



IQVIA GLOBAL PRODUCT MANAGEMENT

Enhanced Views (Entity360) Product Vision



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Product Vision

- Create a flexible product feature that enables our customers to configure and deploy dynamic data views on subject areas, e.g.

Administrator Flow

Create and Manage Curated Views

- Ability to Create New View, Create new View from Template, or Modify Existing Views using Ellipses/Delete
- Status shows Draft, Active and views with changes not yet published.

The screenshot displays the 'Enhanced Views' management interface. At the top, there is a navigation bar with the IQVIA Technologies logo and a breadcrumb trail: 'Enhanced Views > Administer'. Below this, the title 'Enhanced Views' is followed by two buttons: '+ New View' and '+ New View From Template', and a search input field labeled 'Search for a View or Tag'. The main content is a table with the following columns: View, Tag(s), Display, and Status. The table lists six views: Health Care Professionals (Draft), Products (Active), Payers (Active - Changes Pending), Health Care Organizations (Active), Top Prescribers (Active), and Books of Business (Active). Each row includes icons for delete, play, and a menu. At the bottom, there is a footer with 'Page Size', 'Items 1 - 6', and 'Page 1 of 1'.

View	Tag(s)	Display	Status	
Health Care Professionals	HCP	Hub and Spoke	Draft	🗑️ ▶️ ⋮
Products	Product	Hub and Spoke	Active	🗑️ ▶️ ⋮
Payers	Payer	Hub and Spoke	Active - Changes Pending	🗑️ ▶️ ⋮
Health Care Organizations	HCO	Smart Wheel	Active	🗑️ ▶️ ⋮
Top Prescribers	HCP	Tree View	Active	🗑️ ▶️ ⋮
Books of Business	Payer	Network	Active	🗑️ ▶️ ⋮

Administrator Flow

Creation of New View

- Administrator must enter the Name of their View, and provide it with tags (could be the subject area).
- Can add a description to the View.
- A toggle allows for the View to be used in Data Steward flow.

The screenshot shows the IQVIA Technologies Administrator interface. At the top left is the IQVIA Technologies logo. The breadcrumb navigation path is: Enhanced Views > Administer > Create New. Below the breadcrumb is a progress indicator with four steps: 1. Create New (indicated by a downward arrow), 2. Foundation (circled), 3. Structure (circled), and 4. Configure (circled). The main form contains the following fields:

- Name ***: A text input field with the placeholder text "Enter a Enhanced View name".
- Tag(s)**: A text input field with the placeholder text "Enter Tags, separated by commas".
- Description**: A text area with the placeholder text "Describe this Enhanced View".
- Enable Data Stewardship**: A toggle switch currently in the off position.

At the bottom right of the form are two buttons: a grey "Cancel" button and a green "Save" button.

Administrator Flow

Foundation

- Administrator chooses the Tables that will be used in the new View, in a tree hierarchy of Database, Schema, Table/Views
 - Assumption: the data in these tables are ready to be consumed as they are and require no additional transformation.
- A second section allows the administrator to configure joins between the table selected in the first section (like in Information Mapping).
- The two sections are collapsible (can be minimized).

The screenshot displays the IQVIA Technologies Administrator Flow interface. At the top, the breadcrumb trail reads "Enhanced Views > Administer > Objects". A progress indicator shows four steps: "Create New" (checked), "Foundation" (current step), "Structure", and "Configure".

The main content area is divided into two sections. The top section is a tree view showing a hierarchy of database objects. The "ODP_CORE_PUBLISH" folder is expanded, revealing several tables with checkboxes: "HCP" (checked), "Affiliations", "Interests", "Influences", "Patient Load" (checked), "Social Activity", and "Prescriptions". Other folders include "ODP_CORE_ARCHIV", "ODP_CORE_STAGING", "ODP_CORE_STREAM", and "ODP_RM_DATAMART".

The bottom section is a table of existing joins:

Join Name	Join Type	Left Table	Right Table
Join 1	InnerJoin	HCP	SCIENTIFIC_INTERESTS
Join 2	LeftOuterJoin	HCP	PATIENT_LOAD

Below the table, there are page size options (15, 50, 100, 500) and a status indicator "Items 1-2 of 2".

