

Global Account Search Installation Document

Document Version 1.1

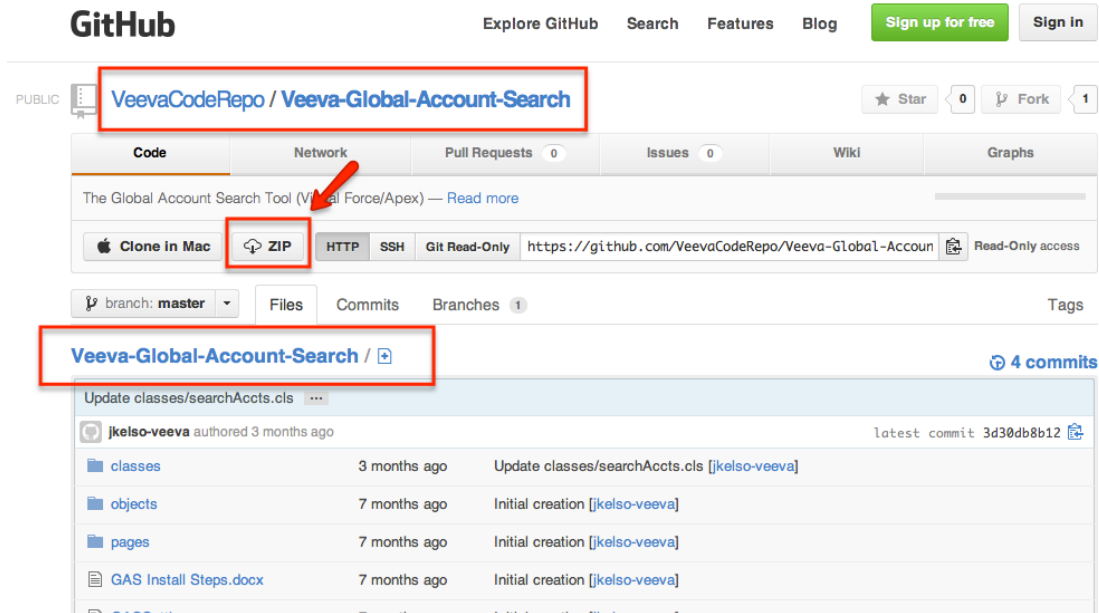
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DOCUMENT VERSION	AUTHOR	CHANGE DESCRIPTION	DATE OF CHANGE
1.0	Murugesh Naidu	Created for v2.0	04/24/2013
1.1	Murugesh Naidu	Updated for GAS v2.1	7/31/2013

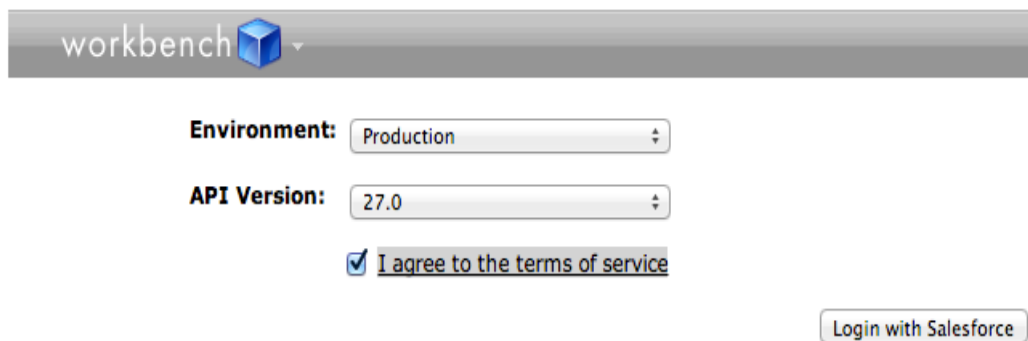
GAS 2.0 Installation using SFDC Workbench (Cloud Installation)

GAS tool is a standard Salesforce custom solution that uses Apex and VisualForce as its core components. The following steps can be followed in order to install GAS into your organization:

1. Using your browser, navigate to the [Veeva GitHub Repository](#)
 - a. Click on the **ZIP** button as indicated in the snapshot below. This should start a Zip file download to your local hard drive

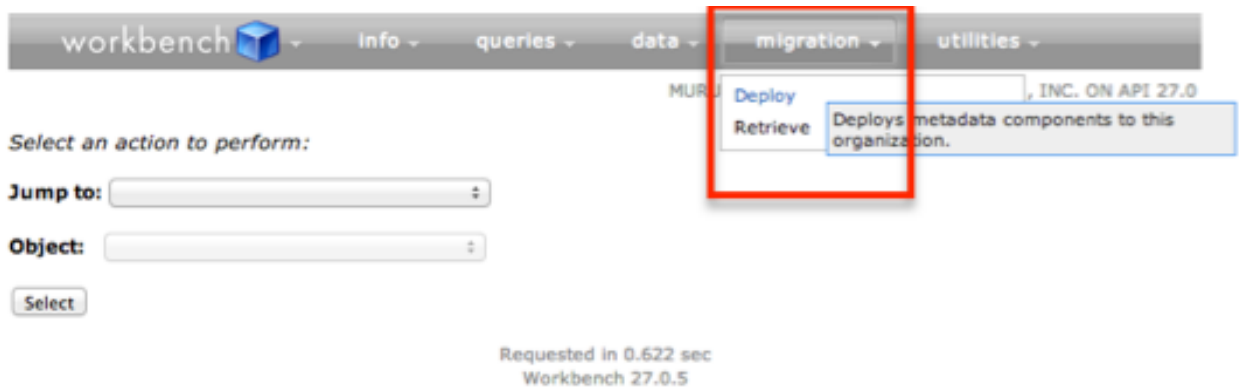


2. Login to the subject/destination Veeva org where GAS is required to be added
3. Navigate to [SFDC Workbench Website](#)
 - a. Select Production or Sandbox depending on whether you logged into a Production (https://login.salesforce.com) or Sandbox org (https://test.salesforce.com) in step #1.
 - b. Check “I agree to the terms of service”
 - c. Click on “Login with Salesforce” button

