



# 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

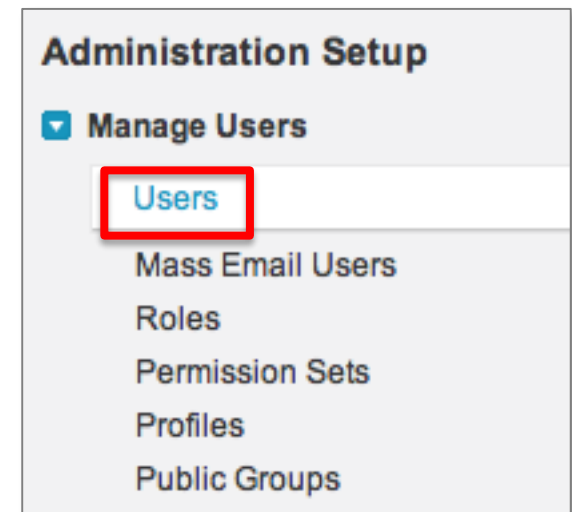
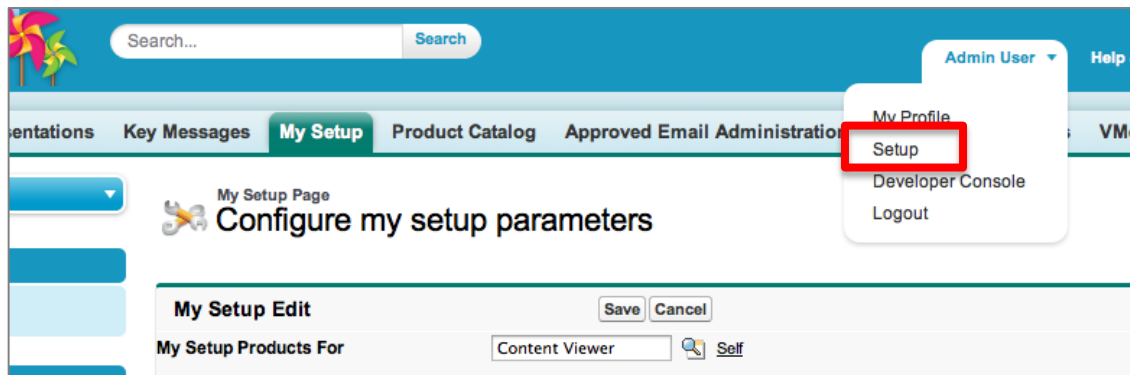
- **In Salesforce, every user is identified by a username, password, a single profile and a single role which determines:**
  - What tasks the users can perform
  - What data the users can see
  - What users can do with the data
- **Each partner sandbox comes with 29 users**
  - 4 of which can be System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

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 Other

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name	Alias ↑	Username	Last Login	Role	Active	Profile	Ma
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	agency 22viewer	ag22vwvr	agency22@veeva.partner6.test	9/4/2012 12:52 PM		✓	content migrator	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Andres, Gregory	andr	gandres@veeva.partner6.test	4/17/2013 6:44 AM		✓	System Administrator	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	User, Admin	AUser	vadmin@veeva.partner6.test	7/23/2013 11:01 AM		✓	System Administrator	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	jacobson, carol	cj	cj@veeva.partner6.test	7/19/2013 2:26 PM	CEO	✓	System Administrator	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Loader, Content	cloader	cloader@veeva.partner6.test	4/15/2013 5:54 PM		✓	System Administrator	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Viewer, Content	cviewer	cviewer@veeva.partner6.test	11/28/2012 6:54 AM		✓	Content Viewer- Platform	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	demo	demo	demo@veeva.partner6.test	6/7/2013 1:04 PM		✓	Content Viewer- Platform	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	viewer, demo	dview	dviewer@veeva.partner6.test	7/22/2013 4:49 AM	Sales Representative	✓	Content Viewer- Platform	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	James, Jordan	jjame	jjames1321552039346@veeva.partner6.test		Regional Accounts Executive	✓	Managed Markets Sales - Platform	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Blaze, Kari	kblaz	kblaze1321552039346@veeva.partner6.test		Regional Accounts Executive	✓	Managed Markets Sales - Platform	
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Calabrese, Lauren	lcalabre	lauren@veeva.partner6.test	12/28/2012 10:28 AM		✓	Content Loader - Platform	