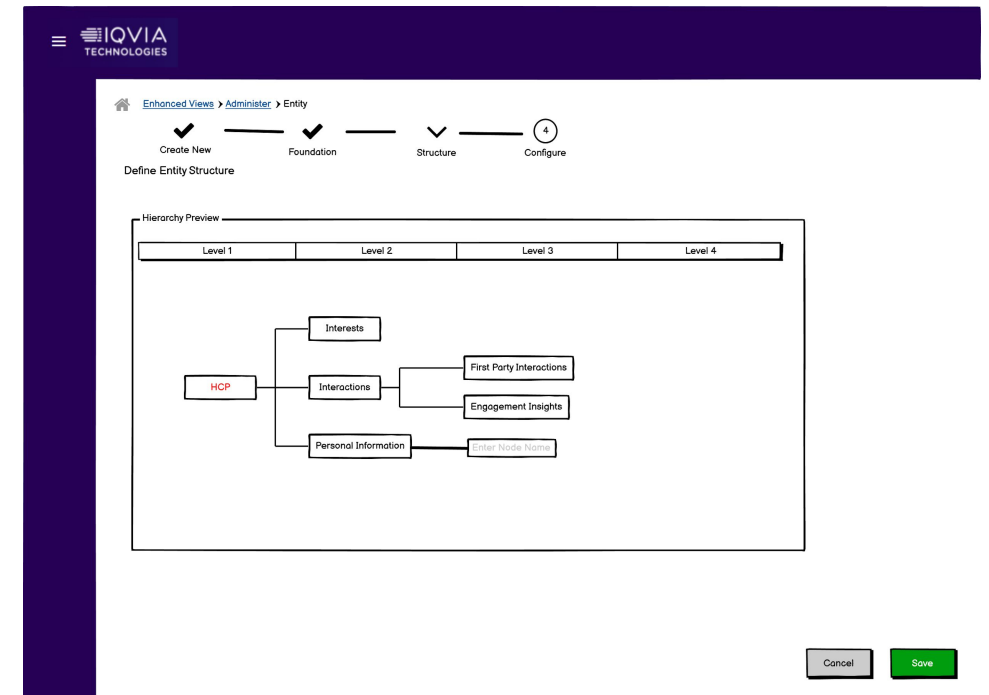
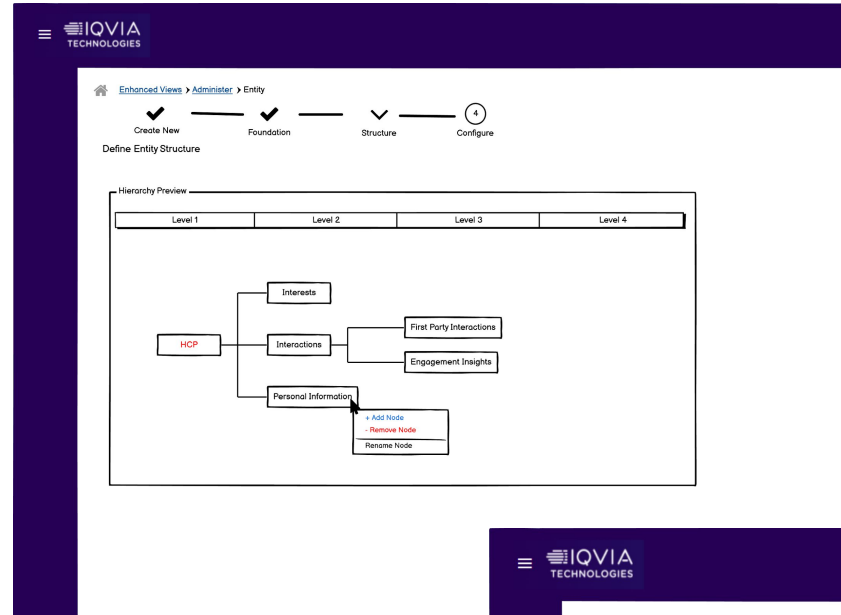
An "Add Table Join" dialog box is open on the right side of the screen. It contains the following fields:

- Join Name*
- Join Type* (Select Join Type dropdown)
- Left Table* (Select Left Table dropdown)
- Right Table* (Select Right Table dropdown)
- Key 1 section with Left Table Key* and Right Table Key* (both dropdowns)
- + Add Keys button
- Cancel and Save buttons at the bottom.

Administrator Flow

Structure

- The Administrator creates a hierarchy of Nodes, which are used later to configure the view. The single Node on level 1 is the central Entity of this view, and all the data will be related to it. In other words, it is the Subject Area of this view.
- Arriving at this screen, the user is prompted to name their central node. They can then right click on a node to Add a child node on the subsequent level, or delete a node, which also deletes its children. Nodes can be renamed.
- There can only be 4 levels, but each level does not have a node limit.
- A path is the sequence from the Central Node to its lowest level. The rightmost nodes of each path are the lowest level of that path, and are the nodes where columns are added.



