



VEEVA APPROVED EMAIL

User Training Manual

Executive Summary

The document provides insights and guidelines on how to best use Veeva Vault and more precisely on how to approach Approved Email within Veeva controlled environment, Vault. While Vault is only a piece of a much broader eco-system (Veeva), including different "components" or channels to communicate with HCP's (hereafter named "Accounts"), it's also the main platform used to send 1-to-1 emails to the HCP.

This document will emphasize on different problematics encountered in Vault and will focus on the best practices

- Introduction: what is VEEVA and how to access the platform
- Document types: description, roles and usage
- Theoretical hands-on:
 - Templates & fragments: how to create them: naming conventions, required fields, importing HTML and assets, etc.
 - Templates vs. fragments, how-to use them and link them together, how to use related pieces
 - Merge fields and Veeva dynamic tags
 - How to test emails (Litmus)
- Tips and tricks & best practices, templates validation
- Synchronization and sending process through CLM

Note that enclosed examples refer to Adagio sandbox, which could very slightly differ from Janssen sandbox, however steps detailed later in this document should be mainstream and therefore apply to Janssen sandbox as well.

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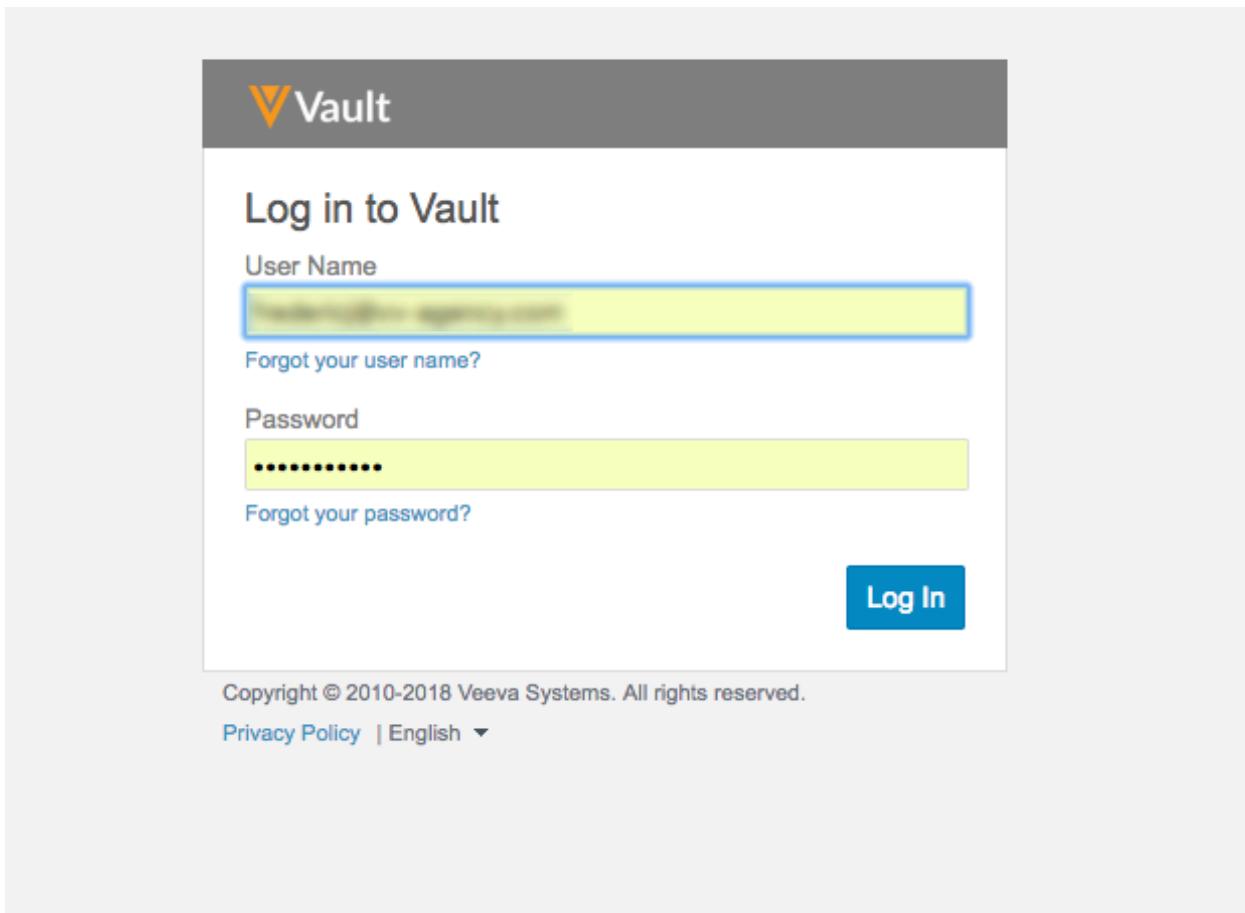
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Introduction

Veeva Vault

VEEVA Vault is a component, part of the Veeva CLM suite where user can load Multichannel assets, such as email templates, fragments, documents, etc. and eventually link them with CLM Key Messages (slides) through the Approved Email feature (in VEEVA CLM). In the following document, we will refer to Adagio VEEVA Vault and VEEVA CLM (Salesforce.com) towards the Approved Email functionality.

To access your instance of VEEVA Vault (Janssen), use the credentials you obtained or self-generated at first logon.



Once logged in, you should be able to review tasks that have been assigned to you, if any. To proceed and start using Approved Email functionality, click on the "Library" entry of the menu header.

The main interface is split into 3 main navigation panes:

- The top header includes a filterable- and free-search field, the main navigation menu and access to profile-related features
- The left pane includes filterable search tools useful to organize document types
- The central pane details Documents you are granted access to

You can filter the type of documents as well the products using the panel on the left. There are different types of documents we are going to use:

→ Email Templates: these are the main containers used across templates

→ Email Fragments: these are HTML snippets we can attach to one or more email templates. Email fragments are by definition reusable across multiple email templates. They are optional pieces of content that can be inserted within templates when using iPad Veeva CLM application.

→ Template fragments: template fragments work the same way as email fragments for the architecture part (HTML snippets), however they are automatically inserted within main templates (i.e. footers) once attached to a specific template.

→ Promotional Pieces: these are documents we can attach to templates and email fragments.

Notes:

- PROMOTIONAL PIECES, DOCUMENTS, TEMPLATE- and EMAIL FRAGMENTS are optional components. An Email Fragment can just contain HTML text/code and/or a CTA with no additional link towards external documents or Veeva-hosted documents.
- As such a template fragment is interesting if:
 - You want to use multiple identic HTML snippets in various Email Templates (reusability)
 - You want to let the opportunity to the sales rep choose which fragments to include in the email template. This is particularly powerful if you offer a large variety of content-related fragments, which the sales rep can choose among and select the right message to the account.

Typical structure of an email template

VEEVA Vault does not require any specific naming convention. However related materials such as Email Templates and Fragments should be left organized. In addition, naming conventions, titles and other labels used across materials should comply with Janssen guidelines. Please refer to your manager for more information about naming and labeling conventions.

The same principle applies to organizing sources and assets. Although VEEVA Vault does not require a specific structure and file organization, please refer to your manager for file naming and organization conventions. Below is an example of organized email templates along with its fragments and assets.

Since we are going to edit the main template (i.e. insert fragment placeholders), the final preview will not render correctly. As such, it is a good idea to keep a copy of the original email template without fragment placeholders.

Example of desktop generic template:

ADAGIO 

`{{customText[Dear Doctor|Dear Professor]}}`
`{{accLname}},`

As a follow-up to our previous meeting, I'm sending you herewith **the requested documents**. You can download any of these documents by clicking on the **following link**.

`{{insertEmailFragments}}`

Should you need any additional document or information about our services not enclosed in this communication, please do not hesitate to **contact me personally**.

I'm looking forward to our next meeting,

`{{userPhoto}} {{userName}}`
`{{User.Title}}`
`{{User.MobilePhone}}`
`{{userEmailAddress}}`



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NS ID : 877510 Revision date 04/2018

Next to the desktop generic template, agencies delivering templates should be aware of responsiveness. This means template should scale automatically depending on the device used.

ADAGIO 

`{{customText[Dear Doctor|Dear Professor]}}`
`{{accLname}},`

As a follow-up to our previous meeting, I'm sending you herewith **the requested documents**. You can download any of these documents by clicking on the **following link**.

`{{insertEmailFragments}}`

Should you need any additional document or information about our services not enclosed in this communication, please do not hesitate to **contact me personally**.

I'm looking forward to our next meeting,

`{{userPhoto}}
{{userName}}
{{User.Title}}
{{User.MobilePhone}}
{{userEmailAddress}}`



Click here to view our latest whitepaper covering our vision about **Marketing Automation**, as well as some of our most relevant **Customer Stories**.

ADAGIO

Additionally, don't hesitate to visit Adagio website to get more insight about **services offered by Adagio** to the life science industry.

