Application Administrator's Guide

Release 5.5.1

Model N

THE LEADER IN REVENUE MANAGEMENT

Document Revised: December 9, 2010

Contact Model N
Model N
1800 Bridge Parkway
Redwood City, CA 94065

Phone: (650) 610 - 4600
FAX: (650) 610 - 4699

www.modeln.com

Table of Contents

List of Figures and Codes

List of Tables

1 About This Guide

This administrator's guide provides step-by-step instructions to guide you through the tasks involved in configuring the Model N system after installation.

1.1 Audience

This guide is intended for the following audiences:

- Application administrators with knowledge of the business process.
- Model N Professional Services representatives who are planning the implementation and customization of your Model N system.

1.1.1 Basic Assumptions

This guides assumes familiarity with the following:

- Practical knowledge of Java.
- Installing and configuring application servers.
- Installing and configuring database servers.

1.2 Documentation Conventions

The following table describes the conventions used in this guide.

Table 1-1: Documentation Conventions

Conventions	Descriptions
File names and code objects	Names of files and code objects are in `Courier New` font style.
Line breaks in code	Some code examples may contain lines which are longer than can be displayed on the width of a page. Lines which have been broken for page formatting reasons will be indicated with the pilcrow (¶) symbol. Warning: Do not separate these lines during actual configuration because doing so may cause the application to fail to initialize correctly.
Field and dialog box names	Names of fields and dialog boxes are first letter (of each word) capitalized, with no other special formatting. For example: • Information in the Customer ID field must be valid. • Information in the External Data dialog box is read-only.
User input	User input is in **bold** type, whether the input is typed or selected from a menu, or a button or similar element is clicked on a page. For example: • Type **Exit**, and then press **Enter**. • On the **File** menu, click **Save**. • On the tool bar, select **Edit > Preferences**.
Navigation Paths	Each application page description begins with a navigation path written in **bold**. For example: Navigation Path: **Sales Folders > Indirect Sales > Submission # > Lines**
Lifecycle statuses	The lifecycle statuses are in `Courier New` font style. For example: Users cannot override the `Ignore` status or the `Fatal` severity level.

Table 1-1: Documentation Conventions (Continued)

<table>
<tr><th>Conventions</th><th>Descriptions</th></tr>
<tr><td>Application page descriptions.</td><td>The application pages are described at the field level, for example

Table 1-2: Field Level Descriptions and Examples
<table>
<tr><th>Name</th><th>Type</th><th>Description</th></tr>
<tr><td>The field name as it shows in the application page.

The required fields display an asterisk in this column.</td><td>The field types can be:
String
Text Box
Check Box
Chooser Button
Drop-Down List
Multi-Select List
Chooser
Date Selector
Date Range Selector
Link</td><td>This column describes the specific functional requirements that apply to this field, and how to use it.</td></tr>
<tr><td>Example:

Contract Start Date *</td><td>Example:

Date Selector</td><td>Example:

Describes the payment schedule. Select the start date for the contract.</td></tr>
</table></td></tr>
<tr><td>System outputs</td><td>System outputs, such as confirmation messages or alerts, are first letter capitalized. For example:

The system displays the following message: Do you want to save your changes before moving on?</td></tr>
<tr><td>Referenced topics</td><td>Referenced topic headings are in blue and underlined. For example:

See <u>Documentation Conventions</u> for more information.</td></tr>
<tr><td>Referenced guides/ documents</td><td>Referenced guide or document titles are in italics. For example:

See Medicaid Developer's Guide for more information.</td></tr>
</table>

Table 1-1: Documentation Conventions (Continued)

Conventions	Descriptions
Notes	Notes are contained within two horizontal lines. For example: **Note:** This is a note.
Blank pages	There will be a blank page with header and footer at the end of the chapters ending on odd page numbers. This format is designed to accommodate printing multiple chapters on duplex paper and keeping the collation even.

1.3 Related Documents/Resources

You can access the documentation from our Model N Customer Portal at http://customers.modeln.com.

The following related documents are available:

- *Installation and Migration Guide*
- *Operations Guide*

1.4 Feedback

Model N welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to us in the following ways:

- E-mail: techdocs@modeln.com
- FAX: (650) 610 - 4699. Attn: Product Documentation
- Postal service:

  Model N
  Product Documentation
  1800 Bridge Parkway
  Redwood City, CA 94065

At Model N, we are dedicated to improving the technical documentation. We are not able to reply to your comments individually, but we use your advice to improve our services.

2 Introduction

When implementing the Model N application suite, an application administrator should be designated to handle the common tasks of maintaining:

- users and groups
- roles and access controls
- organizations
- print templates and contract terms

2.1 Administration Tasks

The *Application Administrator's Guide* should be used as a reference for common administration tasks. The following sections provide an overview of areas covered in this document.

Users, Roles, and Access Controls

A user ID must be created for access to the Model N system; whether or not all users are assigned to a group is optional.

Roles are a set of access rule definitions (access controls). These roles are usually defined to match business roles within an organization so that all users with a similar job have the same permissions within the Model N system.

Organizations

Organizations can be defined to match the corporate structure of your company. By creating organizations on the basis of region, business unit, or any other logical unit of separation, you can control visibility to data based on those organizations.

Print Templates and Contract Terms

Print templates are starting points to expedite the process of creating contracts in cases where similar offers are repeatedly offered to customers. Contract terms store the legally binding terms and conditions that apply to the entire contractual agreement.

3 Users, Roles, and Access Controls

This section of the document covers the management of users and groups, roles, and access controls.

3.1 Users and Groups

A *user* is a community member of the Model N system that can be authenticated. A *user group* is a collection of users.

The system administrator can create a new user profile with an automatically generated user ID. The following steps outline how to add a new user profile.

3.1.1 How to Create a User Profile

1. Go to the Profile Page: **Administration > Users and Organizations > Users**.
2. On the left, under **Administration Tasks**, click **New user**.
3. From the **Type** drop-down list, select `User`.
4. In the **First Name** and **Last Name** fields, enter the new user's first and last names.
5. In the **Location** field, enter the correct group in which to locate this user.

6. Select a default organization for this user. If you are editing an existing user, the available organizations are limited to the user's editable organizations.
7. In the upper-right corner of the page, click **Finish**.
8. In the **ID** field, replace the number with the correct user name, such as `jsmith`.
9. On the left, under **User Tasks**, click **Save**.

Next, you must set up roles and a password. See How to Set Up a Password and Other User Settings.

3.1.2 How to Set Up a Password and Other User Settings

The system administrator can change the automatically generated login ID to establish specific application access and security before activating the account and notifying the user. The following steps outline how to change the login ID.

1. Create the new user profile. See How to Create a User Profile.
2. On the left, under **User**, click **Roles**.
3. Under **Available Roles**, select the roles that you want the new user to be a member of.
4. On the left, under **User**, click **Preferences**. Note that the system automatically assigned a password, which is disguised using asterisks.
5. Set the **Default Organization**, **Time Zone** and **Locale**, if this functionality is used in your installation of the Model N system.
6. On the left, under **User Tasks**, click **Activate Account**.
7. In the **New Password** and **Re-type New Password** fields, enter a password and click **OK**.
8. On the left, under **User Tasks**, click **Save**.
9. Optionally, you may configure **Alerts**, **Contacts**, and **Customer Alignment** for this user.
10. Click **Logout** on the **File** menu to log out of Model N.

You can now change the user name and password. See How to Change a User Password.

3.1.3 How to Change a User Password

The Model N system requires that you change your password the first time you log in. The following steps outline how to change your password.

1. On the Model N login page, in the **User** field, enter your new user ID.
2. In the **New Password** and **Confirm New Password** fields, enter a new password.
3. Click **Change Password** to log in to Model N. Your password changes to the new password and the Model N application suite opens.

3.1.4 How to Create a Group

1. Go to the Profile Page: **Administration > Users and Organizations > Users**.
2. On the left, under **Administration Tasks**, click **New user**.

3. From the **Type** drop-down list, select `Group`.
4. In the **Group Name** field, enter the new group name.
5. In the **Location** field, enter the correct group in which to locate this group.
6. Optionally, associate this group with an organization.
7. In the upper-right corner of the page, click **Finish**.
8. In the **ID** field, replace the number with the correct group name, such as `admins`.
9. On the left, under **User Tasks**, click **Save**.

Next, you must associate the members to the group. See How to Add Users and Groups to Groups.

3.1.5 How to Add Users and Groups to Groups

1. Either create a new group as described in How to Create a Group or open an existing group from **Administration > Users and Organizations > Users**.
2. On the left, under **User**, click **Users and Groups**.
3. Click **Add**. The Select Users or Groups dialog box opens.
4. Select the user or group to add and click **OK**.
5. On the left, under **User Tasks**, click **Save**.

3.1.6 How to Add Parent Groups

1. Either create a new group as described in How to Create a Group or open an existing group from **Administration > Users and Organizations > Users**.
2. On the left, under **User**, click **Parent Groups**.
3. Click **Add**. The Select User Group dialog box opens.
4. Select the user group to add and click **OK**.
5. On the left, under **User Tasks**, click **Save**.

3.1.7 How to Export Users and Groups

1. Go to the Profile Page: **Administration > Users and Organizations > Users**.
2. If necessary, perform a search to find the users you wish to export and set **Page Size** to a value to display the results.
3. Click **Export**. The Export dialog box opens.
4. Enter a file name for the exported results, select a file type, and click **OK**. You are prompted to open or save the file.
5. Click **Save** and set the location to save the file.

3.2 Role Management

A *role* is a collection of access controls (resources and actions). A role does not own other role groups or roles, but is associated with users, user groups, and resources. Users and user groups can be associated with multiple roles.

A *role group* is a collection of roles or role groups. The system has one role group in the root (Roles) that cannot be deleted. Role groups cannot be associated with resources.

3.2.1 Default User and Role

By default, the Model N system has a user, *Administrator*, and the system administrator role, *sadmin*, defined, neither of which can be deleted. The *Administrator* user is associated with the system administrator role and that association cannot be removed. The system administrator role has write access to every resource in the application and these rights can not be revoked.

Note: Additional users can be associated to the system administrator role.

3.2.2 How to Create a New Role

1. Go to the Roles Page: **Administration > Users and Organizations > Roles**.
2. On the left, under **Administration Tasks**, click **New role**.
3. From the **Type** drop-down list, select `Role`.
4. Enter a name for the role in the **Name** field.
5. In the **Display Name** field, enter a user-friendly name. This is the name that will be visible in the system.
6. Click the **Role Group** browse button to select the role group you want to associate this role with from the Select a Group dialog box.
7. In the upper-right corner of the page, click **Finish**.
8. On the left, under **Role Tasks**, click **Save**.

You can now associate users with this role. See How to Associate a User with a Role.

3.2.2.1 How To Create a New Role Based on an Existing Role

1. Go to the Roles Page: **Administration > Users and Organizations > Roles**.
2. Select the check box next to the role you wish to copy and click **Copy**. A new role is created with *-COPY* appended to the name of the role that was copied.

3.2.3 How to Associate a User with a Role

1. Either create a new role as described in How to Create a New Role or open an existing role from **Administration > Users and Organizations > Roles**.
2. On the left, under **Role**, click **Users and Groups**.
3. Click **Add**. The Select a Staff Member dialog box opens.
4. Select the user or group to add and click **OK**.

5. On the left, under **Role Tasks**, click **Save**.

3.2.4 How to Export and Import Role and Resource Associations

Exporting and importing roles and their associated resources lets you migrate information from a test environment to your production environment.

3.2.4.1 How To Export Roles

1. Go to the Roles Page: **Administration > Users and Organizations > Roles**.
2. Click the **Export roles** task. The File Download dialog box opens.
3. Click **Save**.
4. Enter a file name and the location where the file should be saved, then click **Save**.

Note: The **Export** button on the toolbar exports only the results of a search.

3.2.4.2 How To Import Roles

1. Go to the Roles Page: **Administration > Users and Organizations > Roles**.
2. On the left, click the **Import roles** task. The Upload Role and Access Rule dialog box opens.
3. Enter the file name of a .csv file and click **OK**.

3.3 Access Control

Access control is a set of back-end access rule definitions that allow or prevent user roles from interacting with the various parts of the application. The rules are defined as:

- the role to which the rule applies
- the name of the action
- the resource path
- the rule type

where *resources* are the UI elements of application functional areas and organized hierarchically and *actions* are the type of access to a resource.

Some things to note:

- Only one user can edit configuration at a time. All other users will have read-only access.
- Users will have to log in again before they will see access control changes.
- Access control rules will not automatically reflect component name changes. If a component that has already been configured for access control is renamed or moved, a security hole may be created. Application developers must write a migration task if they rename or move any previously deployed components.

3.3.1 How to Define Access Control Rules

To create a new access rule for a role:

1. Log in as an administrator.
2. Go to the Access Rules Page for a role: **Administration > Users and Organizations > Roles >** *Name* link **> Access Rules.**
3. Click **Add**. The Add Rule dialog box opens.
4. Select the **Resource**, **Action**, and **Rule** to apply and click **OK**.
   The resources are described on the Access Rules page. The following tables describe the actions and rules available.

Table 3-1: Access Control Actions

Action	Description
Act--As	Action used during Document Routing -- determines permission for approving/rejecting a document on behalf of another user.
Any	Special action denoting all possible actions. The log manager gives special treatment to this action when it is used either in the log manager initialization XML file, or as an argument to the methods for configuring the log manager output matrix. The access control system gives special treatment to access rules with this action. In particular, when a judgement is made about a particular action like `{@link #VIEW VIEW}`, if no access rules with that action apply, the access control system next looks for an access rule with the `ANY` action; if such rules exist, they govern the access.
Approve	Determines permission for approvals.
Browse	Determines permission for browsing.
Cancel	Determines permission for cancelling.
Create	Determines permission for object creation.
Delete	Determines permission for deleting objects.
Download	Determined permission to download.
Invoke	Determines permission to execute data flows, web services, or the UI.
Modify	Determines permission to modify the resource.

Table 3-1: Access Control Actions (Continued)

Action	Description
No	Special action denoting no action. The log manager gives special treatment to this action when it is used either in the log manager initialization XML file, or as an argument to the methods for configuring the log manager output matrix.
Print	Determines printing permission.
Publish	Action for use by Publishers/Readers.
Reject	Determines permission for rejections.
Run	Used in Reporting. Indicates the action of running a report and generating result.
Save	Used in Reporting. Indicates the ability to make changes and save a report template.
Save-As	Used in Reporting. Indicates the action of saving a report template as another.
Schedule	Action for use by Reporting Framework for schedulable reports. This would correspond to a permission for a community member to “schedule” reports.
Search	Determines permission to search.
Test	Action for use in test programs.
Update	Determines permission to update objects.
Upload	Determines permission to upload objects.
View	Determines permission to view objects.

Table 3-2: Access Control Rules

Action	Description
allow	Explicitly defines the specified action as available to the role.
deny	Explicitly defines the specified action as not available to the role.

3.3.2 How to Export Access Rules

1. Go to the Access Rules Page: **Administration > Users and Organizations > Roles > Name** link **> Access Rules**.
2. If necessary, set the Page Size to a value to contain all search results.
3. Click **Export** on the Roles tool bar. The Export dialog box opens.
4. Enter a file name and file type for the exported data and click **OK**. You are prompted to open or save the file.
5. Click **Save** and set the location where the file should be saved.

4 Organizations

This section of the document describes organizations and multi-organization (multi-org) support.

The organization hierarchy represents the corporate structure of the manufacturer as represented in their internal systems. These organizations may be defined by region, by business unit, or on the basis of any other logical unit of separation.

In a multi-organization environment, an organization hierarchy provides visibility of data across organizations when that hierarchy reflects the divisions between organizations.

4.1 Organization Implementation

You can configure the Model N system to be a single organization or multi-organization environment. Only a system administrator can access the organization management functionality.

In a single organization environment, the application is organization agnostic, meaning that data is available to the entire organization. Out of the box, the Model N system comes with one organization, the *root* organization. This root org is marked as the sales organization by default.

In a multi-organization environment, organization associations let you create divisions within your organization and define the data visibility of those organizations.

Note: The Management Console, Performance Console, and Configuration Console are all organization agnostic, which allows IT administrators to see all data records within the consoles independent of the organizations to which they belong.

4.1.1 Organization Awareness

The following components are organization-aware or take organizations into account in some way:

- **Community**: Community members can be associated with multiple organizations. All community members other than customers also inherit organization associations through their community hierarchy. Users and user groups inherit org associations from their parent user groups, while territories inherit from territories higher up in their hierarchy.
- **Product Catalog:** See the application specific user guides for additional details.
- **Data flow runs:** The organization for which you are running the data flow must be specified.
- **Business objects:** Objects can be made organization aware, with different values set per organization.

4.1.2 Sales Organization

When an organization is created, it can be designated as a sales organization. A "sales organization" is an SAP term used to define a "selling unit" in the legal sense. In general terms, a sales organization is an organization unit that can sell and distribute goods and conduct business transactions with customers.

Note: While setting up the org hierarchy, you can choose to mark other orgs as sales orgs. Since there can only be one sales organization in a given organization branch, any previously existing sales organizations in the given organization hierarchy should be un-marked as sales organizations first.

4.1.3 Organization Hierarchy

Organization hierarchy provides the ability to define the corporate structure of the user and to set visibility and editability rules based on that structure. See Organization-based Data Visibility for more information.

4.1.4 Setting up a Multi-Organization Environment

You should configure your organization structure right after installation. Otherwise, your data may not correctly line up with your organization hierarchy.

Note: Once you have defined multiple organizations, you cannot revert to a single organization.

4.2 Organization-based Data Visibility

The organization hierarchy provides a means to associate data with users. The rule that governs the data visibility is:

> *A given user may access a given data element if and only if the organizations associated with that user overlap with the organizations associated with that piece of data.*

For example, if a customer is in Germany, that customer would be associated with the German organization. Only users associated with the German organization would have access to this contract. If the organizations associated with the customer overlap with the organizations associated with the user, then access is allowed.

In more complex cases, there may be multiple organization sets that must be compared with the user organization set to look for an overlap. For example, a chargeback line is tied to a specific product, customer, and wholesaler. The set of organizations associated to a particular user must overlap with each of the sets of organizations associated with the product, customer, and wholesaler.

4.2.1 Data Editability

While a data object is visible if there is an overlap between the set of associated organizations (including all descendant organizations) of that object and the set of associated organizations of the user, a data object is editable if there is any overlap between the set of associated organizations, *not including descendant organizations,* and the set of associated organizations for the user.

For example, a contract associated with the Europe organization should be viewable to the French users, but they should not be allowed to edit it because it is outside their organizational scope.

4.3 Organization–Data Association

All organization–data associations fall into one of the following categories:

- community–based (between a node in the community and an organization)
- catalog–based (between a node in the catalog and an organization)
- general (between arbitrary objects, such as approval routes and an organization)

Note: Any unassociated data is accessible to all organizations and can be edited by all organizations.

4.3.1 Community-based Associations

Community-based associations tie a node within an organization to another entity in the community through specific community edges in much the same way that territory alignment is structured.

4.3.1.1 User–Organization Association

Users or groups of users may be associated with any number of organizations. The visibility rule to define the set of organizations associated with that user is:

> *All organizations that are directly associated with a given user (or user group) or that have an ancestor that is directly associated with that user (or user group)*

It is valid to have associations from a single user or user group node to multiple organizations. The set of associated organizations is the union of all descendent nodes from the multiple directly associated organizations.

The editability rule to define the set of organizations associated with that user is:

> *All organizations that are directly associated with a given user (or user group).*

Unassociated Users

Users and groups do not need to be associated to an organization

4.3.1.2 Customer–Organization Association

As with users, customers may be aligned to any number of organizations. Customers can only be associated with organization nodes that are marked as “sales organizations”. The sales organization designation indicates that this node logically is associated with a selling unit. In SAP, this would correspond to the Sales Organization. In Oracle, this would correspond to the Operating Unit.

Unassociated Customers

Customers do not need to be associated with an organization. The membership and legal entity hierarchy is not affected by the association of the customer. For example, if a company is marked as an unassociated customer, then this does not mean that the members of that company are automatically unassociated. Each customer has their own organization association.

4.3.1.3 Territory–Organization Association

Territories use the same rules as users. The set of associated organizations for visibility is:

> *All organizations that are directly associated with a given territory or that have an ancestor that is directly associated with that territory.*

The set of associated organizations for editability is:

> *All organizations that are directly associated with a given territory.*

There is no restriction on the number of organizations that are associated with any single territory. For example, if the manufacturer was divided by business unit, then multiple sales organizations may map to the same territories.

Unassociated Territories

As with users, territories may be unassociated for the identical reason that users and groups may be unassociated. An unassociated territory may be accessed by all users. However, a descendant of an unassociated territory does not inherit any territory-organization association.

4.3.2 Catalog-based Associations

It is common for organizations to have access to only a subset of the catalog. Generally, the catalog is divided at a high level into product lines. Each organization can specify which product lines are available to that organization. If no product lines are specified, then this implicitly means that there is no product line restriction.

Within the Model N product catalog, there is no notion of product lines or families. Rather, the upper levels in the catalog are expected to define the product lines and families. Therefore, both categories and products can be associated with organizations. The rule that determines the organizations associated with a category or product is:

> *All organizations that are directly associated with a given category or product or that have an ancestor that is directly associated with that category or product.*

There is no restriction on the number of associations that any given category or product may have.

The category level associations are used when browsing the catalog. In the catalog, the user may not see the category if the category is not visible to that user's organizations. Sub-categories or items do not inherit associations from their parents, so it is possible to have items that can be associated with a given organization, even if a parent category would not be visible. In this case, the products can be found through searches.

4.3.2.1 Unassociated Products and Categories

Categories and products can be unassociated with organizations.

4.3.3 General Data–Organization Associations

This section describes how all other forms of data can be associated with organizations, such that visibility can be used to control whether a user has access to the data or not. This general data association can occur in one of two ways: direct or indirect association.

4.3.3.1 Direct Association

A data record may be directly associated with an organization. Direct association is useful for records that users closely associate with organizations, such as approval routes or price floors.

The visibility rule to define the organizations that are associated with a given data record is:

> *All organizations that are directly associated with a given data record or that have an ancestor that is directly associated with that data record.*

The editability rule to define the set of organizations that is associated with a given data record is:

> *All organizations that are directly associated with a given data record.*

To more broadly associate data records, attach the record to an organization that is higher in the organization hierarchy.

4.3.3.2 Indirect Association

A data record may be indirectly associated with an organization through a data relationship. Indirect association is useful for records that can be considered part of a given organization due to the relationship of data that is associated with that organization, such as an independent contract for a customer would be associated with the organization of that customer.

In contrast to direct associations, any single data record may be indirectly associated through multiple relationships. Each relationship would define a set of associated organizations. The set of associated organizations for that data record would be the intersection of the associated organization sets from the relationships. Therefore, the rule is:

> *All organizations that exist within all of the organization sets from the related records.*

For visibility rules, the set of organizations is the intersection of the visibility rule sets (including descendant organizations). For editability rules, the set of organizations is the intersection of the editability rule sets (not including descendant organizations).

4.4 Organization Management

Organizations are managed through the Users and Organizations module of the Administration Console. See Users and Organizations Pages for detailed page information.

In general, the steps involved in managing an organization are:

- Add an organization
- Associate users
- Associate customers
- Associate territories
- Associate products
- Associate competitor products

4.4.1 How to Add Organizations

1. Go to the Organizations Search and List View Page: **Administration > Users and Organizations > Organizations**.
2. On the left, under **Administration Tasks**, click **New organization**.
3. In the Add Organization dialog box, enter the name for the new organization and select a parent organization. Click **OK** when finished.
4. On the General page, verify the Name and enter an ID, Locale, Currency, Time Zone, whether or not this is a Sales organization, and a Description.
5. On the left, under **Organization Tasks**, click **Save**.

Additionally, you can add organizations to the Model N system using data flows or by cloning existing organizations.

Note: When cloning an existing organization, only the organization attributes are copied. Existing associations are not copied.

4.4.2 How to Associate Users to an Organization

1. Go to the Organization General Page: **Administration > Users and Organizations > Organizations > Name** link**.**
2. On the left, under **Organization**, click **Associated Users**.
3. Click **Associate**. The Select a Staff Member dialog box opens.
4. Find the user to associate and click **Add**.
5. Determine if you need to update the user's locale, time zone, and default organization, then click **OK**.

4.4.3 How to Associate Customers to an Organization

Note: Customers can only be associated with sales organizations.

To associate customers to an organization, that organization must be marked as a sales organization.

1. Go to the Organization General Page: **Administration > Users and Organizations > Organizations > Name** link**.**
2. On the left, under **Organization**, click **Associated Customers**.
3. Click **Associate**. The Select Customer dialog box opens.
4. Find the customer to associate, click **Add**, then click **OK**.

4.4.4 How to Associate Territories to an Organization

1. Go to the Organization General Page: **Administration > Users and Organizations > Organizations > Name** link**.**
2. On the left, under **Organization**, click **Associated Territories**.
3. Click **Associate**. The Select a Territory dialog box opens.
4. Select the territory to associate, then click **OK**.

4.4.5 How to Associate Products to an Organization

1. Go to the Organization General Page: **Administration > Users and Organizations > Organizations > Name** link**.**
2. On the left, under **Organization**, click **Associated Products**.
3. Click **Associate**. The Add Product Categories/Items dialog box opens.

4. Select the product to associate, click **Add**, then click **OK**.

4.4.6 How to Associate Competitor Products to an Organization

1. Go to the Organization General Page**: Administration > Users and Organizations > Organizations > Name** link**.**
2. On the left, under **Organization**, click **Associated Competitor Products**.
3. Click **Associate**. The Add Product Category/Items dialog box opens.
4. Select the product to associate, click **Add**, then click **OK**.

4.5 Organization Aware Configuration

Certain Model N objects can be configured to have different values for different organizations. These objects include some of the following:

- Validations
- Enumerations
- Application switches

See the "Configuration Console" chapter of the *Operations Guide* for information on setting these values.

4.6 Organizations and Globalization

A multi-organization deployment has many globalization requirements so that users can interact with the system from different locations.

Within the Model N system, the administrator can set permissions to determine whether a business user can view or edit data records within the context of the current user. Every user can set the time zone and locale in their user preferences. If set, the user interface always renders dates, currencies, numbers, and so on with respect to those preferences. If not set, then the system defaults are used. This behavior works when all data records are viewed and edited by users having the same preferences.

