Calyx RIM 7.1 on Microsoft 365 User Guide

CALYX™

Contents

Calyx RIM Outlook add-in

The Outlook add-in for Microsoft 365 Outlook enables you to fill a form and initiate the process of submission in Calyx RIM.

The Outlook add-in works with both the desktop and web versions of Microsoft 365, and enables you to:

— enter data directly to create a sequence and reference for an application.
— view and export your activity history.
— send e-mail notifications to concerned parties when data is entered in Calyx RIM Outlook add-in.
— attach documents to e-mail notifications.
— automatically populate values for the Product, Country, and Application fields based on the email subject and content.

Outlook add-in Features

Manage Submissions	Submitting a form creates a sequence and a reference in Calyx RIM and initiates a workflow to review and update the sequence and reference created. Submitting a form initiates a workflow in Calyx RIM to create a sequence for the application selected in the form and a reference for the created sequence.
Manage Attachments	Outlook items that can be attached to notifications: — Files: Files from the desktop or from the current e-mail — Event: An existing event added to the Outlook Calendar — Contacts: Contacts from the People tab The file size for the attached documents should not exceed 3 MB. If the attachment size exceeds 3MB, the attachment is uploaded to your OneDrive account. ***Note:*** *You can attach only items that has an extension. Example: .xlsx*
Manage Activity History	View and export a high-level history of the forms for the business process types submitted via Calyx RIM Outlook add-in.
Manage Configurations	Provides the ability to: — Turn Workflow functionality On and Off — Turn OneDrive functionality On and Off — Configure your customized add-in icon — Configure the Display Name — Configure the UI elements for the Add-in Contact your system administrator for configurations.

Icons and Terms

List of the icons and terms used in Calyx RIM Outlook add-in.

<table>
<tr><th>Terminology/Icons</th><th>Description</th></tr>
<tr><td></td><td>Sort in ascending or descending order.

Note: *Number defines the sequential order of sorting.*</td></tr>
<tr><td></td><td>Filter based on the available options.</td></tr>
<tr><td></td><td>Calendar</td></tr>
<tr><td>> >|</td><td>Go to the next > or last >| page.</td></tr>
<tr><td>< |<</td><td>Go to the previous < or first |< page.</td></tr>
<tr><td>|< < 1 2 3 4 5 > >|</td><td>Go to a specific page.</td></tr>
<tr><td>50 ▼ per page</td><td>Number of records per page.</td></tr>
<tr><td></td><td>Opens the Tool Box.</td></tr>
<tr><td>< Business Process</td><td>Go back to the Add-in form from the Tool Box pane.</td></tr>
<tr><td>Outlook Contacts</td><td>User Outlook contacts.</td></tr>
<tr><td>Organization Directory</td><td>User group/Organization contacts.</td></tr>
</table>

Log on to Calyx RIM Outlook add-in

Log on to Microsoft 365 outlook to access the Add-in functionality. System authentication uses Single Sign-on.

To log on:

1. From the desktop, go to the Microsoft 365 outlook *Login* page.
   The system displays the Identity Providers Login screen for the user authentication.
2. In the Username field, enter your user name.
3. In the Password field, enter your password.
4. Sign-in.

Access Calyx RIM Outlook add-in

Access the Calyx RIM Outlook add-in using the in the Outlook Web application or the Desktop application.

__Note:__ The is a default icon that can be customized.

You can find the Add-in icon in the following locations.

Outlook Versions	Add-in icon availability
Microsoft 365 Outlook Desktop application	In the Ribbon
Microsoft 365 Outlook Web application	— At the top right corner of an email body when you view an e-mail message. — At the bottom right space of an email body when you compose an e-mail message. ***Note:*** *If you do not find the Add-in icon in the above locations, expand .... The icon is available in the list.*

To access the Microsoft 365 Add-in:

1. Click the .
   The first time you access Calyx RIM Outlook add-in using Microsoft 365 Outlook, a greeting appears.
2. Click Get Started to proceed to the Add-in form.

   Every subsequent time you access Calyx RIM Outlook add-in, the Add-in form appears. If the Single Sign-on fails, the Calyx RIM Outlook add-in prompts you for permission to display the new login window.

   a) Allow.
   b) In the Username field, enter your user name.
   c) In the Password field, enter your password.
   d) Sign-in.
      The Add-in form appears.

Business Process and Business Process Types

The Calyx RIM Outlook add-in automates the business processes that include creation of sequences, references, and sequence workflows.

The different Business Process Types enable you to accomplish specific objectives in the submission process in Calyx RIM. The Business Process Types available to you depend on the configuration of the workflow functionality.

Business Process	Business Process Types
Question from Health Authority	When the workflow is disabled: — Create Sequence and Reference When the workflow is disabled and overrides is applied: — Create Submission and Reference
	When the workflow is enabled: — Create Sequence Workflow — Create Sequence and Reference When the workflow is enabled and overrides is applied: — Create Submission Workflow — Create Submission and Reference

Workflows

A workflow is initiated for the application you select in the Add-in form and includes activities for your form submission in Calyx RIM. An administrator must enable or disable the workflow for your Calyx RIM Outlook add-in.

Enable Workflow

When your administrator enables the workflow, the following Business Process Types are available within the Question From Health Authority Business Process.

- Create Sequence Workflow
- Create Sequence and Reference

Business Process Types	Business Value
Create Sequence Workflow	— Create Sequence Workflow Business Process Type associates a workflow with the application you select in the Add-in form. — The workflow includes two activities, one creates a sequence and another creates a reference for the sequence.
Create Sequence and Reference	— Create Sequence and Reference Business Process Type associates a workflow with the application you select in the Add-in form. The workflow for the application includes two activities, one for the Sequence and another for the Reference, to QC and Update the newly created entities. — Creates a Sequence for the Application you select in the Add-in form. — Creates a Reference for the newly created Sequence.

