inventory Audit Reports	Name of Business Object for Reconciliation.
Reconciliation: Inventory Period BC	LS Pharma Inventory Period	Name of Inventory Period Business Component for Reconciliation.

LS Pharma Inventory Administration Service User Properties

The following table describes the user properties that apply to LS Pharma Inventory Administration service.

Name	Value	Description
Approval required: Close Out Count	N	Set this flag to Y or N to allow or disallow approval process for Close Out Inventory Count.
Approval required: Disbursement	Y	Set this flag to Y or N to allow or disallow the approval process for Disbursement Adjustment.
Approval required: Interim Count	N	Set this flag to Y or N to allow or disallow the approval process for Interim Inventory Count.
Approval required: Inventory Adjustment	Y	Set this flag to Y or N to allow or disallow the approval process for Inventory Adjustment.
Approval required: Location Inspection	Y	Set this flag to Y or N to allow or disallow the approval process for Location Audit.
Approval required: Lost	Y	Set this flag to Y or N to allow or disallow the approval process for Sample Lost Adjustment.
Approval required: Transfer In	Y	Set this flag to Y or N to allow or disallow the approval process for Received Samples adjustment.

Name	Value	Description
Approval required: Transfer Out	Y	Set this flag to Y or N to allow or disallow the approval process for Sent Samples Adjustment.
Inventory Period Admin: Audit Report BC	LS Pharma Audit Reports	Name of Audit Report Business Component for Inventory Administration.
Inventory Period Admin: Audit Report Item BC	LS Pharma Audit Report Item	Name of Audit Report Item Business Component for Inventory Administration.
Inventory Period Admin: Business Object	LS Pharma Audit Reports	Name of Audit Report Business Object for Inventory Administration.
Inventory Period Admin: Inventory Audit Report BC	LS Pharma Inventory Audit Report	Name of Inventory Audit Report Business Component for Inventory Administration.
Inventory Period Admin: Inventory Period BC	LS Pharma Inventory Period	Name of Inventory Period Business Component for Inventory Administration.
Inventory Period Admin: Personal Inventory BC	LS Pharma Personal Inventory	Name of Personal Inventory Business Component for Inventory Administration.
Inventory Period Admin: Transaction Item History BC	LS Pharma Sample Transaction History Item	Name of Sample Transaction Item Business Component for Inventory Administration.
Signature required: Close Out Count	Y	Set this flag to Y or N to allow or disallow the signature requirement for Close Out Inventory Count.
Signature required: Disbursement	Y	Set this flag to Y or N to allow or disallow the signature requirement for Disbursement Adjustment.
Signature required: Interim Count	Y	Set this flag to Y or N to allow or disallow the signature requirement for the Interim Inventory Count.
Signature required: Inventory Adjustment	Y	Set this flag to Y or N to allow or disallow the signature requirement for Inventory Adjustment.
Signature required: Location Inspection	Y	Set this flag to Y or N to allow or disallow the signature requirement for the Location Audit.
Signature required: Lost	Y	Set this flag to Y or N to allow or disallow the signature requirement for the Sample Lost Adjustment.
Signature required: Transfer In	Y	Set this flag to Y or N to allow or disallow the signature requirement for Received Samples adjustment.

Name	Value	Description
Signature required: Transfer Out	Y	Set this flag to Y or N to allow or disallow the signature requirement for Sent Samples Adjustment.

Siebel Pharma Business Component User Properties

Siebel Pharma uses the following business component user properties:

- *CSSBCActivity Class Business Component User Properties*
- *CSSBCPharmaCall Class Business Component User Properties*
- *LS Pharma Audit Signature BC User Properties*
- *LS Pharma Call Products Detailed Alloc VBC User Properties*
- *LS Pharma Call Products Detailed VBC - CE User Properties*
- *LS Pharma Call Promotional Items Dropped VBC - CE User Properties*
- *LS Pharma Call Samples Dropped Alloc VBC User Properties*
- *LS Pharma Call Samples Dropped VBC - CE User Properties*
- *LS Pharma Call Samples Requested VBC - CE User Properties*
- *LS Pharma Call Signature Audit BC User Properties*
- *LS Pharma Contact Assessment Attribute - CE BC User Properties*
- *LS Pharma Contact Assessment Template - CE BC User Properties*
- *LS Pharma Disclaimer Rule Set BC User Properties*
- *LS Pharma Inventory Audit Report BC User Properties*
- *LS Pharma Inventory Period User Properties*
- *LS Pharma Location Audit Report BC User Properties*
- *LS Pharma Promotional Items Dropped Alloc VBC User Properties*
- *LS Pharma Samples Request BC User Properties*
- *LS Pharma Samples Request VBC User Properties*
- *LS Pharma Personal Inventory BC User Properties*
- *LS Pharma Sample Received History Item BC User Properties*
- *LS Pharma Sample Transaction History Item BC User Properties*
- *LS Pharma Sample Transactions BC User Properties*
- *LS Pharma Sample Transactions Attachment BC User Properties*
- *LS Pharma Sample Transfer In Item BC User Properties*
- *LS Pharma Samples Attachment BC User Properties*
- *LS Pharma Sample Txn Signature BC User Properties*
- *Pharma Account Call BC User Properties*
- *Pharma Call Products Detailed - CE BC User Properties*

- *Pharma Call Products Detailed - CE User Properties*
- *Pharma Call Sample Dropped - CE User Properties*
- *Pharma Call Samples Requested - CE User Properties*
- *Pharma GA Call Products Detailed User Properties*
- *Pharma Professional Call BC User Properties*
- *Pharma Professional Call - CE BC User Properties*
- *Pharma Promotional Items Dropped - CE User Properties*
- *Action BC User Properties*

CSSBCActivity Class Business Component User Properties

The following table describes the user properties that are related to the Action (class CSSBCActivity) and Calendar (class CSSBCCalendar) business components.

User Property Name	User Property Value	Description
Read-only Activity Types	*,ActivityType1,Activity Type2,...,* 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	*,field1,field2,...,* 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	*Field* Field from the business component.	Tells the business component which field is to be used to indicate the status.

CSSBCPharmaCall Class Business Component User Properties

The following table describes the user properties that are related to the following business components:

- Pharma Account Call
- Pharma Attendee Call
- Pharma Template Call
- Pharma Professional Call
- Pharma Promotional Items Dropped
- Pharma Professional 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. For example, Template Fields user property supports Pharma Promotional Items Dropped, Pharma Professional Call Sample Dropped, Pharma Activity Product Issues, and Pharma Call Sample Dropped. These BCs are not applicable to other user properties in the following table.

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 Category is Attendee Call.
Cascading Fields	*,field1,field2,...,* 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.
Paper Reference Number Required	*Y* or *N*	If Y and the Paper Sign field is selected, then Ref # is a required field for call submission. Applies to the Pharma Professional Call business component.
Sample Disbursed Required	*Y* or *N*	If Y, at least once sample must be disbursed before a call is submitted. Applies to the Pharma Professional Call business component.

User Property Name	User Property Value	Description
SRE Reference Number Required	*Y* or *N*	If Y and the signature is being captured electronically, Ref # is a required field for call submission. Applies to the Pharma Professional Call business component.
Status Field	*Field* Field from the business component.	Tells the business component which field is to be used to indicate the status of the activity.
SubCall Component	*Business component name* 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	*Business component name* 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	*Field1,field2,...* 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.
Update After Recreate Receipt	Last Name, Address, Start Date, Comment, Signature Captured Value must start and end with a comma. You can add additional fields, but do not delete any of the default ones (preceding line).	Tells the business component what fields are editable after the user clicks Recreate Receipt. Applies to the Pharma Professional Call business component.
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,..., 	Tells the business component what fields are editable after a call is synchronized (with the Siebel Mobile application for Siebel Pharma on a mobile device).

User Property Name	User Property Value	Description
	Value must start and end with a comma. Example: ,Comment,	Generally this user property should be used only to make the Comment field editable.
Validate Sample Ref #	*Y* or *N*	Tells the business component whether it should require a sample reference number when submitting a call.

LS Pharma Audit Signature BC User Properties

The following table describes the user properties that apply to the LS Pharma Audit Signature BC.

Name	Value	Description
Signature Header Text Field	Calc Sign Header Text	Field use by Signature header.
Header Text Field: 2	Audit Completed Date	Field used by Signature header.
Header Text Field: 1	Owner Full Name	Field used by Signature header.
Checksum Field: 1	"Signature Header Text"	Field used by Signature checksum.
Checksum Field: 3	"Created By", "Created By"	Field used by Signature checksum.
Checksum Field: 2	"Signature Body Text"	Field used by Signature checksum.
Display About Box	Y	Disables the About box in the Signature Capture Dialog on the mobile device.
Signature Date	Y	Enable Signature date.
Signature Time	Y	Enable Signature time.
Minimum Memory Required To Sign	2500000	2.5 mega bytes.

LS Pharma Call Products Detailed Alloc VBC User Properties

Virtual business components (VBCs) are used to view data from an external system in Siebel Business Applications. Using this mechanism, no replication within the Siebel database is required.

The following table describes the user properties that apply to the LS Pharma Call Products Detailed Alloc VBC (Virtual Business Components).