5 Time Zone Handling

This section of the document describes how time zones are handled throughout the Model N system and how that impacts dates. *Time zone* refers to a region on the earth that has a uniform standard time. The local time in that region is defined as an offset from Coordinated Universal Time (UTC), also known as Greenwich Mean Time (GMT). For consistency in the documentation, UTC is used throughout.

The way dates are stored and displayed in the Model N system will vary depending on:

- The type of date (effective dates, action date, time assumed dates).
- Where in the Model N system the information is being accessed.
- The time zone settings.

5.1 Model N System Time Zone

The Model N system time zone is the configuration for the entire Model N system. That time zone setting must be set in the database, application server JVMs, and Cognos.

Note: For global deployments, set the system time zone to UTC.

5.2 Dates in the Database

Dates for the Model N system are stored in the database using the Oracle TIMESTAMP data type. This data type stores the time component as hours, minutes, seconds, and so on. Oracle does not store the time zone that the value is relative to. Rather, the time is assumed to be relative to the Model N system time zone. Using the TIMESTAMP type means that all dates must have a time component. This allows the system to be sensitive to changes that happen during the day. All dates stored in the Oracle TIMESTAMPs use the same time zone reference. This ensures that any date value in the database can be compared against each other without any time zone conversions.

The `MN_DATE_DIM` table is used to represent calendar information. Each row in this table represents one day. The column `assumed_time_sql` provides a default time to use, when the time of any given date field is unknown. For example, when a direct sale line is loaded, the invoice date typically only contains the date, but no time, so we use the assumed time sql to set the time.

Be default, 10:30 A.M. UTC is used because this time ensures that most locations in the world (UTC+13 through UTC-10) will fall in the same day. This is used by time assumed dates.

5.3 Dates in the Applications

The Model N applications represent date and time information in the following manners.

5.3.1 System Time

Since there are multiple machines involved in any Model N system deployment, the Model N system uses the database time as the system time. In other words, the current time in the Model N system should always be equivalent to asking the database what the time is.

5.3.2 Java Date Class

Within the applications of the Model N system, all dates are represented using the Java Date class or subclass of Java Date. Therefore, dates in Java are independent of time zone. Time zone handling is only relevant when interpreting dates and times that are entered by the users or coming in from external systems, or when printing dates and times to the users or sending to external systems.

Java represents dates internally as the number of milliseconds from January 1st, 1970, 00:00:00.000 GMT.

5.3.3 JVM Time Zone

When loading data from or saving data to the database, the dates are all converted using the Java VM time zone (the `user.timezone` Java system property) configuration before saving to the database. This logic requires the Java VM time zone be configured identically to the database time zone.

5.3.4 Searching Against Date Fields

Searches that included date fields are handled as follows:

- **Effective Dates:** When the user enters a data range (from and to dates) against the start effective date, the search finds all the records that are between those dates as per their individual document time zones (and not database time zone). 'From' dates are interpreted to be the start of day of the user entered date in the earliest time zone (UTC+13) and the 'To' dates are interpreted to be the start of day of the user entered date in latest time zone (UTC-10). Similarly for end effective date searches, 'from' dates would be end of day of the user entered date in earliest time zone (UTC+13) and 'to' dates would be end of day of the user entered date in latest time zone (UTC-10).
- **Action Dates:** User entered dates are interpreted in user's time zone.
- **Time Assumed Dates:** The time is assumed to be 10:30AM UTC when an 'Equals' search is performed (as opposed to date range search).

5.4 Dates in Documents

Documents, such as contracts and price lists, exist within a known context. For example, when a contract that is created in Germany should come into effect and expire on midnight in the German time zone (Central European Time). It's important to note that the time zone for the user should not impact the document. We need to ensure that users from different time zones can work on the same document and have the same view on that document. Let's look back at our German contract. If a user from another time zone (e.g. United Kingdom in Western European Time) views and edits that contract, they must not inadvertently change the time zone of the contract.

5.4.0.1 Time Zone Reference

For documents that require time zone references, those documents have a time zone attribute that is set when the document is created and based on the time zone of the user creating the document.

Note: Once the document is saved, the time zone cannot be changed.

5.4.1 Time Zones and Effective Dates

Documents maintain a notion of time zone. The time zone is edited in the General page in the detail component and defaults to the time zone from the user profile when a new document is created. If that value is not available, then it defaults to the Model N system time zone.

All effective dates within the document reference this time zone to define what the start and end of day would mean. This allows users from different time zones to edit the same document without their time zone settings impacting the dates and times of the contract.

Note: Once the document is saved, the time zone cannot be changed.

5.4.1.1 Within Detail Components

Within the document, all effective dates are relative to the time zone defined on the document, including all effective dates throughout the documents. For example, the commitment or pricing line item start or end dates are relative to the time zone on the contract header.

The effective dates show only the date component and not the time component. The reason is that the time component is clearly defined:

- Start Date: An effective start date begins at midnight in the time zone of the document (e.g. 01/01/2009 00:00:00.000).
- End Date: An effective end date ends one millisecond before midnight in the time zone of the document (e.g. 12/31/2009 23:59:59.999).

Outside the detail component (such as on search pages), the date is reflected in the document time zone.

5.4.2 Action Dates

Not all dates in the document are relative to the time zone on the document. Dates that are based on the when actions occurred (such as when a contract was first created or last versioned) are relative to the time zone for the user and are set based on the exactly when the transaction was posted.

For these dates, the time component is shown to the user, since the actual time of the action is important and the time zone in the user profile is used. The locale of the user is used to format the dates.

5.4.2.1 Effective Dated Documents

The following list of documents or objects contain a time zone reference:

- Chargeback Claim
- Compliance Profile
- Contract Offer
- Contract Template
- Customer Class of Trade
- Data Map (Customer, Product, UOM)
- Market Basket
- Mass Update
- Membership
- Payment Package
- Price Master Line Item
- Price List
- Price Plan
- Rebate/Fee Program
- Rebate/Fee Payment

5.4.3 User-Based Dates

If you are not within the context of a document that is time zone aware, then the time zone defined in the user profile is used when viewing or editing any dates.

5.4.3.1 Effective Dates in Non-Time Zone-Aware Documents

If an effective date field resides outside a time zone aware context, such as a time zone aware document, then the date is set based on the Model N system time zone. This guarantees that the dates are interpreted consistently, even if the object was loaded through a data flow or set in the UI. Moreover, this ensures that if users in different time zones edit the dates, they are interpreted consistently.

5.5 Back-end Processing and Dates

The Model N system performs a significant amount of back-end processing to calculate rebates, compliance, and government pricing. The following sections describe how the different types of processing handle dates.

5.5.1 Java-based Processing

This section describes Java-based processing of dates.

5.5.1.1 CMnDateUtil Usage

5.5.2 Timers

Timers, also referred to as *commands*, are the means by which background processing occurs within the Model N system. Timers can be scheduled, such as reports or integration data flows; they can also be triggered by user actions.

5.5.2.1 Active Time Zone

When a timer runs, the active time zone (the time zone that is available in the `CMnCtx`) is set based on the usage of the timer, that is if the timer is triggered by a schedule or a user action.

Scheduled Timers

For scheduled timers, the active time zone is set based on the time zone specified in the schedule. For timers that are loaded (through the `TimerStoreFromXml` data flow), the time zone is specified in the timer store XML definition.

Note: In many cases, the time zone that is used in the scheduled timer is not the active time zone, but based on the context of the processing. For example, for Batch Price Monitoring, the start and end dates on the lines are based on their associated price list or contract documents and not on the active time zone of the timer.

User Triggered Timers

For user triggered timers, the active time zone is set to the time zone from the calling user.

Note: In many cases, the time zone that is used is not the active timer. For example, the price master line items populated during the contract implementation leverages the same time zone reference as the contract.

5.6 Dates and Data Flows

5.6.1 Default Time

In most cases, the data coming in from external sources (such as an ERP or users) do not have a time component associated with dates. For example, the invoice date for an order simply contains the date, but not the exact time of the order. However, in the Model N system, times are required. Since the times are not known, a default time needs to be applied to the data and it must be a time that does not cross a day boundary for the relevant locations of the world.

The time of 10:30 AM UTC is set as the default time as it covers all locations from UTC+13 through UTC-10. The locations not covered (i.e. UTC-11 and UTC-12) include Midway and Samoa.

This time is used in many locations in the application and is `assumedTimeInGMT` property on the `DateDim` FGO. The format is "HH:MI:SS.SSS".

5.6.2 Inbound Data Flows

This section describes how dates are handled in inbound data flows.

5.6.2.1 Default Date Handling

The default behavior of any date field that includes a time component is to interpret the time using the Model N system time zone. Dates imported by inbound data flows are handled as follows:

- **Effective Dates:** imported using the time zone associated with the document. If the document is not time zone aware nor contained within a time zone aware document, then default import time zone is used.
- **Action Dates:** imported using the default "import" time zone. By default, this is configured to be the system default time zone or the JVM time zone.

5.6.2.2 Supported Date Formats

By default, all dates are imported using the ISO8601 format: "yyyy-MM-dd HH:mm:ss".

A specific date format can also be configured for an inbound data flow as an entry configuration property to be used for importing dates, such as:

```
<Property Name=".DataFormat" Value="MM-dd-yyyy"/>
```

Direct Loader Date Formats

Direct Loader uses the ISO8601 format as the default date format for importing dates and supports the following date and time pattern strings.

Table 5-1: Direct Loader Date and Time Strings

Pattern	Description
yyyy	Pattern string for year, such as 2010.
MM	Pattern string for numeric month, such as 07.
dd	Pattern string for day in month, such as 27.
HH	Pattern string for the hour in a day (0-23).
hh	Pattern string for the hour in the AM/PM format (1-12).
mm	Pattern string for minute in an hour.
ss	Pattern string for second in minute.
SS	Pattern string for milliseconds.
a+	AM or PM marker, such as AM.
Z	RFC 822 time zone format.

5.6.3 Outbound Data Flows

5.6.3.1 Default Date Handling

The default behavior of any date field that includes a time component is to render the time using the Model N system time zone.

5.6.3.2 Supported Date Formats

All dates are exported using the ISO8601 format as “yyyy-MM-dd HH:mm:ss”. This means that when using the system time zone for exporting effective dates, the dates exported with the time component as say, “2009-12-28 07:59:59” if the JVM time zone is GMT and the effective date was “2009-12-27 23:59:59” in PST.

As with inbound data flows, a specific date format can also be configured for an inbound data flow as an entry configuration property to be used for importing dates. See Supported Date Formats on page 44 for more information.

5.7 Reporting and Dates

This section focuses on the SQL-based out of the box reports and the infrastructure that supports them.

5.7.1 Date Prompts

The date prompts provide a way for users to enter dates as report parameters and are typically used to restrict the range of the report. Date prompts that are not Range type (meaning single date boxes) get interpreted in the user's time zone. DateRange prompts that go against the start or the end effective dates of a time zone aware object get interpreted as 'from' dates are interpreted in earliest time zone and 'to' dates are interpreted in latest time zone.

To match the rest of the application suite, these dates are interpreted using the time zone in the user profile. For scheduled reports, the time zone comes from the profile of the user that scheduled the report.

5.7.2 Reporting Queries

Dates within reporting queries use the Model N system time zone.

5.7.3 Report Results

Dates within reporting results use the Model N system time zone.

5.8 Performance Analytics and Dates

The Performance Analytics application provides the ability to rapidly explore and analyze transaction based data. The transactional data is transformed in an ETL layer that publishes to an analytics schema that is a closer match to the analytics performed.

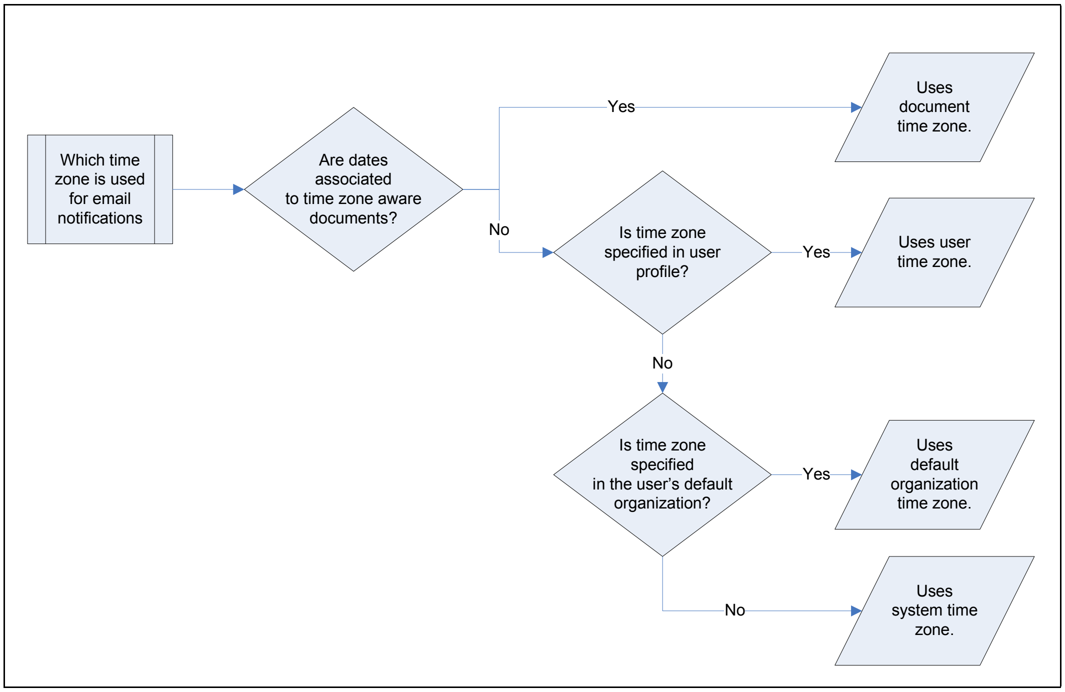
In Performance Analytics, all date and time information is tied to the date dimension, which has a day granularity, so no time zone issues exist.

5.9 E-mail Notifications

Most e-mail notifications are targeted at a specific known user in the Model N system. As such, notifications are formatted based on the appropriate time zone and locale. As with the user interface, dates that are not associated with time zone aware documents should use the time zone based on the user profile. Effective dates associated with time zone aware documents are based on the time zone in the document.

If the time zone is not found in the user profile, the time zone from the active organization (that is, the time zone from the default organization in the user profile) is used. If the active time zone is not available, then the system time zone is used. This is illustrated in the following diagram.

Figure 5-1: Time Zone Handling for E-mail Notifications



6 LDAP Server Authentication

LDAP (Lightweight Directory Access Protocol) is a dominant standard for user authentication and for storage of user profile data. Many Model N customers use LDAP for user management. This chapter describes configuration of an LDAP compliant server as the authentication provider for use with the Model N application.

By default, the Model N application stores all user data in its database and performs authentication using database lookups. When the LDAP plug-in is enabled, the Model N application authenticates the user's identity by way of the configured LDAP server.

6.1 How to Configure LDAP Server Authentication

To use an LDAP server to authenticate users in the Model N application:

1. Verify the following information for your LDAP server.

Table 6-1: LDAP Server Information

Name	Description
LDAP server name	The LDAP server host name.
LDAP server port	The LDAP server port number. This is typically 389 for non-SSL and 636 for SSL.
LDAP security level	The value of the security Authentication attribute. Possible values are: • none • simple • strong.
LDAP search base	The distinguished name of the search base object. Defines the location in the directory from which the LDAP search begins.
LDAP user ID attribute	Typically, this is `sAMAccountName` for Active Directory.
LDAP service account DN	Distinguished name of the user used to connect to the LDAP server.
LDAP service account password	The password for the service account DN.
LDAP user account control flag attribute	The attribute in LDAP (Active Directory) that contains information on the state of the account. In Active Directory, this is `userAccountControl`.

2. In the Model N application, go to the Global Application Switches page: **Configuration > Global Application Switches.**
3. Set the application switch `com.modeln.authenticate.plugin.enabled` to *`true`*.
4. Configure the following applications switches as they relate to your LDAP server
   - Set `com.modeln.authenticate.plugin.LdapServerName` to the LDAP server host name.
   - Set `com.modeln.authenticate.plugin.LdapPortNumber` to the LDAP server port number. If this property is not set, the default value is 389.
   - Set `com.modeln.authenticate.plugin.LdapSecurityLevel` to the appropriate level. Possible values are: none, simple, or strong.
   - Set `com.modeln.authenticate.plugin.LdapBaseDn` to the domain name for where user searches should start. The value should be a comma

separated list of values in reverse hierarchical order from the organizational unit up to the domain name, such as:

```
ou=sales,dc=us,dc=company,dc=com
```

- Set `com.modeln.authenticate.plugin.LdapUserIdAttrName` to the field name that the user name lookups will be performed on. If this property is not set, the default value is `uid`. Active Directory users should try the default value `sAMAccountName`.
- Set `com.modeln.authenticate.plugin.LdapServiceAccountDn` to the LDAP directory service account's DN. All directory operations will be performed with this account. The service account must be able to perform searches on users.
- Set `com.modeln.authenticate.plugin.LdapServiceAccountPassword` to the LDAP directory service account's password. Note that the password is stored in the encrypted state in the database.
- Set `com.modeln.authenticate.plugin.isActiveDirectoryServer` to *true* if using Active Directory. By default, this is set to *false* to skip validating the user account control status.
- Set `com.modeln.authenticate.plugin.ADUserAccountControlAttrName` to the field that contains bit flags to manipulate user account properties. If using Active Directory, this value is `userAccountControl`. When set, the following bits are checked to see if user accounts are locked out or disabled:
  - ACCOUNTDISABLE (Hex value0x0002, decimal value 2)
  - LOCKOUT (Hex value0x0010, decimal value 16)

5. Configure the following application switches as needed:
   - To configure a list of users to bypass the LDAP authentication, set `com.modeln.authenticate.plugin.byPassUsers` to a comma-separated list of user IDs to only use the Model N authentication. By default, this list contains the user `Administrator`.
   - To configure the length of time in seconds before a log in attempt times out, modify `com.modeln.authenticate.plugin.connectionTimeout`. A reasonable default value is 60 seconds.
6. For each user to use LDAP authentication to access the Model N application, create the same user ID in both the Model N application and the LDAP directory.
7. Restart the Model N application for the changes to take effect.

Once LDAP server authentication is enabled, the password field during log in to the Model N application is hidden. Additionally, users are not able to change their password for their Model N user account on the Account Information Page.

7 Print Templates & Contract Terms

Print templates are designed to pull fields from one document and merge them into the fields on another document. For example, fields are pulled from the contract contained in the Contract Management application and then merged into pre-defined fields in the print template. Payment packages and rebate payments also use print templates.

Contract terms include the legally binding terms and conditions that apply to an entire contractual agreement. Contract terms is nothing more than a specific print template type.

7.1 Print Templates

The document printing support in the Model N system uses an expression language to provide flexibility in generating print templates. Microsoft Word XML is used to construct both the print templates and the subsequent output.

Important: If you had custom print templates created for a release of Model N prior to Model N 5.4, you will need to recreate them in Word XML.

You will need to have at least Microsoft Office 2003 with Service Patch 3 for print templates to work properly as of Model N 5.4.

7.1.1 Master Pages

A *master page* is a master document that is a starting print template to be used as input, along with the object that user wants to print, to the Word XML engine. The engine takes these inputs and generates a final Word XML document out of it. A master page may also include other print templates associated with the object. The result of this is a Word XML document that has the output of all the print templates associated with the object together in one document.

Note: Master Page was formerly known as Cover Page prior to Model N 5.4. Some instances of "cover page" may still exist in the application code.

A print template can be marked as a master page by selecting the **Is Master Page** check box on the print template detail page. There is only one instance of a master page per printdoc template type and organization. At runtime, when a user clicks the print button, for example on a contract page, the application tries to pull up the master page tied to the organization of the contract. If it does not exist, it pulls from the nearest ancestor organization. If it does not exist all the way to the root organization, an error message displays stating that the master print template is missing.

Note: If org is set to null, then it is going to be used only for documents that are not org-aware. Therefore, it is not necessary to set org as null for contracts since they are org-aware objects.

7.1.2 Lock Version

You can lock a particular print template to avoid any inadvertent overrides by another user to this print template. Note that a contract gets tied to a particular version of a print template, so when the user clicks **Lock Version** on the print template detail page, the version number is incremented by 1 and any further uploads or title changes apply to this new version.

7.1.3 Print Template Creation

Print templates are constructed in Microsoft Word XML.Model N specific constructs are created using MERGEFIELD and are evaluated dynamically when the templates are run against objects.

The following constructs are supported within a print template.

Table 7-1: Supported Print Template Constructs

Syntax	Definition
:if:*expr*	If *expr* returns true, then include the print section between this field and the corresponding end field. If *expr* returns false, then the print section is removed.
:endif:	End tag that defines the end of the :if: block.

Table 7-1: Supported Print Template Constructs (Continued)

Syntax	Definition
:loop:*var*:*expr*	The loop field iterates over the collection returned by *expr*, repeating the print section, for each element in the collection. For each iteration, the current element is stored in the *var* variable.
:endLoop:	End tag that defines the end of the :loop: block.
:row:*var*:*exp*:*dependentVarr*	The row field is similar to the :loop: field, except that it applies in the context of a table. The *var* and *expr* are identical to that in the :loop: field. The last attribute *dependentVar* is to identify the variable that the row expression is dependent on. If the row expression is dependent on the column expression, then the *dependentVar* for the row expression would be the variable of the column expression.
:rowEnd:	End of the row tag.
:col:var:expr:dependentVar	Column field which like row field applies in the context of a table. The entire column (including the rows) are copied as many times as the collection size (after accounting for the skip rows before iterating). Please see :row note for dependentVar explanation.
:colEnd:	End of the column tag.
:include:*expr*	The include field is used to dynamically include another print template into the given location in the template. The *expr* returns an `IMnWordXmlTemplate` object.
expr	If there is no ":" qualification, then this field is simply evaluated as an expression (that is, *expr*). The returned value is injected directly into the print template.

All of the constructs listed in the previous table must be defined as MERGEFIELDS in the print template doc.

Keywords that developers can use within an expression are:

Table 7-2: Keywords for Use Within Print Template Expressions

Syntax	Definition
root	The object being printed onto the template is pushed as 'root'variable on the expression language context. Example: For contracts, root is the contract object. The expressions are such as root.getContractNum().

Table 7-2: Keywords for Use Within Print Template Expressions (Continued)

Syntax	Definition
<var>Index	It gives int value of the row/column currently under process. Every row and col tags have variable names. Example: If the variable name used in a row expression is foo, then 'fooIndex' gives the index of foo into the collection returned by the row expression.

7.1.4 How to Upload a Print Template

1. Go to the Print Templates Page: **Administration > Print Templates.**
2. Click **New print template** from the Administration Tasks panel. The New Print Template dialog box opens.
3. Enter a name and select the document type, then click **OK**.
4. Select an Organization if required.
5. Click **Upload Word XML** from the Print Templates Tasks panel. The Upload Print Template dialog box opens.
6. Enter the file to upload, or browse to find it.
7. Click **OK** to upload the print template.

7.1.5 How to Download a Print Template

1. Go to the Print Templates Page: **Administration > Print Templates.**
2. From the Print Templates page, click the name link for a print template you want to download.
3. From the Print Template Detail page, click **Download Word XML**. A confirmation dialog box opens.
4. Click **Save**. The Save As dialog box opens.
5. Determine the file name and location where to save the file and click **Save**.

8 Extended Attributes

Extended Attribute pages are where you can add Flex Fields. Flex Fields let you extend specific objects (like customers or contracts) or sub-objects (like products groups or programs within a contract) with extra fields. Each field may be a basic type (date, string, or number) or have a set of legal values (such as enumeration).

Extended fields may be available through integration, reporting, or analytics and may be used in rebating, Discount Reallocation, and Government Pricing.

8.1 How to Add Flex Fields

Flex Fields can be added to an FGO model dynamically as FGO attributes using dynamic models.

A dynamic model allows an FGO model to be augmented by registering the additions to the existing FGO model as "dynamic" models. For example, you can add an attribute called `ExternalReferenceNum` to an existing FGO, such as `UserAcct`, by adding or updating the `UserAcct` FGO configuration XML in the file `<module>/conf/fgo/UserAcct.xml` as follows:

```
<fgo name="UserAcct">
    <dynamicModel name="MyDynamicModel">
        <attr name="ExternalReferenceNum"
            col="ext_ref_num" type="long"/>
    </dynamicModel>
```

```
</fgo>
```

As of the Model N release 5.5, the dynamic model support has been enhanced to configure attributes and identify them as Flex Fields. The following fields are part of this support:

Table 8-1: Supported Flex Fields

Name	Description	Possible Values	Required
flexField	Whether the attribute is a Flex Field.	true or false	No. Defaults to false.
displayOrder	Expected to be used to order the Flex Fields while rendering them on the UI.	For example: 10.2, 12	No. Defaults to the order in which the attributes are added.

The existing `reportName` attribute is expected to be used as a display label for the Flex Fields. The attribute name is used as a default value if no report name is specified.

Using the described attributes, you can add Flex Fields to the `UserAcct` FGO as follows:

```
<fgo name="UserAcct">
    <dynamicModel name="MyFlexFieldsModel">
        <attr name="ExternalReferenceNum"
            col="ext_ref_num" type="long"
            flexField="true" displayOrder="10"
            reportName="Reference Number"/>
        <attr name="AccountNum"
            col="acct_num" type="int"
            flexField="true" displayOrder="20"
            reportName="Account Number"/>
    </dynamicModel>
</fgo>
```

8.2 How to Access Flex Field Values

The Flex Field values can be accessed using the regular FGO getters and setters based on the attribute or field type.

For example, the Flex Field `AccountNum` can be accessed as:

```
String acctNum = userAcct.getInt("AccountNum");
```

And updated as:

```
userAcct.setInt("AccountNum", acctNum);
```

9 Administration Pages

The following UI elements apply to the various pages available from the **Administration** menu.

9.1 Administration Tool bar

Navigation Path: **Administration >** page name

The tool bar contains buttons for basic tasks. The availability of the buttons and tasks depends on the area in which you are working, your user role, and the status of the item you are working on. Refer to the following table for a complete list of buttons on the Administration tool bar.

