Agnitio CLM- iPlanner 1.7 User Manual

Table of content

1 Document Contents and purpose

This document functions as the user manual for the normal day-to-day usage of the Agnitio iPlanner 1.7 for end-users. It should not be used as a reference-material for technical purposes.

2 Document History

2.1 Signatures

Role	Name	Title	Date & Signature
Author	Benjamin Post	Software Product manager	
Reviewer	Elizabeth Würtz	Technical Project Manager	
Reviewer	Mikael Jensen	IT and Tech lead	

2.2 Revision History

Author	Overview of changes	Date	Version	Changes tracked
Benjamin Post	Initial version	Oct 20th 2010	1.0	
Benjamin Post	Version Update (1.2)	Apr 27th 2011	2.0	
Benjamin Post	Version Update (1.6)	June 21st 2011	3.0	
Benjamin Post	Corrections and revision	July 6th 2011	3.1	
Benjamin Post	Version Update (1.7)	Sep 21st 2011	3.2	

2.3 Document Review

This document is updated whenever relevant changes to the Agnitio software suite take effect. Yearly document reviews are required (by Agnitio) in order to secure accuracy. The yearly document review is required to take place within a year from last version (i.e. 1.0, 2.0 etc.). All versions are required to be signed by the document author, pier reviewer and system owner.

2.4 Reference Documents

Document Name	File Location

2.5 List of abbreviations

Abbreviation	Comment
CLM	Closed-Loop Marketing

2.6 Disclaimer

Agnitio takes no responsibility for software not properly installed or with incorrect configuration (please refer to the Agnito CLM – License Agreement)

Agnitio takes no responsibility for un-authorized use of Agnitio software.

3 Where can I find this manual?

This manual is available inside the Agnitio iPlanner itself.
To access it, go to the "Home" menu:

And tap the "Help" button in the top left corner:

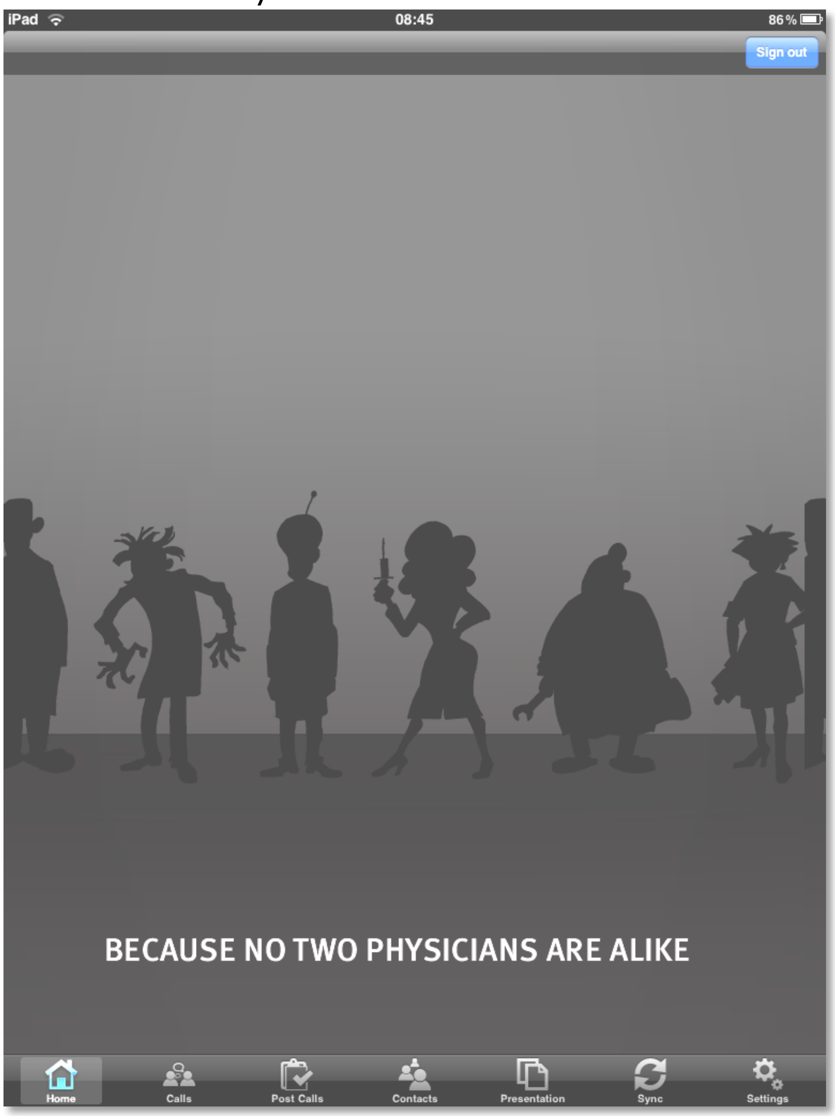
In the "Help" window, you can access the manual by tapping "iPlanner User Manual":

4 Starting out

Log in using the username and password provided. If requested to do so, please read and accept the License Agreement.

Note that there is a setting that allows the iPlanner to remember your username and password, so you do not need to re-enter it each time you access the application. However, we encourage you to check with your local IT-department if using this setting is allowed by your company's IT-security policies

You will now find yourself on the iPlanner Home Screen:



5 The basic navigation

The Agnitio iPlanner has been built to be as flexible as possible, allowing the numerous ways to achieve the same results. This is to ensure that a user always has access to the task that he is working towards, with as few clicks as possible. You may therefore discover that there are additional paths through the application than what is covered in this guide.

The Agnitio iPlanner is managed and controlled via a toolbar, consisting of a set of 7 buttons at the bottom of the screen. Their functions will be described in greater detail later on in this guide.

- **Home** Takes you to the home-page and landing-page of the application
- **Calls** is the menu-point where you manage upcoming calls and create new ones
- **Post Calls** manages the calls that have been performed on your iPad, allowing you to edit and add details, and submit the calls for synchronization with the servers
- **Contacts** gives you access to the list of customers that have been assigned to you
- **Presentations** contains an overview of the various published presentations you have access to, and allows you to synchronise individual presentations and preview presentations
- **Sync** manages the upload and download of call-data and new or updated presentations
- **Settings** gives you access to special settings for advanced users

Each icon on the toolbar will also display indicators if there are any actions or activities that the user should be aware of.

For instance, a "Post Call" menu-item looking like this:

-Would indicate that one call has taken place, and is awaiting any final additions and editing, before being ready to synchronize to the servers

-And a "Sync" menu-item looking like this:

Would indicate that 2 elements are awaiting synchronization

6 "Calls" explained

The logic in the iPlanner concerns itself with managing "Calls". Calls are the various types of visits performed, where the iPlanner is used, and their life-cycle in the iPlanner is managed through a sequence of statuses, from a freshly created "New Call", to a completed call, with participants, comments and presentations attached, ready to be sent to the servers.

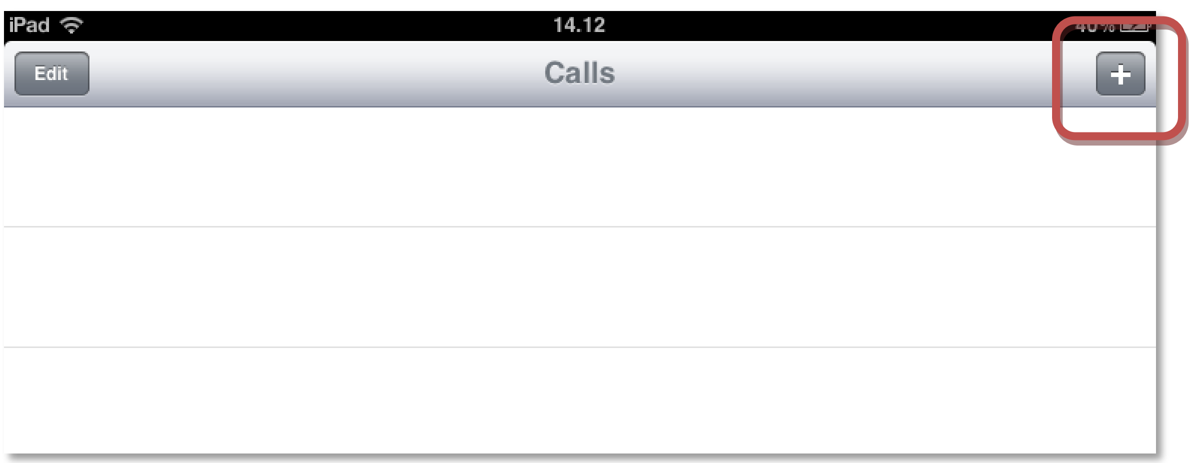
The iPlanner uses the menu-item indicators mentioned above, to keep you updated with the status and next required steps for each of your calls.

7 How to set up a call:

This chapter will run through all elements of setting up and executing a call. There are other ways to run calls which will be explained later, but to familiarize you with the basic functions and processes, this chapter will concern itself purely with the "Standard" way of setting up and running a call.
The standard way of creating a new call is to tap "Calls" on the toolbar.

This will bring up the list of "Calls" on your iPlanner. Note that if this is the first time you access this screen, the list will be blank, as no calls have been created yet.

