IQVIA GLOBAL PRODUCT MANAGEMENT

Enhanced Views (Entity360) Product Vision

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IQVIA TECHNOLOGIES

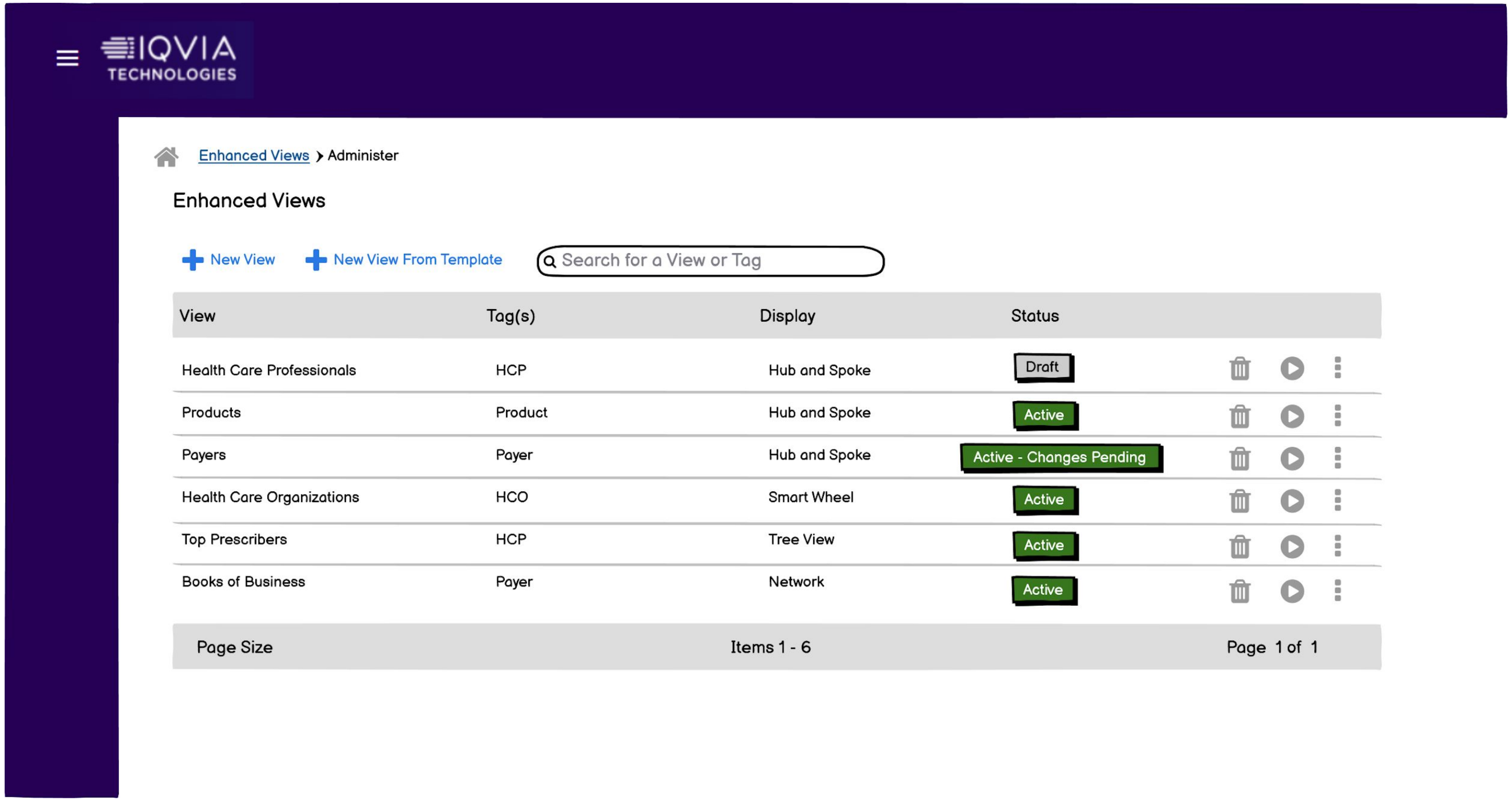
Product Vision

- 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

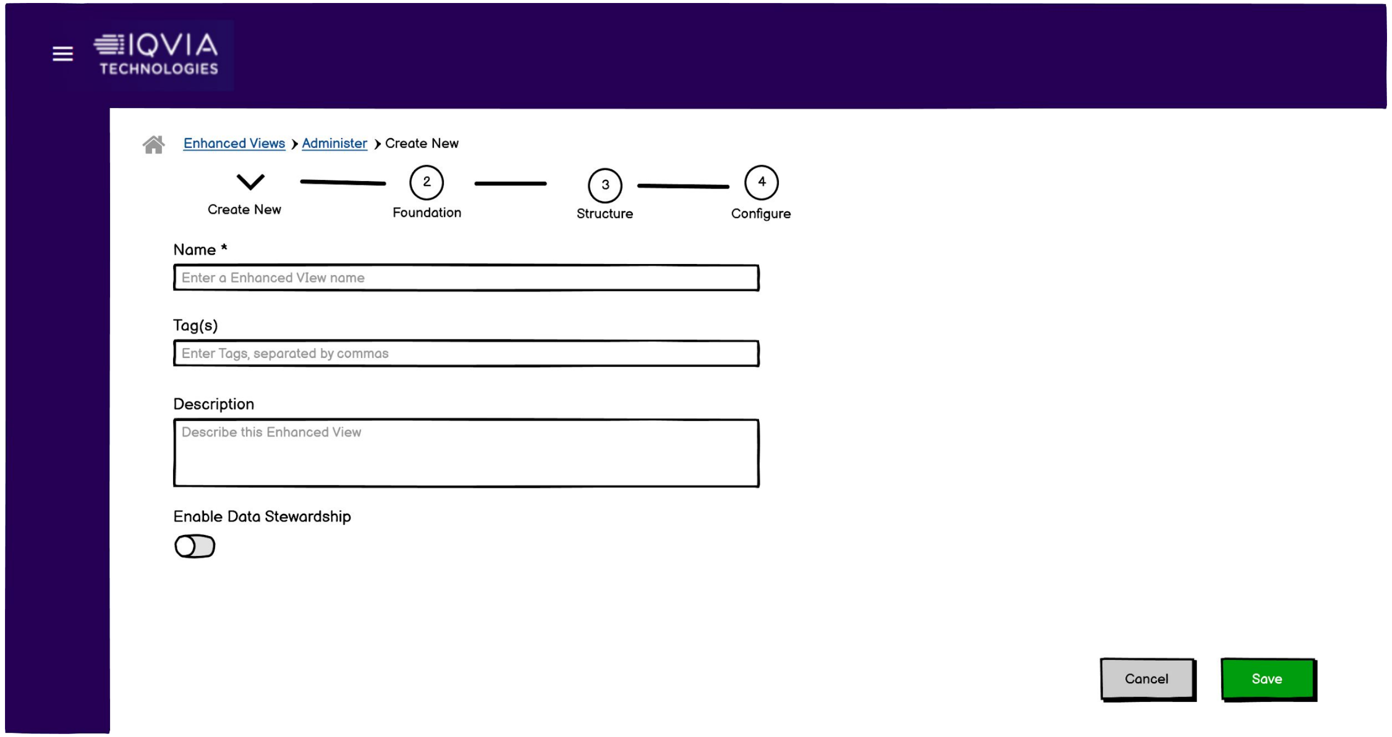
- Ability to Create New View, Create new View from Template, or Modify Existing Views using Ellipses/Delete
- Status shows Draft, Active and views with changes not yet published.