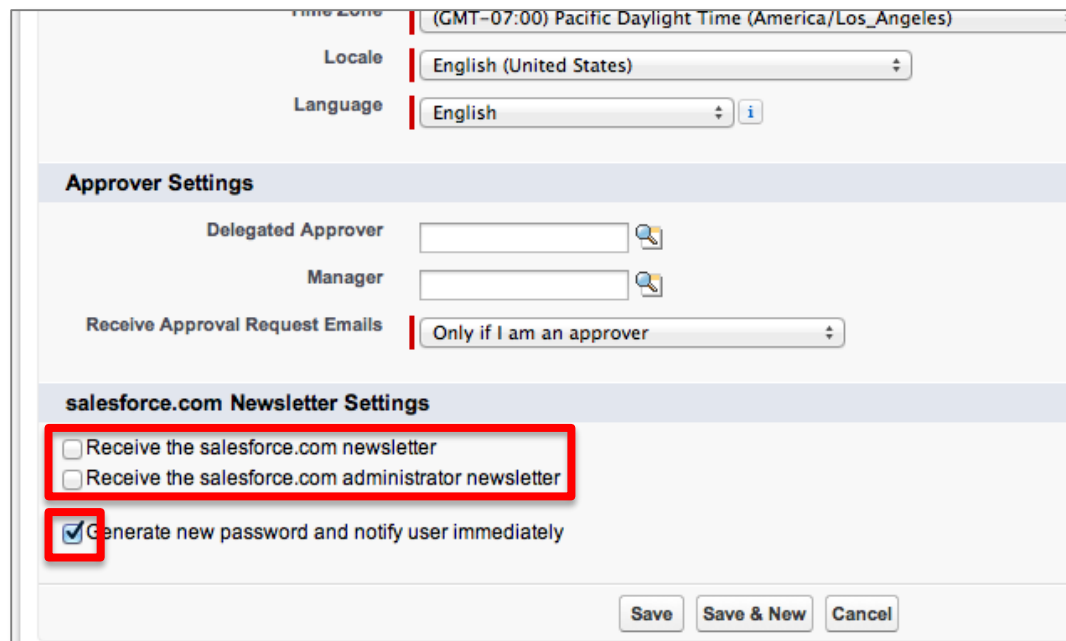
# Creating a New User in CRM

- **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



The screenshot displays a portion of the Salesforce user creation interface. At the top, there are dropdown menus for 'Time Zone' (set to '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'), 'Locale' (set to 'English (United States)'), and 'Language' (set to 'English'). Below these is the 'Approver Settings' section, which includes fields for 'Delegated Approver' and 'Manager', each with a search icon, and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver'. The 'salesforce.com Newsletter Settings' section follows, containing three checkboxes: 'Receive the salesforce.com newsletter' (unchecked), 'Receive the salesforce.com administrator newsletter' (unchecked), and 'Generate new password and notify user immediately' (checked). The first two checkboxes are grouped within a red rectangular box, and the third checkbox is also highlighted with a red square. At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel'.





# Creating a New User in CRM

- You can now navigate to [test.salesforce.com](https://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