To create a new call, tap the + button at the top right corner on the calls list:



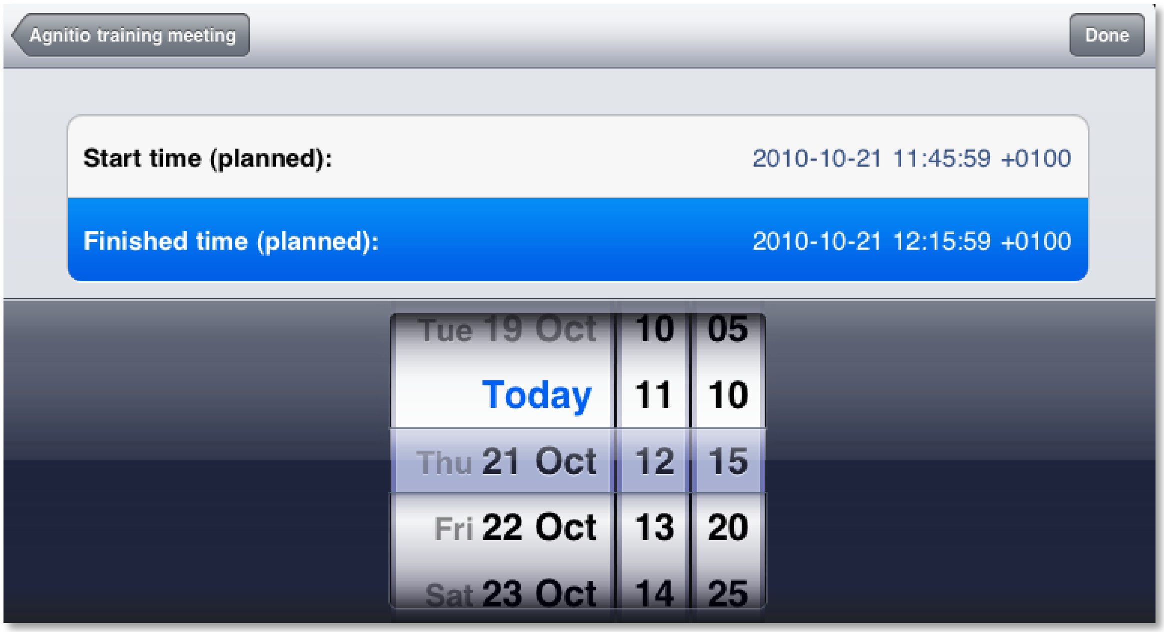
7.1 General Info and Objectives

You will now be shown a very basic overview of the call you are creating. It will initially contain some automated information, based on the time you started creating the call:

You can, if you wish, add and change information under the heading "General Info". Tapping the "Description" or "Location" fields will bring up the iPad keyboard, allowing you to change the information listed here.

You may also want to add notes regarding the call Objectives, by tapping the "Call Objectives" label, and using the pop-up keyboard to add any information you may find relevant

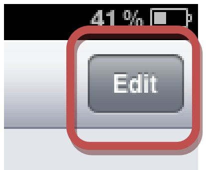
Tapping the "Planned start / Planned Finish" field will bring up a date-and-time Spinner. Click either start time or finished time, and use your finger to swipe the spinner to the appropriate time and date, and tap "Done" when you are satisfied:



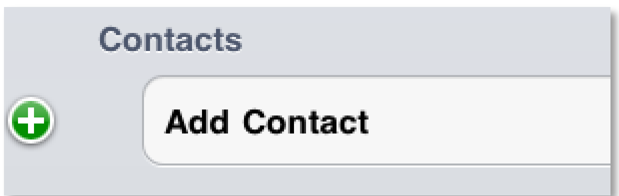
After adding any information you may require, your screen could look something like this:

7.2 Adding one or more Contacts to the meeting:

In the top right-hand corner, tap Edit to add contacts / customers to your Call:



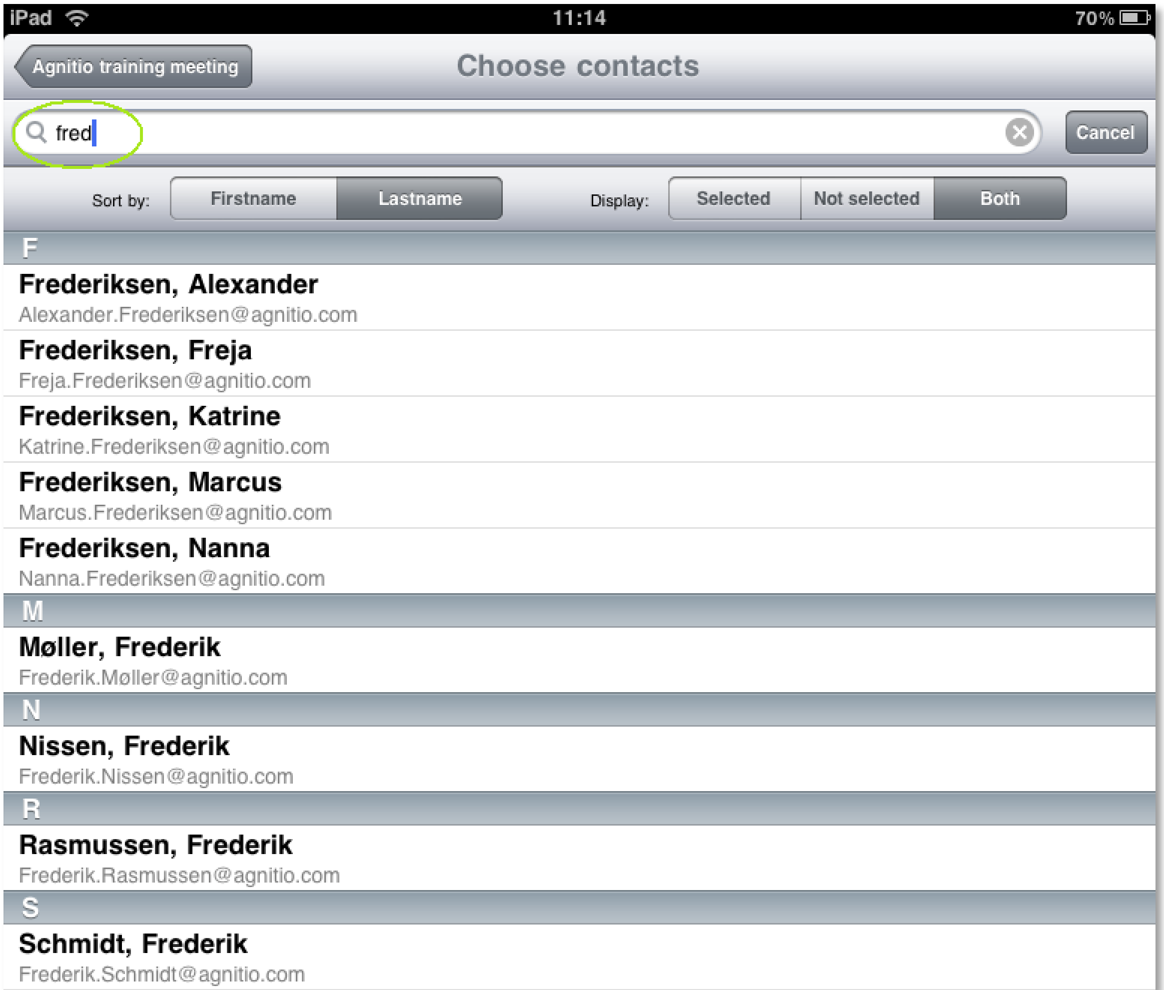
This will open up the Contacts-field, allowing you to add one or more participants to your call:



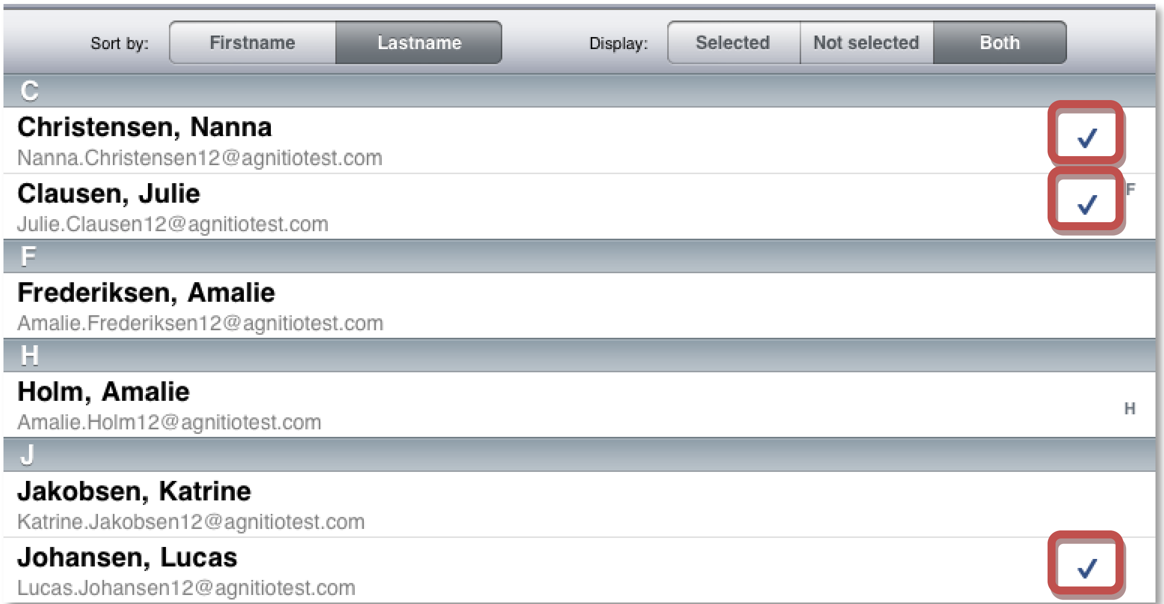
Tap the green plus-sign to access your contacts list.

This list contains all contacts assigned to you, and provides you with the ability to sort by first or last name, and also provides you with a field for free-text searches. The iPlanner will dynamically search your contact list for any person or persons with first or last names containing the text you've written in the search-field.