Name	Value	Description
Qty Field	Priority	Holds the name of the field to save from VBC to BC when a value of the field is modified or added.
Copy Field 3	Name	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 4	Indication	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Source BusComp	LS Pharma My Products List	Holds the name of the parent Products BC, which is using to get the values for the VBC.
Parent BusComp	Pharma Call Products Detailed	Holds the exact name of the parent Products Detailed BC.
Copy Field 2	Product Allocation Id	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 1	Priority	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Query Field 1	Product Allocation Id	Holds the name of the field to save from VBC to BC when a value for this field is modified or added.
Qty Field 1	Indication	Holds the name of the field to save from VBC to BC when a value of the field is modified or added.
Copy Field 6	Alloc Start Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 7	Alloc End Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.

LS Pharma Call Products Detailed VBC - CE User Properties

The following table describes the user properties that apply to the LS Pharma Call Products Detailed VBC - CE.

Name	Value	Description
Template Fields	Name, Priority, Indication	Specify the list of fields in the VBC which needs to be updated when a smart call template is applied to the call
Sort Spec:Pharma Call Products Detailed - CE	Product Id	Specify the sort specification to be applied on the Call Product BC.
VBC Field Map:Pharma Personal Products - CE	`Name, Product|Allocation Id, Id|Product Id, Product Id| Indication, Indication Other| Order By, Order By`	Specify the mapping between the VBC fields and the Personal Allocation BC fields. The mapping syntax is <VBC Field Name>, <Personal Allocation BC Field Name> [|<VBC Field Name>, <Personal Allocation BC Field Name>].
VBC Field Map:Pharma Call Products Detailed - CE	`Name, Name|Product Id, Product Id|Allocation Id, Allocation Id|Priority, Priority| Indication, Indication`	Specify the mapping between the VBC fields and the Call Product BC fields. The mapping syntax is <VBC Field Name>, <Call Product BC Field Name> [|<VBC Field Name>, <Call Product BC Field Name>].
Search Spec: Pharma Personal Products - CE	`[Start Date] <= '$StartDate$' AND([End Date] IS NULL OR [End Date] >= '$StartDate$')`	Specify the search spec to be applied on the Personal Allocation BC. $StartDate$ is the key word which will be replaced at run time with the actual call date.
Personal Allocation BC	Pharma Personal Products - CE	Specify the name of the BC that holds information about the products allocated to the sales rep for detailing.
Call Product BC	Pharma Call Products Detailed - CE	Specify the name of the BC that holds information about the products detailed in the call.

LS Pharma Call Promotional Items Dropped VBC - CE User Properties

The following table describes the user properties that apply to the LS Pharma Call Promotional Items Dropped VBC - CE.

Name	Value	Description
VBC Field Map:Pharma Promotional Items Dropped - CE	`Name, Name|Product Id, Product Id|Allocation Id, Allocation Id|Quantity, Quantity`	Specify the mapping between the VBC fields and the Personal Allocation BC fields. The mapping syntax is <VBC Field Name>, <Personal Allocation BC Field Name> [|<VBC Field Name>, <Personal Allocation BC Field Name>].
VBC Field Map:Pharma Personal Promotional Items - CE	`Name, Promotional Item|Allocation Id, Id|Product Id, Product Id|Order By, Order By`	Specify the mapping between the VBC fields and the Call Product BC fields. The mapping syntax is <VBC Field Name>, <Call Product BC Field Name> [|<VBC Field Name>, <Call Product BC Field Name>].
Search Spec: Pharma Personal Promotional Items - CE	`[Start Date] <= '$StartDate$' AND([End Date] IS NULL OR [End Date] >= '$StartDate$')`	Specify the search spec to be applied on the Personal Allocation BC. $StartDate$ is the key word which will be replaced at run time with the actual call date.
Template Fields	Name, Quantity	Specify the list of fields in the VBC which needs to be updated when a smart call template is applied to the call.
Call Product BC	Pharma Promotional Items Dropped - CE	Specify the name of the BC that holds information about the promotional items dropped in the call.
Personal Allocation BC	Pharma Personal Promotional Items - CE	Specify the name of the BC that holds information about the promotional items allocated to the sales rep for use in the calls.
Sort Spec:Pharma Promotional Items Dropped - CE	Product Id	Specify the sort spec to be applied on the Call Product BC.

LS Pharma Call Samples Dropped Alloc VBC User Properties

The following table describes the user properties that apply to the LS Pharma Call Samples Dropped Alloc VBC.

Name	Value	Description
Copy Field 4	Lot Name	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 3	Name	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 2	Product Allocation Id	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.

Name	Value	Description
Copy Field 1	Quantity	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 6	Alloc End Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Default Best Lots	TRUE	Holds the name of the field to populate from BC to VBC.
Copy Field 5	Alloc Start Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Source BusComp	LS Pharma My Sample Lots List	Holds the name of the parent Samples Dropped BC, which is used to get the values for the VBC.
Query Field 2	Lot Name	Holds the name of the field to populate from BC to VBC.
Query Field 1	Product Allocation Id	Holds the name of the field to populate from BC to VBC.
Parent BusComp	Pharma Call Sample Dropped	Holds the name of the parent Samples BC name.
Qty Field	Quantity	Holds the name of the field to save from VBC to BC when a value of the field is modified or added.

LS Pharma Call Samples Dropped VBC - CE User Properties

The following table describes the user properties that apply to the LS Pharma Call Samples Dropped VBC - CE.

Name	Value	Description
Call Product BC	Pharma Call Sample Dropped - CE	Specify the name of the BC that holds information about the samples dropped in a call.
Enable Best Lot Mode	Y	Specify Y to display only the available best lot against each sample else N. Best Lot is determined by the cut off date on the lot the cut off date must be greater than or equal to call date and the lot should not be expired.

Name	Value	Description
Personal Allocation BC	Pharma Personal Samples - CE	Specify the name of the BC that holds information about the samples allocated to the sales rep for use in the calls.
Personal Inventory BC	LS Pharma Personal Inventory - CE	Specify the name of the BC that holds information about the sales rep personal inventory.
Search Spec:LS Pharma Personal Inventory - CE	`([End Date] > '$StartDate$' OR [End Date] IS NULL) AND [Audit Report Id] IS NULL AND [Close Date] IS NULL`	Specify the search specification to be applied on the Personal Inventory BC. $StartDate$ is the key word which will be replaced at run time with the actual call date.
Search Spec:Pharma Personal Samples - CE	`[Start Date] <= '$StartDate$' AND ([End Date] IS NULL OR [End Date] >= '$StartDate$')`	Specify the search specification to be applied on the Personal Allocation BC. $StartDate$ is the key word which will be replaced at run time with the actual call date.
Sort Spec:LS Pharma Personal Inventory - CE	`Parent Product IdCutoff Threshold (DESCENDING)End Date`	Specify the sort specification to be applied on the Personal Inventory BC.
Sort Spec:Pharma Personal Samples - CE	Product Id	Specify the sort specification to be applied on the Call Product BC.
Template Fields	NameQuantity	Specify the list of fields in the VBC which needs to be updated when a smart call template is applied to the call.
VBC Field Map:LS Pharma Personal Inventory - CE	Lot Name Lot NameProductId Parent Product Id Internal Product Id Cutoff Threshold	Specify the mapping between the VBC fields and the Personal Inventory BC fields. The mapping syntax is <VBC Field Name><Personal Allocation BC Field Name> [VBC Field Name><Personal Inventory BC Field Name>].
VBC Field Map:Pharma Call Sample Dropped - CE	Allocation Id Allocation Name Id Product Quantity	Specify the mapping between the VBC fields and the Call Product BC fields. The mapping syntax is <VBC Field Name><Call Product BC Field Name> [VBC Field Name><Call Product BC Field Name>].
VBC Field Map:Pharma Personal Samples - CE	NameSampleAllocation Product Id Order By	Specify the mapping between the VBC fields and the Personal Allocation BC fields. The mapping syntax is <VBC Field Name><Personal Allocation BC Field Name> [VBC Field Name><Personal Allocation BC Field Name>].
VBC Key Fields	Allocation Id Lot Id	Specify the name of the field names that holds the Id value.

LS Pharma Call Samples Requested VBC - CE User Properties

The following table describes the user properties that apply to the LS Pharma Call Samples Requested VBC - CE.

Name	Value	Description
VBC Field Map:LS Pharma Call Samples Requested - CE	`Allocation Id, Allocation Id|Name, Name|Product Id, Product Id|Quantity, Quantity`	Specify the mapping between the VBC fields and the Call Product BC fields. The mapping syntax is <VBC Field Name>, <Call Product BC Field Name> [|<VBC Field Name>, <Call Product BC Field Name>].
VBC Field Map:LS Pharma Personal Sample Requests - CE	`Allocation Id, Id|Name, Sample|Product Id, Product Id|Order By, Order By`	Specify the mapping between the VBC fields and the Personal Allocation BC fields. The mapping syntax is <VBC Field Name>, <Personal Allocation BC Field Name> [|<VBC Field Name>, <Personal Allocation BC Field Name>].
Personal Allocation BC	LS Pharma Personal Sample Requests - CE	Specify the name of the business component that holds information about the direct send samples allocated to the sales rep for use in the calls.
Call Product BC	LS Pharma Call Samples Requested - CE	Specify the name of the business component that holds information about the samples requested in a call.
Search Spec: LS Pharma Personal Sample Requests - CE	`[Start Date] <= '$StartDate$' AND([End Date] IS NULL OR [End Date] >= '$StartDate$')`	Specify the search specification to be applied on the Personal Allocation BC. $StartDate$ is the key word which will be replaced at run time with the actual call date.
Sort Spec:Pharma Personal Sample Requests - CE	Product Id	Specify the sort specification to be applied on the Call Product BC.
Template Fields	Name, Quantity	Specify the list of fields in the VBC which needs to be updated when a smart call template is applied to the call.

