



# veeva

**iRep  
Technical Training**

# Agenda

---

- **Company Overview**
- **Getting Started**
- **Media File Size and Format Guidelines**
- **Design Philosophies**
- **Media Packaging**
- **Content Administration**
- **Creating a User**
- **Creating a Profile**
- **Migrating Content**
- **Reports and Dashboards**
- **Java Script Library**
- **Working Together**

# Company Overview



# Company Overview



## Veeva CRM

- Prebuilt, role-specific functionality
- Built on Force.com multichannel platform for easy administration and extensibility

### iRep

- Single app for integrated CRM + CLM on the iPad

### Reporting and Field Insights

- Completely integrated part of Veeva CRM
- Online and offline reporting for reps and managers

### 3 Major Updates Throughout the Year

- Notifications, release notes, and webinars to educate on enhanced functionality

## Life Sciences Industry

- Pharma and Biotech – Rx
- Consumer Health – OTC
- Animal Health – Companion and Livestock

# Commercial Suite of Products

**Veeva CRM**

- Built on SFDC
- Life sciences industry
- Houses account and interaction data

**Veeva CRM**  
Approved Email

- Approved email for reps
- Non-personal promotion to complement iRep
- Track and measure behavior

**Veeva iREP**

- Integrated CRM + CLM
- iPad and Windows 8 ready
- Robust metrics to easily “close the loop”

**Veeva is enabling life sciences companies to deliver customer-centric, compliant interactions through integrated multichannel capabilities.**

# Getting Started



# Logging On

---

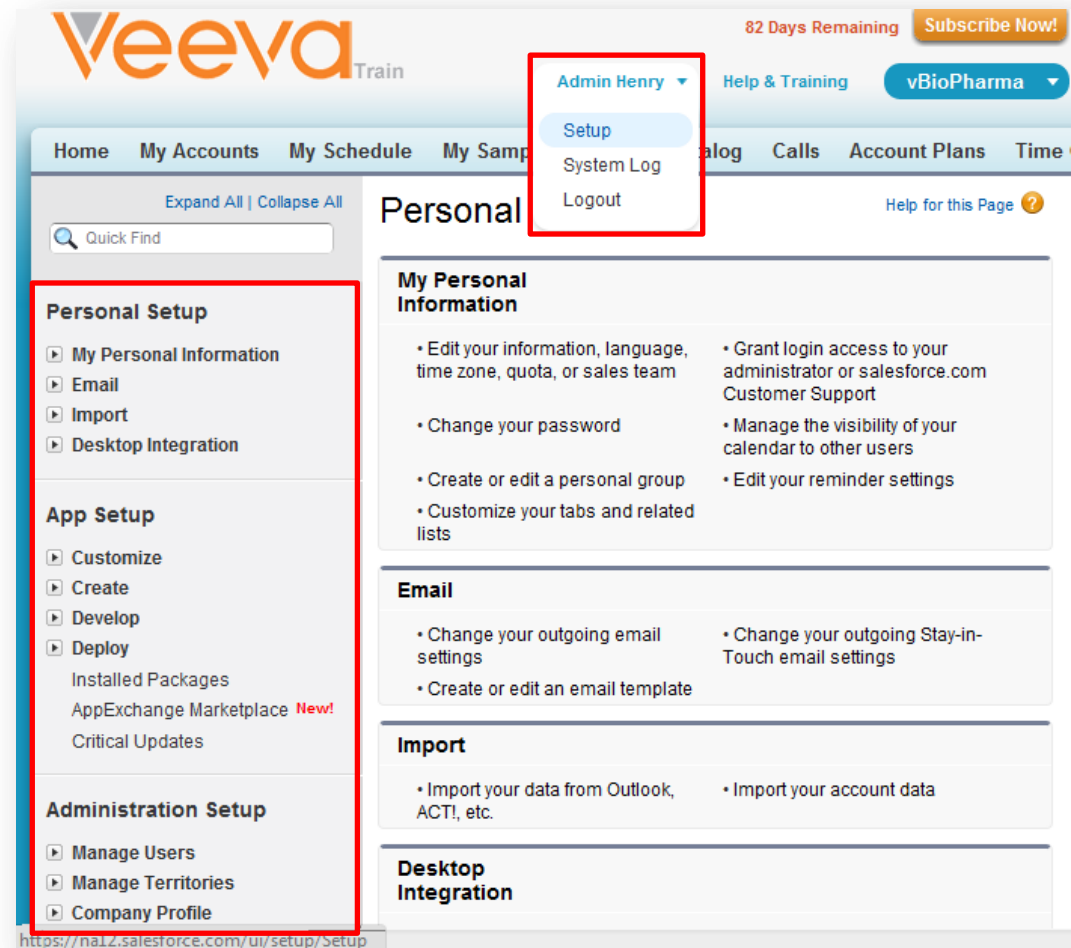
## ➤ **Review your customized Getting Started Guide**

- ▶ Contains all login credentials needed to be successful with iRep
  1. Agency Portal
  2. Support Portal
  3. Community Portal
  4. cloader AND cviewer users to administer and download content in iRep
  5. FTP Site

## ➤ **Don't forget to change the password associated with each email so that it is linked to someone on your team!**

# Navigating the System Administration Tool Setup Menu

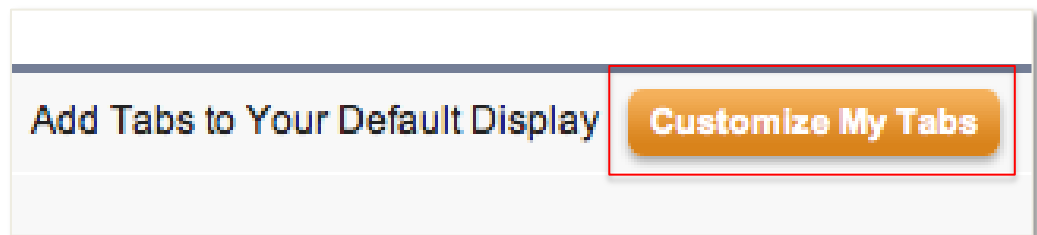
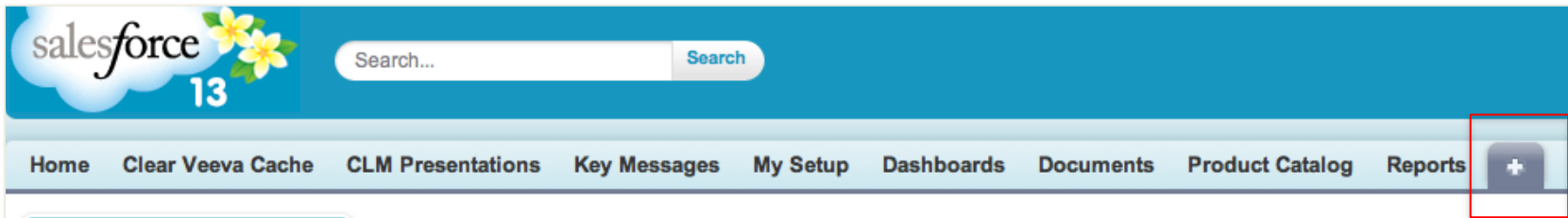
- **Log in to the System Administration Tool**
  - ▶ Sandbox:  
<https://test.salesforce.com>
- **All configuration is performed in Veeva CRM Online**
- **Content Loader → Setup**
  - ▶ Personal Setup
  - ▶ App Setup
  - ▶ Administration Setup
- **Most CLM-related configuration occurs in the *App* and *Administration* menus**



