Siebel Clinical CTMS Tips and Tricks

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Introduction

- Many thanks to the OHSUG for this opportunity to present this tutorial.

- Many thanks to the OHSUG Planning and Committee after Planning for their infinite patience in receiving and expeditious review of this presentation

- Many thanks to everyone who participated in the development of presentation.

Siebel Clinical CTMS Tips and Tricks

Agenda

- Siebel Introduction
- General Siebel Navigation
- Other Useful Navigation
- Common Configurations
- Siebel Architecture

Siebel Clinical CTMS Interface

Interface

- Consistent in all parts of the application

- The different processes are carried out by creating new records, editing existing records (including status changes) and triggering automated workflows.

Siebel Clinical CTMS Interface

Siebel Clinical CTMS Interface

Home Page Components

- The Home Page for each responsibility can be customized.

- Elements can be customized by each user by clicking Edit Layout.

Siebel Clinical CTMS Interface

Siebel Clinical CTMS Interface

Screen Tabs and View Tabs

- Tabs vary by user responsibility

- Add New screen tab by Site Map (Global Icon)

- Most screens have one or more view tabs on the lower section(s).

Siebel Clinical CTMS Interface

Siebel Clinical CTMS Interface

Access

- Several screens and views have an access control mechanism to allow only certain data records to be displayed.

- The usual division is user > team > all. Some users may use all three, and some will be restricted.

Siebel Clinical CTMS Interface

Siebel Clinical CTMS Interface

Accounts

- An account is any entity that does business with your company.

- The Account record contains all the contact information, and can also contain other entities.

- An account can be the child of another account.

Siebel Clinical CTMS Interface

Siebel Clinical CTMS Interface

Contacts

- A contact is any person that does business with your company.

- Contacts can be affiliated to Accounts.

- Account affiliations can have start and end dates.

Contacts

General CTMS Navigation

- View Tabs
- Parent Detail Views
- Drill Downs
- Site Map

Other Useful Navigation

- Keyboard Shortcuts
  - CTRL + S (Save Record)
  - CTRL + B (Copy Record)
  - CTRL + U (Undo Record)
- Stepping off a record automatically saves the record
- Merge records
- Export to Excel
- Columns displayed
- User Preferences
  - Start up View
  - Change password

Other Useful Navigation

- Execute queries
- Save queries

Keyboard Shortcuts

Data Management Keyboard Shortcuts

Table 21 lists the keyboard shortcuts you can use when performing data management tasks.

Table 21. Data Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
New record	CTRL+ALT+N	CTRL+N	List, form
New record using Quick Fill template	CTRL+K		Form
New record using last used Quick Fill template	CTRL+J		Form
Apply Quick Fill template to record	CTRL+Q		Form
Copy record	CTRL+ALT+C	CTRL+B	Record
Save record	CTRL+SHIFT+S	CTRL+S	List, form
Delete record	CTRL+ALT+D	CTRL+D	Record
Undo record	CTRL+ALT+U -or- ESC	CTRL+U -or- ESC	Record
Select all	CTRL+ALT+A	CTRL+A	List
Invoke selection dialog box Open the calendar control Open the calculator control Open a drop-down list	CTRL+ALT+P	F2 or DOWN ARROW	Field

Keyboard Shortcuts

Record Navigation Keyboard Shortcuts

Table 22 lists the keyboard shortcuts you can use to navigate to records in the application.

Table 22. Record Navigation Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
Drill down into record	CTRL+SHIFT+SPACE (Cursor focus must be on the hyperlinked field.)		List
Go to previous record	CTRL+SHIFT+,	CTRL+UP ARROW	List, form
Go to next record	CTRL+SHIFT+.	CTRL+DOWN ARROW	List, form
Go to previous record set	CTRL+ALT+,	ALT+UP ARROW	List
Go to next record set	CTRL+ALT+.	ALT+DOWN ARROW	List
Go to first record	CTRL+ALT+F	ALT+F	List, form
Go to last record	CTRL+ALT+L	ALT+L	List, form

Query Management Keyboard Shortcuts

Table 23 lists the keyboard shortcuts you can use to work with queries.