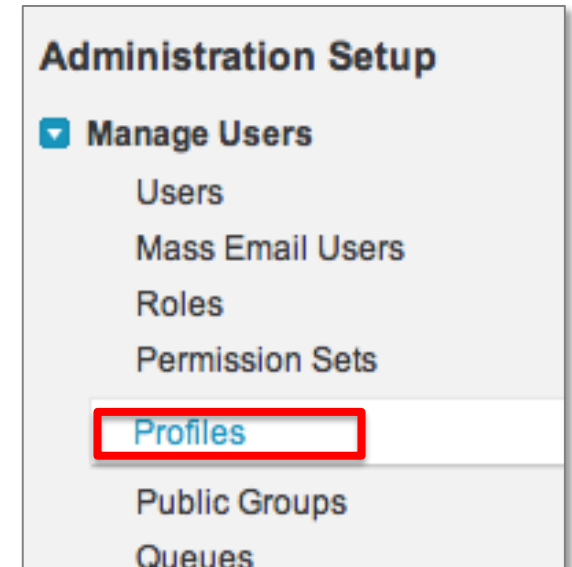
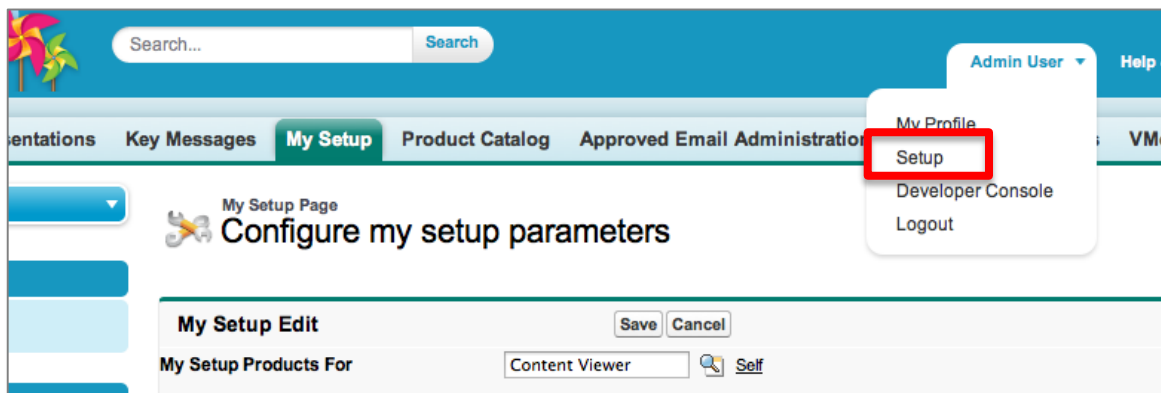
## Regional Manager