Here is an example of a search using the text "Fred":

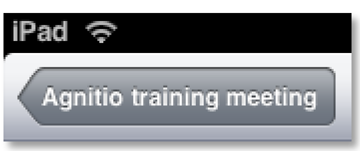


Tapping a person on this list will add them as participants to the call, indicated with a tick-mark to the right of the name. You may add as many people as you need. Tapping a name a second time removes the tick-mark again, and removes the person from the call.

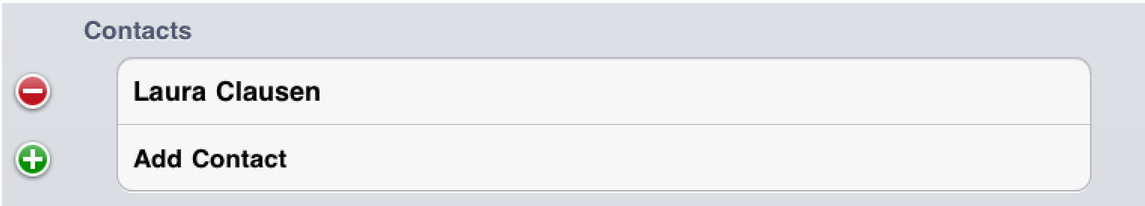


If you lose track of who you have or haven't selected as participants, you may use the "Display"-filter, to only show people that you have selected, people you have NOT selected, or both:

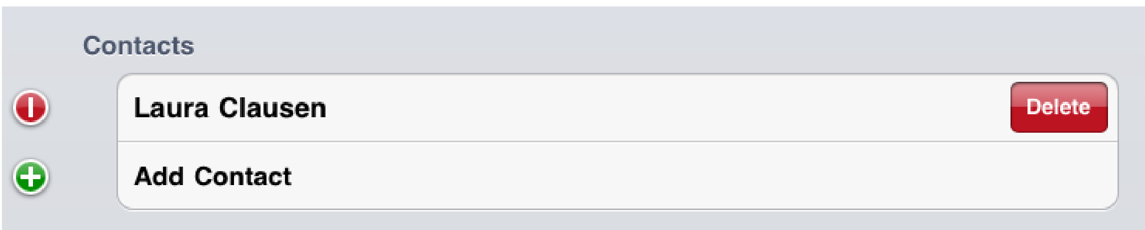
When you are happy with your selection, tap the icon in the top-left corner, to return to the call overview. Note that the label of this icon will have changed to whatever you named the call in the "Description Field". In this case "Agnitio training meeting"



From the meeting overview, you can quickly add another contact, or remove one from the call:



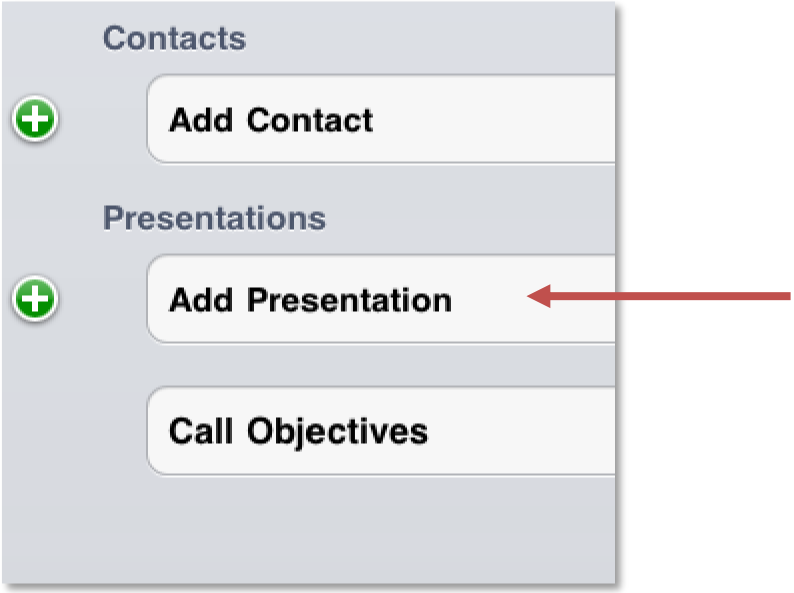
Tapping the Minus-sign brings up a confirmation-box to the right of the name. tapping this "Delete"-button removes the participant from the call:



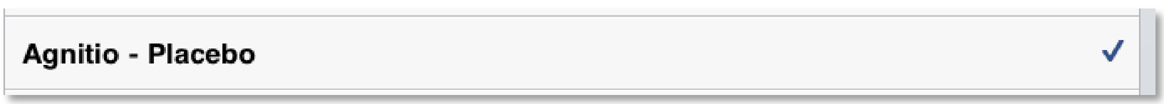
*Note: When you are *NOT* in editing-mode, you can tap a contact in your contacts-list on the call, which will take you to a view showing basic information of this contact, such as name, address, e-mail, and various targeting-information, provided to the Agnitio iPlanner from your CRM-systems.*

7.3 Adding one or more presentations to the meeting:

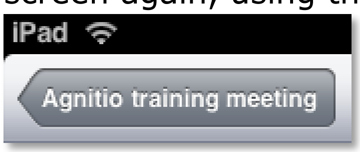
While still in "Edit"-mode on the call, you will also see that the "Add Presentation" field has become active. Tap the green Plus-sign, to be taken to the presentation selection screen:



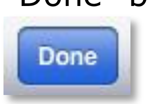
In this list, tap one or more presentations to select them for the call. As with contacts, a selected item is indicated with a tick-mark, and tapping that item again removes the tick-mark, and de-selects it.



When you have selected your presentation(s), return to the main call screen again, using the top left icon:



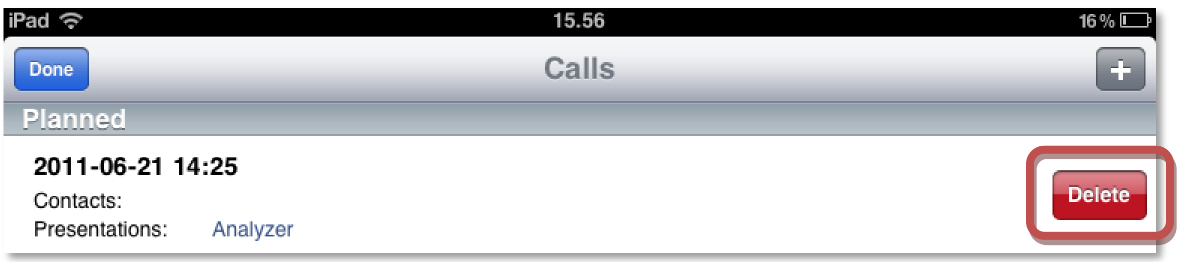
When you have selected your presentations and contacts, hit the “Done” button in the top right corner, to leave editing-mode:



7.4 Deleting a meeting:

If you wish to remove a meeting from your iPlanner calendar, place your finger on the meeting in the calendar, and swipe your finger to the left:

This will cause a "Delete" button to appear on the meeting. Tap this to remove the meeting from the calendar:

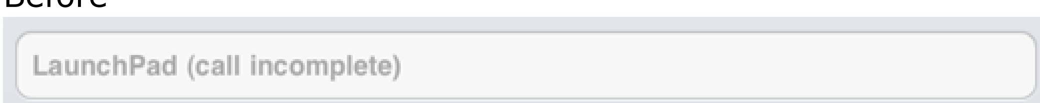


7.5 Launching the presentation(s):

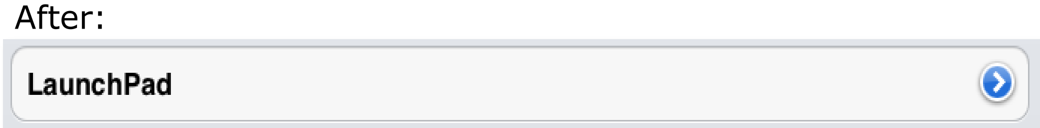
With at least one contact and at least one presentation selected, you are ready to perform your call.

When a call has at least one contact and at least one Presentation attached to it, the "LaunchPad" field at the top of the call screen changes to indicate that you're ready to go:

Before



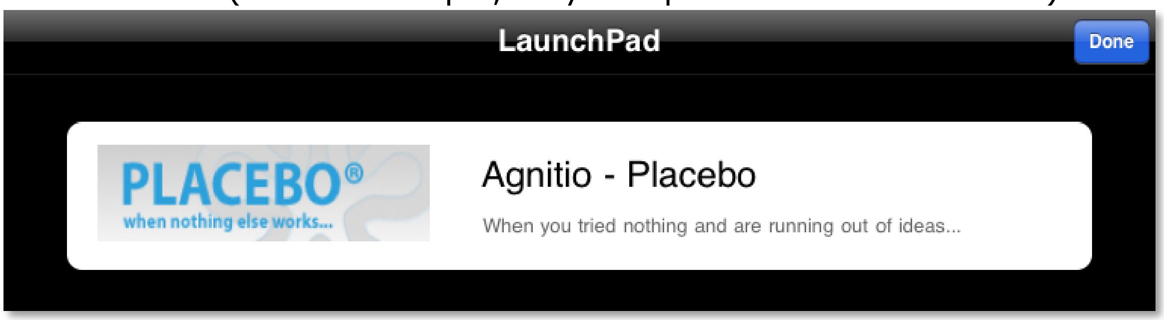
After:



Also, on the "Calls" list, you can see that the call has changed status to "Ready"

Tapping the now active "LaunchPad" field will run your presentation.

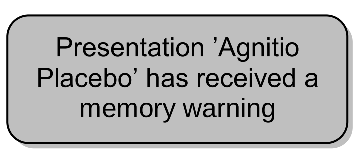
In case you have selected several presentations, the LaunchPad screen will show you a list of the presentations you have selected. Tap one of them to start (In this example, only one presentation is selected):



7.6 Memory Warnings

The Apple iPad has a limited amount of available memory (RAM). Specifically, the iPad 1 has 256Mb of RAM, and the iPad 2 has 512Mb of RAM. This imposes some restrictions to how many applications you can have running on your iPad at the same time, as each individual application consumes some of the available memory.