[adagio.company](#)

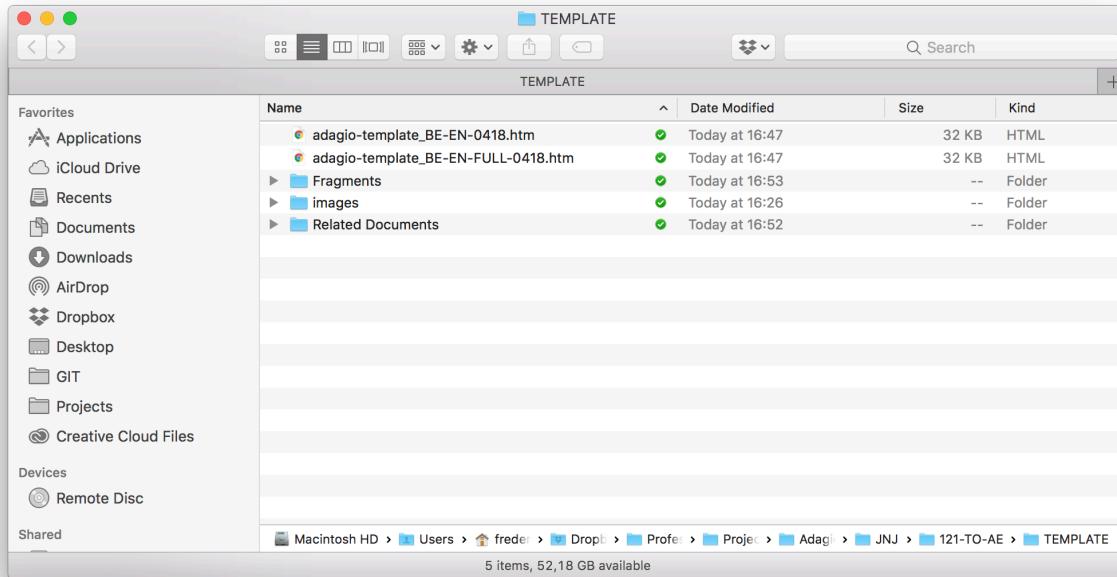
ADAGIO 

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Keeping the sources organized in a consistent manner:



The main HTML template is located on top of the structure while Fragments, assets as well as other Related documents are kept organized in sub-folders.

From the example template above, we can notice multiple information:

1- Personalization

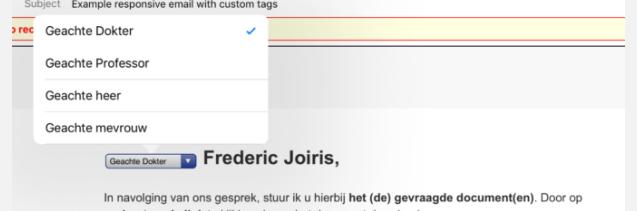
The template can be customized on the Account level (HCP) when it is properly selected amongst available accounts. The following matrix gives information about Veeva replacement tags (known in iConnect as merge fields) and how they resolve

Account field	iConnect merge field	Veeva Approved Email	Example
CODSID	{!Account.CODS_External_Id__c}	{{Account.CODS_External_Id__c}}	
Last Name	{!Account.LastName}	{{accLname}}	John

First Name	{!Account.FirstName}	{!accFname}	Doe
First Name Last Name	{!Account.Name}	{!Account.Name}	John Doe
Title	{!Account.PersonTitle}	{!accTitle}	Dr.
Salutation	{!Account.Salutation}	{!Account.Salutation}	Mrs.
Specialty 1	{!Account.Specialty_1_JJ__c}	{!Account.Specialty_1_JJ__c}	General Medicine
Specialty 2	{!Account.Specialty_2_JJ__c}	{!Account.Specialty_2_JJ__c}	Oncology
Email	{!Account.PersonEmail}	{!Account.PersonEmail}	John.doe@mail.com
Alternate email	{!Account.Email_JJ__c}	{!Account.Email_JJ__c}	John.doe@mail.com
Phone number	{!Account.JJ_Phone_1__c}	{!Account.JJ_Phone_1__c}	+44 00000000

2- Customization

Next to personalizing the template with account-level fields, you can also specify fields to which, the sales reps will be able to choose among. These fields must be given a value when the email is being sent, otherwise a default (fallback) value will be used. Herewith most important customization fields used among the templates

Veeva field	Veeva Approved Email	Example
Custom Text with multiple choice (select)	<code>{{customText[Option 1 Option 2 Option X]}}</code>	<p>This field generates a Select field box in the Veeva CLM application. Note that the select field will also default to Option 1, if no other option is selected by the Rep.</p>  <p>In navolging van ons gesprek, stuur ik u hierbij het (de) gevraagde document(en). Door op onderstaande link te klikken, kan u het document downloaden.</p>
Custom Text with free-text field	<code>{{customText(field_length defaultFallback)}}</code> Example: {{customText(100 Thank you for your attention during my visit.)}}	<p>This field generates a Free-text field box in the Veeva CLM application.</p> <p>Note that the field will also default to the specified fallback automatically. Also, note that the field box will have a default size, unless its width is set using CSS styles.</p> <p>Example of default size:</p>  <p>Example of size with CSS styling:</p> 

		<p>To achieve this, the agency creating the template should add a specific rule in the CSS part of the template, i.e.:</p> <pre>Input{text} { Width: 100%; }</pre> <p>This rule will ensure the free-text field takes 100% of width space it is contained in.</p>
--	--	---

3- Information about the rep

It's interesting to add information about the sales rep. This gives a feeling that the email is really personalized and meant to the selected account. Herewith the matrix with all Veeva tags you can use for specifying information about the sales rep.

User field	iConnect merge field	Veeva Approved Email	Example
Last Name	{!User.LastName}	{{User.LastName}}	John
First Name	{!User.FirstName}	{{User.FirstName}}	Doe
First Name Last Name	{!User.Name}	{{userNamed}}	John Doe
Title	{!User.Title}	{{User.Title}}	Brand Manager XXX
Salutation	{!Account.Salutation}	{{Account.Salutation}}	Mrs.
Email	{!User.Email}	{{userEmailAddress}}	John.doe@its.jnj.com
Mobile	{!User.MobilePhone}	{{User.MobilePhone}}	+44 00000000
Phone number	{!User.Phone}	{{User.Phone}}	+44 00000000
Fax number	{!User.Fax}	{{User.Fax}}	+44 00000000

Photo¹	N/A	<code>{{userPhoto}}</code>	
--------------------------	-----	----------------------------	--

4- Email and Template Fragments

Email and Template fragments are referred to using the following tags wherever required in the template: `{{insertEmailFragments}}` (for Email Fragments) and `{{emailTemplateFragment}}` (for Template Fragments). This tag will indicate Veeva how to handle specific blocks of. We will show later in this document how Email and Template Fragments can be used to further customize an email.

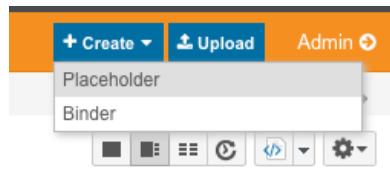
Remember that it's a good idea to keep of copy of the original template, with fragments included in order to get a preview of the real email template and how it will look like when it's being sent to the HCP.

¹With Veeva Approved Email, you can personalize the template and specify a picture of the Rep to show wherever you need in the template. However, this requires upfront setup of the Veeva environment, as well as steps in the Veeva CLM application. Please contact your Veeva Administrator to know how to use `{{userPhoto}}` tag within templates.

Importing an Email Template in Vault – Classic way

There are 2 different options when importing an **Email Template** in Vault. The first option (individual) uses the Placeholder functionality of Vault. The second option will be elaborated later on in this document and can be useful when importing multiple templates at once (batch import).

- Click **+ Create** on top of the page and select "**Placeholder**"



- Select **Email Template** from the list and click **Next**

Please note that the list of available document types might vary depending on your setup and access rights. However, most relevant document types should always be part of the list (**Email Fragment**, **Email Template**, **Template Fragment**).

A screenshot of the 'Create Placeholder (Step 1 of 2)' dialog. The title bar says 'Create Placeholder (Step 1 of 2)'. Below it, a section titled 'Choose document type' has a 'Type*' label and a dropdown menu. The dropdown menu is open, showing a list of document types: 'Please select', 'Master Email Fragment', 'Email Fragment', 'Email Template', 'Promotional Piece', 'Reference Document', 'Multichannel Slide', and 'Template Fragment'. The 'Please select' option is checked. At the bottom of the dialog, there is a footer with the Vault logo, 'Privacy Policy', and 'Help' links.

General Properties*

Name* Template Name

Title Template Title (optional)

Type Email Template

Email Template Type Standard Template

Version 0.1

Country* Belgium 

Language* English

CRM Territory

Restrict Fragments by Product* Yes No

Reference Number

Product Information*

Product* Darzalex_BE 

Indication/ disease area

Email Fields*

From Address* {{userEmailAddress}}

From Name {{userUserName}}

Reply To Address {{userEmailAddress}}

Reply To Name {{userUserName}}

Subject* Template subject as it will appear in HCP mailbox. Note that you can include personalisation tags as well.

Email Domain

Complete the required fields:

- Name: template name. Check with your VEEVA administrator for the nomenclature.
- Country: select correct value from the list. Note that if you start typing the country name, Veeva will automatically suggest relevant results (auto-complete).
- Product: select correct value from the list. Note that if you start typing the name of the product, Veeva will automatically suggest relevant results (auto-complete).
- Email Fields, use the following values
 - a. From Address: {{userEmailAddress}}
 - b. From Name: {{userUserName}}
 - c. Reply To Address: {{userEmailAddress}}
 - d. Reply To Name: {{userUserName}}
 - e. Subject: template subject as it will appear in HCP mailbox. Note that you can include VEEVA personalization tags as well.

➤ Click on **Save** to save the new template.

The HTML file and package uploads must be performed separately as 2 separate steps because Veeva needs to know which kind of template we are using. Click on **Upload File** and select [the main template HTML file](#) (not fragment HTML files).



This placeholder has no content.

Upload File

Files for upload cannot exceed 4GB in size. Video files cannot exceed 2GB. [Learn more.](#)

Once upload has successfully completed, you should see a bare preview of the template. Since we did not upload the assets package (i.e. containing images), the template should not contain any images.

