Creating Users & Profiles in CRM & Vault

December 2015

Overview

- **This document covers the following:**
  - How to create a new user in CRM
  - How to create a new profile in CRM
  - How to create a new user in Vault

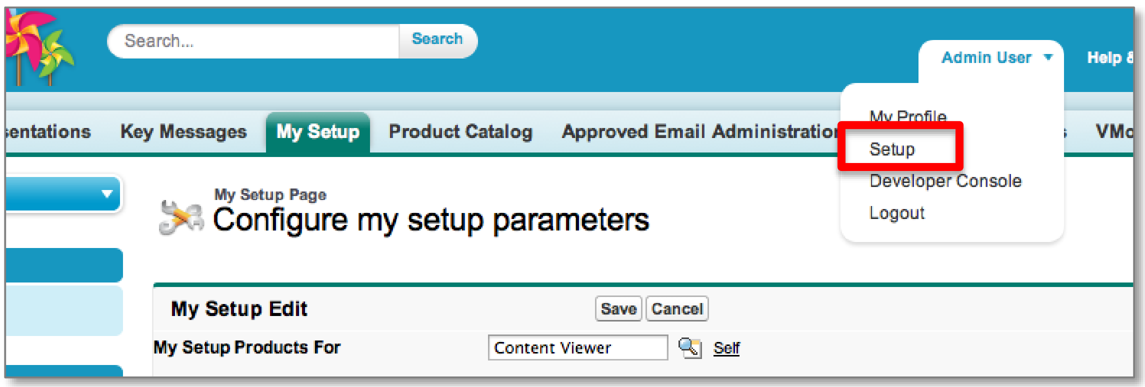
How to Create a New User in CRM

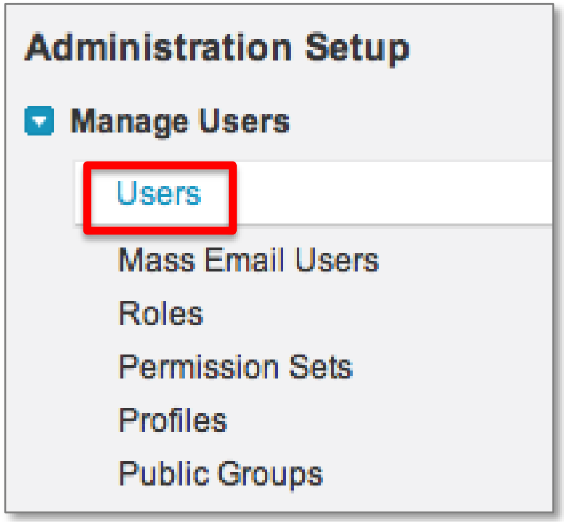
User Accounts

- **In Salesforce, every user is identified by a username, password, a single profile and a single role which determines:**
  - What tasks the users can perform
  - What data the users can see
  - What users can do with the data
- **Each partner sandbox comes with 29 users**
  - 4 of which can be System Administrator licenses

Creating a New User in CRM

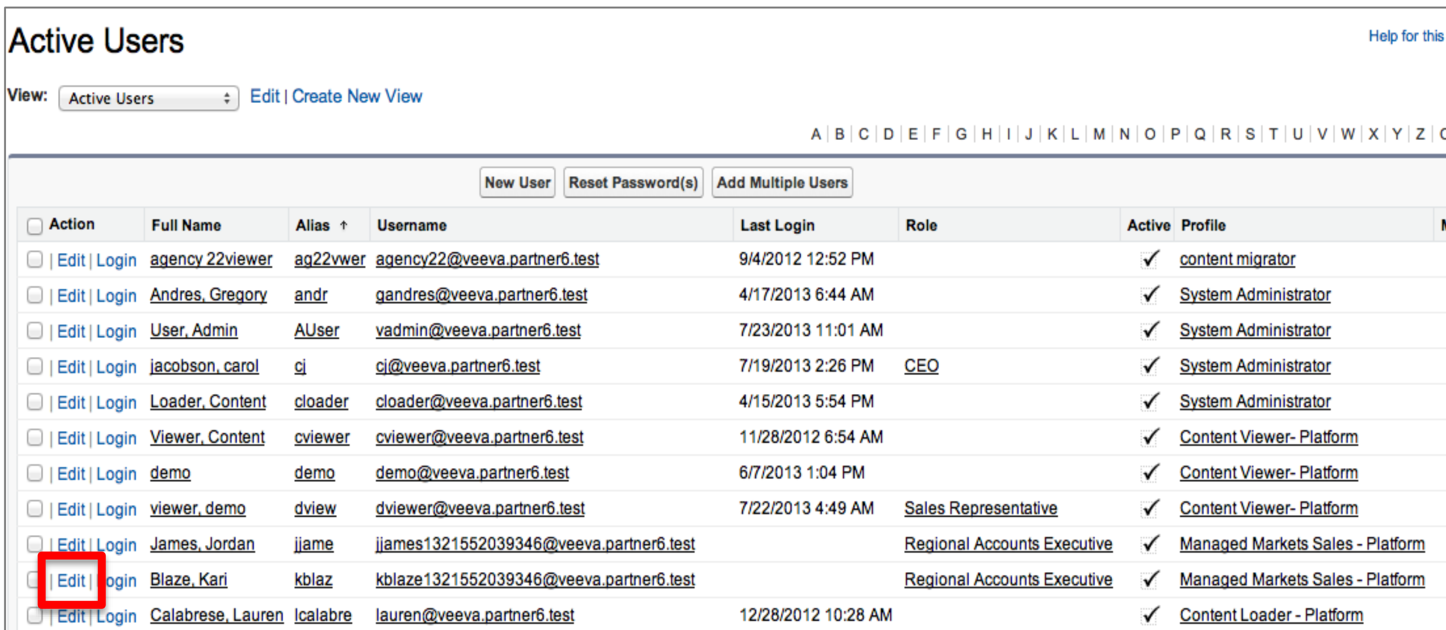
- **Navigate to the Setup Screen**
  - Then navigate to Administration Setup>Manage Users>Users





Creating a New User in CRM

- **Users cannot be deleted, only recycled, so start with an existing user that is not currently in use. There are many dummy users that come with your sandbox from which to choose**
- **In the example we are going to use, we are going to update the user "Kari Blaze," so we will select "Edit" next to her name.**