Disable Workflow

When your administrator disables the workflow, only the Create Sequence and Reference Business Process Type is available within the Question From Health Authority Business Process.

Business Process Types	Business Value
Create Sequence and Reference	— Creates a Sequence for the Application in Calyx RIM. — Creates a Reference for the Sequence in Calyx RIM.

Create Sequence Workflow

Use Create Sequence Workflow to associate a workflow with an application in Calyx RIM.

Prerequisites

This procedure is applicable for the default Create Sequence Workflow form without applied overrides.

To create a sequence workflow:

1. For Business Process, select Question from Health Authority.
2. For Business Process Type, select Create Sequence Workflow.
3. Select a Product.
   — Only products that you have permission for are displayed.
   — The Product field can be auto-populated. See: *Sequence Workflow Form Attributes*.
   — For details on selecting a product, see: *Select a Product*.
4. Select a Country.
   — The Country field is enabled after you select a product.
   — The Country field can be auto-populated. See *Sequence Workflow Form Attributes*.
5. Select an Application.
   — The Application field is enabled after you select a country and a product.
   — Only applications that are associated with the selected product and country are shown.
   — The Application field can be auto-populated. See *Sequence Workflow Form Attributes*.
6. If required, enter sequence details in the Create Sequence field.
7. Enter recipient names in the Add Notification Recipients field and select contacts.
   — The Add Notification Recipients field shows Outlook and Organization directory contacts only.
   — If the recipient is not in your Outlook or Organization directory, enter the email address of the recipient.
   — You can add multiple notification recipients.
   — You receive a copy of the notification.
8. Attach files for the notification, if required. You can attach files using these options:

Option	Description
Browse Files	Attach files from your system folder or group documents library.
Attach from Email	Add attachments from the email where you launched the Add-in. Select the file, or click Select All to select all the attached files, and Save ***Note:*** *Attach from Email is enabled only if your current email has a supported file type attached. See Sequence Workflow Form Attributes.*
×	Click the icon next to the file you want to remove from the attachment list.

The attached files are sent with the notification.

9. Submit and Notify.
A popup appears for the successful form submission. An email notification is sent to you and the other recipients entered on the form. The notification contains the hyperlink to the initiated activity. The hyperlink opens the Review and Create Sequence activity in Calyx RIM, where it can be completed.

Note: *If the combination of the fields Product, Country, and Application is not unique, the* Confirm Submission *dialog window indicates that the data was submitted previously. Move to next step.*

10. Do one of the following:

Action	Description
Click Submit	to submit the form.
Click Cancel	to change the values of the fields.

Sequence Workflow Form Attributes

When initiating a workflow you must include their attribute values in the Sequence Workflow form.

The table below lists the attributes for the Sequence Workflow form.

Field Name	Description	Business Rules
Business Process	The Business Process you select for the form.	N/A
Business Process Type	The Business Process Type for the selected Business Process.	Business Process Type: Create Sequence Workflow

Field Name	Description	Business Rules
Product	The name of the product that a submission is created for in Calyx RIM.	Only products that do not have a status mapped to the internal status of WITHDRAWN or NOT APPROVED in Calyx RIM are available. Product name is a concatenation of [`Product Name + Product Strength + Product Dosage Form`]. For example: `Paracetamol 10 mg/ml Solution for Infusion` Use to filter the Country and Application drop-down list. If the product selected does not have active applications, the following message is displayed: "There are no active Countries/Applications for the Product you have selected." Auto-populate functionality is supported: — When you view an email the Add-in was launched from: • If the current e-mail body or subject contains a full match for only one product name, the Product field is populated with that product name. • If the current e-mail body or subject contains the same number of full matches for several product names, the Product field is populated with the product name that appears first. • If the current e-mail body or subject contains a different number of full matches for several product names, the Product field is populated with the product name that appears more times. • If the current email body or subject contains a product without an application, the Product field is not populated with that product. — When you compose an email: • The Add-in populates the Product

Field Name	Description	Business Rules
Country	Name of the country.	Available for selection only after a product with active applications is selected. Only countries that you have permission to in Calyx RIM are available. Use to filter the Application drop-down list. Auto-populate functionality is supported when you view an email the Add-in was launched from: — The Country field is auto-populated only after the Product field is auto-populated. — If the current email body or subject contains the only country name, the Country field is populated with that country name. — If the current email body or subject contains the same number of matches for several countries, the Country field is populated with the country name that appears first. — If the current email body or subject contains a different number of matches for several countries, the Country field is populated with the country name that appears more times. — If the current email body or subject contains an application which has the only country, the Country field is populated with that country name.

Field Name	Description	Business Rules
Application	Name of the application. This is the application that a sequence will be created for in Calyx RIM.	This field is available only after a country is selected. Applications that are associated with the selected product and country are available. Does not display applications associated with a selected product that has a status mapped to the internal status of NOT APPROVED or WITHDRAWN. If there is only one application associated with the selected country, the Application field is populated with that application. Auto-populate functionality is supported when you view an email the Add-in was launched from: – The Application field is auto-populated only after the Country field is auto-populated. – If the current email body or subject contains the only application name, the Application field is populated with that application name. – If the current email body or subject contains the same number of matches for several application names, the Application field is populated with the application name that appears first. – If the current email body or subject contains a different number of matches for several application names, the Application field is populated with the application name that appears more times.

Field Name	Description	Business Rules
Create Sequence (Sequence Description)	The description copied to the description field for the submission created in Calyx RIM.	The sequence description entered in the Calyx RIM Outlook add-in form is copied to the Submission Description field for the QC and Update Submission activity in the workflow. The workflow is initiated for the selected application. Maximum length for the text is 4000 characters.
Add Notification Recipients	Recipients for the Outlook notification.	You can select contacts from the: — Outlook contact list — Organization directory — Manually enter email addresses The form submitter receives a copy of the notification.