The screenshot shows a template editor interface. At the top, there are three buttons: 'Annotate' (with a checkmark), 'A' (for font), and 'C' (for color). Below these are two sections labeled 1 and 2. Section 1 contains the word 'Adago'. Section 2 contains the following text:

```
 {{customText[Dear Doctor|Dear Professor]}}
 {{accLname}},

 {{customText(255|Thank you for your attention during our
 interview.)}}
```

Below this, there is a note: "As a follow-up to our previous meeting, I'm sending you herewith the requested documents. You can download any of these documents by clicking on the following link." followed by a link placeholder: "{{insertEmailFragments}}". There is also a note: "Should you need any additional document or information about our services not enclosed in this communication, please do not hesitate to contact me personally." and a closing remark: "I'm looking forward to our next meeting." At the bottom, there is a placeholder for a user photo with the text "alt text image" and a link to a whitepaper: "Click here to view our latest whitepaper covering our ideas about **Marketing Automation**, as well as some of our most relevant **Customer Stories**". At the very bottom, there is a '0 Comments' button.

- Select Assets option from the right panel
- Click on the + to add your package containing the Assets. The name of the package does not matter, however it must be a compressed ZIP file.



- Select the ZIP package linked to the template and click on upload. After a short while, the file should be uploaded. Veeva will generate a new rendition and provided assets.zip was correctly uploaded, images should now appear correctly.

▼ Assets (1)

Assets
File Size: 146.6 KB
Uploaded on: 19/04/2018 08:37 CEST

ADAGIO

1
2

```

{{customText[Dear Doctor|Dear Professor]}}
{{accLname}},

{{customText(255|Thank you for your attention during our
interview.)}}


As a follow-up to our previous meeting, I'm sending you herewith the requested documents.
You can download any of these documents by clicking on the following link.

{{insertEmailFragments}}


Should you need any additional document or information about our services not enclosed in this
communication, please do not hesitate to contact me personally.

I'm looking forward to our next meeting.

{{userPhoto}} {{userName}}
{{User.Title}}
{{User.MobilePhone}}
{{userEmailAddress}}

```

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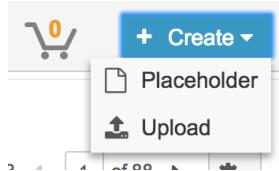
0 Comments

- These operations are automatically saved so you can leave the template at this stage if you're done.

Importing an Email Template in Vault – Batch

Importing with batch mode in Vault allows you to upload multiple templates at once, provided these templates have the same document type (i.e. Email Template).

In addition, and since Vault does not know what you are importing, it is important to identify template names with an easily identifiable filename. I.e. if all templates you are importing have the same name (i.e. template.html), it will be more difficult afterwards to set proper values for the specific templates.



- Select **Upload** under **Create** option menu.

A screenshot of the 'Upload Files (Step 1)' screen. At the top, there is a large dashed blue rectangular area labeled 'Drag and drop files to upload here'. Below this, a green bar contains the text 'or choose files to upload' and a 'Choose' button. To the right of the upload area, a message says 'No files selected for upload'. Further down, there are classification options: 'Classify documents later' (radio button) and 'Classify documents now' (radio button, which is selected). A search bar for 'Choose document type' is shown, with 'Email Template' typed into it. At the bottom right are 'Cancel' and 'Next' buttons.

- Choose local (HTML) files you want to upload or drag-drop them in the blue area on top of the screen.

A screenshot of the 'Upload Files (Step 1)' screen, identical to the previous one but with two files selected for upload. On the right side, a sidebar shows a list titled '2 classified document(s) to be uploaded' with two items: 'adagio-template_BE-EN-0418.htm' and 'adagio-template_UK-EN-0418.htm'. Both files have small delete icons next to them. The rest of the interface is the same as the first screenshot.

- You may choose to classify documents later on (i.e. specify a category for them), however since we are uploading only templates for now, we can choose to select the right category immediately (in this case: **Email Template**).

Note that it is important to choose the right document type upon upload, although you can always reclassify documents later and specify an other category for each.

If you are unsure of which type of document you are important, it might be best to not have them classified during upload process, since this operation can be performed at a later stage.

The screenshot shows the 'Upload Files (Step 2)' interface. On the left, there are two file thumbnails: 'adagio-template_BE-EN-041...htm' and 'adagio-template_UK-EN-041...htm', both showing a warning icon and a size of 32KB. On the right, the 'General' tab is active, displaying various configuration options. Key fields include:

- Name***: Disabled in multiselect.
- Title**: Disabled in multiselect.
- Type**: Email Template
- Batch Number**: (empty)
- Email Template Type**: (dropdown menu)
- Version***: 0.1
- Country***: (highlighted in yellow)
- CRM Territory**: (empty)
- Restrict Fragments by Product***: Yes (radio button selected)
- Survey**: (empty)

Below the General tab, other sections like 'Portal Details', 'CLM Properties', 'Product Information*', and 'Email Fields*' are visible, each with its own set of fields.

- Once upload has completed, you can update all common fields to those documents. Notice that some fields (such as name or title) can be edited at this stage, because these are individual fields.

Refer to the previous section about importing templates using the individual upload for further instructions.

Conclusion

Importing templates in Veeva Vault is pretty much straight-forward. We have seen how to import them as batch files (many documents at once), and individually. Each method has its pro's and con's which are listed below:

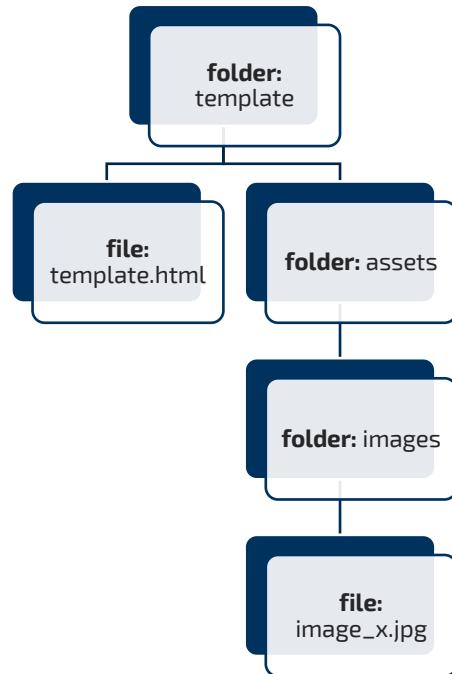
	Pro's	Con's
Batch import	<ul style="list-style-type: none">➤ Import multiple documents in a single operation➤ Specify fields that are common to imported documents in a single operation	<ul style="list-style-type: none">➤ Requires each document that is being imported to have a relevant and distinct name, otherwise they are difficult to identify once uploaded➤ Still requires some individual updates (i.e. assets upload)
Individual import	<ul style="list-style-type: none">➤ Create a complete Veeva document at once➤ Specify all fields and assets during creation➤ Approve the document at once	<ul style="list-style-type: none">➤ Time-consuming since each operation is individual

As we can see, **batch import** can and should be used if you have large amount of documents to upload at once, however each document should have a clearly-identified name to make them easier to identify; while **individual export** has the advantage of enabling all steps towards document creation, up to approval.

Creating the assets.zip file

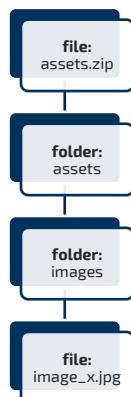
Important remark: assets such as images, CSS files, etc. must reflect the same structure and location specified in the HTML template, otherwise Veeva will fail displaying and using linked assets.

Example: assuming the following template structure of an email template:



Template.html will refer to images located under images folder with the following location: because image_x.jpg is located 2 folders beneath location of template.html

In this case, **the assets folder must be compressed**, and not its content nor child content of it, because Veeva will reflect the exact location specified in the template. In this very example, the ZIP file should reflect the following contents:



Best practices on using assets and external documents

Although images, CSS or other template related documents can be hosted externally (i.e. in iConnect, Eloqua, etc.), best practices dictates to have Veeva host all assets attached to a templates, since it might improve tracking options and overall performance of the template.

In addition, it's very important that templates can rely on 1 platform to support all its assets, since future migration would be much easier to accomplish.

Using Email Fragments

Email Fragments are an important part of Veeva Approved Email. They allow agencies to create HTML snippets that can be reused across different email templates. In addition, sales reps can manipulate them when sending approved emails through Veeva CLM.

- Email Fragments use a specific Veeva Tag shown in the HTML snippet below

```
<table width="100%" border="0" cellspacing="0" cellpadding="0">

<tr>

<td width="20" class="half">&nbsp;</td>

<!-- -->

<td align="center" valign="top" style="font-family: Arial, sans-serif; font-size:16px; text-align:left; color:#2c2c2c; line-height:35px;">

{{insertEmailFragments}}
```

</td>

```
<td width="20" class="half">&nbsp;</td>

<!-- -->

</tr>
```

</table>

Note that you can have only 1 {{insertEmailFragments}} directive within an email template. You will be able to reference the email fragments later on when editing the template.

Once the **Email Fragment** is created, correctly uploaded and attached to an email template, it will display in Veeva CLM as optional component. Sales Rep will then be able to select email fragments that are available for that specific template. It is very useful to display conversation-specific information to the HCP. Email fragments can contain:

- HTML code
- Link to a PDF file hosted in Veeva or any external platform
- Link to Engage landing page
- Etc.

Note that the fragment must be enclosed within a table cell tag (<td>) to work properly. Agencies should be aware of the requirements and specifications of **Email Fragments**.

Example below shows HTML code of a complex **Email Fragment**.

```
<table width="450" border="0" cellspacing="0" cellpadding="10" class="document">

<tr>

<td colspan="3" height="20"></td>

</tr>

<tr>

<td width="67" valign="top" bgcolor="#f2f0ec"><a href="{{PieceLink}}" style="text-decoration: none; color: #ed842a; font-size: 16px;"></a></td>

<td align="left" bgcolor="#f2f0ec" valign="top" style="font-family: Arial, sans-serif; text-align:left; font-weight: bold; ">

<a href="{{PieceLink}}" style="text-decoration: none; color: #ed842a; font-size: 16px;">

<span style="font-size:18px; line-height:20px; text-transform: uppercase; color:#00693c;">Mode of Action Eloqua MAP</span><br />

View Video

</a>

</td>

<td width="20" bgcolor="#f2f0ec" >&ampnbsp</td>

</tr>

<tr>

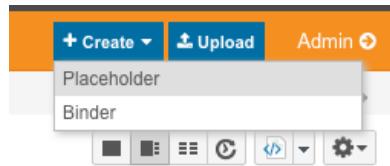
<td colspan="3" height="4"></td>

</tr>

</table>
```

Creating Email Fragments

Creating and importing **Email Fragments** (like **Template Fragments**) is pretty straight-forward and makes use of the exact same procedure as for **Email Templates**. You can therefore choose to import each fragment individually, or using batch upload. Example below refers to creation steps using individual import.