Administrator Flow

Creation of New View

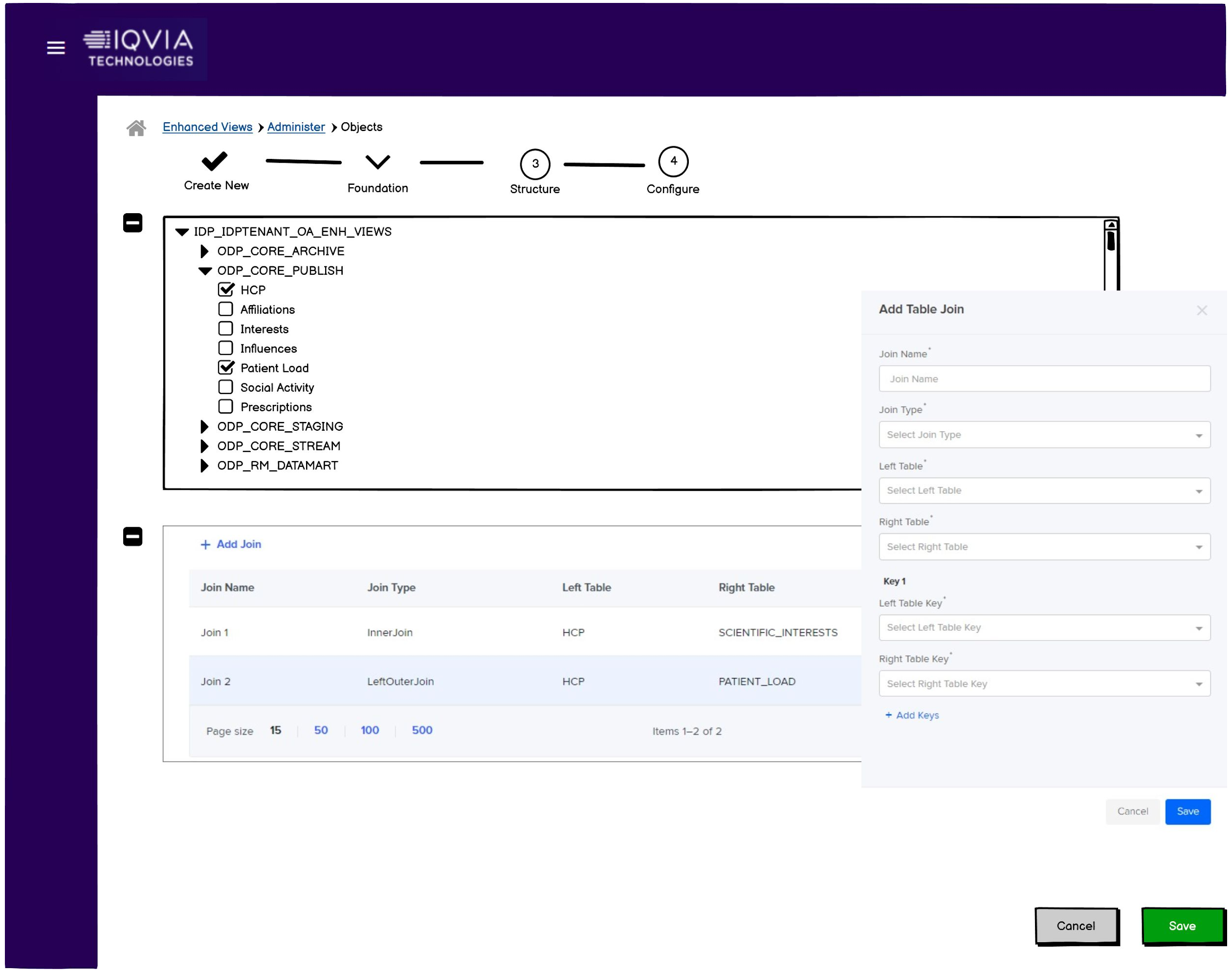
- Administrator must enter the Name of their View, and provide it with tags (could be the subject area).
- Can add a description to the View.
- A toggle allows for the View to be used in Data Steward flow.



Administrator Flow

Foundation

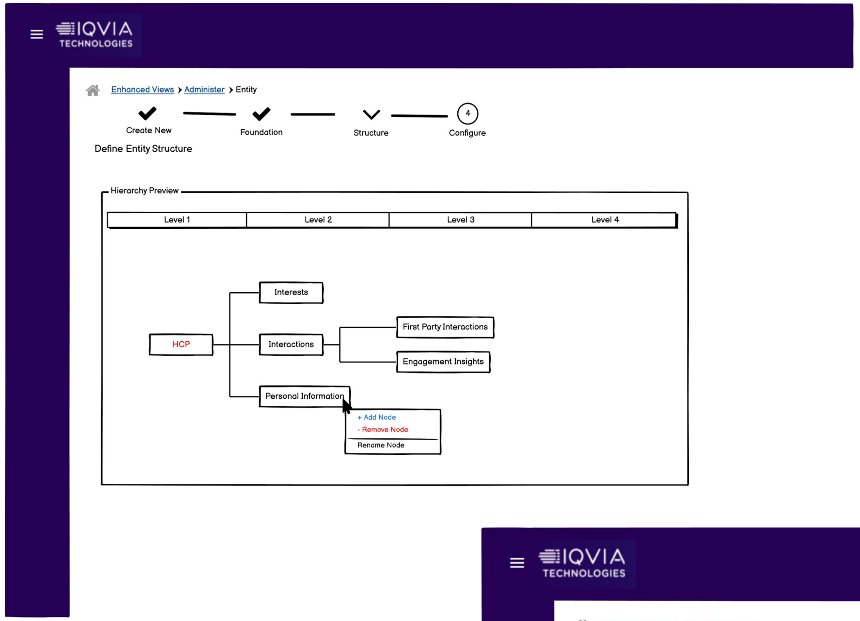
- Administrator chooses the Tables that will be used in the new View, in a tree hierarchy of Database, Schema, Table/Views
  - Assumption: the data in these tables are ready to be consumed as they are and require no additional transformation.
- A second section allows the administrator to configure joins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