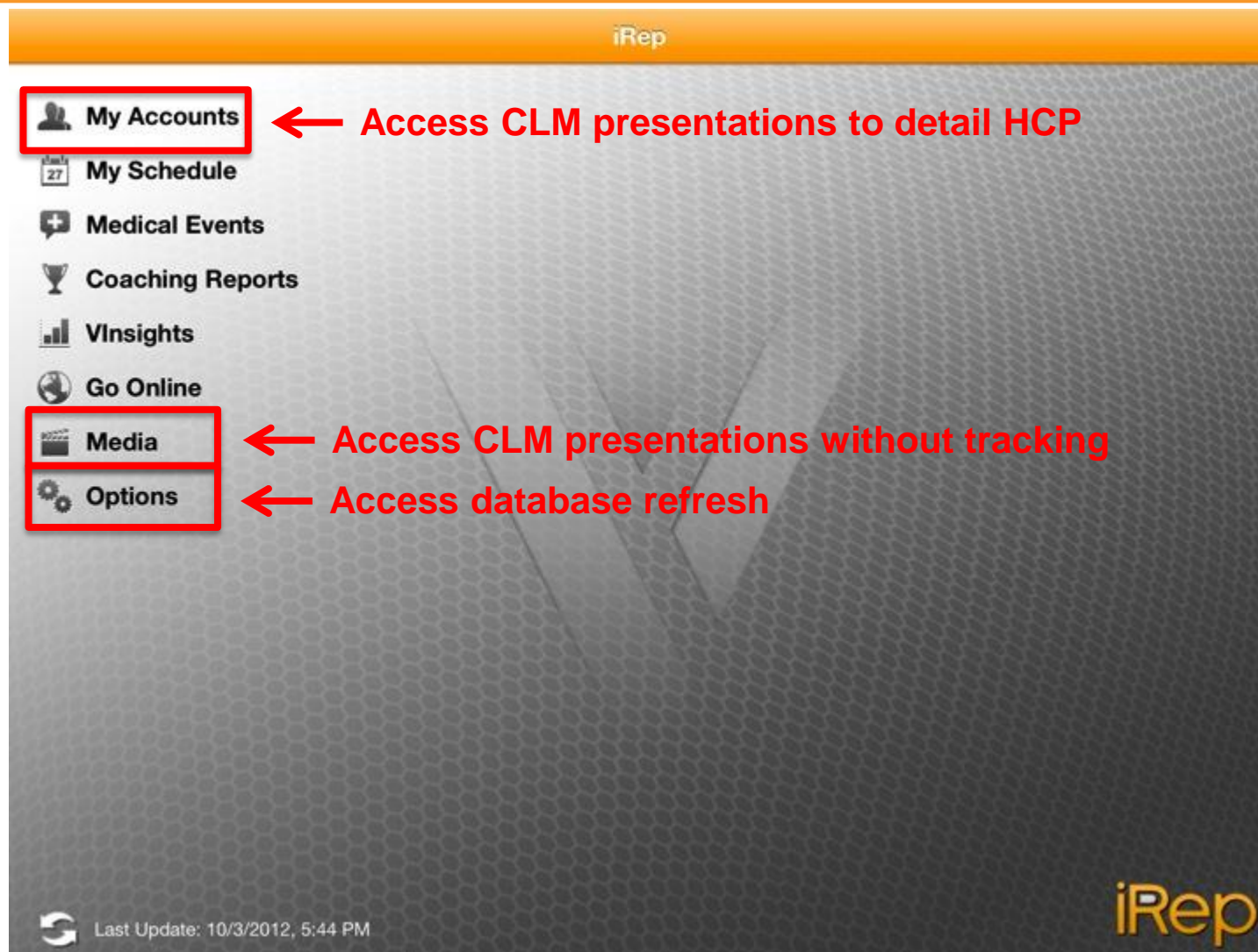


# Navigating Veeva Tabs (Objects)

- **Most navigation occurs between the tabs located along the top of your window**
- **Select the “+” to access the full list of objects**
  - ▶ Select “Customize My Tabs” to update what tabs live along the top of the window



# Navigating the iRep Home Screen

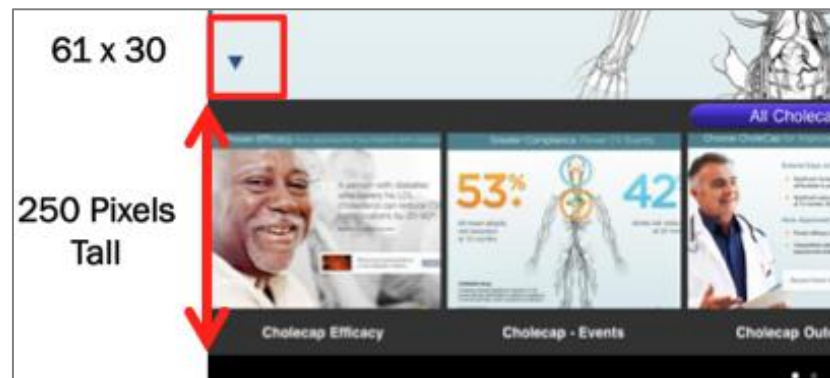
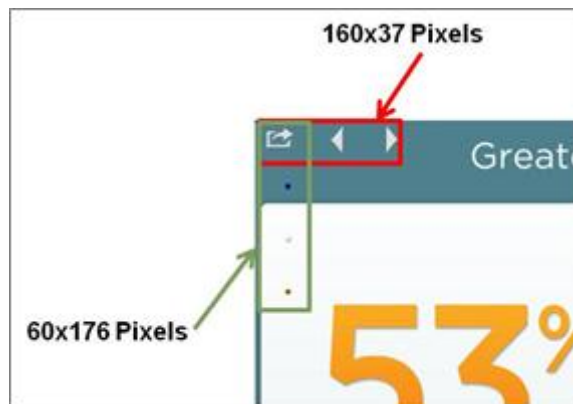


# Media File Size and Format Guidelines



# Content Basics for iRep

- iRep displays HTML, Video, Images, and PDFs
- Veeva CLM utilizes the iOS UIWebView class
- Media displays full-screen with a resolution of 1024 x 768
- Media displays in landscape mode only
- Native iRep controls shown below cannot be reskinned or disabled
  - ▶ Reaction buttons are only exception, which can be disabled via configuration online



# Media File Recommendations

---

- **Provide images at 2048 x 1536 to allow the sales representative to zoom in on parts of the media**
  - ▶ Even complex images at this resolution can be compressed to about 250KB without visibly impacting quality.
- **1024x768 images should be less than 100KB each**
  - ▶ If images are significantly larger than this, changing the quality settings or using a different tool to create the jpgs can reduce their size.
- **Guidelines for Retina Display**
  - ▶ Content at this quality level has four times the pixels, which results in larger files, which will increase sync times.

# File Size Recommendations

- **There are two main concerns regarding the size of media**
  - ▶ *Download time*- While the iPad can hold 16GB of files or more, downloading that amount of content over 3G (or even WiFi) would take many hours
  - ▶ *Display speed*- The larger the files, the greater potential for choppy transitions between slides
- **The recommended size of all media for a rep's device is 200MB**
  - ▶ This recommendation is for the entire content library present on each iPad
  - ▶ While there is no technical limitation for larger media libraries, longer sync times and degraded performance of media might offset the advantages of having larger, more complex files

A typical download time is estimated in the tables below.