Table 9-1: Administration Tool bar

Button	Description
New	Lets you create any one of the following: • New user • New role • New organization • New business segment • New approval route • New print template • New contract term • Find user
Search	Searches for users that match the specified criteria.
Folders	List of folders under which users are stored.
Export	Launches the Export Search Result dialog box, which lets you export the list of territories to a .csv or .rtf file.
Run	Runs the selected data flow.
Import	Imports a single content file using the selected data flow configuration.
Activate	Activates a data flow configuration. When data flow is active, you may run the dataflow to populate content files.
Delete	Deletes the selected data flow configuration.
Deactivate	Make the data flow inactive. If you need to edit the data flow configuration, it must to be deactivated first.
Delete data flow results	Deletes the results from a data flow.
Cancel data flow	Cancels a data flow that is currently running.
Save	Saves changes.
Save As	Lets you save the changes made as a new object.

Table 9-1: Administration Tool bar (Continued)

Button	Description
Print	Lets you print.
Edit/Read Only	Makes the selected item editable/uneditable.
Mark/Unmark as a Sales Organization	Mark or unmark an organization as a sales organization.
Help (?)	Provides access to the user documentation (user and reference guides). User documentation is also available from the Help menu.

9.2 Administration Navigation Panel

The navigation panel contains links to basic tasks and documents. The links are dynamic and depend on the area in which you are working and the status of the document you are working on. Refer to the following table for a complete list of links available.

Table 9-2: Administration Navigation Panel

Navigation Panel	Link	Description
Administration Tasks		
	New user	Opens the New Staff page, which lets you create a new user.
	New role	Opens the Add Role/Group dialog box, which lets you create a new role.
	New Organization	Opens the Add Organization dialog box, which lets you create a new organization.
	New business segment	Opens the Add Business Segment Template page, which lets you create a new segment.

Table 9-2: Administration Navigation Panel (Continued)

Navigation Panel	Link	Description
	New approval route	Opens the Select Route Type page, which lets you select a route type from the drop-down menu: • Medicaid Payment • Medicaid Program • Price Floor • Chargeback Claim • Mass Update • Workbook • Contract • Promotion • Price List • Payment Package • Estimated Payments
	Find user	Opens the Users search panel where you can search for users by name, role, and type.
Administration Folders		
	Users and Organizations	Contains links to Users, Roles, Sales Territories, and Community.
	Users	Opens the Users page, which displays a lists of user names, IDs, and types. Other links may exist under this link if users are assigned to groups or organizations.
	Roles	Opens the Roles page, which displays a lists of roles and role groups. Other links may exist under this link if roles are assigned to parent roles.
	Sales Territories	Opens the Sales Territories page, which displays a list of sales territory names, IDs, and types. Other links may exist under this link for territory alignment.
	Community	Opens the Community page, which displays a list of communities, their member subtype, and status.

Table 9-2: Administration Navigation Panel (Continued)

Navigation Panel	Link	Description
	Approval Routes	Opens the Approval Routes page, which displays a list of approval routes, descriptions, status, route type, and when they were last updated.
	Print Templates	Provides access to Print Templates and Contract Terms.
	Customer Options	Opens the Customer Options page, which has links to Preferred GPO and File Formats.
	Product Options	Opens the Product Options page, which has links to Labeler Codes and Business Segments.
	Medicaid Options	Opens the Medicaid Options page, where you can view medicaid related links.
	Data Flows	Opens the Data Flows page, where you can view the data flows, groups, and results.
	Monitoring	Lets you monitor the overall performance of the server, tasks, sessions, and queries.
	Management	Opens the Management console for access to the Nodes, Locks, Jobs, and Job Queue pages.
	External Data Entries	Lets you view saved configurations from ERPs.
	Installation Verification	Provides the details of the Model N installation. See the *Installation & Migrations Guide* for more information.
	Calendar	Opens the Calendar page where you can configure an alternative calendar to better manage accounting periods.
	Validations	Lets you configure validations.
	Rates	Lets you configure Rates.

Table 9-2: Administration Navigation Panel (Continued)

Navigation Panel	Link	Description
	DRM Default Options	Lets you the default values for all discount parameters. You can also set if a parameter belongs to a Summary view. When the administrator sets a parameter as Summary, the same parameters are displayed in the Bundle Information Page
	Saved Searches	Opens the Saved Searches page where you can link to the searches that were saved.

10 Users and Organizations Pages

The following UI elements apply to the various pages available from the **Administration > Users and Organizations** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you’re in Read-Only or Edit mode or creating a new object.

10.1 Users Search and List View Page

Navigation Path: **Administration > Users and Organizations > Users**

The Search and List view page displays the configured Model N system users.

Table 10-1: Users Search Panel and Results

Name	Type	Description
Search		
Name	Text box	Limits the search results to Model N system users that match the search criteria.
Role	Drop-down list	Filters by the roles available in the Model N system.
Type	Drop-down list	Filters by user or group.
Organizations	Organization selector	Limits the search to users within the specified organization. Setting this to `My Orgs` behaves the same as clicking the 'button. Setting this to `No Orgs` (by opening the Select Organization dialog box and clicking **OK** with no organizations selected) is equivalent to clearing all organization selections.
My Orgs	Button	Restricts the search to records associated with organizations that the presently logged in user is also associated with.
Only	Check box	Select this option to find only those users that are directly associated with the specified organizations.
Search	Button	Searches for users that match the specified criteria.
Clear	Button	Clears the search criteria.
Save As	Button	Saves the search criteria to the Saved Searches folder for future use.
Results		
Name	Link	Name of the Model N system user or group. The name is a link to the General page.
ID	String	ID of the Model N system user or group.

Table 10-1: Users Search Panel and Results (Continued)

Name	Type	Description
Type	String	Identifies the object type, for example, user or group.

10.2 New Staff Page

Navigation Path: **Administration > Users and Organizations > Users > New User**

The New Staff page lets you create new users and groups for the Model N system.

Table 10-2: New Staff Page

Name	Type	Description
Type	Drop-down list	Limits the new staff to either a group or member.
Group Name *	Text box	The name of the group you are creating. (Available only when **Type** is set to `Group`.)
First Name *	Text box	The first name of the user you are creating. (Available only when **Type** is set to `Member`.)
Last Name *	Text box	The first name of the user you are creating. (Available only when **Type** is set to `Member`.)
Location *	Text box and Chooser button	Opens the Select a Location dialog box to select into which group you want to create the user or group.
Organization *	Text box and Chooser button	Opens the Select Organization dialog box to select into which organization you want to create the user or group.
Cancel	Button	Cancels the creation of a new user or group.
Finish	Button	Creates the new user or group, then displays the Profile page for that item.

10.3 Profile Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link

OR

Navigation Path: **Administration** > **Users and Organizations** > **Users** > *user folder* name > *group name* link

The Profile page displays the name, ID, title, and contact information of the selected user or the name, ID, and primary email of the selected group.

Table 10-3: User Profile Page

Name	Type	Description
First Name	Text box	The first name of the user. (Available only when **Type** is set to `Member`.)
Last Name	Text box	The first name of the user. (Available only when **Type** is set to `Member`.)
Group Name	Text Box	The name of the group. (Available only when **Type** is set to `Group`.)
ID *	Text box	The ID for use within the Model N system. When the user is first created, a number is given. It should be replaced with an ID the user will remember.
Title	Text box	The organization title of the user. (Available only when **Type** is set to `Member`.)
Phone	Text box	The phone number of the user. (Available only when **Type** is set to `Member`.)
Primary Email	Text box	The email address of the user.
Primary Address	Chooser button	Opens the Edit Address dialog box where a street address can be entered. (Available only when **Type** is set to `Member`.)

10.3.1 Edit Address Dialog Box

Navigation Path: **Administration** > **Users and Organizations** > **Users** > user *Name* link > **Primary Address** Chooser button

The Edit Address dialog box lets you modify the primary address for the user.

Table 10-4: Edit Address Dialog Box

Name	Type	Description
Street	Text boxes	The street address.

Table 10-4: Edit Address Dialog Box (Continued)

Name	Type	Description
City OR Town/City	Text box	The city or town of the address.
State OR Region/Province	Text box	The state, region, or province of the address.
Zip OR Postal Code	Text box	The zip code or postal code of the address.
Country	Drop-down list	The country in which this address is located.

10.4 User Roles Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link > **Roles**

The Roles page under Users lets you view and modify the roles associated with the user.

Table 10-5: Roles Page

Name	Type	Description
Role name	String	The list of available user roles.
Role group	String	The role group to which the user role belongs.
Assigned	Check box	Select the check box to assign the role to this user.
Inherited role	Check box	This check box is selected if the user role is assigned by inheritance from a parent object.
Inherited from	String	The object from which the role was inherited

10.5 Access Rules Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link > **Access Rules**

The Access Rules Page

Table 10-6: Access Rules Page

Name	Type	Description
Resource	String	The objects that control the UI elements of application functional areas.
Resource Description	String	The description of what element that resource controls.
Action	String	The type of access available to that resource.
Rule	String	The explicit definition as to whether or not the action is available.
Role	String	The role through which this resource/action pairing is available.
Inherited from	Strong	The parent object from which this access was inherited.

10.6 Capabilities Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link > **Capabilities**

The Capabilities page lets you view more fine-grained access controls for certain applications in the Model N application suite assigned to this user. As of Model N release 5.5, this only applies to the Sales application.

Table 10-7: Capabilities Page

Name	Type	Description
Module	String	The application or module in the Model N application suite where the capability applies.
Capability	String	A fine-grained rule allowing a single action to be performed, or a single type of thing to be viewed.
Capability Description	String	The description of that capability.

Table 10-7: Capabilities Page (Continued)

Name	Type	Description
Role	String	A group of capabilities, with a name that describes the logical purpose of all those capabilities combined. For instance, “Inventory Manager” or “Rebates Analyst”.
Inherit from	String	The parent object from which this access was inherited.

10.7 Account Information Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Preferences**

The account information page lets you configure a users login name and location settings.

Table 10-8: Account Information Page

Name	Type	Description
Login	Text boxes	The login ID for the user.
Password	String	The user’s log in password. **Note:** This field is not available if LDAP server authentication is enabled.
Default Organization	Text box/ Organization Chooser button	Opens the Select an Organization dialog box to let you associate an organization.
Time Zone	Drop-down list	Lets you set the time zone in which this user is located.
Locale	Drop-down list	Lets you set the locale in which this user is located.
Status	String	Whether the user account is currently active or inactive.

10.8 Alerts Configuration Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Alerts**

The Alerts Configuration page lets you configure which alerts a user will be notified of.

Table 10-9: Alerts Configuration Page

Name	Type	Description
Event	String	The name of the event for which the user may be notified.
Status	Drop-down list	A Yes/No list to set whether or not to be notified for that event.
Delivery	Check box	Lets the user receive email notifications of the alerts to which they are subscribed.

10.9 Contacts Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Contacts**

The Contacts page lets you configure contact information for a user.

Table 10-10: Contacts Page

Name	Type	Description
Event	Check box	Lets you select an item to delete it.
Name	String	Name associated with that contact.
Description	String	Description of the contact.
Type	String	Type of contact for this record.
Parameters	Text Box	Lets you enter the contact number or email address.
Add	Button	Opens the Add Contact dialog box where you can create a new contact.
Delete	Button	Lets you delete a currently selected contact method.

10.9.1 Add Contact Dialog Box

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Contacts > Add**

Table 10-11: Add Contacts Dialog Box

Name	Type	Description
Name	Text box	Name associated with that contact.
Description	Text box	Description of the contact.
Type	Drop-down list	Lets you select the type of contact method to create. The list of available options are: • Alternate Number • Business Fax • Business Number • Fax Number • Home Number • Mobile Number • Pager Email • Pager Number • Primary Email • Primary Phone • Secondary Email

10.10 Customer Alignment Page

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Customer Alignment**

The Customer Alignment Page lets you set which customers and territories a Model N system user is aligned with.

Table 10-12: Customer Alignment Page

Name	Type	Description
Direct Alignment		
[check box]	Check box	Selects individual lines to apply an action. Action buttons are limited to only those actions applicable across all selected lines. This field cannot be sorted.

Table 10-12: Customer Alignment Page (Continued)

Name	Type	Description
Name	Text link	Name of customer with which this user is aligned. The link takes you to the Customer Profile page.
ID	String	The customer ID within the Model N system.
City	String	The city from the customer's address.
State	String	The state from the customer's address.
Add	Button	Opens the Select Customer dialog box where you can search for and add customers in direct alignment to this user.
Delete	Button	Lets you delete customers from the user's alignment.
Territory Alignment		
[check box]	Check box	Selects individual lines to apply an action. Action buttons are limited to only those actions applicable across all selected lines. This field cannot be sorted.
Name	Breadcrumb links	Links to the Sales Territories General page for the aligned territories. See Sales Territories General Page on page 117 for more information.
Add	Button	Opens the Select a Territory dialog box where you can a territory with which this user should be aligned.
Delete	Button	Lets you delete territories from the user's alignment.

10.10.1 Select Customers Dialog Box

Navigation Path: **Administration > Users and Organizations > Users >** user *Name* link **> Customer Alignment > Direct Alignment > Add**

The Select Customers dialog box lets you search for and add customers to a user's direct alignment.

Table 10-13: Select Customer Dialog Box Search Criteria

Name	Type	Description
Look in	Drop-down list	List of folders in which to look for customer information.

Table 10-13: Select Customer Dialog Box Search Criteria (Continued)

Name	Type	Description
Back	Button	Takes you to the previous folder used in the **Look in** field.
Up	Button	Takes you to the level above the current folder in the **Look in** field.
Search	Button	Performs a search with the supplied criteria.
Browse	Button	Lets you search for a folder on your system.
Name	Text box	Searches for customers based on name.
COT	Drop-down list	Searches for customers based on class of trade.
City	Text box	Searches for customers based on city.
ID	Text box	Searches for customers based on ID.
State	Text box	Searches for customers based on state.
Type	Drop-down list	Searches for customers based on type.
Zip	Text box	Searches for customers based on zip code.
Search	Button	Performs a search with the supplied criteria.
Clear	Button	Clears the search criteria.

Once the search is performed, you can add the individual results to the user's direct alignment.

Table 10-14: Select Customer Dialog Box Search Results

Name	Type	Description
Name	Text link	Name of the customer. The link lets you select the record to add it to the user's alignment.
COT	String	Class of trade for the customer.
ID	String	Customer ID.
Address	String	City, state, and zip code of the customer.
Zip	Text box	Searches for customers based on zip code.

Table 10-14: Select Customer Dialog Box Search Results (Continued)

Name	Type	Description
Add	Button	Adds the selected customer to the user's alignment.
Remove	Button	Removes the selected customer from the user's alignment.

10.10.2 Select a Territory Dialog Box

Navigation Path: **Administration** > **Users and Organizations** > **Users** > user *Name* link > **Customer Alignment** > **Territory Alignment** > **Add**

The Select a Territory dialog box lets you select a territory from a hierarchical view of all territories in the Model N system.

10.11 Associated Organizations Page

Navigation Path: **Administration** > **Users and Organizations** > **Users** > user *Name* link > **Associated Organizations**

The Associated Organizations page lets you manage the organizations associated with the user.

Table 10-15: Associated Organizations Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Select an Organization dialog box to let you add new organizations directly to this user or group.
Unassociate	Button	Removes the association for the organization.
Reassociate	Button	Opens the Select Organization dialog box where you can move the association for the selected organization to another specified organization.
ID	Text box	Lets you search for organizations names with the supplied criteria.

Table 10-15: Associated Organizations Page (Continued)

Name	Type	Description
Name	Text box	Lets you search for organization names with the supplied criteria.
Inherited from Org	Drop-down list	Lets you search for organizations with the selected organization inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
ID	String	The Model N system ID for this organization.
Name	String	The name of the organization associated with this user or group.
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization or if it is a direct association. Options are: • **Child:** organization is directly associated with a descendant of the current organization. • **Direct:** organization is directly associated to this customer. • **Parent:** organization is associated with a ancestor of the current organization. • **Unassociated:** organization is not currently associated, either directly or inherently, with the organization.

10.12 Extended Attributes Page

Navigation Path: **Administration > Users and Organizations > Users >** group *Name* link **> Extended Attributes**

The Extended Attributes page lets you to view and modify the values of the custom attributes added to a user or group. By default, you will see a blank page. The fields visible on this page depend on the custom attributes added in the FGO file. Note that the custom attributes are non-amending and cannot be edited after the contract is implemented.

10.13 Group Contains Page

Navigation Path: **Administration > Users and Organizations > Users >** group *Name* link **> Users and Groups**

The Contains page provides a view of the users and groups that are contained within the selected group.

Table 10-16: Group Contains Page

Name	Type	Description
Name	Text box	The name of the member users or groups.
ID	Text box	The ID for the member users or groups.
Title	Text box	The title of the user member.
Type	String	The member type. Options are: • User • Group

10.14 Part of Page

Navigation Path: **Administration > Users and Organizations > Users >** group ***Name*** link **> Related Items > Parent Groups**

The Part of page provides a view of the groups that contain the selected group.

Table 10-17: Part of Page

Name	Type	Description
Add	Button	Lets you add a new staff member to the parent group. Opens the Select a Staff Member dialog box.
Name	Text box	The name of the parent group.
ID	Text box	The ID for the parent group.
Description	Text box	The description of the parent group.

10.14.1 Select a Staff Member Dialog Box

Navigation Path: **Administration > Users and Organizations > Users >** group ***Name*** link **> Related Items > Parent Groups>**Add

The Select a Staff Member dialog box lets you select users or groups to the parent group.

Table 10-18: Select a Staff Member Dialog Box

Name	Type	Description
Look in	Drop-down list	List of folders in which to look for user information.
Back	Button	Takes you to the previous folder used in the **Look in** field.
Up	Button	Takes you to the level above the current folder in the **Look in** field.
Search	Button	Performs a search with the supplied criteria.
Browse	Button	Lets you search for a folder on your system.
Search		
First Name	Text box	Lets you search by the first name of a user in the Model N system.
Last Name	Text box	Lets you search by the last name of a user in the Model N system.
ID	Text box	Lets you search by the user ID of a user in the Model N system.
Type	Drop-down list	Lets you limit your search to either users or groups.
Search	Button	Performs the search for a staff member with the supplied criteria.
Clear	Button	Clears the search criteria.
Results and Selected Items		
Name	Link	First and last name of the user or group. Click this link to let it be added.
ID	String	The Model N user ID for the user or group.
Type	String	Identifies the item as a user or a group.
E-mail	String	E-mail address for the specified user or group.

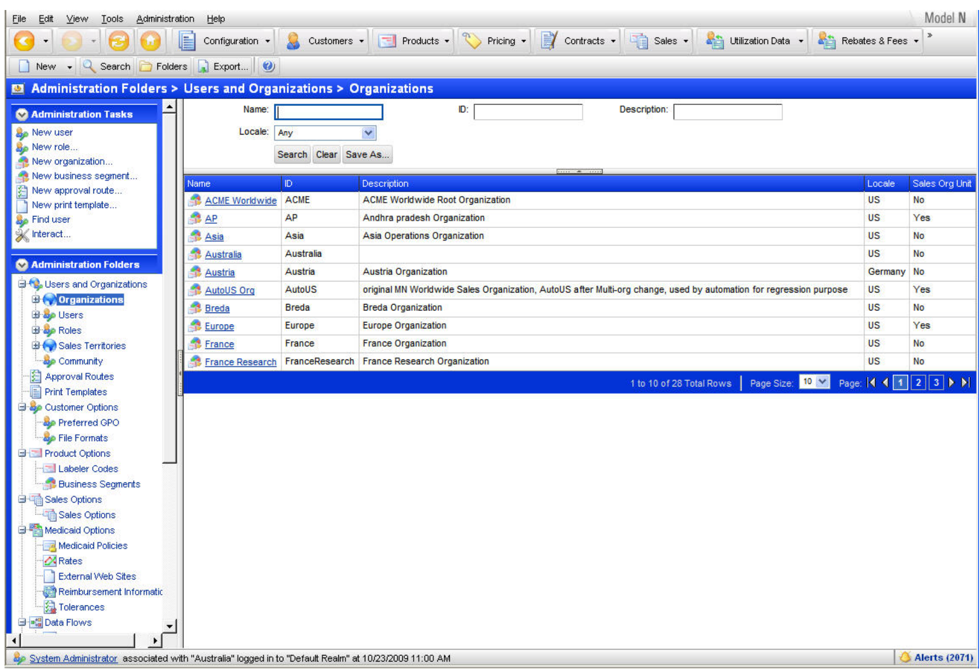
Table 10-18: Select a Staff Member Dialog Box (Continued)

Name	Type	Description
Add	Button	Lets you add selected items from the search results.
Remove	Button	Lets you remove items from the Selected Items list.
Actions		
OK	Button	Saves the changes made and closes the dialog box.
Cancel	Button	Closes the dialog box without accepting any changes made.

10.15 Organizations Search and List View Page

Navigation Path: **Administration > Users and Organizations > Organizations**

Figure 10-1: Organizations Page



The Search and List view page displays the configured Model N system organizations.

Table 10-19: Organizations Search Panel and Results

Name	Type	Description
Search		

Table 10-19: Organizations Search Panel and Results (Continued)

Name	Type	Description
Name	Text box	Limits the search results to Model N system organizations that match the search criteria.
ID	Text box	ID of the Model N system organization.
Description	Text box	Limits the search based on the description of the organization.
Locale	Drop-down list	Limits the search based on the locale associated with the organization.
Search	Button	Searches for organizations that match the specified criteria.
Clear	Button	Clears the search criteria.
Save As	Button	Saves the search criteria to the Saved Searches folder for future use.
Results		
Name	Link	The organization name.
ID	String	The system ID of the organization.
Description	String	A description of the organization.
Locale	String	The locale to which the organization is associated.
Sales Org Unit	String	Whether or not the organization is marked as a sales organization.

10.15.1 Add Organization Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > New organization**

The Add Organization dialog box lets you create new organizations.

Table 10-20: Add Organization Dialog Box

Name	Type	Description
Organization Name *	Text box	The name of the organization.

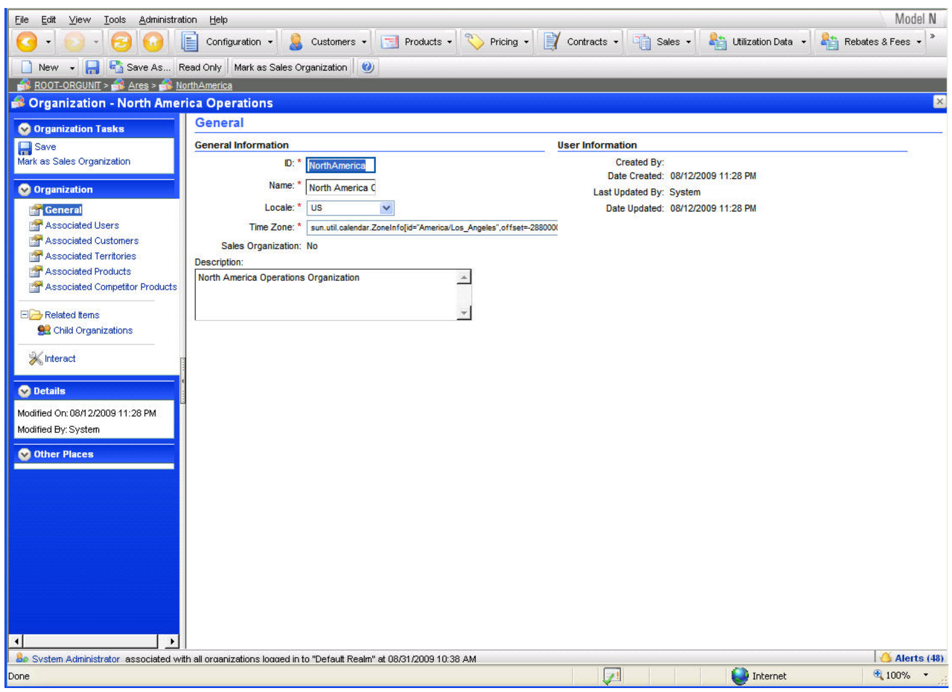
Table 10-20: Add Organization Dialog Box (Continued)

Name	Type	Description
Parent Organization *	String/ Organization Selector	Opens the Select an Organization dialog box.

10.16 Organization General Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link

Figure 10-2: Organization General Page



The General page provides organization information such as name and locale.

Table 10-21: Organization General Page

Name	Type	Description
General Information		
ID *	Text box	The system ID for the organization.
Name *	Text box	The name of the organization.

Table 10-21: Organization General Page (Continued)

Name	Type	Description
Locale *	Drop-down list	The locale to associate to the organization.
Time Zone *	Drop-down list	The time zone of the organization.
Sales Organization	Drop-down list	Indicates whether or not the organization is marked as a sales organization.
Description	Text box	A description of the organization.
User Information		
Created By	String	The user that created the organization within the Model N system.
Date Created	Date	The date the organization was created within the Model N system.
Last Updated By	String	The last user to modify the organization information.
Date Updated	Date	The date when the organization was last updated.

10.16.1 Organization Navigation Panel

The navigation panel contains links to basic tasks and documents for this area. The links are dynamic and depend on the area in which you are working and the status of the document you are working on. Refer to the following table for a complete list of links available.

Table 10-22: Organization Navigation Panel

Navigation Panel	Link	Description
Organization Tasks		

Table 10-22: Organization Navigation Panel (Continued)

Navigation Panel	Link	Description
	Save	Saves the updated page.
	Mark as Sales Organization	Performs a check to make sure that any ancestor or descendant organization nodes are not already sales organizations. If there are, then this returns an error with the message, “This organization cannot be marked as a Sales Organization because there exists a parent or child organization that is a Sales Organization”. If there aren't, then this is marked as a Sales Organization.
	Unmark as Sales Organization	Opens a dialog box that states “This will remove all customer associations to this organization. Do you wish to continue?”. If the user clicks OK, then a check is performed to look for any customers that are only associated to this organization. If there are, then an error message is raised that says “This organization cannot be unmarked as a Sales Organization until all customers are associated with other Sales Organizations”. If there aren't, then any customer associations to this organization are removed and the organization is unmarked as a Sales Organization.
Organization Folders		
	General	Opens the Organization General Page.
	Associated Users	Opens the Associated Users Page.
	Associated Customers	Opens the Associated Customers Page.
	Associated Territories	Opens the Associated Territories Page.
	Associated Products	Opens the Associated Products Page.
	Associated Competitor Products	Opens the Associated Competitor Products Page.
Related Items		
	Child Organizations	Opens the Child Organizations page.