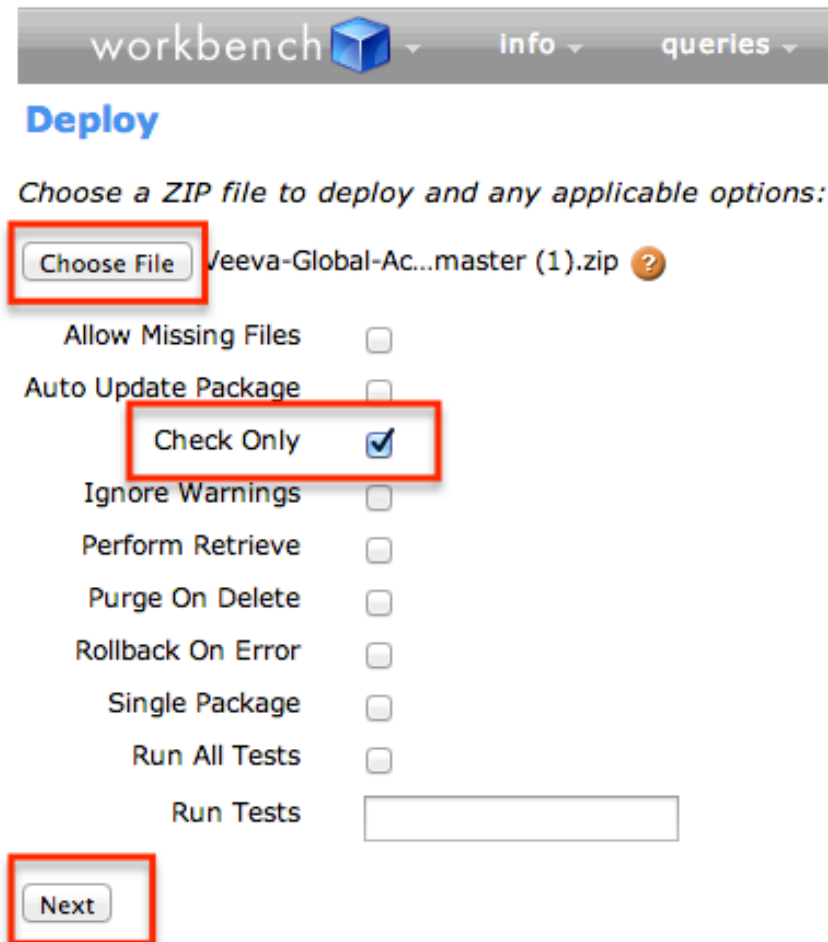


Workbench 27.0.5

4. After logging into Workbench, go to *migration* → *Deploy*



5. Upload the Zip file downloaded in step 1a by clicking on the “Choose File” button
- a. Check “Check Only” if you only wish to validate if the zip file will deploy successfully. This option will not make any changes into the target but will simply simulate the actual deployment
 - b. Click Next to start the Deployment (or Simulated Deployment)



6. On the Confirmation screen, confirm the selections and click Deploy

Successfully staged 74 KB zip file Veeva-Global-Account-Search-master (1).zip for deployment.

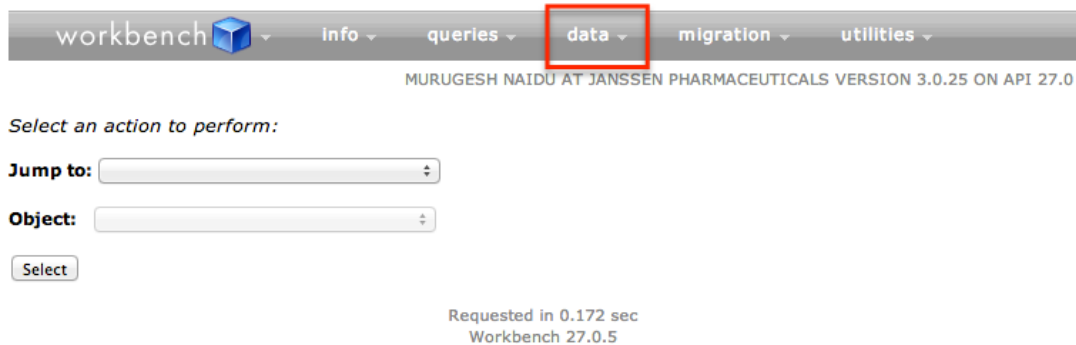
Confirm the following deployment options:

[Expand All](#) | [Collapse All](#)

- ✧ allowMissingFiles: **false**
- ✧ autoUpdatePackage: **false**
- ✧ checkOnly: **true**
- ✧ ignoreWarnings: **false**
- ✧ performRetrieve: **false**
- ✧ purgeOnDelete: **false**
- ✧ rollbackOnError: **false**
- ✧ singlePackage: **false**
- ✧ runAllTests: **false**
- ✧ runTests:

Deploy

7. Expand the zip file downloaded in step 1 and using standard SFDC Data Loader, use the contained CSV files to data load the Custom Settings (GASSettings.csv) and Veeva Messages (GASVeevaMessages.csv) associated with GAS. You may also choose to use the [SFDC Workbench Website's](#) **Data→Insert** option as show in snapshot below.



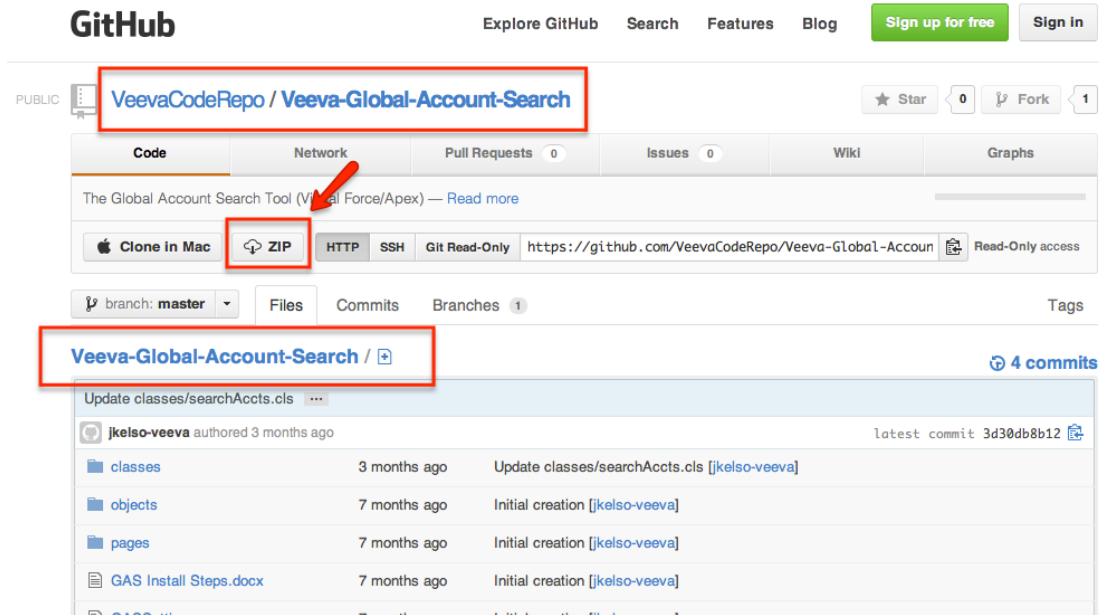
8. At this point, GAS is installed and ready for use with some minimal configuration. The actual configuration steps may vary based on your preference. But here is an outline of what needs to be done:
- Create a VisualForce tab and point the tab to the VisualForce page called *searchAccts.page* (*Setup→Create→Tabs→New - under VisualForce tabs*)
 - Change default tab visibility as needed
 - Navigate to *Setup→Develop→Pages* and go to the *searchAccts.page*. Click the "Security" link and add any required Profiles that need visibility to the GAS tab
 - Clear Veeva Cache (optional)