Administrator Flow

Configure – Columns

- The Administrator must now define the attributes of the nodes and finalize the List and Analyze view.
- The Admin can give records in their view a name (i.e. instead of calling Entities “Records” the system will refer to them as whatever is entered here).
- The admin must now configure columns. These are fields from the tables/views selected in Foundation.
 - **Display Name** is what the column is called in List and Analyze.
 - **Display Order** is the order the columns appear in List.
 - **Include In List** is a flag that controls whether the column is just in Analyze, or in List and Analyze.
 - **Include in Export** is a flag that will add the column to a List’s export, but not the List itself.
 - **Node** is the node from the Structure step, and the admin has a picklist to choose the lowest level nodes of each path.
 - **Default Sort** can be assigned to only 1 Column and represents the order that Records are Displayed in List

Field	Display Name	Display Order	Include in List	Include in Export	Node	Default Sort
HCP_FIRST_NAME	First Name	1	Yes	Yes	Personal Information	Settings, Delete
HCP_LAST_NAME	Last Name	2	Yes	Yes	Personal Information	Descending, Settings, Delete
HCP_STREET_ADDRESS	Address	3	Yes	Yes	Personal Information	Settings, Delete
HCP_CITY	City	4	Yes	Yes	Personal Information	Settings, Delete
F2F_INTERACTIONS	Face-to-Face Calls		No	Yes	First Party Interactions	Settings, Delete
HCP_SPECIALTY	Specialty	5	Yes	Yes	Interests	Settings, Delete

Administrator Flow

Configure – Filters and List Preview

- The Administrator can add Filters to the View, to limit the number of Records that are pulled in. With no Filter, all records from the Column section are pulled in, using the joins configured in Foundation.
- When adding a Filter, the Admin must enter a simple statement for a chosen field, (we should support <, >, =, >=, <= for numeric fields, standard text filters like EQUALS, CONTAINS, DOES NOT CONTAIN, and conditions like AND/OR).
- The List preview should be a dynamically updating table that shows the results of the Column section.

Field	Display Name	Display Order	Include in List	Include in Export	Node	Default Sort
HCP_FIRST_NAME	First Name	1	Yes	Yes	Personal Information	
HCP_LAST_NAME	Last Name	2	Yes	Yes	Personal Information	Descending
HCP_STREET_ADDRESS	Address	3	Yes	Yes	Personal Information	
HCP_CITY	City	4	Yes	Yes	Personal Information	
F2F_INTERACTIONS	Face-to-Face Calls		No	Yes	First Party Interactions	
HCP_SPECIALTY	Specialty	5	Yes	Yes	Interests	

+ Add Filter

Field	Filter		
TRx_VOL	>300	⚙️	🗑️
TP_CAL_QTR	"CAL_QTR_1"	⚙️	🗑️
BRAND	"ARIZOLE" OR "PERIZOLE"	⚙️	🗑️

Records Retrieved Based on Filters:
2000

List Preview

First Name	Last Name	Address	City	Specialty
Andrew	Jones	123 Main Street	Montreal	Oncologist

Administrator Flow

Configure – Detailed View Configuration, Save/Publish

- The Administrator can choose how their Detailed View (**Analyze**) is displayed. The preview updates dynamically to show the chosen option. We should support 3 Modes, Hub and Spoke, Tabs and List with Tabs.
- Hub and Spoke should be disabled if the Administrator chose “Data Stewardship” when creating the view.
- Hub and Spoke is the Central Entity surrounded by the Nodes on Level 2 in the Structure step.
- In Hub and Spoke mode, The Central Entity must be a specific column, so the record name appears in the middle.
- The Administrator can now save their changes or Publish the view so Analysts/Data Stewards can use it.

The screenshot displays the 'Detailed View Configuration' interface. At the top, there is a 'Display Mode' section with three radio button options: 'Hub and Spoke' (selected), 'Tabs', and 'List with Tabs'. Below this is a 'Detailed View Preview' area. The preview shows a central hub with a circular image of a female doctor. Surrounding the hub are seven rectangular nodes connected by lines: 'Digital Behaviour' (top), 'Personal Info' (top-left), 'Interests' (left), 'Influencers' (bottom-left), 'Scientific Interests' (bottom), 'Market' (bottom-right), 'Interactions' (right), and 'Patient Load' (top-right). Above the hub, the word 'Title' is centered. At the bottom right of the configuration window, there are three buttons: 'Cancel' (grey), 'Save' (green), and 'Publish' (blue).