Active Users

Help for this P

View: Active Users Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Ot

New User | Reset Password(s) | Add Multiple Users

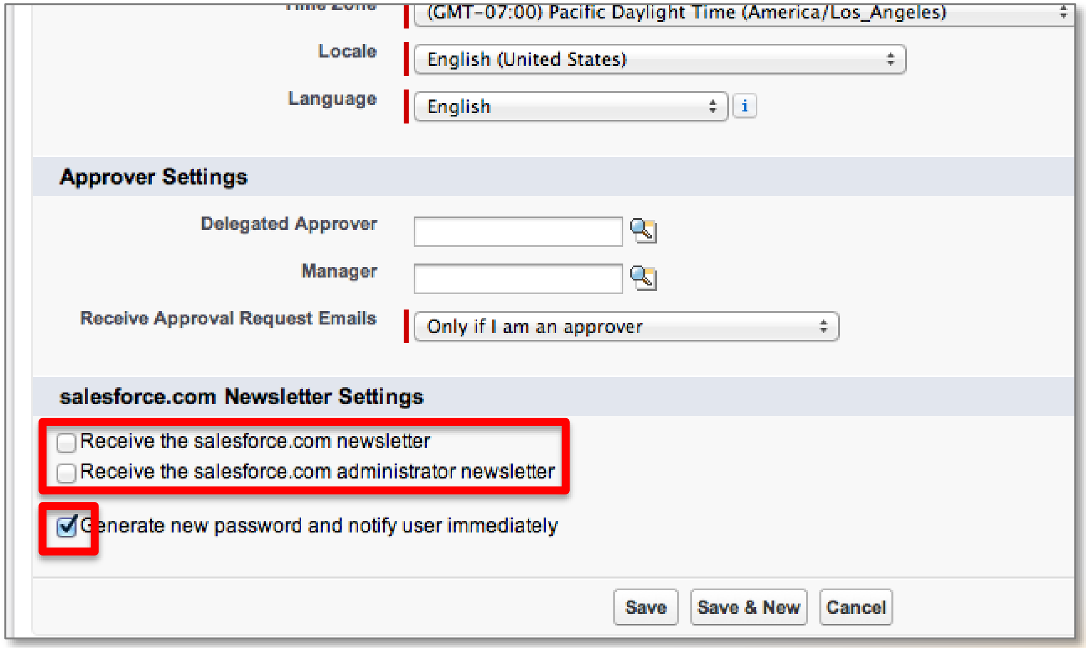
Action	Full Name	Alias ↑	Username	Last Login	Role	Active	Profile	Ma
Edit | Login	agency 22viewer	ag22vwer	agency22@veeva.partner6.test	9/4/2012 12:52 PM		✓	content migrator	
Edit | Login	Andres, Gregory	andr	gandres@veeva.partner6.test	4/17/2013 6:44 AM		✓	System Administrator	
Edit | Login	User, Admin	AUser	vadmin@veeva.partner6.test	7/23/2013 11:01 AM		✓	System Administrator	
Edit | Login	jacobson, carol	cj	cj@veeva.partner6.test	7/19/2013 2:26 PM	CEO	✓	System Administrator	
Edit | Login	Loader, Content	cloader	cloader@veeva.partner6.test	4/15/2013 5:54 PM		✓	System Administrator	
Edit | Login	Viewer, Content	cviewer	cviewer@veeva.partner6.test	11/28/2012 6:54 AM		✓	Content Viewer- Platform	
Edit | Login	demo	demo	demo@veeva.partner6.test	6/7/2013 1:04 PM		✓	Content Viewer- Platform	
Edit | Login	viewer, demo	dview	dviewer@veeva.partner6.test	7/22/2013 4:49 AM	Sales Representative	✓	Content Viewer- Platform	
Edit | Login	James, Jordan	jjame	jjames1321552039346@veeva.partner6.test		Regional Accounts Executive	✓	Managed Markets Sales - Platform	
Edit | Login	Blaze, Kari	kblaz	kblaze1321552039346@veeva.partner6.test		Regional Accounts Executive	✓	Managed Markets Sales - Platform	
Edit | Login	Calabrese, Lauren	lcalabre	lauren@veeva.partner6.test	12/28/2012 10:28 AM		✓	Content Loader - Platform	

Creating a New User in CRM

- **From here, we are going to adjust a few fields but leave most of the page as it is:**
  - First Name: Optional
  - Last Name: Your choice
  - Alias: Your choice
  - Email: Working email address of user
  - Username: Best practice is to use the firstname.lastname@ the naming convention used for the Content Loader that we provided to your team
  - Nickname: Your choice
  - Role: Select <none specified>
  - User License: Select “Salesforce Platform”
  - Profile: Your choice based on permission needs of the user
  - Active: Check box

Creating a New User in CRM

- **Then, scroll down the page and make sure the boxes under "Newsletter Settings" are unchecked**
- **Finally, select the box to generate a new password**
  - The email will go to the email address associated with this user
  - Click the hyperlink in the email to set the new password for your user



Creating a New User in CRM

- **You can now navigate to test.salesforce.com and begin to utilize your new user.**
- **Reach out to your Program Manager for any additional assistance**

How to Create a New Profile in CRM

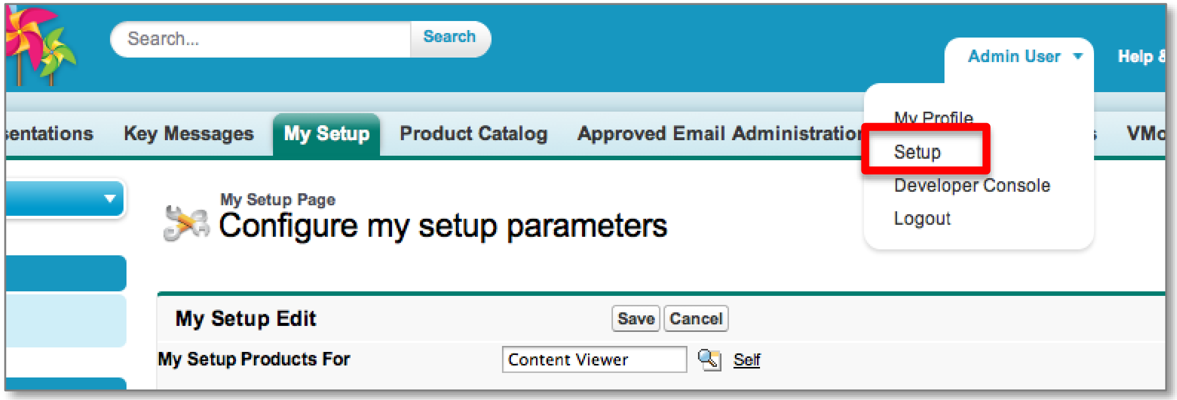
What is a Profile?