GAS 2.0 Installation using Eclipse

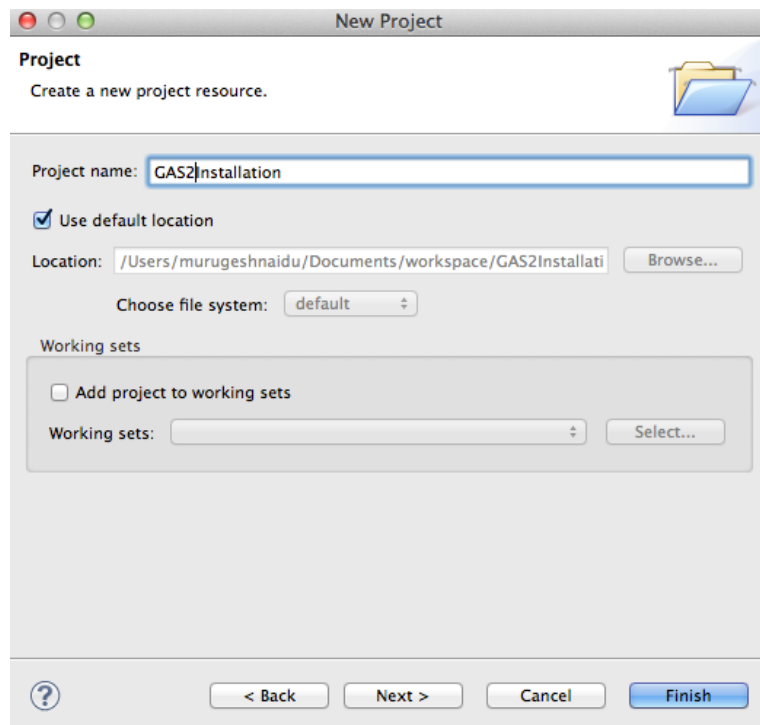
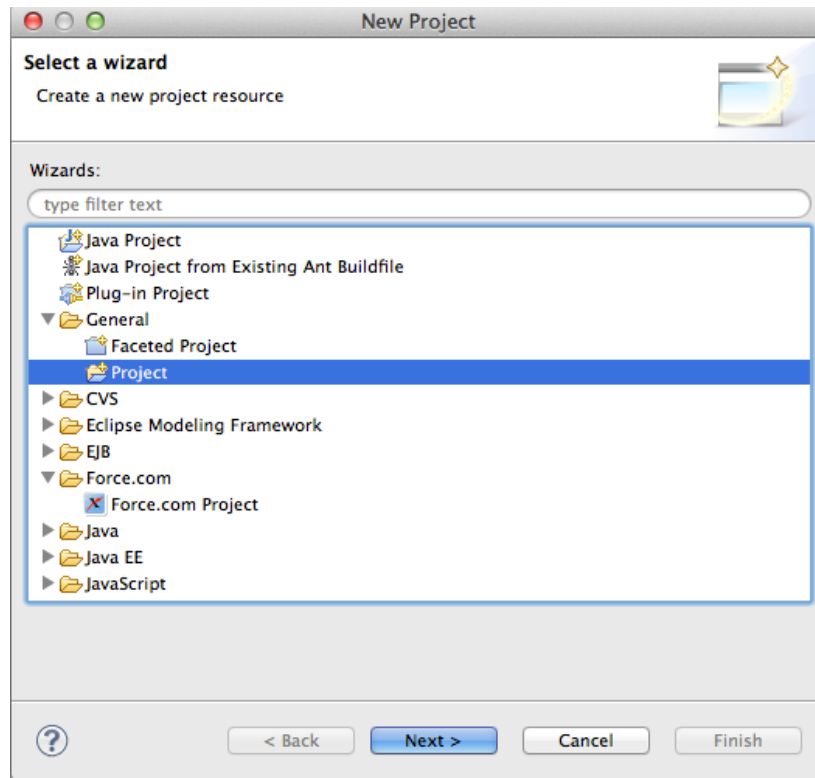
Pre-requisite: Must already have a working installed version of Eclipse with Force.com plugin. Please refer to the following link for installation details →

