



User Manual for ChatViatris

Objective:

This handbook provides users with guidelines for querying tools within ChatViatris effectively:

- [Chat Assisted Search](#)
- [Supervised Content Creation](#)
- [Chat Data Insights](#)
- [General Assistant](#)
- [Sales Assistant](#)

By following these guidelines, users can maximize the accuracy and usefulness of the tool's results. The handbook aims to help users understand the key points to consider when formulating their queries. Based on user feedback, we aim to enhance the tool's performance and user experience over time.

1. User Manual for Chat Assisted Search

Chat Assisted Search - A tool that leverages Generative Artificial Intelligence to rapidly locate the solutions to user queries from Viatris existing knowledge base.

Accessing ChatViatris:

1. Open your preferred web browser
2. Enter the URL: <https://chatviatris-pilot.azurewebsites.net/>

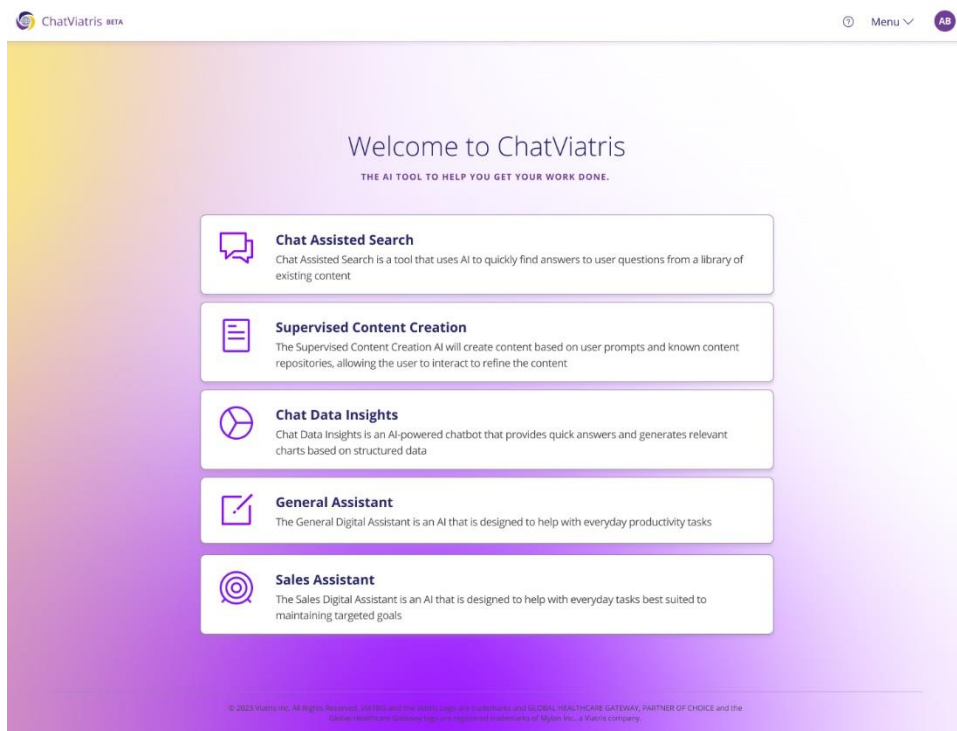


Figure 1 | Dashboard View

User Interface Overview:

- Upon accessing the URL, you will be presented with the chat interface.
- The menu drop down will show links to tools you can navigate to in ChatViatris.
- Users can select Chat Assisted Search tool.
- The main chat window will display the space for a new conversation.
- The left panel will show you your Chat Session History

- Under the breadcrumb, a drop down will show other search instance options you have access to (Instance: HR Service Center FAQs)

Starting a new chat:

There are three ways to start a chat:

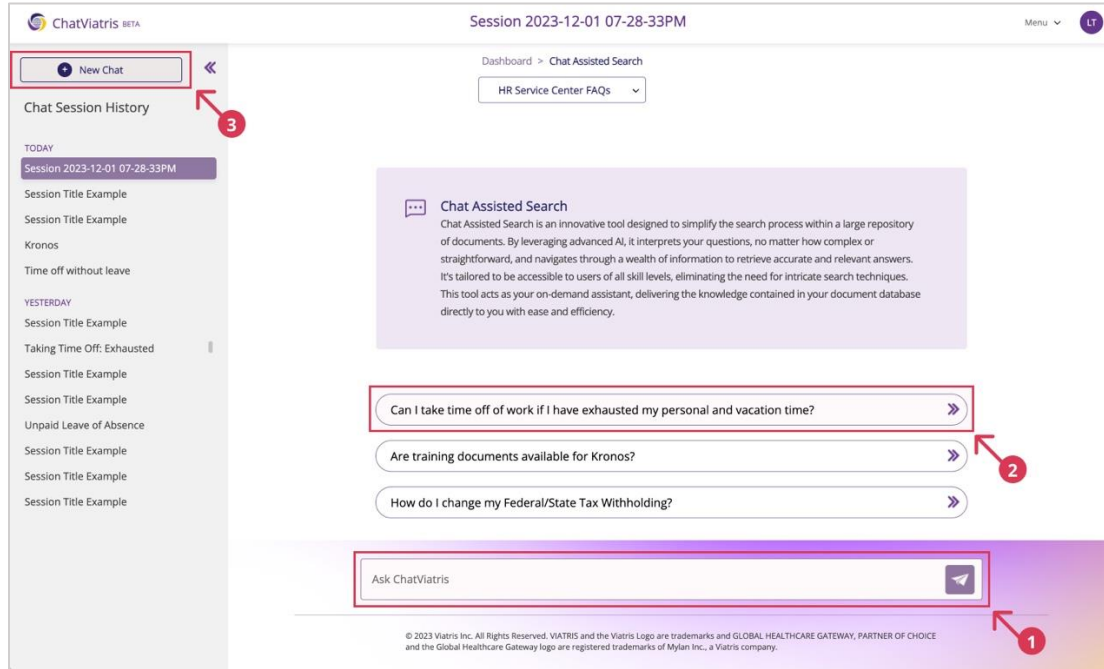


Figure 22 | Chat Assisted Search Landing showcasing three ways to start a prompt

1. Type a question in the “Ask ChatViatrix” box
2. Select a pre-written prompt to kick off a conversation asking that question
3. Select the “New Chat” button in the Chat Session History panel on the left

Use clear and specific language:

- Ask questions in a clear and specific manner to obtain accurate results.
- Ask any follow up questions if needed
- Good Question: "Can I take off work if I have exhausted my personal and vacation time?"
- Bad Question: "Can I ditch work if I have no vacation?"