- Sales team manager who views (but cannot edit) CLM content



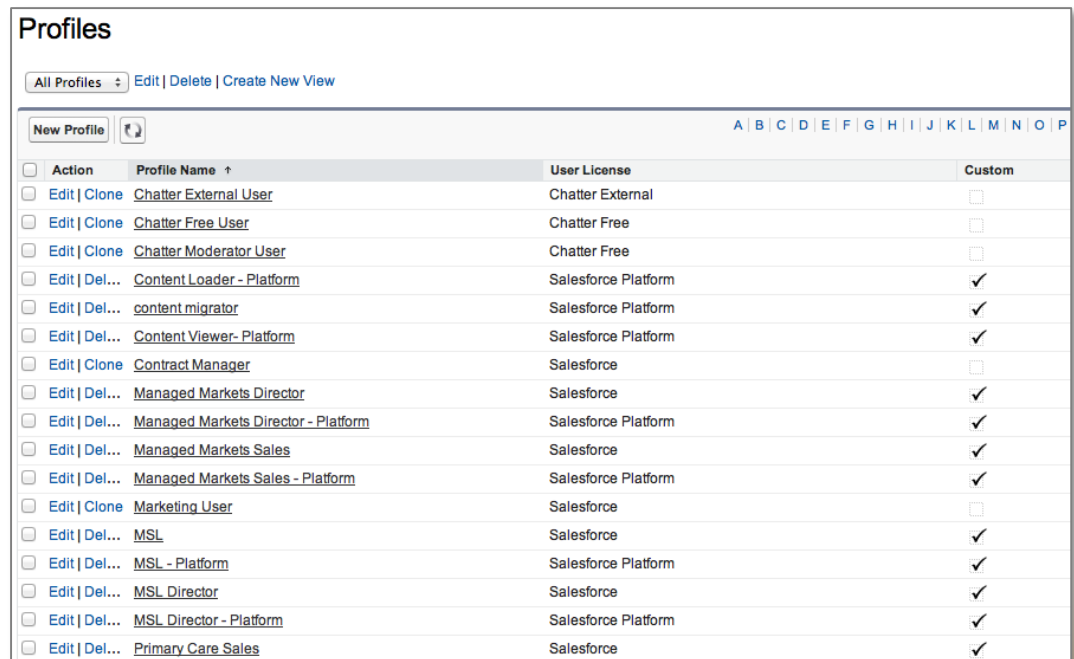
# Creating a New Profile in CRM

- **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

A screenshot of the Salesforce 'Profiles' page. At the top, there are links for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. Below this is a 'New Profile' button and a search icon. A table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column has checkboxes, some of which are checked. The table includes profiles like 'Chatter External User', 'Chatter Free User', 'Content Loader - Platform', 'content migrator', 'Contract Manager', 'Managed Markets Director', 'Managed Markets Sales', 'Marketing User', 'MSL', 'MSL Director', and 'Primary Care Sales'.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter External User</a>	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Free User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Moderator User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Content Loader - Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">content migrator</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Content Viewer- Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Managed Markets Director</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Managed Markets Director - Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Managed Markets Sales</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Managed Markets Sales - Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Marketing User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">MSL</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">MSL - Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">MSL Director</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">MSL Director - Platform</a>	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">Primary Care Sales</a>	Salesforce	<input checked="" type="checkbox"/>



# 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”

**Profile**  
**Primary Care Sales - Platform**  
[« Back to List: Profiles](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[1\]](#) | [Enabled Visualforce Page Access \[2\]](#)

**Profile Detail**

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

<b>Name</b>	Primary Care Sales - Platform		
<b>User License</b>	Salesforce Platform	<b>Custom Profile</b>	<input checked="" type="checkbox"/>
<b>Description</b>			
<b>Created By</b>	<a href="#">Admin User</a> , 6/19/2012 7:09 AM	<b>Modified By</b>	<a href="#">Admin User</a> , 6/19/2012 7:09 AM

**Console Settings**



# Creating a New Profile in CRM

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

## Clone Profile

Enter the name of the new profile.

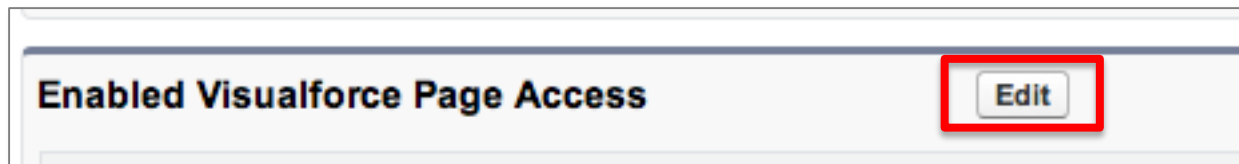
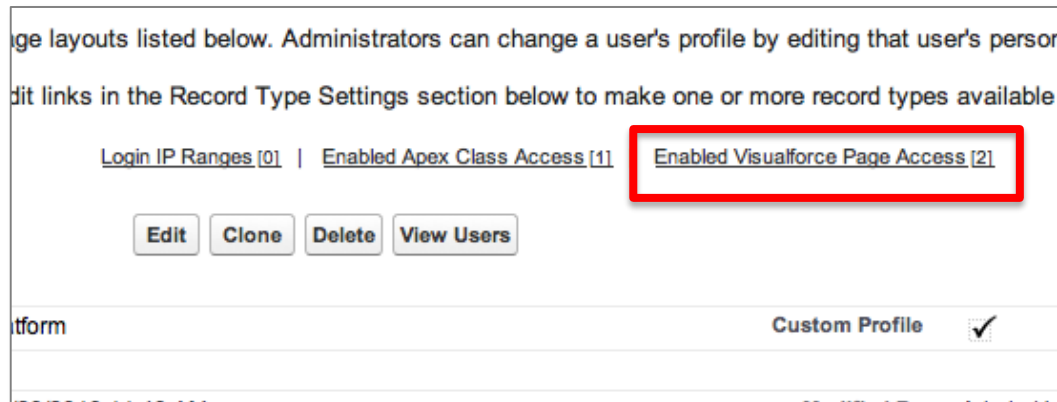
**You must select an existing profile to clone from.**

Existing Profile	Primary Care Sales - Platform
User License	Salesforce Platform
Profile Name	<input type="text"/>



# 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”

Save Cancel

**Available Visualforce Pages**

- VODRedirect\_4000\_vod
- VODRedirect\_Scroll\_1800\_vod
- VODRedirect\_Scroll\_4000\_vod
- VODRedirect\_ftp\_Small\_vod
- VODRedirect\_vod
- Veeva\_CRM\_Doc\_vod
- View\_Child\_Account\_vod
- View\_Cycle\_Plan\_vod
- View\_Inventory\_Sample\_Order\_vod
- View\_Inventory\_vod
- View\_Order\_vod
- View\_Quote\_vod