Field Name	Description	Business Rules
Attach Documents	Attach files to the notification that is sent with the Outlook notification when the sequence is created.	With **Browse files**, you can attach files from the system folder or from the group documents library. With **Attach from email**, you can attach items attached to an email you launched the Add-in from. These Outlook items can be attached: — Events — Contacts — Email Message In addition, you can attach the email you launched the Add-in from along with the message history and all the items attached to it. You can drag and drop a file you want to attach. You cannot attach the Inline images in emails. **Attach from email** functionality is not supported when you compose an email. The following rules are applicable for the attachment functionality. — When the Add-in administrator enable the OneDrive functionality: • Attachments larger than 3 MB are automatically uploaded to the OneDrive storage of the user who submit the form. • You can share/edit the attachments from the OneDrive using the link. • Email notification body contains links to OneDrive attachments. — When the Add-in administrator disable the OneDrive functionality: • The list of items available for attachment does not contain attachments larger than 3 MB from the current email. • When you add files larger than 3 MB using the **Browse** option, the Add-in displays an error message. — You can limit the Attachment size

Field Name	Description	Business Rules
Submit and Notify	When you click, Submit and Notify executes the flow in Calyx RIM.	Submit and Notify is enabled only after you fill the mandatory fields with valid values. If the combination of the fields Product, Country, and Application is not unique, the Confirm Submission popup window appears with the message: "The data you have selected has been previously submitted. Submitting this form may create a duplicate record in Insight. Are you sure you want to submit the form?" The Add-in considers submissions done in last 90 days when you search for duplicate data.

Create Sequence and Reference

Use Create Sequence and Reference to create a sequence for an application and a reference for the sequence.. You can also associate a workflow with the application if your administrator enables the workflow.

Prerequisites

This procedure is applicable for the default Create Sequence and Reference form without applied overrides.

To create a sequence and reference:

1. For Business Process, select Question from Health Authority.
2. For Business Process Type, select Create Sequence and Reference.
3. Select a product.
   — Only products that you have permission for are displayed.
   — The Product field can be auto-populated. See *Sequence and Reference Workflow Form Attributes*.
   — For more details on selecting a product, see *Select a Product*.
4. Select a Country.
   — The Country field is enabled after you select a product.
   — The Country field can be auto-populated. See *Sequence and Reference Workflow Form Attributes*.
5. Select an Application.
   — The Application field is enabled after you select a country and a product.
   — Only the applications that are associated with the selected product and country are displayed.
   — The Application field can be auto-populated. See *Sequence and Reference Workflow Form Attributes*

   The Create Submission and Create Reference fields are enabled after you select a product, a country, and an application.
6. Under Create Sequence, do the following:
   a) Enter the `Sequence Name`.
   b) Select the `Filing Type`.
   c) If necessary, select the `Related Sequence`.
   d) If necessary, enter the `Sequence Description`.
7. Under Create Reference, do the following:
   a) Enter the `Reference Name`.
   b) Select the `Reference Type`.
   c) Select the `Reference Status`.
   d) Enter the `Reference Link`.
8. Enter recipient names in the Add Notification Recipients field and select contacts.
   — The Add Notification Recipients field displays Outlook and Organization directory contacts only.
   — If the recipient is not in your Outlook or Organization directory, enter the email address of the recipient.
   — You can add multiple notification recipients.

— You receive a copy of the notification.

9. Attach files for the notification, if required. The attached files are sent with the notification. Options:

Option	Description
Browse Files	Attach files from your system folder or group documents library.
Attach from Email	Add attachments from the email where you launched the Add-in. Select the file, or click Select All to select all the attached files, and Save **Note:** *Attach from Email is enabled only if your current email has a supported file type attached. See Sequence Workflow Form Attributes.*
×	Click the icon next to the file you want to remove from the attachment list.

10. Submit and Notify.
A popup appears for the successful form submission. An email notification is sent to you and the other recipients entered on the form. The notification contains the hyperlinks to the initiated activity

Note: *If the combination of the fields Product, Country, Application, and Submission Filling Type is not unique, the* Confirm Submission *dialog window indicates that the data was submitted previously. Move to next step. Do one of the following:*

11. Do one of the following:

Action	Description
Click Submit	to submit the form
Click Cancel	to change the values of the fields

Sequence and Reference Form Attributes

When creating sequences and references, you must include their attribute values in the Sequence and Reference form.

The table below lists the attributes for the sequences and references.

Field Name	Description	Business Rules
Business Process	The Business Process you select for the form.	N/A
Business Process Type	The Business Process Type for the selected Business Process.	Business Process Type: Create Sequence and Reference

Field Name	Description	Business Rules
Product	The name of the product that a submission is created for in Calyx RIM.	Only products that do not have a status mapped to the internal status of WITHDRAWN or NOT APPROVED in Calyx RIM are available. Product name is a concatenation of [`Product Name + Product Strength + Product Dosage Form`]. Example: `Paracetamol 10 mg/ml Solution for Infusion` Use to filter the Country and Application drop-down list. If the product selected does not have active applications, the following message is displayed: "There are no active Countries/Applications for the Product you have selected." Auto-populate functionality is supported: — When you view an e-mail the Add-in was launched from: • If the current e-mail body or subject contains a full match for only one product name, the Product field is populated with that product name. • If the current e-mail body or subject contains the same number of full matches for several product names, the Product field is populated with the product name that appears first. • If the current e-mail body or subject contains a different number of full matches for several product names, the Product field is populated with the product name that appears more times. — When you compose an e-mail: • The Add-in populates the Product and Country fields based on the Activity History data. • The Add-in requires at least one successful entry in the activity history to initiate auto-populate functionality. • The Add-in searches the entries in the Activity History based on the selected Business Process Type. • The Add-in searches the entries in the Activity History only for the successful form submissions(without error or fail). • The Add-in populates the Product and Country fields with the most frequently used combination on Activity History data. The Add-in validates the input by checking if the product has a related country and an application.