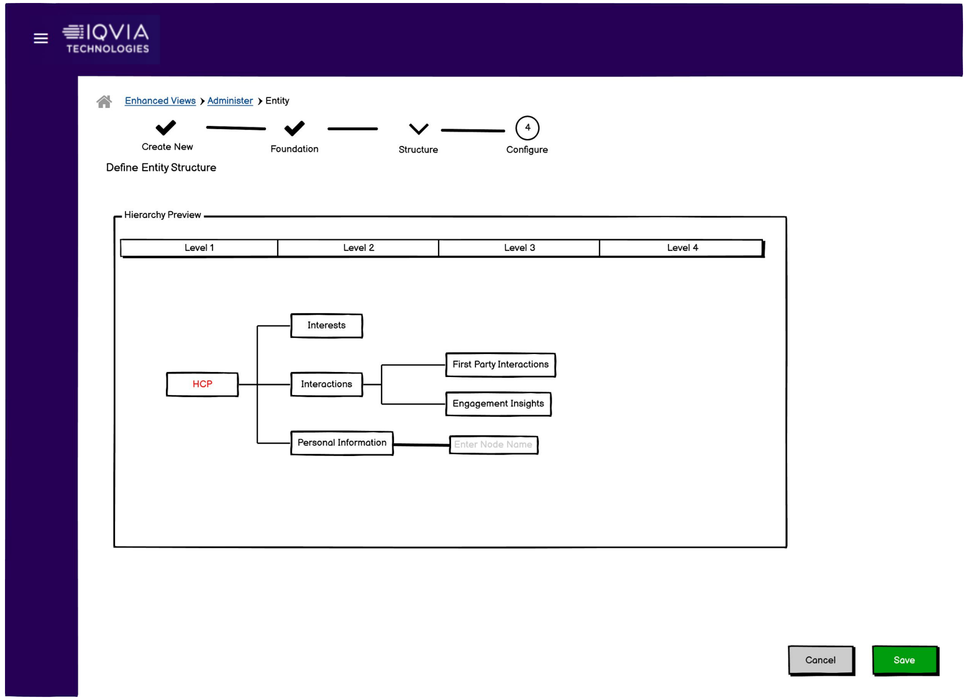


Administrator Flow

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.