Data	Value
File size	200 MB
Average download Speed <sup>2</sup>	1,000 kbs
Estimated download time	52 minutes

# Memory Recommendations

---

- **While it is possible to load very large, complex HTML5 into iRep, the application may crash if those files use up all the memory on the device**
  - ▶ Test displaying and interacting with HTML5 content repeatedly to ensure memory issues will not occur
  - ▶ Memory warnings may appear in the log on the device to identify possible memory issues, although a warning may not always appear and a warning may not always indicate an impending crash
  - ▶ XML parsing within HTML5, while it may be technically possible, has been known to use up all the memory
  - ▶ Test with an iPad 1 to ensure compatibility across versions

**NOTE:** Avoid using custom fonts as they have been known to use up too much memory in the UIWebView, causing them to revert suddenly to fonts supported by iOS.. Using fonts supported by iOS7 from the beginning solves the issue, otherwise, the user must restart the iRep app when the fonts change. The list of fonts available in iOS can be found on the links below:

- <http://support.apple.com/kb/HT5878>
- <http://www.iosfonts.com>

# Content Compatibility Between iPad and Win8

➤ Existing CLM content reusability varies based on the content type:

## HTML

- Re-work is required if agencies use a fixed width 4:3 aspect ratio or any webkit (Mobile Safari) specific HTML code. Additionally, legacy CLM API functions will not work on Windows 8. The most current version of the CLM Javascript library, which Veeva provides, works with both iRep and Windows 8 CLM content.

## Videos

- All current CLM video types are supported on Windows 8. Typically they are created using a 4:3 aspect ratio on iRep. Windows 8 devices typically use a 16:9 aspect ratio. Videos in 4:3 aspect ratio will display with black bars on the right and left side.

## Images

- All current CLM image types are supported on Windows 8. Typically, they are created using a 4:3 aspect ratio on iRep. Windows 8 devices typically use a 16:9 aspect ratio. Images in 4:3 aspect ratio display with black bars on the right and left side.

## PDF

- PDF documents will scroll and zoom in/zoom out similarly to how they do in iRep. No changes required.



# Design Philosophies

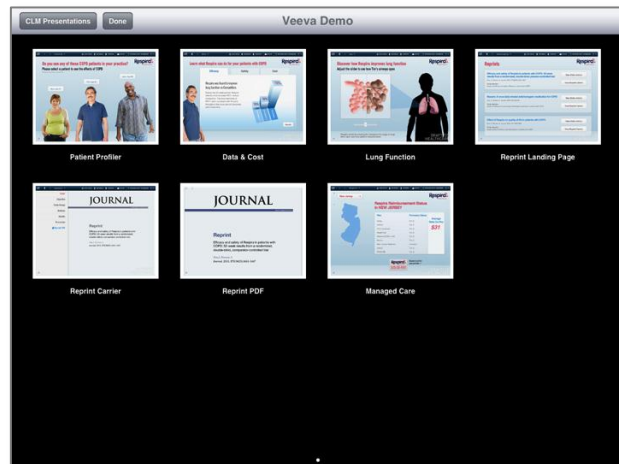


# Veeva Design Philosophies: Wide vs. Deep

- There are two main design philosophies discussed at Veeva with customers and agencies partners that are crucial to wireframes:

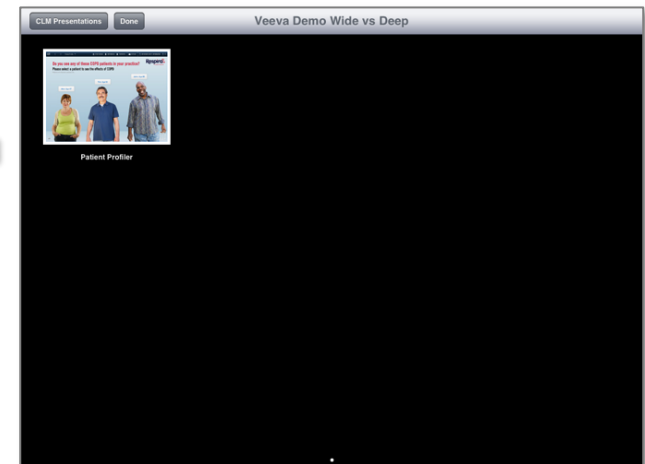
## Wide Content

- Equivalent to a 7 page print sales aid with **7 individual assets** loaded into iRep.



## Deep Content

- Equivalent to a 7 page print sales aid with **only 1 highly interactive asset** loaded into iRep.



# Executive Summary

- **Both “Wide” and “Deep” content are supported within iRep**
- **“Wide” content advantages include:**
  - ▶ Modular nature of wide content is easier to update
  - ▶ Smaller content file sizes may improve sync and navigation performance
  - ▶ Native key message tracking and call reporting (no coding necessary)
  - ▶ Take advantage of new feature enhancements
- **“Deep” content advantages include:**
  - ▶ Reduced content administration as fewer slides to manage
- **When creating content from scratch, “wide” is generally preferred**
- **Regardless of design philosophy chosen, it is recommended to create a “Key Message Map” upon project completion to ensure files are properly loaded in the Production environment**

Wireframes are crucial to a successful iRep implementation;  
consider BOTH user experience\* AND data needs\*\* at this time

\* “User experience” refers to both design and flow as well as time required for sync

\*\* “Data needs” refer to what data points will the brand team need and how to go about capturing them

# Media Packaging






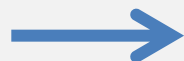
# Content Packaging


After creating a piece of media, some preparation of that media must be done before it can be loaded into the system. Overall, the process involves creating lower resolution versions of the media, putting all files into a folder, and compressing the folder into a zip file. Each piece of media in the system will be encapsulated into a separate zip file before loading.

Type	Name	Resolution	Typical Size
Original Media	Media1.jpg	2048 x 1536	250 kb
Preview Image	Media1-full.jpg	1024 x 768	70 kb
Thumbnail	Media1-thumb.jpg	200 x 150	7 kb


## JPG Example

 Medline\_Plus.jpg      JPEG image  
 Medline\_Plus-full.jpg      JPEG image  
 Medline\_Plus-thumb.jpg      JPEG image










 Medline\_Plus      File folder




  
Medline\_Plus.zip


## HTML5 Example

 css      File folder  
 fonts      File folder  
 images      File folder  
 js      File folder  
 Cholecap-4-Therapy Days.html      HTML Document  
 Cholecap-4-Therapy Days-full.jpg      JPEG image  
 Cholecap-4-Therapy Days-thumb.jpg      JPEG image



 Cholecap-4-Therapy Days



  
Cholecap-4-Therapy Days.zip

# **Content Administration**



# Typical Model for Content Creation

- Agency works with customer's CLM Administration team to ensure environments match for data capture and migration

## Content Creation



2. Upload to Sandbox

Agency 1  
Sandbox

Agency 2  
Sandbox

Agency 3  
Sandbox

6. Migrate approved content to customer environments

## Customer Org

### QA Sandbox

7. Final testing of content and reports

### Production

9. Migrate content

1. Content creation & packaging according to Veeva Content Guidelines

- Agency hands off content to designated customer facing team WITH Key Message Map

- Agency works with Veeva Program Manager for guidance on content creation and agency org administration



8. Final Approval



10. Deploy to end users

# System Administration Tool

The screenshot displays the Veeva System Administration Tool interface. At the top, there is a search bar and navigation links for 'Admin User', 'Help & Training', and 'Configuration'. Below this, a tabbed interface shows 'Key Messages' as the active tab, with other tabs including 'CLM Presentations', 'My Setup', and 'VMobile Object Configurations'. The 'Key Messages' section has a 'Home' link and a 'View: All' dropdown. A 'New' button is located above the 'Recent Key Messages' table. The table lists various messages with columns for Message, Description, Product, and Product Strategy.