Field Name	Description	Business Rules
Country	Name of the country.	Available for selection only after a product with active applications has been selected. Only countries that you have permission to in Calyx RIM are available. Use to filter the Application drop-down list. Auto-populate functionality is supported when you view an email the Add-in was launched from: — The Country field is auto-populated only after the Product field is auto-populated. — If the current email body or subject contains the only country name, the Country field is populated with that country name. — If the current email body or subject contains the same number of matches for several countries, the Country field is populated with the country name that appears first. — If the current email body or subject contains a different number of matches for several countries, the Country field is populated with the country name that appears more times. — If the current email body or subject contains an application which has the only country, the Country field is populated with that country name.

Field Name	Description	Business Rules
Application	Name of the application. This is the application that a submission is created for in Calyx RIM.	This field is available only after a country is selected. Applications that are associated with the selected product and country are available. Does not display applications associated with a selected product that has a status mapped to the internal status of NOT APPROVED or WITHDRAWN. If there is only one application associated with the selected country, the Application field is populated with that application. Auto-populate functionality is supported when you view an email the Add-in was launched from: — The Application field is auto-populated only after the Country field is auto-populated. — If the current email body or subject contains the only application name, the Application field is populated with that application name. — If the current email body or subject contains the same number of matches for several application names, the Application field is populated with the application name that appears first. — If the current email body or subject contains a different number of matches for several application names, the Application field is populated with the application name that appears more times.
Sequence Name	Sequence Name to identify the sequence in Calyx RIM.	Maximum length for the text is 1000 characters.
Sequence Filing Type	Filing Type for the sequence that is created.	Available filing types are active filing types from Data Administration mapped to the country you select in the form. This is the filing type that is used for submission creation. The Filing Type list is dependent on the selected country and application type for the associated application.

Field Name	Description	Business Rules
Related Sequence	Sequence used to associate an existing open event with the new sequence that is created in Calyx RIM.	An available sequence should be associated with: — The application you select in the Add-in form — At least one open event Sequence appears in the drop-down list as a concatenation of [Sequence Code - Sequence Name]. Open events associated with the selected sequence are associated with the sequence you create in Calyx RIM.
Sequence Description	The description copied to the description field for the submission created in Calyx RIM.	Maximum length for the text is 4000 characters.
Reference Name	Name to Identify the reference.	The reference name you enter in the Calyx RIM Outlook add-in form is copied to the Reference Name field for the reference created in Calyx RIM. Maximum length for the text is 500 characters.
Reference Type	The type of reference.	The reference type you select is copied to the Reference Type field for the reference created in Calyx RIM. The list displays all the active reference types from Calyx RIM Data Administration. Used to filter the Reference Status drop-down list.
Reference Status	Status for the selected Reference Type.	The reference status you select is copied to the Reference Status field for the reference created in Calyx RIM. Available statuses are all active reference statuses that are mapped to the reference type you select. Reference Status values in Data Administration includes the mapping of reference status to reference type.
Reference Link	The URL to the reference document.	The link URL that is copied to the Reference Link field for the reference created in Calyx RIM.

Field Name	Description	Business Rules
Add Notification Recipients	Recipients for the Outlook notification.	You can select contacts from the: — Outlook contact list — Organization directory — Manually enter email addresses The form submitter receives a copy of the notification.

Field Name	Description	Business Rules
Attach Documents	Attach files to the notification that is sent with the Outlook notification when the sequence is created.	With Browse files, you can attach files from the system folder or from the group documents library. With Attach from email, you can attach items attached to an email you launched the Add-in from. These Outlook items can be attached: — Events — Contacts — Email Message In addition, you can attach the email you launched the Add-in from along with the message history and all the items attached to it. You can drag and drop a file you want to attach. You cannot attach the Inline images in emails. Attach from email functionality is not supported when you compose an email. The following rules are applicable for the attachment functionality: — When the Add-in administrator enable the OneDrive functionality: • Attachments larger than 3 MB are automatically uploaded to the OneDrive storage of the user who submitted the form. • You can share/edit the attachments from the OneDrive using the link. • Email notification body contains links to OneDrive attachments. — When the Add-in administrator disable the OneDrive functionality: • The list of items available for attachment does not contain attachments larger than 3 MB from the current email. • When you add files larger than 3 MB using the Browse option, the Add-in displays an error message. — You can limit the Attachment size with the Microsoft Exchange Server settings.

Field Name	Description	Business Rules
Submit and Notify	When clicked, Submit and Notify executes the flow in Calyx RIM.	Submit and Notify is enabled only after you fill the mandatory fields with valid values. If the combination of the fields Product, Country, Application, and Submission Filling Type is not unique, the Confirm Submission popup window appears. It contains the message: "The data you have selected has been previously submitted. Submitting this form may create a duplicate record in Calyx RIM. Are you sure you want to submit the form?" The Add-in considers submissions done in last 90 days when searching for duplicate data.

Types of Email Notifications

Email notifications inform recipients about the status of form submissions and contain links to entities created in Calyx RIM.

After submitting the Create Sequence and Reference form, you and all recipients added on the form receive an email notification. The notification details included in the e-mail depends on whether a workflow is enabled or disabled by the administrator.