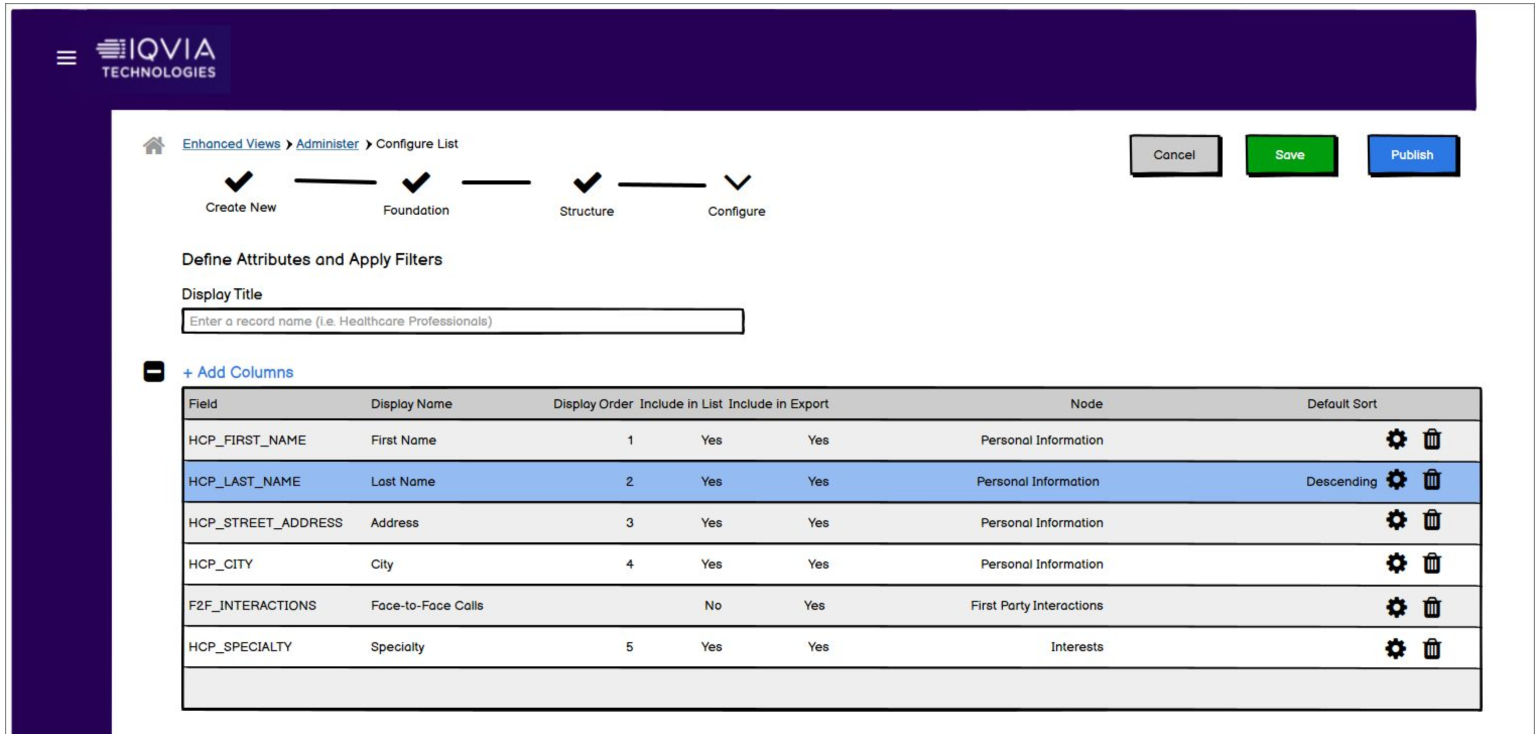




Administrator Flow

Configure – Columns

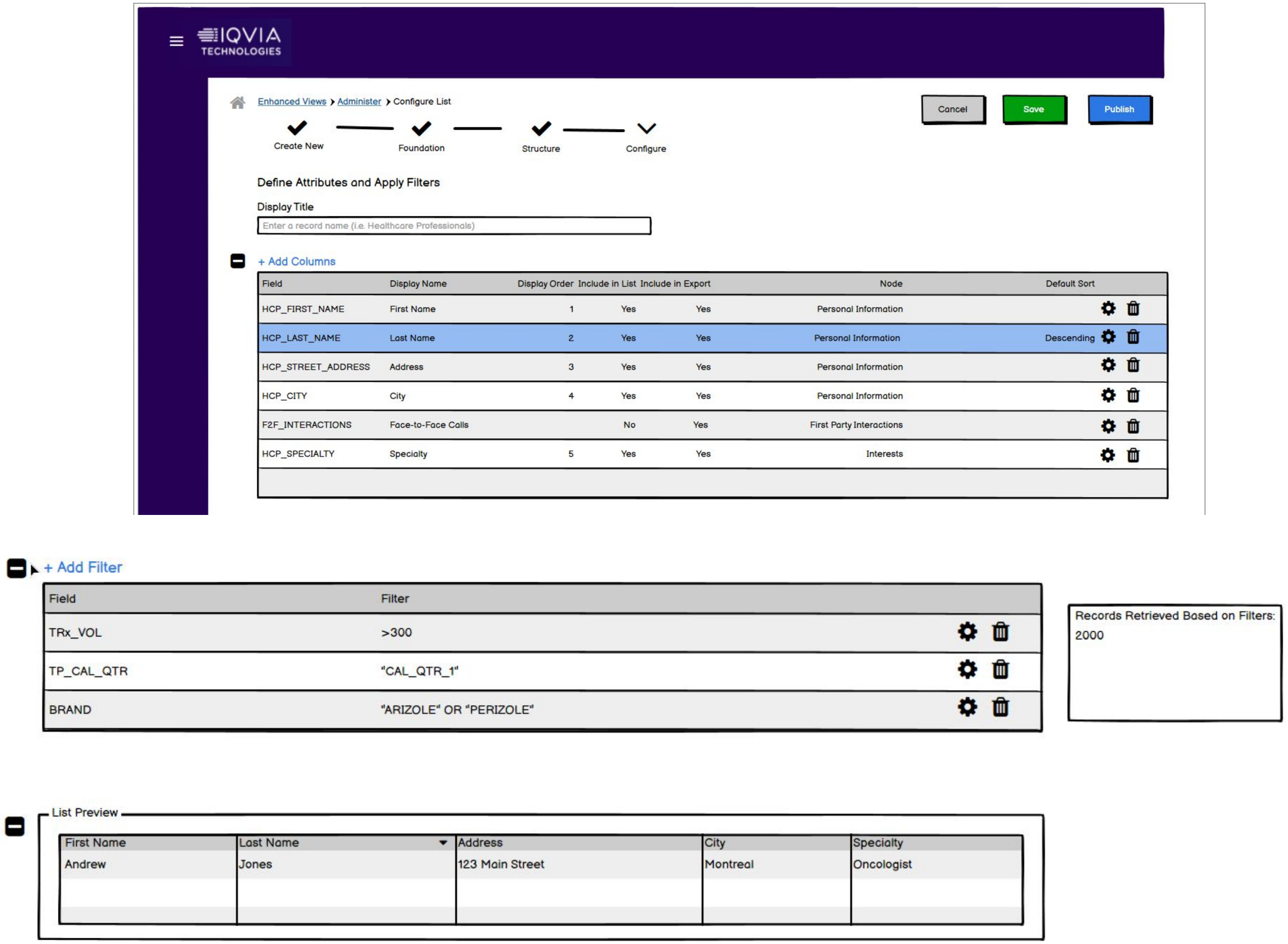
- The Administrator must now define the attributes of the nodes and finalize the List and Analyze view.
- The Admin can give records in their view a name (i.e. instead of calling Entities “Records” the system will refer to them as whatever is entered here).
- The admin must now configure columns. These 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



Administrator Flow

Configure – Filters and List Preview

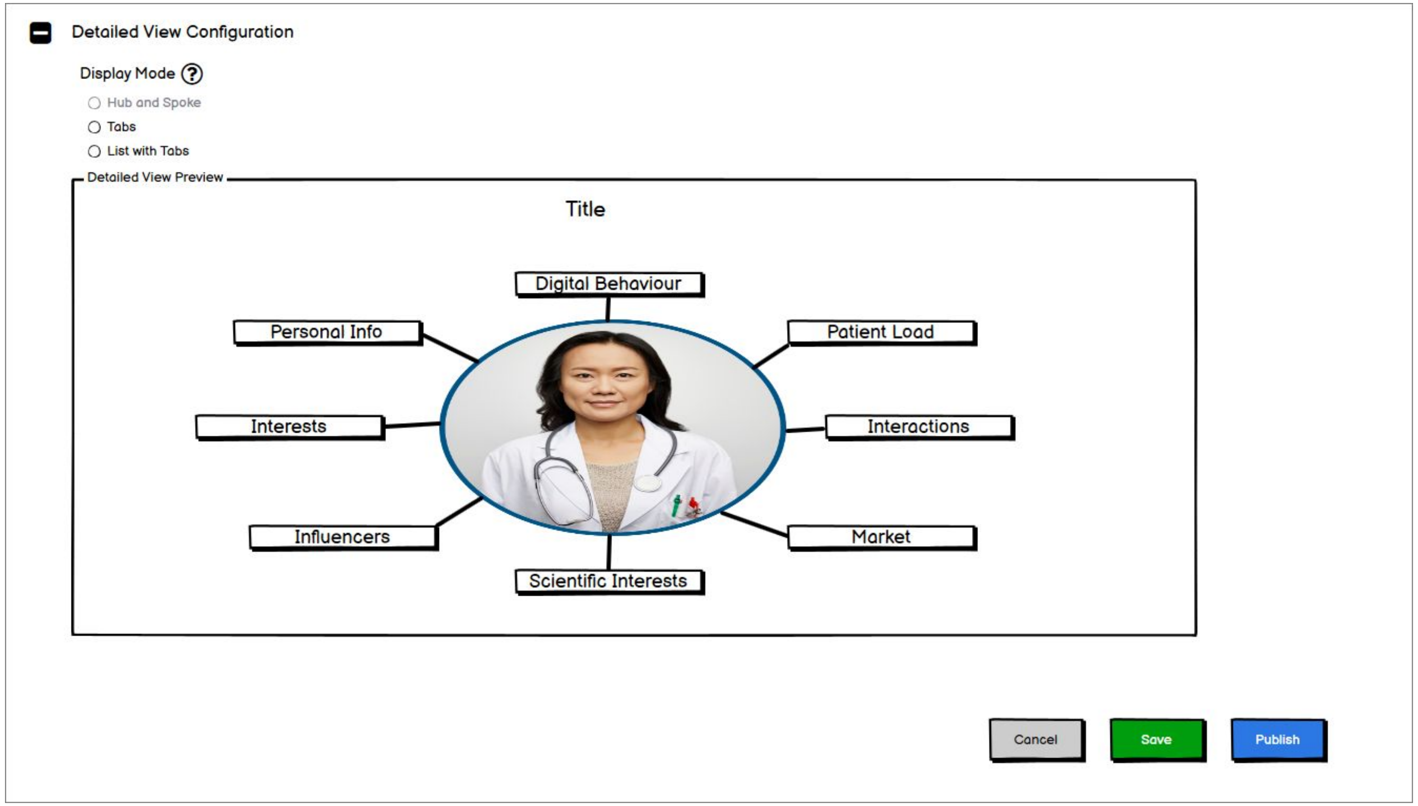
- The Administrator can add Filters to the View, to limit the number of Records that are pulled in. With no Filter, all records from the Column section are pulled in, using the joins configured in Foundation.
- When adding a Filter, the Admin must enter a simple statement for a chosen field, (we should 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.