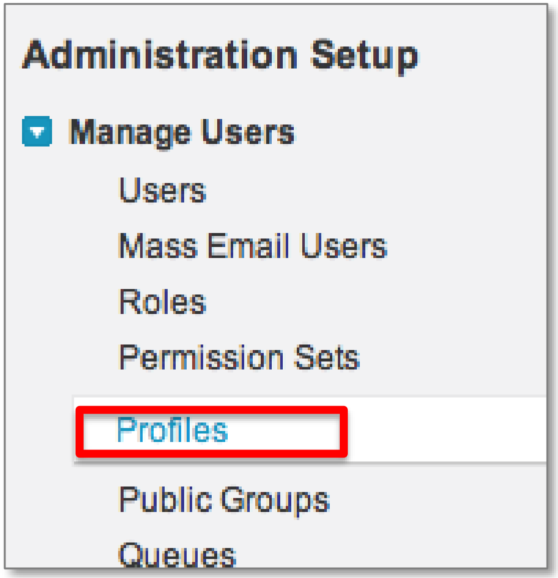
- **A profile determines what a user can and cannot do in the application based on their job function (typically)**
  - One profile can be assigned to many users but a user can be assigned to only one profile at a time
  - Important to set up user profiles properly in the beginning
  - Minimize the number of profiles used

System Administrator	• Configures and administers the Veeva application
Content Creator	• Administers CLM content in Veeva
Content Reviewer	• Reviews and approves CLM content in Veeva (e.g., Marketing or Legal)
Sales Representative	• Sales team member who views (but cannot edit) CLM content
Regional Manager	• Sales team manager who views (but cannot edit) CLM content

Creating a New Profile in CRM

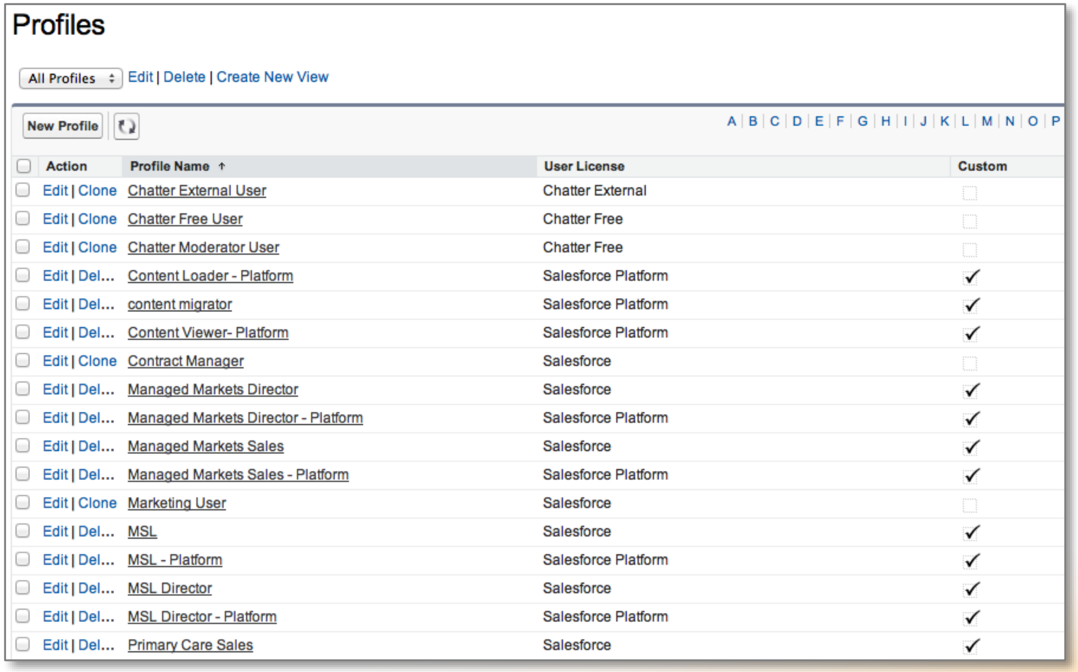
- **Navigate to the Setup Screen from the dropdown along the top**
  - Then, navigate to Administration Setup> Manage Users> Profiles





Creating a New Profile in CRM

- **From here, you are able to:**
  - Create a new profile (prompts you to clone from an existing profile)
  - Update an existing profile
  - Clone an existing profile and rename it for extra clarity
  - Delete unused profiles



Profiles

All Profiles | Edit | Delete | Create New View

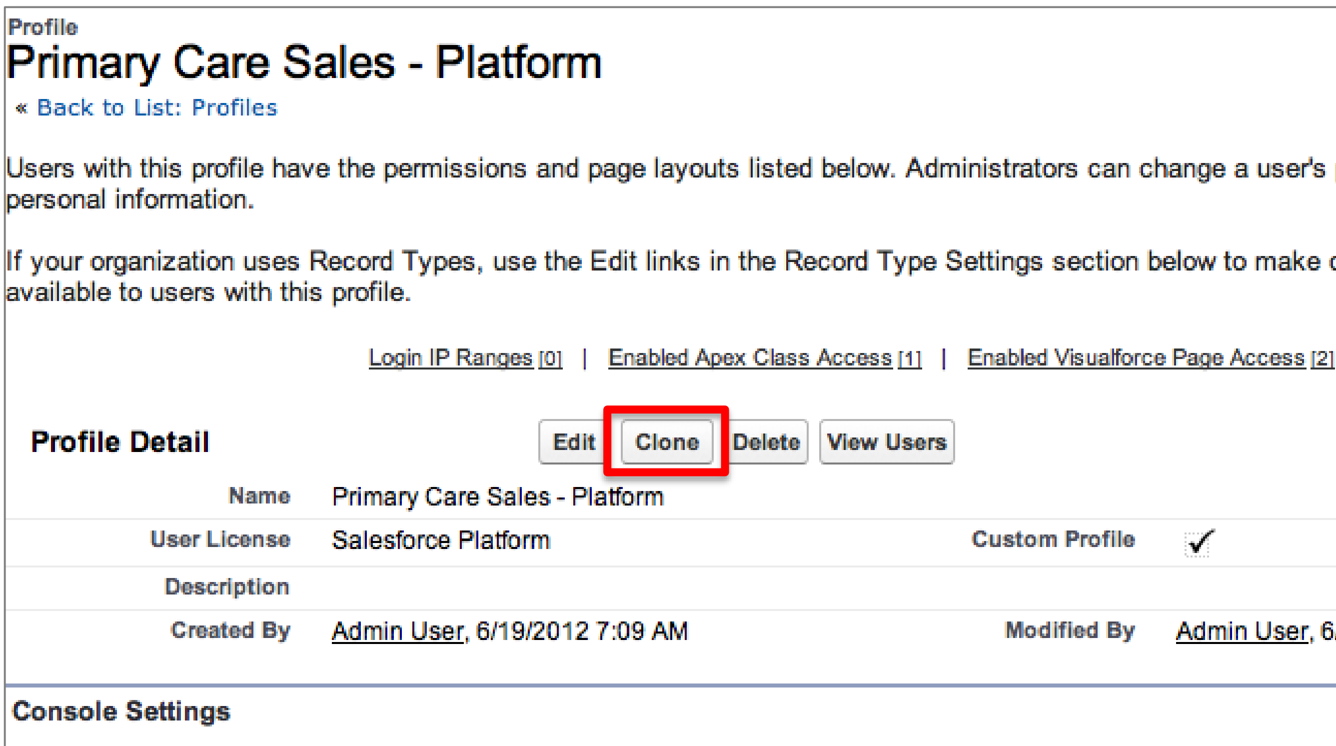
New Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P

