Uploading Content Using FTP

Another option to upload content is to use FTP, which allows for bulk load of multiple files at a time or for loading files that are larger than 50 MB, such as video files. Veeva suggests that agencies load their content to their own agency sandbox and use the migration tool for uploading the content to the client CLM staging environment.

When the FTP site is to be utilized, the following process should be followed:

Content can be loaded using any FTP client (eg, Filezilla or Cyberduck). The FTP credentials for the CLM org will be renewed every 3 months, if the user is using the Support created credentials. We now have the ability to create custom FTP credentials. (See note at the end of this document.) After obtaining the appropriate FTP credentials from Veeva Support for the respective CLM org follow the steps below. Note—when an org is enabled for CLM the FTP credentials for the content server are provided by the Veeva support team.

Create a control file for every piece of content that is to be uploaded.

The control file should be created using one of the following encodings: ASCII, ISO-8859- 1, UTF-8, UTF-16, or UTF-32 using a program on a windows machine such as Notepad or equivalent on the Mac such as Text Wrangler.

At its most basic, the format of the control file is as follows:

USER=<login username credentials for CLM environment>
PASSWORD=<password for username specified for User>
FILENAME= <Filename.ZIP>

Additional fields on the Key Message object can be added and will be populated. Each field should be entered in a separate line in the following format: <Field API Name>=<value, such as Message=name of key message>. Please refer to the graphic at the end of the document for other examples of API names that can be used.

Name the control file with the exact name of the associated file, with an extension of "ctl". For example, a control file for the Cholecap-Intro-1.ZIP slide should be named: Cholecap-Intro-1.ctl

Once the control file is ready, upload the content through FTP, and then upload the ctl file.

Once an FTP session has been started, the content itself (ZIP file) should be loaded directly to the **root** directory of the FTP server.

The control file should be uploaded to the **'ctlfile' directory** after the ZIP file has been uploaded to the root directory.

Once the file and its accompanying control file are uploaded to the FTP Server, an automatic process will run, create the Key Messages within the org, and move the file so that this is accessible to end users.

After the process runs, one can open the ctl file directory, click refresh and note that the file has been removed from the directory.

If the control file was processed successfully, the ZIP file will also be removed. After clicking on the "/" directory on the right, you can right click and choose "refresh" to see when that file has been removed.
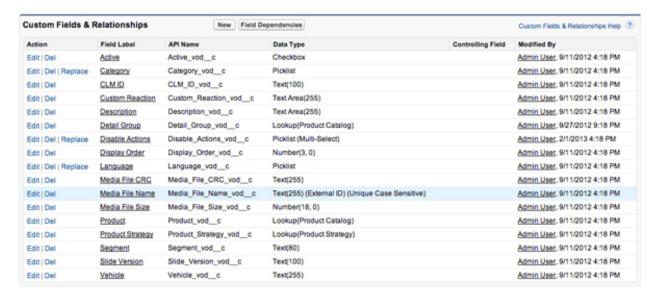
Note:

The Media File Name field is a unique external ID. If content is uploaded via FTP with the same name as an existing record, the existing content is replaced and the record updates with the information from the control file.

To summarize, an example control file could look like this:

```
USER=datasteward@customer.com.sandbox
PASSWORD=mypassword
FILENAME=Cholecap-1-Intro.zip
CLM_ID_vod__c=VeevaCLM
Name=Cholecap – Events
Product_vod__c=a00S0000002i4oO
Slide_Version_vod__c=1.0.0
Description_vod__c=Cholecap - 5 53% Fewer Adverse Events
```

If the file is not successfully uploaded, the user that is associated with the username in the ctl file will receive an email from Salesforce with a title of noreply that will inform the user that the ZIP file was not successfully uploaded.

A partial list of Fields, and their associated API Names, that can be included in a control file

Custom Fields & Relationships					Custom Fields & Relationships Help ?
Action	Field Label	API Name	Data Type	Controlling Field	Modified By
Edit | Del	Active	Active_vod__c	Checkbox		Admin User, 9/11/2012 4:18 PM
Edit | Del | Replace	Category	Category_vod__c	Picklist		Admin User, 9/11/2012 4:18 PM
Edit | Del	CLM ID	CLM_ID_vod__c	Text(100)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Custom Reaction	Custom_Reaction_vod__c	Text Area(255)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Description	Description_vod__c	Text Area(255)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Detail Group	Detail_Group_vod__c	Lookup(Product Catalog)		Admin User, 9/27/2012 9:18 PM
Edit | Del | Replace	Disable Actions	Disable_Actions_vod__c	Picklist (Multi-Select)		Admin User, 2/1/2013 4:18 PM
Edit | Del	Display Order	Display_Order_vod__c	Number(3, 0)		Admin User, 9/11/2012 4:18 PM
Edit | Del | Replace	Language	Language_vod__c	Picklist		Admin User, 9/11/2012 4:18 PM
Edit | Del	Media File CRC	Media_File_CRC_vod__c	Text(255)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Media File Name	Media_File_Name_vod__c	Text(255) (External ID) (Unique Case Sensitive)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Media File Size	Media_File_Size_vod__c	Number(18, 0)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Product	Product_vod__c	Lookup(Product Catalog)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Product Strategy	Product_Strategy_vod__c	Lookup(Product Strategy)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Segment	Segment_vod__c	Text(80)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Slide Version	Slide_Version_vod__c	Text(100)		Admin User, 9/11/2012 4:18 PM
Edit | Del	Vehicle	Vehicle_vod__c	Text(255)		Admin User, 9/11/2012 4:18 PM

Special Note on Multi-Select Picklists

When using a control file to update a multi-select picklist (eg, Disable Actions), multiple values for a field are separated by a semi-colon (without any spaces). For example, if a user wanted to disable both the Swipe and Pinch gestures on a specific Key Message, the line in the control file would be: "Disable_Actions_vod__c=Swipe_vod;Pinch_To_Exit_vod " (without quotation marks).

Giving Control of the FTP to Customers/Agencies

We can now enable users to manage their own FTP credentials – meaning no more password resets every 90 days and no need to relink the FTP after a refresh.

1. Log in to your sandbox as an Admin (eg, Content Loader)

2. Setup > Customize > Users > Page Layouts

3. Click "Edit" to the left of User Layout

4. Add the "Content Admin" field to the page layout and click Save

5. Setup > Manage Users > Users

6. Click "Edit" to the left of the user you want to enable (eg, Content Loader)

7. Check the "Content Admin" box

8. The user will now have an FTP credential that uses the same original FTP host (eg, vf4.vod309.com) and his Content Loader username and password will also be his FTP username and password

9. If you want this option to be checked by default for any newly created users, navigate to Setup > Customize > Users > Fields

10. Under User Custom Fields, click "Edit" the left of Content Admin and mark the radio button next to "Checked" under General Options