Table 23. Query Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
New query	CTRL+ALT+Q	ALT+Q	List, form
Execute query	CTRL+ALT+ENTER	ALT+ENTER	List, form
Refine query	CTRL+ALT+R	ALT+R	List, form
Save query with different name	CTRL+ALT+S	ALT+S	List, form

Keyboard Shortcuts

General Navigation Keyboard Shortcuts

Table 24 lists the keyboard shortcuts you can use to navigate in the application.

Table 24. General Navigation Keyboard Shortcuts

Action	Basic Mode	Context
Go to Site Map	CTRL+SHIFT+A	Application
Go to application-level menu	CTRL+ALT+M	Application
Go back	ALT+LEFT ARROW	Application
Go forward	ALT+RIGHT ARROW	Application
Go to screen tabs	CTRL+SHIFT+T	Application
Go to view tabs	CTRL+ALT+T	Application
Open menu button pop-up on list or form	CTRL+SHIFT+M	List, form
Go to next list or form	CTRL+SHIFT+]	Application
Go to previous list or form	CTRL+SHIFT+[	Application
Open Search Center	CTRL+SHIFT+F	Application
Open iHelp	CTRL+SHIFT+E	Application
Open Tasks	CTRL+SHIFT+Y	Application

Identifying Views in CTMS

- In the current view click Help > About View
- About View will display:
  - Screen
  - View
  - Business Object
  - Applet
  - Business Components

http://stools/?SWECmd=ShowPopupFrames&SWEDIC=1&SWEU=/start.sw...

```
                    Screen: Accounts Screen
                      View: Account List View
         Business Object: Account
                   Applets: Applet[0]: SIS Account List Applet; Applet[1]: SIS Account Entry Applet;
Business Components: BusComp[0]: Account; BusComp[1]: Account;
```
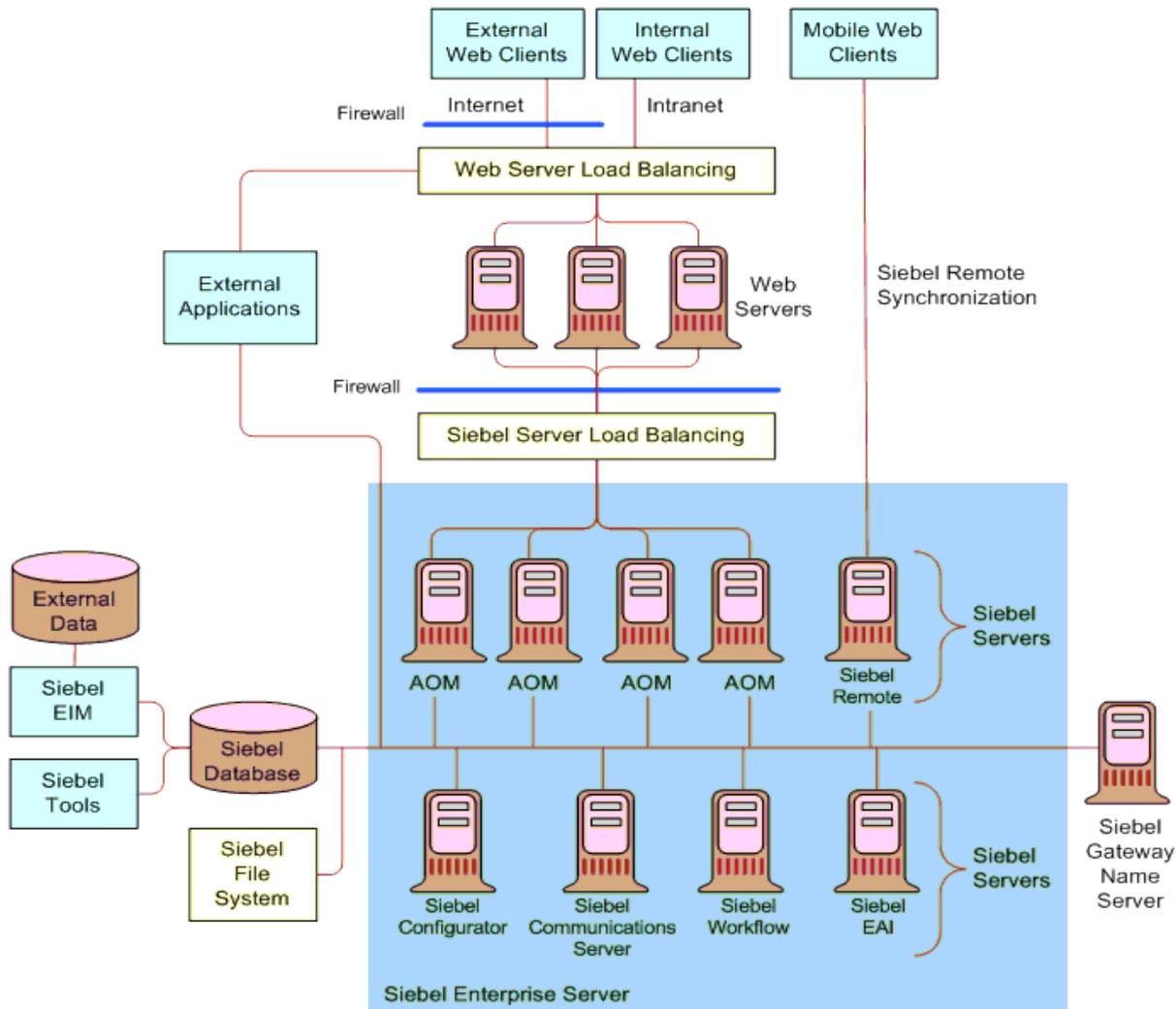OK