Provide necessary context:

- Include any relevant context or parameters for your query.
- Good Question: "What is our company's policy on parental leave?"
- Bad Question: "What is the policy here?"

Provide feedback:

- Share feedback on any queries that worked/did not work as expected using the thumbs up/down button

Restricted Queries:

- This tool will not answer the questions' about

- Politics
 - Sports
 - Religion
 - Gambling
 - Alcohol
 - Drugs
- This tool won't reply to questions that are unrelated to the HR Service domain.

Scenario based questions for HR Service Center FAQ's

Below are some scenario examples to ask series of questions in a single session.

Scenario 1 - Session 1 – HR service rep wants to know about leaves after exhausting leave balance, followed by a question on medical condition questions.

- Q1 - Is it possible to take time off when I have already exhausted all my leaves?
- Q2 - Can I continue my HSA contributions after enrolling in Medicare?
- Q3 - What if the employee is suffering from a serious medical condition?

Scenario 2 - Session 2 – HR service rep wants to know what are the various dependent benefits that the company provides.

- Q1 - Are dependents covered under Viatris benefits?
- Q2 - For how long will my dependent child be covered?
- Q3 - My son is in the military, is there anything different for him?

Scenario 3 - HR service rep wants to identity the conversation in a different way for future reference

- Rename the chat session by using the chat history panel, please find the screenshot below.

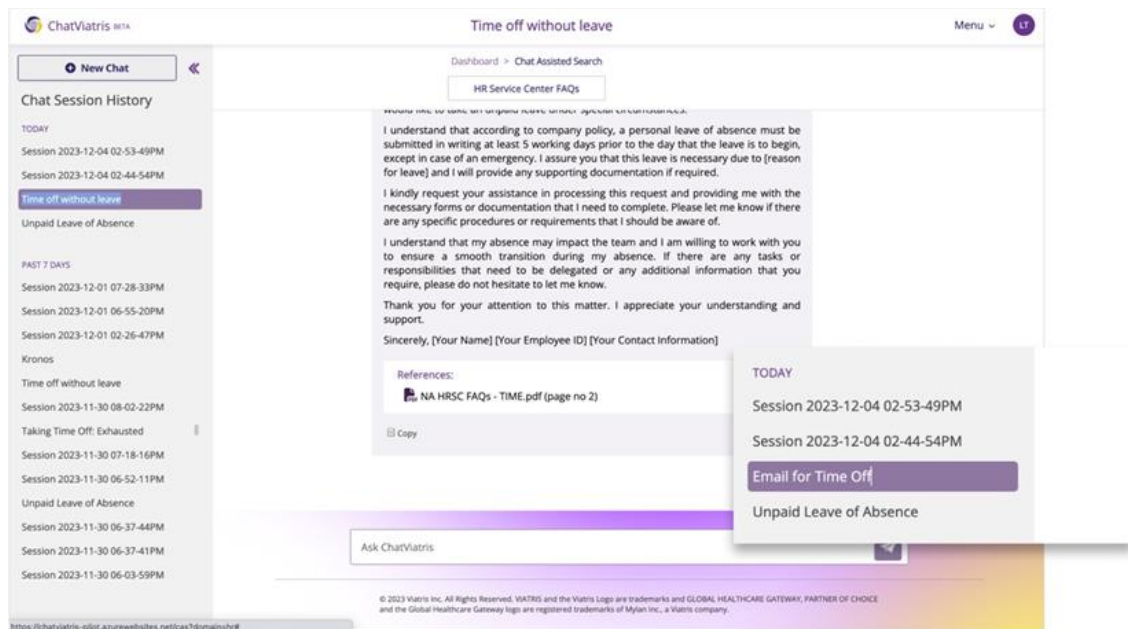


Figure 3 | Selecting Session Name and Typing a New One Before Hitting Enter

Scenario 4 - HR Service rep wants to refer old conversation then click on the saved conversation in the chat history panel, please find the below screenshot below.

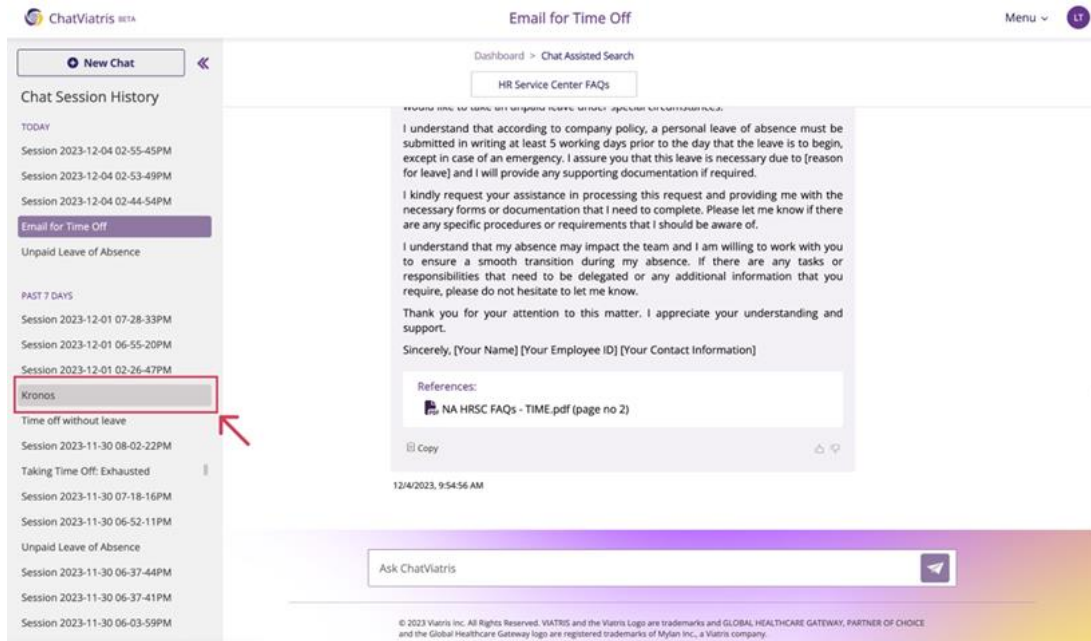


Figure 4 | Hovering Over Previous Session to Select and View

Out of Scope

Below are some of the out-of-scope features for this tool.

- The questions should be relevant. If any questions are irrelevant, this tool can provide an invalid response.
- All the Knowledge repositories are in English. If user asks questions in Spanish, response will be in Spanish. However, the reference documents are not going to be translated in Spanish.