Scenarios for an email notification:

Workflow is enabled:

— When a sequence and reference are created and workflow is associated with the entity, the email notification contains:
- The hyperlink to the sequence created
- The hyperlink to the reference created
- The hyperlink to the application associated with the workflow
- The hyperlink to QC and Update Submission activity

— When a sequence is created but the reference is not created and workflow is associated with the entity, the email notification contains:
- The hyperlink to the sequence created
- The values for the reference entities used on the form
- The hyperlink to the application associated with the workflow
- The hyperlink to QC and Update Submission activity

— When a sequence and reference are not created but workflow is associated with the entity, the email notification contains:
- The values for the sequence entities used on the form
- The values for the reference entities used on the form
- The hyperlink to the application associated with the workflow

  - The hyperlink to the Review and Create Submission activity
- When the sequence and reference are created but workflow is not associated with the entity, the email notification contains:
  - The hyperlink to the sequence created
  - The hyperlink to the reference created

Workflow is disabled:

The hyperlinks to the entities are created in Calyx RIM:

- The hyperlink to the sequence created
- The hyperlink to the reference created
- The hyperlink to the OneDrive attachments

Product Selection

The Product selection window enables you to select a product to filter down an application for which a sequence is created in Calyx RIM.

All products in Calyx RIM are available except those mapped to Withdrawn or Not Approved status. You can sort, search, or set as favorites any of the Calyx RIM products available in the list.

Product Selection Options

— Show Favorites: Shows the list of products that you have set as favorites.
— Show all: Shows the Calyx RIM products for which you have permission.

Search for a Product

You can search for products based on the Product Name, Product Code, and Product Family.

Select a Product

The Calyx RIM Outlook add-in Product Selection enables you to select Calyx RIM products for which you have permission in the forms.

Prerequisites

Only products for which you have permission and that do not have a status mapped to the internal status of "Withdrawn" or "Not Approved" in Calyx RIM are available.

To select a product:

1. In the Add-in form, click to select a product.
   On the *Select a Product* page, your Favorites product list appears.

   Note:
   — *The* Product *field can be configured to auto-populated the values. See Product Selection Properties.*
   — *If your Favorites product list is empty, switch to* Show all *to view all products and add some of the products to Favorites. See Add a Product to Favorites.*

2. Enter the filter criteria to search for your product. (Optional)
3. Select the required product.
   The Confirm button is enabled.
4. Confirm.

Add Product to Favorites

Adding products to Favorites simplifies your product selection process.

To add a product to your *Favorites* list:

1. In the *Select a Product* page, switch to Show all.
   A list of all products appears.
2. Click ☆ next to the product you want to add to your *Favorites* list.
   Switch to Show Favorites to see products you added to *Favorites* list.

Remove Product from Favorites

Remove the products that you no longer want in your *Favorites* list.

To remove a product from your *Favorites* list:

1. In the *Select a Product* page, switch to Show Favorites.
   Your *Favorites* product list appears.
2. Click ★ next to the product you want to remove from your *Favorites* list.
   The product is removed from your *Favorites* list.

Product Selection Properties

. Use the different options to select a product on the *Product Selection* page.

Name	Description
Switch	Switch between Show Favorites and Show all products list.
Show Favorites	Shows list of Calyx RIM products added to Favorites.
Show all	Shows list of all the Calyx RIM products according to your permissions.
Product Name	Product Name is a concatenation of [`Product Name + Product Strength + Product Dosage Form`]. For example: `Paracetamol 10 mg/ml Solution for Infusion`
Product Code	The code for a Product..
Product Family	The name for a Product Family.

Name	Description
Radio button	Select a product. ***Note:*** *You can select only one product.*
Favorites	Indicates that the product is not added to your *Favorites* list. Click to add a product to *Favorites*.
Favorites	Indicates that the product is added to your *Favorites* list. Click to remove a product from *Favorites*.

Tool Box & Activity History

The Calyx RIM Outlook add-in Tool Box enables you to view and track the status of the activities with the Activity History Analysis component. Activities are the form details that you submit via the Add-in forms.

The Activity History provides a list of the submitted forms along with the form details and their statuses. You can:
- View activity history for the forms submitted via Calyx RIM Outlook add-in.
- Filter activities based on the Business Process Type.
- Sort activities in ascending or descending order by each column.
- Export activity history report.

View and Export Activity History

You can view and export an activity history report for a selected date range. You can also view the statuses of your activities.

To view and export the Activity History report.

1. Click ⚙ to open the *Tool Box*.
2. On the *Tool Box* page, click Activity History Analysis.
   The *Activity History* appears.
3. To view and export activity history report for a selected date range: (Optional)
   a) In the From field, select the beginning date.
   b) In the To field, select the end date.
   A list of all the activities for the selected date range appears.
4. Export.
   - Exported file in the CSV format.
   - Maintains records in the CSV file according to your filter criteria and sorting.
   - The default format of the exported file name is `Activity History DD-MM-YYYY`. *DD-MM-YYYY* is the date when the report was exported.

Activity History Properties

Use the different options to filter the activity history.

Name	Description	Business Rule
Select a Date Range From & To	Date range for the report.	By default, records are sorted in descending order by Date & Time stamp. You can sort records in ascending or descending order by Date & Time stamp. — Date range is inclusive. — Form and To dates can be empty. User can view activity history records submitted for all time. — From and To fields can be the same date. — From date cannot be later than the To date. — To date cannot be earlier than the From date.
Date & Time Stamp	Date and Time of the activity.	Format for the Date is `DD-MM-YYYY`. Format for the Time is `hh:mm:ss`.
Business Process Type	Business Process Type for the selected Business Process.	By default, records for all the Business Process Types are displayed. Sort activities in ascending or descending alphabetical order by Business Process Type. Filter activities based on the Business Process Type. Click to filter activities.