Common Configuration

- ## Alerts
  - ### Customizable Criteria (ie. Trip Reports, Documents, Financials)
  - ### Integrate with Email (SMTP)
- ## Calendar
- ## Configuration – Adapt Siebel Clinical to your business process

Siebel Architecture Overview

Using 10g Grid Control with Oracle Application Management Pack for Monitoring Siebel CRM

New Siebel-Specific Targets

Several new targets, as discussed in Table 1, have been added to Enterprise Manager in order to facilitate the management of Siebel CRM applications. These targets model the entities within a Siebel environment so that they can be managed within Enterprise Manager.

Most of these targets have direct one-to-one mapping with their counterparts in Siebel. Some are created to facilitate specific management capabilities within Enterprise Manager.

Excerpted from
Oracle® Application Management Pack for Siebel Getting Started Guide

Table 1 Siebel-Specific Targets

Enterprise Manager Target	Siebel Entity	Purpose
Siebel Enterprise	Siebel Enterprise	Representation of Siebel enterprise providing access to metrics and associated Siebel servers.
Siebel Server	Siebel Application Server	Representation of Siebel server providing access to related metrics and configuration information.
Siebel Component Group	Siebel Component Group	Representation of Siebel component group providing access to metrics and associated Siebel components.
Siebel Component	Siebel Component	Representation of Siebel component providing access to component metrics and configuration information.
Siebel Required Component Group	-	Representation of all the Siebel components providing mandatory functionality for the proper function of a Siebel server.
Siebel Functional Component Group	-	Representation of all the Siebel components providing functionality that may be used by multiple components (for example, Workflow).
Siebel Database Repository	Siebel Database	Representation of Siebel database providing access to Siebel business metrics.
Siebel Gateway Server	Siebel Gateway Server	Representation of Siebel gateway server.
Siebel Application Service (HI)	Employee Facing Siebel Applications (high interactivity)	Aggregated Service providing information about all the Siebel high interactivity applications.
Siebel Application Service (SI)	Customer Facing Siebel Applications (standard interactivity)	Aggregated Service, providing information about all the Siebel standard interactivity applications.

Types of Logging available in Siebel Clinical: Application Object Manager

Table 16. Common Event Types for Application Object Manager Diagnostics

Event Type Name	Event Type Alias	Log Level Setting	Description
Event to track the flow of a message	MessageFlow	4	Captures messages exchanged between the Application Object Manager (AOM) and Siebel Web Server Extension (SWSE).
Object Manager Session Information	ObjMgrSessionInfo	4	Captures User Session login, logout, and timeout information.
Event Context	EventContext	4	Captures applet and method executed, view names, and screen names that the user navigates to.
		5	Captures username and IP address when the session completes.
Object Manager Data Object Log	ObjMgrDataObjLog	5	Captures data manager object tracking; that is, the creation, use, and deletion of database connections, search specifications, sort specifications, and cursors.
Object Manager Log	ObjMgrLog	5	Captures general AOM events: load license, open SRF, errors, and so on.
Object Manager Business Component Log	ObjMgrBusCompLog	4	Captures Business Component-related events: create and delete.
Object Manager Business Service Log	ObjMgrBusServiceLog	4	Captures Business Service-related events: create, delete, methods invoked, and so on.
Main Thread Events	MainThread	4	Captures task counter, task creates, and task exits (in main Multithreaded Server log).