http://wiki.developerforce.com/page/Force.com_IDE_Installation_for_Eclipse_3.3.x

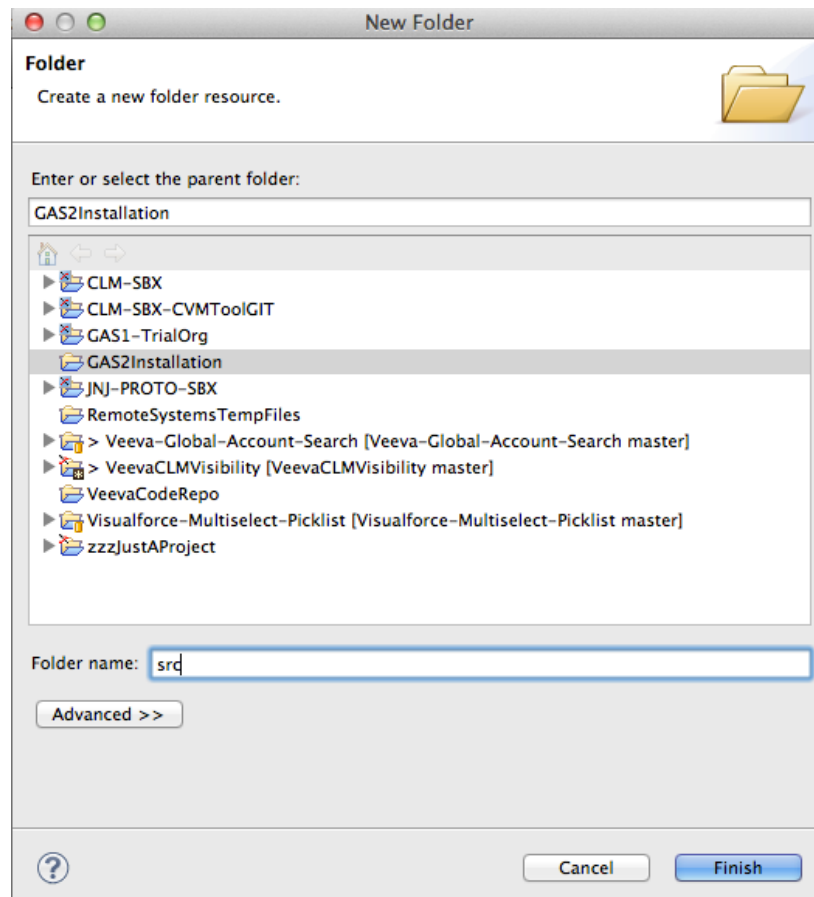
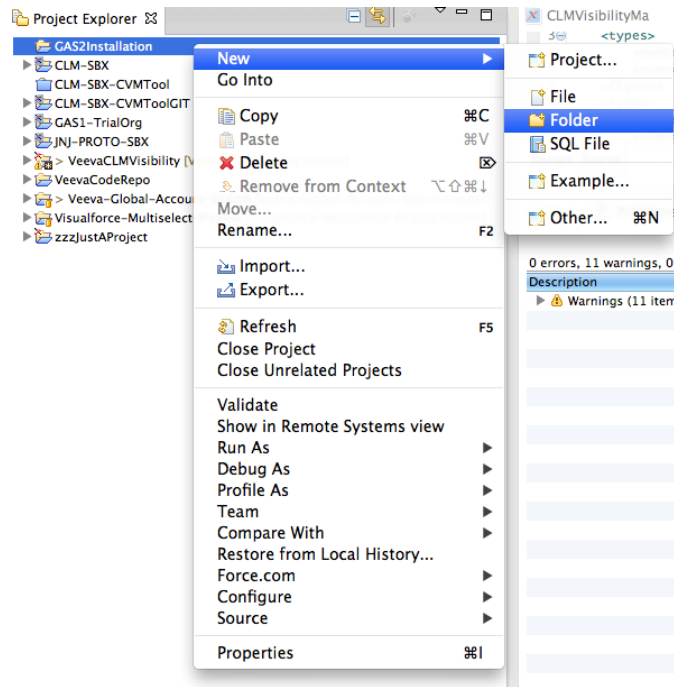
1. Using your browser, navigate to the [Veeva GitHub Repository](#)
 - a. Click on the **ZIP** button as indicated in the snapshot below. This should start a Zip file download to your local hard drive



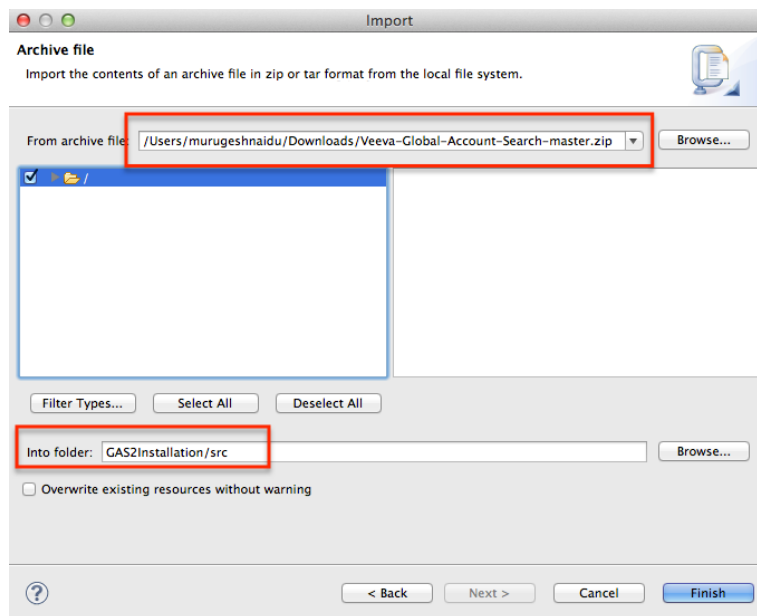
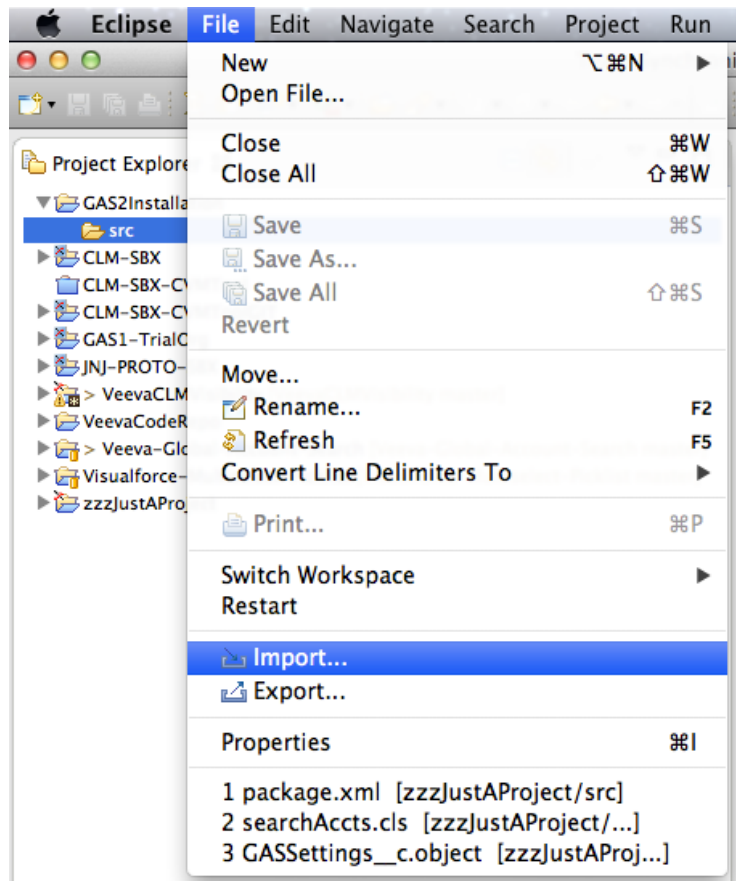
2. Use the following snapshots to review the flow via Eclipse for the remaining steps of the installation
 - a. Create a blank General Project in Eclipse