**Enabled Visualforce Pages**

- Clone\_Presentation\_vod
- Migrate\_CLM\_Presentation\_vod
- Media\_File\_vod

Add  
Remove



# Creating a New Profile in CRM

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

[to List: Profiles](#)

With this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[1\]](#) | [Enabled Visualforce Page Access \[3\]](#)

**Profile Detail**

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	test		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	<a href="#">Admin User</a> , 7/23/2013 11:43 AM	Modified By	<a href="#">Admin User</a> , 7/23/2013 11:43 AM

**Profile Settings**

Console Layout	<a href="#">[ Edit ]</a>
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**Page Layouts**



# 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.

[Go to List: Profiles](#)

With this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[1\]](#) | [Enabled Visualforce Page Access \[3\]](#)

**Profile Detail**

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	test
User License	Salesforce Platform
Description	Custom Profile ✓
Created By	Admin User, 7/23/2013 11:43 AM
Modified By	Admin User, 7/23/2013 11:43 AM

**Profile Settings**

Console Layout [\[ Edit \]](#)

**Page Layouts**

**Custom Tab Settings**

Account Plans	<a href="#">Default Off</a>
Alerts	<a href="#">Default On</a>
Analytics Admin	<a href="#">Tab Hidden</a>
Analytics Data Channels	<a href="#">Tab Hidden</a>
Analytics Product Groups	<a href="#">Tab Hidden</a>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All <a href="#">i</a>	Modify All <a href="#">i</a>
Account Lists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account List Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Merge Histories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# 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

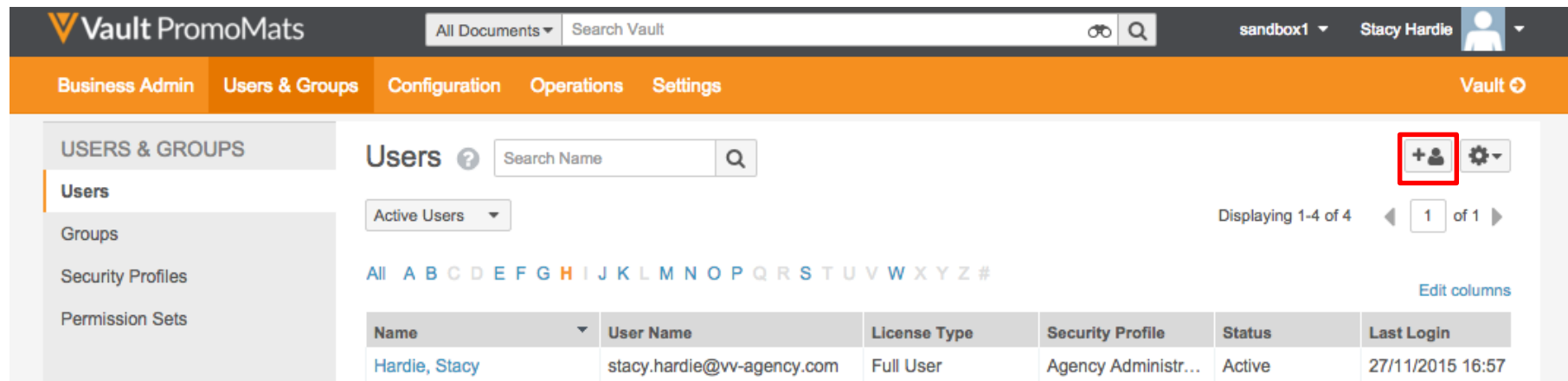
- To utilize your new profile, follow the steps outlined to create and update users and choose your profile from the dropdown menu.
- Reach out to your Program Manager for any additional assistance



# 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



**Vault PromoMats** All Documents Search Vault sandbox1 Stacy Hardie

Business Admin Users & Groups Configuration Operations Settings Vault

**USERS & GROUPS**

Users Groups Security Profiles Permission Sets

**Users** Search Name

Active Users

Displaying 1-4 of 4 1 of 1

All 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 # Edit columns

Name	User Name	License Type	Security Profile	Status	Last Login
Hardie, Stacy	stacy.hardie@vv-agency.com	Full User	Agency Administr...	Active	27/11/2015 16:57



# 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

[Users](#) >

Add User ?