LS Pharma Call Signature Audit BC User Properties

The following table describes the user properties that apply to the LS Pharma Call Signature Audit BC.

Name	Value	Description
Header Text Field: 1	Contact Full Name	Field used in Signature header.

Name	Value	Description
Header Text Field: 2	Title	Field used in Signature header.
Header Text Field: 3	Address	Field used in Signature header.
Header Text Field: 4	Call License #	Field used in Signature header.
Header Text Field: 5	License Number	Field used in Signature header.
Header Text Field: 6	Call DEA #	Field used in Signature header.
Header Text Field: 7	DEA#	Field used in Signature header.
Header Text Field: 8	Call Date Text	Field used in Signature header.
Header Text Field: 9	Call Date	Field used in Signature header.
Checksum Field: 1	"Signature Header Text"	Field used in Signature checksum.
Checksum Field: 2	"Signature Body Text"	Field used in Signature checksum.
Checksum Field: 3	"Created By", "Created By"	Field used in Signature checksum.
Named Method 1	`MakeMasterSignature", "INVOKESVC", "LS Pharma Call Signature Audit", "LS Pharma Signature Utility Service", "MakeMasterSignature", "'Signature Id'", "[Id]"`	Named Method used for Make Master button on the Signature Audit view.
Named Method 3	`"ClearAuditFlags", "INVOKESVC", "LS Pharma Call Signature Audit", "LS Pharma Signature Utility Service", "ClearAuditFlags"`	Named Method used for Clear Audit Flags button on the Signature Audit view.

LS Pharma Contact Assessment Attribute - CE BC User Properties

The following table describes the user properties that apply to the LS Pharma Contact Assessment Attribute - CE BC.

Name	Value	Description
Deep Delete	Sales Assessment Attribute Value	Deletes the attribute values when the Assessment Values are deleted.

Name	Value	Description
Sequence Field	Order	Used in the Code for Usability feature.

LS Pharma Contact Assessment Template - CE BC User Properties

The following table describes the user properties that apply to the LS Pharma Contact Assessment Template - CE BC.

Name	Value	Description
Deep Delete1	LS Pharma Contact Assessment Attribute - CE	Deletes the attribute values when the Assessment Values are deleted.
Deep Copy1	LS Pharma Contact Assessment Attribute - CE	Copies the attribute values when the Assessment Values are copied.

LS Pharma Disclaimer Rule Set BC User Properties

The following table describes the user properties that apply to the LS Pharma Disclaimer Rule Set BC.

Name	Value	Description
Active Field	Is Editable	Field used to control whether you can edit a BC or not.
BC Field Profile Attribute 1	`Pharma Call, "LS Pharma.Call.BCFieldProfession "Pharma Professional Call", "Professional Type"`	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from.
BC Field Profile Attribute 2	`Pharma Call, "LS Pharma.Call.BCFieldPrimarySpe "Pharma Professional Call", "Primary Specialty"`	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from.
BC Field Profile Attribute 3	`Pharma Call, "LS Pharma.Call.BCFieldState",`	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to,

Name	Value	Description
	"Pharma Professional Call", "State"	corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from.
BC Field Profile Attribute 4	Inventory Audit, "LS Pharma.Inventory Audit.BCFieldAuditReportCateg "LS Pharma Audit Reports", "Category LIC"	Profile Attribute defined for Inventory Audit type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from.
BC Field Profile Attribute 5	Pharma Call, "LS Pharma.Call.BCFieldRecreatedF "Pharma Call Signature", "Recreated Flag"	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from.
Child BC Field Profile Attribute 1	Pharma Call, "LS Pharma.Call.ChildBCFieldContr "Pharma Call Sample Dropped", "Controlled Substance"	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from. Usually the BusComp is the child BC of the entity that requires a Signature.
Child BC Field Profile Attribute 2	Pharma Call, "LS Pharma.Call.ChildBCFieldProdu "Pharma Call Sample Dropped", "Name"	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part and fourth part are the BC name and Field name where the Profile Attribute Value comes from. Usually the BusComp is the child BC of the entity that requires a Signature.
Child BC Row Profile Attribute 3	Pharma Call, "LS Pharma.Call.IsProductDetailed "Pharma Call Products Detailed"	Profile Attribute defined for Pharma Call type Dynamic Disclaimer. The first part of the Value is the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Profile Attribute. The third part is the name of the BC that is queried to decide if there is any record in it.
Disclaimer Rule Set Type 1	Pharma Call, "LS Pharma Call Signature Form Applet"	This user property defines the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Applet that will be used to capture the signature for the current type.

Name	Value	Description
Disclaimer Rule Set Type 2	`Txn Adjustment, "LS Pharma Txn Adjustment Signature Form Applet"`	This user property defines the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Applet that will be used to capture the signature for the current type.
Disclaimer Rule Set Type 3	`Inventory Audit, "LS Pharma Signature Capture Form Applet"`	This user property defines the type of the Signature that the Dynamic Disclaimer will be applied to, corresponding to the Sub-Type of the Disclaimer. The second part is the name of the Applet that will be used to capture the signature for the current type.
Field Read Only Field: Description	Is Read Only	Field used to control whether you can edit the field 'Description'.
Field Read Only Field: Name	Is Read Only	Field used to control whether you can edit the field 'Name'.
Field Read Only Field: Rule Set Type	Is Read Only	Field used to control whether you can edit the field 'Rule Set Type'.
Named Method 1	`ActivateDisclaimerRuleSet, "INVOKESVC", "LS Pharma Disclaimer Rule Set", "LS Pharma Signature Utility Service", "ActivateDisclaimerRuleSet", "'Rule Set Id'", "[Id]"`	Named Method used for Activate button on the Disclaimer Rule Set view.

LS Pharma Inventory Audit Report BC User Properties

The following table describes the user properties that apply to the LS Pharma Inventory Audit Report BC.

Name	Value	Description
Named Method 2	`"Reject", "INVOKESVC", "LS Pharma Inventory Audit Report", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma Inventory Audit Rejection", "'RowId'", "[Id]"`	Call Business Service to reject report.
Named Method 3	`"Reject", "INVOKE", "LS Pharma Inventory Audit Report", "RefreshBusComp"`	Refresh Business Component.
Named Method 1	`"Approve", "INVOKE", "LS Pharma Inventory Audit Report", "RefreshBusComp"`	Refresh Business Component.

Name	Value	Description
LOY CanInvokeMethod 2	`"Reject", "CanSubmit"`	Disable the Reject button after record is submitted.

LS Pharma Inventory Period User Properties

The following table describes the user properties that apply to the LS Pharma Inventory Period BC.

Name	Value	Description
Acceptable Period to Complete Synchronization	20	The mobile device must be successfully synchronized to the laptop with this time, unit is minutes.
Inventory Closure Validation	N	Used to perform validation for Reconciliation.
Named Method 3	`"CloseoutCount", "INVOKE", "LS Pharma Inventory Period", "RefreshBusComp"`	Refresh Business Component.
Named Method 5	`"AckNewPeriod", "INVOKE", "LS Pharma Inventory Period", "RefreshBusComp"`	Refresh Business Component.
Named Method 2	`"CloseoutCount", "INVOKESVC", "LS Pharma Inventory Period", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma CloseOut Ineventory Count", "'Submit to Id'", "[Approved by Id]", "'RowId'", "[Id]", "'Owner Id'", "[Owned By Id]"`	Call Business Service to create closeout count report.
Named Method 1	`"InterimCount", "INVOKE", "LS Pharma Inventory Period", "RefreshBusComp"`	Refresh Business Component.
Field Read Only Field: Approver Full Name	ReadOnly Flag	Reviewer field control flag.
Maximum Periods	2	Limits the number of unreconciled periods including active period.
LOY CanInvokeMethod 3	`"AckNewPeriod", "CanAck"`	Acknowledge control flag.
LOY CanInvokeMethod 1	`"InterimCount", "CanCount"`	Interim Count control flag.

Name	Value	Description
LOY CanInvokeMethod 2	`"CloseoutCount", "CanCloseOutCount"`	Disable Closeout after record is submitted.
Named Method 4	`"AckNewPeriod", "INVOKESVC", "LS Pharma Inventory Period", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma Inventory Audit Acknowledgement", "'RowId'", "[Id]", "'Owner Id'", "[Owned By Id]"`	Call Business Service to acknowledge new inventory period.

LS Pharma Inventory Period Reconciliation BC User Properties

The following table describes the user properties that apply to the LS Pharma Inventory Period Reconciliation BC.

Name	Value	Description
Maximum Periods	2	Limits the number of unreconciled periods including active period.
Inventory Closure Validation	N	Used in validation for Reconciliation.
Field Read Only Field: Approver Full Name	ReadOnly Flag	Reviewer field control flag.

LS Pharma Location Audit Report BC User Properties

The following table describes the user properties that apply to the LS Pharma Location Audit Report BC.

Name	Value	Description
LOY CanInvokeMethod 3	`"RejectLocationAudit", "CanApprove"`	Reject control flag.
LOY CanInvokeMethod 1	`"SubmitLocationAudit", "CanSubmit"`	Submit control flag.
Named Method 4	`"ApproveLocationAudit", "INVOKE", "LS Pharma Location Audit Report", "RefreshBusComp"`	Refresh Business Component.