Administrator Flow

Configure – Detailed View Configuration, Save/Publish

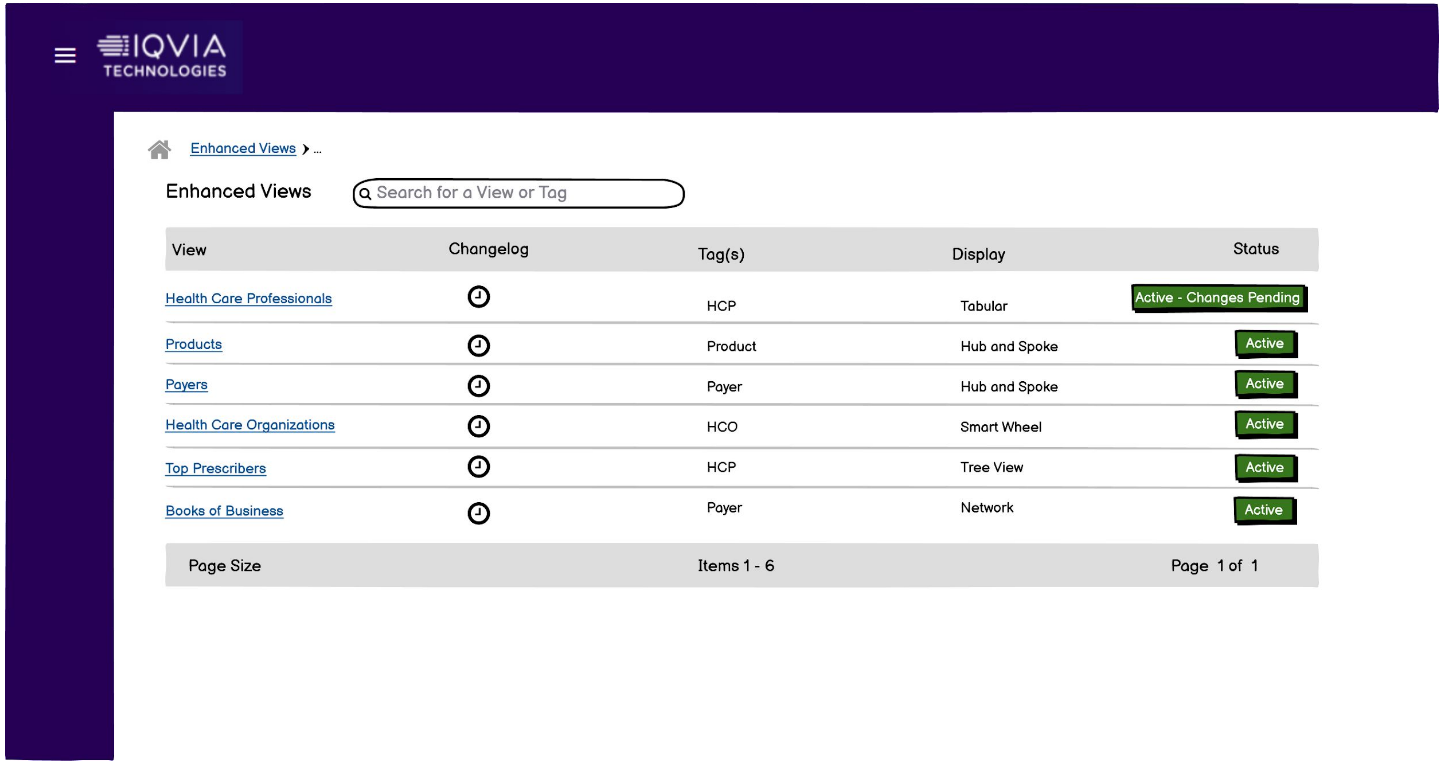
- The Administrator can choose how their Detailed View (**Analyze**) is displayed. The preview updates dynamically to show the chosen option. We should support 3 Modes, Hub and Spoke, Tabs and List with Tabs.
- Hub and Spoke should be disabled if the Administrator chose “Data Stewardship” when creating 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.



Analyst Flow

Enhanced View Selection

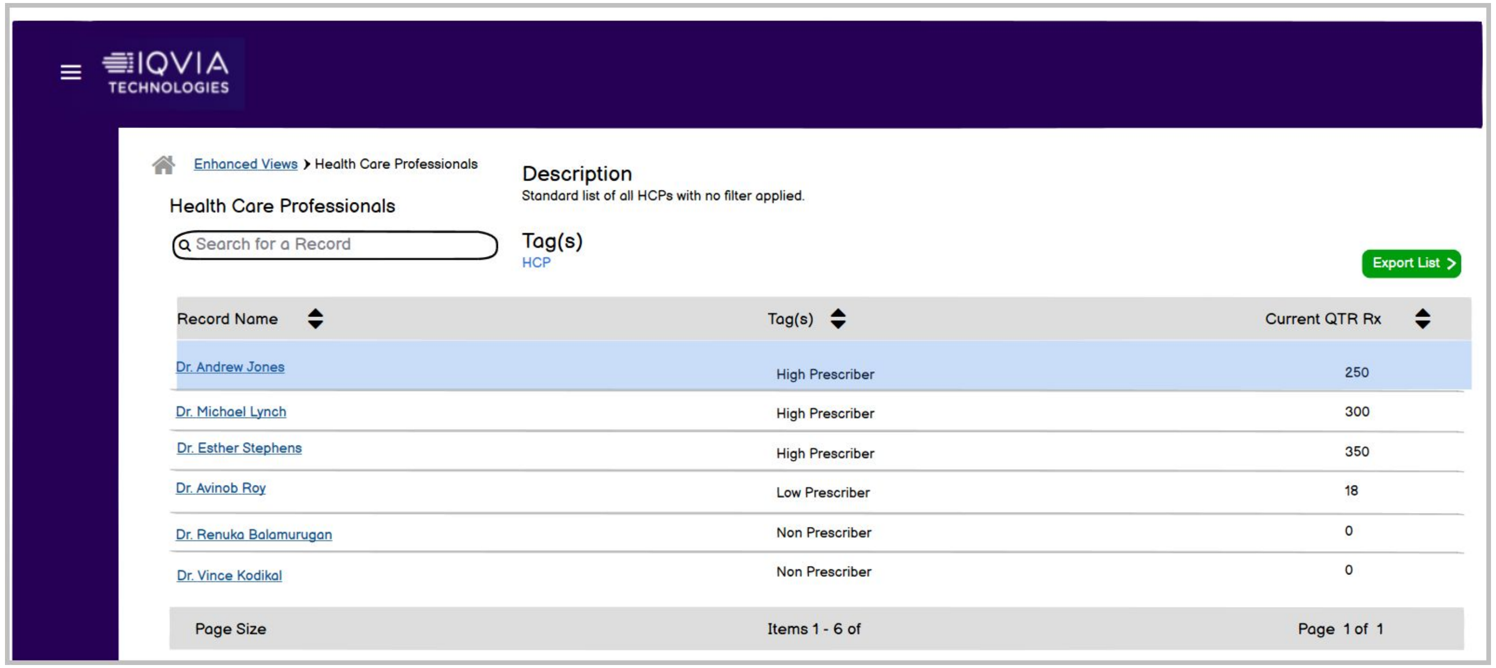
- Eventually, Administrators will create many Enhanced Views. The Analyst must choose what they want to work with from a list of Enhanced Views.
- Each view was given a name and tags by their creator. The Analyst can search for a View or Tag.
- A status indicator tells the Analyst that a view is either 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.