Action	Profile Name ↑	User License	Custom
Edit | Clone	Chatter External User	Chatter External	
Edit | Clone	Chatter Free User	Chatter Free	
Edit | Clone	Chatter Moderator User	Chatter Free	
Edit | Del...	Content Loader - Platform	Salesforce Platform	✓
Edit | Del...	content migrator	Salesforce Platform	✓
Edit | Del...	Content Viewer- Platform	Salesforce Platform	✓
Edit | Clone	Contract Manager	Salesforce	
Edit | Del...	Managed Markets Director	Salesforce	✓
Edit | Del...	Managed Markets Director - Platform	Salesforce Platform	✓
Edit | Del...	Managed Markets Sales	Salesforce	✓
Edit | Del...	Managed Markets Sales - Platform	Salesforce Platform	✓
Edit | Clone	Marketing User	Salesforce	
Edit | Del...	MSL	Salesforce	✓
Edit | Del...	MSL - Platform	Salesforce Platform	✓
Edit | Del...	MSL Director	Salesforce	✓
Edit | Del...	MSL Director - Platform	Salesforce Platform	✓
Edit | Del...	Primary Care Sales	Salesforce	✓

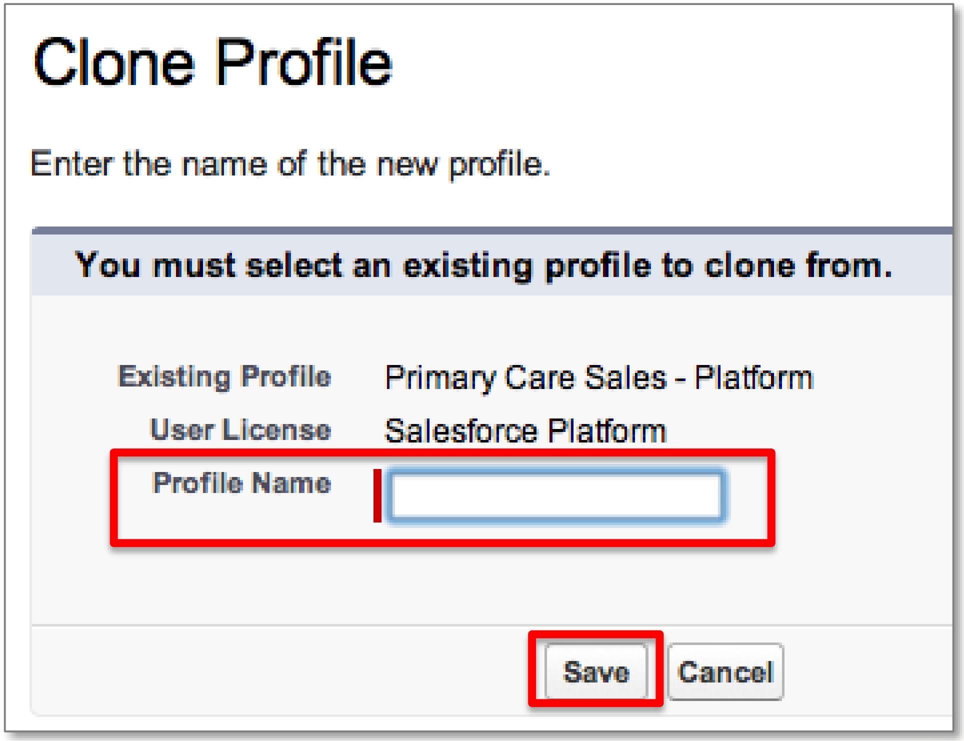
Creating a New Profile in CRM

- **For agencies creating CLM content, the best practice is to Clone the “Content Viewer - Platform” profile to use as a base profile**
- **Select that hyperlink and then click “Clone”**



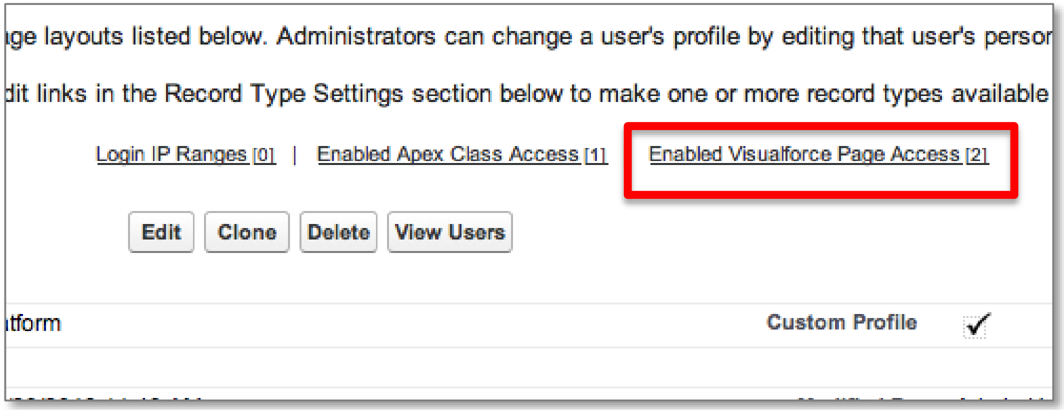
Creating a New Profile in CRM

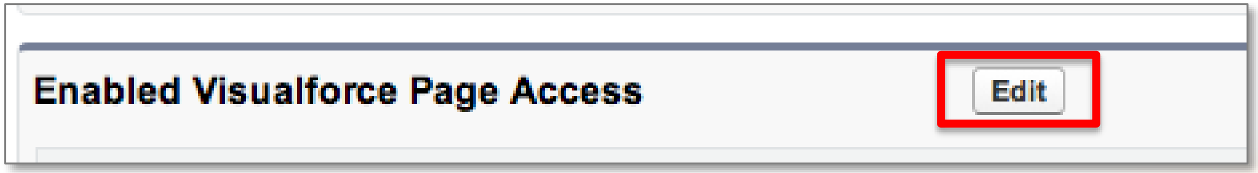
- **Enter a unique and identifiable name for your new profile**
- **Select "Save" to create the new profile**