Name	Value	Description
Named Method 3	`"ApproveLocationAudit", "INVOKESVC", "LS Pharma Location Audit Report", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma Location Audit Approval", "'RowId'", "[Id]"`	Call Business Service to approve location audit report.
Named Method 1	`"SubmitLocationAudit", "INVOKESVC", "LS Pharma Location Audit Report", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma Location Audit Submit", "'Submit to Id'", "[Approved by Id]", "'RowId'", "[Id]", "'Owner Id'", "[Owned By Id]"`	Call Business Service to submit location audit report.
Named Method	`"SubmitLocationAudit", "INVOKE", "LS Pharma Location Audit Report", "WriteRecord"`	Force write record.
Named Method 6	`"RejectLocationAudit", "INVOKE", "LS Pharma Location Audit Report", "RefreshBusComp"`	Refresh Business Component.
LOY CanInvokeMethod 2	`"ApproveLocationAudit", "CanApprove"`	Approve control flag.
Field Read Only Field: Status	ReadOnly Flag	Set field read only according to the status.
Field Read Only Field: Type	ReadOnly Flag	Set field read only according to the status.
Field Read Only Field: Submitted to	ReadOnly Flag	Set field read only according to the status.
Field Read Only Field: Owned By Id	ReadOnly Flag	Set field read only according to the status.
Report Field Read Only Field: Owned By	ReadOnly Flag	Set field read only according to the status.
Field Read Only Field: Completed Date	ReadOnly Flag	Set field read only according to the status.
Field Read Only Field: Approved by Id	ReadOnly Flag	Set field read only according to the status.

Name	Value	Description
Aspect Child BC ReadOnly: APPROVAL	ReadOnly Flag	Set field read only according to the status.
Named Method 5	`"RejectLocationAudit", "INVOKESVC", "LS Pharma Location Audit Report", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Audit Reports", "'BC Name'", "LS Pharma Audit Reports", "'ProcessName'", "LS Pharma Location Audit Rejection", "'RowId'", "[Id]"`	Call Business Service to reject location audit report.

LS Pharma Promotional Items Dropped Alloc VBC User Properties

The following table describes the user properties that apply to the LS Pharma Promotional Items Dropped Alloc VBC.

Name	Value	Description
Copy Field 1	Quantity	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Source BusComp	LS Pharma My Promotional Items List	Holds the name of the parent Promotional Items BC, which is used to get the values for the VBC.
Copy Field 5	Alloc End Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 2	Product Allocation Id	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Parent BusComp	Pharma Promotional Items Dropped	Holds the name of the parent Promotional Items BC name.
Copy Field 4	Alloc Start Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Query Field 1	Product Allocation Id	Holds the name of the field to Save from VBC to BC when the Value for this field is added or modified.

LS Pharma Samples Request BC User Properties

The following table describes the user properties that apply to the LS Pharma Samples Request BC.

Name	Value	Description
Signature Body Text Field: 2	Name	Copied from Pharma Call Sample Dropped - CE for signature verification.
Signature Body Text Field: 3	Vendor Name	Copied from Pharma Call Sample Dropped - CE for signature verification.
Signature Body Text Field: 1	Quantity	Copied from Pharma Call Sample Dropped - CE for signature verification.
Template Fields	Name, Quantity	Fields to copy from the visit template.
Parent Read Only Field	Pharma Template Call.Is Not Creator	Disables the Add button when the Contact is not a valid Professional.
Copy Field 3	Name	Holds the name of the field to populate from BC to VBC.
Copy Field 5	Alloc End Date	Holds the name of the field to populate from BC to VBC.
Copy Field 4	Alloc Start Date	Holds the name of the field to populate from BC to VBC.
Copy Field 2	Product Allocation Id	Holds the name of the field to populate from BC to VBC.

LS Pharma Samples Request VBC User Properties

The following table describes the user properties that apply to the LS Pharma Samples Request VBC.

Name	Value	Description
Query Field 1	Product Allocation Id	Holds the name of the field to populate from BC to VBC.
Source BusCom	LS Pharma My Direct Send Samples List	Holds the name of the parent Samples Requested BusComp, which is using to get the proper values for the VBC.

Name	Value	Description
Qty Field	Quantity	Holds the name of the field to save from VBC to BC when the value for this field is added or modified.
Parent BusComp	LS Pharma Samples Request BC	Holds the name of the parent Sample Requested BusComp name.
Copy Field 1	Quantity	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 3	Name	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 5	Alloc End Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 4	Alloc Start Date	Holds the name of the field to populate from Source BusComp to this VBC and to copy from VBC to Parent BusComp.
Copy Field 2	Product Allocation Id	Holds the name of the field to populate from BC to VBC.

LS Pharma Personal Inventory BC User Properties

The following table describes the user properties that apply to the LS Pharma Personal Inventory BC.

Name	Value	Description
Field Read Only Field: Client Quantity	Count ReadOnly	Quantity read only field according to parent status.

LS Pharma Sample Received History Item BC User Properties

The following table describes the user properties that apply to the LS Pharma Sample Received History Item BC.

Name	Value	Description
Field Read Only Field: Quantity	`[Reconciled Flag]`	Quantity field readonly if parent inventory period is reconciled.
Named Method	`"RefreshParent", "INVOKE", "LS Pharma Sample Transactions", "RefreshBusComp"`	Refresh Parent Business Component.

Name	Value	Description
Parent Read Only Field	`LS Pharma Sample Transactions.ReadOnly Flag`	Read only field according to the parent status.
On Field Update Set	`"Requested Quantity", "Quanitiy", "IIF([Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Disbursement') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Return') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Transfer Out') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Loss'), [Requested Quantity] * -1,[Requested Quantity])"`	Correct quantity value according to the transaction type.

LS Pharma Sample Transaction History Item BC User Properties

The following table describes the the user properties that apply to the LS Pharma Sample Transaction History Item BC.

Name	Value	Description
Field Read Only Field: Quantity	`[Reconciled Flag]`	Quantity read only field if parent inventory period is reconciled.
Named Method	`"RefreshParent", "INVOKE", "LS Pharma Sample Transactions", "RefreshBusComp"`	Refresh parent business component.
Parent Read Only Field	ReadOnly Flag	Read only according to the parent status.
Field Read Only Field: Lot Name	Adjusted Flag	Disable Product picklist if transaction is adjusted.
Field Read Only Field: Product	Adjusted Flag	Disable Product picklist if transaction is adjusted.
On Field Update Set	`"Requested Quantity", "Quanitiy", "IIF([Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Disbursement') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Return') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Transfer Out') OR [Txn Type] = LookupValue('SAMPLE_TXN_TYPE','Loss'), [Requested Quantity] * -1,[Requested Quantity])"`	Correct quantity value according to the transaction type.

LS Pharma Sample Transactions BC User Properties

The following table describes the user properties that apply to the LS Pharma Sample Transactions BC.

Name	Value	Description
Named Method 2	`"Reject", "INVOKESVC", "LS Pharma Sample Transactions", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Sample Transactions", "'BC Name'", "LS Pharma Sample Transactions", "'ProcessName'", "LS Pharma Reject Sample Transaction", "'RowId'", "[Id]"`	Readonly according to the parent status.Call Business Service to reject sample adjustment.
Field Read Only Field: Due Date	Lock Period Flag	Transaction date control flag.
Field Read Only Field: Owned By Full Name	Is Owner Adjusted	Disable field according to the control field.
Field Read Only Field: Owned By Id	Is Owner Adjusted	Disable field according to the control field.
Field Read Only Field: Quote Number	Is Adjustment Flag	Disable field according to the control field.
Named Method 3	`"Reject", "INVOKE", "LS Pharma Sample Transactions", "RefreshBusComp"`	Refresh business component.
Named Method 1	`"Approve", "INVOKE", "LS Pharma Sample Transactions", "RefreshBusComp"`	Refresh business component.
Field Read Only Field: Transfer By Id	Is Adjustment Flag	Disable field according to the control field.
Field Read Only Field: Transfer By Full Name	Is Adjustment Flag	Disable field according to the control field.
Field Read Only Field: Submit to	No Approval Flag	Disable field according to the control field.
Field Read Only Field: Stock Period	Is Adjustment Flag	Disable field according to the control field.
Field Read Only Field: Stock Id	Is Adjustment Flag	Disable field according to the control field.

Name	Value	Description
Field Read Only Field: Arrival Date	Transfer In ReadOnly Flag	Disable field according to the control field.
Field Read Only Field: Approved by Id	Is Adjustment Flag	Disable field according to the control field.
Deep Delete 3	LS Pharma Sample Txn Signature	Enable deep delete on child business component.
Deep Delete 2	LS Pharma Sample Transactions Attachment	Enable deep delete on child business component.
Deep Delete 1	LS Pharma Sample Transaction History Item	Enable deep delete on child business component.
Deep Copy 2	LS Pharma Sample Transactions Attachment	Enable deep copy on child business component.
Deep Copy 1	LS Pharma Sample Transaction History Item	Enable deep copy on child business component.
Aspect BC NoInsert: Disbursement	Disbursement Flag	Disable insert for Sample Disbursement.
Named Method	`"Approve", "INVOKESVC", "LS Pharma Sample Transactions", "LS Pharma Inventory Administration Service", "RunProcess", "'BO Name'", "LS Pharma Sample Transactions", "'BC Name'", "LS Pharma Sample Transactions", "'ProcessName'", "LS Pharma Approve Sample Transaction", "'RowId'", "[Id]"`	Call Business Service to approve sample adjustment.
Aspect BC ReadOnly	Aspect Child BC ReadOnly	Used to control access in normal and admin view.
Aspect BC NoInsert: Disbursement	Disbursement Flag	Used to control No Insert Disbursement in normal view.
Aspect BC NoInsert: Disbursement Admin	Disbursement Flag	Used to control No Insert Disbursement in admin view.
Aspect BC ReadOnly: Adjustment	Admin Adjusted Flag	Used to control Adjustment in normal view.
Aspect BC ReadOnly: Adjustment Admin	User Adjusted Flag	Used to control Adjustment in admin view.