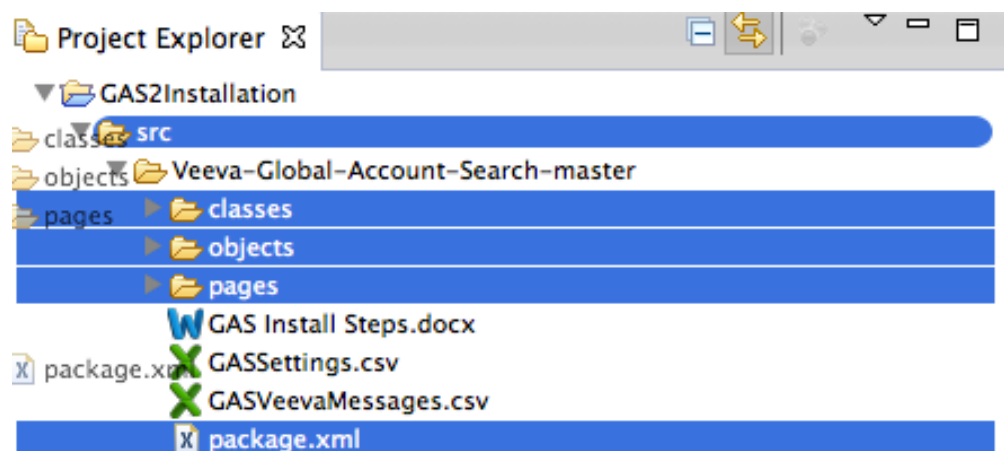
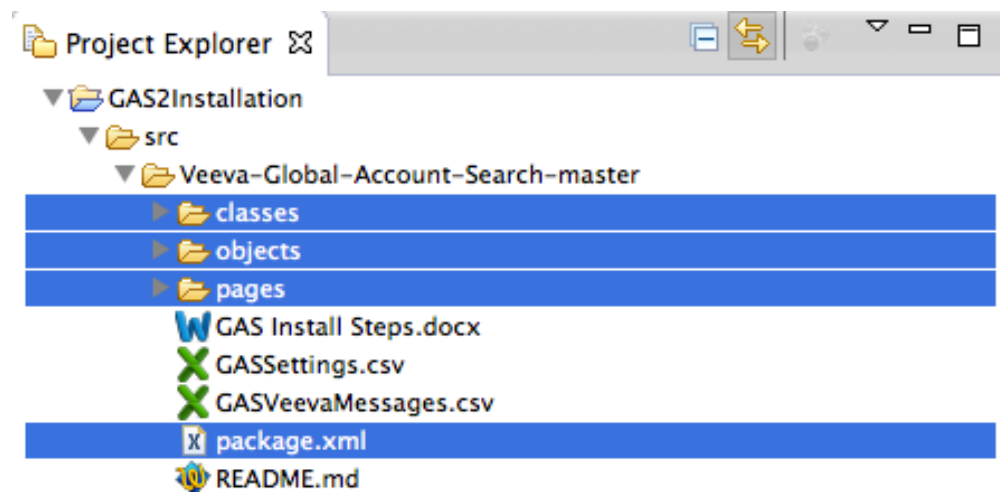
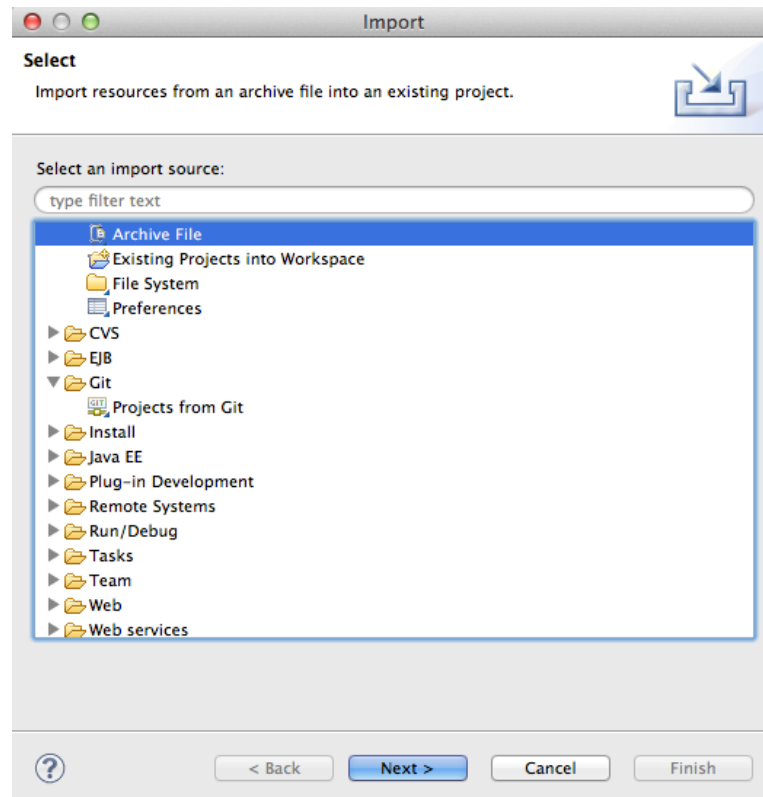