### Primary Information

User Name\*  @vv-agency.com

Email\*

License Type \*

Security Profile \*

Domain Admin ☐

Last Login





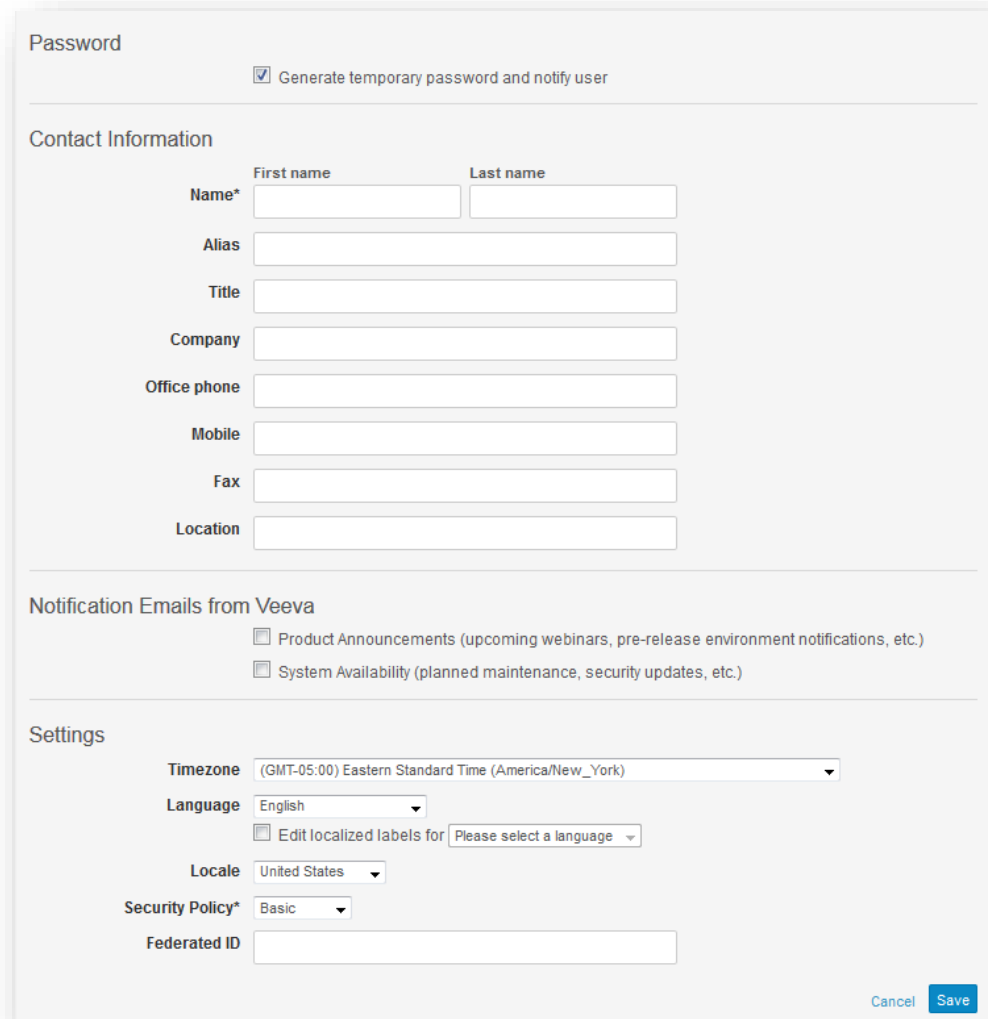
# Creating a New User in Vault

## ■ Password

- Select the checkbox to have a password generated and the user notified

## ■ Settings

- Timezone
- Language
- Locale
- Security Policy



The screenshot displays the 'Creating a New User in Vault' form, organized into several sections:

- Password:** Includes a checkbox labeled 'Generate temporary password and notify user' which is checked.
- Contact Information:** Contains input fields for 'First name', 'Last name', 'Name\*' (a combined field), 'Alias', 'Title', 'Company', 'Office phone', 'Mobile', 'Fax', and 'Location'.
- Notification Emails from Veeva:** Includes two checkboxes: 'Product Announcements (upcoming webinars, pre-release environment notifications, etc.)' and 'System Availability (planned maintenance, security updates, etc.)'.
- Settings:** Contains dropdown menus for 'Timezone' (set to '(GMT-05:00) Eastern Standard Time (America/New\_York)'), 'Language' (set to 'English'), 'Locale' (set to 'United States'), and 'Security Policy\*' (set to 'Basic'). There is also an 'Edit localized labels for' checkbox and a 'Please select a language' dropdown. A 'Federated ID' input field is located at the bottom of this section.