Name	Value	Description
Aspect BC ReadOnly: Disbursement	Admin Adjusted Flag	Used to control Disbursement in normal view.
Aspect BC ReadOnly: Disbursement Admin	User Adjusted Flag	Used to control Disbursement in admin view.
Aspect BC ReadOnly: Lost	Admin Adjusted Flag	Used to control Lost in normal view.
Aspect BC ReadOnly: Lost Admin	User Adjusted Flag	Used to control Lost in admin view.
Aspect BC ReadOnly: Return	Admin Adjusted Flag	Used to control Return in normal view.
Aspect BC ReadOnly: Return Admin	User Adjusted Flag	Used to control Return in admin view.
Aspect BC ReadOnly: Transfer In	Admin Adjusted Flag	Used to control Transfer In in normal view.
Aspect BC ReadOnly: Transfer In Admin	User Adjusted Flag	Used to control Transfer In in admin view.
Aspect BC ReadOnly: Transfer Out	Admin Adjusted Flag	Used to control Transfer Out in normal view.
Aspect BC ReadOnly: Transfer Out Admin	User Adjusted Flag	Used to control Transfer Out in admin view.
Aspect Child BC ReadOnly: Adjustment	Admin Adjusted Flag	Used to control child Adjustment in normal view.
Aspect Child BC ReadOnly: Adjustment Admin	User Adjusted Flag	Used to control child Adjustment in admin view.
Aspect Child BC ReadOnly: Disbursement	Admin Adjusted Flag	Used to control child Disbursement in normal view.
Aspect Child BC ReadOnly: Disbursement Admin	User Adjusted Flag	Used to control child Disbursement in admin view.
Aspect Child BC ReadOnly: Lost	Admin Adjusted Flag	Used to control child Lost in normal view.
Aspect Child BC ReadOnly: Lost Admin	User Adjusted Flag	Used to control child Lost in admin view.

Name	Value	Description
Aspect Child BC ReadOnly: Return	Admin Adjusted Flag	Used to control child Return in normal view.
Aspect Child BC ReadOnly: Return Admin	User Adjusted Flag	Used to control child Return in admin view.
Aspect Child BC ReadOnly: Transfer In	Admin Adjusted Flag	Used to control child Transfer In in normal view.
Aspect Child BC ReadOnly: Transfer In Admin	User Adjusted Flag	Used to control child Transfer In in admin view.
Aspect Child BC ReadOnly: Transfer Out	Admin Adjusted Flag	Used to control child Transfer Out in normal view.
Aspect Child BC ReadOnly: Transfer Out Admin	User Adjusted Flag	Used to control child Transfer Out in admin view.
Copy Source Field	[Source Txn Id]	Used to copy source transactions.

LS Pharma Sample Transactions Attachment BC User Properties

The following table describes the user properties that apply to the LS Pharma Sample Transactions Attachment BC.

Name	Value	Description
Parent Read Only Field	LS Pharma Sample Transactions.Adjusted Flag	Read only according to the parent status.
FileMustExist	TRUE	Validate file existence for attachments.
DefaultPrefix	SampTxn	Attachment internal file prefix.

LS Pharma Sample Transfer In Item BC User Properties

The following table describes the user properties that apply to the LS Pharma Sample Transfer In Item BC.

Name	Value	Description
Field Read Only Field: Product	Updated Flag	Disable product change after saved.
Named Method	`"RefreshParent", "INVOKE", "LS Pharma Sample Transactions", "RefreshBusComp"`	Call Business Service to refresh sample transaction.
Parent Read Only Field: LS Pharma Sample Transactions	Transfer In ReadOnly Flag	Read only according to the parent status.
Field Read Only Field: Lot Name	Updated Flag	Disable lot change after saved.

LS Pharma Samples Attachment BC User Properties

The following table describes the user properties that apply to the LS Pharma Samples Attachment BC.

Name	Value	Description
DefaultPrefix	Audit	Attachment internal file prefix.
FileMustExist	TRUE	Validate file existence for attachments.

LS Pharma Sample Txn Signature BC User Properties

The following table describes the user properties that apply to the LS Pharma Sample Txn Signature BC.

Name	Value	Description
Minimum Memory Required To Sign	2500000	2.5 mega bytes.
Header Text Field: 2	Audit Completed Date	Field used by Signature header.
Header Text Field: 1	Owner Full Name	Field used by Signature header.
Checksum Field: 1	`"Signature Header Text"`	Field used by Signature checksum.
Checksum Field: 3	`"Created By", "Created By"`	Field used by Signature checksum.
Checksum Field: 2	`"Signature Body Text"`	Field used by Signature checksum.

Name	Value	Description
Display About Box	Y	Disables the About box in the Signature Capture Dialog on the mobile device.
Signature Date	Y	Enable Signature date.
Signature Time	Y	Enable Signature time.

Pharma Account Call BC User Properties

The following table describes the user properties that apply to the Pharma Account Call BC.

Name	Value	Description
Named Method 1	`"Sign","INVOKESVC", "Pharma Account Call", "LS Pharma Call Utility Service", "Sign"`	Invokes this method when the user clicks Sign.
Named Method 4	`"GotoDetails", "INVOKESVC", "Pharma Account Call", "LS Pharma Call Utility Service", "GotoDetails"`	Invokes this method when the user clicks New Call.
Named Method 2	`"Submit", "INVOKESVC", "Pharma Account Call", "LS Pharma Call Utility Service", "Submit"`	Invokes this method when the user clicks Submit.
Named Method 3	`"Validate", "INVOKESVC", "Pharma Account Call", "LS Pharma Validation Engine Service", "Validate"`	This method validates the call.
Refresh BC List	LS Pharma Call Products Detailed VBC - CE	Holds the list of visual business component names that needs to be refreshed.
Submit Call Copy From Field 1	Start Date	Name of the Call Date field to copy back to the Position BC, when submitting the Call.
Submit Call Copy From Field 2	Next Call Date	Name of the Next Call Date field to copy back to the Position BC, when submitting the Call.
Submit Call Parent Field Id	Account Id	Name of the field to set the Id for the Call.

Name	Value	Description
Submit Call Copy From Field 3	Next Call Objective	Name of the Next Call Objective field to copy back to the Position BC,when submitting the Call.
Submit Call Copy To Field 1	Pharma Last Account Call Date	Name of the field setting in the Position BC, when submitting the Call.
Submit Call Copy To Field 2	LS Pharma Account Next Call Date	Name of the field setting in the Position BC, when submitting the Call.
Submit Call Copy To Field 3	LS Pharma Account Next Call Obj	Name of the field setting in the Position BC, when submitting the Call.
Validation Results View	LS Pharma Account Call Validation Results View - CE	Holds the name of the view which displays the validation results.

Pharma Call Products Detailed - CE BC User Properties

The following table describes the user properties that apply to the Pharma Call Detailed - CE BC.

Name	Value	Description
CleanUp Search Spec	`[Priority] <= 0`	Used to specify the condition on when the clean up on the search specification has to be done on the call product detail BC.

Pharma Call Products Detailed - CE User Properties

The following table describes the user properties that apply to the Pharma Call Detailed - CE BC.

Name	Value	Description
CleanUp Search Spec	`[Priority] <= 0`	Specifies the condition when the clean up on the search specification needs to be done.

Pharma Call Sample Dropped - CE User Properties

The following table describes the user properties that apply to the Pharma Call Detailed - CE BC.

Name	Value	Description
CleanUp Search Spec	`[Priority] <= 0`	Specifies the condition when the clean up on the search specification needs to be done.

Pharma Call Samples Requested - CE User Properties

The following table describes the user properties that apply to the Pharma Call Samples Requested - CE BC.

Name	Value	Description
Signature Body Text Field: 3	Vendor Name	Holds the field name that is used in the signature body text.
CleanUp Search Spec	`[Quantity] <= 0`	Specify the condition when the clean up has to be done on the sample request BC.
Parent PickList FieldName	Name	Holds the picklist field name to get field value.
Skip Conflict Resolution For Duplicate Records	Y	Default value is set to Y. During synchronization, if the object manager encounters a duplicate record, it drops the record from the device and keep a record on the Siebel server.
Update After Recreate Receipt	Name, Quantity	Holds the list of field names that has to be updated after the receipt has been recreated.
Template Fields	Name, Lot Name, Quantity	Holds the list of field names that needs to be copied the visit template.
Signature Body Text Field: 2	Name	Holds the field name that is used in the signature body text.
Validate PickMaps in Extended Pick Mode	N	Holds either Y or N. Value equals Y for turning on the PickMaps validation.
Signature Body Text Field: 1	Quantity	Holds the field name that is used in the signature body text.

Pharma GA Call Products Detailed User Properties

The following table describes the user properties that apply to the class CSSBCProductDetailed.

User Property Name	User Property Value	Description
Max Auto Generated Priority	*Number* 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	*Field1,field2,...* 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.

Pharma Professional Call BC User Properties

The following table describes the user properties that apply to the Pharma Professional Call BC.