The Agnitio iPlanner contains a "Memory Warning" functionality, that will alert the users if a Presentation is started up, and limited memory is available:



If you receive an error like this, you should consider shutting down one or more applications running in the background. The Apple iPad will automatically shut down applications if it runs out of memory, so receiving this error means there is a risk that your iPlanner will be suddenly shut down while you are running the presentation.

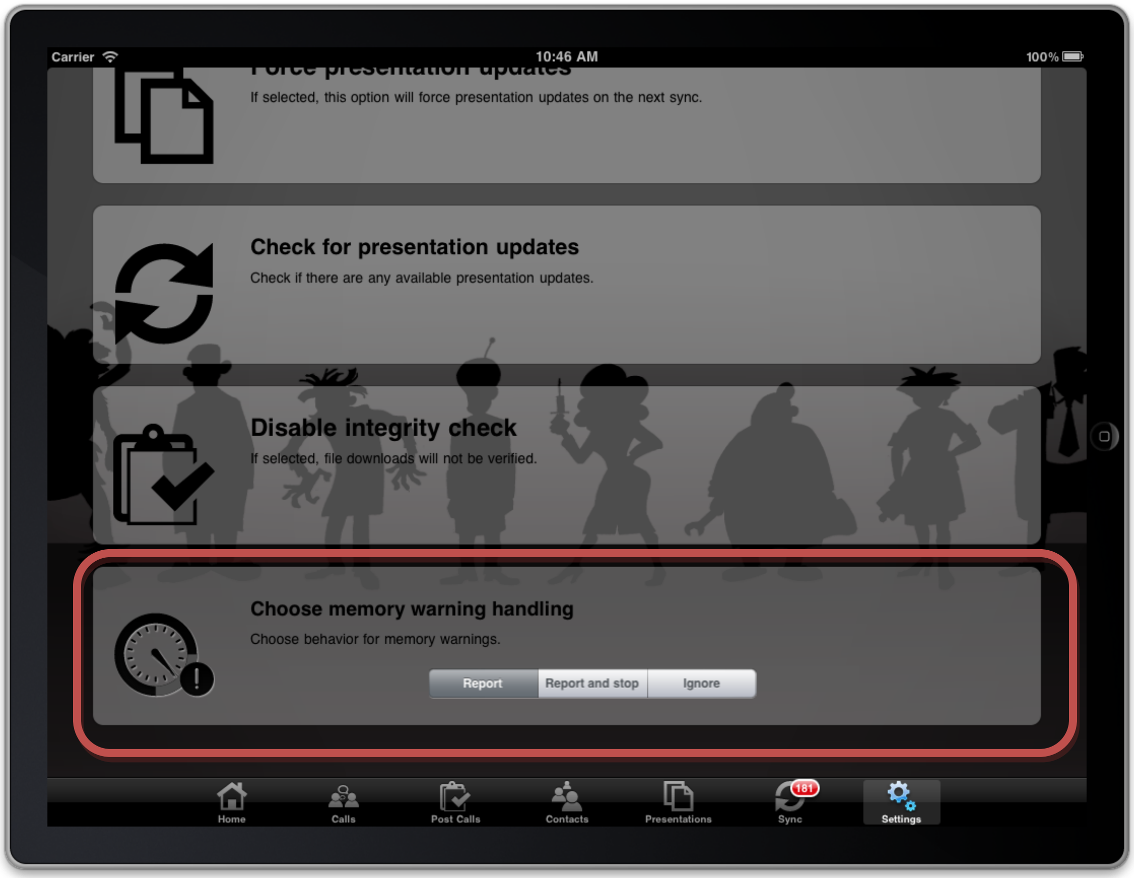
To manually shut down applications running in the background, double-click the "Home"-button on the bottom of the device. This will open a display at the bottom of the screen, showing which applications you are currently running. Tap and hold your finger on any one of the applications for 2 seconds, and they will start to "shake".

While "shaking", the icons of the applications will also have a small red icon in the top left corner:

Tap this red icon to completely shut down an application, so it does not consume memory anymore. When you are finished shutting down any applications you are not using, click the "Home"-button once to go out of "Shaking"-mode, and once again to remove the menu-bar at the bottom.

If you do not wish to receive the memory warnings, they may be disabled in the “Settings”-menu of the iPlanner.

Scroll down to the bottom of the “Settings”-menu, and you will find the option “Choose memory warning handling”



There are 3 options for handling the Error-warnings, depending on the level of warning that you would like to receive:

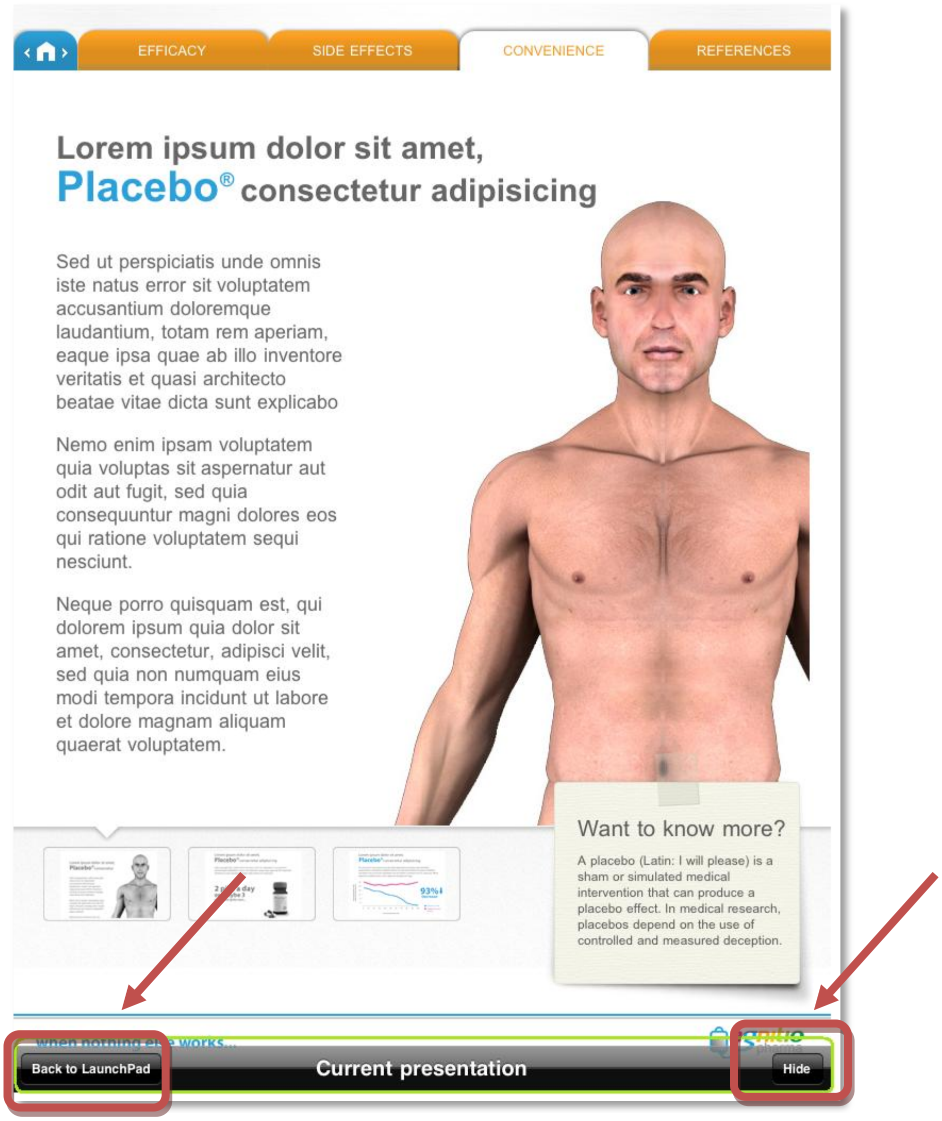
- **Report.** This option will display the Memory-warning once, but allows you to continue using the tool. Users should be aware, that receiving a memory-warning means that the memory is in danger of running out, so shutting down other Apps should be considered
- **Report and Stop.** This option shows a Memory-warning, and then loads a blank page, to ensure that the iPlanner isn't shut down.
- **Ignore**. With this option selected, no warnings will be shown at any point. This option should only be used if you are confident that you won't have any memory-issues. A small warning will pop up if you select this option:

7.7 Running and finishing your presentation

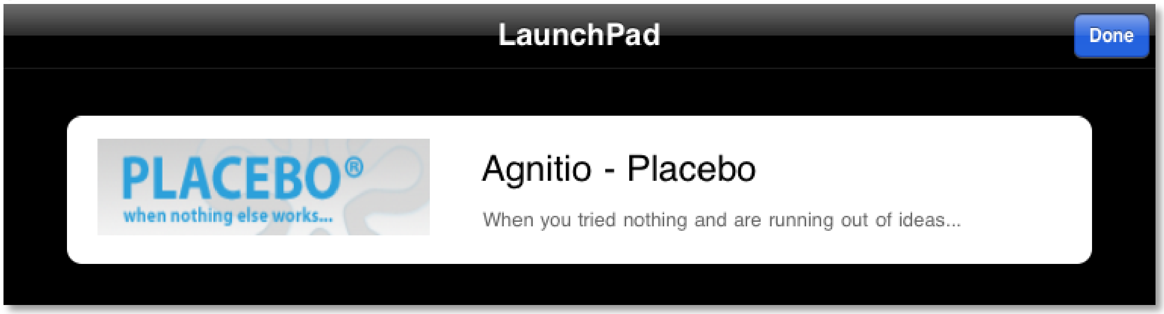
You can now perform the call and the presentations, in accordance with the guidelines laid out by the brand-teams. The path you take through the presentation and the chapters you access, as well as the time spent on each chapter will be recorded automatically and attached to the information for this call. This allows a very detailed analysis of exactly which chapters have been used more than others, which topics have been discussed extensively, and which topics have been skipped or only detailed briefly.