Message	Description	Product	Product Strategy
<a href="#">CVD Prevalence</a>	What is the Prevalence of CVD in your State?	<a href="#">Cholecap</a>	
<a href="#">Personal Information</a>	Personal Information	<a href="#">Relievent</a>	
<a href="#">Question</a>	Question	<a href="#">Relievent</a>	
<a href="#">Intro Page</a>	Splash Page	<a href="#">Cholecap</a>	
<a href="#">Video</a>	KOL Videos	<a href="#">Cholecap</a>	
<a href="#">Video</a>	Patient Testimonial	<a href="#">Cholecap</a>	
<a href="#">Therapy Days</a>	Therapy Days	<a href="#">Cholecap</a>	
<a href="#">The Risk</a>	The Risk	<a href="#">Relievent</a>	
<a href="#">Switching</a>	Would Switching to Cholecap Make a Difference?	<a href="#">Cholecap</a>	

1. Navigate to the “Key Messages” tab
2. Select “New”



# System Administration Tool

Search... Search Admin User Help & Training

CLM Presentations **Key Messages** My Setup VMobile Object Configurations +

Key Message Edit  
New Key Message

Key Message Edit Save Save & New Cancel

Information

Message Efficacy Owner Admin User

Description This is the efficacy slide Custom Reaction

Product Cholecap Language --None--

Display Order

Disable Actions Available  
Swipe\_vod  
Pinch\_To\_Exit\_vod

Active ☒

Save Save & New Cancel

3. Enter copy for the “Message”
4. Enter copy for “Description”  
(this text will appear underneath all thumbnails in iRep)
5. Select the magnifying glass and search for the Product to which you will associate this Key message

# System Administration Tool

Sandbox: test

Search... Search Admin User Help & Training Co

CLM Presentations **Key Messages** My Setup VMobile Object Configurations

Key Message Efficacy

Customize Page | Edit Layout | Printable View | Help

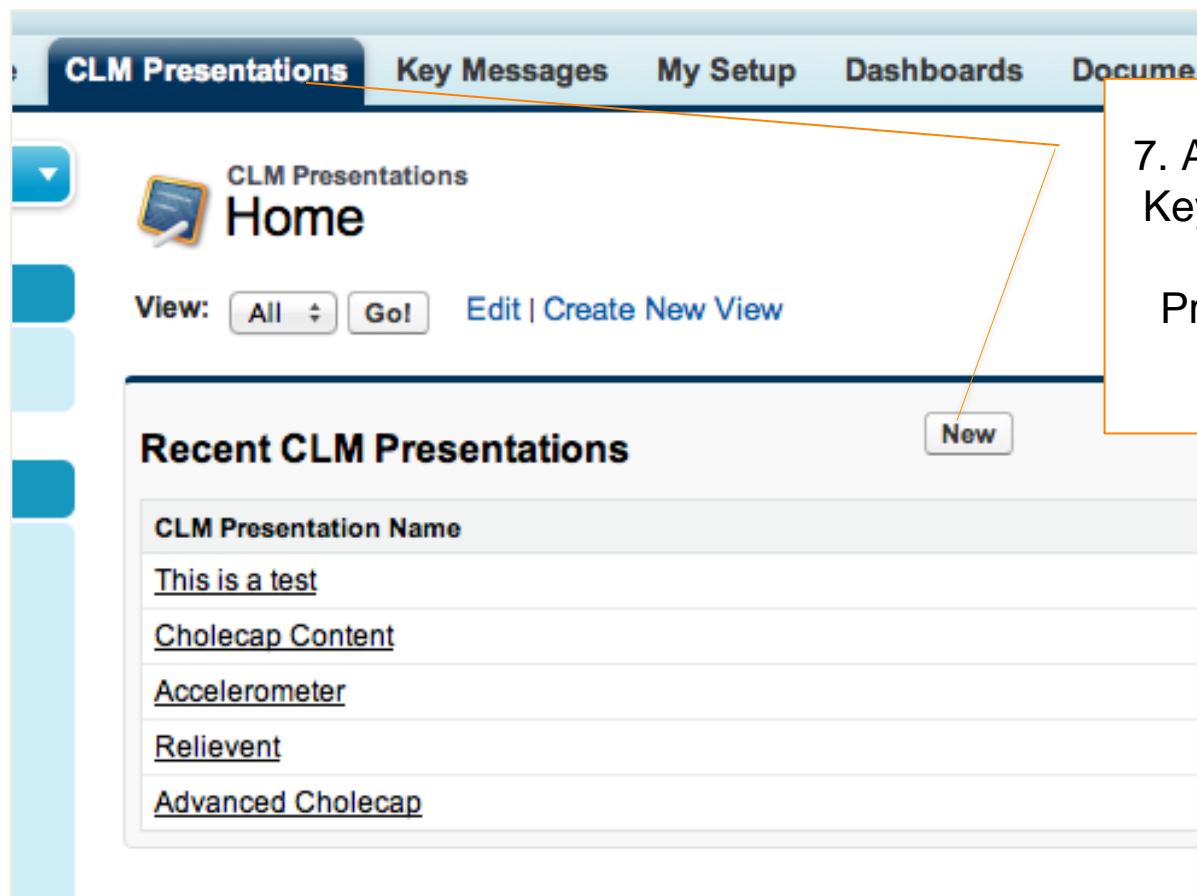
CLM Presentation Slides [0]

**Key Message Detail** Edit Delete Clone

Message	Efficacy	Owner	Admin User [Change]
Description	This is the efficacy slide		
Product	Cholecap	Custom Reaction	
Display Order		Language	
Active	<input checked="" type="checkbox"/>	Disable Actions	?
Media File Name	<input type="text" value="Upload"/>		
Media File Size			

6. Select "Upload" to load the desired .zip file from your local drive

# System Administration Tool



7. After loading all of your Key Messages, navigate to the “CLM Presentations” tab and select “New”

# System Administration Tool

CLM Presentation Edit  
New CLM Presentation

CLM Presentation Edit [Save] [Save & New] [Cancel]

**Information**

CLM Presentation Name: Cholecap Update

Presentation Id: [ ]

Product: Cholecap [magnifying glass icon]

Default Presentation: ☐

Training Content: ☐

Hidden?: ☐

Owner: Admin User

Approved? ☒

[Save] [Save & New] [Cancel]

8. Enter the name of the presentation
9. Select the magnifying glass to search for the desired product to which you will associate this presentation

# System Administration Tool

This screenshot shows the 'CLM Presentation Slides' management interface. At the top, there are buttons for 'Edit', 'Delete', 'Clone', and 'Migrate'. Below this, there are two sections: 'CLM Presentation Slides' and 'CLM Presentation Slides (Sub Presentation)'. Each section has a 'New CLM Presentation Slide' button and a 'CLM Presentation Slides Help' link. Both sections currently display 'No records to display'.

This screenshot shows the 'New CLM Presentation Slide' form. The form has a header with 'CLM Presentation Slide Edit' and 'New CLM Presentation Slide'. Below the header, there are buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into an 'Information' section, which includes fields for 'CLM Presentation', 'Key Message', 'Display Order', and 'Sub Presentation'. The 'CLM Presentation' field is populated with 'Cholscap Update'. The 'Key Message' field is populated with 'Efficacy'. The 'Display Order' field is populated with '1'. The 'Sub Presentation' field is empty. There is also an 'External ID' field. A red exclamation mark icon indicates required information.