- Click **+ Create** on top of the page and select "**Placeholder**"

A screenshot of the 'Create Placeholder (Step 1 of 2)' form. The 'Type*' field has a dropdown menu open, listing various document types: 'Please select', 'Master Email Fragment', 'Email Fragment', 'Email Template', 'Promotional Piece', 'Reference Document', 'Multichannel Slide', and 'Template Fragment'. At the bottom left of the form, there's a 'Vault' logo and links to 'Privacy Policy' and 'Help'.

- Select **Email Fragment** from the list and click **Next**

A screenshot of the 'General' section of the Placeholder creation form. It includes fields for 'Name*', 'Title', 'Type' (set to 'Email Fragment'), 'Batch Number', 'Version*', 'Country*', 'CRM Territory', and 'Survey'. There are also sections for 'Portal Details' and 'Product Information*' which are currently collapsed. On the right side of the screen, there is descriptive text and a bulleted list of instructions.

Complete the required fields. You will notice the list of required fields is much shorter than for Email Templates. This is normal, since Email Fragments are not being sent or used on their own. They always depend on a parent Email Template.

- Name: fragment name. Check with your VEEVA administrator for the nomenclature.
- Country: select correct value from the list. Note that if you start typing the country name, Veeva will automatically suggest relevant results (auto-complete).
- Product: select correct value from the list. Note that if you start typing the name of the product, Veeva will automatically suggest relevant results (auto-complete).

- Click on Save
- **Uploading the HTML and attaching the assets to the Email Fragment works exactly the same way as for the Email Template.**
- You also get a preview of the **Email Fragment** when you edit it, however preview might appear broken. This is normal since **Email Fragments** use styles specified in the parent document (**Email Template**).

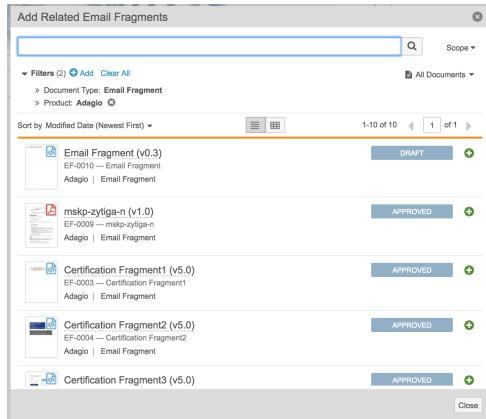
Please also refer to packaging assets folder under section related to **Email Templates**. Same requirements should apply for **Email Fragments**.

The screenshot shows the 'Email Fragment (v0.3)' interface. The left side has a preview area with a video thumbnail labeled 'MODE OF ACTION ELOQUA MAP' and a 'View Video' link. The right side is a properties panel with sections for General, Portal Details, File Info, Product Information, and Assets (1). The Assets section shows one item named 'Assets' with a file size of 7.7 KB and an uploaded date of 19/04/2018 10:35 CEST.

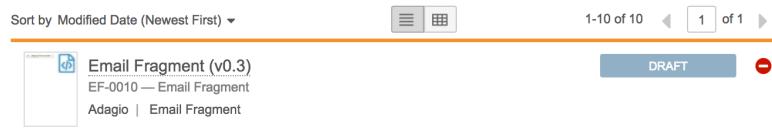
In order to work properly, **Email Fragments** must be attached to an **Email Template**, to do so, select your uploaded **Email Template** from the **Library**.

The screenshot shows the Library interface with three sections: 'Other Related Documents (0)', 'Related Email Fragments (0)', and 'Related Endorse Presentations (0)'. Each section has a blue plus icon to its right.

- Find the section titled **Related Email Fragments** in the right area of the document properties panel and click on the + icon.

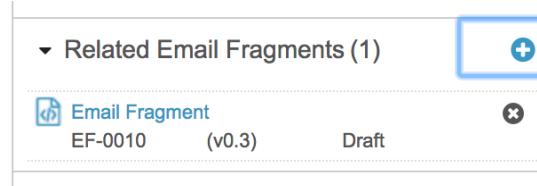


- By default, **Email Fragments** should be restricted by product (i.e. the list will display fragments that are of the same product as specified in the template). If you want to disable this, you need to **Edit the Email Template**, and change value of the radio field titled **Restrict Fragments by Product**.

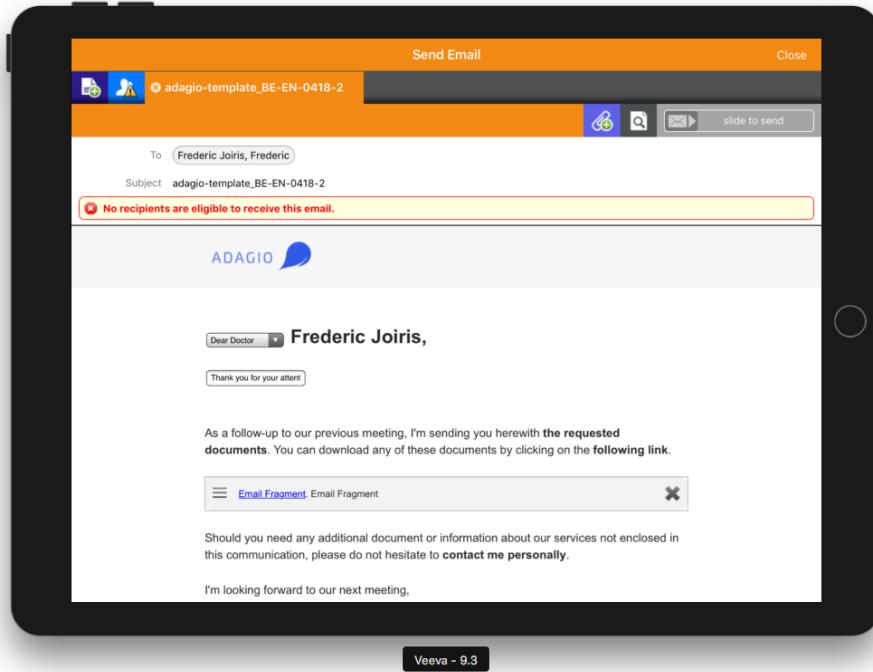


- You can add or remove as many fragments as needed by clicking the + or - icon in the list.

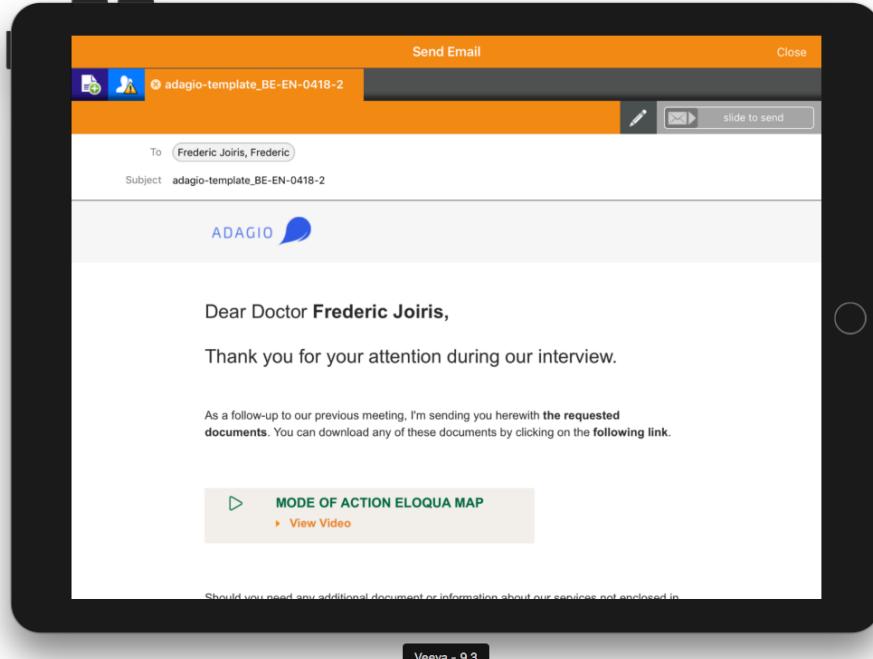
Note that just like adding assets package, you don't need to save your template after adding fragments. This operation is saved automatically by Veeva.



Important: in order to work in Veeva CLM, all **templates**, subsequent **fragments** and **documents** (PDF) must be set to **approved stage**. The document will detail later on how to set documents to **approved stage**.



- When added to templates, **Email Fragments** can be selected by the Rep before sending email to the HCP



- Preview mode shows how **Email Fragments** will render in the **HTML template**.

Using Template Fragments

Next to **Email Fragments**, you can also use **Template Fragments**. **Template Fragments** allow agencies to create HTML snippets that can be reused across different **Email Templates**. However, sales reps have no control over **Template Fragments**; a **Template Fragments** will always be included in the **Email Template** once attached. In addition, you can add only one **Template Fragment** to an **Email Template**.