Name	Description	Business Rule
Product Name	Name of the Calyx RIM product.	Product Name is a concatenation of [*Product Name + Product Strength + Product Dosage Form*]. For example: `Paracetamol 10 mg/ml Solution for Infusion`. Sort activities in ascending or descending alphabetical order by Product Name.
Country Name	Name of the selected country.	Sort activities in ascending or descending alphabetical order by Country Name.
Application Name	Name of the selected application.	Sort activities in ascending or descending alphabetical order by Application Name.

Name	Description	Business Rule
Status	One-time status of the form when it was submitted.	Sort activities in ascending or descending alphabetical order by Status. For Create Submission Workflow: — Workflow is associated with entity. — Workflow is not associated with entity. For Create Submission and Reference (when workflow is enabled): — Submission creation is completed. Reference creation is completed. Workflow is associated with entity. — Submission creation is completed. Reference creation is failed. Workflow is associated with entity. — Submission creation is failed. Reference creation is failed. Workflow is associated with entity. — Submission creation is failed. Reference creation is failed. Workflow is not associated with entity. For Create Submission and Reference (when workflow is disabled): — Submission creation is completed. Reference creation is completed. — Submission creation is completed. Reference creation is failed. — Submission creation is failed. Reference creation is failed. ***Note:*** *Reflects the status after the Calyx RIM Outlook add-in Add-in form is submitted.*

Microsoft Outlook Integration with Calyx RIM

Calyx RIM Outlook add-in enables you to create entities in Calyx RIM and initiate workflows from the Microsoft 365.

The Add-in notifies regulatory operations to complete activities in Calyx RIM as a part of the workflow. The workflows are used and entities are created for Microsoft Outlook integration with Calyx RIM.

— [O365] Create sequence workflow
— [O365] Create sequence and reference
— Sequence
— Reference

Use these conditions to define links for the attributes:

— To create a URL link, the link must begin with the prefix http://
— To create a DMS link, link to a file in a file system or DMS. You cannot link to a folder
— You must be logged on to Documentum for hyperlinks to Documentum content to work.

Common attributes for the workflow activities are:

— Activity Name
— Related Workflow
— Related Entity
— Assigned User
— Paused
— Total Time Tracked
— Due Date
— Priority

Create Submission Workflow

Use the ***Create Submission Workflow*** form to start a submission workflow in Calyx RIM.

For a successful form submission, the workflow contains the activities and supporting attributes. The workflow is not triggered for an unsuccessful form submission.

Review and create sequence

Field Name	Description	IM Req (Y/N)
Family Code	Product Family code associated with the sequence.	N/A
Family Name	Product Family associated with the sequence.	N/A

Field Name	Description	IM Req (Y/N)
Application Code	Application Code associated with the sequence.	N/A
Application Name	Application associated with the sequence.	N/A
Reviewing Country	Reviewing Country on the application associated with the sequence.	N/A
Co-Rapporteur	Current Co-Rapporteur on the CP type application. Displayed for CP type applications only.	N/A
Procedure Type	Current Procedure Type for the application associated with the sequence.	N/A
Sequence Name	Descriptive name to identify the sequence.	N/A
Sequence Status	Current status of the sequence.	N/A
Sequence Status Date	Date the status was set.	N/A
Filing Type	Available filing types depend on the selected country and application type for the associated application.	N/A
Concerned Member States	For MRP/DCP type applications only.	N/A
Owner	Person responsible for the sequence.	N/A
Sequence Category	In the US: for Supplements, you must identify the category. (CBE, CBE30, etc.)	N/A
Electronic Output Location	Location where the electronic output is stored.	N/A
Paper Reference	Reference information/ identification for paper submissions.	N/A
Origination	Name of an item the sequence was created in reference to.	N/A

Field Name	Description	IM Req (Y/N)
Events	Event related to the sequence. Available Events: Multi select Selected Events: Events currently associated with the sequence	N/A
Sequence Concerned Parties	Enter email addresses.	N/A
Sequence Description	Sequence description that was entered in the Add-in form.	N/A
Sequence Add Comments	Information entered is stamped with the Date/Time/User ID of the person entering the information.	N/A

Create reference

Field Name	Description	IM Req (Y/N)
Family Code	Code of the product family associated with the reference.	N/A
Family Name	Name of the product family associated with the reference.	N/A
Application Code	Application Code associated with the reference.	N/A
Application Name	Application associated with the reference.	N/A
Reviewing Country	Reviewing Country on the application associated with the reference.	N/A
Entity Association	Entity type associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A

Field Name	Description	IM Req (Y/N)
Entity Name	Entity Name associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Reference Name	Name of the reference. Must be unique within its parent entity.	N/A
Type	Type of reference.	N/A
Content	Additional information to identify the type and content of the reference. Examples: Mock-Up, Meeting Minutes, Notes, Time Table, etc.	N/A
Participants	Who the reference was to or from. Examples: Agency/Agency Name, internal departments, affiliates, etc.	N/A
Reference Status	Current status of the reference.	N/A
Reference Status Date	Date the current status was set.	N/A
Reference Link Type	IType of Link. Examples: Assembly, DMS, URL, File Folder	N/A
Reference Link	Link to the reference. Click Select to locate and choose the reference.	N/A
Origination	Short description, identifies what caused the correspondence contained in the reference. (Examples: questions from authority, request from affiliate, etc.)	N/A
Origination Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N/A
Origination Link	Link to the correspondence. Click Select to locate and choose the correspondence.	N/A

Field Name	Description	IM Req (Y/N)
Action	Short description, identifies the Action taken to address the reference/correspondence.	N/A
Action Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N/A
Action Link	Link to the item. Click Select to locate and choose the action.	N/A
Reference Concerned Parties	Enter email addresses.	N/A
Reference Description	Enter descriptive information.	N/A
Reference Add Comment	N/A	N/A

[O365] Create Submission and Reference

Use the Create Submission and Reference form to start the submission and reference workflow in Calyx RIM. For successful form submission, the workflow contains the activities and its supporting attributes.