10. Once the presentation has been created, scroll down and select “New CLM Presentation Slide”
11. The “CLM Presentation” name will populate automatically
12. Select the magnifying glass to search for your desired Key Message
13. Enter the display order desired for this slide
14. Enter an “External Id” (required if migrating)

# FTP Upload

---

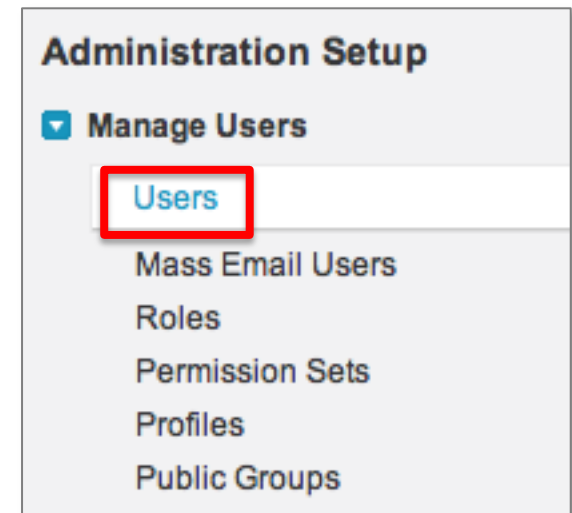
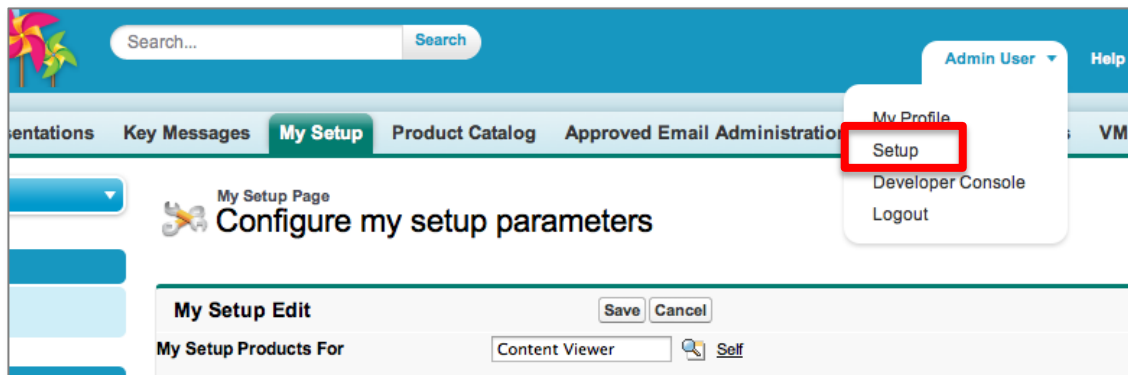
- **Allows for bulk load of multiple files at a time or for loading files that are larger than 50MB, such as video files**
- **Content can be loaded using any FTP client (eg, Filezilla or Cyberduck)**
- **When working in customer provisioned environments, the FTP credentials for the CLM org will be renewed every 3 months**
  - ▶ All FTP support and questions for customer environments must be logged with support as they cannot be addressed by the Program Management team

# Creating a User



# Creating a New User

- **Each partner sandbox comes with 29 users**
  - ▶ 4 of which can be System Administrator licenses
- **Navigate to the Setup Screen**
  - ▶ Then navigate to Administration Setup>Manage Users>Users





# Creating a New User

- 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	ag22vw	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	
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Lakes, Larry	LLakes	llakes1321552039346@veeva.partner6.test		Medical Scientific Liaison	✓	MSL - Platform	
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Fairchild, Mark	mfair	mfairchild1321552039346@veeva.partner6.test		Sales Representative	✓	Content Loader - Platform	
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Matthews, Mitch	mmatt	mmathews1321552039346@veeva.partner6.test		Director, Medical Science	✓	MSL Director - Platform	
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Jones, Sarah	sjones	sjones1321552039346@veeva.partner6.test		Sales Representative	✓	Primary Care Sales - Platform	

# Creating a New User

## ➤ 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

User Edit: Kari Blaze

Save Save & New Cancel

General Information

First Name: Kari

Last Name: Blaze

Alias: kblaz

Email: kblaze@veeva.partner

Username: kblaze132155203934

Nickname: kblaz

Title:

Department: veeva

Division:

Role: Regional Accounts Executive

User License: Salesforce Platform

Profile: Managed Markets Sales - Platform

Active: ☒

Marketing User: ☐

Offline User: ☐

Sales Anywhere User: ☐

Wireless User: ☐

Force.com Flow User: ☐

Salesforce Classic User: ☐

Mobile Configuration:

Data.com User Type: --None--

Data.com Monthly Addition Limit: --None--

Accessibility Mode: ☐

Color-Blind Palette on Charts: ☐

Allow Forecasting: ☐

Call Center:

Phone:

Extension:

Fax:

Mobile:

Email Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Employee Number:

# Creating a New User

- 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

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Locale: English (United States)

Language: English

**Approver Settings**

Delegated Approver: [Text Field]

Manager: [Text Field]

Receive Approval Request Emails: Only if I am an approver

**salesforce.com Newsletter Settings**

☐ Receive the salesforce.com newsletter

☐ Receive the salesforce.com administrator newsletter

☒ Generate new password and notify user immediately

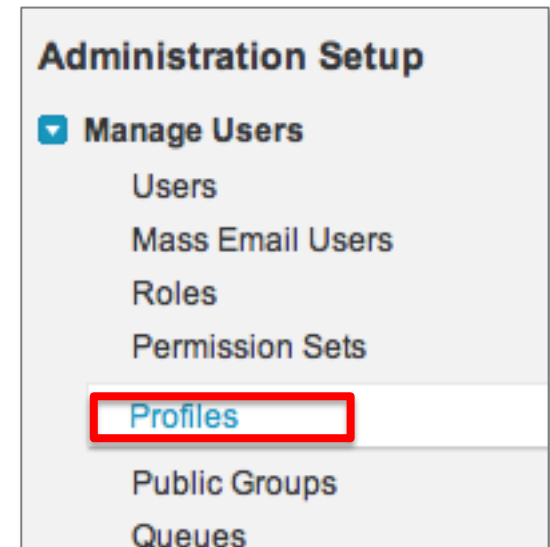
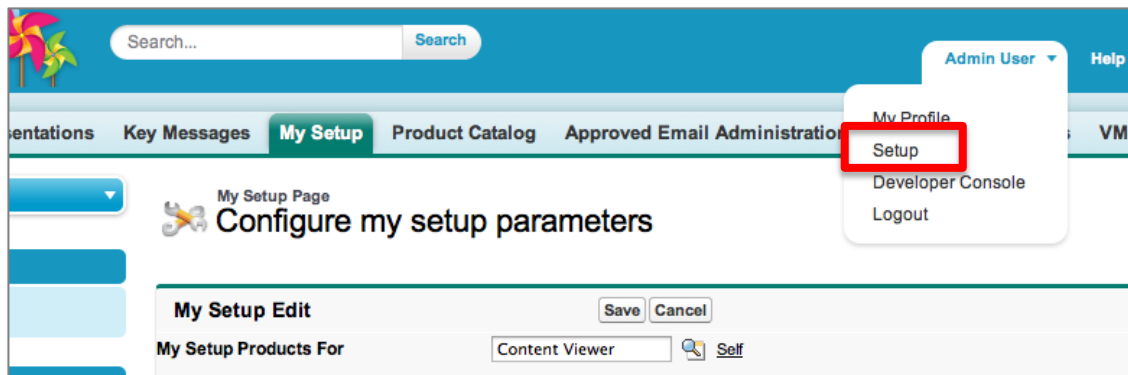
Save Save & New Cancel