Analyst Flow

Enhanced View Selection

- Eventually, Administrators will create many Enhanced Views. The Analyst must choose what they want to work with from a list of Enhanced Views.
- Each view was given a name and tags by their creator. The Analyst can search for a View or Tag.
- A status indicator tells the Analyst that a view is either Active, or that the Administrator has a new version ready (saved), but not yet published. They can continue using the currently active version in the meantime.
- The Analyst clicks on a blue link for their chosen view to navigate to it.

The screenshot displays the 'Enhanced Views' management interface. At the top left is the IQVIA Technologies logo. Below it, a breadcrumb trail shows 'Enhanced Views > ...'. A search bar is present with the placeholder text 'Search for a View or Tag'. The main content is a table with the following data:

View	Changelog	Tag(s)	Display	Status
Health Care Professionals	⬇	HCP	Tabular	Active - Changes Pending
Products	⬇	Product	Hub and Spoke	Active
Payers	⬇	Payer	Hub and Spoke	Active
Health Care Organizations	⬇	HCO	Smart Wheel	Active
Top Prescribers	⬇	HCP	Tree View	Active
Books of Business	⬇	Payer	Network	Active

At the bottom of the table, there is a footer section with 'Page Size' on the left, 'Items 1 - 6' in the center, and 'Page 1 of 1' on the right.

Analyst Flow

Enhanced View – Record List

- The Analyst has chosen a view. Here, they have all the records pulled in that match the filters set up by the Administrator.
- They can search for a record, are shown the View's Description and Tags and can Export the list. The Export may contain more columns than the **List** below.
- This **List** is a table, with Columns reflecting the Admin's choices.
 - Columns appear left to right in the Display Order
 - Records are sorted by the Default Sort
 - Leftmost column (Display Order = 1) is a blue hyperlink that opens the Detailed View (**Analyze**)

The screenshot shows the 'Health Care Professionals' record list in the IQVIA Technologies system. The interface includes a search bar, a description, tags, and a table with columns for Record Name, Tag(s), and Current QTR Rx. An 'Export List' button is visible in the top right.