Creating a New Profile in CRM

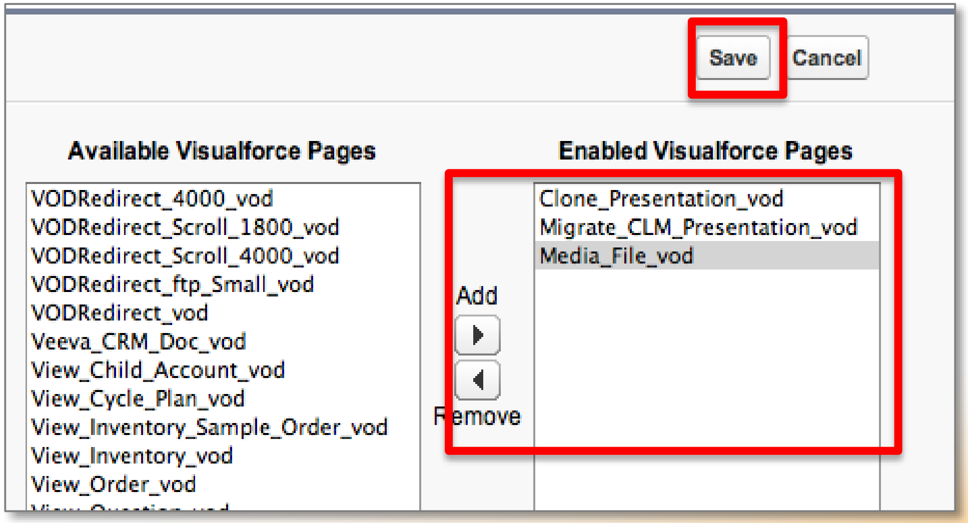
- **There are only a few areas of this page that agencies typically need to update**
- **Starting at the top, select the "Enabled Visualforce Page Access"**
  - Then, click "Edit" for that particular section





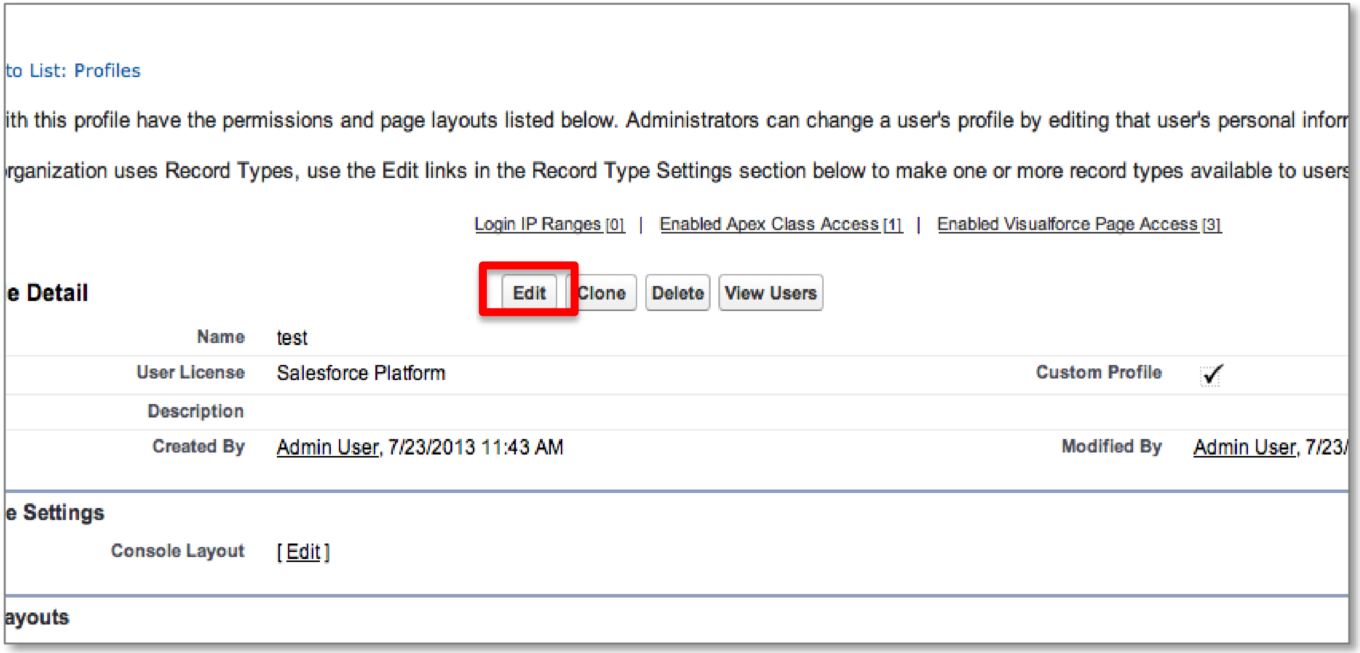
Creating a New Profile in CRM

- **If the profile will need to give users the ability to complete one or more of the following tasks:**
  - Clone
  - Migrate
  - Upload content
- **Select the corresponding Visualforce pages from the left column and add them to the right column as needed**
- **Then select "Save"**