- **Template Fragments** use a specific Veeva Tag shown in the HTML snippet below

```
<table width="100%" border="0" cellspacing="0" cellpadding="0">

<tr>

<td width="20" class="half">&nbsp;</td>

<!-- -->

<td align="center" valign="top" style="font-family: Arial, sans-serif; font-size:16px; text-align:left; color:#2c2c2c; line-height:35px;">

{{emailTemplateFragment}}
```

{{emailTemplateFragment}}

```
</td>

<td width="20" class="half">&nbsp;</td>

<!-- -->

</tr>

</table>
```

Note that you can have only 1 {{emailTemplateFragment}} directive within an Email Template. You will be able to reference the Template Fragment later on when editing the template.

Once the **Template Fragment** is created, correctly uploaded and attached to an **Email Template**, it will display in Veeva CLM when you select the appropriate template. **Template Fragments** can contain:

- HTML code
- Link to a PDF file hosted in Veeva or any external platform
- Link to Engage landing page
- Etc.

Opposed to **Email Fragments**, **Template Fragments** can be used for recurring content which should always be included in an **Email Template** (i.e. a header, a footer, Prescribing Information, etc.)

Note that the fragment must be enclosed within a table cell tag (<td>) to work properly. Agencies should be aware of the requirements and specifications of **Template Fragments**.

Example below shows HTML code of a complex **Template Fragment**.

```
<table width="450" border="0" cellspacing="0" cellpadding="10" class="document">

<tr>

<td colspan="3" height="20"></td>

</tr>

<tr>

<td width="67" valign="top" bgcolor="#f2f0ec"><a href="{{PieceLink}}" style="text-decoration: none; color: #ed842a; font-size: 16px;"></a></td>

<td align="left" bgcolor="#f2f0ec" valign="top" style="font-family: Arial, sans-serif; text-align:left; font-weight: bold; ">

<a href="{{PieceLink}}" style="text-decoration: none; color: #ed842a; font-size: 16px;">

<span style="font-size:18px; line-height:20px; text-transform: uppercase; color:#00693c;">Mode of Action Eloqua MAP</span><br />

View Video

</a>

</td>

<td width="20" bgcolor="#f2f0ec" >&ampnbsp</td>

</tr>

<tr>

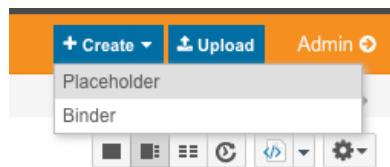
<td colspan="3" height="4"></td>

</tr>

</table>
```

Creating Template Fragments

Creating and importing **Template Fragments** (like **Email Fragments**) is pretty straight-forward and makes use of the exact same procedure as for **Email Templates**. You can therefore choose to import the fragment individually, or using batch upload. Example below refers to creation steps using individual import.



- Click **+ Create** on top of the page and select "**Placeholder**"

A screenshot of the 'Create Placeholder (Step 1 of 2)' form. The 'Choose document type' section has a dropdown menu for 'Type'. The menu is open, showing options like 'Please select', 'Master Email Fragment', 'Email Fragment', etc., with 'Template Fragment' being the selected option.

- Select **Template Fragment** from the list and click **Next**

A screenshot of the 'General' tab of the Placeholder creation form. It shows fields such as 'Name' (input field), 'Type' (set to 'Email Fragment'), 'Version' (input field containing '0.1'), 'Country' (input field), 'CRM Territory' (input field), 'Survey' (input field), 'Portal Details' (collapsible section), and 'Product Information' (collapsible section with 'Product' input field).

Complete the required fields. You will notice the list of required fields is much shorter than for Email Templates. This is normal, since Template Fragments are not being sent or used on their own. They always depend on a parent Email Template.

- Name: fragment name. Check with your VEEVA administrator for the nomenclature.
- Country: select correct value from the list. Note that if you start typing the country name, Veeva will automatically suggest relevant results (auto-complete).
- Product: select correct value from the list. Note that if you start typing the name of the product, Veeva will automatically suggest relevant results (auto-complete).

- Click on Save
- Uploading the HTML and attaching the assets to the Template Fragment works exactly the same way as for the Email Template.
- You also get a preview of the Template Fragment when you edit it, however preview might appear broken. This is normal since Template Fragments use styles specified in the parent document (Email Template).

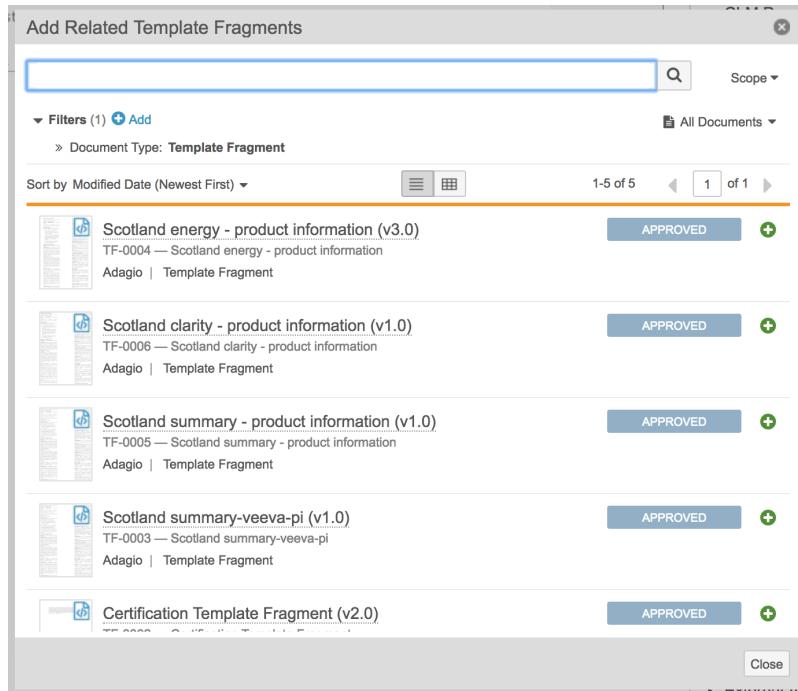
Please also refer to packaging assets folder under section related to **Email Templates**, if required. Same requirements should apply for **Template Fragments**.

The screenshot shows a software interface for managing product information. At the top, it says "Scotland energy - product information (v3.0) APPROVED". Below this is a toolbar with various icons. The main content area displays "PRESCRIBING INFORMATION" for ZYTIGA® 500mg film-coated tablets. It includes sections for ACTIVE INGREDIENT(S), INDICATION(S), and detailed medical information about hepatotoxicity and bone density. To the right, a "INFORMATION" panel is open, showing the "General" tab with details like Name (Scotland energy - product information), Title (Scotland energy - product information), Type (Template Fragment), Document Number (TF-0004), and Batch Number. It also shows the document was created by Frédéric Joiris on 14/05/2018 14:00 CEST, last modified by Frédéric Joiris on 14/05/2018 15:40 CEST, and has a version of 3.0. The Lifecycle is Approved Email, Status is Approved, and Country is United Kingdom. At the bottom of the information panel, there is a "File Info" link.

In order to work properly, **Template Fragments** must be attached to an **Email Template**, to do so, select your uploaded **Email Template** from the **Library**.



- Find the section titled **Related Template Fragments** in the right area of the document properties panel and click on the + icon.

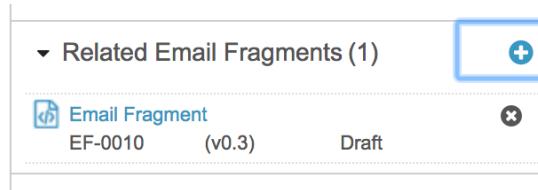


- By default, **Template Fragments** should be restricted by product (i.e. the list will display fragments that are of the same product as specified in the template). If you want to disable this, you need to **Edit the Email Template**, and change value of the radio field titled **Restrict Fragments by Product**.

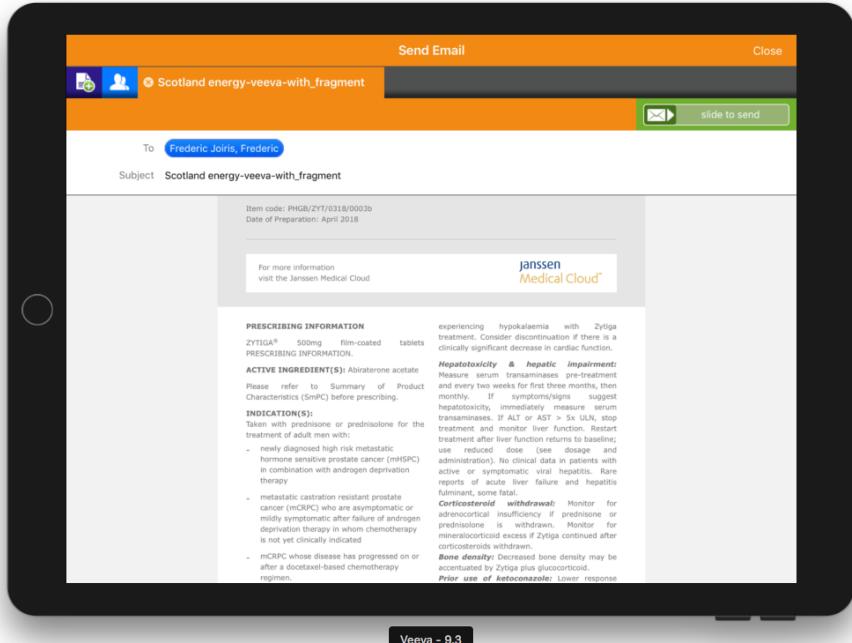


- You can add only 1 **Template Fragment** by clicking the + icon in the list.

Note that just like adding assets package, you don't need to save your template after adding fragments. This operation is saved automatically by Veeva.



Important: in order to work in Veeva CLM, all **templates**, subsequent **fragments** and **documents** (PDF) must be set to **approved stage**. The document will detail later on how to set documents to **approved** stage.