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**)

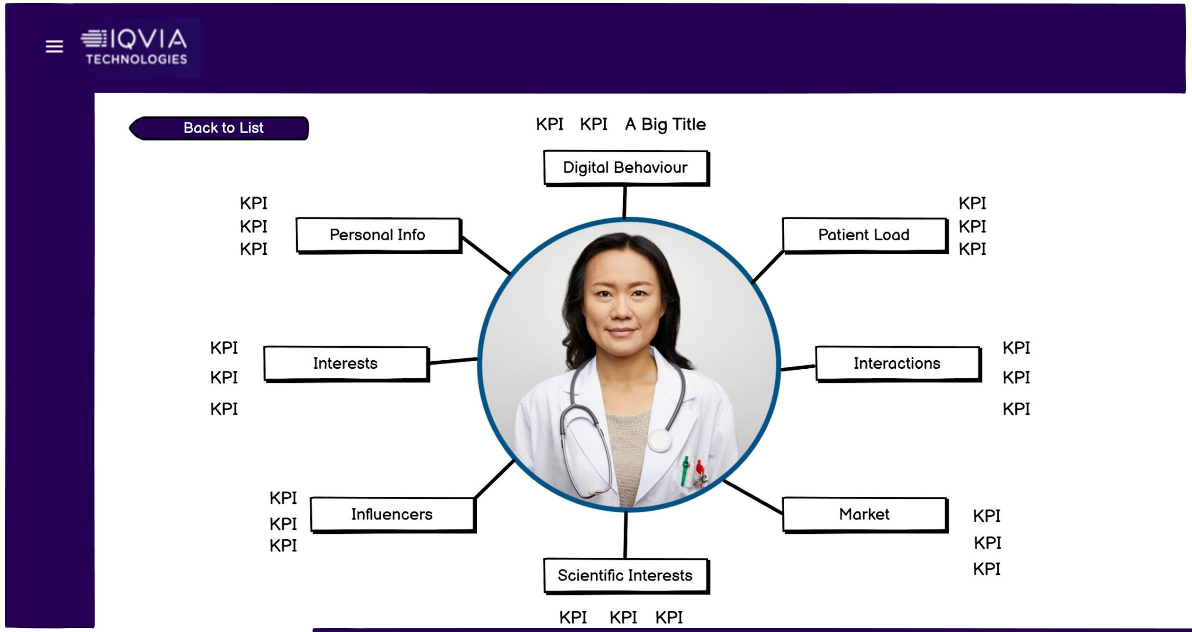


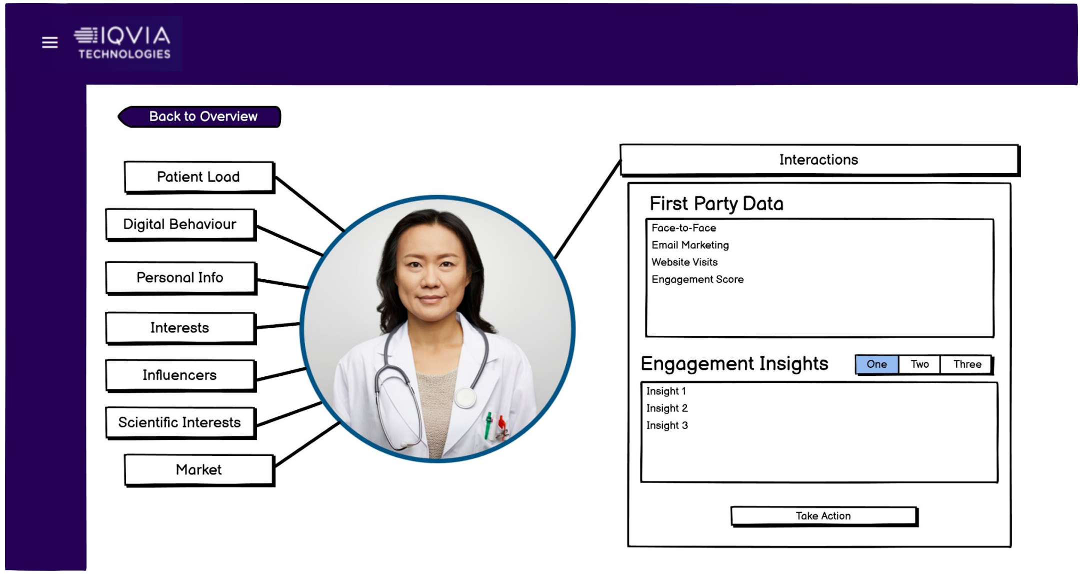
IQVIA TECHNOLOGIES

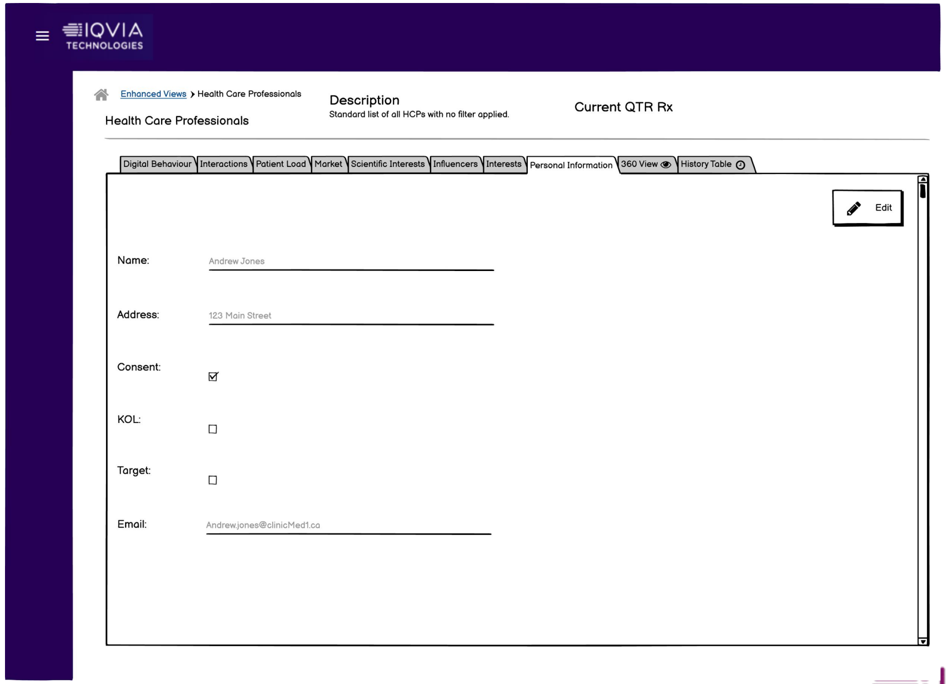
Analyst Flow

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.