2. User Manual for Supervised Content Creation

Supervised Content Creation - A tool that leverages Generative Artificial intelligence to help in code generation (General Domain), create Job Description(HR Domain) and Promotional email content(Brand marketing)

Accessing ChatViatriis:

1. Open your preferred web browser.
2. Enter the URL: <https://chatviatriis-pilot.azurewebsites.net/>

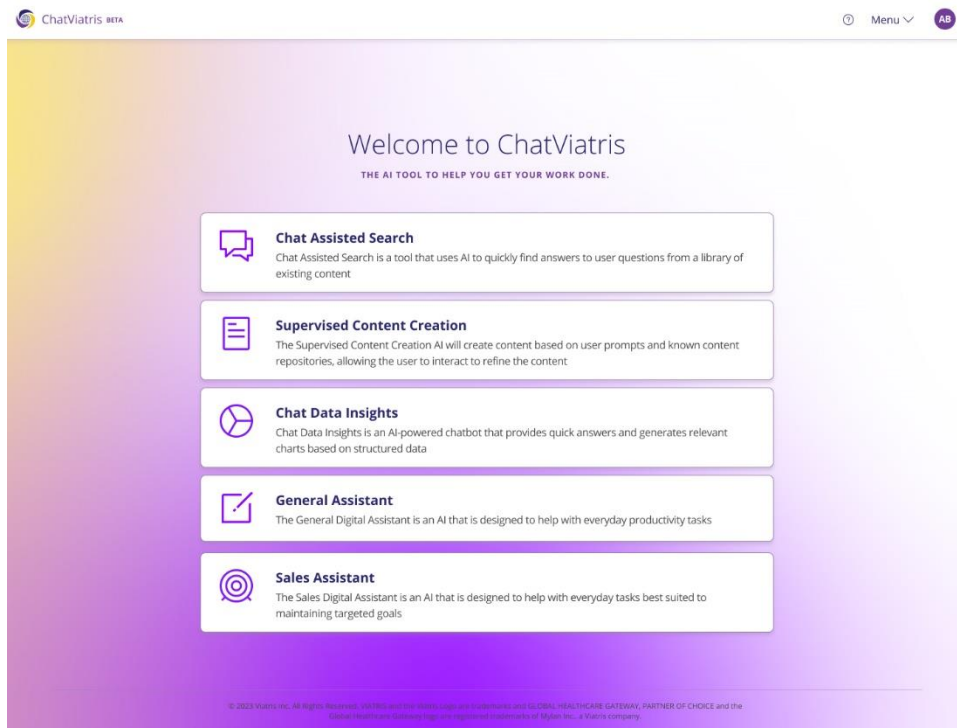


Figure 3 | Dashboard View

User Interface Overview:

- Upon accessing the URL, you will be presented with the chat interface.
- The menu drop down will show links to tools you can navigate to in ChatViatriis.
- User can select Supervised Content Creation
- The main chat window will display the space for a new conversation.
- The left panel will show you your Chat Session History

- Under the breadcrumb, a drop down will show other search instance options you have access to (Instance: HR, Global, Brand Marketing)

Starting a new chat:

There are three ways to start a chat:

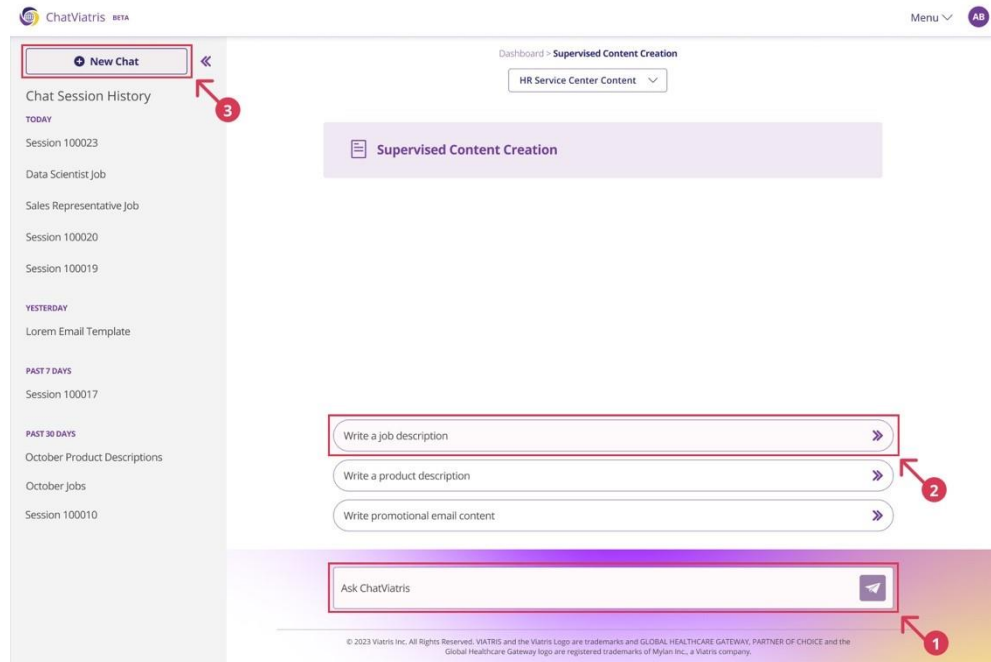


Figure 2 | Supervised Content Creation Landing showcasing three ways to start a prompt.

1. Type a question in the “Ask ChatViatriis” box.
2. Select a pre-written prompt to kick off a conversation asking that question.
3. Select the “New Chat” button in the Chat Session History panel on the left.

Use clear and specific language:

- Ask questions in a clear and specific manner to obtain accurate results.
- Good Question: "Draft an inclusive job outline detailing tasks and essential candidate criteria"
- Bad Question: "Can you give me a rough idea of what tasks and stuff we need for this job? "

Provide necessary context:

- Include any relevant context or parameters for your query.
- Good Question: "Create a job description for a customer support representative with 2 years of experience?"
- Bad Question: "Can you describe a job for someone with customer support experience?"

Provide feedback:

- Share feedback on any queries that didn't work as expected using the thumbs up/down button.

Restricted Queries:

- This AI tool won't answer the questions' about
 - Politics
 - Sports
 - Religion
 - Gambling
 - Alcohol
 - Drugs
- This AI tool won't reply to
 - Prompts for generic content creation (any topic other than job description, code and promotional content generation)

Scenario based questions for General Domain.

Below are some scenario examples to ask a series of questions in a single session?

Session 1 – User wants a SQL query to calculate the combined values of the 10 largest orders of each customer.