Veeva - 9.3

- When added to templates, **Template Fragments** will automatically be in the **Email Template** before Veeva sends the email to the HCP

Using Documents

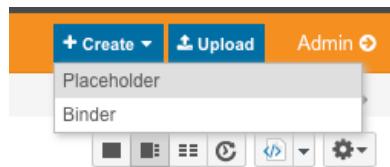
The last important document type is the **Reference Document**. In Veeva, you are not able to add documents as attachments. Instead, you will need to specify a **Document** which will be available as a link in an **Email Template**, **Email Fragment** or **Template Fragment**.

Linking to **Reference Documents** in the HTML file has a specific syntax, which will require identifying the **ID** of the **Document** you want to link to.

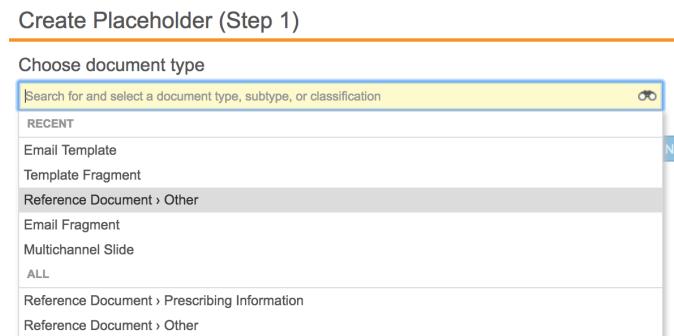
You can attach as many Reference Documents as needed to an Email Template / Fragment / Template Fragment, however you will need to find out each Document ID to use them within your container.

Creating Documents

Creating and importing Documents is easy and the exact same procedure as for **Email Templates**, **Email Fragments** and **Template Fragments**. You can therefore choose to import **Reference Documents** individually, or using batch upload. Example below refers to creation steps using individual import.



- Click **+ Create** on top of the page and select "**Placeholder**"



- Select **Reference Document > Other** from the list and click **Next**

You will notice that some sub-categories of Reference Documents are available. In this example, we will use Other as the sub-category.

Complete the required fields. You will notice the list of required fields is much shorter than for Email Templates. This is normal, since Reference Documents are not being sent or used on their own. They always depend on a parent Email Template, Email Fragment or Template Fragment.

- Name: document name. Check with your VEEVA administrator for the nomenclature.
- Country: select correct value from the list. Note that if you start typing the country name, Veeva will automatically suggest relevant results (auto-complete).
- Product: select correct value from the list. Note that if you start typing the name of the product, Veeva will automatically suggest relevant results (auto-complete).

- Click on Save
- Uploading the Document works exactly the same way as for the Email Template.
- You also get a preview of the Document when you edit or view it.

Unlike other **Documents** such as **Email Template**, **Email Fragment** and **Template Fragment**, you do not need to attach an assets ZIP file to the **Document**. Instead, the **Document** should contain all the information to work on its own. In most cases, **Documents** will be **PDF files**.

My STELARA App (v1.0) ★ APPROVED

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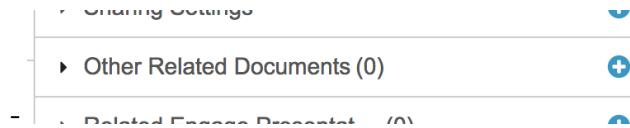
INFORMATION

General

Name: My STELARA App
Title:
Type: Reference Document
Subtype: Other
Document Number: REF-0002
Batch Number:
Created By: Frédéric Joiris on 03/05/2018 11:53 CEST
Last Modified By: Accounts Adagio on 03/05/2018 13:12 CEST
Version: 1.0
Lifecycle: Reference Documents
Status: Approved
Country: United Kingdom

File Info
Product Information
Sharing Settings
Reference Details
Supporting Documents (0)
Version History

In order to work properly, **Reference Documents** must be attached to an **Email Template**, **Email Fragment** or **Template Fragment**. To do so, select your uploaded **Email Template**, **Email Fragment** or **Template Fragment** from the **Library**.



- Find the section titled **Other Related Documents** in the right area of the document properties panel and click on the + icon.

Add Other Related Documents

Document	Status	Action
My STELARA App (v1.0) REF-0002 Adagio Reference Document > Other	APPROVED	+
clarity-fragment-1 (v2.0) EF-0011 — clarity-fragment-1 Adagio Email Fragment	APPROVED	+
clarity-1-veeva (v1.0) ET-0080 — clarity-1-veeva Adagio Email Template	APPROVED	+
adagio-template_BE-EN-0418-2 (v1.0) ET-0079 — adagio-template_BE-EN-0418-2 Adagio Email Template	APPROVED	+
adagio-template_BE-EN-0418 (v1.0) ET-0078 — adagio-template_BE-EN-0418 Adagio Email Template	APPROVED	+

Close

Sharing Settings

- Other Related Documents (1)

My STELARA App REF-0002 (v1.0) Approved	X
--	---

- You can add multiple **Reference Documents** by clicking the + icon in the list.

Note that just like adding assets package, you don't need to save your template after adding **Other Related Documents**. This operation is saved automatically by Veeva.

Important: in order to work in Veeva CLM, all **Templates**, subsequent **Fragments** and **Documents** (PDF) must be set to **approved stage**. The document will detail later on how to set documents to **approved stage**.

Create Links to your Reference Documents

In this section, we will identify the **Veeva Document ID** we want to link to and we will modify the HTML code in order to link to the correct **Document ID**.

To identify the **Document ID** you want to link to, open it in Veeva and identify the digits from the URL:

https://vv-agency-adagio.veevavault.com/ui/#doc_info/667/1/0=&idx=17&pt=al&tvsl=Jml2cD0xJml2dj1DT01QQNUUJnZpZXdJZD1hbGwmZmFjZXrZvW5jaGFuZ2VkPWZhbnUJml2cz1WZXJzaW9uTGFzdE1vZGlmaWVkRGFOZSZpdm89ZGVzYw,,

The **Document ID** can be found after the `/#doc_info/` parameter and must always contain digits. In this case, the **Document ID** is **667**.

Now, we need to edit the HTML code from the **Email Template**, **Email Fragment** or **Template Fragment** that will link towards the **Document**, and we will specify the **Document ID**. Below is a sample HTML snippet for the **Document** we just created.

Example:

```
<td align="left" bgcolor="#f2f0ec" valign="top" style="font-family: Arial, sans-serif; text-align:left; font-weight: bold; ">

<a href="{{$667}}" style="text-decoration: none; color: #ed842a; font-size: 16px;">

    <span style="font-size:18px; line-height:20px; text-transform: uppercase; color:#00693c;">Mode of Action Eloqua MAP</span><br />

    View Video

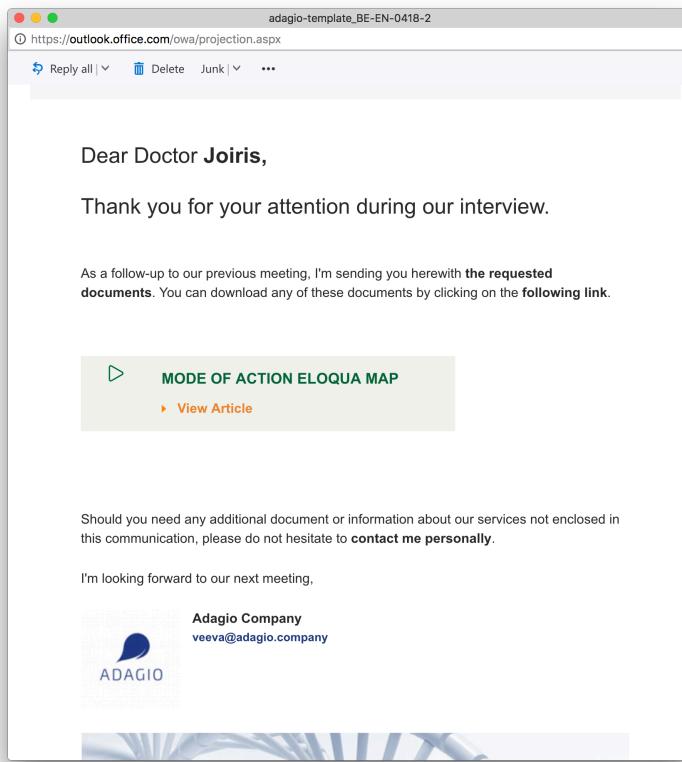
</a>

</td>
```

The syntax will always remain the same: `{{$document_id}}` where **document_id** needs to be replaced with the digits we identified in the previous step.

In addition, a `{{$document_id}}` should always be included with a link tag (``) in order to work properly, because Veeva generates a **unique URL** pointing towards the **Document**.

After having modified the HTML document and included the **Document ID**, you will need to re-upload it in Veeva to replace the previous version.



- When properly added and configured, the **Document** will open when the link is clicked in the sent email.
- **Note that the Document will be opened within Veeva environment and not as an attachment.**

MyStelara Wireframe Concept

1	Date: 6 April 2017 4:16 PM
2	Company: Janssen
3	Client Name: Erica McAuley-Clark, Hita Avakh
4	Product: My Stelara App
5	Wireframe version: 10
6	Objective: Update app's content to include content for plaque psoriasis. The first instance of STELARA to be uppercase and a registered symbol to appear in the first instance

This document shows the design and content of the app. The designs shown here are mockups only. The final application may have subtle visual differences, such as the way fonts are displayed.

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Testing Approved Emails with Veeva Vault

Since the renditions produced in Veeva Vault are not always reliable (Veeva generates its own HTML/PDF rendition of the template, using a specific engine), you are encouraged to test your templates after they were uploaded in Vault.