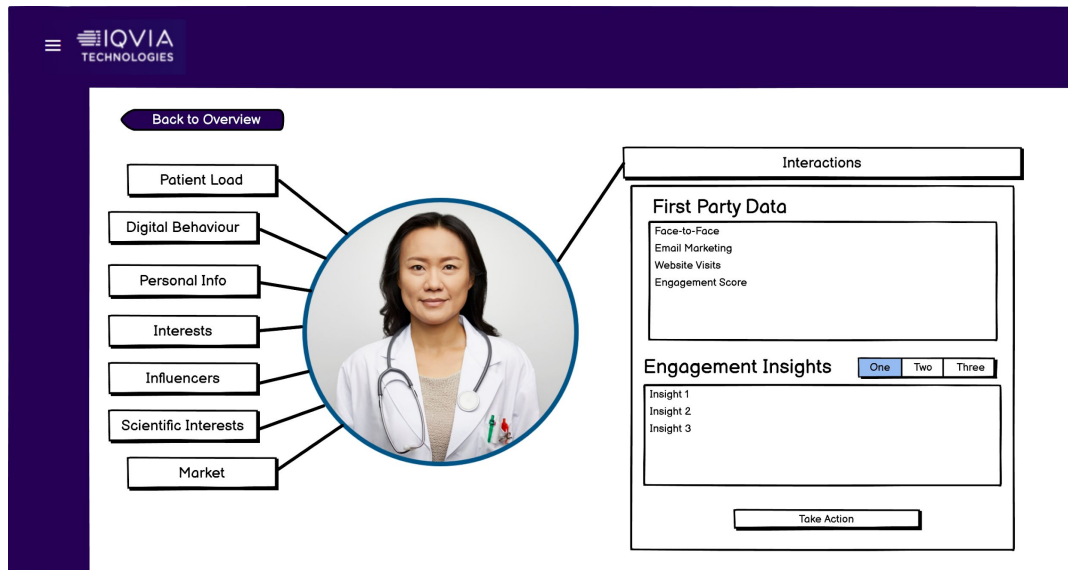
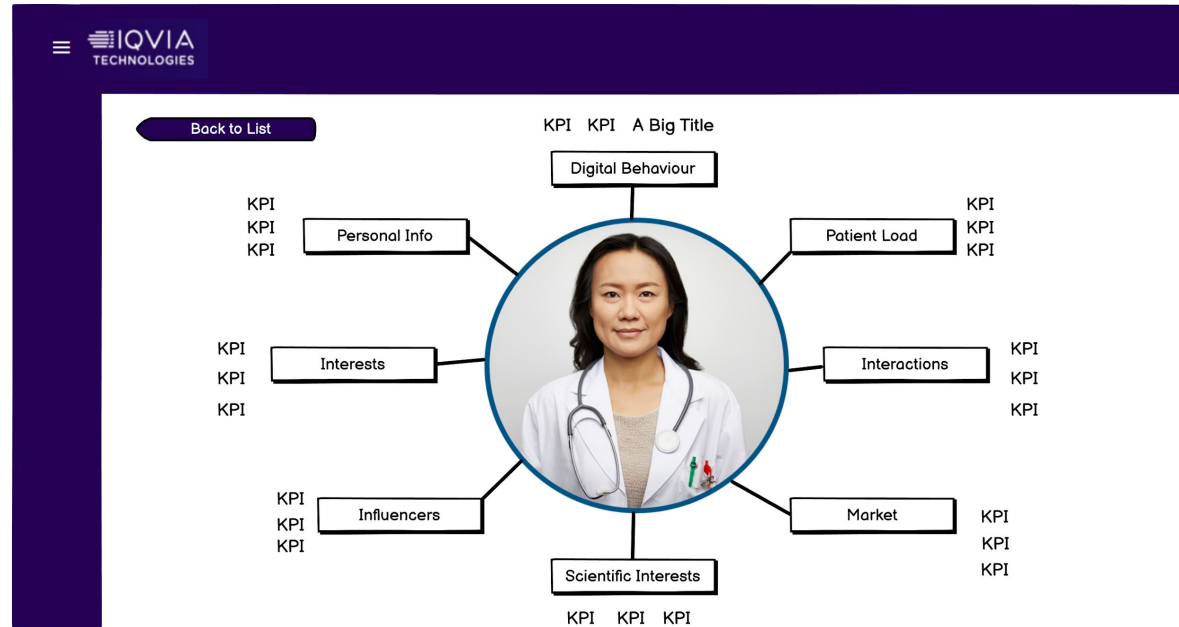
Record Name	Tag(s)	Current QTR Rx
Dr. Andrew Jones	High Prescriber	250
Dr. Michael Lynch	High Prescriber	300
Dr. Esther Stephens	High Prescriber	350
Dr. Avinob Roy	Low Prescriber	18
Dr. Renuka Balamurugan	Non Prescriber	0
Dr. Vince Kodikal	Non Prescriber	0