Name	Value	Description
SuppressSubmitConfirmation	N	Added to suppress confirmation dialog box when submitting a call.
Deep Copy 2	LS Pharma Samples Request BC	Copies the Sample Requests when the user clicks New Sample Drop.
Named Method 3	`"LSCopyFieldValue", "INVOKE", "Pharma Call Sample Dropped", "LSCopyFieldValue"`	Invoked the BS method on Promo Item BC.
Named Method 4	`"LSCopyFieldValue", "INVOKE", "Pharma Promotional Items Dropped", "LSCopyFieldValue"`	Invoked the BS method on Promo Item BC.
Named Method 5	`"LSCopyFieldValue", "INVOKE", "LS Pharma Samples Request BC", "LSCopyFieldValue"`	Invoked the BS method on Sample Request BC.
Required Fields: Contact Call	<..., ..., >	Holds the list of call record fields required to be populated before submitting a Contact Call.
Required Fields: Accounts Contact Call	<..., ..., >	Holds the list of call record fields required to be populated before submitting Accounts Contact Call.

Name	Value	Description
Submit Call Copy From Field 1	Call Date	Name of the Call Date field to copy back to the Position BC when submitting the Call.
Submit Call Copy From Field 2	Next Call Date	Name of the Next Call Date field to copy back to the Position BC when submitting the Call.
Submit Call Copy From Field 3	Next Call Objective	Name of the Next Call Objective field to copy back to the Position BC when submitting the Call.
Submit Call Copy To Field 1	Pharma Last Professional Call Date	Name of the field setting in the Position BC, when submitting the Call.
Submit Call Copy To Field 2	Pharma Last Professional Next Call Date	Name of the field setting in the Position BC, when submitting the Call.
Submit Call Copy To Field 3	Pharma Last Professional Next Call Obj	Name of the field setting in the Position BC, when submitting the Call.
Submit Call Parent Field Id	Contact Id	Name of the field to set the Id for the Call.

Pharma Professional Call - CE BC User Properties

The following table describes the user properties that apply to the Pharma Professional Call - CE BC.

Name	Value	Description
Validation Results View	LS Pharma Contact Call Validation Results View - CE	Holds the name of the view which displays the validation results.
Sampling Rules	CONTACT SAMPLING RULE, EMPLOYEE SAMPLING RULE, SRE PROFESSIONAL RULE	Each rule specified in the user property is evaluated using the validation engine.
Refresh BC List	LS Pharma Call Samples Dropped VBC - CE, LS Pharma Call Samples Requested VBC - CE, LS Pharma Call Promotional Items Dropped VBC - CE, LS Pharma Call Products Detailed VBC - CE	Holds the list of visual business component names that needs to be refreshed.
Template Components	LS Pharma Call Samples Dropped VBC - CE, LS Pharma Call Samples Requested VBC - CE, LS Pharma Call Products Detailed VBC - CE, LS Pharma Call Promotional Items Dropped VBC - CE	Holds the list of component names which has to be copied from call template.

Pharma Promotional Items Dropped - CE User Properties

The following table describes the user properties that apply to the Pharma Promotional Items Dropped - CE BC.

Name	Value	Description
CleanUp Search Spec	`[Priority] <= 0`	Specifies the condition when the clean up on the search specification needs to be done.

Action BC User Properties

The following table describes the user properties that apply to and are defined in the standard Action BC. These user properties are involved in the display of activities in home page calendar applets such as the eCalendar Daily Applet Home Page (which is based on the CSSSWEFrameCalGridLS class).

Name	Value	Description
LS Calendar Tooltip Field	LS Calendar Tooltip **Note:** This is a calculated field.	Specifies the field name used to display the tooltip in the calendar applet.
LS Calendar Display Text Field	LS Calendar Display Text **Note:** This is a calculated field.	Specifies the field name used to display the text in the calendar applet.
LS Calendar Icon Field	LS Calendar Icon **Note:** This is a calculated field.	Specifies the field name used to display the icon in the calendar applet.

30 Configuring Data for Oracle Pharma Sales Analytics

Configuring Data for Oracle Pharma Sales Analytics

This appendix contains information about how to populate data in the Siebel Pharma application to meet the requirements of Oracle Pharma Sales Analytics. The information is for Siebel Pharma and Oracle Pharma Sales Analytics implementation teams, Siebel Pharma application administrators and trainers. It assumes that you are familiar with the functionality and conventions of working with and administering the Siebel Pharma application.

For further information about transactional data extract, transform and load (ETL) rules of Pharma Sales Analytics, see *Oracle Business Intelligence Applications Installation and Configuration Guide.*

This appendix contains information about the following topics:

- *Configuring Product Hierarchies and Product Costs*
- *Configuring Product Catalog and Category Hierarchies*
- *Setting Up Sales Objectives*
- *Entering Call Activity Data*
- *Configuring Sales Territories for Pharma Sales Analytics*
- *Creating Target Lists Using Oracle Business Intelligence*

Transactional Data Requirements

Oracle Pharma Sales Analytics is a set of prebuilt analytical applications to support the analysis and reporting needs of sales and marketing users. The Oracle Pharma Sales Analytics applications are built on the Oracle Business Analytics Warehouse, which is a unified data repository for all customer-centric data to support the analytical requirements of Siebel Pharma Applications.

The Oracle Business Analytics Warehouse contains a number of Business Analytics Warehouse tables that are specific to Oracle Pharma Sales Analytics. These tables support the analysis of data stored in the Siebel Pharma application, as well as data from external syndicated data sources. The Oracle Business Analytics Warehouse contains a set of ETL (extract-transform-load) processes that take data from the Siebel Business Applications transactional data (OLTP) and loads this data into the Oracle Business Analytics Warehouse tables.

To implement Oracle Pharma Sales Analytics successfully you must understand the key entities and relationships in Oracle's Siebel Pharma application that Oracle Pharma Sales Analytics uses.

The Pharma Sales Analytics ETL processes impose some requirements on how the data must be configured and populated in the Siebel Pharma application in order to minimize the need for configuring data entities, relationships, and hierarchies within the Oracle Pharma Sales Analytics application.

The Oracle Pharma Sales Analytics ETL rules are configured to source data from specific, standard Siebel Pharma transactional database tables and columns. These database tables and columns are mapped to standard Siebel Pharma business components, screens and views. The Pharma Sales Analytics ETL rules require that data is populated in a

standard way to make sure that data is successfully loaded into the Oracle Business Analytics Warehouse tables without the need for additional configuration.

The following key entities must be configured and populated correctly in the Siebel Pharma transactional system:

- Product hierarchies and product costs
- Product catalog and category hierarchies
- Sales objectives

Configuring Product Hierarchies and Product Costs

This topic details the tasks performed by application administrators to configure product hierarchies and product costs. Oracle Pharma Sales Analytics provides a prebuilt product hierarchy that allows users to analyze and roll up call activity, medical events, sales and Rx data at the form strength, brand, submarket, and market levels. Oracle Pharma Sales Analytics also allows users to analyze sales and Rx data of competitor brands.

The following table shows the required relationships between each of the levels in the Product Level column.

Pharma Sales Analytics Product Hierarchy	OLTP Product Type	OLTP Product Level	Example	Parent Product	Cardinality
Form/Strength	Sample	3	Aracid 400 MG	Aracid	M:1
Product	Detail	2	Aracid	COPD	M:1
Product	Competitive Products	No Level	SlmAir	Asthma or COPD	M:1
Submarket	Submarket	No Level	COPD	Asthma	M:1
Market	Market	1	Asthma	No Parent	None

Oracle Pharma Sales Analytics also allows users to analyze ROI of call detailing and sampling. The underlying cost information used in these ROI calculations is sourced from the product cost fields within the Siebel Pharma application.

To configure product hierarchies and product costs

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	The name of the form strength, product/brand, submarket, or market.

Field	Comments
Product Type	The type of product as listed in the previous table.
Parent Product	The parent product of this product within the product hierarchy. The appropriate parent product must be selected for the current product level as listed in the previous table. Market type products do not have a parent product.

3. Drill down on the product.
4. Click the More Info tab.
5. In the Level field, select the correct numerical value for the level as listed in the previous table.
6. If the Product Type is Sample, then in the Sample Cost field enter the appropriate sample cost.
7. If the Product Type is Detail, then in the Promo Cost field enter the appropriate promotional cost.
8. Repeat Step 2 through Step 7 for the remaining products in the product hierarchy.

For more information about managing products, see *Managing Products for Life Sciences*

Configuring Product Catalog and Category Hierarchies

This topic details the tasks required to configure product catalogs and category hierarchies performed by application administrators. Oracle Pharma Sales Analytics allows users to use a number of prebuilt alternate product hierarchies to analyze and roll up sales and Rx data. These prebuilt hierarchies are as follows:

- Manufacturer Product Category
- Application Form Product Category
- ATC (Anatomical Therapeutic Class) Product Category
- User Code (USC) Product Category
- Chemical Product Category

  The following table shows the Standard Product Hierarchy along with the prebuilt alternative product hierarchies.

Standard Product Hierarchy	Manufacturer Product Hierarchy	Application Form Product Category	ATC Product Category	User Code Product Category	Chemical Product Category
Market	Manufacturer	Application Form I	ATC I	USC I	Family
Submarket	Product	Application Form II	ATC II	USC II	Subfamily
Product	Product	Application Form III	ATC III	USC III	Subfamily

Standard Product Hierarchy	Manufacturer Product Hierarchy	Application Form Product Category	ATC Product Category	User Code Product Category	Chemical Product Category
Form/Strength	Product	Application Form IV	ATC IV	USC IV	Subfamily

The Oracle Pharma Sales Analytics ETL uses data stored in the standard Siebel Pharma Product Catalog and Category application screens to create these alternate hierarchies.