In order to properly test your email templates, you have 2 options. Ideally, each option should be tested individually:

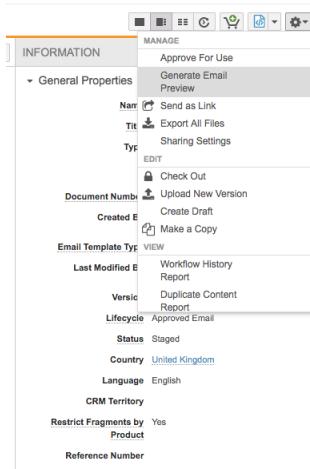
- Email Client testing (Litmus integration within Veeva)
- Email sending through Veeva Approved Email

Veeva Vault Integration with Litmus

Veeva sandbox has an interesting functionality to test all your **Email Templates** with Litmus. Litmus is a third-party platform that generates renders of an **Email Template** in various mail clients or devices.

To test a specific **Email Template**, you should first ensure it was uploaded correctly and assets were attached and uploaded as well.

Edit or view an **Email Template** and click on the settings menu icon in the top right corner of the document screen  and select "**Generate Email Preview**" from the menu.-



A screen containing preview thumbnails will display. Simply click on a thumbnail to show it on screen and view how the template would look like with the selected mail client / device.

[« Back to previous page](#)

Preview of clarity-1-veeva (v0.1)



Generating Preview 1 of 11 images

Desktop Clients



Outlook 2007



Outlook 2010



Apple Mail 9

Mobile Clients



iPhone X



iPhone 7



iPhone 7 Plus

Tablet Clients



iPad (Retina)

Test by Sending a Real Email

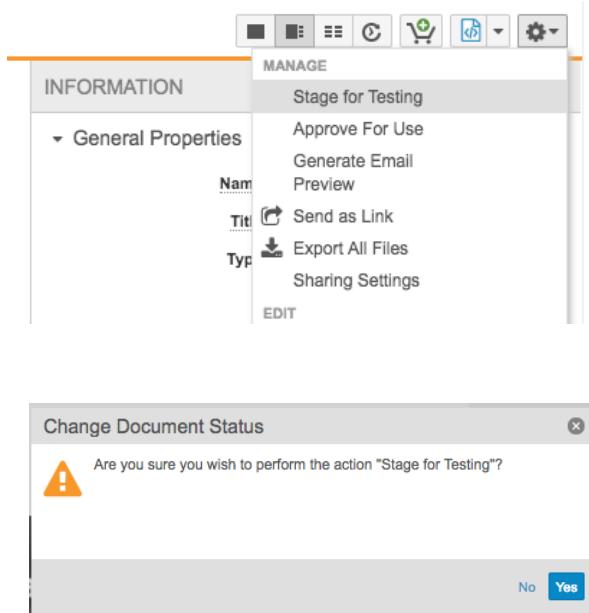
Ultimately, you can test a specific **Email Template** and send it to yourself. In order to do so, some steps are required.

You can send a test email to yourself before the Template is "**approved for use**" in Veeva Vault

If you want to be able to have this functionality available, you should place the template in a "**Stage for testing**" status

To do this, select your **Email Template** from the Library and select "**Stage for Testing**" from the menu icon  on the right and confirm.

In order to test **Email Fragments**, **Template Fragments** and **Documents**, subsequent attached documents should also be placed in a "**Stage for testing**" status.



iConnect setup

Test users should have the following setup in **iCONNECT**:

- Enable the "**Approved Email Admin**" checkbox on the user profile
- Assign the permission set "**jj_AE_FIELD_USER**" to the user

Make sure the test user has visibility on the associated product via **MySetup**

Once the administrative setup is finished, the "**staged for testing**" Email Template becomes visible for the test user

The synchronization can take up to 1 hour!

The screenshot shows a list of email templates. At the top, there's a search bar and a filter section with dropdowns for 'Common' (set to 'Trevicta (BE)'), 'Language' (set to 'All'), and a 'Search:' field. Below this is a table titled 'Email Templates (4)'. The columns are 'Approved Document Name', 'Product', 'Language', 'Status', and 'Description'. The data rows are:

Approved Document Name	Product	Language	Status	Description
Template Zytiga Test NL	Trevicta (BE)*	nl_NL	Approved	Template Zytiga Test NL
Test Vicky	Trevicta (BE)*	nl_NL	Staged	Test Vicky
veeva_html	Trevicta (BE)*	English	Approved	
Zytiga Demo FR	Trevicta (BE)*	nl_NL	Approved	Zytiga Demo FR

Send Test Email

The test user should select a random HCP (it doesn't matter which one, you can use a test account if you have one) and press the "**Send Email**" button

- In the overview of templates your test user will also see templates with status "**Staged**"
- Select that template and press the "**Add Selected**" button

In the mail that is generated, you will see that the email will be sent to the mail address of your test user (**and not to the mail address of your selected HCP**)

Press the "**Send Now**" button to ensure the test email is sent.

The screenshot shows the 'Send Email' dialog. At the top, it says 'Approved Email' and 'Send Email'. It lists a recipient: 'Alt Oussard, Safia' with the email 'vlens1@its.jnj.com'. A dropdown menu shows 'Test Vicky' is selected. Below this is a preview window with the following content:

Test Vicky

Approved Document Name	Product	Language	Status	Description
Template Zytiga Test NL	Trevicta (BE)*	nl_NL	Approved	Template Zytiga Test NL
Test Vicky	Trevicta (BE)*	nl_NL	Staged	Test Vicky
veeva_html	Trevicta (BE)*	English	Approved	
Zytiga Demo FR	Trevicta (BE)*	nl_NL	Approved	Zytiga Demo FR

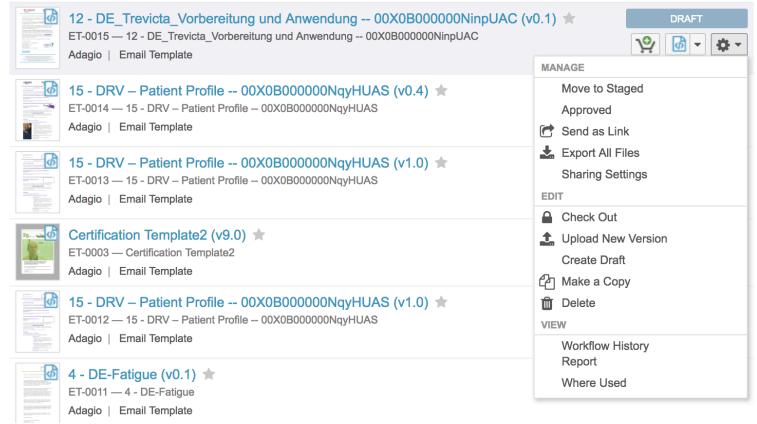
ALERT! All confirmed emails will be sent to (vlens1@its.jnj.com), and will not be sent to the Account email addresses.

Choose Test Email Address

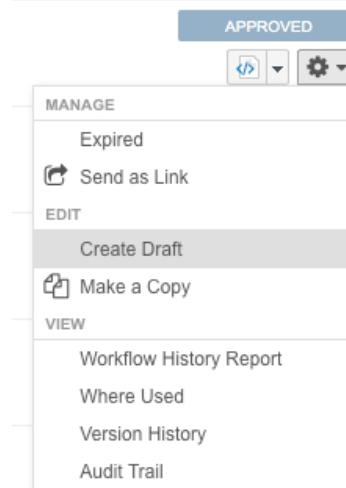
To: Alt Oussard, Safia<vlens1@its.jnj.com>
Subject: Test Vicky

Approving Documents

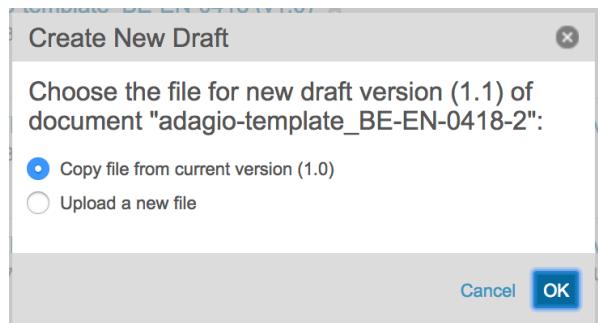
- For each document you create (template, fragment, promotional piece, etc.) , you will need to approve it for it to be made available in Veeva CLM.
- This can be done from the Documents List or on the Document itself. Click on the **Settings** icon and select **Approved** from the dropdown list.



- Confirm. The document will change to the **Approved** mode.
- To revert to **Draft**, select an **Approved** document or click on **Settings** and select **Create Draft**.



- You can choose to upload a new version of the **Document** you are reverting by selecting **Upload a new file** or make a draft copy of the current document.



- Don't forget to **Approve** the updated documents.

Note that unless documents are set to **Expired** state, any previously **Approved** document will remain available to the Reps. As such, reverting a document to **Draft** does not un-publish it. In addition, it is important to approve each and every subsequent document linked to an **Email Template**.

Once approved, documents will be synchronized with the CLM, however this synchronization process can take up to 1 hour.

Synching Approved Documents with Veeva CLM

Approved documents need to be synched up with Veeva CLM before they can be made available in VEEVA iPad Application.

Note that this operation needs to be performed by a Janssen Veeva Administrator or through a scheduler that runs every hour. Procedure shown below is for informative purpose only.

- Login with Veeva CLM
- Click on **Approved Email Administration** in the main menu. If you don't see the menu entry, click on the + icon and select **Approved Email Administration** from the list of **Salesforce Applications**.

The screenshot shows the Veeva CLM interface with the 'Approved Email Administration' tab selected in the top navigation bar. On the left, there is a sidebar with various buttons: 'Clear Veeva Cache', 'Create New...', 'Veeva CRM Help', 'iRep', 'Veeva CRM on Windows 8', and 'Recycle Bin'. The main content area is titled 'Approved Email Administration' and contains two sections: 'Refresh Administration' and 'Vault Statistics Management'. The 'Refresh Administration' section has a table with columns: User, Timestamp, Refresh Type, Status, Failed Rows, Successful Rows, and Message. The table lists several entries, mostly showing 'Success' or 'Successfully Processed' messages. The 'Vault Statistics Management' section has a table with columns: User, Timestamp, Status, Rows Processed, and Message. Both sections have a note at the bottom stating 'Only the last 10 records are displayed.'