- b. Create a folder called "src" under this blank project

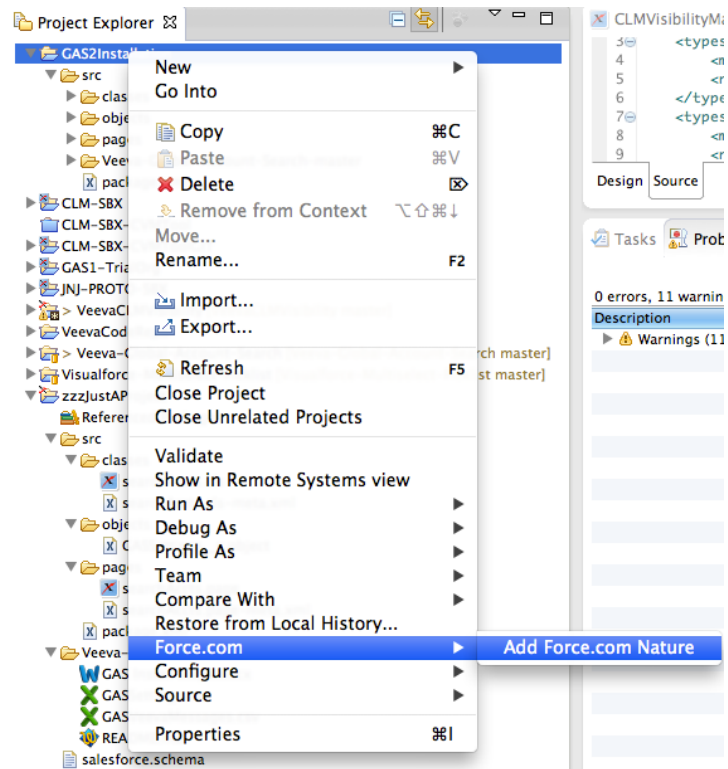


- c. Import the Zip file downloaded from GitHub into the **src** folder. You will need to move over the files from the base folder into the src folder (don't forget to include the package.xml)

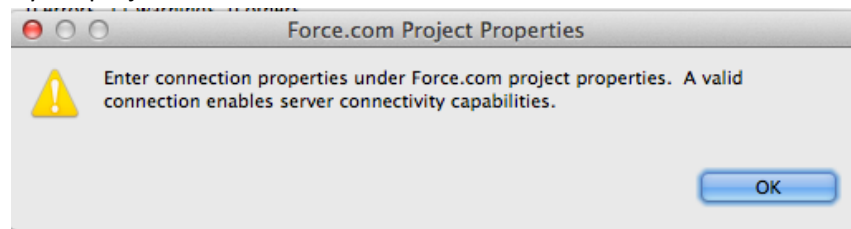




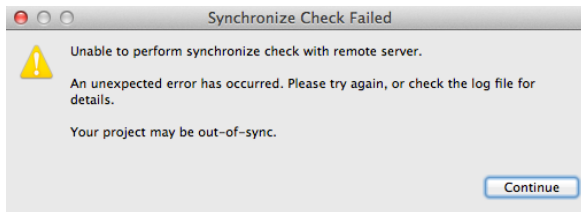
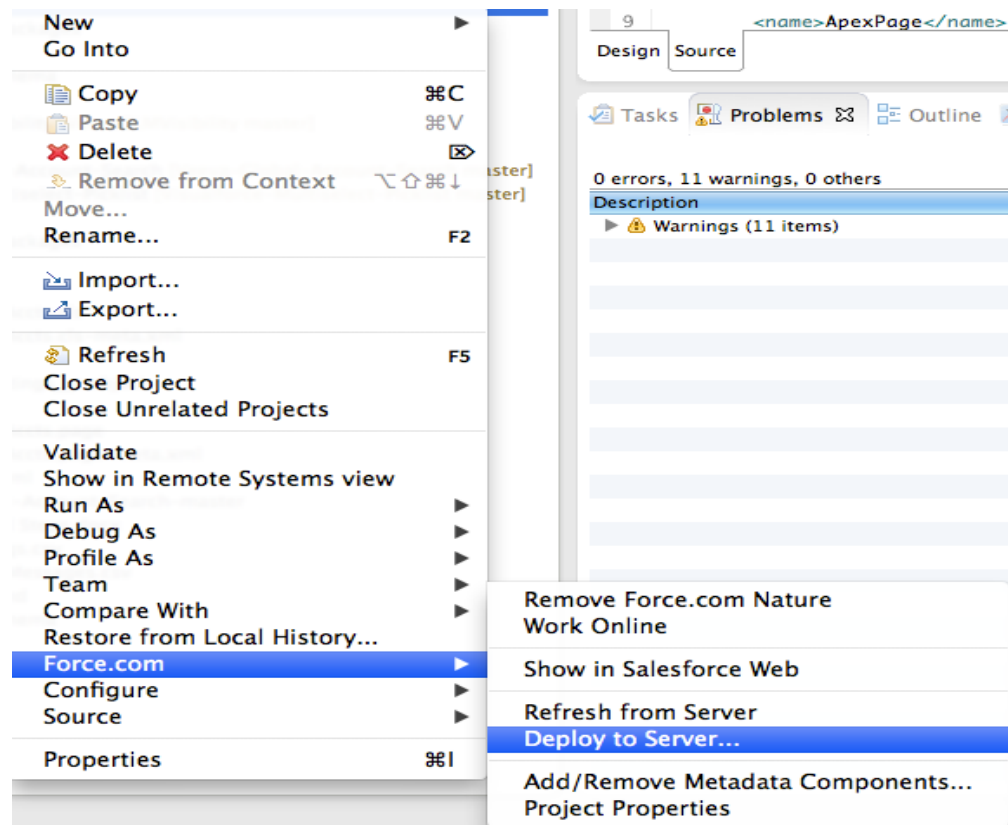
d. Add Force.com nature to your project



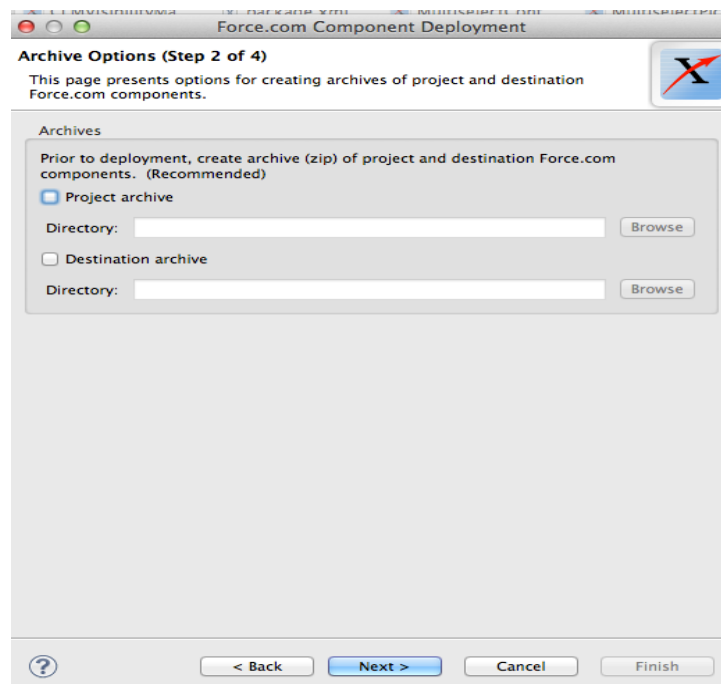
- e. Eclipse will provide an informational message as follows once you add the Force.com nature to your project