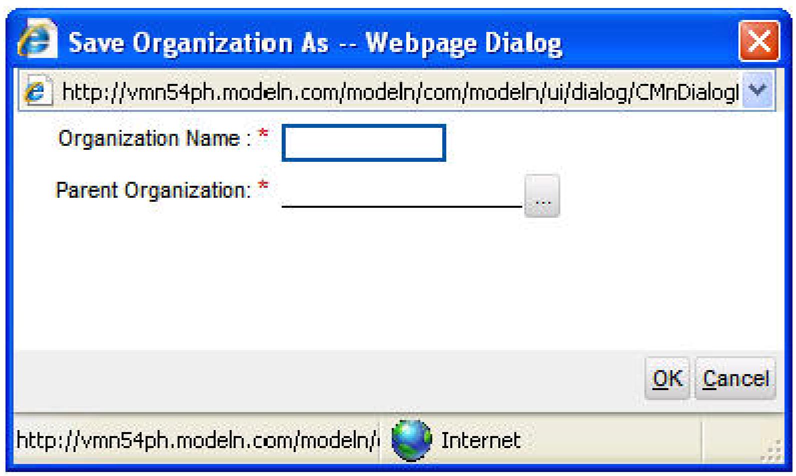
Table 10-22: Organization Navigation Panel (Continued)

Navigation Panel	Link	Description
	Interact	Provides access to the Model N expression language.

10.16.2 Save Organization As Dialog Box

Navigation Path: **Administration** > **Users and Organizations** > **Organizations** > *Name* link > **Save As**

Figure 10-3: Save Organization As Dialog Box



The Save Organization As dialog box lets you enter the name of the new organization and the parent organization to clone an existing organization.

When the organization is cloned, all of the attributes on the source organization are cloned onto the target organization, except for the Name, ID, and Description.

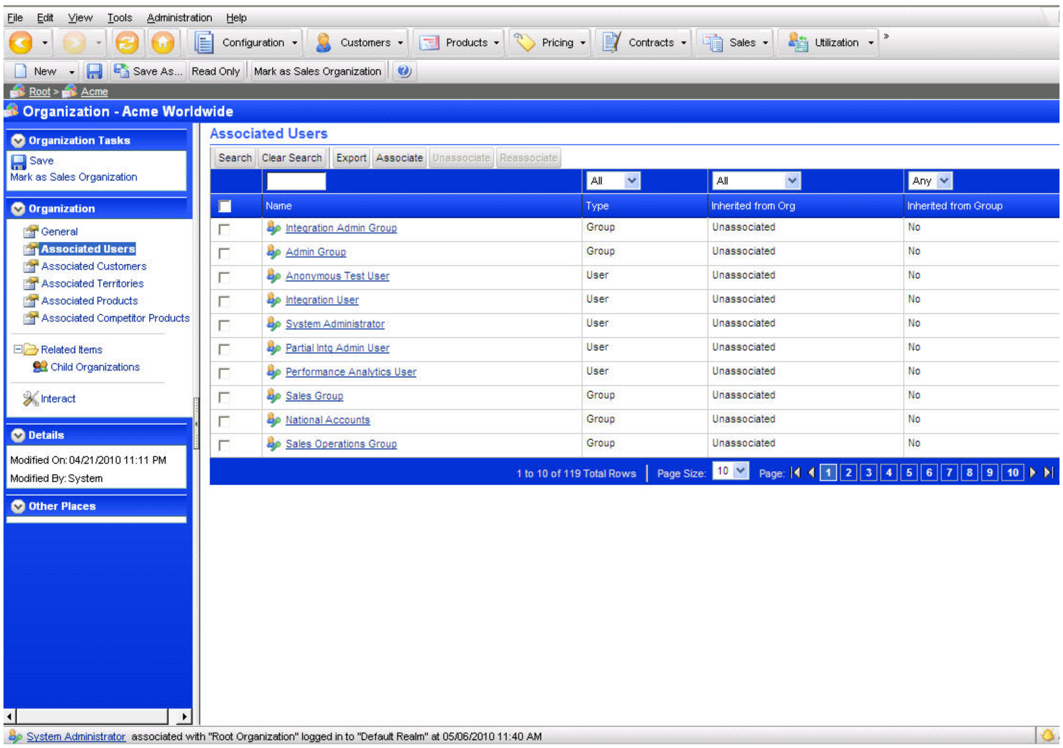
Table 10-23: Save Organization As Dialog Box

Name	Type	Description
Organization Name *	Text box	The name of the organization.
Parent Organization *	String/ Organization Selector	Opens the Select an Organization dialog box.

10.17 Associated Users Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Users**

Figure 10-4: Associated Users Page



The Associated Users page provides the list of users are groups that are associated to this organization.

Table 10-24: Associated Users Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export Dialog Box to let you export the search results.
Associate	Button	Opens the Select a Staff Member Dialog Box to let you add new users or groups directly to this organization.

Table 10-24: Associated Users Page (Continued)

Name	Type	Description
Unassociate	Button	Removes the association for the selected users or groups. If the default organization of any user will be unavailable due to this action, then the specified default organization will be set on those updated users.
Reassociate	Button	Opens the Select an Organization Dialog Box where you can move the association for the selected users or groups to another specified organization.
Name	Text box	Lets you search for user names with the supplied criteria.
Type	Drop-down list	Lets you search for users of a selected type. Options are Users or Groups.
Inherited from Org	Drop-down list	Lets you search for users with the selected organization inheritance criteria.
Inherited from Group	Drop-down list	Lets you search for users with the selected group inheritance criteria.
Results		
[check box]	Check box	Enables the **Unassociate** and **Reassociate** buttons for the rows where this is selected.
Name	Link	Opens the user's Profile Page.
Type	String	Indicates if the associated item is a user or group.
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the user or group listed is associated. Options are: • **Child:** user or group is directly associated with a descendant of the current organization. • **Direct:** user or group is directly associated to this organization. • **Parent:** user or group is associated with a ancestor of the current organization. • **Unassociated:** user or group is not currently associated, either directly or inherently, with the organization.

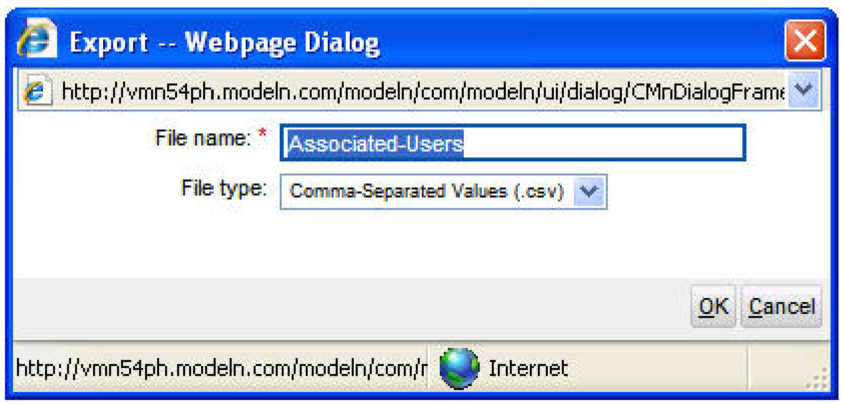
Table 10-24: Associated Users Page (Continued)

Name	Type	Description
Inherited from Group	String	Indicates whether or not the association was inherited from a group to which the user or group is associated.

10.17.1 Export Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Users > Export**

Figure 10-5: Export Dialog Box



The Export dialog box lets you save the search results to a file.

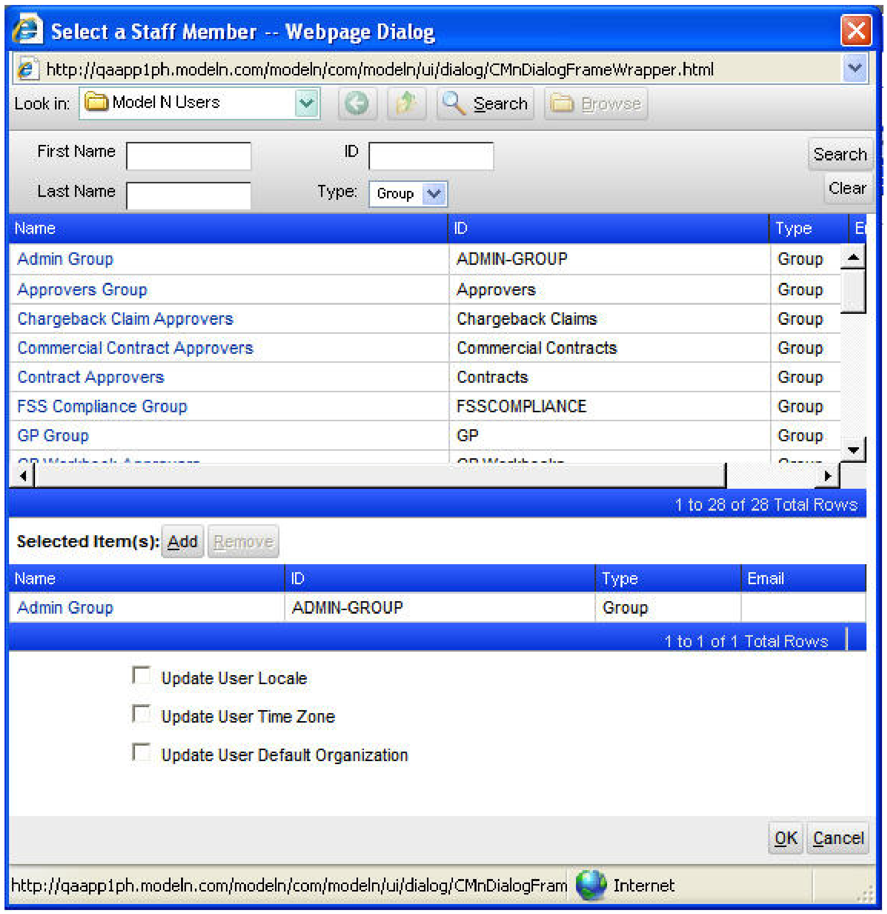
Table 10-25: Export Dialog Box

Name	Type	Description
File name *	Text box	The name of the file you are creating for the exported results.
File type	Drop-down list	The type of format you want the content exported to. Option are: • Comma-separated values (.csv0 • Rich text format (.rtf)
OK	Button	Exports the search results to the file.
Cancel	Button	Cancels the exporting of the search results.

10.17.2 Select a Staff Member Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Users > Associate**

Figure 10-6: Select a Staff Member Dialog Box



The Select a Staff Member dialog box lets you select users or groups to associate to an organization.

Table 10-26: Select a Staff Member Dialog Box

Name	Type	Description
Look in	Drop-down list	List of folders in which to look for user information.
Back	Button	Takes you to the previous folder used in the **Look in** field.

Table 10-26: Select a Staff Member Dialog Box (Continued)

Name	Type	Description
Up	Button	Takes you to the level above the current folder in the **Look in** field.
Search	Button	Performs a search with the supplied criteria.
Browse	Button	Lets you search for a folder on your system.
Search		
First Name	Text box	Lets you search by the first name of a user in the Model N system.
Last Name	Text box	Lets you search by the last name of a user in the Model N system.
ID	Text box	Lets you search by the user ID of a user in the Model N system.
Type	Drop-down list	Lets you limit your search to either users or groups.
Search	Button	Performs the search for a staff member with the supplied criteria.
Clear	Button	Clears the search criteria.
Results and Selected Items		
Name	Link	First and last name of the user or group. Click this link to let it be added.
ID	String	The Model N user ID for the user or group.
Type	String	Identifies the item as a user or a group.
E-mail	String	E-mail address for the specified user or group.
Add	Button	Lets you add selected items from the search results.
Remove	Button	Lets you remove items from the Selected Items list.
Options		
Update Locale	Check box	Users and groups will have their locale updated from the new organization.
Update Time Zone	Check box	Users and groups will have their Time Zone updated from the new organization.

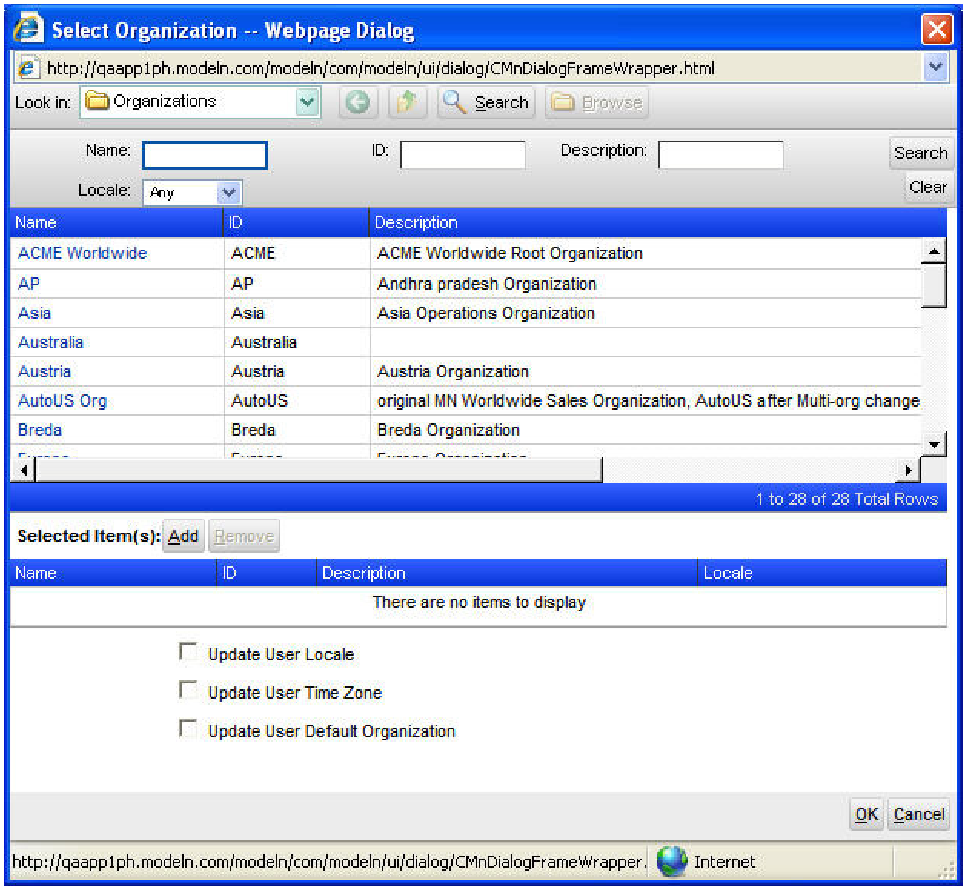
Table 10-26: Select a Staff Member Dialog Box (Continued)

Name	Type	Description
Update Default Organization	Check box	The default organization of the selected users (not groups) will be modified with the current organization.
OK	Button	Saves the changes made and closes the dialog box.
Cancel	Button	Closes the dialog box without accepting any changes made.

10.17.3 Select an Organization Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Users > Reassociate**

Figure 10-7: Select an Organization Dialog Box



The Select an Organization dialog box lets you move the association for the selected users or groups to another specified organization.

Table 10-27: Select an Organization Dialog Box

Name	Type	Description
Look in	Drop-down list	List of folders in which to look for organization information.
Back	Button	Takes you to the previous folder used in the **Look in** field.
Up	Button	Takes you to the level above the current folder in the **Look in** field.

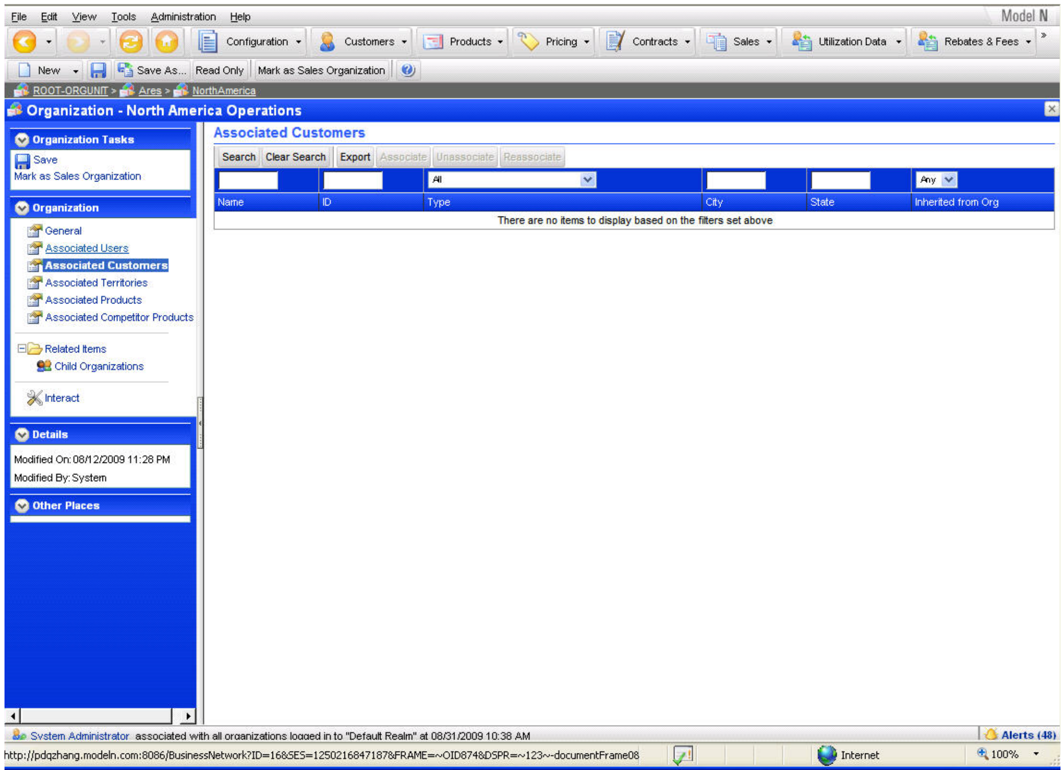
Table 10-27: Select an Organization Dialog Box (Continued)

Name	Type	Description
Search	Button	Performs a search with the supplied criteria.
Browse	Button	Lets you search for a folder on your system.
Results and Selected Items		
Name	Link	Name of the organization. Clicking on this link selects it to be added or removed.
ID	String	The Model N ID for the organization.
Description	String	E-mail address for the specified user or group.
Locale	String	Locale for the specified organization.
Add	Button	Lets you add selected items from the search results.
Remove	Button	Lets you remove items from the Selected Items list.
Add	Button	Lets you add selected items from the search results.
Remove	Button	Lets you remove items from the Selected Items list.
Options		
Update Locale	Check box	Organizations will have their locale updated from the new organization.
Update Time Zone	Check box	Organizations will have their Time Zone updated from the new organization.
Update Default Organization	Check box	The default organization of the selected users (not groups) will be modified with the current organization.
OK	Button	Saves the changes made and closes the dialog box.
Cancel	Button	Closes the dialog box without accept any changes made.

10.18 Associated Customers Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Customers**

Figure 10-8: Associated Customers Page



The Associated Customers Page lets you manage the customers associated with an organization.

Table 10-28: Associated Customers Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Select Customer dialog box to let you add new customers directly to this organization.

Table 10-28: Associated Customers Page (Continued)

Name	Type	Description
Unassociate	Button	Removes the association for the selected users or groups. If the default organization of any user will be unavailable due to this action, then the specified default organization is set on those updated users.
Reassociate	Button	Opens the Select an Organization dialog box where you can move the association for the selected users and groups to another specified organization.
Name	Text box	Lets you search for customer names with the supplied criteria.
ID	Text box	Lets you search for customer IDs with the supplied criteria.
Type	Drop-down list	Lets you search for customers of a selected type.
City	Text box	Lets you search for customers by city.
State	Text box	Lets you search for customers by state.
Country	Text box	Lets you search for customers by country.
Inherited from Org	Drop-down list	Lets you search for customers with the selected organization inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
Name	String	The name of the customer associated with this organization.
ID	String	The Model N system ID for this customer.

Table 10-28: Associated Customers Page (Continued)

Name	Type	Description
Type	String	The type of customer. Options are: • Affiliated Group • Book of Business • Department • GPO • Health System • Independent • Medicaid Payee • Medicaid State • Pharmacy Benefit Manager • Plan • Sponsor • Wholesaler
City	String	The city in which the customer is located.
State	String	The state in which the customer is located.
Country	String	The country in which the customer is located.
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the customer listed is associated. Options are: • **Child:** customer is directly associated with a descendant of the current organization. • **Direct:** customer is directly associated to this organization. • **Parent:** customer is associated with a ancestor of the current organization. • **Unassociated:** customer is not currently associated, either directly or inherently, with the organization.

10.18.1 Select Customer Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Customers > Associate**

10.18.2 Select Organization Dialog Box

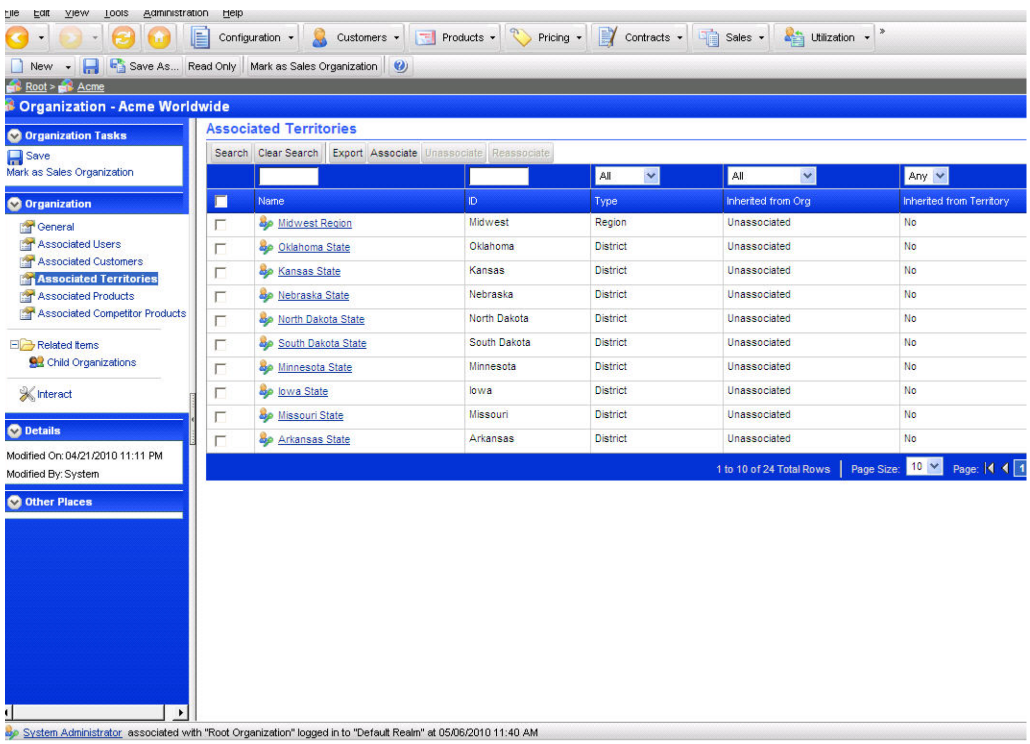
Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Customers >Reassociate**

This dialog box is similar to Select an Organization Dialog Box on page 92 except it does not have the options at the bottom of the dialog box.

10.19 Associated Territories Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Territories**

Figure 10-9: Associated Territories Page



On the Associated Territories Page, you can manage the territories associated with an organization.

Table 10-29: Associated Territories Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.

Table 10-29: Associated Territories Page (Continued)

Name	Type	Description
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Select a Territory dialog box to let you add new users or groups directly to this organization.
Unassociate	Button	Removes the association for the selected users or groups. If the default organization of any user will be unavailable due to this action, then the specified default organization is set on those updated users.
Reassociate	Button	Opens the Select an Organization dialog box where you can moves the association for the selected users and groups to another specified organization.
Name	Text box	Lets you search for territory names with the supplied criteria.
ID	Text box	Lets you search for territory IDs with the supplied criteria.
Type	Drop-down list	Lets you search for territories of a selected type.
Inherited from Org	Drop-down list	Lets you search for territories with the selected organization inheritance criteria.
Inherited from Territory	Drop-down list	Lets you search for territories with the selected territory inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
Name	String	The territory name.
ID	String	The system ID of the territory
Type	String	The type of territory. Options are Region or District.

Table 10-29: Associated Territories Page (Continued)

Name	Type	Description
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the territory listed is associated. Options are: • **Child:** territory is directly associated with a descendant of the current organization. • **Direct:** territory is directly associated to this organization. • **Parent:** territory is associated with a ancestor of the current organization. • **Unassociated:** territory is not currently associated, either directly or inherently, with the organization.
Inherited from Territory	String	Whether or not the association was inherited from a territory.

10.19.1 Select a Territory Dialog Box

Navigation Path: **Administration** > **Users and Organizations** > **Organizations** > **Name** link > **Associated Territories** > **Associate**

10.19.2 Select Organization Dialog Box

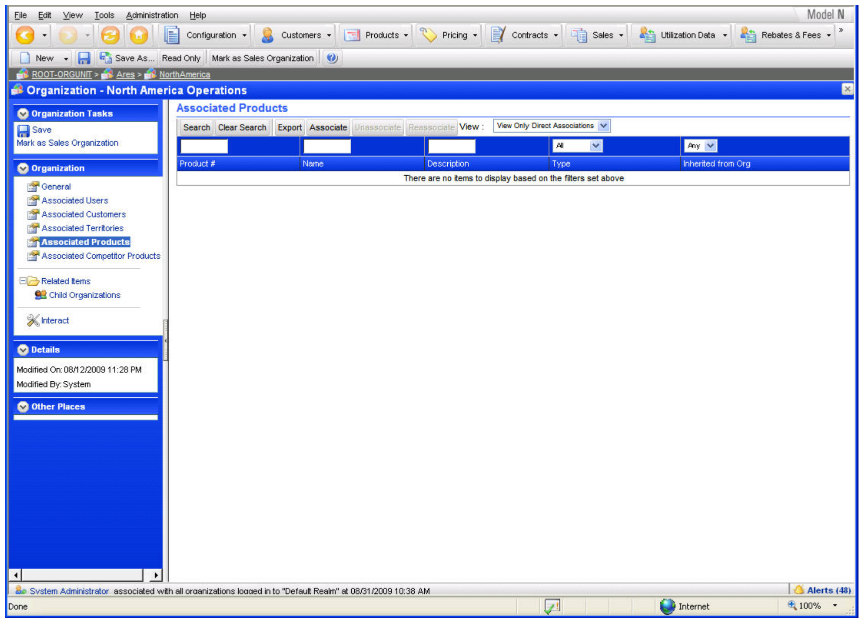
Navigation Path: **Administration** > **Users and Organizations** > **Organizations** > **Name** link > **Associated Territories** >**Reassociate**

This dialog box is similar to Select an Organization Dialog Box on page 92, except it does not have the options at the bottom of the dialog box.