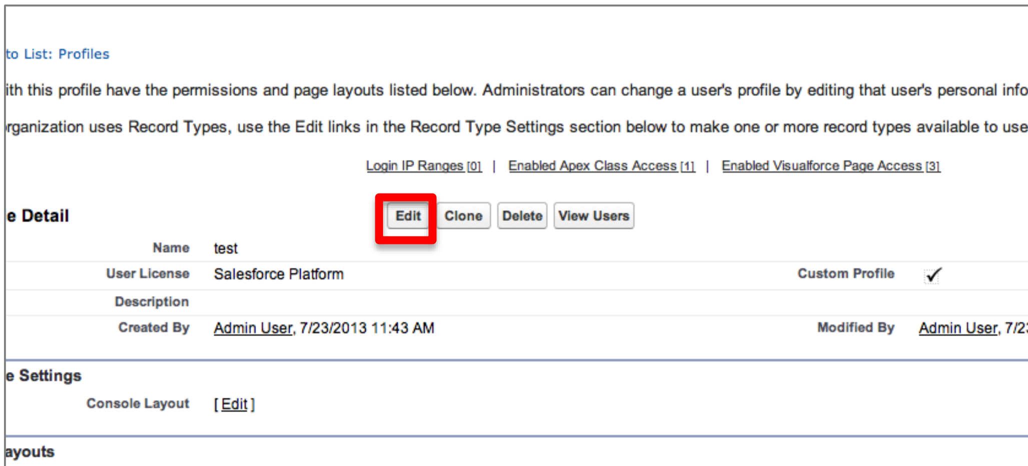
Creating a New Profile in CRM

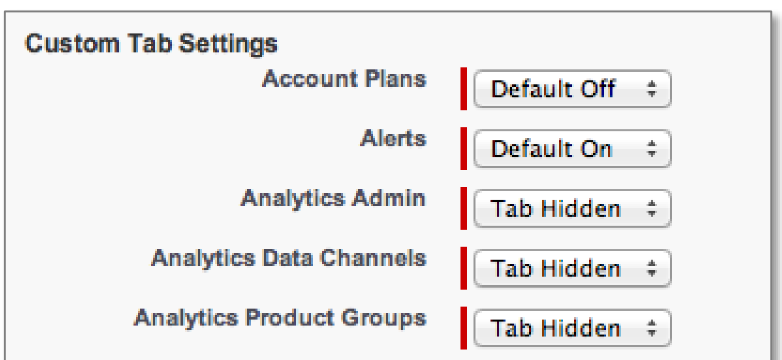
- **Return to the landing page for your new profile**
  - Select “Edit”

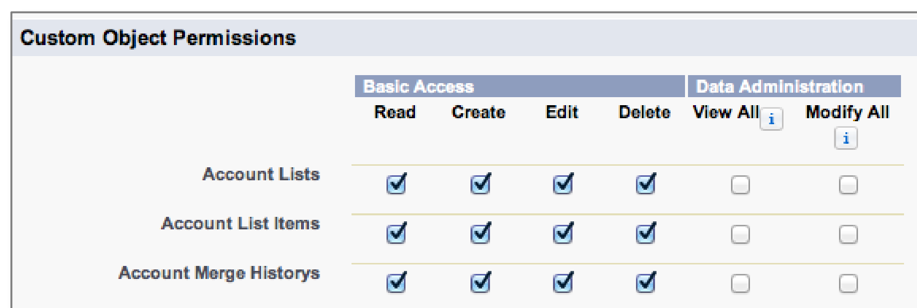


Creating a New Profile in CRM

- **From here, focus on which Tabs you want to make available for the user and also determine what type of object permissions are allowed.**







Creating a New Profile in CRM

- **The following Tabs need to be “Default On” for most agency profiles:**
  - Clear Veeva Cache
  - CLM Presentations
  - CLM Presentation Slides
  - Key Messages
  - My Setup
  - Product Catalog
- **The following Custom Objects need to be at least “Read” (if not full permissions) for most agency profiles based on need:**
  - Call Clickstreams
  - CLM Presentation
  - CLM Presentation Slides
  - Key Messages

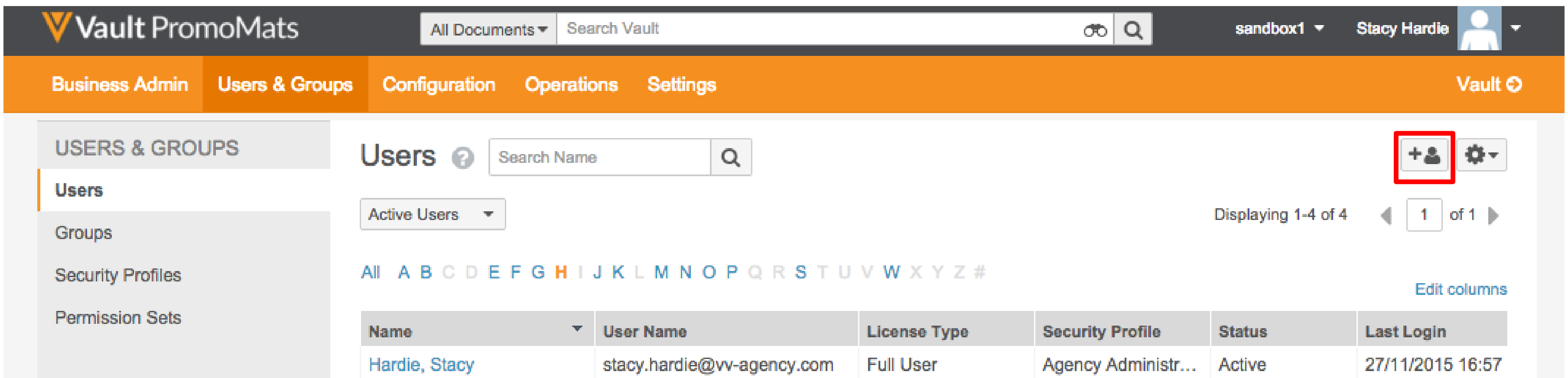
Creating a New Profile in CRM

- **To utilize your new profile, follow the steps outlined to create and update users and choose your profile from the dropdown menu.**
- **Reach out to your Program Manager for any additional assistance**