QC and update submission

Field Name	Description	IM Req (Y/N)
Family Code	Product Family code associated with the sequence.	N/A
Family Name	Product Family associated with the sequence.	N/A
Application Code	Application Code associated with the sequence.	N/A
Application Name	Application associated with the sequence.	N/A
Reviewing Country	Reviewing Country on the application associated with the sequence.	N/A
Co-Rapporteur	Current Co-Rapporteur on the CP type application. Displayed only for CP type applications.	N/A
Procedure Type	Current Procedure Type for the application associated with the sequence.	N/A

Field Name	Description	IM Req (Y/N)
Sequence Name	Descriptive name to identify the sequence.	Y
Sequence Status	Current status of the sequence.	Y
Sequence Status Date	Date the status was set.	Y
Filing Type	List of Filing Type is dependent on the selected country and application type for the associated application.	Y
Concerned Member States	Displayed for MRP/DCP applications only.	N
Owner	Person responsible for the sequence.	N
Sequence Category	In the US for Supplements, you must also identify the category. (CBE, CBE30, etc.)	N
Electronic Output Location	Location where the electronic output is stored.	N
Paper Reference	Reference information/definition for paper submissions.	N
Origination	Name of an item the sequence was created in reference to.	N
Event	Identifies the Event for which the sequence is related. Available Events: Multi select. Selected Events: Events currently associated with the sequence.	N
Sequence Concerned Parties	Enter email addresses.	N
Sequence Description	Display Sequence Description that was entered in the Add-in form.	N
Sequence Add Comments	Enter information that will be stamped with the Date/Time/User ID of the person entering the information.	N

QC and update reference

Field Name	Description	IM Req (Y/N)
Family Code	Code of the product family associated with the reference.	N/A
Family Name	Name of the product family associated with the reference.	N/A
Application Code	Application Code associated with the reference.	N/A
Application Name	Application associated with the reference.	N/A
Reviewing Country	Reviewing Country on the application associated with the reference.	N/A
Entity Association	Entity type associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Entity Name	Entity Name associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Reference Name	Name of the reference. The reference name must be unique within its parent entity.	Y
Type	Type of reference.	Y
Content	Additional information to identify the type of reference, and what the content references. Examples: Mock-Up, Meeting Minutes, Notes, Time Table, etc.	N
Participant	Who the reference was to or from. Examples: Agency/Agency Name, internal departments, affiliates, etc.	N

Field Name	Description	IM Req (Y/N)
Reference Status	Current status of the reference.	Y
Reference Status Date	Date the current status was set.	Y
Reference Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Reference Link	Link to the reference. Click Select to locate and choose the reference.	N
Origination	Short description, identifies what caused the correspondence contained in the reference. (Examples: questions from authority, request from affiliate, etc.)	N
Origination Link Type	Identifies the type of Link. Examples: Assembly, DMS, URL, File Folder	N
Origination Link	Link to the correspondence. Click Select to locate and choose the correspondence.	N
Action	Short description, identifies the Action taken to address the reference/correspondence.	N
Action Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Action Link	Link to the item. Click Select to locate and choose the action.	N
Reference Concerned Parties	Enter email addresses.	N
Reference Description	Enter descriptive information.	N
Reference Add Comment	N/A	N/A

When the workflow is triggered but a reference for the submission is not created, the workflow contains the following activities and their supporting attributes.

QC and update submission - The activity fields are same as described in the *QC and update reference* table.

Review and create reference - The following activity fields are displayed:

Field Name	Description	IM Req (Y/N)
Family Code	Code of the product family associated with the reference.	N/A
Family Name	Name of the product family associated with the reference.	N/A
Application Code	Application Code associated with the reference.	N/A
Application Name	Application associated with the reference.	N/A
Reviewing Country	Reviewing Country on the application associated with the reference.	N/A
Entity Association	Entity type associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Entity Name	Entity Name associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Reference Name	Name of the reference. The reference name must be unique within its parent entity.	Y
Type	Type of reference.	Y
Content	Additional information to further identify the type of reference as to what is the content in reference to. Examples: Mock-Up, Meeting Minutes, Notes, Time Table, etc.	N
Participant	Who the reference was to or from. Examples: Agency/Agency Name, internal departments, affiliates, etc.	N

Field Name	Description	IM Req (Y/N)
Reference Status	Current status of the reference.	Y
Reference Status Date	Date the current status was set.	Y
Reference Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Reference Link	Link to the reference. Click Select to locate and choose the reference.	N
Origination	Short description, identifies what caused the correspondence contained in the reference. (Examples: questions from authority, request from affiliate, etc.)	N
Origination Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Origination Link	Link to the correspondence. Click Select to locate and choose the correspondence.	N
Action	Short description, identifies the Action taken to address the reference/correspondence.	N
Action Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Action Link	Link to the item> Click Select to locate and choose the action.	N
Reference Concerned Parties	Enter email addresses.	N
Reference Description	Enter descriptive information.	N
Reference Add Comment	N/A	N/A

When the workflow is triggered but a submission for the application is not created, the workflow contains the following activities and their supporting attributes.