- f. Right click on the **src** folder and choose Deploy to server and enter the destination server details. Ignore and continue the warning about Sync check failure



g. Uncheck the “Destination archive” option



h. Click Next to deploy or “Validate” to just check if there are any errors in Deployment

Force.com Component Deployment

Deployment Plan (Step 3 of 4)

Results below compare project and destination Force.com components.
Configure the deployment plan by selecting actions to perform on destination Force.com components.

Found 6 deployment candidates

Apply Action?	Name	Package	Type
<input checked="" type="checkbox"/> Add	GASSettings__c		Custom O...
<input checked="" type="checkbox"/> Add	searchAccts		Apex Class
<input type="checkbox"/> No Action	GAS Install Steps		Unknown
<input type="checkbox"/> No Action	GASSettings		Unknown
<input type="checkbox"/> No Action	GASVeevaMessages		Unknown
<input type="checkbox"/> No Action	README		Unknown

Select All Deselect All Refresh Plan Click on row for description


Click to perform deployment test of selected Force.com components to destination. No changes will be committed.

Validate Deployment

Clicking NEXT will execute the deployment plan.

? < Back Next > Cancel Finish

- Expand the zip file downloaded in step 1 and using standard SFDC Data Loader, use the contained CSV files to data load the Custom Settings (GASSettings.csv) and Veeva Messages (GASVeevaMessages.csv) associated with GAS. You may also choose to use the [SFDC Workbench Website's Data → Insert](#) option as show in snapshot below.

workbench  info queries **data** migration utilities

MURUGESH NAIDU AT JANSSEN PHARMACEUTICALS VERSION 3.0.25 ON API 27.0

Select an action to perform:

Jump to:

Object:

Select

Requested in 0.172 sec
Workbench 27.0.5

4. At this point, GAS is installed and ready for use with some minimal configuration. The actual configuration steps may vary based on your preference. But here is an outline of what needs to be done:

- a. Create a VisualForce tab and point the tab to the VisualForce page called *searchAccts.page* (*Setup → Create → Tabs → New - under VisualForce tabs*)
- b. Change default tab visibility as needed
- c. Navigate to *Setup → Develop → Pages* and go to the *searchAccts.page*. Click the “Security” link and add any required Profiles that need visibility to the GAS tab
- d. Clear Veeva Cache (optional)

GAS 2.1 Installation using Workspace

If you are upgrading to GAS 2.1 (which is most likely the case), please check out the [Upgrade instructions](#) to take the necessary backups.

From [GAS 2.0 Installation](#) notes using the workbench, please follow steps **1 through 6**.

7. Expand the zip file downloaded in step 1 and using standard SFDC Data Loader and locate the folder called “documents”. Use the CSV file named “GAS_Hierarchical_Custom_Setting_Org_Level_Instance.csv” to data load the new Hierarchical Custom Settings at the Org Level and Veeva Messages (Custom Setting Table name is **GAS_Hierarchical_Setting__c**) associated with GAS. You can use default data mapping within the data loader
 - a. You may also choose to use the [SFDC Workbench Website’s Data → Insert](#) option. Alternatively, you may also choose to simply create an Org Level instance of the **GAS_Hierarchical_Setting__c** via the UI (*Setup → Develop → GAS Hierarchical Setting → Manage → New (Org Level)*)
 - b. If you wish to provide different messages and/or Input/Result fields on the UI by User or Profile, you can choose to create User/Profile level custom setting instances of **GAS_Hierarchical_Setting__c**
 - c. If you are upgrading to GAS 2.1 and you have updated any of the default legacy Veeva GAS Messages or Custom Setting values, please ensure to use the Mapping table provided in [Appendix A](#) to ensure you are correctly moving over those changes to the new Hierarchical settings
8. At this point, GAS is installed and ready for use with some minimal configuration. The actual configuration steps may vary based on your preference. But here is an outline of what needs to be done:
 - a. Create a VisualForce tab and point the tab to the VisualForce page called *searchAccts.page* (*Setup → Create → Tabs → New - under VisualForce tabs*)
 - b. Change default tab visibility as needed
 - c. Navigate to *Setup → Develop → Pages* and go to the *searchAccts.page*. Click the “Security” link and add any required Profiles that need visibility to the GAS tab
 - d. Clear Veeva Cache (optional)

GAS 2.1 Installation using Eclipse

If you are upgrading to GAS 2.1 (which is most likely the case), please check out the [Upgrade instructions](#) given in the next section to take the necessary backups.

From [GAS 2.0 Installation](#) notes using the workbench, please follow steps **1 through 2**.

3. Expand the zip file downloaded in step 1 and using standard SFDC Data Loader and locate the folder called “documents”. Use the CSV file named “GAS_Hierarchical_Custom_Setting_Org_Level_Instance.csv” to data load the new Hierarchical Custom Settings at the Org Level and Veeva Messages (Custom Setting Table name is **GAS_Hierarchical_Setting__c**) associated with GAS. You can use default data mapping within the data loader
 - a. You may also choose to use the [SFDC Workbench Website’s Data → Insert](#) option. Alternatively, you may also choose to simply create an Org Level instance of the **GAS_Hierarchical_Setting__c** via the UI (*Setup → Develop → GAS Hierarchical Setting → Manage → New (Org Level)*)
 - b. If you wish to provide different messages and/or Input/Result fields on the UI by User or Profile, you can choose to create User/Profile level custom setting instances of **GAS_Hierarchical_Setting__c**
 - c. If you are upgrading to GAS 2.1 and you have updated any of the default legacy Veeva GAS Messages or Custom Setting values, please ensure to use the Mapping table provided in [Appendix A](#) to ensure you are correctly moving over those changes to the new Hierarchical settings
4. At this point, GAS is installed and ready for use with some minimal configuration. The actual configuration steps may vary based on your preference. But here is an outline of what needs to be done:
 - a. Create a VisualForce tab and point the tab to the VisualForce page called *searchAccts.page* (*Setup → Create → Tabs → New - under VisualForce tabs*)
 - b. Change default tab visibility as needed
 - c. Navigate to *Setup → Develop → Pages* and go to the *searchAccts.page*. Click the “Security” link and add any required Profiles that need visibility to the GAS tab
 - d. Clear Veeva Cache (optional)