How to Create a New User in Vault

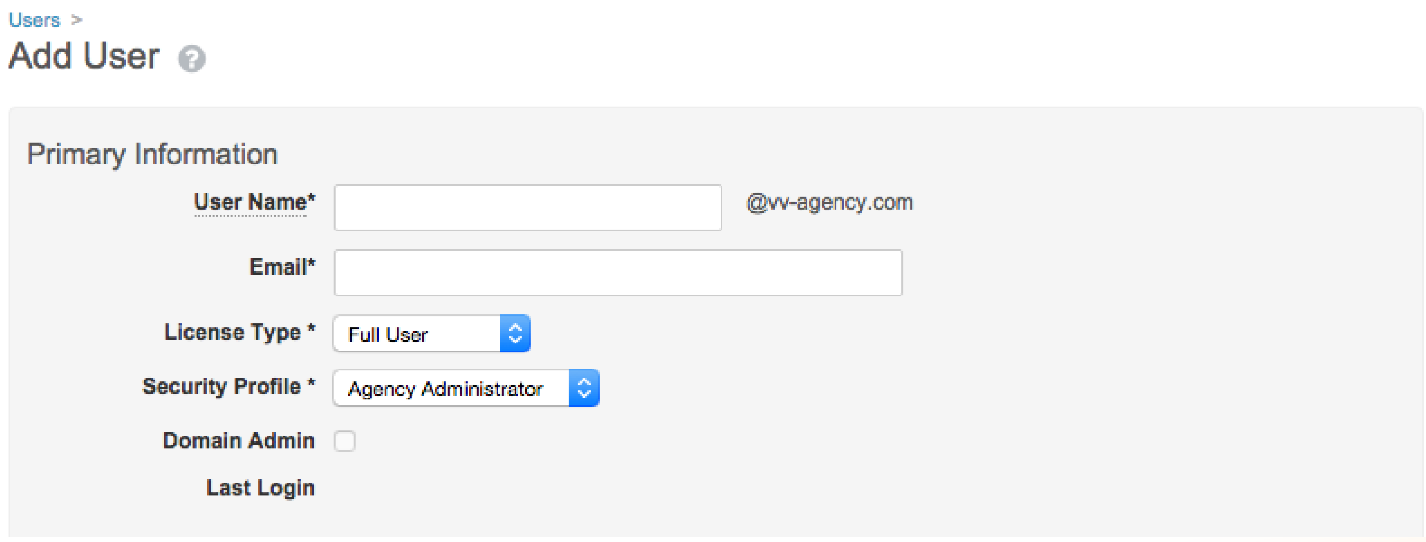
Creating a New User in Vault

- **A user's default access is determined by:**
  - User License
  - Security Profile
  - Permission Sets
- **Go to Admin> Users & Groups> Create User Icon**



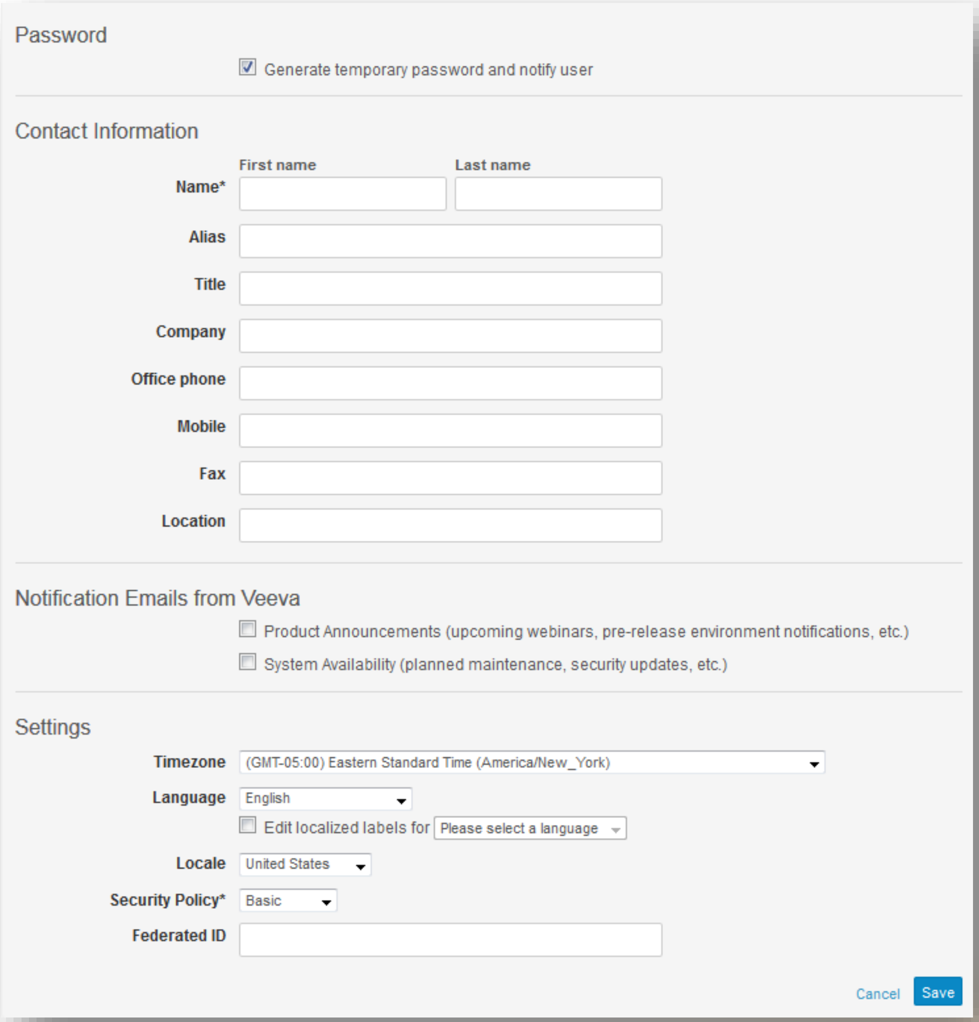
Creating a New User in Vault

- **Primary Information**
  - Enter unique username & email
  - Select User Type
  - If the user creating the user has an Agency Administrator profile, they can designate this user as an Agency Administrator



Creating a New User in Vault

- **Password**
  - Select the checkbox to have a password generated and the user notified
- **Settings**
  - Timezone
  - Language
  - Locale
  - Security Policy



Creating a New User in Vault

- **Once created, new users will receive an email from Vault to set their password**

Welcome to Veeva Vault! Your user name and temporary password are given below:

User Name: **anna.jones@vv-agency.com**
Password: **xRO2DKaA67w98Cg**

Click here to change your password

If you experience problems with the above link, please contact your administrator for assistance.

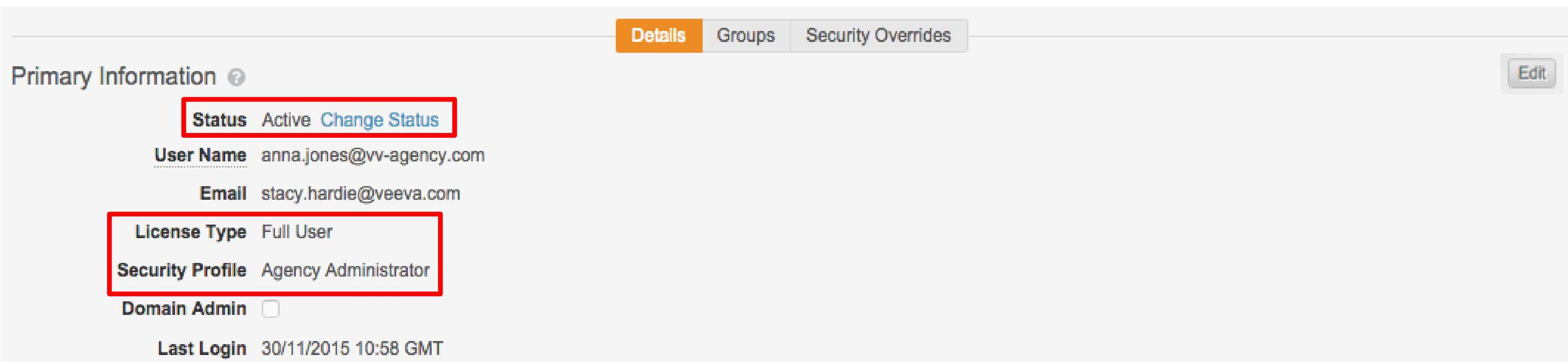
You'll be asked to change your password when you first log in. Note that passwords are case-sensitive. Make sure that you choose a password that you can remember, but complex enough not to be guessed by others. If you experience problems, contact your system administrator to reset the password.