Types of Logging available in Siebel Clinical: Application Object Manager (2)

- **Excerpted from Siebel Systems Monitoring and Diagnostics Guide, previous, current, next slides**

Task Related Events	TaskEvents	4	Captures task creation, context, session timeout, and close info.
SQL Parse and Execute	SQLParseAndExecute	4	Captures the SQL insert, update, and delete statements processed by the database connector. It includes the SQL statement and bind variables. The content is similar to the ObjMgrSqlLog event; however, the select statement is not captured by the SQLParseAndExecute event.
Object Manager SQL Log	ObjMgrSqlLog	4	Captures the SQL select, insert, update, and delete statements processed by the AOM data object layer. Includes the SQL statement and bind variables. It also captures the prepare, execute, and fetch time for the SQL cursor.
		5	Captures internal and customer-defined search and sort specifications, the joins processed for queries, as well as a call stack of the operation performed. Setting this event to log level 5 incurs a significant performance impact because a callstack is generated. Only set this event to log level 5 in consultation with Siebel Technical Support.
SQL Profiling	SQLProfiling	4	Captures SQL Profiling information. Helps aid in the diagnosis of a poorly performing component.
SQL Summary	SQLSummary	4	Captures SQL prepare, fetch, and execute times. Provides detailed information regarding the execution of a SQL statement.
SQL Slow Query	SQLSlowQuery	4	Captures SQL Performance— lists ten slowest performing queries.
Security Adapter Log	SecAdptLog	5	Captures security adaptor tracing information to the AOM log file.
Security Manager Log	SecMgrLog	5	Captures security manager tracing information to the AOM log file.

Types of Logging available in Siebel Clinical

- Log Levels are 1=Most Severe to 6=Informational messages

Components	Parameters	Events

Menu ▼ | Query | Enable | Disable | 1 - 1 of 1

Component	Alias	Component Group	Enable State
› Server Request Broker	SRBroker	System	✓

Each Component in the Siebel Architecture can have several Event Types with different Logging Levels

Events	Parameters

Menu ▼ | Query | 8 - 17 of 76+

Component Alias	Event Type	Log Level	Description
SRBroker	Error Condition	1	Triggered upon reaching an unhandled error or exception
SRBroker	General Events	1	General event point logging
SRBroker	Param Encryption	1	Param encryption values in the scr layer
› SRBroker	Performance Event	2	Event for Performance Measurements
SRBroker	SRM record Synchronize	1	Triggered during the SRM synchronize from gateway to the database.
SRBroker	Component Tracing	1	A trace condition was met (used from LogTrace only)
SRBroker	Task Configuration	1	Configuration of Server Task
SRBroker	Task Configuration at exit	1	Configuration of Server Task at exit

Troubleshooting CTMS Issues

- Errors resulting from configuration problems in the Repository.

- SQL Execution errors and tracing on the Dedicated Client.

- SQL Execution errors and tracing on the server for Thin Client.

- Running the Siebel Client in debug mode

Configuration Troubleshooting

- Validate configuration of Repository Objects before compiling SRF:

- In Siebel Tools, select object(s) of any type, right click, Validate.

- Set output log filename and path.

- Click Options and choose rules to enforce, or "Enforce All".

SQL Query Troubleshooting – Dedicated/Remote Client

Configuration problems with Repository and/or Database objects can cause SQL errors in the application:

- Edit Shortcut Properties for Siebel Clinical.

- Use the /s command line switch followed by a path and filename for output to specify a SQL trace file which will help identify the query that is causing a problem.

- When an error occurs, open the output file and the last query logged should be the culprit. By analyzing the tables involved, in the context of the screen/view/business object where the error occurred, you should be able to identify the problem Business Component.