Upgrading GAS from previous versions

Upgrading from version pre-2.0 to version 2.0

PLEASE NOTE!! If you have client specific customizations done either in the VisualForce page or the Apex class, please do not upgrade unless you are comfortable incorporating the pre and post code artifacts. Please contact Tech Services (Wayne Abbott/Murugesh Naidu) to get a resource to help you with this transition.

1. Back up the Apex class searchAccts.cls and Visualforce page searchAccts.page
2. Follow the Installation procedure described in previous sections to install GAS 2.0 to install the meta-data package, but do not need to upload any data CSVs as you would already have these Custom settings correctly configured
3. The only update needed is Custom Setting:GASSettings__c. Ensure that the field “Track_Alignment_History__c” is clearly checked or unchecked. Checking this enables capture of GAS Territory Alignment history. Although this field has a default value of Unchecked, if you simply do a meta-data update (by way of GAS 2.0 Install), this field may still be null and hence you must explicitly check/uncheck this field
 - a. To update this field, go to *Setup* → *Develop* → *Custom Settings* → *GAS Settings* → *Manage* → *Main* → *Edit* and check the Track_Alignment_History__c checkbox.

Upgrading from version pre-2.0/2.0 to version 2.1

PLEASE NOTE!! If you have client specific customizations done either in the VisualForce page or the Apex class, please do not upgrade unless you are comfortable incorporating the pre and post code artifacts. Please contact Tech Services (Wayne Abbott/Murugesh Naidu) to get a resource to help you with this transition.

1. Back up the Apex class searchAccts.cls and Visualforce page searchAccts.page
2. Follow the Installation procedure described in previous sections to install GAS 2.1 to install the meta-data package, but do not use the CSV file to upload the GAS Hierarchical Custom Settings
3. Use the mapping tables given in Appendix A to ensure you have correctly migrated your settings data to the new Hierarchical Custom settings. All of the field names in the new settings keep their legacy names, however the table below should help put things in more specificity
 - a. Pre GAS 2.1, the settings were only possible at Org Level. So any migration to 2.1 will always only involve one (1) instance of **GAS_Hierarchical_Setting__c** that would need to be inserted
4. After migrating the legacy GAS Veeva Messages and GAS Custom Settings to the new GAS Hierarchical Custom settings and ensuring GAS is functioning as desired, you may chose to delete the GASSettings__c and the records relating to the GAS Veeva Messages (Message_vod__c)
 - a. Please note that the GAS Veeva Messages listed below are the default messages. If you have modified these messages, then please use the modified value

APPENDIX A

GAS2.1 to pre 2.1 Settings Mapping 1

GAS_Hierarchical_Setting__c Field API Name	Legacy Object.Field/Veeva Message (GASSettings__c = GS)	Comments
Account Search Field Set _c	GS.Account Search Field Set _c	
Address Search Field Set _c	GS.Address Search Field Set _c	
Do Criteria Based Filtering _c	Do Criteria Based Filtering _c	New to 2.1
Include Public Group based filtering _c	Include Public Group based filtering _c	New to 2.1
Result Field Set _c	GS.Result Field Set _c	
Show All Addresses _c	GS.Show All Addresses _c	
Track Alignment History _c	GS.Track Alignment History _c	
GAS MESSAGE CANCEL _C	Cancel	
GAS MESSAGE SEARCH _C	Search	
GAS MESSAGE LOOKUP _C	Lookup	
GAS MESSAGE MANYALIGN _C	You are currently aligned in more than one territory	Message_vod.Text_vod field
GAS MESSAGE NAMESEARCH _C	You may not search on both Name and First/Last Name	Message_vod.Text_vod field
GAS MESSAGE NOCRITERIA _C	No search criteria entered	Message_vod.Text_vod field
GAS MESSAGE NOMATCH _C	No matching records found. Please modify your search criteria	Message_vod.Text_vod field
GAS MESSAGE NONE _C	-None-	Message_vod.Text_vod field
GAS MESSAGE NOTALIGNED _C	You are currently not aligned in any territories	Message_vod.Text_vod field
GAS MESSAGE RESULTS _C	Results	Message_vod.Text_vod field
GAS MESSAGE SELECT _C	Select	Message_vod.Text_vod field
GAS MESSAGE SFA _C	Search For Account	Message_vod.Text_vod field
GAS MESSAGE SFPA _C	Search For Parent Account	Message_vod.Text_vod field
GAS MESSAGE SUCCESS _C	The customer has been successfully added to your territory	Message_vod.Text_vod field
GAS MESSAGE STARTS WITH _C	Starts With	Message_vod.Text_vod field
GAS MESSAGE TOO MANY _C	More than 20 records found. Please narrow your search criteria	Message_vod.Text_vod field
GAS MESSAGE ATT _C	Add To Territory	Message_vod.Text_vod field
GAS MESSAGE CLEAR _C	Clear	Message_vod.Text_vod field
GAS MESSAGE CONTAINS _C	Contains	Message_vod.Text_vod field
GAS MESSAGE EM _C	Exact Match	Message_vod.Text_vod field
GAS MESSAGE INTERRUPT _C	The customer is already in your territory. No changes made	Message_vod.Text_vod field
Align Multiple Territory _c	Align Multiple Territory _c	New to 2.1

APPENDIX B – Contacts and Resources

- ❖ Murugesh Naidu (Global Account Search Product Manager/Developer)
- ❖ Jeff Kelso (Global Account Search Developer)
- ❖ Wayne Abbott (Tech Services Practice Manager)
- ❖ Chatter Group to post feature requests, installation issues, concerns or just plain old comments:
[Global Account Search](#)
- ❖ Tech Services Website: <https://sites.google.com/a/veevasystems.com/technical-services/>