Once you have changed your password you can access Vault here.

Once again, welcome to Veeva Vault!

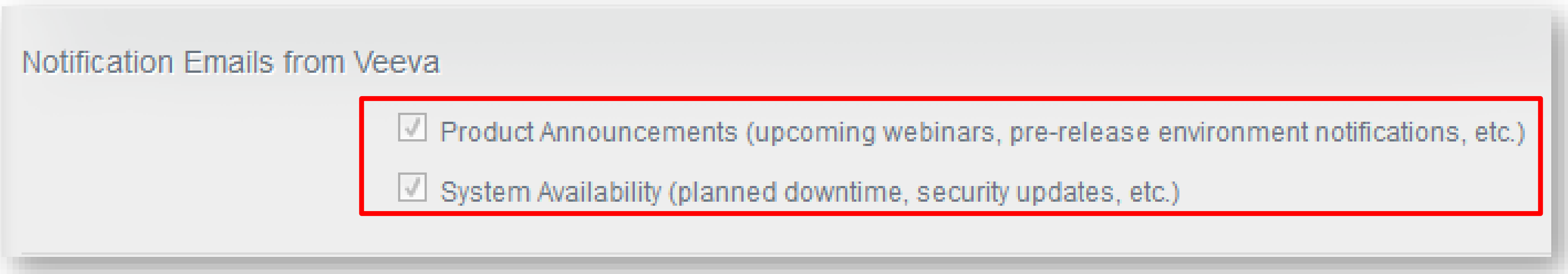
Creating a New User in Vault

- System Admins, Agency Administrators, Vault Owners, and Domain Admins can set or change User Type and Security Profile for each user
- Vault does not allow user accounts to be deleted, instead use the Change Status link set them to inactive



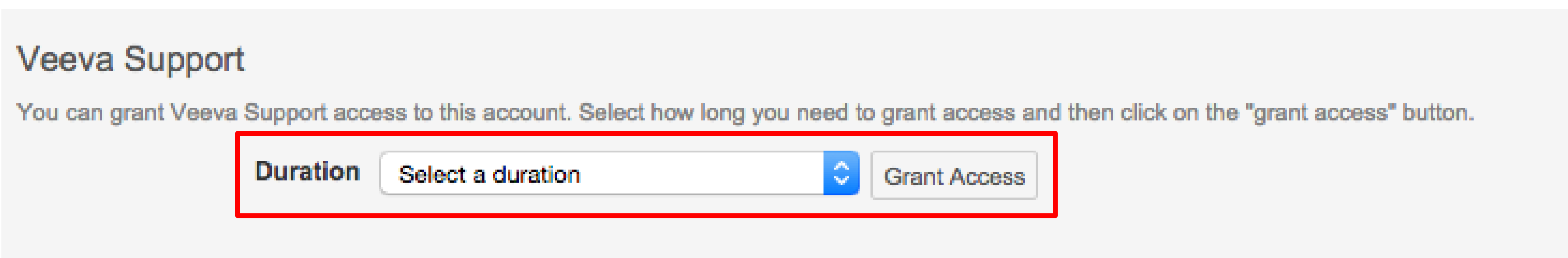
Creating a New User in Vault

- **Users can elect to receive Veeva notifications including product announcements and system availability communications**



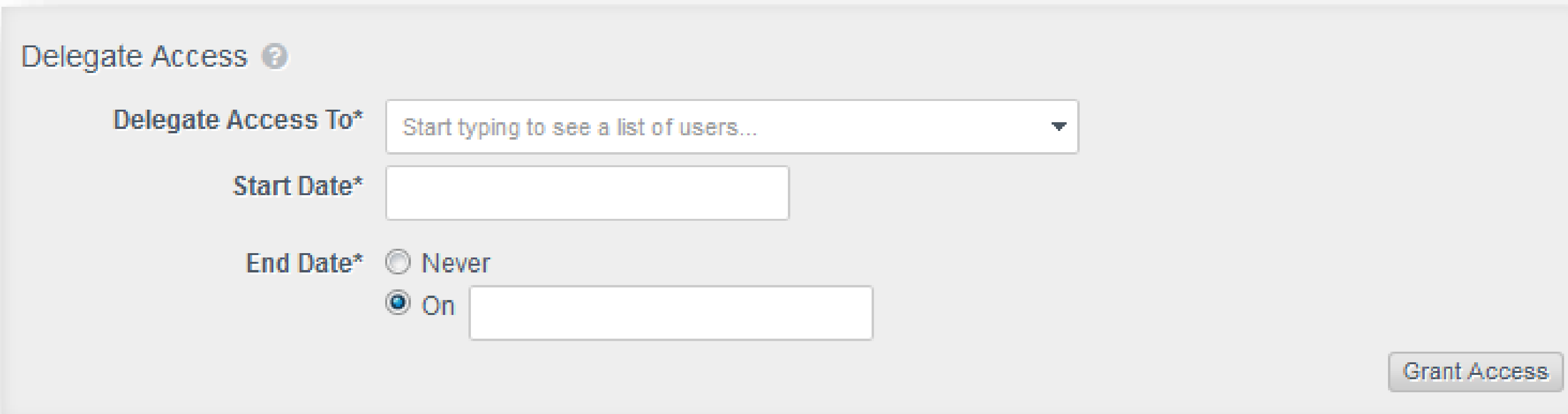
Granting Veeva Support Access

- **When you need assistance from Veeva Vault Support, it can be useful for them to see your Vault from your users' perspective**
  - Allows a System Admin, Agency Administrator, Vault Owner, or Domain Admin to grant access to Veeva Support to a Vault user for a set period of time (4 hours, 1, day, 2 days, 7 days, and 30 days)
  - Please include your Vault ID in your support ticket. This can be found in Admin> Settings> General Settings



Delegate User Access

- **Delegate Access gives a User to provide another User with their access permissions and receive their workflow tasks**



Thank You