- Q1 - How can I calculate the combined values of the 10 largest orders of each customer. Generate SQL statement?
- Q2 - In the above report, we need to track changes in the months of April to October. Could you please write a SQL code for that?

Session 2 – User wants a sales report for second quarter of FY 2023

- Q1 - Write an SQL prompt for Sales report generation for the second quarter of FY2023?
- Q2 - Please write an SQL prompt that can be used to control access to the report generated above?

Scenario based questions for HR Domain.

Session 1 – User wants to create a job description.

- Q1 - Create job description for a regulatory associate for Australia, 2 years' experience, worked with TGA?
- Q2 – In the above request, can you change the 2 years of experience to 5 years of experience?

Session 2 – User wants to compose a job description for a software quality assurance engineer.

- Q1 – Outline the expectations and qualifications for a software quality assurance engineer role.
- Q2- For the above request, can you emphasize the proficiency in testing methodologies and automation?

Scenario based questions for Brand Marketing Domain

Session 1 – User wants to a create promotional email.

- Q1 – Can you help me create a promotional email for Norvasc?

Session 2 – User wants to a create promotional email.

- Q1 – Can you help me create a promotional email for Norvasc with respect to hypertension?

Out of scope

Promotional email: No conversation will happen as this planned for phase 2 of UAT

If user gives a prompt with drug name and disease indication, output will be generated otherwise general content is being outputted based on LLM knowledge

Phases of UAT for SSC

Phase 1 UAT : Job Description(General) and code generation(HR)

Phase 2 UAT : Promotional Email generation (Brand marketing)



3. User Manual for Chat Data Insights

Chat Data Insights - A tool that leverages artificial intelligence to rapidly locate the solutions to user queries from Viatris existing knowledge base.

Accessing ChatViatris:

1. Open your preferred web browser
2. Enter the URL: <https://chatviatris-pilot.azurewebsites.net/>

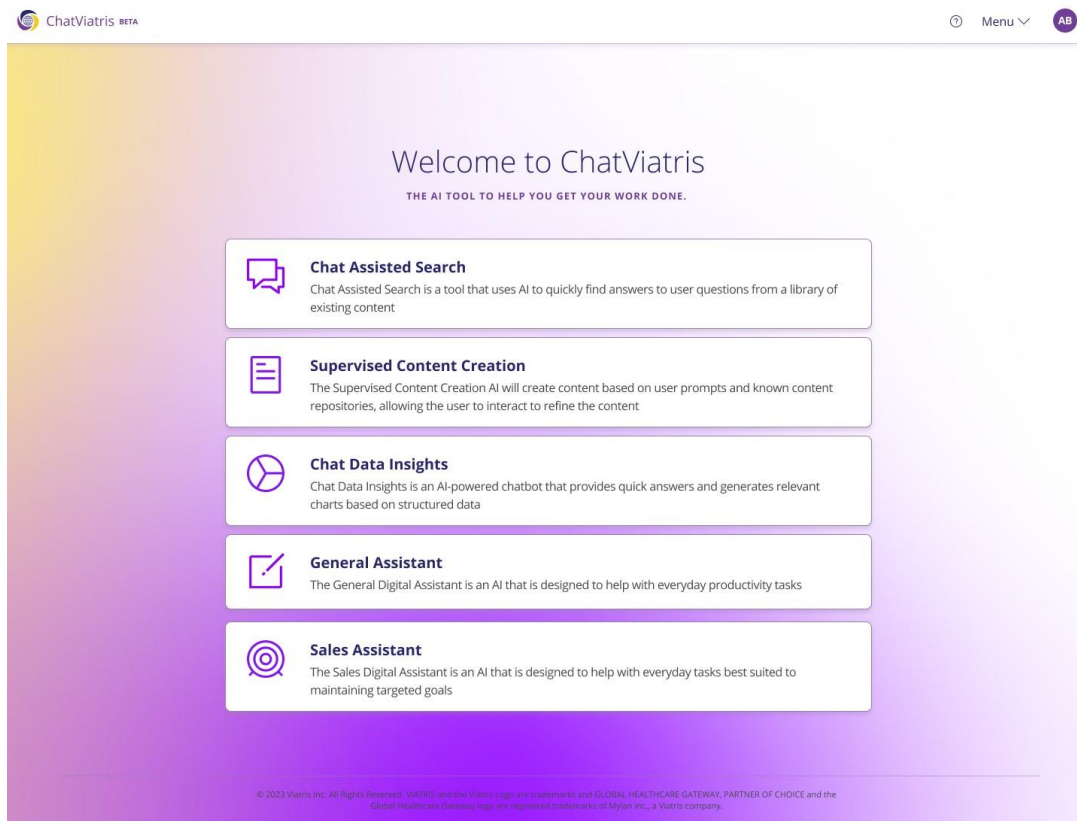


Figure 1 | Dashboard View

User Interface Overview:

- Upon accessing the URL, you will be presented with the chat interface
- The main chat window will display the space for a new conversation
- The left panel will show you your Chat Session History
- The menu drop down will show links to tools you can navigate to in ChatViatris
- Under the breadcrumb, a drop down will show other search instance options you have access to (Instance: PPM)

Starting a new chat:

There are three ways to start a chat:

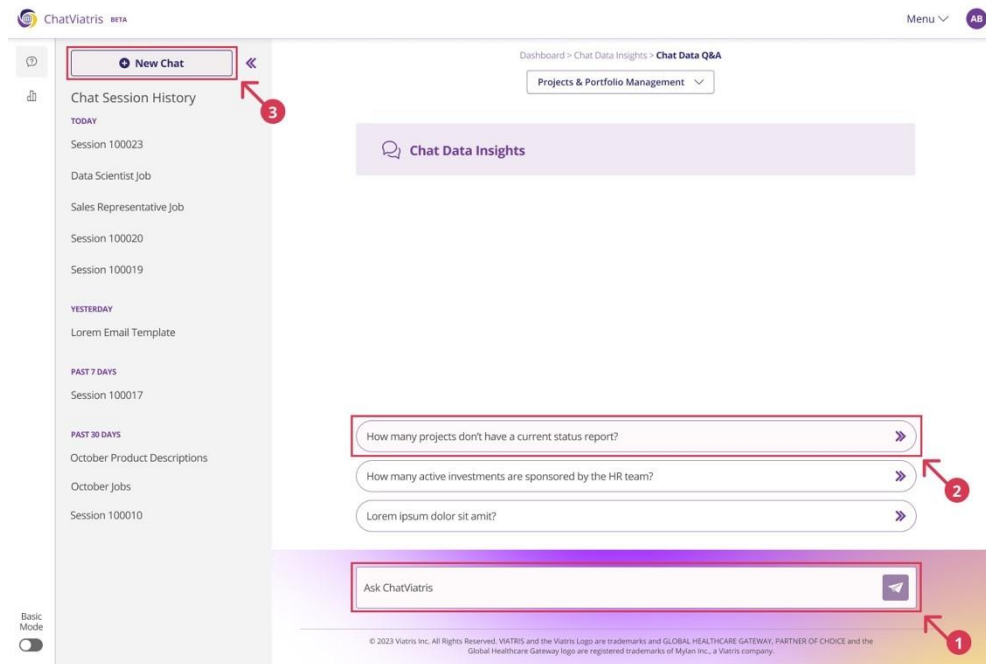


Figure 2 | Chat Data Insights Landing showcasing three ways to start a prompt

1. Type a question in the “Ask ChatViatriis” box
2. Select a pre-written prompt to kick off a conversation asking that question
3. Select the “New Chat” button in the Chat Session History panel on the left

Use clear and specific language:

- Ask questions in a clear and specific manner to obtain accurate results.
- Good Question: "What is the total hours spent by employees on the investment PRJ001800?"
- Bad Question: "How much did employees waste on investment? "

Provide necessary context:

- Include any relevant context or parameters for your query.
- Good Question: "What is the net benefit from SaaS subscriptions in the last quarter (July 2023 to Sep 2023)?"
- Bad Question: "What is the net benefit from SaaS subscriptions in the last quarter?"

Specify the level of aggregation:

- Include the desired level of aggregation in your question.
- Good Question: "For the latest transaction in each project, how many cases have the actual capital greater than the budgeted by 10%?"
- Bad Question: "How many cases have actual capital greater than budgeted by 10%? "

Provide feedback:

- Share feedback on any queries that didn't work as expected using the thumbs up/down button

Restricted Queries:

- The tool is restricted to answer only questions that are related to the data/schema, please find the details of the schema in the below section
- The tool covers Q&A, charts on the data. It does not solve AI problems like forecasting, regression, etc.,

About the Schema/data:

- **Table/View:** BenefitPlanDetailsRollup
 - Description: Captures the benefit details. If the value is negative, it means we got some benefits (reductions) in our project/investment expenses
 - Primary key: InvestmentID, StartDate
- **Table/View:** ExpectedActualsVsActuals
 - Description: Investment expenses at a high level. Captures Actual cost vs Estimated actual cost across - capital, op-ex and one-time expenses
 - Primary key: InvestmentID, TransactionPeriod
- **Table/View:** InvestmentFinancialsModel
 - Description: Investment expenses and financial modelling output on cost. Captures Forecast, budget, actual, estimated actual cost and variance.
 - Primary key: InvestmentID, TransactionPeriod
- **Table/View:** InvestmentList
 - Description: Investment details. Investment/project name, whether they are active portfolio or not, approval status, project manager, sponsoring business function and OBS, SR status, etc
 - Primary key: InvestmentID
- **Table/View:** InvestmentListAdditionalAttributes
 - Description: Additional details on the investments/projects
 - Primary key: InvestmentID
- **Table/View:** MergedTargetOfRecordRollup
 - Description: This view shows what the financials were for a project at the time targets were set vs. current financials; Similar to the view ExpectedActualsVsActuals except it also includes future months whereas ExpectedActualsVsActuals only includes completed months
 - Primary key: InvestmentID, TransactionPeriod
- **Table/View:** PPMData_InvestmentFinancialsModel_Snapshots
 - Description: Investment expenses and financial modelling output on cost. Captures Forecast, budget, actual, estimated actual cost and variance. This represents a series of point in time snapshots of the investment financials model so we can see how forecasts changed over time
 - Primary key: InvestmentID, SnapshotDate, TransactionPeriod
- **Table/View:** TimeSheetPivot
 - Description: Timesheet to capture employees' effort across investments
 - Primary key: Email, project_ID, Project_Name, Task_Name, tsDate

Scenario based questions for PPM

Below are some scenario examples to ask series of questions in a single session.

Session 1 - An executive/SPOC wants some high-level insights on a specific department

- Q1 - How many active investments are sponsored by the HR team?

- Q2 - Out of those investments how many have SR status as on track?

Session 2 - An executive wants some high-level insights on the overall Investments and how they are progressing

- Q1 - What is the distribution of investment types across different project approval statuses? Give me a visual for this. Just for the investment type idea?
- Q2 - What is the net benefit from SaaS subscriptions in the last quarter (June to Aug 2023)?
- Q3 - For the latest transaction in each project, how many cases have the actual capital greater than the budgeted by 10%?

Out of Scope

Below are some of the out-of-scope features for this tool.

- Advanced user option is available in the next phase of UAT which includes Data upload, modeling and integrated query. In this 1st phase of UAT user will be able to test Chat, discover and data insight modules



4. User Manual for General Digital Assistant

General Digital Assistant - A tool that streamlines your workflow by summarizing meeting notes and providing comprehensive research assistance.

Accessing ChatViatris:

1. Open your preferred web browser.
2. Enter the URL: <https://chatviatris-pilot.azurewebsites.net/>

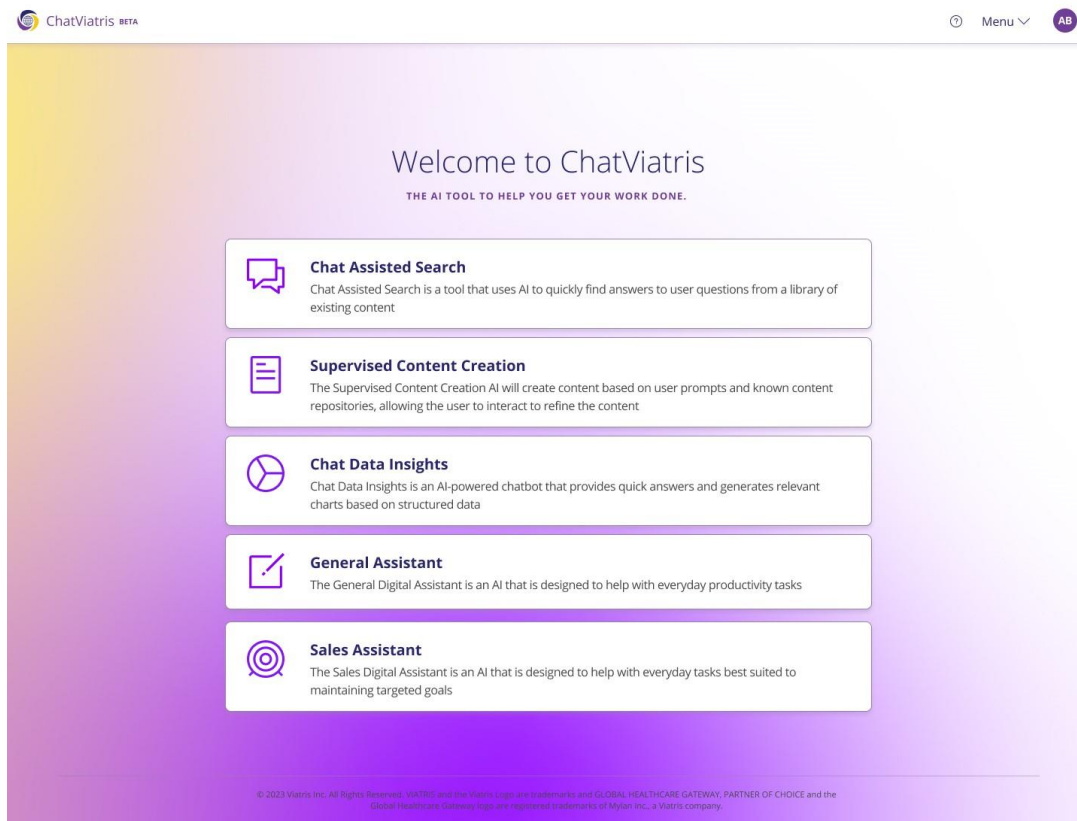


Figure 1 | Dashboard View

User Interface Overview:

- Upon accessing the URL, you will be presented with the chat interface.
- The menu drop down will show links to tools you can navigate to in ChatViatris.
- User can select General Assistant tool.
- The main chat window will display the space for a new conversation.

- The left panel will show you your Chat Session History
- Under the breadcrumb, a drop down will show other search instance options you have access to (Instance: General)

Starting a new chat:

There are three ways to start a chat:

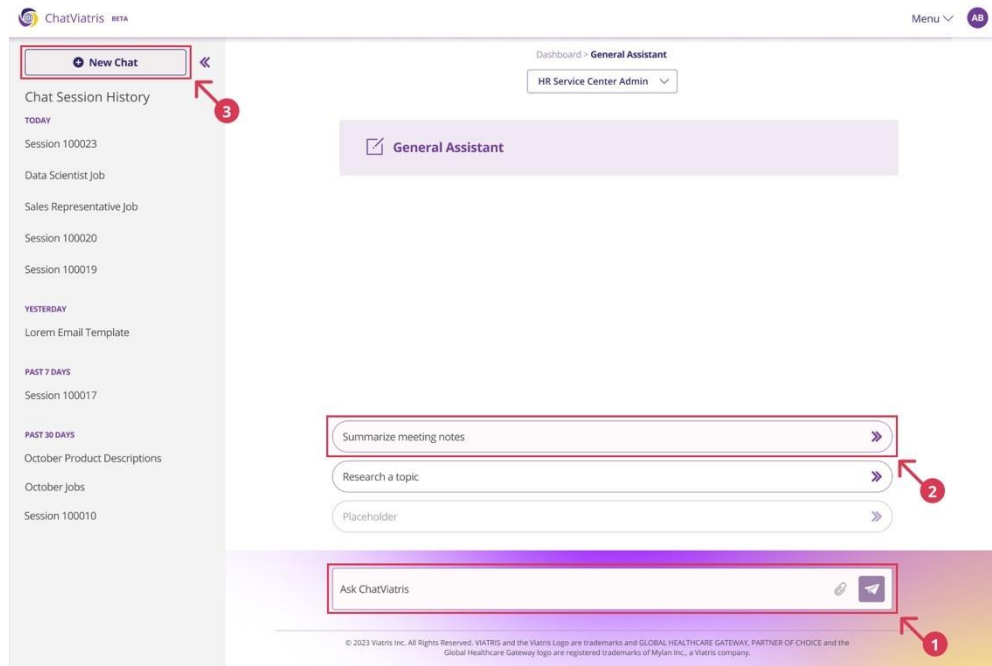


Figure 2 | Digital Assistant Landing showcasing three ways to start a prompt.

1. Type a question in the “Ask ChatViatris” box.
2. Select a pre-written prompt to kick off a conversation asking that question.
3. Select the “New Chat” button in the Chat Session History panel on the left.

Use clear and specific language:

- Ask questions in a clear and specific manner to obtain accurate results.
- Ask any follow up questions if needed.
- Good Question: "Can you extract meeting reminders from uploaded meeting notes?"
- Bad Question: "Remind me? "

Provide necessary context:

- Include any relevant context or parameters for your query.
- Good Question: " Can you please summarize the uploaded meeting notes?"
- Bad Question: "Summarize "

Provide feedback:

- Share feedback on any queries that worked/didn't work as expected using the thumbs up/down button.

Restricted Queries:

- This tool won't answer the questions' about
 - Politics
 - Sports
 - Religion
 - Gambling
 - Alcohol
 - Drugs

Scenario based questions for uploaded documents.

Below are some scenario examples to ask series of questions in a single session.

Scenario 1 - Session 1 – User wants to find a summary of the uploaded meeting notes, followed by extracting reminders and follow-up tasks mentioned within the meetings.

- Q1 - Can you please summarize the uploaded meeting notes?
- Q2 - Can you extract reminders and follow-up from uploaded meeting notes?

Scenario 2 - Session 2 – User wants to Question Answer over any uploaded generic documents.

- Q1 - Summarize the uploaded document in 200 words?
- Q2 – What are the side effects of Lipitor mentioned in the documents?

Scenario 3 - User wants to research on some recent topics.

- List down few medicine that Viatris launched in 2023.

Scenario 4 - User wants to refer old conversation then click on the saved conversation in the chat history panel, please find the below screenshot below.