# Creating a Profile



# Creating a New Profile

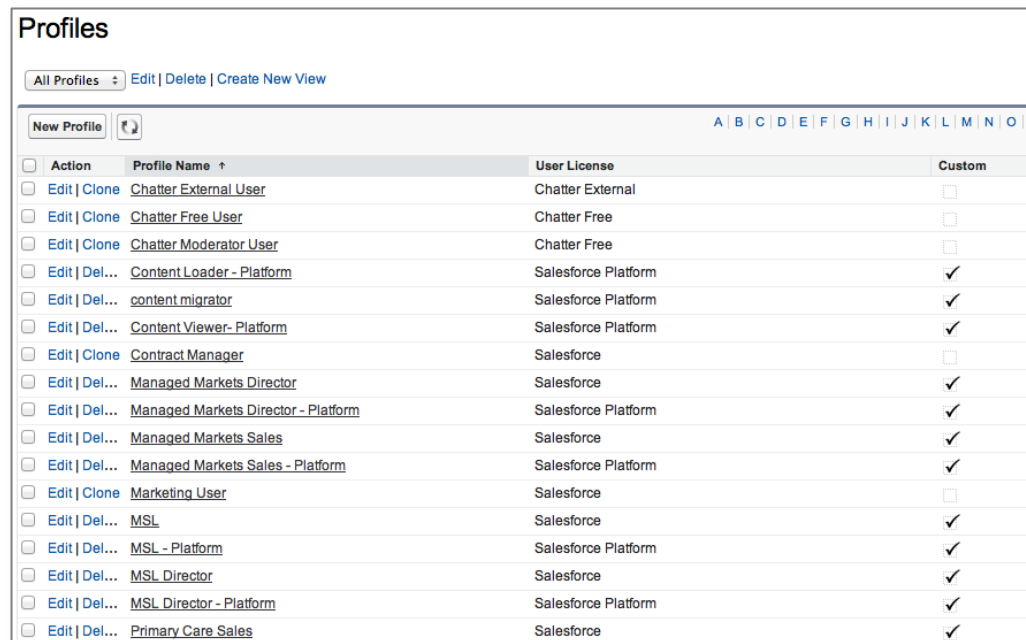
- **Navigate to the Setup Screen from the dropdown along the top**
  - ▶ Then, navigate to Administration Setup>Manage Users>Profiles



# Creating a New Profile

## ➤ 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's a header 'Profiles' with a dropdown menu set to 'All Profiles' and links for '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 table includes profiles like 'Chatter External User', 'Chatter Free User', 'Content Loader - Platform', 'Managed Markets Director', and 'Primary Care Sales'. Each row has an 'Edit' link, a 'Clone' link, and a 'Delete' link. The 'Custom' column has checkboxes, some of which are checked.

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

# Creating a New Profile

- For agencies creating CLM content, the best practice is to Clone the “Content Viewer- Platform” profile to use as a base
- 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 o 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](#)

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

**Console Settings**

# Creating a New Profile

- Enter a unique, identifiable name for your new profile
- Once you select “save” the new profile will be created

**Clone Profile**

Enter the name of the new profile.

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

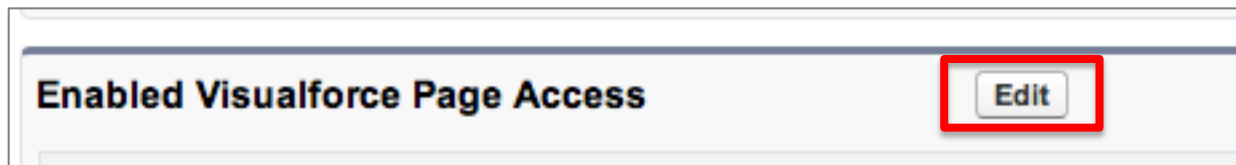
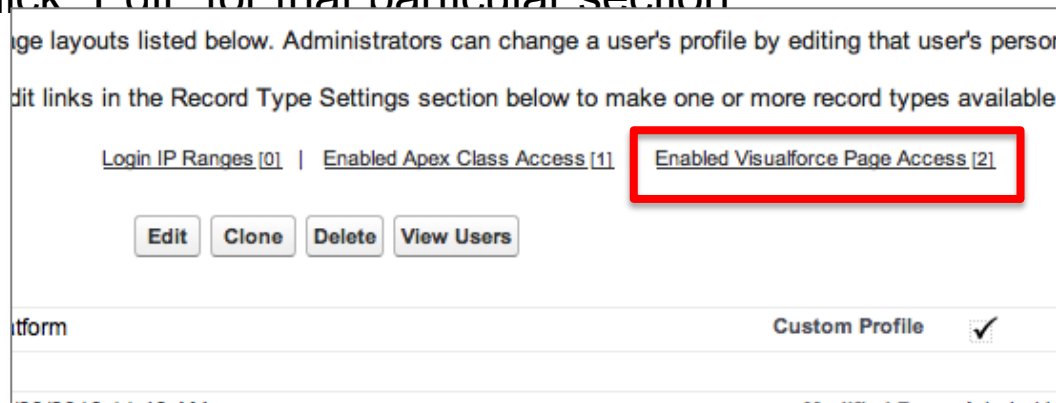
Existing Profile	Primary Care Sales - Platform
User License	Salesforce Platform
Profile Name	<input type="text"/>

**Save** **Cancel**



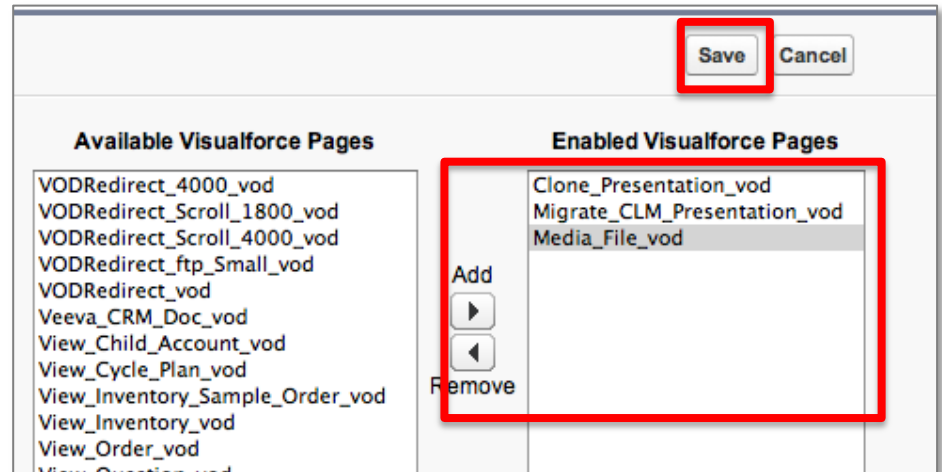
# Creating a New Profile

- 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

- **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

- 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	Admin User, 7/23/2013 11:43 AM		Modified By Admin User, 7/23/

**Profile Settings**

Console Layout	<a href="#">[ Edit ]</a>
----------------	--------------------------

**Page Layouts**

# Creating a New Profile

- 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](#)

Users 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	✓
Description			
Created By	Admin User, 7/23/2013 11:43 AM	Modified By	Admin User, 7/23/2013 11:43 AM

**Profile Settings**

Console Layout	<a href="#">[ Edit ]</a>
----------------	--------------------------

**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

---

- **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

**NOTE: Reach out to your Program Manager for any additional assistance**

**Confidential Information**

©2013 Veeva Systems



# Migrating Content



# Migrate Content

- Once content is approved and verified in an agency sandbox, it often needs to be migrated for viewing in a customer sandbox by the brand team.