When you are done with a presentation, double-tap anywhere on the screen. This will show a small menu-line at the bottom of your screen:

Tap "Back to LaunchPad" to return to the LaunchPad-screen, to either select a new presentation and continue the call, or to finish the call. Double-tap anywhere, or tap "Hide" to remove the menu-bar again.



Back on the LaunchPad, tap the "Done"-button when you've finished your call:



Note that you should not use the iPad-button to exit a presentation, as this will close down the entire Agnitio iPlanner application

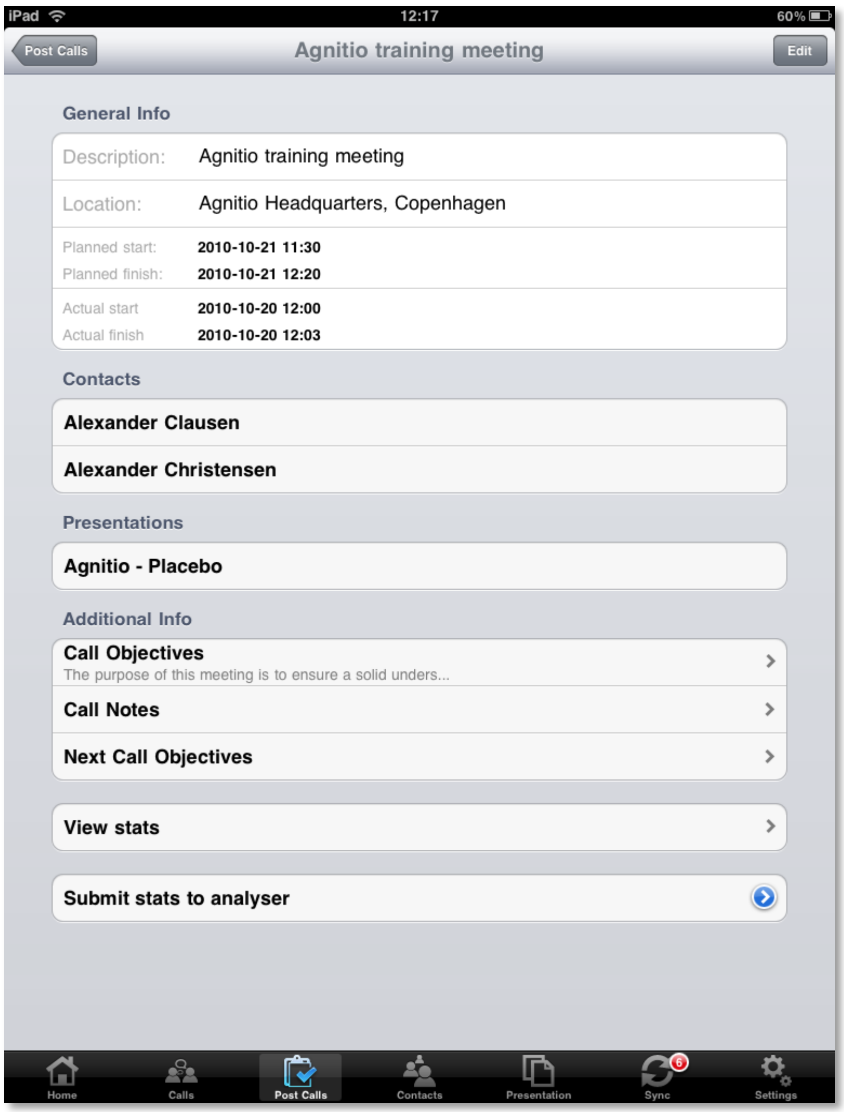
8 Post Calls

Once a Call has been performed, it will no longer show up in the "Calls" list. It has now been moved to the "Post Calls" menu, found on the tool-bar at the bottom of the iPlanner screen.

If a call has been performed, such as the Test Call in Chapter 6, an indicator on the Post Call menu-item will show you that there is a new Post Call for you to edit (if needed), and then submit to the Analyzer-server:

8.1 Post call editing

Tapping the "Post calls" icon on the tool-bar will provide you with a list of unsubmitted calls. These are calls that have been performed, but which have not yet been checked and edited by the user, and submitted to the Analyzer-server. If you tap one of these presentations, you will see a summary of the call:



Using the same methods as outlined in chapter 7, you can edit information on the call such as description, start-time, objectives, etc.

Tapping the "Edit"-function also allows you to add or remove contacts and presentations from the call if needed, just like you did when setting up the call initially.

Note that if you have a large number of contacts or a large number of presentations on the call, you may need to scroll down the screen, by swiping a finger vertically on the iPad screen.

8.2 Additional fields on the Post call screen

Under the heading "Additional Info", you will see 2 additional fields, that pertain to the reporting and submitting of a call.

One is **"Call Notes"**, which is a free text field, allowing you to fill in any information about the contents, quality, and events of the call.

The other field is **"Next call Objectives"** which is also a free text field for filling in any reminders or notes for the next meeting you have with a given contact.

In both cases, tapping this field will bring up a blank note-field, and a tap on this field will bring up the iPad pop-up keyboard, allowing you to fill in any details you may find relevant.

> *Note: please refer to your CRM/CLM or sales management for instructions on which, if any, of these free-text fields you are required to fill out.*

8.3 View stats

Tapping this menu-point allows you to see an overview of the data that has been recorded during this call. Typically, this will show you which chapters and slides you have used and in which order, and also show you how much time has been spent on each slide. Depending on how the presentation has been constructed by your marketing department, more or less information may be available here. This varies from presentation to presentation.

8.4 Submit stats to Analyzer

When you are happy with the contents of your call, and you are done with the editing, you should tap this field, which will move the call from the "Post call" menu to the "Sync" menu

9 The "Sync"-menu

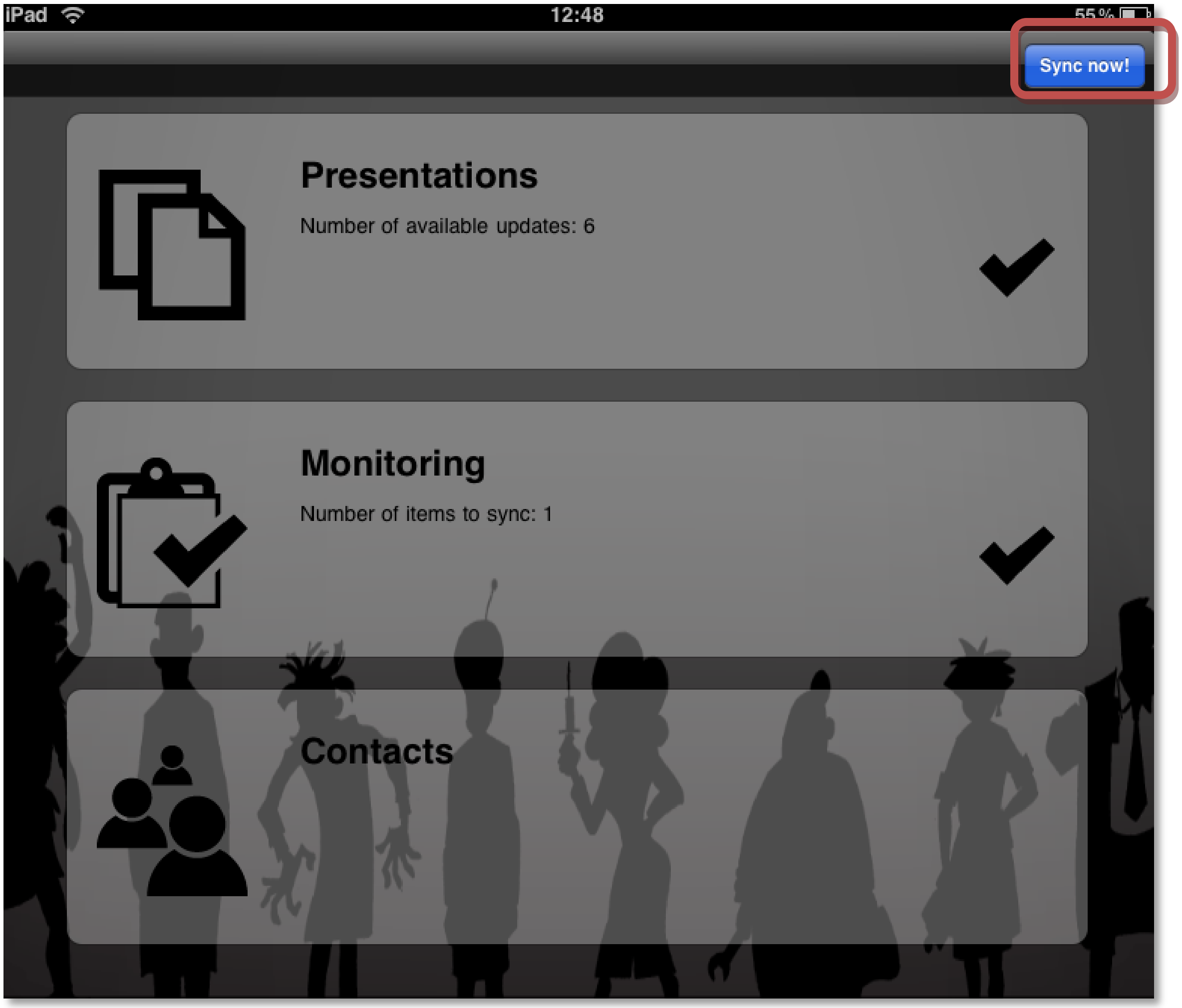
The "Last Stop" for a Call as it moves through the iPlanner is the "Sync" menu, found on the Tool-bar at the bottom of the application. As with other menu-icons, a small indicator will show you if there are any items that require your attention:

Accessing the Sync-menu will show you specifically what needs to be synchronized to and from your iPad.