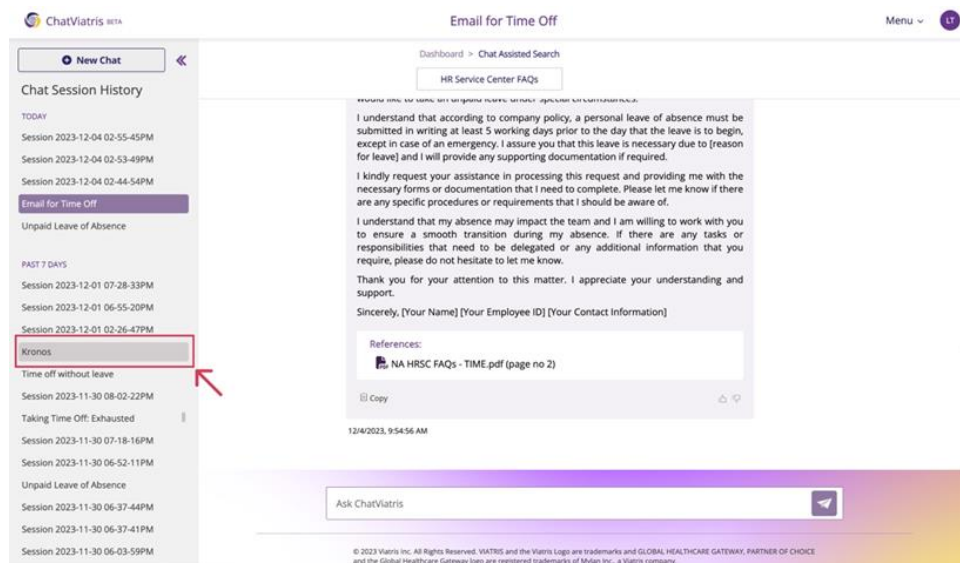


Figure 3 | Hovering Over Previous Session to Select and View

Out of Scope

Below are some of the out-of-scope features for this tool.

- The questions should be relevant. If any questions are irrelevant, this tool can provide an invalid response.
- User should ask the question in English. Application cannot handle any other language.
- If upload size exceeds '2MB', an error message will be shown.
- The capability to schedule meeting/reminders in Outlook/Teams (which appears at the bottom of some answers) are placeholder and does not have functionality attached to it.
- The question should be related to the content of the uploaded document. For any other topic, the general research tool will be invoked.
- If you have asked a general question and would like an answer specific to the prior uploaded document, please refer to it as "as per the uploaded document" after your question.
- Please adhere to the good question writing practices for optimal results.



5. User Manual for Sales Assistant

Sales Assistant - A tool that leverages Generative Artificial intelligence to help sales representatives in maintaining and achieving targeted calls by generating call plans and key conversation topics.

Accessing ChatViatris:

1. Open your preferred web browser
2. Enter the URL: <https://chatviatris-pilot.azurewebsites.net/>

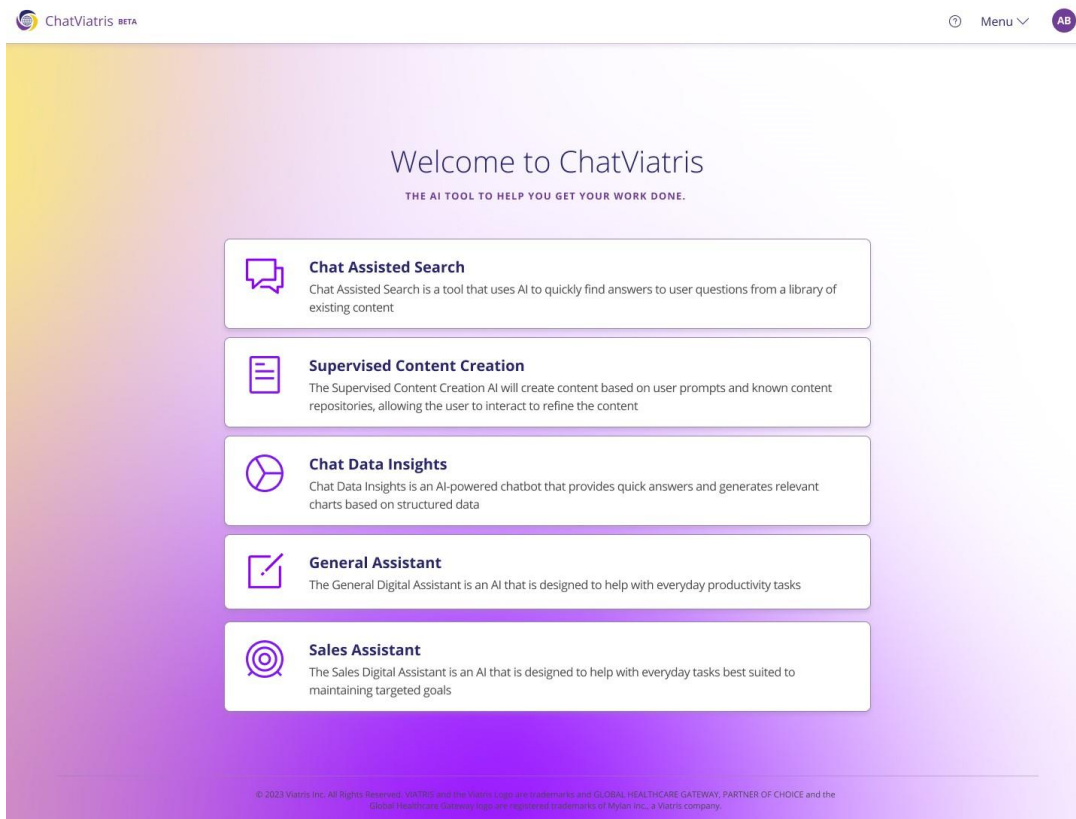


Figure 1 | Dashboard View

User Interface Overview:

- Upon accessing the URL, you will be presented with the chat interface.

- The menu drop down will show links to tools you can navigate to in ChatViatris.
- User can select Sales Assistant tool.
- The main chat window will display the space for a new conversation.
- The left panel will show you your Chat Session History
- Under the breadcrumb, a drop down will show other search instance options you have access to (Instance: Sales)

Starting a new chat:

There are three ways to start a chat:

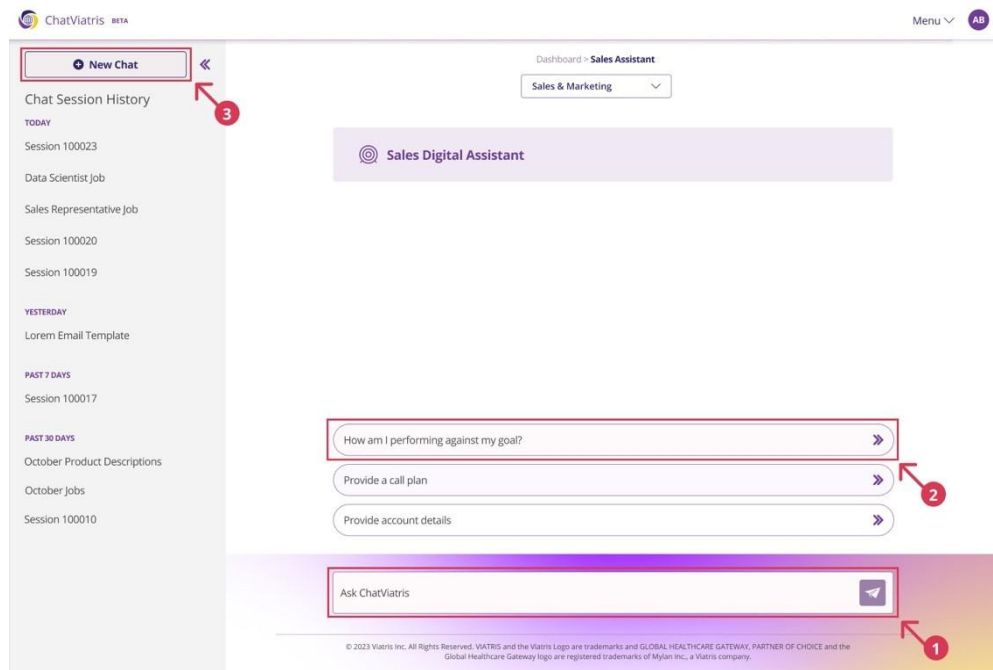


Figure | Digital Assistant Landing showcasing three ways to start a prompt

1. Type a question in the “Ask ChatViatris” box.
2. Select a pre-written prompt to kick off a conversation asking that question.
3. Select the “New Chat” button in the Chat Session History panel on the left.

Use clear and specific language:

- Ask questions in a clear and specific manner to obtain accurate results.
- Good Question: "How I am performing against my goal?"
- Bad Question: "How I am doing "

Provide necessary context:

- Include any relevant context or parameters for your query.
- Good Question: "I have a meeting scheduled with Doctor Samuel Owens in next week, can you please create speaking notes for the discussion?"
- Bad Question: "Can you create speaking notes for Samuel Owens"

Specify the level of aggregation:

- Include the desired level of aggregation in your question.
- Good Question: " Give me number of prescriptions written by All doctor's belongs to my territory for each product? "
- Bad Question: "How many prescriptions written by all doctors in my territory? "

Provide feedback:

- Share feedback on any queries that didn't work as expected using the thumbs up/down button.

Restricted Queries:

- The tool is restricted to answer only questions that are related to the data/schema, please find the details of the schema in the below section.
- The tool has been trained to give answer any question belongs to me(As a User) or any doctor that belongs to my territory.

About the Schema/data:

- **Table/View:** HCP
 - Description: Captures the basic details of health care provider like Name, Priority, contact details and Territory in which they are working
 - Primary key: HCP_ID
- **Table/View:** SalesRep
 - Description: Captures the basic details of Sales representative like Name, contact details and Territory in which they are working
 - Primary key: SalesRep_ID
- **Table/View:** PriorityLookup
 - Description: Captures the Priority of HCP. How many times in a quarter Sales Rep need to connect with HCP.
 - Primary key: Priority
- **Table/View:** InteractionHistory
 - Description: Captures the past interaction information between sales representative and HCP like when the contact happened, call purpose, opportunities
 - Primary key: History_ID
- **Table/View:** Prescription
 - Description: Captures what kind of product doctor is prescribing and of which company. This also capture the total number of prescription and new prescription written by the doctor on specific date.
 - Primary key: HCP ID, Prescription_date

About the Unstructured data:

Apart from the above structure data, Sales Assistant is also utilizing the previous meeting notes of Sales rep to prepare the speaking notes and email draft. If there are no previous notes available for any doctor, tool use doctor's prescription behavior in preparing a speaking note or drafting an email.

Scenario based questions

Below are some scenario examples to ask series of questions in a single session.

- **Scenario 1 -**

- **Sales Rep wants to track and monitor his call performance.**

Q1 - How am I performing against my goal?

- **After looking into his performance, Sales Rep wants to know about his call plan for next week plan.**

Q2 – Can you please create a call plan for my next week meetings?

- **As per the call plan sales rep select one doctor and want to know more about him.**

Q2 – Can you please Tell me more about Doctor Samuel Owens

- **Sales Rep decided to meet with doctor and want to know what he should discussed with him based on his previous meeting details.**

Can you please create speaking notes for my next week meeting with Doctor Samuel Owens

- **Instead of meeting him personally sales rep wants to drop an email to the doctor.**

Can you please draft an email to Doctor Samuel Owens

- **Scenario 2 - User wants to refer old conversation then click on the saved conversation in the chat history panel, please find the below screenshot below.**

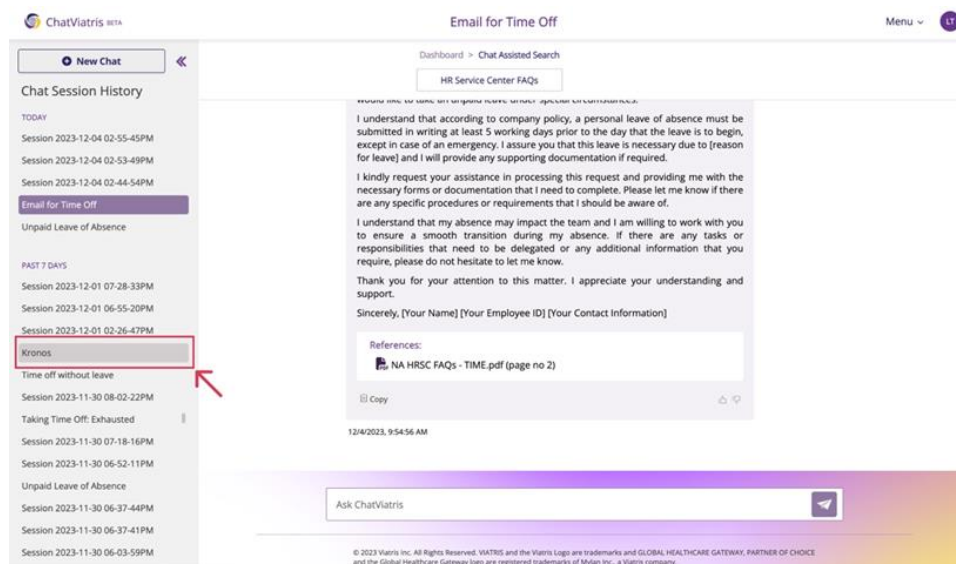


Figure 4 | Hovering Over Previous Session to Select and View

In case of any queries during the business hours please contact

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lindsay.turley@viatris.com

nigel.clinton@viatris.com