Page Size: Items 1 - 6 of Page 1 of 1

Analyst Flow

Enhanced View – Detailed View

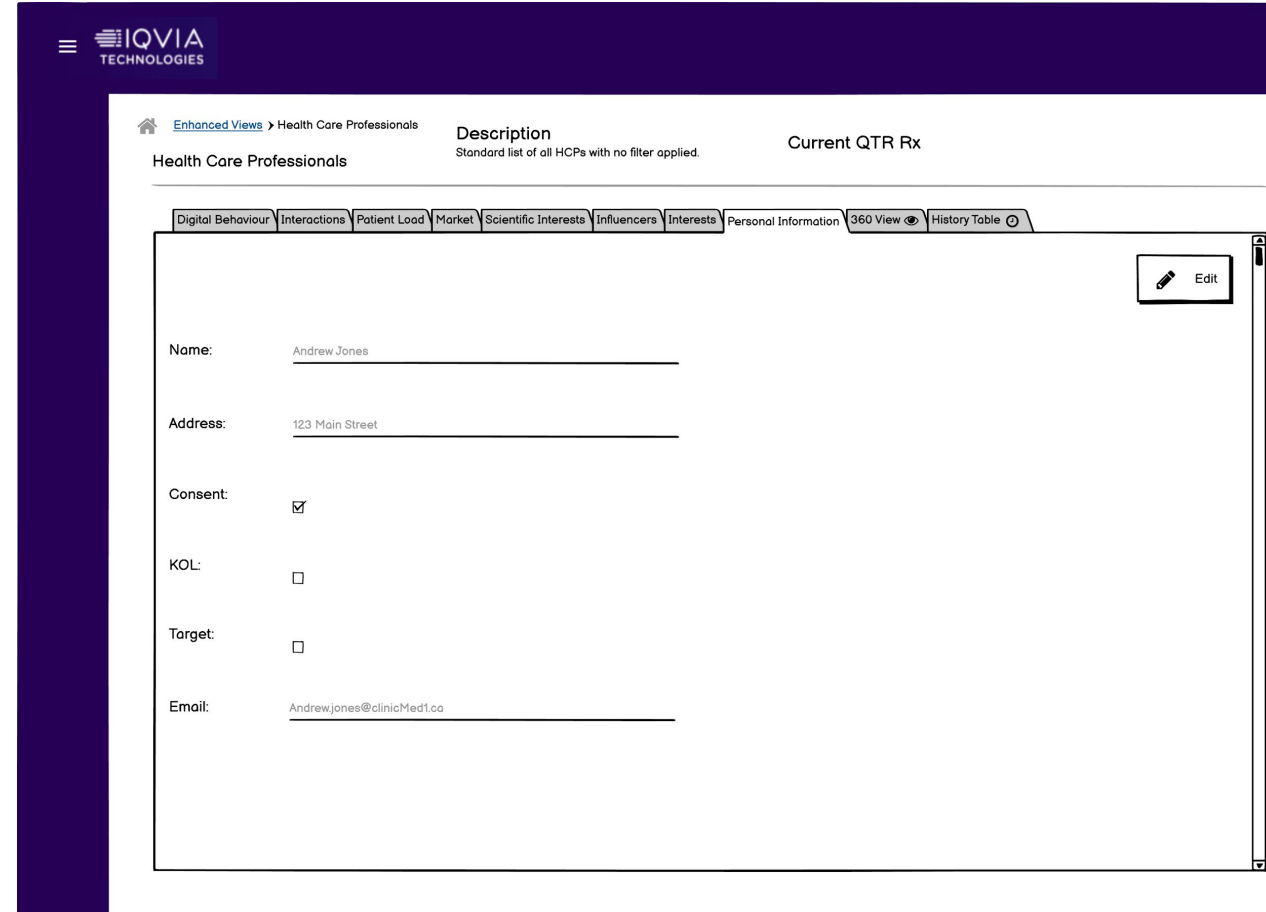
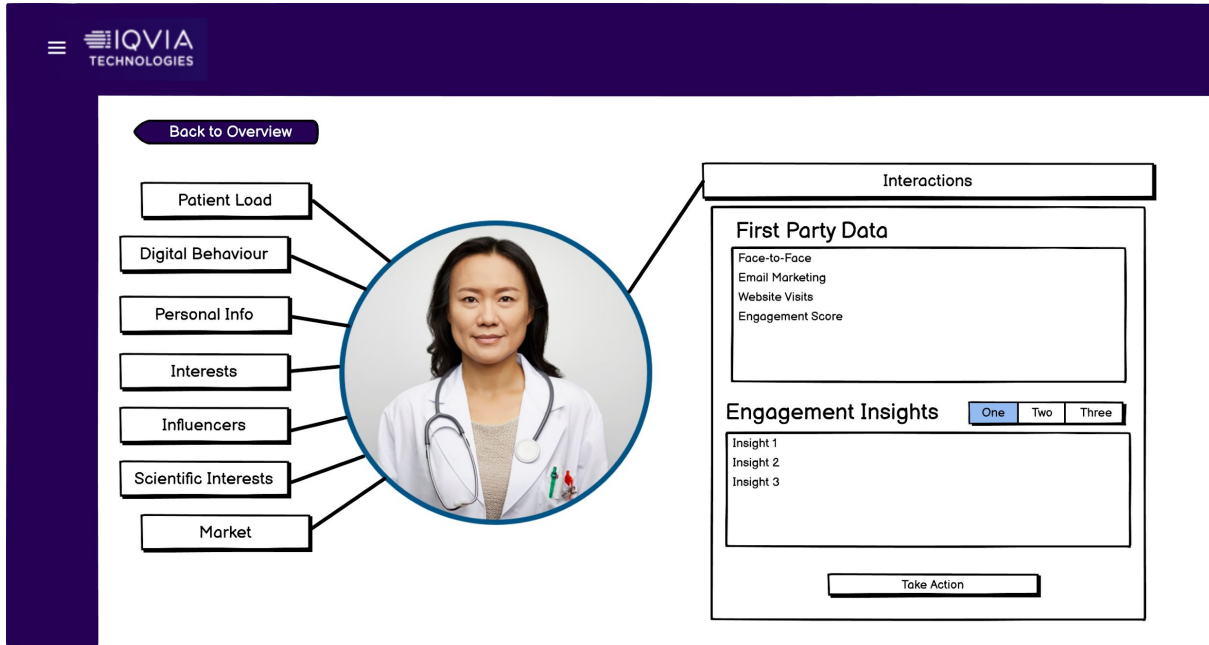
- The Analyst has chosen a record. The Detailed View for this View (Hub and Spoke, Tabs).
- The Analyst can now explore their Entity (get 360-degree view of the Entity) by interacting with the Nodes.