10.20 Associated Products Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Products**

Figure 10-10: Associated Products Page



The Associated Products page lists products associated with the selected organization.

Table 10-30: Associated Products Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Add Product Catalog/Items dialog box to let you add new products directly to this organization.
Unassociate	Button	Removes the association for the selected users or groups. If the default organization of any user will be unavailable due to this action, then the specified default organization is set on those updated users.

Table 10-30: Associated Products Page (Continued)

Name	Type	Description
Reassociate	Button	Opens the Select an Organization dialog box where you can moves the association for the selected users and groups to another specified organization.
Product #	Text box	Lets you search for product numbers with the supplied criteria
Name	Text box	Lets you search for product names with the supplied criteria.
Description	Text box	Lets you search for product descriptions with the supplied criteria
Type	Drop-down list	Lets you search for products of a selected type.
Inherited from Org	Drop-down list	Lets you search for products with the selected organization inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
Product #	String	The product number.
Name	String	The product name.
Description	String	A description of the product.
Type	String	The type of product.
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the product listed is associated. Options are: • **Child:** product is directly associated with a descendant of the current organization. • **Direct:** product is directly associated to this organization. • **Parent:** product is associated with a ancestor of the current organization. • **Unassociated:** product is not currently associated, either directly or inherently, with the organization.

10.20.1 Add Product Catalog/Items Dialog Box

Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Products > Associate**

10.20.2 Select Organization Dialog Box

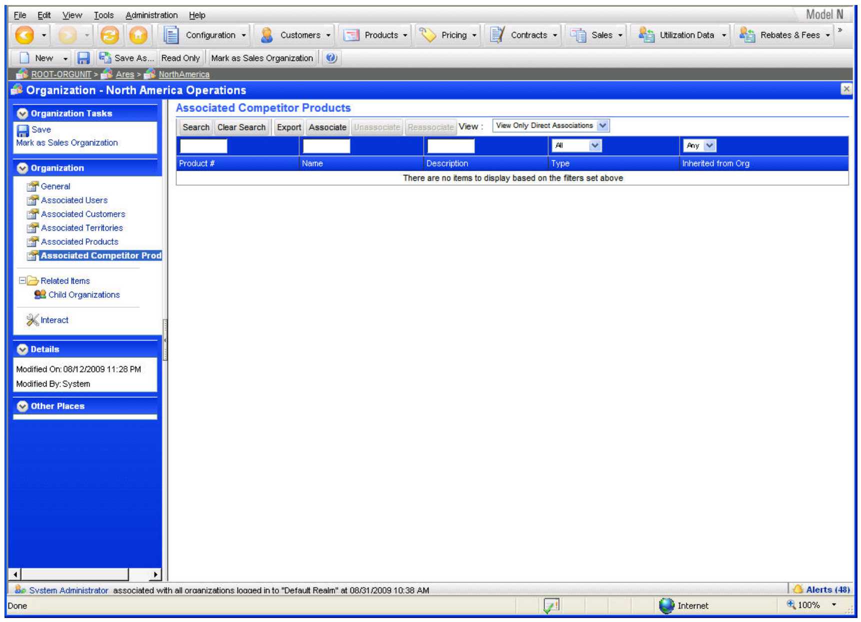
Navigation Path: **Administration > Users and Organizations > Organizations > Name** link **> Associated Products >Reassociate**

This dialog box is similar to Select an Organization Dialog Box on page 92, except it does not have the options at the bottom of the dialog box.

10.21 Associated Competitor Products Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Competitor Products**

Figure 10-11: Associated Competitor Products Page



The Associated Competitor Products page lists competitor products associated with the selected organization. This is not available in Medical Device installations.

Table 10-31: Associated Competitor Products Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Add Product Catalog/Items dialog box to let you add new products directly to this organization.

Table 10-31: Associated Competitor Products Page (Continued)

Name	Type	Description
Unassociate	Button	Removes the association for the selected users or groups. If the default organization of any user will be unavailable due to this action, then the specified default organization is set on those updated users.
Reassociate	Button	Opens the Select an Organization dialog box where you can moves the association for the selected users and groups to another specified organization.
Product #	Text box	Lets you search for product numbers with the supplied criteria
Name	Text box	Lets you search for product names with the supplied criteria.
Description	Text box	Lets you search for product descriptions with the supplied criteria
Type	Drop-down list	Lets you search for products of a selected type.
Inherited from Org	Drop-down list	Lets you search for products with the selected organization inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
Product #	String	The product number.
Name	String	The product name.
Description	String	A description of the product.
Type	String	The type of product.

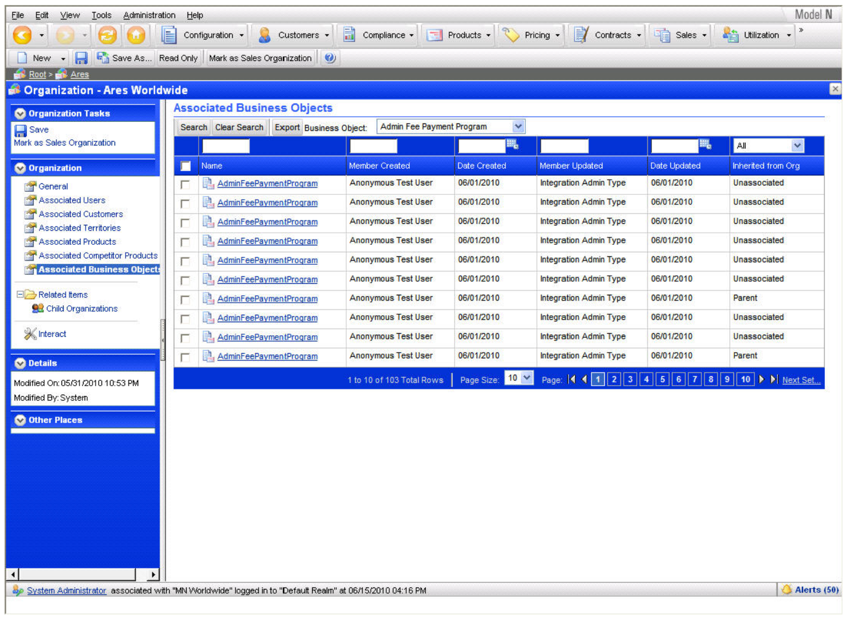
Table 10-31: Associated Competitor Products Page (Continued)

Name	Type	Description
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the product listed is associated. Options are: • **Child:** product is directly associated with a descendant of the current organization. • **Direct:** product is directly associated to this organization. • **Parent:** product is associated with a ancestor of the current organization. • **Unassociated:** product is not currently associated, either directly or inherently, with the organization.

10.22 Associated Business Objects Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Associated Business Objects**

Figure 10-12: Associated Business Objects Page



The Associated Business Objects page lists Model N business objects associated with the selected organization.

Table 10-32: Associated Business Objects Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Business Object	Drop-down list	Lets you restrict your search to a certain type of business object. A search cannot be performed without a business object type selection.
Name	Text box	Lets you search for business objects with the supplied criteria.

Table 10-32: Associated Business Objects Page (Continued)

Name	Type	Description
Created By	Text box	Lets you search for user that created the object with the supplied criteria
Date Created	Date	Lets you search for the date on which the business object was created.
Updated By	Text box	Lets you search for business objects last updated by the supplied criteria.
Date Updated	Date	Lets you search for business objects last updated on the supplied criteria.
Inherited from Org	Drop-down list	Lets you search for business object with the selected organization inheritance criteria.
Results		
Name	Link/String	The business object name.
Created By	String	Who created the business object.
Date Created	String	When the business object was created.
Updated By	String	Who last updated the business object.
Date Updated	String	When the business object was last updated.
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization to which the product listed is associated. Options are: • **Child:** business object is directly associated with a descendant of the current organization. • **Direct:** business object is directly associated to this organization. • **Parent:** business object is associated with a ancestor of the current organization. • **Unassociated:** business object is not currently associated, either directly or inherently, with the organization.

10.23 Extended Attributes Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Extended Attributes**

The Extended Attributes page lets you to view and modify the values of the custom attributes added to an organization. By default, you will see a blank page. The fields visible on this page depend on the custom attributes added in the FGO file. Note that the custom attributes are non-amending and cannot be edited after the contract is implemented.

10.24 Child Organizations Page

Navigation Path: **Administration > Users and Organizations > Organizations >** *Name* link **> Related Items > Child Organizations**

Table 10-33: Child Organizations Page

Name	Type	Description
Name	Link	Opens the Organization General page for the child organization.
Description	String	The description of the organization.
Locale	String	The locale for the organization.
Sales Org Unit	String	Indicates if the child organization is marked as a sales organization.

10.25 Roles Page

Navigation Path: **Administration > Users and Organizations > Roles**

The Roles page displays a list of available user roles in the system and lets you assign those roles to the currently selected user. See the *User Roles & Access Controls* guide for access permissions of the roles.

10.25.1 Roles Search Panel

To search for a specific role, enter your search criteria in the search fields at the top of the page and click the Search button.

Table 10-34: Roles Search Panel and Results

Name	Type	Description
Search		

Table 10-34: Roles Search Panel and Results (Continued)

Name	Type	Description
Type	Drop-down list	Limits the search to individual role types or role group types.
Display Name	Text box	Limits the search results to the supplied display name for a roles or role group. The search is case sensitive and character strings must match precisely.
Assigned User/Group	Text box/Staff Member selector	Opens the Select a Staff Member dialog box to specify a user or group as part of the search criteria.
Associated Resource	Text box	Limits the search to roles that have the specified resource available under Access Rules.
Search	Button	Searches for roles that match the specified criteria.
Clear	Button	Clears the search criteria.
Save As	Button	Saves the search criteria to the Saved Searches folder for future use.
Results		
[check box]	Check box	Lets you select a role to be copied or deleted.
Name	Link	Name of the role. The name is a link to the General page.
Display Name	String	User-friendly name of the role.
Type	String	Specifies if it is a role or role group.

10.25.2 Roles Toolbar

Navigation Path: **Administration > Users and Organizations > Roles**

The tool bar contains buttons for basic tasks, some of which are duplicated in the Tasks list in the navigation panel. The availability of the buttons and tasks depends on the area in which you are working, your user role, and the status of the document you are working on. Refer to the following table for a complete list of buttons on the Roles tool bar.

Table 10-35: Roles Tool bar

Button	Description
New	Lets you create a new role or role group.

Table 10-35: Roles Tool bar (Continued)

Button	Description
Search	Searches for roles that match the specified criteria.
Folders	Displays the hierarchical folders of role groups.
Export Role Definition	Lets you export the role/group and access rule resulting from a search to a .csv file.
Import Role Definition	Lets you import a role or group and access rules. The default option is create new roles and if those roles already exist, error messages are displayed. If 'AllowedOpt' and 'All' are added as the first line of .csv file uploaded, the option is both create and update
Help (?)	Provides access to the user documentation (user and reference guides). User documentation is also available from the Help menu.

10.25.3 Export Search Result Dialog Box

Navigation Path: **Administration > Users and Organizations > Roles > Export**

The Export Search Result dialog box resulting from clicking the **Export** button on the tool bar lets you save your search results to a .csv or .rtf file.

Table 10-36: Export Search Result Dialog Box

Name	Type	Description
File Name	Text box	Lets you enter a name for the file of exported search results.
File Type	Drop-down list	Lets you select the file type for the exported search results. The options available are: • Comma-Separated Values (.csv) • Rich Text Format (.rtf)

10.26 Role Profile Page

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link

.

Table 10-37: Role Profile Page

Name	Type	Description
Name *	Text box	Name of the role.
Display Name*	Text box	User-friendly name of the role.
Parent *	Text box/ Group selector	Opens the Select a Group dialog box where you can choose a role group as a parent object.

10.27 Associated Users and Groups Page

Navigation Path: **Administration > Users and Organizations > Roles > Name** link **> Users and Groups**

The Associated Users and Groups Page lets you view the users and groups associated with this role.

Table 10-38: Associated Users and Groups Page

Name	Type	Description
Add	Button	Lets you associate a user or user group to this role.
Delete	Button	Lets you remove the selected user or group from this role.
[checkbox]	Check box	Enables the delete functionality.
Name	Link	The user name associated with this role.
ID	String	The Model N system ID for this user.
Type	String	Indicates whether this is a user or user group.

10.28 Access Rules Page

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link **> Access Rules**

The Access Rules page indicate

Table 10-39: Access Rules Page

Name	Type	Description
Add	Button	Lets you associate access rules to this role.
Delete	Button	Lets you remove the selected access rules from this role.
[check box]	Check box	Enables the delete functionality.
Resource	String	The access rule resource name.
Resource Description	String	The description of the access rule resource.
Action	String	The action defined for the specified access rule for this role.
Rule Type	String	The rule applied to this action.

10.29 Associated Capabilities Page

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link **> Capabilities**

The Capabilities page lets you define more fine-grained access controls for certain applications in the Model N application suite. As of Model N release 5.5, this only applies to the Sales application.

Table 10-40: Capabilities Page

Name	Type	Description
Add	Button	Opens the Add Capability dialog box where you can add capabilities to this role.
Delete	Button	Lets you delete selected capabilities.
[check box]	Check box	Lets you select capabilities to be deleted.
Module	String	The application or module in the Model N application suite where the capability applies.

Table 10-40: Capabilities Page (Continued)

Name	Type	Description
Capability	String	A fine-grained rule allowing a single action to be performed, or a single type of thing to be viewed.
Description	String	The description of that capability.

10.29.1 Add Capability Dialog Box

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link **> Capabilities > Add**

The Add Capabilities dialog box lets you define more fine-grained access controls for certain applications in the Model N application suite. As of Model N release 5.5, this only applies to the Sales application.

Table 10-41: Add Capability Dialog Box

Name	Type	Description
Module	String	The application or module in the Model N application suite where the capability applies.
Capability	String	A fine-grained rule allowing a single action to be performed, or a single type of thing to be viewed.
Description	String	The description of that capability.
OK	Button	Adds the capability.to the user role.
Cancel	Button	Closes the dialog box without adding the capability.

10.30 Extended Attributes Page

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link **> Extended Attributes**

The Extended Attributes page lets you to view and modify the values of the custom attributes added to a sales territory. By default, you will see a blank page. The fields visible on this page depend on the custom attributes added in the FGO file. Note that the custom attributes are non-amending and cannot be edited after the contract is implemented.

10.31 Interact Page

Navigation Path: **Administration > Users and Organizations > Roles >** *Name* link **> Interact**

10.32 Sales Territories Page

The Sales Territory pages enable you to search and view customer organizations and groups in the Model N community. You can search for customers using a number of parameters, including, but not limited to the customer number, the customer name, and the location (sub-string query).

You can import sales territory alignment with inbound data flows and then view the structure of an organization from the Sales Territories pages. Territory structures are often geographic hierarchical groupings created to allow the sales force to manage accounts efficiently. Staff members can be assigned to any node in the structure, and these alignments can be modified over time. Visibility rules and document approval routes are dynamically determined based on the staff and customer territory alignment information.

The Sales Territory pages enable you to search and view customer organizations and groups in the Model N community. You can search for customers using a number of parameters, including, but not limited to the customer number, the customer name, and the location (sub-string query).

10.32.1 Sales Territories Search and List View

Navigation Path: **Administration > Users and Organizations > Sales Territories**

The Search and List View page displays a list of territories that are stored in the Model N system, including territory ID and territory type.

10.32.2 Search Panel

Navigation Path: **Administration > Users and Organizations > Sales Territories**

To search for a specific customer account or a group of accounts, enter your search criteria in the search fields at the top of the page, and then click the Search button to display the results.

Table 10-42: Sales Territories Search Panel and Results

Name	Type	Description
Name	Text box	Limits the search results to territories that match the search criteria. The search is case sensitive and character strings must match precisely. For example, “San” or “Barb” will match Santa Barbara but “San Bar” will not.
	Link	Name of the territory, District, or Region. The name is a link to the General page.
Number/ID	String/Text box	Limits the search results to accounts that match the search criteria.
	String	ID of the territory, region, or district.
Type	Drop-down list	Filters by territory type. Options are: • All (Default) • District • Region • Territory
	String	Type of object, for example, District.

10.33 Sales Territories Detail Pages

10.33.1 Sales Territories Toolbar

Navigation Path: **Administration > Users and Organizations > Sales Territories**

The tool bar contains buttons for basic tasks, some of which are duplicated in the Tasks list in the navigation panel. The availability of the buttons and tasks depends on the area in which you are working, your user role, and the status of the document you are working on. Refer to the following table for a complete list of buttons on the Sales Territories tool bar.

Table 10-43: Sales Territories Tool bar

Button	Description
New	Lets you create any one of the following: • New user (default) • New business segment • New approval route • Find user
Search	Searches based on the criteria entered.
Folders	Lets you create new folders under the Sales Territories link.
Export	Launches the Export Search Result dialog box, which lets you export the list of territories to a .csv or .rtf file.
Help (?)	Provides access to the user documentation (user and reference guides). User documentation is also available from the Help menu.

10.33.2 Sales Territories Navigation Panel

Navigation Path: **Administration > Users and Organizations > Sales Territories >** *Name* link

Within the navigation panel, the Sales Territories Tasks and Sales Territories Folders contain links to basic tasks associated with the area in which you are working. The list of links is dynamic, and changes based on the status of the document you are working on.

The following table describes the complete list links available from the Sales Territories detail pages.

Table 10-44: Sales Territories Detail Page Navigation Panel

Navigation Panel	Description
Sales Territories Tasks	
Save	Saves your changes.
Sales Territories Folders	
General	Provides basic information about the territory such as the Territory ID, Name, and Type.
Contains	Territories which are contained within the selected territory.
Customer Alignment	Customers who are aligned to the selected territory.
Staff Alignment	Staff members who are aligned to the selected territory.

10.34 Sales Territories General Page

Navigation Path: **Administration** > **Users and Organizations** > **Sales Territories** > *Name* link

The General page provides territory information such as name and type.

Table 10-45: General Sales Territory Detail Page

Name	Type	Description
ID	Text Box	The ID for the selected territory.
Name	Text Box	The name of the selected territory.
Type	String	The territory type. Options are: • Territory • Region • District

10.35 Associated Organizations Page

Navigation Path: **Administration > Users and Organizations > Sales Territories >** *Name* link **> Associated Organizations**

The Associated Organizations page lets you manage the organizations associated with the sales territory.

Table 10-46: Associated Organizations Page

Name	Type	Description
Search		
Search	Button	Performs the search supplied.
Clear Search	Button	Clears the search criteria specified.
Export	Button	Opens the Export dialog box to let you export the search results.
Associate	Button	Opens the Select an Organization dialog box to let you add new organizations directly to this user or group.
Unassociate	Button	Removes the association for the organization.
Reassociate	Button	Opens the Select Organization dialog box where you can move the association for the selected organization to another specified organization.
ID	Text box	Lets you search for organizations names with the supplied criteria.
Name	Text box	Lets you search for organization names with the supplied criteria.
Inherited from Org	Drop-down list	Lets you search for organizations with the selected organization inheritance criteria.
Results		
[check box]	Check box	Enables the Unassociate and Reassociate buttons for the rows where this is selected.
ID	String	The Model N system ID for this organization.
Name	String	The name of the organization associated with this territory.

Table 10-46: Associated Organizations Page (Continued)

Name	Type	Description
Inherited from Org	String	Indicates whether or not the association to this organization was inherited from another organization or if it is a direct association. Options are: • **Child:** organization is directly associated with a descendant of the current organization. • **Direct:** organization is directly associated to this customer. • **Parent:** organization is associated with a ancestor of the current organization. • **Unassociated:** organization is not currently associated, either directly or inherently, with the organization.

10.36 Extended Attributes Page

Navigation Path: **Administration > Users and Organizations > Sales Territories >** *Name* link **> Extended Attributes**

The Extended Attributes page lets you to view and modify the values of the custom attributes added to a sales territory. By default, you will see a blank page. The fields visible on this page depend on the custom attributes added in the FGO file. Note that the custom attributes are non-amending and cannot be edited after the contract is implemented.

10.37 Sales Territories Contains Page

Navigation Path: **Administration > Users and Organizations > Sales Territories >** *Name* link **> Contains**

The Sales Territories Contains page provides a view of the regions, districts and so on, that are contained within the selected territory.

Table 10-47: Contains Page

Name	Type	Description
Name	Text Box	The name of the selected territory.
ID	Text Box	The ID for the selected territory.

Table 10-47: Contains Page (Continued)

Name	Type	Description
Type	String	The territory type. Options are: • Territory • Region • District

10.38 Customer Alignment Page

Navigation Path: **Administration > Users and Organizations > Sales Territories>** *Name* link **> Customer Alignment**

Figure 10-13: Customer Alignment Page

The Customer Alignment page provides a view of the customers aligned to the selected territory. You can assign new customers to a sales territory structure and override existing alignments.

Table 10-48: Customer Alignment Page

Name	Type	Description
Name	Text Box	The name of the selected customer. Links to the customer Profile page.
ID	Text Box	The customer ID.
Type	String	The customer type. Options are: • GPO • IDN • Independent • Distributor (Wholesaler in Pharma)
City	String	The customer's city information.
State	String	The customer's state information.

10.39 Staff Alignment Page

Navigation Path: **Administration > Users and Organizations > Sales Territories>** *Name* link **> Staff Alignment**

Figure 10-14: Staff Alignment Page

The Staff Alignment page provides a view of the staff members aligned to the selected territory. You can override existing customer-territory alignments.

Table 10-49: Staff Alignment Page

Name	Type	Description
Name	Text Box	The name of the user aligned with this territory. Links to the user Profile page.
ID	Text Box	The staff member's user ID.
Type	String	• The user type.
Aligned To	String	The name of the organization the staff member is aligned to.
Alignment Type	String	The reporting relationship. Options are: • Territory • Region • District

10.40 Community Page

Navigation Path: **Administration > Users and Organizations > Community**

The Community page provides a view of the communities defined within the Model N system.

Table 10-50: Community Search Panel

Name	Type	Description
Search		
Name	Text box	The system name of the community.
Printable Name	Text box	The name of the community.
Description	Text box	A description of the community.

Table 10-50: Community Search Panel (Continued)

Name	Type	Description
Member Subtype	Drop-down list	The member type applied to this community. The default options are: • Any • Alignment Note (AlignmentNode) • Group • Organization (Org) • User Account (UserAcct)
Member Status	Drop-down list	The status of the community. The default options are: • Any • Active • Inactive • Temporary
Community Subtree	Drop-down list	Restricts the search to the specified community area. The default options are: • Any • Alignment • Customer • Role • Staff
Search	Button	Searches for the communities that match the specified criteria.
Clear	Button	Clears the search criteria.
Save As	Button	Saves the search criteria to the Saved Searches folder for future use.
Results		
Name	Link	The system name of the community. Links to the Relationships page.
Printable Name	String	A user-friendly name for the community.
Description	String	A description of the community.

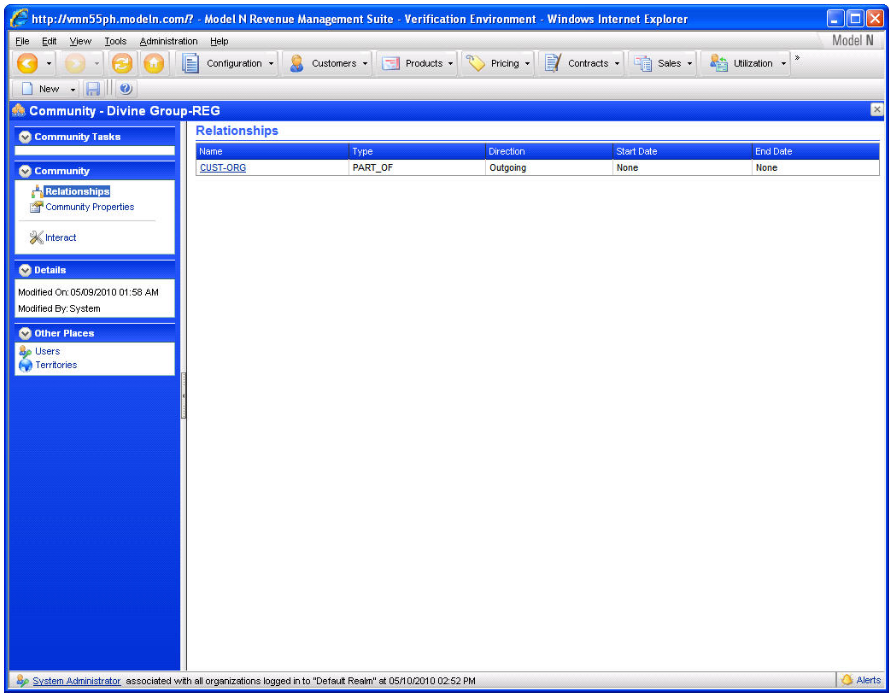
Table 10-50: Community Search Panel (Continued)

Name	Type	Description
Member Subtype	String	The member type applied to this community. The default options are: • Alignment Note (AlignmentNode) • Group • Organization (Org) • User Account (UserAcct)
Status	String	The status of the community. Default values are: • Active • Inactive • Temporary

10.41 Relationships Page

Navigation Path: **Administration > Users and Organizations > Community > Name** link

Figure 10-15: Relationships Page



The Relationships page provides a view of members with relationships to the selected community.