The screenshot displays the Veeva CLM Presentations interface. The top navigation bar includes the Veeva logo, a search bar, and user options. The main content area shows the 'CLM Presentation Detail' for 'Cholecap Base'. A red box highlights the 'Approved?' checkbox, which is checked. A yellow callout box points to this checkbox with the text: 'Only approved and active Key Messages and Presentations can be migrated to Production'.

CLM Presentation Detail

CLM Presentation Name: Cholecap Base

Owner: Admin User [Change]

Type: HQ

CLM Presentation Slides [3]

Buttons: Edit, Delete, Sharing, Migrate, Clone

Notes:

- Approved? ☒
- Product: Cholecap
- Presentation Notes: Cholecap original presentation from InTouch Solutions.

Visibility:

- MSL: ☒
- Sales: ☒
- Hidden?: ☐
- Training Content: ☐

# Migrate Content

## 1. Select the CLM presentation to migrate and click Migrate

CLM Presentation  
**Cholecap Base**

[Back to List: CLM Presentations](#)

[Customize Page](#) | [Edit Layout](#) | [Print](#)

[CLM Presentation Slides](#) (9)

**CLM Presentation Detail**

[Edit](#) [Delete](#) [Sharing](#) **[Migrate](#)** [Clone](#)

CLM Presentation Name	Cholecap Base	Owner	Admin User <a href="#">[Change]</a>
Presentation Id		Type	HQ
		Group	

▼ **Notes**

Approved?	<input checked="" type="checkbox"/>
Product	<a href="#">Cholecap</a>
Presentation Notes	Cholecap original presentation from InTouch Solutions.

▼ **Visibility**

MSL	<input checked="" type="checkbox"/>	Default Presentation	<input type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	Hidden?	<input type="checkbox"/>
		Training Content	<input type="checkbox"/>



# Migrate Content

## 2. Clicking Migrate will display the list of presentations, related slides, and key messages that will be migrated in one package at the same time

The screenshot shows the Veeva CLM Migrate interface. The top navigation bar includes links for Home, CLM Presentations, Key Messages, Product Catalog, Dashboards, and Reports. The main content area displays a message: "You have chosen to migrate Cholecap Blue Presentation. Please review the list of records that will be migrated. Then, enter login credentials for the destination org and click 'Migrate'. If you do not wish to Migrate, click Cancel." Below this message is a list of items to be migrated, categorized into CLM Presentation, CLM Presentation Slide, and Key Message. To the right of the list is a login form for the destination organization, which includes fields for Type, Username, and Password. A red box highlights the login form, and a yellow callout bubble points to it with the text "Log in to the destination org".

Home CLM Presentations Key Messages Product Catalog Dashboards Reports +

**Messages and Alerts**

Alert! Cholecap just approved on formulary at Aetna of NJ!

**Custom Links**

Verteo Intranet  
PubMed  
HR Portal  
fda.gov  
Mass E-mail

**VMobile Install**

VMobile Install

**Recent Items**

Cholecap Blue  
Cholecap Base  
Cholecap Efficacy  
Cholecap Intm

You have chosen to migrate Cholecap Blue Presentation. Please review the list of records that will be migrated. Then, enter login credentials for the destination org and click 'Migrate'. If you do not wish to Migrate, click Cancel.

CLM Presentation  
Cholecap Blue  
Disclaimer

CLM Presentation Slide  
CPS-000000016  
CPS-000000020  
CPS-000000014  
CPS-000000018  
CPS-000000019  
CPS-000000015  
CPS-000000022  
CPS-000000017  
CPS-000000021

Key Message  
Cholecap Comparison  
Cholecap Video  
Welcome Doctor  
CVD in your state  
Cholecap Results  
Preferred Statin  
Verteo Portal  
Switching to Cholecap  
Disclaimer

Type: Production  
Username: Production  
Password: Sandbox

Log in to the destination org

# Migrate Content

## 3. Review any error messages

- ▶ Some errors may need to be resolved with the Customer and/or Services team

You have chosen to migrate Cholecap Blue Presentation. Please review the list of records that will be migrated. Then, enter login credentials for the destination org and click 'Migrate'. If you do not wish to Migrate, click Cancel.

CLM Presentation  
Cholecap Blue  
Disclaimer  
CLM Presentation Slide  
CPS-000000027  
CPS-000000030  
CPS-000000031  
CPS-000000028  
CPS-000000029  
CPS-000000033  
CPS-000000034  
CPS-000000035  
CPS-000000038  
CPS-000000032  
Key Message  
Welcome Doctor  
Switching to Cholecap  
CVD in your State  
Preferred Statin  
Cholecap Comparison  
Verteo Portal  
Cholecap Patient Video  
Cholecap Results  
Investigator Interest?  
Disclaimer

Type:   
UserName:   
Password:

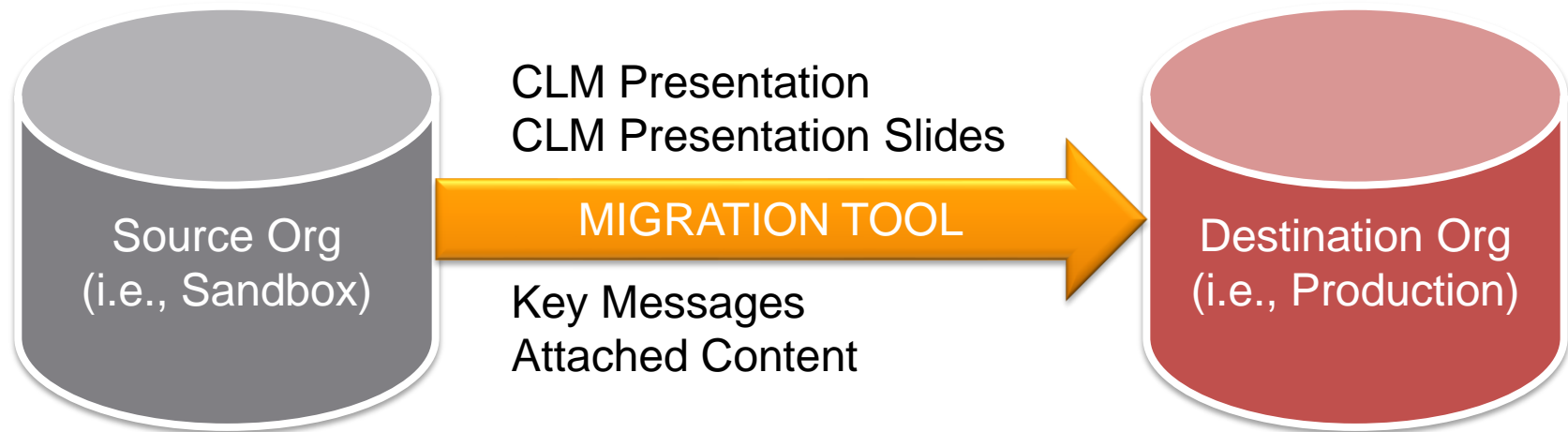
Source Org Error:

- \* The presentation Cholecap Blue has not been approved. Please retry to migrate it after the approval process is complete
- \* Slide CPS-000000027(a1XG0000000Hg3AMAS) has no value for external id column External\_ID\_vod\_c
- \* Slide CPS-000000030(a1XG0000000Hg3PMAS) has no value for external id column External\_ID\_vod\_c
- \* Slide CPS-000000031(a1XG0000000Hg3UMAS) has no value for external id column External\_ID\_vod\_c
- \* Slide CPS-000000028(a1XG0000000Hg3FMAS) has no value for external id column External\_ID\_vod\_c
- \* Slide CPS-000000029(a1XG0000000Hg3KMAS) has no value for external id column External\_ID\_vod\_c

Only *approved* presentations can be migrated to Production

Every record in the source org must have a unique External ID so that it can be matched with records in the destination org

# Migration Results



➤ **Destination org now contains:**

- CLM Presentation
- CLM Presentation Slides
- Key Messages
- Attached Content

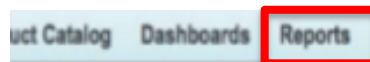
➤ **Any records that exist in the destination org will be overwritten**

# Reports and Dashboards



# Create a Report

- Navigate to the Reports Tab



Click the **New Report** button

Reports & Dashboards **New Report...** New Dashboard...