The screenshot displays the 'Health Care Professionals' record for Andrew Jones. The interface includes a navigation bar with tabs for Digital Behaviour, Interactions, Patient Load, Market, Scientific Interests, Influencers, Interests, Personal Information, 360 View, and History Table. The main content area shows fields for Name, Address, Consent, KOL, Target, and Email. The '360 View' tab is currently selected, and the 'Edit' button is visible in the top right corner.

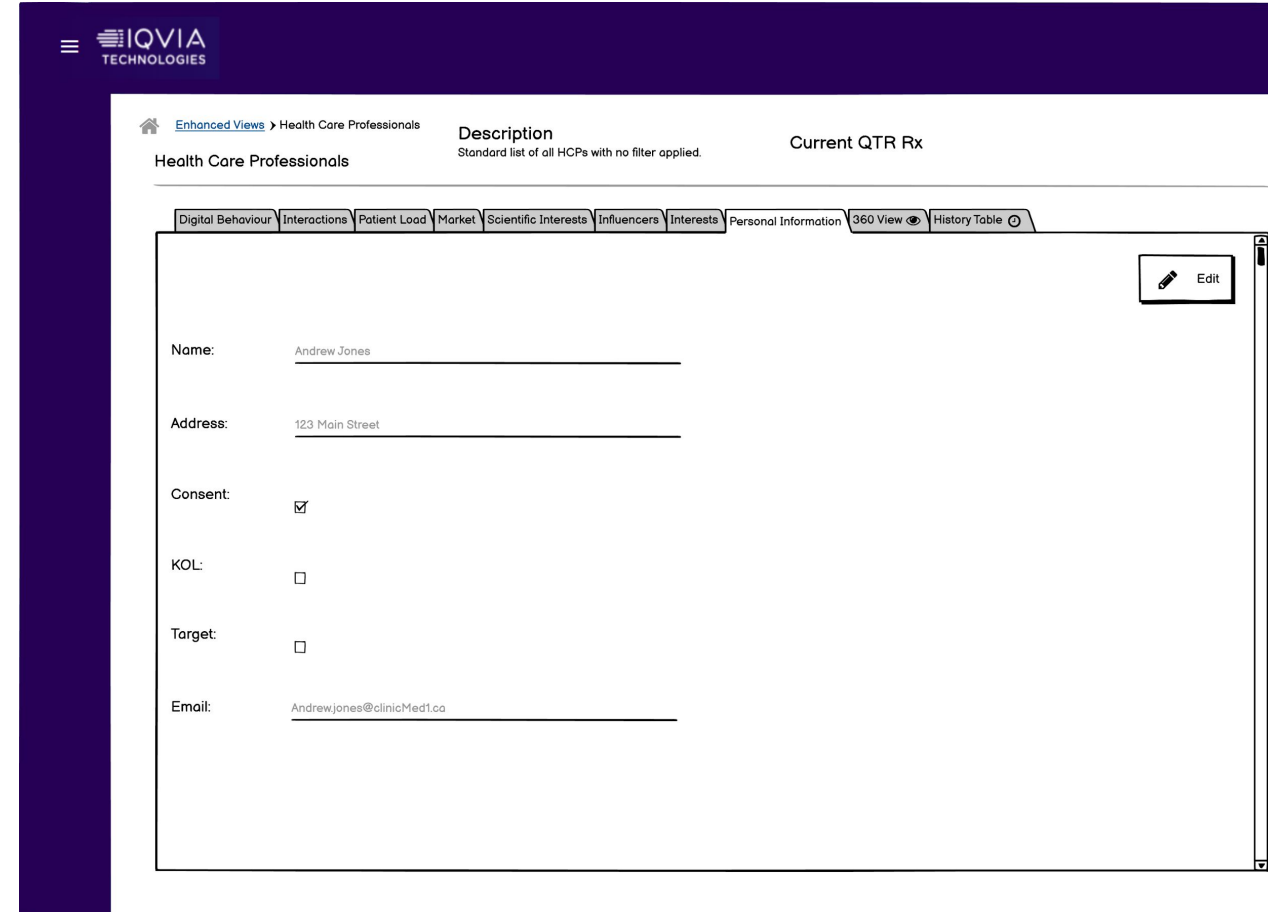
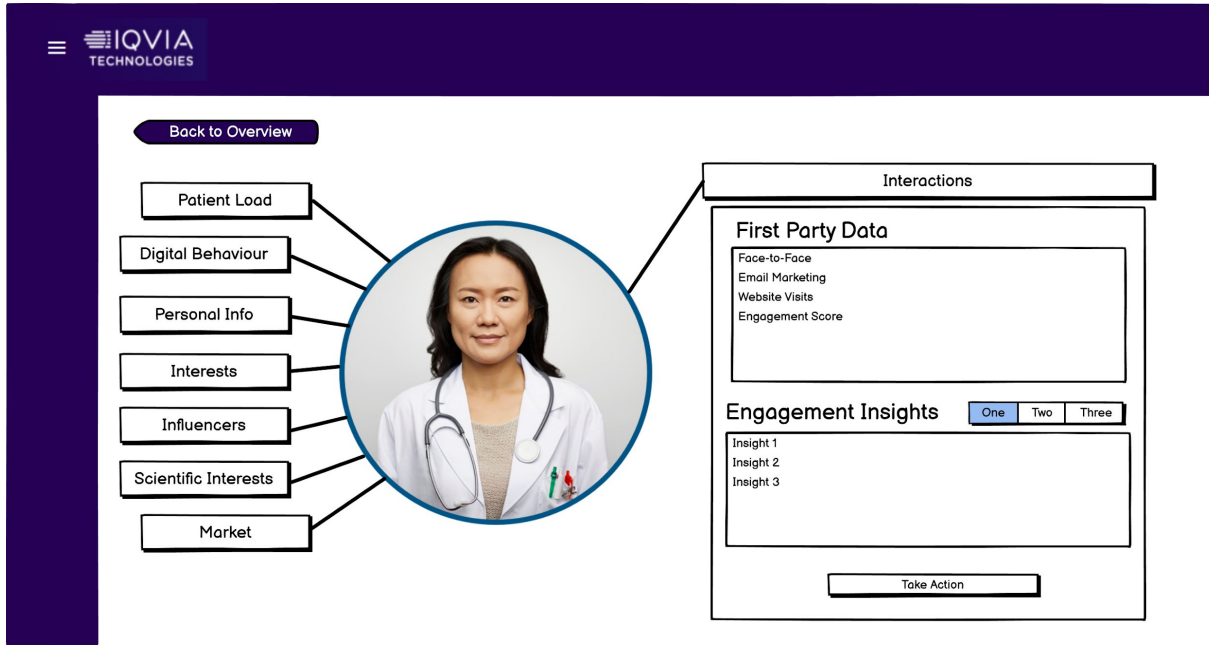
Analyst Flow