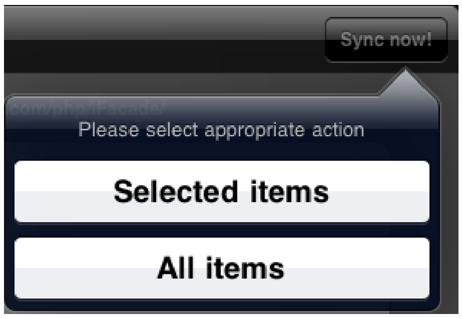
Items to be synchronized fall into three categories:

- **Presentations –** Any new presentations or updates to current presentations to be synchronized to your iPad. Whenever your iPad is connected to the internet, it will check with the servers to see if there are any new presentations available for download
- **Monitoring –** These are the Calls that have been performed on your iPad, including the recorded Monitoring-data on exactly how the presentation has been used. These need to be synchronized from your iPad to the Analyzer servers
- **Contacts –** Any changes or updates to the list of contacts you have on your iPad, synchronized from the servers to your iPad. Whenever your iPad is connected to the internet, it will check with the servers to see if there are any updates to your targets that need to be downloaded

On each item, you will also be able to see how many elements you have that need synchronization. You may tap on one of the elements to specifically select it for synchronization. The item will then be marked with a tick-mark:



Finally, when tapping the “Sync now”-button at the top right, you will be presented with a selection . You may decide to synchronise all updates back and forth, or decide to only synchronise the elements that you have specifically selected:



A progress-bar on each element will show you how far the synchronization-process has progressed for each item:

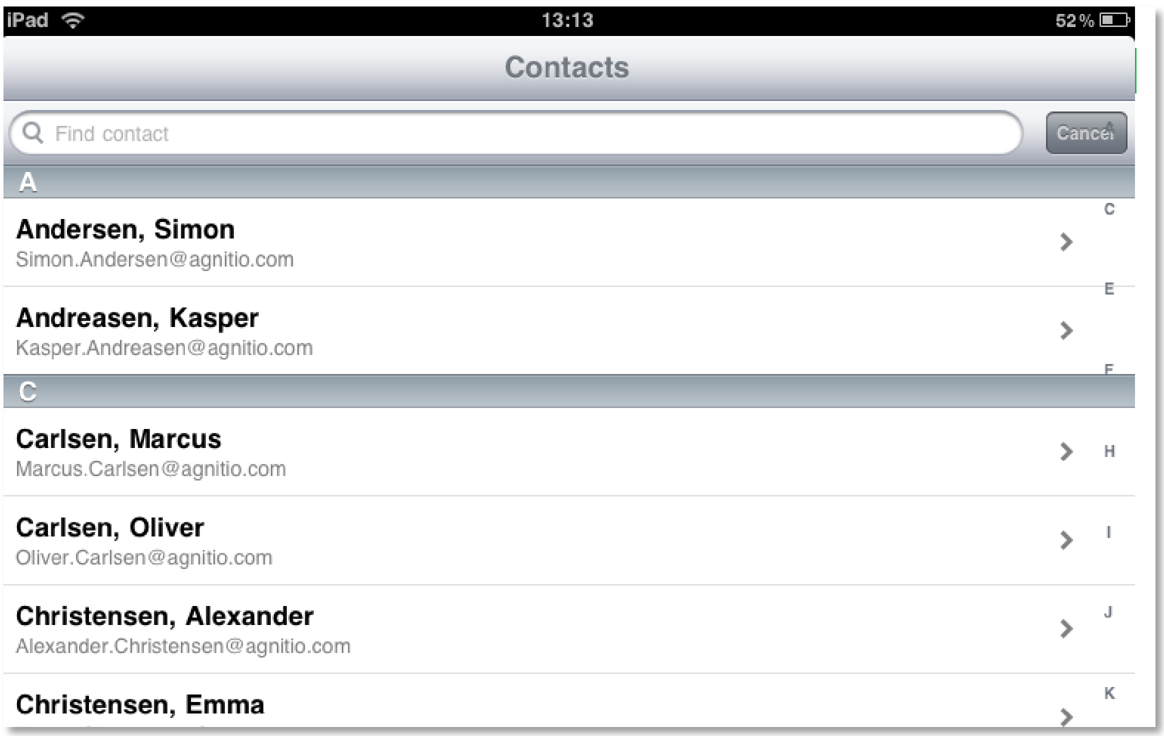
Should you lose your connection to the internet during the synchronization, the elements that have not been completely synchronized will restart when access is re-established.

For advanced users, there are three additional options for synchronization available on the “Settings”-menu (See Chapter 13).

10 The "Contacts"-menu

Via the Contacts-menu, you can see the list of contacts assigned to you.

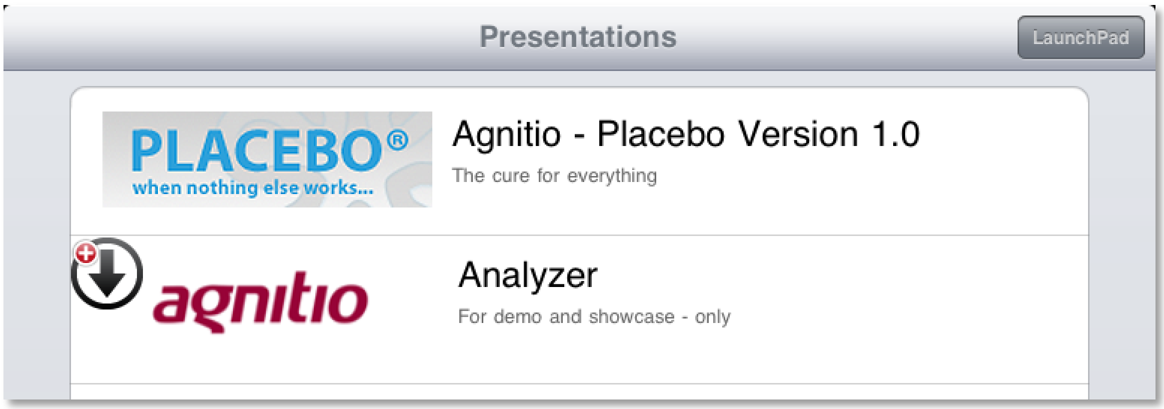
You can scroll up and down on the list, and using the free-text search-field at the top of the screen, you can query for a specific contact. Any text you fill in here is dynamically checked against the first and last names of the people in your contact-list, and any matching contacts are displayed, in the same way as discussed in chapter 7.



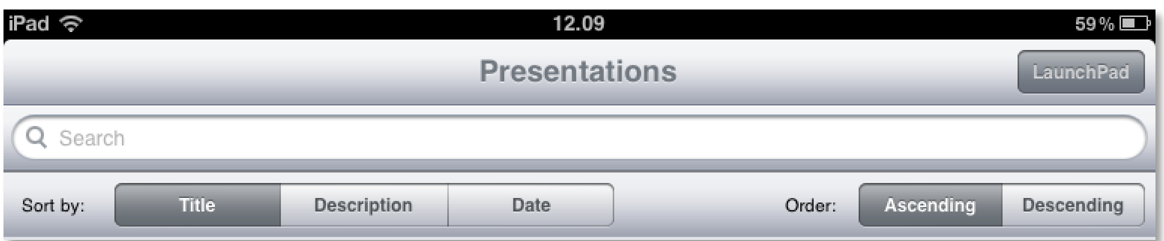
If you tap a specific name on the screen, you will be shown detailed information about the contact, such as name, address, gender, targeting information etc. The actual contents depend on what your organisation has requested that the iPlanner displays.

11 The "Presentations"-menu

On the Presentations-menu, you can see all the presentations that you have assigned to you.



If you place your finger on the list, and scroll up slightly, you will also see a searching-function, allowing you to search for presentations, based on their titles, descriptions or dates:

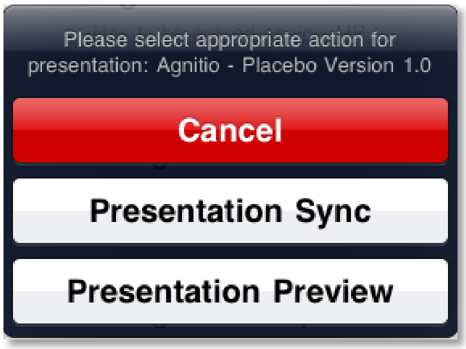


You can start a "Cold Call" from the Presentations-menu (see chapter 11), but you can also preview Presentations or do individual downloads of the Presentations