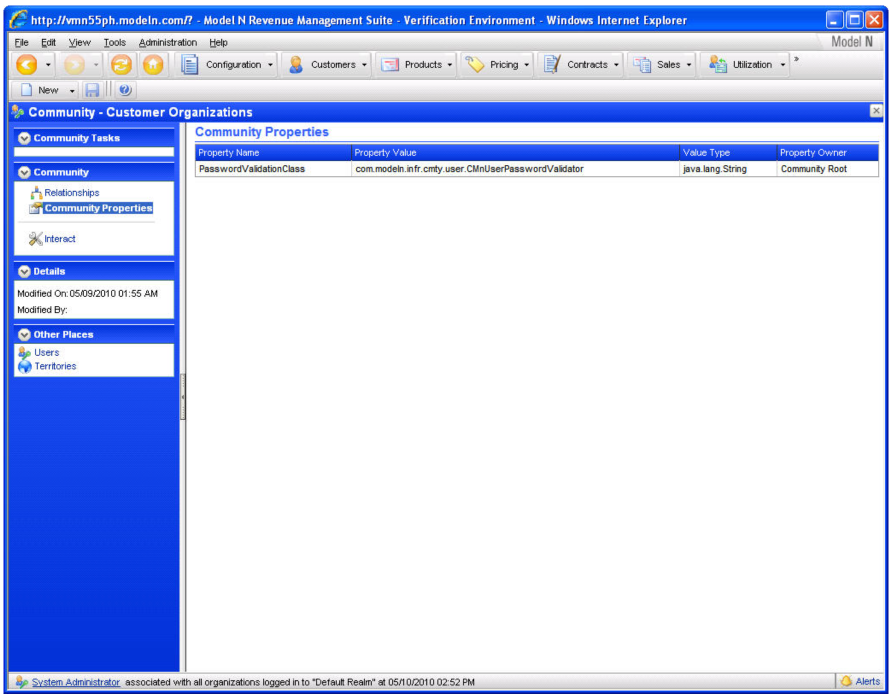
Table 10-51: Relationships Page

Name	Type	Description
Name	Link	The name of the member with which this community has a relationship.
Type	Text box	The type of relationships associated with this community. •
Direction	Text box	The direction of the relationship between the listed member and this community. Values are Incoming or Outgoing.
Start Date	Text box	The date the relationship started.
End Date	Text box	The date the relationship ended.

10.42 Community Properties Page

Navigation Path: **Administration Folders > Users and Organizations > Community > Name** link **> Community Properties**

Figure 10-16: Community Properties Page



The Community Properties page provides a view of stored properties associated with a particular community member.

Table 10-52: Community Properties Page

Name	Type	Description
Property Name	String	The name of the defined property.
Property Value	String	The value of the defined property.
Value Type	String	The Java class type of the value.
Property Owner	String	The member associated with this property.

11 Approval Routes Pages

Approval routes can be set up to approve a variety of documents such as contracts, price lists, chargeback overrides, GP workbooks, and Medicaid programs or payments.

Each approval route can be populated with an approver group or individual approvers. However, Model N recommends that you use approver groups because your system administrator can easily modify the names within a group. For example, if an approver goes on vacation, is out due to illness, or moves to another department in the company, the system administrator can modify the approver group, saving you from going through the process of creating a new approval route. The approval routes can be tiered and conditions applied to provide different approval thresholds.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

11.1 Approval Routes Page

Navigation Path: **Administration > Approval Routes**

The Approval Routes page displays the current approval routes in your installation of the Model N application suite.

Table 11-1: Approval Routes Page

Name	Type	Description
check box	Check box	Allows you to select an approval route so it can be deleted.
Name	Link	Name of the approval route. Takes you to the Approval Route General Page.
Description	String	Description of the approval route.
Status	String	Current status for the approval route.
Route Type	String	The type of approval route. Possible values are: • Chargeback Claim • Contract • DR Bundle • Estimated Payments • Forecasted RPP • Mass Update • Medicaid Payment • Medicaid Program • Payment Package • Period Package • Price Floor • Price List • Promotion • Reallocation Set • Workbook
Date Updated	Date	The date and time the approval route was last updated.

11.1.1 Select Route Type Dialog Box

Navigation Path: **Administration > Approval Routes > New approval route**

The first step in creating an approval route is to select an approval route type. The following table describes of the options available in the Select Route Type dialog box.

Table 11-2: Select Route Type Dialog Box

Name	Type	Description
Route Type *	Drop-down list	Options include: • Chargeback Claim • Contract • DR Bundle • Estimated Payments • Forecasted RPP • Mass Update • Medicaid Payment • Medicaid Program • Payment Package • Period Package • Price Floor • Price List • Promotion • Reallocation Set • Workbook
OK	Button	Creates an approval route, and then opens the General page where you can add a name and description to the route.
Cancel	Button	Cancels the action and returns to the Approval Routes page.

11.2 Approval Route General Page

Navigation Path: **Administration > Approval Routes >** *Name* link

After creating an approval route, you can add approvers and conditions to it. Refer to the following table for a description of the fields on the General page associated with an approval route.

Table 11-3: Approval Route General Page

Name	Type	Description
Route Type *	String	The route type that was selected when you created the route (Select Route Type dialog box).

Table 11-3: Approval Route General Page (Continued)

Name	Type	Description
Route Name *	String	The name of the route.
Route Description	Comment field	The route description.
Document Types *	Check box/ Drop-down list	Available options and whether or not it is a required field depend on the route type selected. For a list of document types, see Table 11-4 on page 130.
Organization	Text box /Chooser button	Opens the Select Organization dialog box to associate the approval route to an organization.
Status *	String	The approval route status.
Created On:	Date	The date on which the approval route was created.
Last Updated On	Date	The date on which the approval route was last saved.

The following table lists the document types that are available for each route type.

Table 11-4: Document Types

Route Type	Document Types
Contracts	• FSS • Group • IDN • Independent • Institutional • Managed Care • Master Agreement • Medicare Part D • PHS
Chargeback Claim	• Claim Auto Approval • Claim Manual Route
Estimated Payment	N/A
Workbook	• Workbook

Table 11-4: Document Types (Continued)

Route Type	Document Types
Mass Update	• Add Products for Pricing • Add Products for Pricing and to Programs • Add Products to Programs • Update Prices
Medicaid Payment	• Medicaid Payment
Medicaid Program	• ADAP • Medicaid • SPAP • State Supplemental
Payment Package	• Institutional Payment Package • Mco Payment Package
Promotion	• Promotion
Price Floor	• Price Floor
Price List	• Price List

11.3 Steps Page

Navigation Path: **Administration** > **Approval Routes** > *Name* link > **Steps**

After creating a route, you can add steps to it. From the Steps page you can add, delete, and renumber steps on the route.

Refer to the following table for a description of the fields on the page. Note that the available fields vary depending on whether a step has already been added to the route or not.

Table 11-5: Steps Details Page

Name	Type	Description
[check box]	Check Box	The check box displays after the first step has been added to the approval route. The check box lets you select a step, and then delete it.
Order *	String	This field displays after the first step has been added to the approval route. It determines the sequence in which the approval steps are run. Required if the Serial execution option is selected.

Table 11-5: Steps Details Page (Continued)

Name	Type	Description
Name *	Link	Name of the step; the link opens the step details page where you can create and modify approvers and conditions.
Serial execution of steps	Options button	The default setting. You can switch between the Serial and Parallel execution options. Runs the steps in sequential order.
Parallel execution of steps	Options button	Runs the steps in parallel.
Renumber	Button	Available if the Serial execution option is selected. To change the sequence in which the steps occur, specify the order, and then click Renumber.
Add	Button	Opens the Add Steps dialog box.
Delete	Button	Deletes the selected step.

11.3.1 Add Step Dialog Box

Navigation Path: **Administration > Approval Route >** *Name* link **> Steps > Add**

The Add Step dialog box lets you add a step to the approval route. The following table describes the Add Step dialog box.

Table 11-6: Add Step Dialog Box

Name	Type	Description
Step Name *	String	Enter a name.
OK	Button	Adds the specified step to the approval route, and then opens the Step Details page where you can add approvers and conditions.
Cancel	Button	Cancels the action, and closes the dialog box.

11.4 Step Details Page

Navigation Path: **Navigation Path: Administration > Approval Route >** *Name* link **> Steps >** *Steps Name* link

The Step Details (Approvers and Conditions) page lets you add sub-steps to an existing step, or approvers and conditions.

The following table describes the fields on the page.

Table 11-7: Step Details Page, Approvers and Conditions

Name	Type	Description
Step Contents *	Drop-down list	Lets you add sub-steps or approvers to a step. Options are: • Approvers • Steps
Approvers (displays if Step Contents is set to Approvers)		
Serial execution of approvers *	Options button	The default setting. You can switch between the Serial and Parallel execution options. Notifies approvers in sequential order.
Parallel execution of approvers *	Options button	Notifies approvers in parallel.
Renumber	Button	Enabled if the Serial execution option is selected. To change the sequence in which the steps occur, specify the order, and then click **Renumber**.
Add	Button	Opens the Select a User or User Group dialog box, which lets you select an approver.
Delete	Button	Deletes the selected approver.
[check box]	Check box	Displays when the approval route is being created (Draft). Selects the approver and activates the delete button.
Order *	String	Enabled and required if the Serial execution option is selected and there are multiple approvers. Determines the order in which approvers are notified.
Approver *	Link	The name of the approver; links to the Conditions page where you can view the detailed conditions for the selected approver.
Approval Requirement	String	Describes the approval requirement. Options are: • All Required • One Required
Steps (displays if Step Contents is set to Steps)		

Table 11-7: Step Details Page, Approvers and Conditions (Continued)

Name	Type	Description
Renumber	Button	Enabled if the Serial execution options is selected. To change the sequence in which the steps occur, specify the order, and then click Renumber.
Add	Button	Opens the Add Steps dialog box.
Delete	Button	Deletes the selected step.
[check box]	Check Box	Displays when the approval route is being created (Draft). Selects the step and activates the delete button.
Order *	String	Enabled and required if the Serial execution option is selected. Determines the sequence in which the approval steps are run.
Name	Link	Name of the step.
Serial execution of steps	Options button	The default setting. You can switch between the Serial execution and Parallel execution options. Runs the steps in sequential order.
Parallel execution of steps	Options button	Runs the steps in parallel.
Conditions		
Add	Button	Opens the Expression Condition dialog box, which lets you set a condition for the selected approval step.
Delete	Button	Deletes the selected condition.
Condition *	Drop-down list	Displays the name of the condition.
Comparison *	Drop-down list	The indicator used to compare the condition and the value. For example, Payment Due = $100. Comparison options are: • = (default) • != • < • <= • > • >=

Table 11-7: Step Details Page, Approvers and Conditions (Continued)

Name	Type	Description
Value *	Drop-down list or String*	Available options depend on the Route Type selected. For some routes you can enter the value, others provide a list of options such as: • True • False
Reason Description	Text Box	The reason description supplied for that condition.
All conditions must be met (AND)	Option Button	Indicates that all conditions specified have to be met.
At least one condition must be met (OR)	Option Button	Indicates that at least one of the conditions specified must be met.

11.4.1 Select a User or User Group Dialog Box

Navigation Path: **Navigation Path: Administration > Approval Route >** *Name* link **> Steps > *Steps Name*** link **> Approvers > Add**

The following table describes the Select a User or Group dialog box.

Table 11-8: Select a User or Group Dialog Box

Name	Type	Description
User Search Fields		
Look in	Drop-Down List	Opens the folder list to locate a customer list.
First Name	Text Box Searchable	Runs a “contains” search based on the search criteria.
Last Name	Text Box Searchable	Runs a “contains” search based on the search criteria.
ID	Text Box Searchable	Runs a “contains” search based on the search criteria
Type	Drop Down List	Select the user type to search. Available options are • User • Group
Organizations	Chooser Button	Select the organization

Table 11-8: Select a User or Group Dialog Box (Continued)

Name	Type	Description
Search	Button	Search based on the search criteria.
Clear	Button	Clears the search fields.
User Search Results		
Name	String	Displays the user name that matches the search criteria.
ID	String	Displays the User ID or Group ID that matches the search criteria.
Type	String	Displays the user type of the displayed users.
E-mail ID	String	Displays the e-mail ID of the user
Selected Items		
Add	Button	Adds the selected user to the selection list before adding them to the approval route (when you click OK).
Remove	Button	Removes the selected user.
Actions		
OK	Button	Adds the selected customer to the contract.
Cancel	Button	Cancels the action.

11.4.2 Expression Condition Dialog Box

Navigation Path: **Administration > Approval Route >** *Name* link **> Steps > Steps Name**

The Expression Condition dialog box lets you define one or more conditions for the selected step.

The following table describes the fields in the dialog box.

Table 11-9: Expression Condition Dialog Box

Name	Type	Description
Condition *	Drop-down list	Available options depend on the Route Type selected. See Table 11-10 on page 137 for more information.

Table 11-9: Expression Condition Dialog Box (Continued)

Name	Type	Description
Comparison *	Drop-down list	The indicator used to compare the condition and the value. For example, Payment Due = $100. Comparison options vary by condition. See Table 11-10 on page 137 for more information.
Value *	Drop-down list or String*	Available options depend on the Route Type selected. For example, you may be prompted to enter a value, or select from a drop-down list of options such as: • True • False See Table 11-10 on page 137 for more information.
Reason Description	Text Box	The reason description.
OK	Button	Saves the condition definition and then displays it on the Step Details page.
Cancel	Button	Cancels the action and closes the dialog box.

The following table describes the condition, comparison, and value types available for each route type.

Table 11-10: Expression Condition Values

Route Type	Expression Condition Type	Comparison	Value
Contracts	Contract Type	= !=	• FSS • Group • IDN • Independent • Institutional • Managed Care • Master Agreement • Medicare Part D • PHS
	Contract Domain	= !=	• Commercial • Government

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
	Non-standard Terms and Conditions	= != < <= > >=	• true • false
	Source Type	= !=	• Amendment • Contract • Converted • New • Price Floor • Price List • Price Plan • Promotion • Related Offer • Template
	Price Programs	= != < <= > >=	• true • false
	Price Below Allowable Discount Tolerance	=	• true
	Issue Account	=	• true
	Price Below FSS Price	=	• true
	Price Below Commercial Floor Price	=	• true

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
	Contract Value	= != < <= > >=	no default specified
	Price Below Best Price	=	true
	Nominal Price on Contract	=	true
Chargeback Claim or Distr Rebate Claim	Claim Amount over threshold	= != < <= > >=	no default specified
	Discrepancy Amount over threshold	= != < <= > >=	no default specified
	Discrepancy Percentage over threshold	= != < <= > >=	no default specified
	Manually Overridden lines	=	N/A

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
Estimated Payments	Total Payment Amount	= != < <= > >=	no default specified
Workbook	N/A	N/A	N/A
Mass Update	Price Below Allowable Discount Tolerance	= != < <= > >=	true false
	Price Below FSS Price	= != < <= > >=	true false
	Price Below Commercial Floor Price	= != < <= > >=	true false
	Price Below Best Price	= != < <= > >=	true false

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
	Nominal Price on Contract	= != < <= > >=	true false
Medicaid Payment	Payment Due	= != < <= > >=	no default specified
Medicaid Program	Program Type	= != < <= > >=	no default specified
Payment Package	Tier Override	= != < <= > >=	no default specified

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
Payment Package (continued)	Customer Compliance	= != < <= > >=	true false
	Line Item Changes	= != < <= > >=	true false
	Payment Package Amount	= != < <= > >=	no default specified
	Maximum Distributor Payment	= != < <= > >=	no default specified
Promotion	Qualification Type	= !=	• All • Individuals • None
Price Floor	N/A	N/A	N/A

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
Price List	Available on Contracts	= != < <= > >=	• true • false
	Available on Pricing Docs	= != < <= > >=	• true • false

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
Price List (continued)	Price List Type	= !=	• 30-Day Provisional Federal Ceiling Price • 30-Day Provisional Non-Federal AMP • Annual Federal Ceiling Price • Annual Non-Federal AMP • Average Manufacturer Price • Average Selling Price • Average Wholesale Price • Baseline AMP • Basic URA • Best Price • Best Price Estimated • Customer • Discount URA • External URA • Federal Supply Schedule 1 • Federal Supply Schedule 1 Temporary • Federal Supply Schedule 2 • Federal Supply Schedule 2 Temporary • Federal URA • General • Minimum URA • Monthly Average Manufacturer Price • Monthly Best Price • PHS Average Manufacturer Price • Penalty URA • Public Health Service Price • Quarterly Federal Ceiling Price • Quarterly Non-Federal AMP • Simple GP Test • Unit Rebate Amount • Wholesale Acquisition Cost • Wholesaler

Table 11-10: Expression Condition Values (Continued)

Route Type	Expression Condition Type	Comparison	Value
Price List (continued)	Qualification Type	= !=	• All • Individuals • None

12 Document Management Pages

The following UI elements apply to the various pages available from the **Administration > Document Management** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

12.1 Print Templates Page

Navigation Path: **Administration > Print Templates**

The Print Templates page provides the ability to upload, download, and change print templates.

Table 12-1: Print Template Page

Name	Type	Description
Search		
Name	Text box	A print template name to search for to find contracts with that name.
Document Type	Drop-down list	The type of print template for which to search. Options available are: • All • Admin Fee Rebate Payment Print Template • Contract Print Template • Contract Term • EstimatePmtPrintTemplate • Fee For Service Rebate Payment Print Template • Incentive Rebate Payment Print Template • PmtpkgPrintTemplate • Price Plan Print Template • Promotion Print Template • Service Fee Rebate Payment Print Template
Library	Drop-down list	The contract term Library categories.
Type	Drop-down list	The type of contract terms.
Category 1 through Category 8	Drop-down list	Additional categories for contract terms that can be customized by adding the appropriate constants in the dynamic enums.
Search	Button	Performs a search for the name or type specified.
Clear Search	Button	Clears the search criteria.
Results		
Name	Link	The print template name. Clicking on the link takes you to the Print Template Detail Page page.

Table 12-1: Print Template Page (Continued)

Name	Type	Description
Document Type	String	The type of print template.
Last Updated	String	The date the version was last updated.
Library	String	The contract term Library categories when the Document Type is set to Contract Term.
Type	String	The type of contract terms when the Document Type is set to Contract Term.
Category 1 through Category 8	String	Additional categories for contract terms that can be customized by adding the appropriate constants in the dynamic enums.

12.2 Print Template Detail Page

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link

The Print Template Detail page provides the following information.

Table 12-2: Print Template Detail Page

Name	Type	Description
Name *	Text box	The print template name.
Document Type *	Drop-down list	The type of print template. This is based on the application area for which this print template is used.
Is Master Page	Check box	Sets the template to a master document to be used as input to the WordXML engine, along with the object you wish to print.
Organization	Text box and Chooser button	The organization the print template is associated with.
Created On	String	The date the Term was uploaded to the system.
Last Updated On	String	The date the Term was last updated.
Version	String	The version of the print template. You can view all past versions of that template and click the link and get the details. If the contract is an older version, the detail page shows in read-only mode.

Table 12-2: Print Template Detail Page (Continued)

Name	Type	Description
Library	Drop-down list	The contract term Library categories. When the Document Type is set to `Contract Term`, the options available are: • General • Participation • Other
Type	Drop-down list	The type of contract terms. When the Document Type is set to `Contract Term`, the options available are: • Payment Terms • Pricing Programs • Shipment Terms • Warranties
Category 1 through Category 8	Drop-down list	Additional categories for contract terms that can be customized by adding the appropriate constants in the dynamic enums.

12.3 Version History Page

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link **> Version History**

In addition to the print template details, the Version History page list the versions created for the selected print template.

Table 12-3: Version History Page

Name	Type	Description
Search		
Name	Text box	A print template name to search for to find contracts with that name.

Table 12-3: Version History Page (Continued)

Name	Type	Description
Document Type	Drop-down list	The type of print template for which to search. Options available are: • All • Admin Fee Rebate Payment Print Template • Contract Print Template • Contract Term • EstimatePmtPrintTemplate • Fee For Service Rebate Payment Print Template • Incentive Rebate Payment Print Template • PmtpkgPrintTemplate • Price Plan Print Template • Promotion Print Template • Service Fee Rebate Payment Print Template
Version #	Text box	Search for a particular version of the print template.
Library	Drop-down list	The contract term Library categories when the Document Type is set to Contract Term.
Type	Drop-down list	The type of contract terms when the Document Type is set to Contract Term.
Category 1 through Category 8	Drop-down list	Additional categories for contract terms that can be customized by adding the appropriate constants in the dynamic enums.
Search	Button	Performs a search for the name or type specified.
Clear Search	Button	Clears the search criteria.
Results		
Name	Link	The print template name. Clicking on the link takes you to the Print Template Detail Page page.
Document Type	String	The type of print template.
Version #	String	The version
Last Updated	String	The date the version was last updated.
Library	String	The contract term Library categories.
Type	String	The type of print template.

Table 12-3: Version History Page (Continued)

Name	Type	Description
Category 1 through Category 8	String	Additional categories for contract terms that can be customized by adding the appropriate constants in the dynamic enums.

12.4 Print Template Navigation Panel

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link

The navigation panel contains links to basic tasks available for print templates. Refer to the following table for a complete list of links available.

Table 12-4: Print Template Navigation Panel

Navigation Panel	Link	Description
Print Template Tasks		
	Save	Saves the changes made to the current print template name or type.
	Lock Version	
	Upload Word XML	Opens the Upload Print Template Dialog Box where you can select an .xml file to upload.
	Upload Script	Opens the Upload Expression Language Script Dialog Box where you can upload a print template expression language script.
	Download Word XML	Saves the current print template as an .xml file. This option is available after one file has been uploaded.
	Download Script	Lets you save a print template expression language script. This option is available after one script has been uploaded.
Print Template		
	General	Opens the Print Template Detail Page page.
	Version History	Opens the Version History page.

Table 12-4: Print Template Navigation Panel (Continued)

Navigation Panel	Link	Description
	Interact	Provides access to the Model N expression language.
Details		
	Modified On	Date and time the print template was last modified.
	Modified By	User that last modified the print template.

12.5 Print Template Toolbar

Navigation Path: **Administration > Document Management > Print Templates >** template *Name* link

The tool bar contains buttons for basic tasks. Refer to the following table for a complete list of buttons on the Print Template tool bar.

Table 12-5: Print Template Tool bar

Button	Description
New	Opens the New Print Template Dialog Box where you can create a new print template
Save	Saves the current print template
Edit/Read Only	Makes the selected print template editable/ uneditable.
Upload Word XML	Opens the Upload Print Template Dialog Box where you can select an .xml file to upload.
Upload Script	Opens the Upload Expression Language Script Dialog Box where you can upload a print template expression language script.
Download Word XML	Saves the current print template as an .xml file. This option is available after one file has been uploaded.
Download Script	Lets you save a print template expression language script. This option is available after one script has been uploaded.

Table 12-5: Print Template Tool bar (Continued)

Button	Description
Help (?)	Provides access to the user documentation (user and reference guides). User documentation is also available from the Help menu.

12.5.1 New Print Template Dialog Box

Navigation Path: **Administration > Document Management > Print Templates > New > New Print Template**

The New Print Template dialog box lets you a new print template into the system.

Table 12-6: New Print Template Dialog Box

Name	Type	Description
Name	Text box	Lets you enter a name of the print template file you want to create.
Type*	Drop-down list	The type of print template to be created.
OK	Button	Uploads the selected print template .rtf file.
Cancel	Button	Closes the dialog box without creating a new print template.

12.5.2 Upload Print Template Dialog Box

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link > **Upload Word XML**

The Upload Print Template dialog box lets you import a new print template into the system.

Table 12-7: Upload Print Template Dialog Box

Name	Type	Description
Print Template File *	Text box	Lets you enter a name of the print template file you want to upload.
Browse	Button	Opens the Choose File dialog box where you can select a print template file.
OK	Button	Uploads the selected print template .rtf file.
Cancel	Button	Closes the dialog box without creating a new print template.

12.5.3 Upload Expression Language Script Dialog Box

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link > **Upload Script**

The Upload Expression Language Script dialog box lets you import an expression language script into the system.

Table 12-8: Upload Expression Language Script Dialog Box

Name	Type	Description
Script File *	Text box	Lets you enter a name of the script file you want to upload.
Browse	Button	Opens the Choose File dialog box where you can select a file.
OK	Button	Uploads the selected file.
Cancel	Button	Closes the dialog box without uploading a file.

For more information on the expression language, see the *Operations Guide*.

12.6 Interact Page

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link > **Interact**

The Interact page provides access to the Model N interactive scripting shell where you can use the Model N expression language.

Table 12-9: Interact Page

Name	Type	Description
[text box]	Text box	The expression you want to execute.
Command History	Drop-down listS	Lets you re-use expressions previously executed.
Go	Button	Executes the expression.
Upload	Button	Opens the Upload Script dialog box to let you execute larger scripts.
Clear	Button	Clears any existing output.

For more information on the expression languages, see the *Operations Guide*.

12.6.1 Upload Script Dialog Box

Navigation Path: **Administration > Document Management > Print Templates >** print template *Name* link > **Interact > Upload**

The Upload Script dialog box lets you import an expression language script file into the system.

Table 12-10: Upload Expression Language Script Dialog Box

Name	Type	Description
Upload Script *	Text box	Lets you enter a name of the script file you want to upload.
Browse	Button	Opens the Choose file dialog box where you can select a file.
OK	Button	Uploads the selected file.
Cancel	Button	Closes the dialog box without uploading a file.

For more information on the expression language, see the *Operations Guide*.

12.7 Contract Terms Page

Navigation Path: **Administration > Document Management> Contract Terms**

The Contract Terms page lists all contract terms available in the system. Refer to the following table for a description of the fields included on the page.

Table 12-11: Contract Terms Page Fields

Name	Type	Description
Search		
Name	Text box	The term name you want to search contracts for.
Library	Drop-down list	Contains the libraries available in the system against which you can search for terms containing the selected library.
Type	Drop-down list	Contains the types of terms in the system against which you can search for terms of the selected type.
Search	Button	Searches for terms based on the search criteria you entered. You can search for all fields.
Clear Search	Button	Clears the search criteria fields and results, allowing you to perform another search.
Results		

Table 12-11: Contract Terms Page Fields (Continued)

Name	Type	Description
Name	Link	Name of the term, for example, Best Pricing Term. Click the link to open the Contract Terms Detail Page page.
Version	String	Version number of the term.
Library	String	Library of the term.
Type	String	Type of term.
Last Updated	String	Date the term was last modified.

For detailed information on Contract Terms, see the *Contract Management Reference Guide*.

12.7.1 New Contract Term Dialog Box

Navigation Path: **Administration > Document Management> Contract Terms > New contract term**

The New Contract Term dialog box opens when you click the **New contract term** task, allowing you to add a new term to the system. You will still have to upload the associated .rtf file once the term has been created.