Enhanced View – Detailed View



Analyst Flow

Enhanced View – Detailed View



Data Steward Flow

Enhanced View – Detailed View

- The Data Steward's experience is the same as the Analyst, except when in Detailed View mode.
- The Data Steward has extra options in both the List and Analyze. In the List view, the Data Steward can view the List History, which is a table showing all changes to all the records in the View. They can also choose a particular record, and view only the history associated with that record.
- In the Analyze (Detailed View) they have the ability to toggle Edit mode, which allows for fields to be changed, saved, and committed back to the Database

The screenshot shows the IQVIA Technologies interface for Health Care Professionals. The top navigation bar includes the IQVIA logo and a menu icon. The main content area is titled "Health Care Professionals" and includes a search bar, a "Tag(s)" dropdown, and a "View List History" button. A table displays a list of records with columns for Record Name, Tag(s), and Current QTR Rx. Below the table, there is a "Page Size" section and a "History Table" tab. The "History Table" tab is active, showing a form for editing the record for Dr. Andrew Jones. The form includes fields for Name, Address, Consent, KOL, Target, and Email, along with an "Edit" button.

Health Care Professionals

Search for a Record

Tag(s) HCP View List History

Export List >

Record Name	Tag(s)	Current QTR Rx
Dr. Andrew Jones	High Prescriber	250
Dr. Michael Lynch	High Prescriber	300
Dr. Esther Stephens	High Prescriber	350
Dr. Avinob Roy	Low Prescriber	18
Dr. Renuka Balamurugan	Non Prescriber	0
Dr. Vince Kodikal	Non Prescriber	0

Page Size Items 1 - 6 of Page 1 of 1

Digital Behaviour Interactions Patient Load Market Scientific Interests Influencers Interests Personal Information 360 View History Table

Name: Andrew Jones

Address: 123 Main Street

Consent:

KOL:

Target:

Email: Andrew.jones@clinicMed1.ca

Edit