11.1 Presentation Preview

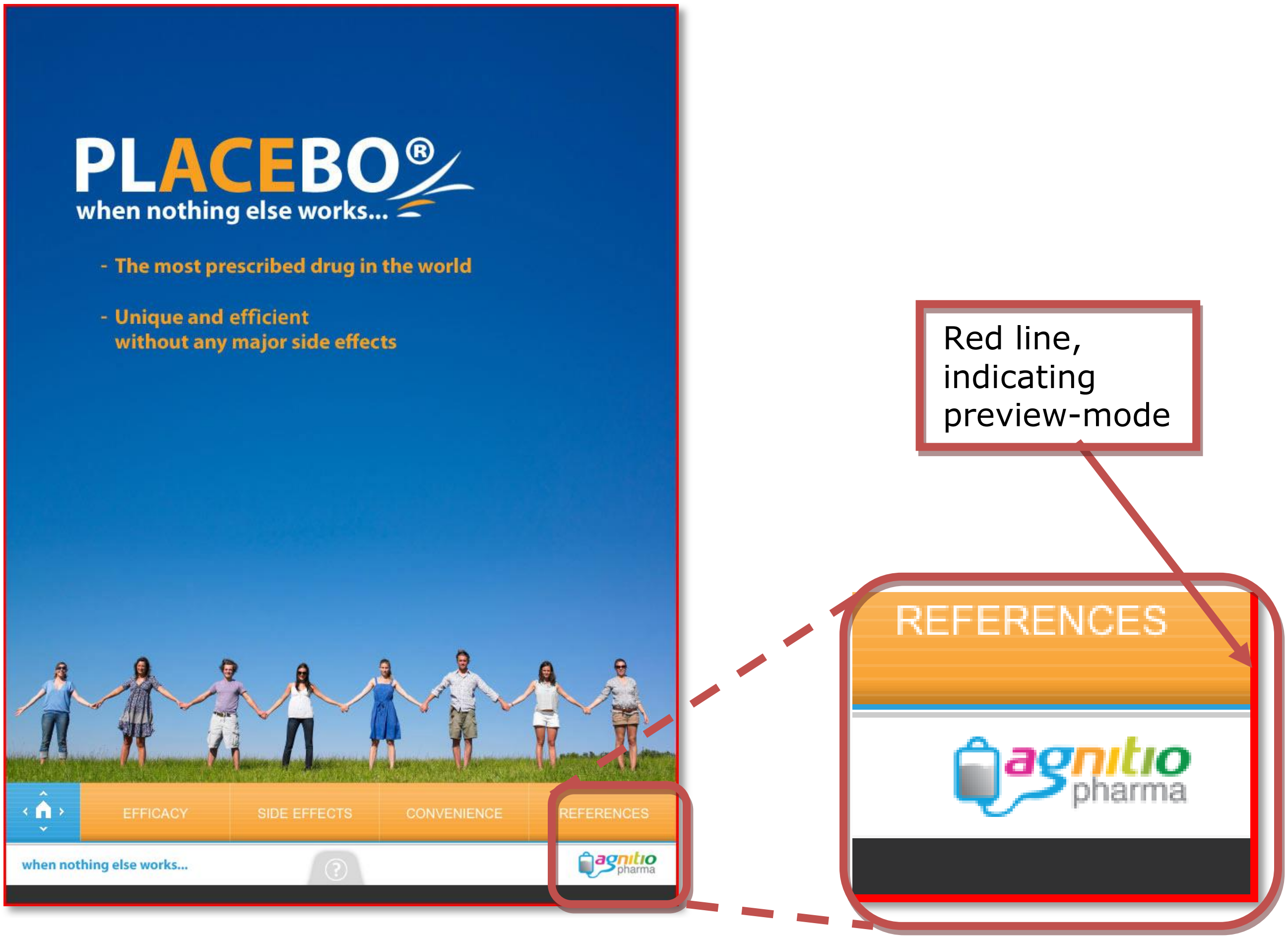
If you wish to just browse through a Presentation without actually recording a Call while doing so, you can "Preview" a Presentation.

To do so, place and hold your finger on the Presentation you wish to preview. Holding down for 1 second will display a pop-up menu:

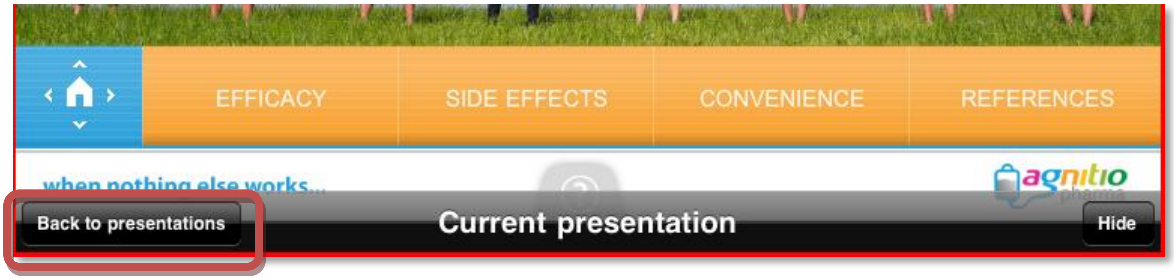


Select "Presentation Preview" to run a Presentation in Preview-mode. In Preview-mode, the Presentation will function exactly like it would during a call, but no data is recorded, and there will be no Call generated.

When viewing a presentation in preview-mode, a red outline will be visible around the presentation. Since no data is recorded in this mode, it is important that the user is aware that he/she is in Preview-mode, to avoid accidentally conducting a full sales-call in Preview-mode, and then not having any data available afterwards.


PLACEBO®
when nothing else works...
- The most prescribed drug in the world
- Unique and efficient
without any major side effects
EFFICACY
SIDE EFFECTS
CONVENIENCE
REFERENCES
when nothing else works...
agnitio pharma
Red line, indicating preview-mode
REFERENCES
agnitio pharma

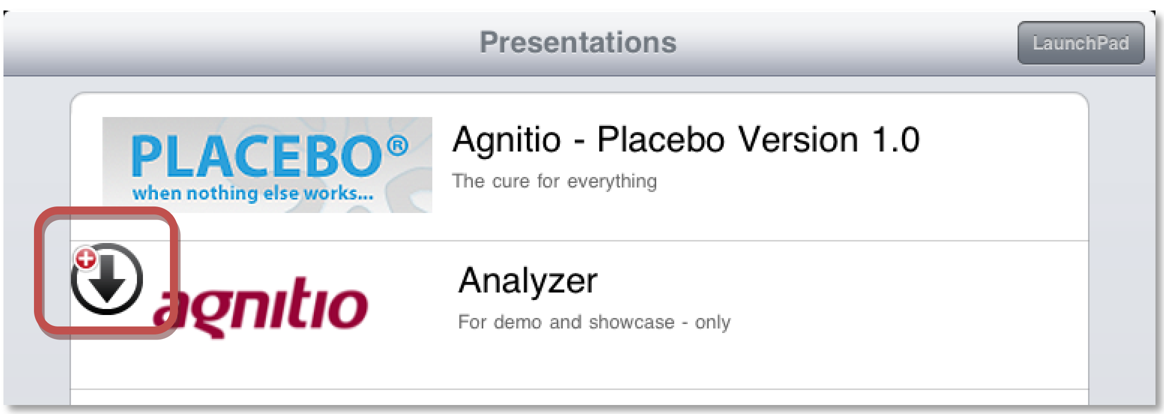
To exit preview-mode, double-tap anywhere on the screen, and select "Back to Presentations" from the menu-bar on the bottom, to return to the "Presentations"-menu:



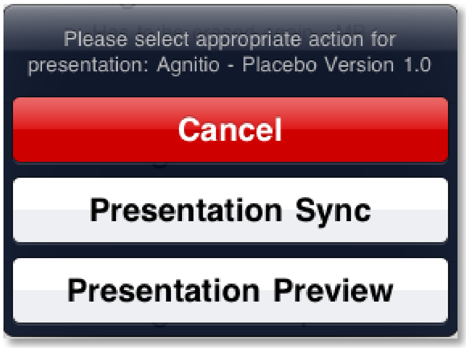
11.2 Individual Presentation Synchronisation

On the Presentation-menu, you will also see an indication on a presentation if it hasn't been downloaded yet, or if there is an update to the presentation. If you have many presentations, or if you are short on time, it may be relevant to only download that specific presentation.

If a new download is available, it will be indicated on the relevant presentation with an icon:



If you wish to synchronise an individual presentation, place and hold your finger on the presentation you wish to synchronise. Holding down for 1 second will display a pop-up menu:



Select"Presentation Sync" from the menu, to initiate a synchronization of that specific presentation. A progress-bar on the presentation will show you when the presentation synchronisation is complete.

12 "Cold calls"

Occasionally, you will be performing a quick or impromptu call, a canvas-call, or otherwise a call where you need to access your presentation quickly, and start detailing quickly. In the Agnitio iPlanner, this is referred to as a "Cold call".

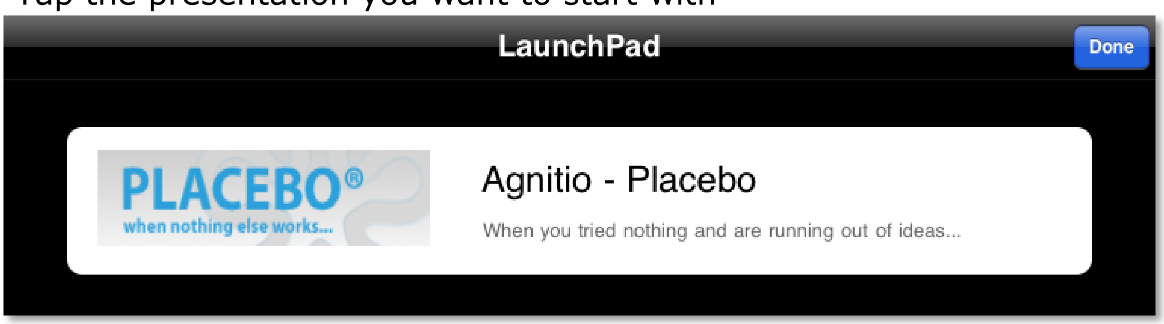
On a cold call, you will be heading straight to the presentation you need, and then fill in any information needed afterwards. This allows you to go from bumping into a doctor, to detailing your products in just a few seconds.