To configure product catalog and product hierarchies

1. Navigate to the Administration - Catalog screen, then the Catalogs view.
2. In the Catalogs list, create a new record and complete the necessary fields.

Field	Comments
Name	The name of the alternate Product hierarchy, for example, R-Respiratory for an ATC hierarchy for Asthma products.
Description	A general description of the catalog.
Effective Start Date	Current date.
Private	The product catalog is only used by the Oracle Pharma Sales Analytics ETL. Select this field to prevent the catalog from being visible to other users within the Siebel Pharma Application.

3. Drill down on the Catalog.
4. In the Category list, create a new record for the highest (first) level of the hierarchy and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Name	Name of the hierarchy level (for example, R3-Bronchodilators and Anti-asthma Preparations for the highest level in an ATC hierarchy for Asthma products).
Display Name	Display name of the hierarchy level (for example, R3-Bronchodilators and Anti-asthma Preparations for the highest level in an ATC hierarchy for Asthma products).
Effective Start Date	Current date.

Field	Comments
Usage	From the Pick Category Usage Type dialog box, select one of the following usage types to set the type of alternate Product Hierarchy, and then click OK: o ATC o Application Form o Manufacturer o USC o Chemical
Private	The Product Catalog is only used by the Oracle Pharma Sales Analytics ETL Check this flag to prevent the Catalog from being visible to other users within the Siebel Pharma Application.

5. For each lower level in the hierarchy, create a new record in the Category list, and repeat Step 4.
6. Set the relationships between the levels by using the Demote level button.
7. For the lowest level in the hierarchy only, click the Products link under the Categories tab.
8. Create a new record in the Product list, and select the appropriate Product record, which is the Form/Strength level Product in the standard Product hierarchy.

   This action allows Oracle Pharma Sales Analytics to link the alternate product hierarchy to the standard product hierarchy.

Setting Up Sales Objectives

This topic details the tasks that users must do to set up correctly the sales objectives in Oracle Pharma Sales Analytics. Oracle Pharma Sales Analytics allows users to analyze actual call activities, sales, and Rx results and compare them with their sales objective targets. Users must enter the sales objectives data correctly in the Siebel Pharma Application's Objectives screens to enable this analysis.

To set up sales objectives

1. Navigate to the Objectives screen, then the Retail Objectives List view.
2. In the Retail Objectives list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Unit	A unit can only be NRx, TRx, indirect sales, indirect units, sales amounts, sales units, or number (#) of calls.

Field	Comments
Product	Select only one product at the appropriate product level. For a unit value of NRx, TRx, or number (#) of Calls, then the product value must be detail. For a unit of indirect sales, indirect units, sales amounts, or sales units, then the product level is form/strength.
Team	Only one team member can be the owner of each objective.

3. In the Retail Objectives list, drill down in the Objective of a record.
4. Click the Target Contacts tab.
5. In the Target Contacts list, create a new record for each target contact you want to add and complete the necessary fields.
   For example, for each target contact that you add, enter a value in the Target Value field.
6. Click the Target Accounts tab.
7. In the Target Accounts list, create a new record for each target account you want to add and complete the necessary fields.
   For example, for each target account that you add, enter a value in the Target Value field.

Entering Call Activity Data

Oracle Pharma Sales Analytics allows users to analyze the Account Calls, Contact Calls, and Attendee Calls data entered in the Siebel Pharma application. The Oracle Pharma Sales Analytics ETL requires a number of key call activity fields to be populated and the data to be entered correctly so that the Oracle Business Analytics Warehouse is loaded.

The following table outlines which fields must be populated for Oracle Pharma Sales Analytics.

Records	Fields That Must Be Populated
Account Call - Header Records	• Status (set to Submitted) • Account • Address • tart Date
Contact Call - Header Records	• Status (set to Submitted) • Last Name, First Name • Address • Start Date
Attendee Call - Header Records	• Status (set to Submitted) • Last Name, First Name • Address • Start Date

Records	Fields That Must Be Populated
Call Products Detailed - Child Records	• Product • Priority • Indication
Samples Dropped - Child Records	• Name • Quantity
Promotional Items Dropped - Child Records (Contact calls)	• Name • Quantity

Configuring Sales Territories for Pharma Sales Analytics

This topic describes how to perform the following tasks:

- *Creating Primary Sales Force Hierarchies*
- *Creating Sales Territories*
- *Creating Alternate Sales Force Hierarchies*

Creating Primary Sales Force Hierarchies

Oracle Pharma Sales Analytics provides a prebuilt sales hierarchy configuration that determines the rollup and visibility of sales, Rx and call activity data for the different levels of users within a sales organization. This configuration includes prebuilt aggregation tables and de-duplication of data at each level of the sales hierarchy to support accurate analysis and improved performance. The primary sales force hierarchy is configured as a position hierarchy within the Siebel Pharma application, with the sales territory level position following the position hierarchy. This topic details the tasks that application administrators must perform to configure the position hierarchy for use in Oracle Pharma Sales Analytics.

To create a primary sales force hierarchy

1. Navigate to the Administration - Group screen, then the Positions view.
2. In the Positions list, create a new high-level position record in the Sales Force Hierarchy and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Division	Division for the primary sales force hierarchy.
Position	Position associated with the primary sales force hierarchy.

Field	Comments
Position Type	Select the position type from the drop-down list.

3. For each level that appears after the sales hierarchy, repeat Step 2 down to the sales territory level position.
4. In the Parent Position field for each record, select the Position for the level preceding the current Position.

   The prebuilt Oracle Pharma Sales Analytics configuration supports the sales hierarchy levels shown in the following table.

Field	Comment	Comments
Organization	Highest level of the sales organization that is sometimes referred to as *Franchise*. For example, *Respiratory Franchise* refers to a sales force commissioned to promote respiratory products. This level does not have any parents.	None
Sales Force	Child of Organization. Refers to a sales force promoting products within a sales organization.	M:1
Area	Child of Sales Force. Refers to a large geographic sales area, such as US East, US West, or US South.	M:1
Region	Child of Area. Refers to a sales geographic region.	M:1
District	Child of Region. Refers to a sales geographic district.	M:1
Territory	Child of District. Refers to a sales geographic territory composed of ZIP codes, bricks, contacts, or accounts.	M:1

   All sales hierarchy levels must be created as positions and linked to a position hierarchy to populate correctly the Oracle Business Analytics Warehouse.
5. The lowest territory level position in the hierarchy must be the position associated with the assignment rule definition for the sales territory alignment, as described in *Creating Sales Territories*.

Creating Sales Territories

Sales territory alignments are used within Oracle Pharma Sales Analytics to assign sales and Rx data to the appropriate sales territory level positions. A sales territory alignment is the relationship between each sales territory position and a set of ZIP codes, bricks or accounts, or contacts. This territory alignment relationship is created and managed as a set of assignment rules in the Administration - Assignment screens within the Siebel Pharma application.

The following procedure details the task that application administrators must perform to configure the assignment rules in Oracle Pharma Sales Analytics.

To create a new assignment rule

1. Navigate to the Administration - Assignment screen, then the Assignment Rules List view.
2. In the Assignment Rules list, create a new assignment rule record and complete the necessary fields.
    - In the Objects to be Assigned field, select either Account or Contact from the Assignment Object dialog box, and click OK.
    - In the Rule Group field, select Default Rule Group from the Pick Rule dialog box, and click OK.
    - In the Activation field, enter the rule activation date.
    - In the Name field, type in the name of the new assignment rule.
    - Drill down on the assignment rule Name field.
3. Click the Criteria tab
4. In the Assignment Criteria list, create new criteria records for the assignment rule and complete the necessary fields.
    - In the Rule Criterion field, select the Assignment Criteria - options are described in the following table.

    > **Note:** A territory can have one or more criteria defined for it, depending upon the territory alignment requirements (for example, you can assign both account ZIP code and contact ZIP code to the same territory).

Assignment Criteria	Assignment Type	Description	Cardinality
Account ZIP Code	ZIP Code	Assigns an account ZIP code or group of ZIP codes to a sales territory.	M:M
Contact ZIP Code	ZIP Code	Assigns a contact primary address ZIP code or group of primary address ZIP codes to a sales territory.	M:M
Account Brick	Brick	Assigns an account brick or group of bricks to a sales territory.	M:M
Contact Brick	Brick	Assigns a contact primary brick or group of bricks to a sales territory.	M:M
Account	Account	Assigns an account name or groups of contacts to a sales territory.	M:M

Assignment Criteria	Assignment Type	Description	Cardinality
Contact	Contact	Assigns a contact name or group of contact names to a sales territory.	M:M

- In the Comparison Method field, select Compare to Object.
- For each assignment criteria record created, add the appropriate records for the criteria within the given territory.

  For example, for an account ZIP code criteria create a new record for each ZIP code range, and enter values in the ZIP Code Low and ZIP Code High fields.

5. Click the Position Candidate tab.
6. In the Assignment Rule Position list, add the appropriate position for the given territory.
7. Repeat the process for each sales territory that must be defined.

Creating Alternate Sales Force Hierarchies

Oracle Pharma Sales Analytics supports the ability to analyze Rx script data and compare it with alternate sales force organizational structures. These alternate sales force hierarchies can support co-marketing sales organizations where Rx scripts might be 100% allocated to both sales forces, as well as Mirror Sales Forces where Rx Script allocation might be shared between the Sales Forces.