SQL Query Troubleshooting – Dedicated/Remote Client

- Sometimes running the SQL statement with a third party SQL client (like Toad) can help identify a problem if it is with the physical DB object layer.
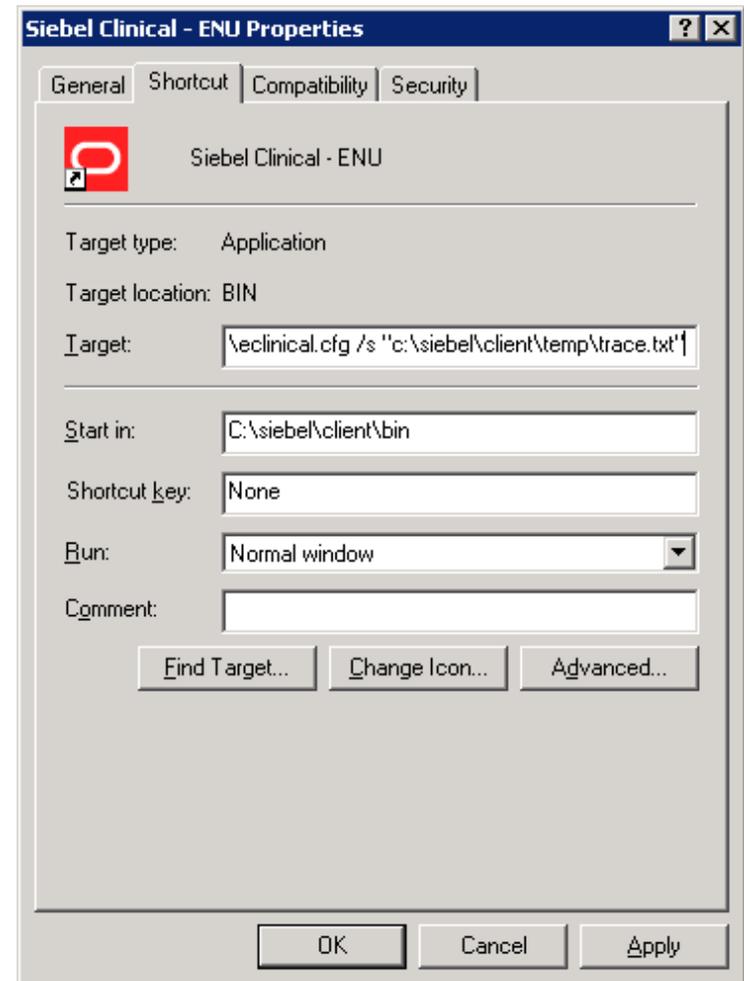
SQL Query Troubleshooting: Server Component (Thin/Web Client)

To trace the SQL execution and event handling of server components, you need to set certain flags within the Component's parameters:

- Navigate to the Administration – Server Configuration screen, Server Component Parameters view, and query for the eClinical Object Manager component on the correct server(s).

- Click the "Hidden" button on the Component Parameters applet and set the SQL Trace Flags parameter to 7.

SQL Query Troubleshooting: Server Component (Thin/Web Client)

- The log file for the component task, including the trace of executed SQL, can be found at the following path:

- /<siebelroot>/siebsrvr/enterprises/<enterprisename>/<siebelservername>/log

- (Don't forget to turn the trace flags back to 0 when you are finished as tracing produces large output files.)

Set SQL Trace on Siebel Thin/Web Client

Running the Siebel Client in Debug Mode

- For the purposes of debugging Siebel eScript or Siebel VB script, you can run a client session in debug mode and set breakpoints in the script(s).

- In Siebel Tools, select View, Options, and edit the information in the Debug tab. Make sure to include the /h switch in the command line "Arguments" (you may also include /s and specify a SQL trace output file).

Siebel Tools => View => Options => Debug Tab

Running the Siebel Client in Debug Mode (2)

- To set a breakpoint, right click the left margin of the line and select Toggle Breakpoint.

- Start the client in debug mode by pressing F5, or select Debug, Start, from the menubar.

- When the breakpoint is reached the client will halt and Siebel Tools will now allow you to step through the script with familiar commands like F8, and resume with F5.

Conclusion

- Ability to understand basic keyboard shortcuts and CTMS customization can benefit your organization in:
  - Business efficiency
  - User performance
  - Reduce time and costs

Biographies

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Question and Answers

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