12.1 Starting a Cold call

To create a cold call, simply go straight to the "Presentation"-menu on the iPlanner tool-bar:

Tap a one or more presentations, and tap the "LaunchPad"-button at the top right

Tap the presentation you want to start with



And start detailing:

As outlined in chapter 6, you may double-tap anywhere on the presentation to access the LaunchPad again, to finish your call, or to select the next presentation you wish to use.

Once you are finished detailing, tap the "Done" button from the LaunchPad-page.

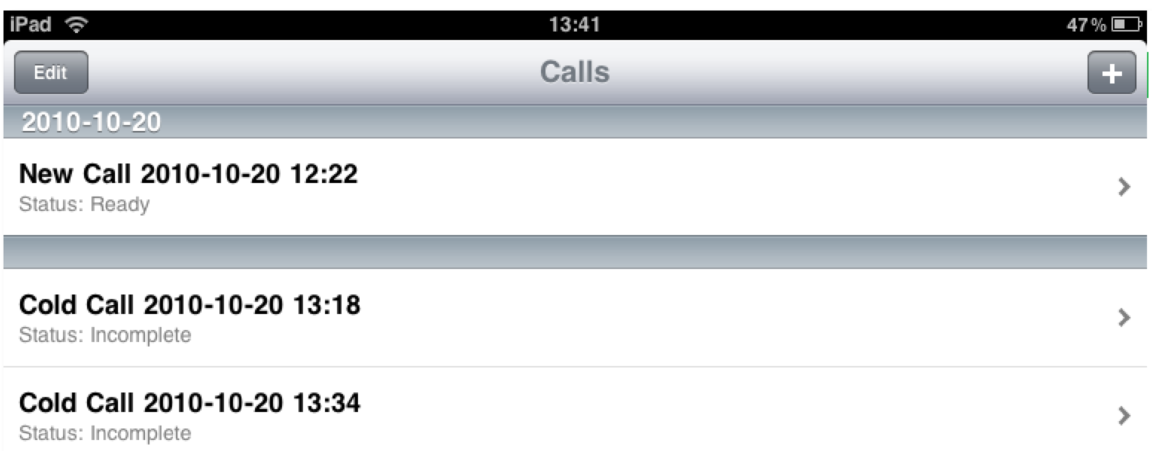
12.2 Editing and submitting a "Cold call"

When you perform a cold call, you enter no information regarding time, place and participants beforehand.

> *Note: To ensure that a cold call goes through the same processes and logic as any other call, a cold call will *NOT* be placed under the "Post Call"-menu, but will be placed one step before, under the "Calls"-menu.*

You are notified and reminded that there are new "Cold Calls" to work on, by the iPlanner adding an indication on the "Calls" menu-item in the iPlanner tool-bar:

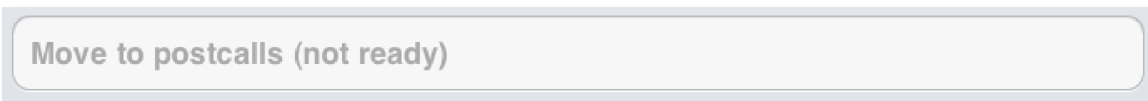
When you access the "Calls"-menu, you will see that your "Cold Calls" show up in a separate area. Since no description has been entered yet, all cold calls just have the description "Cold Call" plus the date and time when the call was performed:



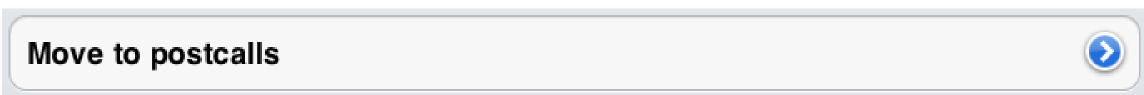
To move a cold call along, you need to enter "Edit" mode, and add at least one contact. You may also wish to change the description, the date, the location, and add any cal objectives, if you wish.

Since the one thing that the iPlanner knows is which presentations you've used for the cold call, this field is already filled out, and obviously cannot be changed, as it is already a piece of historical data.

When at least one contact has been added to the cold call, the call contains enough information to be moved along. The field at the top of the screen will change label, and become active, signifying the change from "Not Ready":



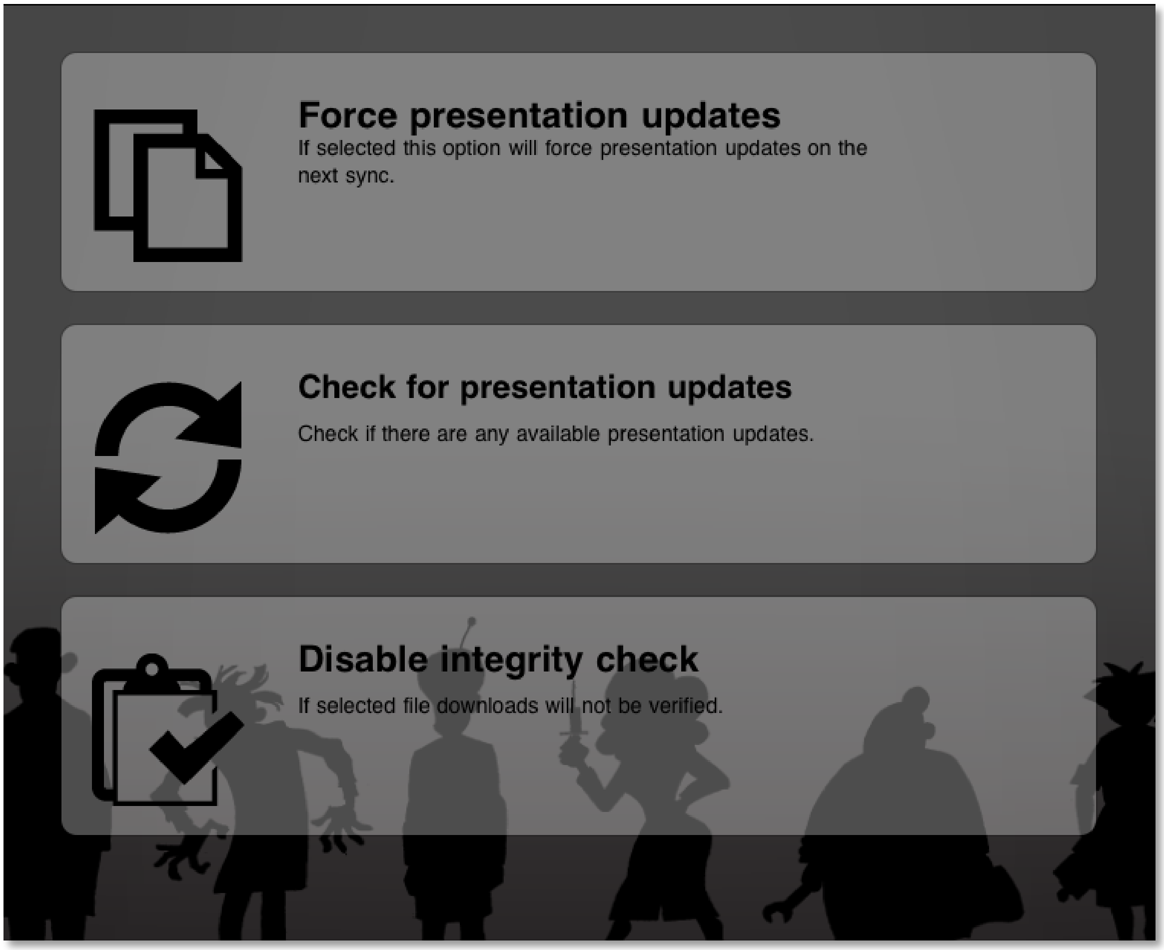
To ready:



Once you tap "Move to postcalls", your cold call moves from "Calls" to "Post Calls". Here you can add any further information you may need, before submitting the call. Please refer to chapter 7 for details on editing and submitting calls

13 The “Settings”-menu

In addition to the Memory Warnings setting discussed in Chapter 7.6, the “Settings”-menu contains 3 optional settings for advanced users to manage how synchronization is handled:



13.1 Force presentation updates

If selected, this option will force a full update of all presentations the next time you perform a synchronisation. This option may be used if you suspect that your Presentation has been damaged or corrupted in any way

13.2 Check for Presentation Updates

If you tap on this option, the iPlanner will attempt to connect to the internet, and check for updates on presentations or contact lists immediately. This option can be useful if you are expecting a new presentation-update to become available to you while you are working in the iPlanner.

13.3 Disable integrity check

You may occasionally find yourself trying to update presentations through a WiFi-connection that uses file-compression. Certain types of file-compression can cause files to not be downloaded correctly, since the iPlanner detects a mismatch in the file-size between the expected file, and the compressed file that it is receiving.

If you are experiencing problems updating your presentations due to a compressed WiFi, you can tap the setting "Disable integrity check". This will temporarily disable the function that compares the file-sizes, and allow your Presentations to update correctly despite being connected to a WiFi using File-compression.

The iPlanner will automatically revert to the default setting when it is shut down, to ensure that the integrity check is re-applied.

14 Localisation

In addition to English, the Agnitio iPlanner can display menus and messages in 11 additional languages. These are:

- French
- German
- Chinese (simplified)
- Dutch
- Italian
- Spanish
- Portuguese
- Japanese
- Russian
- Polish
- Turkish

If your iPad is set to one of these languages in the normal iPad settings-menu, the user interface of the iPlanner will automatically display in this language. If your iPad is set to any other language than the ones above, the iPlanner will revert to the default language, which is English.

15 Conclusion

You should now be able to perform Closed Loop Marketing details using the Agnitio iPlanner. All of us here at Agnitio hope that you will enjoy the possibilities offered by these exciting new devices and by the tools we have been happy to provide you with!