The New Contract Term dialog box lets you add a new contract term into the system.

Table 12-12: New Contract Term Dialog Box

Name	Type	Description
Name	Text box	Lets you enter the name of the contract term.
Term Library*	Drop-down list	List of pre configured libraries. The available values are: • General • Participation
Term Type*	Drop-down list	List of contract term types. The available values are: • Payment Terms • Pricing Programs • Shipment Terms • Warranties
OK	Button	Creates the contract term and opens the Contract Terms Detail Page.

Table 12-12: New Contract Term Dialog Box (Continued)

Name	Type	Description
Cancel	Button	Closes the dialog box without creating term.

12.8 Contract Terms Detail Page

Navigation Path: **Administration > Document Management> Contract Terms >** contract term *Name* link

The Contract Terms Detail page provides the following information.

Table 12-13: Contract Term Detail Page

Name	Type	Description
Name *	Text box	The print template name.
Term Library *	Drop-down list	The list of valid term libraries. Default options are: • General • Participation
Term Type *	Drop-down list	The type of contract term. Default values are: • Payment Terms • Pricing Programs • Shipment Terms • Warranties
Organization	Text Box/ Organization Selector	Opens the Select Organization dialog box where you can associate an organization with the contract terms.
Created On	String	The date the Term was uploaded to the system.
Last Updated On	String	The date the Term was last updated.
Version	String	The version of the print template.

12.9 Contract Terms Navigation Panel

Navigation Path: **Administration > Document Management> Contract Terms >** contract term *Name* link

The navigation panel contains links to basic tasks available for print templates. Refer to the following table for a complete list of links available.

Table 12-14: Contract Terms Navigation Panel

Navigation Panel	Link	Description
Contract Terms Tasks		
	Save	Saves the term. This is only available if the term being viewed is the most recent version.
	Upload RTF	Opens the Upload Contract Term dialog box where you can select an .rtf file to upload. This is only available if the term being viewed is the most recent version.
	Download RTF	Opens a dialog box to allow downloading the term as an .rtf file.
Contract Terms		
	General	Opens the Contract Terms Detail Page page.
Details		
	Modified On	Date and time the term was last modified.
	Modified By	User that last modified the term.

12.10 Contract Terms Toolbar

Navigation Path: **Administration > Document Management> Contract Terms >** contract term *Name* link

The tool bar contains buttons for basic tasks. Refer to the following table for a complete list of buttons on the Contract Terms tool bar.

Table 12-15: Contract Terms Tool bar

Button	Description
New	Lets you create a new term.
Save	Saves the current print template
Edit/Read Only	Makes the selected print template editable/ uneditable.

Table 12-15: Contract Terms Tool bar (Continued)

Button	Description
Upload RTF	Opens the Print Template Upload dialog box where you can select and .rtf file to upload.
Download RTF	Saves the current print template as an .rtf file
Help (?)	Provides access to the user documentation (user and reference guides). User documentation is also available from the Help menu.

12.10.1 Upload Contract Term Dialog Box

Navigation Path: **Administration > Document Management> Contract Terms >** contract term *Name* link **> Upload RTF**

This dialog box is displayed upon clicking the **Upload RTF** button on the Contract Terms Detail Page page. From this dialog box, you can upload an .rtf file to add or update a contract term to the system. When you Save, a new version of the term is created.

Table 12-16: Upload Contract Term Dialog Box

Name	Type	Description
Term File*	Text box	Lets you enter a name of the print template file you want to upload.
Browse	Button	Opens the Choose file dialog box where you can select a contract terms file.
OK	Button	Uploads the selected contract terms .rtf file.
Cancel	Button	Closes the dialog box without uploading a contract terms file.

12.11 Interact Page

Administration > Document Management > Contract Terms> contract term *Name* link > **Interact**

See Interact Page for information on this page.

13 Customer Options Pages

The following UI elements apply to the various pages available from the **Administration > Customer Options** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

13.1 Preferred GPO Page

Navigation Path: **Administration > Customer Options > Preferred GPO > Preferred GPO**

Table 13-1: Preferred GPO Page

Name	Type	Description
[check box]	Check box	Select the check box to enable the **Up** and **Down** buttons to change the ranking of the listed GPOs.
Ranking	String	The rank the GPO has.
Name	String	The name of the GPO.
ID	String	The system ID for the GPO.

13.2 File Formats Page

Navigation Path: **Administration > Customer Options > File Formats> File Formats** name link.

The File Format page lets you view and set up the default file formats that are used to manage the data inflows from the customer. The file format defines the type of data, such as membership, customer identifier, sales, and the mapping of the data in the file to data in Model N.

Table 13-2: File Formats Page

Name	Type	Description
[check box]	Check box	Select the check box to enable the Delete button.
Name	Link	Name of the file format defined for the customer. The name links to the detailed information.
Data Type	String	Type of data associated with the selected file format. Values are: • DEA • HIN • Membership • Reb/Trac • Rebate • Tracing

Table 13-2: File Formats Page (Continued)

Name	Type	Description
File Type	String	Format of the file, such as .csv or fixed width.
Description	String	A description of the file format.
Added On	Date	Date from the data flow.

13.3 File Formats Detail Page

Navigation Path: **Administration > Customer Options > File Formats> File Formats** name link > **Name** link

You can use this page to define the details of a custom file format. You can define:

- Line # the import should start from.
- For fixed width only: Character position for columns.
- Column mapping of the incoming file to internal data base fields.For utilization line, and utilization header only: date and number format.You can add or delete fields from this page.

Table 13-3: Import Lines Details Page

Name	Type	Description
Start Import at Line #	Text Box	Type in the line number. See the Customer Accounts Pages chapter of the *Customers Reference Guide* for different files types and their corresponding field names.

The following table describes the buttons on the dialog box.

Table 13-4: Import Lines Page Buttons

Button	Description
Add	Click to add field names. See the Customer Accounts Pages chapter of the *Customers Reference Guide* for more information.
Delete	Click to delete field names.

13.3.1 Add File Format Dialog Box

Navigation Path: **Administration > Customer Options > File Formats> File Formats** name link > **Add**

From the File Format page, you can specify the field names to be included in the file (for new files) by selecting the **Add** button.

The following table describes the Add File Format dialog box. The asterisk indicates a required field.

Table 13-5: Add File Format Dialog Box

Name	Type	Description
Name*	Text Box	Type in the name.
Data Type*	Drop-down list	Options are: • DEA • HIN • Membership • Reb/Trac • Rebate • Tracing
File Type*	Drop-down list	The file types change based on the data type selected. The options are: • DEA Comma Separated (CSV) Fixed Width • HIN Comma Separated (CSV) Fixed Width • Membership Comma Separated (CSV) • Reb/Trac Comma Separated (CSV) • Rebate Comma Separated (CSV) • Tracing Comma Separated (CSV)

The following table describes the buttons on the dialog box.

Table 13-6: Add File Format Page Buttons

Button	Description
OK	Saves the changes and closes the dialog box.
Cancel	Closes the dialog box without saving the changes.

13.3.2 Add Field Dialog Box

Navigation Path: **Administration > Customer Options > File Formats> File Formats** name link > **Name** link **> Add**

The following table describes the different field names for each file type.

Table 13-7: File Types and their Field Names

File Type	Field Names
DEA	• Address Line 1 • Address Line 2 • Address Line 3 • Address Line 4 • Business Activity Code • Business Activity Sub Code • City • Country • Customer Name • Drug Schedules • Expiration Date • Id Number • State • Zip

Table 13-7: File Types and their Field Names (Continued)

File Type	Field Names
HIN	• Address Line 1 • Address Line 2 • City • Country • Customer Name • DEA • Date HIN Assigned • Date Last Edited • Filler • Id Number • Last Action Code • Market • Reason Code • Record Type • Refer Back Code • State • Status • Subset • Telephone • Verified • Zip
Membership	• DEA • Effective End Date • Effective Start Date • External Customer Id • HIN

Table 13-7: File Types and their Field Names (Continued)

File Type	Field Names
Reb/Trac	• Branch Debit Memo # • Branch ID • Branch Name • Business Segment Name • Contract # • Contract Amt • Cust City • Cust ID • Cust Name • Cust State • Cust Street 1 • Cust Street 2 • Cust Zip • Debit Memo # • Invoice # • Invoice Amt • Invoice Date • Item # • Item Descr • Line # • Line Resubmit # • Parent Debit Memo # • Quantity • Req Reb Amt • Salesrep • UOM • Unit Cost Amt

Table 13-7: File Types and their Field Names (Continued)

File Type	Field Names
Rebate	• Branch Debit Memo # • Branch ID • Branch Name • Business Segment Name • Contract # • Contract Amt • Cust City • Cust ID • Cust Name • Cust State • Cust Street 1 • Cust Street 2 • Cust Zip • Debit Memo # • Invoice # • Invoice Amt • Invoice Date • Item # • Item Descr • Line # • Line Resubmit # • Parent Debit Memo # • Quantity • Req Reb Amt • Salesrep • UOM • Unit Cost Amt

Table 13-7: File Types and their Field Names (Continued)

File Type	Field Names
Tracing	• Branch Debit Memo # • Branch ID • Branch Name • Business Segment Name • Contract # • Contract Amt • Cust City • Cust ID • Cust Name • Cust State • Cust Street 1 • Cust Street 2 • Cust Zip • Debit Memo # • Invoice # • Invoice Amt • Invoice Date • Item # • Item Descr • Line # • Line Resubmit # • Parent Debit Memo # • Quantity • Req Reb Amt • Salesrep • UOM • Unit Cost Amt
Utilization Header	• Ext Customer ID • Ext Submission Num • Ext ContractId • Ext EndDate • Ext StartDate • Ext Util Type

Table 13-7: File Types and their Field Names (Continued)

File Type	Field Names
Utilization Line	• Ext Batch ID • Ext Customer ID • Ext Data Level • Ext Dispensed Units • Ext End Date • Ext Line Num • Ext Plan ID • Ext Product ID • Ext Record Purpose Indicator • Ext Rx • Ext Start Date • Ext UOM • Ext Util Type • Ext ContractId • Ext Plan Qualifier • Ext Prod Qualifier

The following table describes the buttons on the dialog box.

Table 13-8: Add Field Page Buttons

Button	Description
OK	Saves the changes and closes the dialog box.
Cancel	Closes the dialog box without saving the changes.

14 Product Options Pages

The following UI elements apply to the various pages available from the **Administration > Product Options** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

14.1 Product Options

From the Product Options menu, you can access labeler codes used in the Medicaid application and business segments.

14.2 Labeler Codes Page

Navigation Path: **Administration > Product Options > Labeler Codes**

From the Labeler Codes page, you can add and modify labeler code information including alternate labeler codes, but you cannot delete labeler or alternate labeler codes. Changes to the codes do not generate any version history.

The following table describes the fields on the page.

Table 14-1: Labeler Codes

Name	Type	Required	Editable	Description
Labeler Code	String	Yes	No	Displays the labeler code.
Description	String	Yes	No	Displays the description; limited to 50 characters.
Last Updated On	Date	Yes	No	Displays the date on which the code was last updated.
Last Updated By	String	Yes	No	Displays the user name of the person who last updated the code.
Created On	Date	Yes	No	Displays the date on which the code was created.
Created By	String	Yes	No	Displays the user name of the person who created the code.

14.2.1 Alternate Labeler Codes Panel

Navigation Path: **Administration > Product Options > Labeler Codes > Labeler Code** link

As manufacturers acquire and divest products, the labeler code may change, but the state agency may continue to use the original labeler code. The Medicaid application lets you define alternate labeler codes. The alternate labeler codes will be used in the validations process for claims to look up the current labeler code if the state agency specifies the old labeler code.

The following table describes the fields in the Alternate Labeler Codes table.

Table 14-2: Alternate Labeler Codes Page

Name	Type	Required	Editable	Description
[check box]	Check Box		Yes	Selects the row, which enables the Delete button.

Table 14-2: Alternate Labeler Codes Page (Continued)

Name	Type	Required	Editable	Description
Alternate Labeler Code	String			Displays the alternate labeler code.
Description	String	Yes		Displays the code description of the code.
Termination Date	Date		Yes	Indicates when Alternate Labeler Code was made inactive.
Last Updated On	Date	Yes		Displays the date on which the code was last updated.
Last Updated By	String	Yes		Displays the user name of the person who last updated the code.
Created On	Date	Yes		Displays the date on which the code was created.
Created By	String	Yes		Displays the user name of the person who created the code.
Comments	Comments		Yes	Type comments if necessary.

The following table describes the action buttons on the Labeler Code page.

Table 14-3: Labeler Code Page Buttons

Name	Description
Labeler Codes Panel	
Add	Adds a Labeler Code.
Delete	Displays a confirmation dialog box before deleting the selected Labeler Code.
Alternate Labeler Codes Panel	
Add	Prompts you to enter Alternate Labeler Code.
Delete	Displays a confirmation dialog box before deleting the selected Alternate Labeler Code.

Add Labeler Code Dialog Box

The following table describes the action buttons in the dialog box.

Table 14-4: Add Labeler Code Dialog Box

Name	Type	Required	Editable	Description
Labeler Code	String	Yes	Yes	Enter a new (alternate) labeler code.
Description	String	Yes	Yes	Enter a description.

For information about how to replace deleted alternate labeler codes, see the *Medicaid Reference Guide*.

14.3 Business Segments Page

Business segments are typically used to represent business divisions within an organization. You can add one or more business segments to a template. In turn, business segments may contain one or more product groups.

From the Administration menu, you can view the list of business segment templates.

Navigation Path: **Administration > Product Options > Business Segments**

The Business Segments template lists the existing business segment templates, and provides a link directly to the general page where you can view the details and make any updates that are necessary.

Table 14-5: Business Segment Template Page

Name	Type	Description
Name *	Link	Name of the business segment contained on the contract/ proposal; links to Business Segment General page
Code	Link	The business segment source content ID. This is an internal code only. Links to Business Segment General page.
Created On	Link	Indicates the date/time when the business segment was added to the contract/proposal. After you add a business segment to a contract from a template, changes you make to the business segment on the contract/proposal will not be reflected on the original source.
Last Updated	Button	Indicates the date/time when the business segment was last updated.

Table 14-5: Business Segment Template Page (Continued)

Name	Type	Description
Available for Use?	String	Indicates whether the contract is available for use. Values are: • True • False

14.4 Business Segments General Page

Navigation Path: **Administration > Product Options > Business Segments > Name** link

The General page lets you select the pricing methods for the business segment. Refer to the following table for a description of the fields on the page. An asterisk (*) indicates a required field.

Table 14-6: Business Segment General Page

Name	Type	Description
Available for Use? *	Check Box	Indicates whether the contract is available for use. Values are: • True • False Name of the business segment contained on the contract/proposal; links to Business Segment General page.
Default Base Price List	Drop-down	The business segment source content ID. This is an internal code only. Links to Business Segment General page.
Created On	String	Indicates the date and time when the business segment was added to the contract/proposal. After you add a business segment to a contract from a template, changes you make to the business segment on the contract/proposal will not be reflected on the original source.
Available Pricing Methods	Check Boxes	Indicates the date and time when the business segment was last updated.
Business Segment Code	String	Indicates whether the contract is available for use. Values are: • True • False

Table 14-6: Business Segment General Page (Continued)

Name	Type	Description
Display Name	String	Name of the business segment contained on the contract/ proposal.

15 Medicaid Options Pages

The following UI elements apply to the various pages available from the **Administration > Medicaid Options** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

15.1 Medicaid Options

From the Administration menu, the Medicaid Options provide links to the following settings:

- Medicaid Policies
- Rates
- External Web Sites
- Reimbursement Information

- Tolerances

For detailed information about the Medicaid application, see the *Medicaid Reference Guide*.

15.1.1 Medicaid Policies Page

Navigation Path: **Administration > Medicaid Options > Medicaid Policies**

The Medicaid Policies page lets administrative users maintain the configuration options that apply to Medicaid programs, claims, and payments.

The following table describes the configuration options.

Table 15-1: Medicaid Policies

Name	Type	Required	Editable	Description
Program State Defaults				
Display Payment Overdue As Of (# of days)	Number	Yes	Yes	The default setting is 38 days. The application automatically uses this value on the Program setup. Displays the number of days after the postmark date that the claim is considered due. This value also displays in alerts, due date calculation, and is used in the interest calculation for overdue payments and dispute settlements.
Default Recommended Dispute Units Calc Rule	Drop-down list	Yes	Yes	Values include: • Average • Maximum (Default) • Minimum Used in the recommended dispute units calculation. System will automatically populate dispute units to the system-generated recommended dispute units.
Default Manufacturer Contact	Staff Chooser	Yes	Yes	Used to default contact onto program setup.

Table 15-1: Medicaid Policies (Continued)

Name	Type	Required	Editable	Description
Default Adjustments Rule	Option buttons	Yes	Yes	Values include: • Incremental (Default) • Replacement The value specified here is used as the default setting for newly created programs going forward. This setting does not retroactively impact existing programs.
Claim Options				
Initialize Dispute Units from Recommended Dispute Units	Option buttons	Yes	Yes	Values include: • Yes (Default) • No If this option is set to YES, the system automatically populates the system calculated Recommended Dispute Units. The system automatically populates the dispute code based on the validation test that failed. If this option is set to NO, you must manually enter the dispute units for each NDC. The system does not automatically populate the dispute code unless the severity of the validation is Fatal, in which case the Dispute Units is automatically populated with the value from the Recommended Dispute Units.

Table 15-1: Medicaid Policies (Continued)

Name	Type	Required	Editable	Description
Auto-dispute units on correction if disputes pending	Option buttons	Yes	Yes	Values include: • Yes (default setting) • No Some pharmaceutical manufacturers automatically dispute units on a state submitted correction for a prior quarter claim when there are unsettled disputes on that prior quarter claim. This global configuration option ensures that the system automatically disputes all units on a correction when there are open disputes on the prior quarter claim. As a user, you can override the auto-disputed units based on this global setting from the claim. When set to NO, the units invoiced on the correction go through the standard validation process to determine the recommended disputes.
Dispute Threshold	$	Yes	Yes	The default setting is $0.00. If specified, this field is used to pre-populate the (Actual) Dispute Units field on claims. In addition, if you changed the Dispute Units, an additional Claim Validation warns you that the dispute units will result in the total going below the Minimum Dispute Threshold.
Default Max Units per Script Tolerance	%	Yes	Yes	The default setting is 0%. The tolerance value is used in the Max Units per Script Validation Test. The application automatically uses this value to populate the default tolerance for states and NDCs on all new programs. Changing this value does not affect existing programs.

Table 15-1: Medicaid Policies (Continued)

Name	Type	Required	Editable	Description
Default Avg. Units per Script Tolerance	%	Yes	Yes	The default setting is 20% Tolerance is used in the Avg Units per Script validation test. The application automatically uses this value to populate the default tolerance for states and NDCs on all new programs. Changing this value does not affect existing programs.
Default Rebate Ratio Tolerance	%	Yes	Yes	The default setting is 10%. The tolerance is used in the Rebate Ratio Validation Test. The application automatically uses this value to populate the default tolerance for states and NDCs on all new programs. Changing this value does not affect existing programs.
Default Reimbursement Tolerance	%	Yes	Yes	The default setting is 10%. The tolerance value is used in Reimbursement Test.
Default Paid Units Trend Tolerance	%	Yes	Yes	The default setting is 20%. The tolerance value is used in Paid Units Validation Test.
Default Paid Units Average Tolerance	%	Yes	Yes	The default setting is 20%. The tolerance value is used in Paid Units Validation Test.
# of Days Prior to Due Date for Notification:	Nbr	Yes	Yes	The default setting is 7 days. This value is used by the system in determining when to send the “Claim is Approaching Due Date” Alert.

Table 15-1: Medicaid Policies (Continued)

Name	Type	Required	Editable	Description
Payment Options				
Maximum Credit Application %	%	Yes	50%	This value indicates the maximum percent of the positive Amounts Due that the system will use when applying credit. It is applied towards the positive Amounts Due on a payment to determine the maximum credit amount that can be applied to a payment.

15.1.2 Rates Page

Navigation Path: **Administration > Medicaid Options > Rates**

The Rates page displays the list of rates types available for Medicaid claims processing. From the Task panel, you can link to the CMS site to view the published rates. For the Medicaid Minimum Rate, there are separate pages for each drug code (Single Source, Innovator, and Non-Innovator) so that you can track different rates each for each drug code.

The following table describes the information presented on the Rates page.

Table 15-2: Rates Page

Name	Type	Required	Editable	Description
Rate Type	Link	Y	N	Displays the Rate Lists. Links to the rate detail page for the corresponding Rate Type.
Revision	String	Y	N	Displays the revision number of rate type. The system only displays the latest revision for a given rate.
Last Updated On	String	Y	N	Displays the date on which the current version of the rate type was last updated.
Last Updated By	String	Y	N	Displays the name of the person who last updated the rate type.

15.1.3 Rate Type Detail Page (CPI-U, T-Bill)

Navigation Path: **Administration > Medicaid Options > Rates > Rate Type**

To view the rate details, click the rate type (link). All users can view the rates, and authorized users (depends on access privileges) can modify and add new rates to the CPI-U and T-Bill pages. Note that the **Medicaid Discount Cap** and **Medicaid Minimum Rates** are included for reference purposes only, you cannot edit them.

The following table describes the fields on the various rate pages. You can search the list of results, and export the data to a separate file.

Table 15-3: Rate Detail Page

Name	Criteria/ Result	Type	Description
Check Box		Check Box	Lets you select a row and delete the rate.
Rate	Criteria	Operator and text	Search options are: • equal to • greater than • less than • between
	Result	String	Display/Enter the rate value.
Effective Quarter/Month/ Week.	Criteria	Operator and text	Search options are • equal to • between
	Result	String	Display/Select the effective quarter, month week.
Last Updated On		String	Displays the date on which the current version of the rate value was last updated.
Last Updated By		String	Displays the name of the person that made the last update to the current version of the rate value.

The following table describes the buttons on the Rate Detail page.

Table 15-4: Rates Detail Page Buttons

Name	Description
Search	Searches for CPI-U rates based on the criteria entered.
Clear	Clears the search criteria.

Table 15-4: Rates Detail Page Buttons (Continued)

Name	Description
Add	Opens the Rate Entry Assistant which lets you add a new rate.
Delete	Deletes the selected rate.
Export	Opens the File Download dialog box, which lets you export the list to a separate file.

15.1.4 View Published Rates

Navigation Path: **Administration > Medicaid Options > Rates > Rate Type** name link **> Rates Tasks Panel**

The Rates Tasks panel provides a quick and easy way to access tasks related to the application you are working in. The links are dynamic and vary depending on the type and status of document you are viewing.

The following table describes the link to rates published by CMS.

Table 15-5: View Published Information

Rates Tasks	Description
View published information	The destination URL varies depending on the type of rate you are viewing, for example the link may open the CMS page showing CPI-U rates or the 91 Day Treasury Bill Rates. The URL displayed can be configured from **Administration > External Web Sites**.

15.1.5 Rate Entry Assistant

Navigation Path: **Administration Folder > Medicaid Options > Rates > Rate Type > Add**

From the Rate Entry Assistant dialog box, you can add a new rate to a rate list. The following table describes the fields in the Rate Entry Assistant.

Table 15-6: Rate Entry Assistant

Name	Type	Required	Editable	Description
Select Rate Effective Date				
Start Date	Drop-down list	Y	Y	Enter a start date, or click the date selector to select a date from the calendar.
Value	String	Y	Y	Enter the rate value.
OK	Button			Adds the rate to the rate list.

Table 15-6: Rate Entry Assistant (Continued)

Name	Type	Required	Editable	Description
Cancel	Button			Closes the dialog box and cancels the changes.

15.1.6 Product Tolerance Settings for Claim Validations

Product tolerance settings let you define the tolerance for each reasonability claim validation test at the product or NDC level. Each reasonability test relies on a pre-defined tolerance percentage, which lets you determine how stringently each reasonability test should be run. You can override the tolerance settings for the following reasonability tests which are included in the Medicaid application:

- Maximum Units per Script Test
- Average Units per Script Test
- Rebate Ratio Test
- Reimbursement Test
- Paid Units Trend Test
- Paid Units Average Test

Tolerance Page

Navigation Path: **Administration > Medicaid Options > Tolerances**

The following table describes the search criteria available on the Tolerances page.

Table 15-7: Tolerance Page Search Fields

Name	Type	Required	Editable	Description
NDC-11	String	No	Yes	Runs as a “Starts With” search based on the NCD -11 entered.
Product Name	String	No	Yes	Runs a “Contains” search on the Product Name entered.
Description	String	No	Yes	Runs a “Contains” search on the Product Description entered.
Drug Category	Drop-down list	No	Yes	Lets you select a category from the drop-down list and then search on that category. Options are: • All (Default) • Innovator - I • Non-Innovator Multiple Source - N • Single Source - S

The following table describes the information displayed in the Product Tolerances search results panel.

Table 15-8: Product Tolerances Search Results Panel

Name	Type	Required	Editable	Description
NDC-11	String	Yes	No	Displays the NDC-11 for the product.
Product Name	String	Yes	No	Displays the Product Name for the product.
Description	String	Yes	No	Displays the Product Description for the product.
Drug Category	String	Yes	No	Displays the Drug Category for the product.
Average Units / Script Test	%	Yes	Yes	Displays the Default Average Units per Script Test Tolerance, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.
Max Units / Script Test	%	Yes	Yes	Displays the Default Maximum Units per Script Test Tolerance, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.
Rebate Ratio Test	%	Yes	Yes	Displays the Default Rebate Ratio Test Tolerance, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.

Table 15-8: Product Tolerances Search Results Panel (Continued)

Name	Type	Required	Editable	Description
Reimbursement Test	%	Yes	Yes	Displays the Default Reimbursement Test Tolerance, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.
Paid Units Avg Test	%	Yes	Yes	Displays the Default Paid Units Average Test Tolerance, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.
Paid Units Trend Test Tolerance	%	Yes	Yes	Displays the *Default Paid Units Trend Test Tolerance*, as specified on the **Administration > Medicaid Policies** page. To change a value (by NDC) type directly in the field, or click the Update button to open the Update Tolerances dialog box. The refresh icon indicates that this value has been updated, click the icon to revert to the default value.

The following table describes the buttons on the Tolerances page.