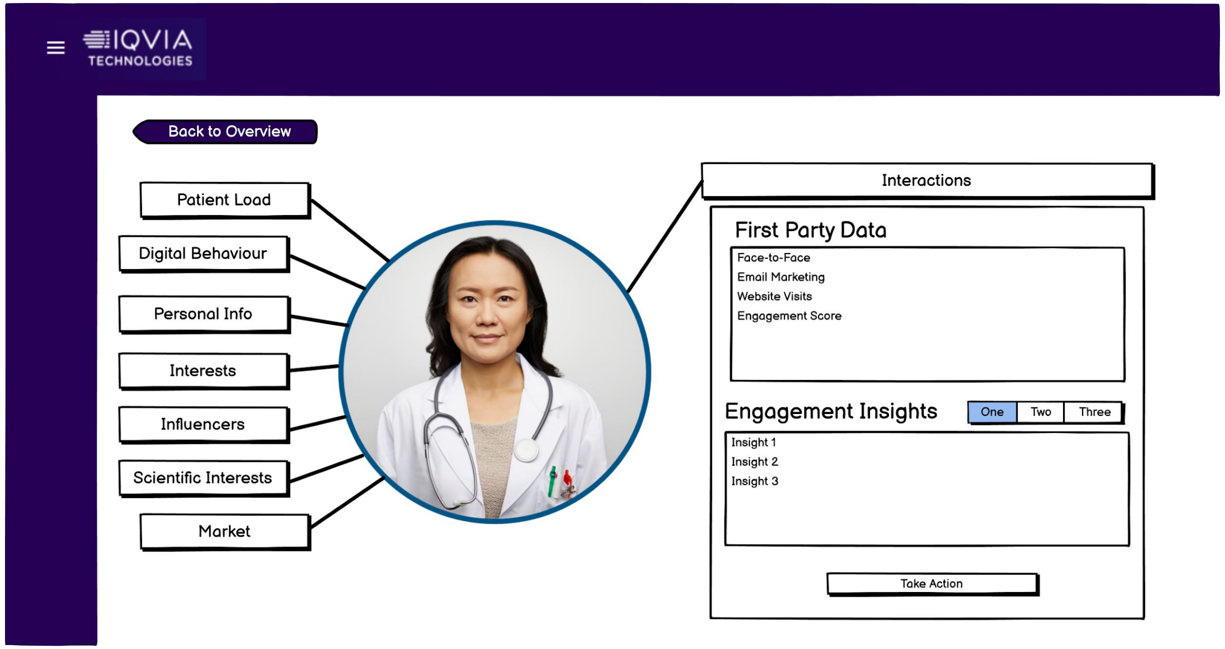


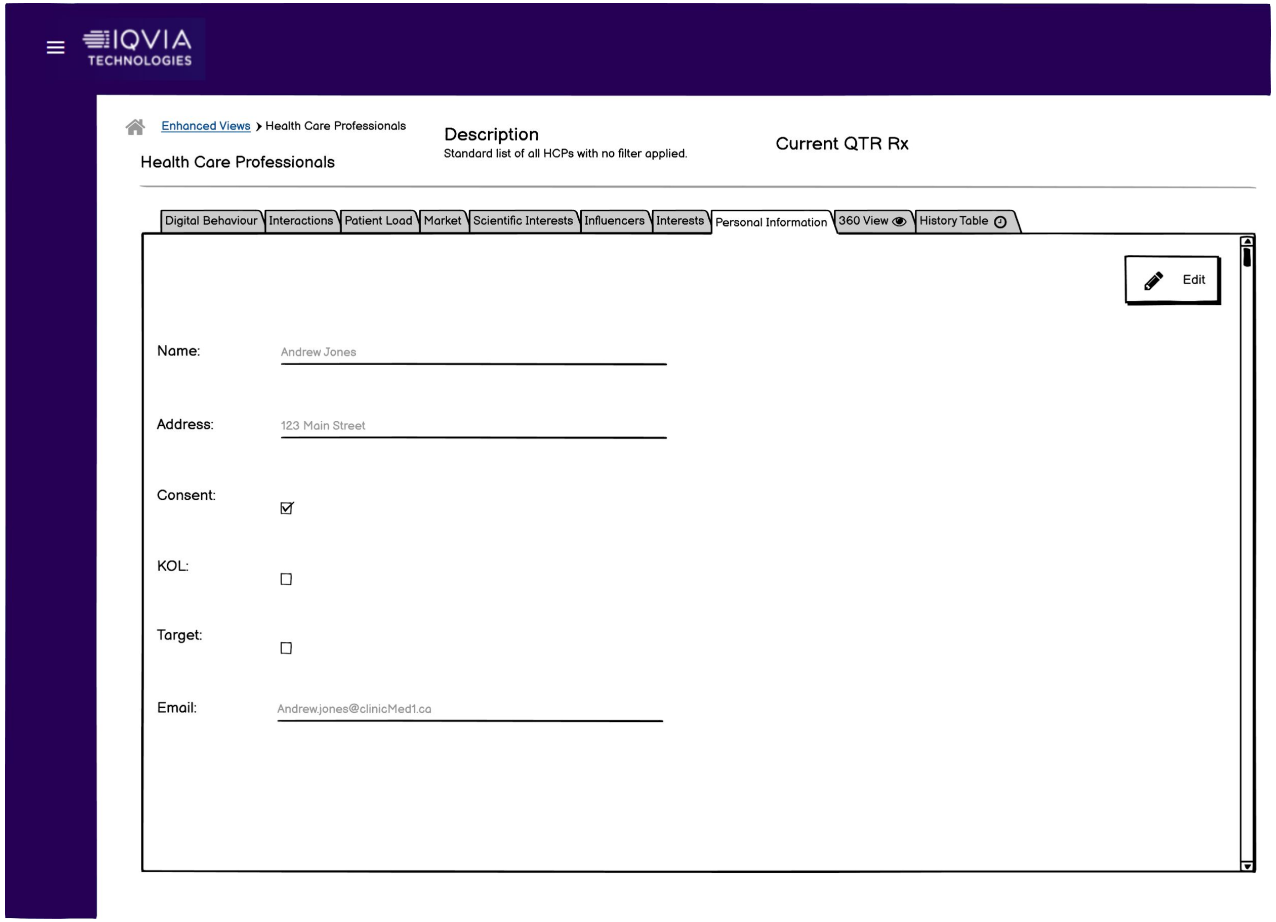




Analyst Flow

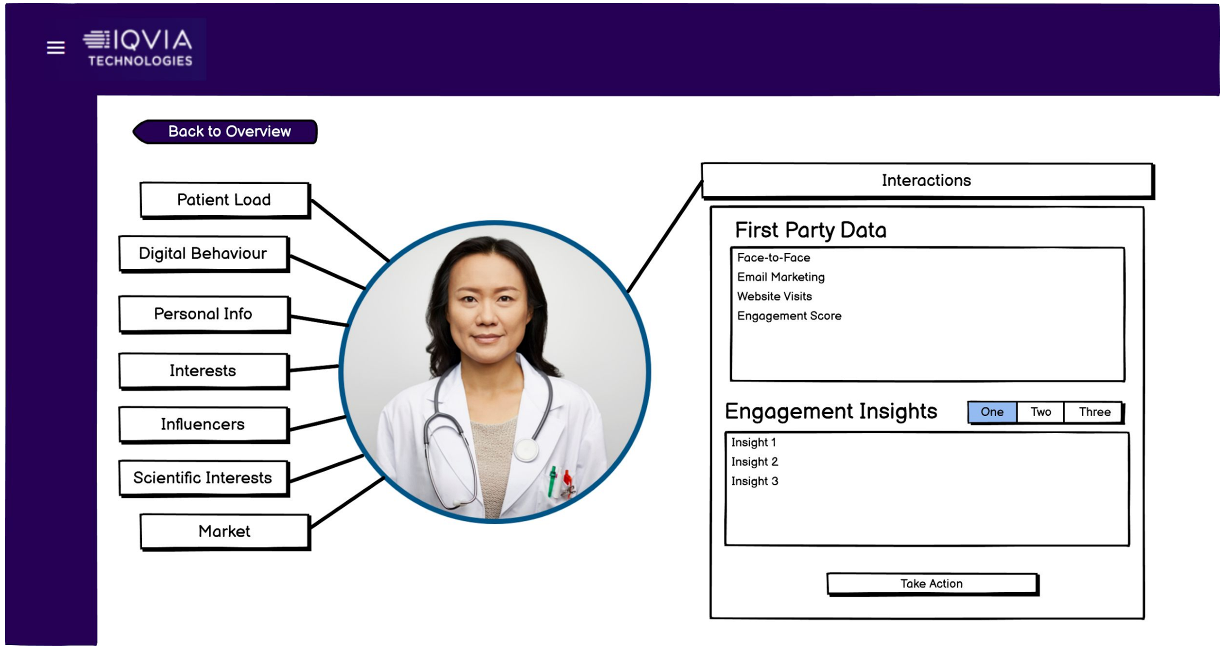