User	Timestamp	Refresh Type	Status	Failed Rows	Successful Rows	Message
cloader@veeva.partner39.adagio	19/04/2018 10:56	Incremental	Finished	0	2	Successfully Processed 2 Approved Documents
cloader@veeva.partner39.adagio	19/04/2018 07:35	Incremental	Finished	0	81	Successfully Processed 61 Approved Documents
cloader@veeva.partner39.adagio	17/04/2018 13:32	Incremental	Finished	0	3	Successfully Processed 3 Approved Documents
cloader@veeva.partner39.adagio	17/04/2018 11:47	Incremental	Finished	0	0	Success
cloader@veeva.partner39.adagio	17/04/2018 11:46	Incremental	Finished	0	2	Successfully Processed 2 Approved Documents
cloader@veeva.partner39.adagio	17/04/2018 10:15	Incremental	Finished	0	1	Successfully Processed 1 Approved Documents
cloader@veeva.partner39.adagio	26/03/2018 14:53	Incremental	Finished	0	0	Success
cloader@veeva.partner39.adagio	22/03/2018 18:40	Incremental	Finished	0	2	Successfully Processed 2 Approved Documents
cloader@veeva.partner39.adagio	22/03/2018 18:26	Incremental	Finished	0	1	Successfully Processed 1 Approved Documents
cloader@veeva.partner39.adagio	8/03/2018 15:27	Incremental	Finished	0	2	Successfully Processed 2 Approved Documents

User	Timestamp	Status	Rows Processed	Message

- The list shows last connections to the VEEVA Vault and the type of synchronization.
- To force a full synchronization, click on **Force Full Refresh**. This will synchronize **all approved documents**.
- To incrementally sync the content, click on **Incremental Refresh**. This operation will only synchronize new and modified approved documents.
- **Rows Processed** indicates the number of documents that were imported
- If you want to know which documents have been synchronized, click on **Approved Documents** in the main menu (click on the + icon in the main menu to access the **Salesforce Application** if **Approved Documents** does not appear in the main menu).

Home Clear Veeva Cache Accounts Key Messages CLM Presentations CLM Presentation Slides Approved Email Administration Approved Documents

Search

Accounts Go!

Limit to items I own Advanced Search...

Clear Veeva Cache

Clear Veeva Cache

Create New...

Veeva CRM Help

Veeva CRM Documentation

iRep

iRep Install

Veeva CRM on Windows 8

Install Windows 8 application

Recycle Bin

Approved Documents Home Help for this Page

View: All Go! Edit | Create New View

Recent Approved Documents

New Recently Created

Approved Document Name
Email Fragment adagio-template_BE-EN-0418-2
8 - Where to use Imbruvica ▾ (ibrutinib) in the CLL treatment pathway -- 00X0B00
45 - Dr Green - What would it mean if you could give your Myeloma patients... --
31 - CD Meeting in a box _ thank you email (Sept 17 PI) -- 00X0B000000vgc9UAA
19 - PsO 121 Pre Absolute PASI (Sep-17 PI) -- 00X0B000000vfcAUAY
23 - CD 121 Rapid response (Sep-17 PI) -- 00X0B000000vHAUAY
39 - Janssen_ An enduring maintenance treatment for your patients... -- 00X1p000
47 - 8 hour infusion stability CD 1 1 email -- 00X1p000000FA09EA0
17 - Promotional information from Janssen Oncology - Energy Matters -- 00X0B0000
30 - (Professor Paul Richardson) Janssen virtual reality experience -- 00X0B0000
59 - Dr Green - What would it mean if you could give your Myeloma... -- 00X1p000
53 - Real-world Rezolox Reactivated -- 00X1p000000FAYIEAO
16 - 1 1 PsA MOA & efficacy persistency POST CALL (Sep-17 PI) -- 00X0B000000veiK
10 - PsO 121 Pre Safety (Sep-17 PI) -- 00X0B000000vfcZUAY
2 - (Dr Karthik Ramasamy) Janssen virtual reality experience -- 00X0B00000NpUBU
9 - New mode of action -- 00X0B000000vdhuUAA
12 - PsO 121 Pre MOA (Sep-17 PI) -- 00X0B000000vfcJUA
60 - Dr Blue - How could you improve survival rates in Multiple Myeloma -- 00X1
15 - 1 1 PsA MOA & efficacy persistency PRE CALL (Sep-17 PI) -- 00X0B000000vei5U
20 - PsO 121 Post Absolute PASI (Sep-17 PI) -- 00X0B000000vfcKUAY
4 - CD 121 Durable remission (Sep-17 PI) -- 00X0B000000vfiDUAY
1 - SYM AMBER EMERALD 48w 1/1 Follow-up -- 00X0B000000vhMbUAI
43 - Post ASH MCL Nice Approval -- 00X1p000000FA6yEAG
37 - Promotional information from Janssen Oncology - Independence Matters -- 00X

Appendix A – Account-based Veeva Tags (HCP)

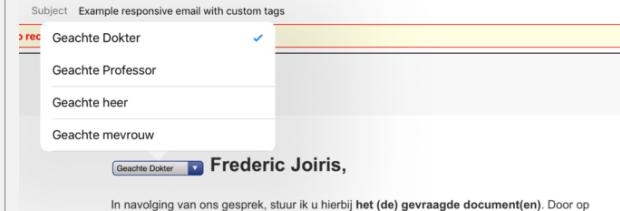
Account field	iConnect merge field	Veeva Approved Email	Output
Last Name	{!Account.LastName}	{{accLname}}	John
First Name	{!Account.FirstName}	{{accFname}}	Doe
First Name Last Name	{!Account.Name}	{{Account.Name}}	John Doe
Title	{!Account.PersonTitle}	{{accTitle}}	Dr.
Salutation	{!Account.Salutation}	{{Account.Salutation}}	Mrs.
Specialty 1	{!Account.Specialty_1_JJ__c}	{{Account.Specialty_1_JJ__c}}	General Medicine
Specialty 2	{!Account.Specialty_2_JJ__c}	{{Account.Specialty_2_JJ__c}}	Oncology
Email	{!Account.PersonEmail}	{{Account.PersonEmail}}	John.doe@mail.com
Alternate email	{!Account.Email_JJ__c}	{{Account.Email_JJ__c}}	John.doe@mail.com
Phone number	{!Account.JJ_Phone_1__c}	{{Account.JJ_Phone_1__c}}	+44 00000000

Appendix B – User-based Veeva Tags (Rep)

User field	iConnect merge field	Veeva Approved Email	Example
Last Name	{!User.LastName}	{{User.LastName}}	John
First Name	{!User.FirstName}	{{User.FirstName}}	Doe
First Name Last Name	{!User.Name}	{{userName}}	John Doe
Title	{!User.Title}	{{User.Title}}	Brand Manager XXX
Salutation	{!User.Salutation}	{{User.Salutation}}	Mrs.
Email	{!User.Email}	{{userEmailAddress}}	John.doe@its.jnj.com
Mobile	{!User.MobilePhone}	{{User.MobilePhone}}	+44 00000000
Phone number	{!User.Phone}	{{User.Phone}}	+44 00000000
Fax number	{!User.Fax}	{{User.Fax}}	+44 00000000
Photo²	N/A	{{userPhoto}}	

² With Veeva Approved Email, you can personalize the template and specify a picture to show wherever you need in the template. However, this requires upfront setup of the Veeva environment, as well as steps in the Veeva CLM application. Please contact your Veeva Administrator to know how to use {{userPhoto}} tag within templates.

Appendix C – Veeva Customization Tags (Rep)

Veeva field	Veeva Approved Email	Example
Custom Text with multiple choice (select)	<code>{{customText[Option 1 Option 2 Option X]}}</code>	<p>This field generates a Select field box in the Veeva CLM application. Note that the select field will always default to Option 1, if no other option is selected by the Rep.</p> 
Custom Text with free-text field	<code>{{customText(field_length defaultFallback)}}</code> Example: {{customText(100 Thank you for your attention during my visit.)}}	<p>This field generates a Free-text field box in the Veeva CLM application.</p> <p>Note that the field will also default to the specified fallback automatically. Also, note that the field box will have a default size, unless its width is set using CSS styles.</p> <p>Example of default size:</p>  <p>Example of size with CSS styling:</p>  <p>To achieve this, the agency creating the template should add a</p>

		<p>specific rule in the CSS part of the template, i.e.:</p> <pre>input[type=text] { width: 100%; }</pre> <p>This rule will ensure the free-text field takes 100% of width space it is contained in.</p>
Custom Rich-Text Field	<code>{{customRichText}}</code>	<p>Generates a Custom Rich Text field. This token does not take any parameter.</p> 
Unsubscribe link	<code>{{unsubscribe_product_link}}</code>	Generates an unsubscribe link.
Call Date/Time	<code>{{Call2_vod__c.Call_Datetime_vod__c}}</code>	Generates a date/time output of a specific call (Veeva Engage).
Template Fragment	<code>{{emailTemplateFragment}}</code>	Veeva placeholder for Master Template Fragments (i.e. footer).
Email Fragment	<code>{{insertEmailFragments}}</code>	Veeva placeholder for Email Template Fragments.
Trackable action	<code>{{approvedEmailAction[URL,RequestResource]}}</code>	Generates a trackable link to an external resource.
Footnotes	<code>{{InsertFootnotes}}</code>	Veeva placeholder for Email Template footnotes.
Citations	<code>{{InsertCitations}}</code>	Veeva placeholder for Email Template citations.

Piece link	<code>{{PieceLink}}</code>	Veeva placeholder for a promotional document.
Document link	<code>\$vault_document_id}</code>	Veeva placeholder for a Veeva specific document. <i>vault_document_id</i> can be identified in the URL part of the document, next to <code>/#doc_info/<vault_document_id></code>