Table 15-9: Product Tolerances Search Results Panel Buttons

Name	Description
Search	Filters the NDCs on the page to show only those that match the column-based search criteria.
Clear Search	Clears the search criteria.

Table 15-9: Product Tolerances Search Results Panel Buttons (Continued)

Name	Description
Update	Enabled if one or more rows have been selected (select the check box). Opens the Update Tolerances dialog box, which lets you change the tolerance values. Click the Reset icon to revert to the default value.
Export	Opens the File Download dialog box, which lets you save and download the information from the page.
Show Products:	Select an option from the drop-down list to change the page view: • Show All • Show Overrides Only (Default)

Update Tolerances Dialog Box

You can launch the Update Tolerances dialog box by clicking the Update button on the Tolerances page. The dialog box lets you update the tolerance percentage on multiple products (to update a tolerance for one product, select the product line and edit the percentage directly). The tolerances for the following reasonability tests can be updated:

- Average Units per Script Test
- Maximum Units per Script Test
- Rebate Ratio Test
- Reimbursement Test
- Paid Units Average Test
- Paid Units Trend Test

Within this dialog box, you can specify whether to use the default tolerance setting for a given test or a different value.

The system tracks which tolerances have been updated, the refresh icon indicates tolerances that have been updated.

The following table describes the fields on the Update Tolerances dialog box.

Table 15-10: Update Tolerances

Name	Type	Required	Editable	Description
<XY Z> Test	Text box	No	Yes	Lets you specify a tolerance (as a percentage) for each script and reasonability test. If you enter a value in this field the default value is removed. To revert to the default value, click the reset icon to the right of the field.
Reset	Icon	No	No	Click to select the default tolerance value, which is based on the settings on the **Administration > Medicaid Policies** page.
OK	Button	N/A	N/A	Updates the tolerances on this page in accordance with the values that were specified in dialog box.
Cancel	Button	N/A	N/A	Cancels any changes made to the tolerance settings.

15.1.7 External Web Sites

The External Links page lets administrative users specify URLs to access external websites. For example, you can set up links to the CMS website where you can view the published rates from the Rates detail page and published information from the Program States page.

External Web Sites Page

Navigation Path: **Administration > Medicaid Options > External Web Sites**

The following table describes the fields on the External Web Sites page.

Table 15-11: External Web Sites Page

Name	Type	Required	Editable	Description
Published Reimbursement Information	String	Yes	Yes	The default setting is the URL as defined in deployment configurations. Clicking the **View Published Information** link from the State page opens a separate browser with the Published Reimbursement Information on the CMS website.
Published Treasury Bill Rates	String	Yes	Yes	The default setting is the URL as defined in deployment configurations. Clicking the **View Published Information** link from the State page opens a separate browser with the Published Treasury Bill Rates on the CMS website.
Published CPI-U Rates	String	Yes	Yes	The default setting is the URL as defined in deployment configurations. Clicking the **View Published Information** link from the State page opens a separate browser with the Published CPI-U Rates on the CMS website.

15.1.8 Reimbursement Information

The Medicaid application provides you with the ability to validate claims using a reimbursement test. This reimbursement test requires the following state specific reimbursement information by state and quarter:

- Ingredient Cost – typically defined using a price type (such as AWP or WAC) as the basis. The Ingredient Cost formula in the Medicaid application uses a basis of AWP or WAC, plus or minus a percentage of that basis. For example, AWP – 10% translates to AWP – (AWP*10%), which can also be expressed as AWP * 90.
- Dispensing Fee – typically defined as a flat dollar amount, and may vary by drug category.
- Co-Pay - typically defined as a flat dollar amount, and may vary by drug category.

State reimbursement information is published periodically, and can be found on the CMS website.

Note that reimbursement information can be imported into the Medicaid application using a dataflow. For more information about data flows, see the *Data Flow Reference*.

The following table describes the link to View Published Information.

Table 15-12: View Published Information Link

Rates Tasks	Description
View Published Information	The destination URL varies depending on the type of rate you are viewing, for example the link may open the CMS page showing CPI-U rates or the 91 Day Treasury Bill Rates. The URL displayed can be configured from Administration > External Web Sites.

Reimbursement Information Page

Navigation Path: **Administration > Medicaid Options > Reimbursement Information**

The States Reimbursement page lets you view and modify existing reimbursement information by state and effective quarter, and add new reimbursement information by state and quarter. For example, you can define the ingredient cost, dispensing fee, and co-pay for generic or brand products or both by quarter by state.

The following table describes the Medicaid State Reimbursement search panel page.

Table 15-13: Reimbursement Information Search Panel

Name	Type	Required	Editable	Description
Quarter	Drop-down lists	No	Yes	Displays the current quarter, but you can select a different year and/or quarter from the drop-down lists.
State	Drop-down lists	No	Yes	Lets you filter the table of information by state. Options are: • All (Default) • Each of the fifty states • District of Columbia
Start Quarter	Drop-down lists	No	Yes	Select a year and quarter from the drop-down lists.

The following table describes the search results on the Medicaid State Reimbursement page

Table 15-14: Reimbursement Information Search Results

Name	Type	Required	Editable	Description
[check box]	Check box	No	Yes	Lets you select the corresponding row.
State	String	Yes	No	Displays the name of the state. Click to navigate to the Profile page for the selected state. Searchable.
Start Quarter	Qtr	Yes	No	Displays the quarter for which the selected Reimbursement Information first became effective. Searchable.
Ingredient Cost	String	Yes	Yes. You can edit this value in the Update Reimbursement dialog box.	Displays the formula defined for the Ingredient Cost Definition. Depending on your configuration (Generic and/or Brand), the display may differ. For example, if a single Ingredient Cost formula was defined for All, the Ingredient Cost displays as: • AWP – 5% Alternatively, if different Ingredient Cost formulas were defined for Generic and Brand, the Ingredient Cost displays as: • AWP-20.00% (Generic) AWP – 14.00% (Brand)

Table 15-14: Reimbursement Information Search Results (Continued)

Name	Type	Required	Editable	Description
Dispensing Fee	String	Yes	Yes. You can edit this value in the Update Reimbursement dialog box.	Displays the dollar amount for the Dispensing Fee Definition. This field may be specified as a different value for Generic and Brand, therefore it is generated as a string. For example, if a single Dispensing Fee amount was defined for All, the Dispensing Fee may be displayed as: • $7.25 Alternatively, if different Dispensing Fee amounts were defined for Generic and Brand, the Dispensing Fee may be displayed as: • $5.51 (Generic) $6.76 (Brand)
Co-Pay	String	Yes	Yes. You can edit this value in the Update Reimbursement dialog box.	Displays the dollar amount for the Co-Pay Definition. This field might be specified as a different value for Generic and Brand, therefore it is generated as a string. For example, if a single Co-Pay amount was defined for All, the Co-Pay may be displayed as: • $2.00 Alternatively, if different Co-Pay amounts were defined for Generic and Brand, the Co-Pay may be displayed as: • $0.75 (Generic) • $3.00 (Brand)

Table 15-14: Reimbursement Information Search Results (Continued)

Name	Type	Required	Editable	Description
Comments	Link	No	Yes. You can edit this value in the Add Comments dialog box.	Displays the Last Name and First Name of the user who last updated comments for this row.

The following table describes the buttons on the Reimbursement Information page.

Table 15-15: Reimbursement Information Page Buttons

Name	Description
Search	Displays the results based on the criteria entered.
Clear Search	Clears the search criteria.
Add	Opens the Add Reimbursement dialog box, which lets you add new reimbursement information for a state.
Update	Opens the Update Reimbursement Information dialog box, which lets you make changes to the selected state reimbursement information.
Delete	Lets you delete the selected state reimbursement information.
Add Comment	Opens the Add Comment dialog box, which lets you add comments to the selected line.

Add Reimbursement Information Dialog Box

Navigation Path: **Administration > Medicaid Options Reimbursement Information > Add**

The Add Reimbursement Information dialog box lets you add reimbursement information for a specified state and start quarter.

The following table describes of the fields in the dialog box.

Table 15-16: Add Reimbursement Information Dialog Box

Name	Type	Required	Editable	Description
State	Drop-down list	Yes	Yes	Choices include: • Select (Default) • Each of the fifty states, plus the District of Columbia

Table 15-16: Add Reimbursement Information Dialog Box (Continued)

Name	Type	Required	Editable	Description
Start Quarter	Drop-down list	Yes	Yes	Lets you specify the start quarter for this definition. The default setting displays the quarter you were viewing, if any. Choices include 1990 Q1 through to the current quarter.
Ingredient Cost				
[options buttons]	Radio Buttons	Yes	Yes	Choose whether or not to define Ingredient Cost for All Drug Categories, or by Brand/ Generic. Options are: • All (Default) • Brand / Generic
[Basis]	Drop-down list	Yes	Yes	Options are: • AMP • WAC
[Operator]	Drop-down list	No	Yes	Options are: • Minus (Default) • Plus
%	%	Yes	Yes	The percentage is multiplied by the basis in the Ingredient Cost calculation.
Dispensing Fee				
[options buttons]	Radio Buttons	Yes	Yes	Lets you choose whether or not to define Ingredient Cost for All Drug Categories or by Brand/Generic. Choices include: • All (Default) • Brand / Generic
Amount	$	Yes	Yes	Lets you specify a Dispensing Fee Amount.

Table 15-16: Add Reimbursement Information Dialog Box (Continued)

Name	Type	Required	Editable	Description
Co-Pay				
[options buttons]	Radio Buttons	Yes	Yes	Lets you choose whether or not to define Ingredient Cost for All Drug Categories or by Brand/Generic. Choices include: • All (Default) • Brand / Generic
Amount	$	Yes	Yes	Lets you specify a Co-Pay Amount.
OK	Button			Adds the reimbursement information to the page as specified.
Cancel	Button			Cancels that action and closes the dialog box.

Update Reimbursement Information Dialog Box

Navigation Path: **Administration > Medicaid Options Reimbursement Information > Update**

The Update Reimbursement Information dialog box lets you update reimbursement information for a specified state and start quarter.

The following table describes the fields in the Add Reimbursement Information dialog box.

Table 15-17: Update Reimbursement Information Dialog Box

Name	Type	Required	Editable	Description
State	String	Yes	No	Displays the state that was selected at the time that you clicked the Update button.
Start Quarter	String	Yes	No	Lets you specify the start quarter for this definition. The default setting displays the quarter you were viewing, if any.

Table 15-17: Update Reimbursement Information Dialog Box (Continued)

Name	Type	Required	Editable	Description
Ingredient Cost				
[Options buttons]	Option Button	Yes	Yes	Choose whether or not to define Ingredient Cost for All Drug Categories, or by Brand/ Generic. Options are: • All (Default) • Brand/Generic
[Basis]	Drop-down list	Yes	Yes	Options are: • AMP • WAC
[Operator]	Drop-down list	No	Yes	Options are: • Minus (Default) • Plus
%	%	Yes	Yes	The percentage is multiplied by the basis in the Ingredient Cost calculation.
[options buttons]	Option Button	Yes	Yes	Lets you choose whether or not to define Ingredient Cost for All Drug Categories or by Brand/Generic. Choices include: • All (Default) • Brand / Generic
Amount	$	Yes	Yes	Lets you specify a Dispensing Fee Amount.
[options buttons]	Option Button	Yes	Yes	Lets you choose whether or not to define Ingredient Cost for All Drug Categories or by Brand/Generic. Choices include: • All (Default) • Brand / Generic
Amount	$	Yes	Yes	Lets you specify a Co-Pay Amount.

Table 15-17: Update Reimbursement Information Dialog Box (Continued)

Name	Type	Required	Editable	Description
OK	Button			Updates the reimbursement information as specified.
Cancel	Button			Cancels the action and closes the dialog box.

Define Reimbursement Information Example

From the Reimbursement page, you can enter the reimbursement information available from the CMS website. The Medicaid application prompts you to select a state (California), enter the Start Quarter (2000Q1), and define the Ingredient Cost (AWP -5%), Dispensing Fee ($5.00) and the Co-Pay ($2.00). Resulting in the following reimbursement record.

Table 15-18: Defining Reimbursement Information Example

State	Start Quarter	End Quarter	Ingredient Cost	Dispensing Fee	Co-Pay
California	2000Q1	---	AWP – 5%	$7.25	$1.00

Since no other reimbursement information for California has been defined, the application applies this reimbursement information to all quarters after the explicitly selected quarter (2001Q1).

Add Additional Reimbursement Definitions Example

To specify additional Reimbursement definitions, use the same Add functionality. For example if you add a definition with a Start Quarter of 1999Q1 when information was not specified for the quarters from 1999Q1 through 1999Q4, the application applies this information to 1999Q1 through 1999Q4.

The existing record for California, Ingredient cost is defined as AWP – 5% starting in 2000Q1, remains in place, and the application creates a new record for 1999Q1 through 1999Q4 where the Ingredient Cost is defined as AWP – 7%.

Update Reimbursement Information Example

This example updates the California reimbursement information, as AWP- 3% as of 2000Q3. In doing so, the prior effective reimbursement information for California ends.

Table 15-19: Updating Reimbursement Information Example

State	Start Quarter	End Quarter	Ingredient Cost
California	1999Q1	1999Q4	AWP – 7%
California	2000Q1	2000Q2	AWP – 5%
California	2000Q3	---	AWP – 3%

16 Validations Pages

The following UI elements apply to the various pages available from the **Administration > Validations** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

16.1 Validations Configuration Page

Navigation Path: **Administration > Validations > Configurations**

The Validations Configuration page allows for the administration of validations

Table 16-1: Validations Configuration Page

Name	Type	Description
Search		
ID	Text box	The system name of the validation to search for.
Name	Text box	A user-readable name of the validation to search for.
Org Aware	Drop-down list	Limit your search by whether or not it is set to be organization aware.
Organizations	Organization selector	Limits the search to validations accessible within the specified organizations unless the **Only** check box is selected. For any given organization, validations associated with all ancestor and descendant organizations are accessible from that organization. Setting this to `My Orgs` behaves the same as clicking the **My Orgs** button. Setting this to `No Orgs` (by opening the Select Organization dialog box and clicking **OK** with no organizations selected) is equivalent to clearing all organization selections. This setting is not visible if **Org Aware** is set to `No`.
My Orgs	Button	Restricts the search to records associated with organizations that the presently logged in user is also associated with. This setting is not visible if **Org Aware** is set to `No`.
Only	Check box	Select this option to find only those validations that are directly associated with the specified organizations. This setting is not visible if **Org Aware** is set to `No`.
Search	Button	Searches for validations that match the specified criteria.
Clear	Button	Clears the search criteria.

Table 16-1: Validations Configuration Page (Continued)

Name	Type	Description
Save As	Button	Saves the search criteria to the Saved Searches folder for future use.
Results		
ID	Link	The system name of the validation. Clicking this link opens the General page.
Name	String	The user-readable name of the selected validation.
Description	String	The description of the validation.
Org Aware	String	Whether or not the validation is organization aware.
Organization	String	Organizations that this validation is associated with.

16.2 Validation General Page

Navigation Path: **Administration > Validations > Configurations >** *ID link*

The General page provides details of the selected validation.

Table 16-2: Validation General Page

Name	Type	Description
General Information		
ID	String	The system name of the validation.
Name	String	A user-readable name of the validation.
Org Aware	String	Whether or not the validation is organization aware.
Organization	String	The organizations associated with this validation. This is only visible if the validation is organization aware.
Locked	String	Whether or not the validation is locked.
Description	String	The description of the validation.

Table 16-2: Validation General Page (Continued)

Name	Type	Description
Additional Information		
Last Updated By	String	The last user to update the validation.
Last Updated On	String	The date the validation was last updated.
Parent Conf Information		
Parent ID	String	The ID of a validation that is a parent of the current validation.
Organization	String	The organization associated with the Parent ID.

16.3 Validation Tasks Page

Navigation Path: **Administration** > **Validations** > **Configurations** > *ID link* > **Tasks**

The Tasks page provides the lists of tasks associated with the selected validation. A *task* has a unique name, the name of an operation that carries out the validation, and a relative ordering

Table 16-3: Validation Tasks Page

Name	Type	Description
Search		
Search	Button	Searches for tasks that match the specified criteria.
Clear Search	Button	Clears the search criteria.
Order	Text box	Search for tasks based on the order in which they run.
ID	Text box	Search for tasks based on the system name of the task.
Name	Text box	Search for tasks based on the user-readable name of the task.
Description	Text box	Search for tasks based on the description of the task.
Required	Drop-down list	Search for tasks based on whether or not they are required.

Table 16-3: Validation Tasks Page (Continued)

Name	Type	Description
Message Only	Drop-down list	Search for tasks based on whether or not they are set for message only.
Enabled	Drop-down list	Search for tasks based on whether or not they are enabled.
Results		
Order	String	The order in which the task is run.
ID	String	The system name of the task.
Name	String	A user-readable name of the task.
Description	String	The description of the task.
Required	String	Whether or not the task is required to run.
Message Only	String	Whether or not the task generates messages only.
Enabled	Check box	Lets you enable tasks that are not already required.

16.4 Validation Messages Page

Navigation Path: **Administration > Validations > Configurations >** *ID link* **> Messages**

The Messages page provides the lists of messages associated with the selected validation.

Table 16-4: Validation Messages Page

Name	Type	Description
Search		
Search	Button	Searches for messages that match the specified criteria.
Clear Search	Button	Clears the search criteria.
ID	Text box	Search for messages based on the system name of the message.
Name	Text box	Search for messages based on the name of the message.

Table 16-4: Validation Messages Page (Continued)

Name	Type	Description
Task	Text box	Search for messages based on the task it is associated with.
Sticky	Drop-down list	Search for messages based on whether or not they are sticky, meaning they are not cleared and remain set upon subsequent revalidations. When revalidation occurs, all messages are cleared except sticky messages.
Enabled	Drop-down list	Search for messages based on whether or not they are enabled.
Results		
ID	String	The system name of the message.
Name	String	A name of the message.
Task	String	The task the message is associated with.
Sticky	String	Whether or not the message is sticky, meaning they are not cleared and remain set upon subsequent revalidations. When revalidation occurs, all messages are cleared except sticky messages.
Enabled	Check box	Lets you enable messages to display.
Details		
Application	String	The application for which you can apply the message.
Error Severity Level	Drop-down list	The severity level for the error. Default options are: • Error • Fatal • Ignore • Valid • Warning

16.5 Validation Properties Page

Navigation Path: **Administration > Validations > Configurations >** *ID link* **> Properties**

The Properties page lists the configurable properties for the validation.

Table 16-5: Validation Properties Page

Name	Type	Description
Search		
Search	Button	Searches for properties that match the specified criteria.
Clear Search	Button	Clears the search criteria.
Property Name	Text box	Search for properties based on name.
Description	Text box	Search for properties based on description.
Value	Text box	Search for properties based on value.
Results		
Property Name	String	The name of the property.
Description	String	The description of the property.
Value	Text box	The value of the property.

17 Calendar Page

The following UI elements apply to the page available from the **Administration > Calendar** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system. The field types and availability may differ depending on Medical Device installations, access settings, customizations, and whether you're in Read-Only or Edit mode or creating a new object.

17.1 Calendar Page

Navigation Path: **Administration > Calendar**

The Calendar page lets you configure an alternative calendar to better manage accounting periods.

Table 17-1: Calendar Page

Name	Type	Description
Populate Alternative Calendar Info		
Alt Calendar Type	Drop-down list	Lets you select how the quarters are defined in your alternative calendar. Options are: • **445:** The first and second months have 4 weeks; the third month has 5 weeks. • **454:** The first and third month have 4 weeks; the second month has 5 weeks. • **544:** The first month has 5 weeks; the second and third months have 4 weeks.
Alt Start Year	Text box	The year in which the alternate calendar starts, such as 2010.
Number of Years	Drop-down list	The number of years to use this alternative calendar. Options are one to ten years.
Gregorian Calendar Start Date *	Date	The calendar date to be used as the start date of the alternative calendar.
Last Year Has Extra Week	Drop-down list	Set this option to Yes to mark the last year of the alternative calendar to have an extra week. This is to accommodate leap year.
Which Month to Include the Extra Week	Drop-down list	Lets you set the month in which to include the extra week for leap year. This field is disabled if the **Last Year Has Extra Week** field is set to `No`. Options are months one to twelve.
Populate	Button	Creates the alternative calendar information for the specified amount of time.

18 DRM Default Options Page

The following UI elements apply to the page available from the **Administration > DRM Default Options** menu.

For information on the tool bar and navigation folders on these pages, see Administration Pages for more information.

Note: The application pages are documented as displayed in edit mode in the Pharmaceutical version of the Model N system.

18.1 Bundle Discount Parameters Default Options Page

Navigation Path: **Administration > DRM Default Options**

The DRM Default Options page lets you configure the default values for the bundle discount parameters and define if a parameter is available in the summary view in the Discount Reallocation Management application.

Table 18-1:

Name	Type	Description
Bundle Discount Parameters Default Options		
Parameter	String	The name of the parameter.
Default	Drop-down list Date selector	The default options depend on the parameter. Used for applying default parameters to all price types
AMP	Drop-down list Date selector	The default options depend on the parameter. Used for setting parameters for reallocations used in the monthly AMP calculations.
ASP	Drop-down list Date selector	The default options depend on the parameter. Used for setting parameters for reallocations used in the quarterly ASP calculations.
BP Initial	Drop-down list Date selector	The default options depend on the parameter. Used for setting parameters for reallocations used in Best Price Initial calculations.
BP Restated	Drop-down list Date selector	The default options depend on the parameter. Used for setting parameters for reallocations used in restated Best Price calculations.
Summary View	Check Box	Use this to set the parameter to be displayed in summary view.
Parameters		
Reallocate	Drop-down list	Selects whether this Bundle Discount should be reallocated. Options available are • Yes • No
Filter To Apply	Chooser Button	Select the name of the filter to use for excluding the transactions.

Table 18-1: (Continued)

Name	Type	Description
Reallocation Periodicity	Drop-down list	Select the period used to identify the discounts to include in one reallocation set. List of options available are: • Annual • BD Start - BD End • Monthly • Quarterly • Semi Annual
Direct Sale Reallocation Basis	Drop-down list	This field is used to decide the date field on transaction lines on basis of which it should be selected for reallocation. A transaction will be included in the calculation if the selected date field value falls between the reallocation set periodicity. Options available are: • Invoice
Indirect Sale Reallocation Basis	Drop-down list	This field is used to decide the date field on transaction lines on basis of which it should be selected for reallocation. A transaction will be included in the calculation if the selected date field value falls between the reallocation set periodicity. Options available are: • Invoice • Payment
Rebate Reallocation Basis	Drop-down list	This field is used to decide the date field on transaction lines on basis of which it should be selected for reallocation. A transaction will be included in the calculation if the selected date field value falls between the reallocation set periodicity. Options available are: • Invoice • Payment
Earned Customer	Drop-down list	Select the earned customer to for reallocation. Available options are: • Arrangement • Member • Subgroup

Table 18-1: (Continued)

Name	Type	Description
Earned Periodicity	Drop-down list	Select the period to identify the data. List of options available are: • Annual • BD Start - BD End • Monthly • Quarterly • Reallocation Period • Semi Annual
Direct Sale Earn Basis	Drop-down list	Select the direct sale earn basis. Available options are: • Invoice
Indirect Sale Earn Basis	Drop-down list	Select the indirect sale earn basis. Available options: • Invoice • Payment
Rebate Earn Basis	Drop-down list	Select the rebate sale earn basis. Available options are similar to Indirect Sale Earn Basis field.
Custom Sale Earn Basis	Drop-down list	Select the custom sale earn basis. Available options are similar to Indirect Sale Earn Basis field.
Reallocation Calculation Method	Drop-Down List	Select the Reallocation calculation method. Options available are: • Spreading • Max discount
Sale Identification Method	Drop-down list	Select the sale identification method to use. Available options are: • Discount Set • Reference Number
Direct Sale Unit Valuation	Drop-down list	Select the unit valuation method to use. Available options are: • Day Weighted WAC • EOP WAC

Table 18-1: (Continued)

Name	Type	Description
Indirect Sale Unit Valuation	Drop-down list	Select the unit valuation method to use. Available options are: • Day Weighted WAC • EOP WAC • Transaction WAC
Rebate Unit Valuation	Drop-down list	Select the unit valuation method to use. Available options are: • Day Weighted WAC • EOP WAC • Transaction WAC
Custom Sale Unit Valuation	Drop-down list	Select the unit valuation method to use. Available options are: • Day Weighted WAC • EOP WAC • Transaction WAC
Linked Earned Periods	Drop-down List	Select the Past and Future earned periods linked to an Initial Earned Period. Available options are: • None • Defined
Defined Linked Periods	Drop-down List	When Linked Earned Periods is set to "Defined" it allows identification of linked periods in reference to the initial earn periods. Available options are: • None • TP4,P2,Current,F2,TF4 where • Current is the current reallocation period • P2 is the period two periods prior to the current period and linked to the current period • F2 is the period two periods in the future to the current period and linked to the current period • TP4 is the period 4 periods prior to the current period and linked to period P2 • TF4 is the period 4 periods in the future to the current period and linked to period F2

Table 18-1: (Continued)

Name	Type	Description
Reallocation Trigger	Drop- down list	Select the method for the initial running of a reallocation set. Available options are: • Manual • Automatic
Grace Days	Text box	If Reallocation Trigger is set to Automatic, represents the number of days after the end of the reallocation period at which a reallocation is calculated but not published for a reallocation set.

A Revisions

This appendix covers the revisions made to this document based on changes in the Model N application suite, or expansion or inclusion of the content. It does not address editorial changes.

A.1 Release 5.5

The following information was added for Model N Release 5.5.

- The list of approval route types was expanded.
- Search result pages for organization-related objects now provide information on whether or not the association is direct or inherited from another object. See the **Inherited from Org** column on the following pages:
  - Associated Users Page on page 86
  - Associated Customers Page on page 94
  - Associated Territories Page on page 97
  - Associated Products Page on page 100
  - Associated Competitor Products Page on page 103
- The pages under **Administration > Sales Options** have been removed. Validations are now administered under **Administration > Validations**. See Validations Pages

on page 199 for more information.

- Realms have been deprecated in this release. Reference to realm or scope have been removed from the user interface.
- Capabilities can now be defined for users and roles for more fine-grained access controls for certain applications in the Model N application suite. See the description of the Capabilities pages in Users and Organizations Pages on page 65 for more information.

Index