Enhanced View – Detailed View

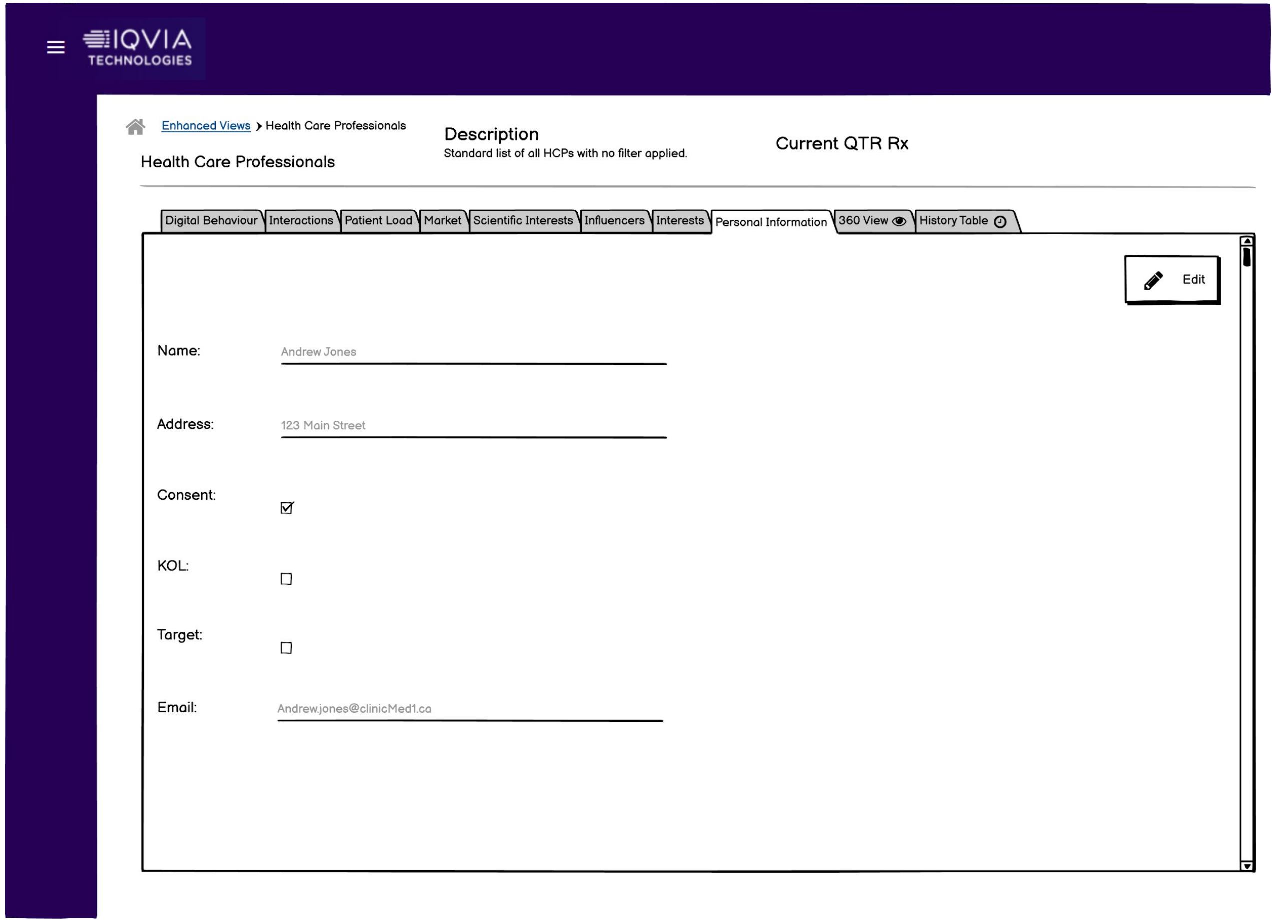




Analyst Flow

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