At the bottom right of the form are 'Cancel' and 'Save' buttons.



# 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](mailto: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

The screenshot displays the 'Primary Information' tab for a user in the Veeva Vault system. The user's status is 'Active', and a 'Change Status' link is available. The user's name is 'anna.jones@vv-agency.com' and their email is 'stacy.hardie@veeva.com'. The 'License Type' is 'Full User' and the 'Security Profile' is 'Agency Administrator'. The 'Domain Admin' checkbox is unchecked, and the 'Last Login' is '30/11/2015 10:58 GMT'. The 'Details' tab is selected, and an 'Edit' button is visible in the top right corner.

Tab	Value
Status	Active <a href="#">Change Status</a>
User Name	anna.jones@vv-agency.com
Email	stacy.hardie@veeva.com
License Type	Full User
Security Profile	Agency Administrator
Domain Admin	<input type="checkbox"/>
Last Login	30/11/2015 10:58 GMT



# Creating a New User in Vault

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

## Notification Emails from Veeva

- ☒ Product Announcements (upcoming webinars, pre-release environment notifications, etc.)
- ☒ System Availability (planned downtime, security updates, etc.)



# 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

## Veeva Support

You can grant Veeva Support access to this account. Select how long you need to grant access and then click on the "grant access" button.

**Duration**

Select a duration

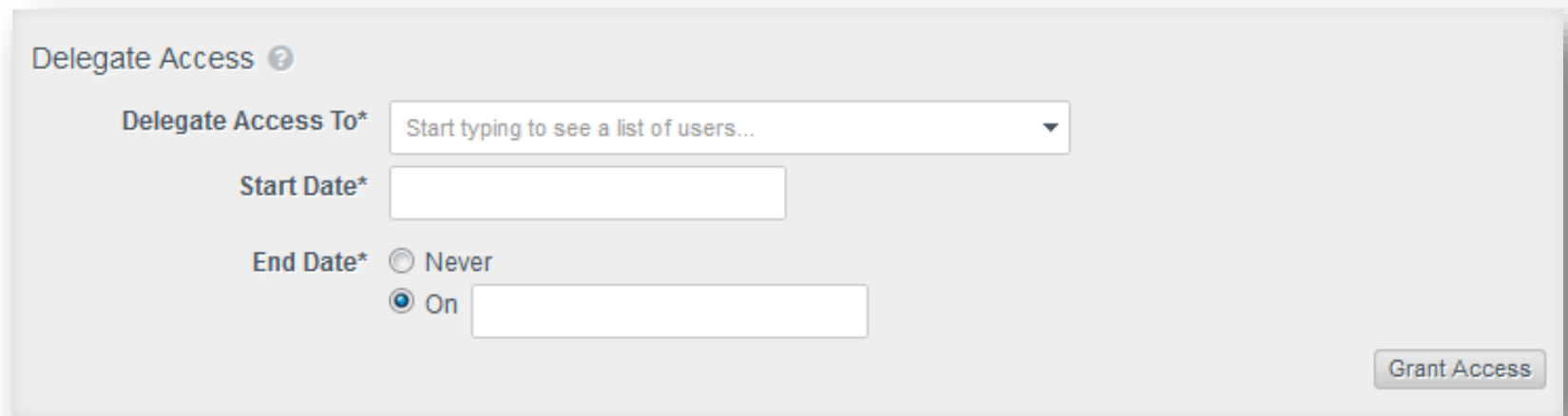


Grant Access



# Delegate User Access

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



The screenshot shows a 'Delegate Access' form with the following fields and options:

- Delegate Access To\***: A dropdown menu with the placeholder text 'Start typing to see a list of users...'.
- Start Date\***: A text input field.
- End Date\***: Radio button options for 'Never' and 'On', followed by a text input field.
- Grant Access**: A button in the bottom right corner.





Thank You