You can assign scripts to each alternate sales representative by:

- Using a report or metadata calculation based on the attribute of the W_POSITION_D dimension table
- Creating a new set of aggregation tables to de-duplicate scripts

The alternate sales force hierarchies are configured as an additional set of positions and alignment rules within the Siebel Pharma application. This topic details the tasks that application administrators perform to configure these positions and alignment rules.

> **Note:** The allocation of Rx scripts to alternate sales force positions uses an allocation percentage that is stored in the S_POSTN.OWNER_ALLOC_PCT column in the Siebel Pharma transactional database. This database column is not exposed in the standard Siebel Pharma Application. To complete the steps for creating the alternate sales force hierarchies, add the OWNER_ALLOC_PCT column to the position business component, and expose it in the Position List Applet in the Siebel runtime repository.

To create an alternate sales force hierarchy

1. Navigate to the Administration - Group screen, then the Positions view.

2. In the Positions list, create a new high-level position record in the Sales Force Hierarchy and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Division	Division for the alternate sales force hierarchy.
Position	Position associated with the alternate sales force hierarchy.
Position Type	Select the position type from the drop-down list.

3. For each of level that appears after the Sales Hierarchy, repeat Step 2 down to the Sales Territory level position.
4. In the Parent Position field for each record, select the Position for the level preceding the current Position.

   The prebuilt Oracle Pharma Sales Analytics configuration supports the sales hierarchy levels described in the following table.

Level	Description	Cardinality to Parent
Organization	The highest level of the sales organization that is sometimes referred to as *Franchise*. For example, *Respiratory Franchise* refers to a sales force commissioned to promote respiratory products. This level does not have any parents.	None
Sales Force	Child of Organization. Refers to a sales forces promoting products within a sales organization.	M:1
Area	Child of Sales Force. Refers to a large geographic sales area, such as US East, US West, or US South.	M:1
Region	Child of Area. Refers to a sales geographic region.	M:1
District	Child of Region. Refers to a sales geographic district.	M:1
Territory	Child of District. Refers to a sales geographic territory composed of ZIP codes, bricks, contacts, or accounts.	M:1

5. Create all levels for the sales hierarchy as positions, and link them to a position hierarchy to populate the Oracle Business Analytics Warehouse correctly.

6. For the territory level position in this new alternate hierarchy, set the Position Type field to either *mirror, swat,* or *job share* as appropriate for the alternate sales force.

   Note: Select these position types for the territory level positions in the alternate sales force.

7. In the new Owner Allocation field that has been exposed in the Position List Applet, enter the percentage allocation of scripts as a decimal for the alternate territory level position.

   The Pharma Sales Analytics ETL populates the value from the Owner Allocation Percentage field to a column in the Position Dimension that can then be used to calculate measures and aggregates for Rx script allocations.

8. After the alternate sales force positions and hierarchy have been created, you must create an additional alignment rule for the alternate sales territory as an assignment rule.

   For more information about creating these additional Assignment Rules, see *Creating Sales Territories*.

   Note: The alternate sales force territory level position must be selected as the candidate position for these assignment rules.

Creating Target Lists Using Oracle Business Intelligence

Target List Creator enables the automatic import of customer lists derived from an Oracle BI query into Siebel List Management. This functionality is enabled through the Oracle Business Intelligence Presentation Services and can be used from Oracle BI Interactive Dashboards or Oracle BI Answers integrated with the Siebel Enterprise application.

Note: This functionality is certified and tested with the Siebel Pharma Mobile Web Client, as well as the Siebel Pharma Connected Client and Oracle Pharma Sales Analytics application.

This topic describes the following:

- *About Target List Creator*
- *Using Target List Creator with Siebel Pharma Applications in Connected Mode*

About Target List Creator

The following topics outline the components and functionality of the target list creator:

Components

The following components support the Target List Creator functionality:

- **Create Target List view**. Oracle Business Intelligence Presentation Services includes a report view called Create Target List that displays a link used to initiate a business service in the Siebel Pharma application.
- **LS Analytics Target Service business service.** The Siebel Pharma application includes a business service called LS Analytics Target Service that provides the data integration capability.

When Target List Creator is used in connected mode, both the Oracle BI Presentation Services and Siebel Application Interface must reside on the same machine so that the Create Target List link can be used within an Oracle BI report. The Oracle BI Open Intelligence Interface also needs to be installed and configured on the Siebel Pharma application

server to enable connectivity between the Siebel Pharma business service and the Oracle BI Server. For more information, see *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

Functional Overview and Process

The following outlines the functionality and general process steps of the Target List Creator components:

1. When a user clicks the Create Target List link in an Oracle BI Interactive Dashboard report, a JavaScript function prompts the user to enter a name for the new list. The function then passes this name and the logical SQL for the Oracle BI Query through the Siebel Pharma application to the LS Analytics Target Service business service.
2. The LS Analytics Target Service business service:
   a. Verifies that the field representing the row Id of the target object is the first column selected in the query. For example, if you create a target list for Contacts, then in the default configuration the Contacts.ROW_ID column must be the first column in the query.
   b. The Oracle BI presentation columns that represent the Row Id values are configured in user properties for the LS Analytics Target Service business service. The Account Row Id Fields user property maps to the Oracle BI presentation column for the Siebel Account Row Id. The Contact Row Id Fields user property maps to the Oracle BI presentation column for the Siebel Contact Row Id. If the Oracle BI presentation columns used to store the Row Id values differ from the default configuration, then the column mappings for the user properties can be changed in the Siebel runtime repository.
   c. Then a new target list header record is created in the Siebel Pharma application's database. The List Name is set to the Name entered by the user in the Oracle Business Intelligence dialog box and passed from Oracle Business Intelligence to Siebel CRM.
   d. The LS Analytics Target Service business service then uses the Oracle BI ODBC DSN (OpenDataBase Connectivity Data Source Name) name defined in the Siebel Pharma application's AnalyticsDataSrc to connect back to the Oracle BI server.
   e. The business service executes the logical SQL passed from Oracle Business Intelligence, iterates through the results, and creates a new List Item for each record.
   f. The validate targets user property on the business service can be turned on to provide additional validation by ensuring that the record in Oracle Business Intelligence already exists in the user's local Siebel database. Possible values for the user property are N or Y. The default value is N.

   > **Note:** The business component used for the contact target items is List Mgmt List Member, while the business component used for account list items is SLM List Member - Account. Both of these business components must be present in the List Mgmt business object.

3. After the list is created, the application automatically navigates to the view set in the Business Service's Redirect View User Property. This view must be associated with the List Mgmt Business Object and must have the List Mgmt Lists Business Component as its primary business component. The default view is My List Mgmt Lists View.

Using Target List Creator with Siebel Pharma Applications in Connected Mode

You can also use the Target List Creator with the Siebel Pharma application and Oracle Pharma Sales Analytics in connected mode. This topic lists the tasks that you must carry out to verify the Siebel Pharma application's configuration to support using the Target List creator in connected mode:

- *Configuration Changes to the Siebel Business Application*

- *Configuring the Application's Server Component Parameters and Enterprise Profile*

Install and Configure the Oracle Business Open Intelligence Interface

The LS Analytics Target Service business service uses an ODBC DSN to connect back to the Oracle BI Server and execute the Oracle BI logical SQL passed into it. This ODBC DSN needs to be setup using the Oracle BI Open Intelligence Interface (ODBC) client, and requires that this client be installed on the Siebel Pharma application server. To install and configure the Oracle BI Open Intelligence Interface, see *Oracle Business Intelligence Applications Installation and Configuration Guide*.

Configuration Changes to the Siebel Business Application

To enable the LS Analytics Target Service Business Service to be called from the Siebel browser client, the Business Service name has to be present as a ClientBusinessService user property for the Siebel Business Application being used.

To verify the LS Analytics Target Service business service

1. In Siebel Web Tools, find the Siebel Life Sciences application record in the Application objects list.
2. In the Application User Prop list verify that the following entry exists:

```
ClientBusinessService10 = LS Analytics Target Service
```

Configuring the Application's Server Component Parameters and Enterprise Profile

The Oracle BI Open Intelligence Interface ODBC DSN connection must be configured as a new data source profile for the Siebel Enterprise and must be associated with the Siebel Business Application's Object Manager configuration.

To configure a new data source profile and associate with AnalyticsDataSrc

1. Log in to the Siebel Business Application as an administrator.
2. Navigate to the Administration - Server Configuration screen, then the Enterprises view.
3. Click the Profile Configuration tab.
4. Search for the AnalyticsDataSrc in the list. If it does not exist, then copy the existing ServerDataSrc record, and rename the copy to AnalyticsDataSrc.
5. Update the following parameters with the values indicated:

```
DSDLLName = sscdsacon
DSConnectString = AnalyticsWeb
DSTableOwner = <blank>
```

6. Click the Component Definitions tab.
7. In the Component list, search for the appropriate Application's Object Manager.

   For example, for Oracle's Siebel Pharma, search for ePharmaObjMgr_ENU.
8. With the Component selected, click Menu (the cogwheel icon), and then select Start Reconfiguration.

9. Search for *OM - Named Data Source name* in the Component Parameters list.
10. Append the current list at the end with AnalyticsDataSrc.
11. Click Menu (the cogwheel icon), and select Commit Reconfiguration from the drop-down list.
12. Log out of the application.
13. Log in to the server manager, and restart the component by executing the following commands:

    ```
    shutdown comp ePharmaObjMgr_enu
    startup comp ePharmaObjMgr_enu
    ```

14. Log in to the application again.

    The Create Target List functionality is enabled.