Review and create submission - The following activity fields are displayed:

Field Name	Description	IM Req (Y/N)
Family Code	Product Family code associated with the sequence.	N/A

Field Name	Description	IM Req (Y/N)
Family Name	Product Family associated with the sequence.	N/A
Application Code	Application Code associated with the sequence.	N/A
Application Name	Application associated with the sequence.	N/A
Reviewing Country	Reviewing Country on the application associated with the sequence.	N/A
Co-Rapporteur	Current Co-Rapporteur on the CP type application. Displayed only for CP type applications.	N/A
Procedure Type	Current Procedure Type for the application associated with the sequence.	N/A
Sequence Name	Descriptive name to identify the sequence.	N/A
Sequence Status	Current status of the sequence.	N/A
Sequence Status Date	Date the status was set.	N/A
Filing Type	Available filing types depend on the selected country and application type for the associated application	N/A
Concerned Member States	For MRP/DCP type applications only.	N/A
Owner	Person responsible for the sequence.	N/A
Sequence Category	In the US: for Supplements, you must identify the category. (CBE, CBE30, etc.)	N/A
Electronic Output Location	Location where the electronic output is stored.	N/A
Paper Reference	Reference information/ identification for paper sequences.	N/A

Field Name	Description	IM Req (Y/N)
Origination	Name of an item the sequence was created in reference to.	N/A
Events	IEvent related to the sequence. Available Events: Multi select Selected Events: Events currently associated with the sequence	N/A
Sequence Concerned Parties	Enter email addresses.	N/A
Sequence Description	Sequence description entered in the Add-in form.	N/A
Sequence Add Comments	Information entered is stamped with the Date/Time/User ID of the person entering the information.	N/A

Review and create reference - The fields are same as described in the *Review and create submission* table.

Create Submission and Reference Entity

Use the different entities to create submissions and references.

When you submit the form for Create Submission and Reference business process type, the entities are created in Calyx RIM:

— Sequence
— Reference

Sequence entity fields:

Field Name	Description	IM Req (Y/N)
Family Code	Product Family code associated with the sequence.	N/A
Family Name	Product Family associated with the sequence.	N/A
Application Code	Application Code associated with the sequence.	N/A
Application Name	Application associated with the sequence.	N/A

Field Name	Description	IM Req (Y/N)
Included in Grouped Submission	Displayed only for SPT and ELP license modules. The field shows the hyperlink for which the sequence is associated to the submission plan.	N/A
Closed	Indicates that the sequence is closed.	N/A
Sequence Code	Code that identifies a specific submission associated with the application. For eCTD submissions, these codes begins with "0000".	N/A
Sequence Name	Descriptive name to identify the sequence.	N/A
Sequence Status	Current status of the sequence.	N/A
Sequence Status Date	Date the status was set.	N/A
Reason for Termination/Withdrawal	Reason the sequence was terminated or withdrawn.	
Filing Type	Available filing types depend on the selected country and application type for the associated application.	N/A
Reviewing Country	Reviewing Country on the application associated with the sequence.	N/A
Co-Rapporteur	Current Co-Rapporteur on the CP type application. Displayed only for CP type applications.	N/A
Concerned Member States	For MRP/DCP type applications only.	N/A
Procedure Type	Current Procedure Type for the application associated with the sequence.	N/A

Field Name	Description	IM Req (Y/N)
Events	Identifies the Event related to the sequence. Available Events: Multi select. Selected Events: Events currently associated with the sequence.	N/A
Sequence Category	In the US: for Supplements, you must identify the category. (CBE, CBE30, etc.)	N/A
Electronic Output Location	Location where the electronic output is stored.	N/A
Paper Reference	Reference information/ identification for paper submissions.	N/A
Origination	Name of an item the sequence was created in reference to.	N/A
Lifecycle Order	Displayed only for SPT, RDA, ELP license modules. An integer that indicates the order in which a sequence was added to lifecycle, irrespective of the sequence number. This provides a definitive ordering for all sequences within an application.	
Owner	Person responsible for the sequence.	N/A
Sequence Concerned Parties	Enter email addresses.	N/A
Sequence Keywords	Enter the search criteria.	
Sequence Description	Sequence description entered in the Add-in form.	N/A
Sequence Comments	When modifying, displays previously added comments.	N/A

Reference entity fields:

Field Name	Description	IM Req (Y/N)
Family Code	Code of the product family associated with the reference.	N/A

Field Name	Description	IM Req (Y/N)
Family Name	Name of the product family associated with the reference.	N/A
Reviewing Country	Reviewing Country on the application associated with the reference.	N/A
Application Code	Application Code associated with the reference.	N/A
Sequence Name	Descriptive name to identify the sequence.	N/A
Reference Name	Name of the reference, must be unique within its parent entity.	Y
Entity Association	Entity type associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Entity Name	Entity Name associated with the reference. References can be associated to: Product Family, Product (Full Product Name concatenation), Application, Event, Sequence Assembly, License, Task.	N/A
Type	Type of reference.	Y
Content	Additional information to identify the type of reference and what the content references. Examples: Mock-Up, Meeting Minutes, Notes, Time Table, etc.	N
Participant	Who the reference was to or from. Examples: Agency/Agency Name, internal departments, affiliates, etc.	N
Reference Status	Current status of the reference.	Y
Reference Status Date	Date the current status was set.	Y

Field Name	Description	IM Req (Y/N)
Reference Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Reference Link	Link to the reference. Click Select to locate and choose the reference.	N
Origination	Short description, identifies what caused the correspondence contained in the reference. (Examples: questions from authority, request from affiliate, etc.)	N
Origination Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Origination Link	Link to the correspondence. Click Select to locate and choose the correspondence.	N
Action	Short description, identifies the Action taken to address the reference/correspondence.	N
Action Link Type	Type of Link. Examples: Assembly, DMS, URL, File Folder	N
Action Link	Link to the item. Click Select to locate and choose the action.	N
Reference Concerned Parties	Enter email addresses.	N
Reference Keywords	Enter search criteria.	
Reference Description	Enter descriptive information.	N
Reference Comment	N/A	N/A

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