## Create New Report

Select Report Type

Select the Report Type:  
For CLM search for Calls  
with Call Key Messages  
and Product

To create the report,  
click the **Create** button

Cancel Create

# Customize the Report

**Fields Pane**

Save Save As Use Report Properties Run Report

**Fields** All #

Quick Find

Drag and drop to add fields to the report.

- Call: Last Modified Alias
- Call: Last Modified Date
- Call: Last Activity Date
- Call Key Message: Info
- Call Key Message: ID
- Call Key Message: Key Mess
- Account
- Attendee Type
- Category
- CLM ID
- Contact
- Date
- # Display Order
- # Duration
- Entity Reference Id
- # Is Parent Call?
- Key Message
- Mobile ID
- # Override Lock
- Presentation ID
- Reaction
- Segment

**Filters** Add

Show My calls

Date Field Assignment Datetime

To add filters, click Add.

**Use Report Filters to limit number of records displayed in the report**

**Select the report format: Tabular, Summary, Matrix**

**Preview Pane**

**Preview** Summary Format Show Add Chart Remove All Columns

Call: Call Name	Call Key Message: Key Message Name	Product: Product Name	Key Message	Reaction	Duration
Drop a field here to create a grouping. Hide					
C00000446	CMT00000642	Smith1 CLMProd	HankSmith1 Preferred Statin	Neutral	5
C000004397	CMT00000639	Smith1 CLMProd	HankSmith1 Preferred Statin	Positive	6
C000004399	CMT00000639	Smith1 CLMProd	Smith1 CLMProd Intro	Positive	4
C000004398	CMT00000639	Smith1 CLMProd	Smith1 CLMProd Intro	Positive	3
Grand Totals (4)					

This preview shows the report data.

**Drag and drop desired fields from the Fields pane into the Preview pane**

**Example: To group by Account, drag the field to the grouping area**

# Add Report Charts

- To add a chart to the report:
  - ▶ Click the **Add Chart** button and enter chart properties

Select a chart type

Specify Y and X axis columns

Plot additional values to display combination charts

The Chart Editor dialog box is shown with the following configuration:

- Select Type:** Bar chart (selected)
- Chart Data:**
  - Y-Axis:** Sum of Duration
  - X-Axis:** Account
  - Group By:** -- Select --
- Combination Charts:**
  - ☒ Plot additional values
  - Display:** Line
  - Value:** Record Count
  - ☐ Use second axis

The preview on the right shows a bar chart with green bars for 'Sum of Duration' and a blue line for 'Record Count' across three accounts: Clinton Ack..., Henry Allen, and Jorge Almog... The Y-axis ranges from 0 to 40.

Account	Sum of Duration	Record Count
Clinton Ack...	35	3
Henry Allen	5	2
Jorge Almog...	5	2

Preview chart as you build it

# Javascript Library for CLM Content Development





# Why did we create the JavaScript Library?

---

- **Makes it easier to interact with Veeva CRM to create personalized and dynamic HTML5 CLM Presentations**
  - ▶ Replacement functions for all the existing CLM APIs
  - ▶ Content creators are familiar with using JavaScript libraries
    - Do not have to deal with 'document.location'
- **Expands functionality**
  - ▶ Allows for querying of specific objects (i.e. Order Management, Surveys)
    - Returns multiple Salesforce record IDs
  - ▶ We will build on the functionality as we find out what content creators want
- **Provides more detailed error messages**

# How to use it

---

- **Include the .js file with the content (inside the .zip file)**
- **Reference the JavaScript library in the header of the HTML**
- **Use com.veeva.clm namespace**
  - ▶ `com.veeva.clm.getDataForCurrentObject("Account","ID", myAccountID);`
- **Use the JavaScript functions in a chain**
  - ▶ Call the second JavaScript function in the first function's callback function or after the callback of the first function is finished.
  - ▶ May result in unexpected return values if the JavaScript functions are not properly chained.

# Methods

## ▶ General

- getProduct\_MySetup
- getAddresses\_Account
- getAddressFields
- getRecordType\_Object

## ▶ Replaces Current API Calls

- getDataForCurrentObject
- getDataForObject
- createRecord
- updateRecord
- gotoSlide
- nextSlide
- prevSlide

Most commonly used  
API calls for  
customization and  
data capture

## ▶ Surveys

- getSurveyQuestions\_Survey
- getQuestionResponse\_SurveyTarget
- getSurveyTarget\_Account

## ▶ Order Management

- getProduct\_OrderActive\_Account
- getProductGroup\_Product
- getLastTenOrders\_Account
- getOrderLines\_Order
- getListPrice\_Product

Reference CLM Content Creation Guidelines for full details

# Things to know...

---

- **Internal APIs were created to support the JavaScript Library but are not supported for public use**
  - ▶ Content creators can figure out how to use them by reading the JavaScript Library, so we can't prevent them from using it
  - ▶ The Support team cannot answer questions on them
- **Use caution when retrieving/saving data from (basically, not supported)**
  - ▶ Long Text Area
  - ▶ Rich Text Area
  - ▶ Encrypted Text Area
- **Download the file from the Customer Support Portal**
  - ▶ CRM Documentation Links -> JavaScript Library for CLM
- **Follow the JavaScript Library on the Community portal to get update notices**
  - ▶ [http://crmcommunity.veevasystems.com/veevacrm/topics/javascript\\_library\\_for\\_clm](http://crmcommunity.veevasystems.com/veevacrm/topics/javascript_library_for_clm)

# Working Together



# Resource Portals

---

Support Portal- [www.veeva.com/support](http://www.veeva.com/support)

- Log tickets directly with our global team of engineers when technical questions/concerns arise
- Please remember, this team does not resolve code issues unrelated to Veeva APIs
- Do NOT log level 1 or 2 cases as these are reserved for product outages

Agency Portal- [www.veeva.com/support](http://www.veeva.com/support) (scroll down)

- Log in to register for training sessions, receive announcements, and access the library of agency partner-specific documentation
- Contains documentation on sandbox configuration for CLM-related features

Community Portal- <http://www.veeva.com/veeva-communities/>

- Log feature requests and join discussions on industry best practices
- Subscribe to discussions for automated updates (i.e. Java Script library)

Refer to your Getting Started Guide and/or your Program Manager  
for login credentials to each portal

# Support Portal

---

## In Scope

- ▶ Content API Issues
- ▶ FTP Functions
- ▶ Migration
- ▶ Org Configuration Issues
- ▶ User Permissions
- ▶ Custom Fields/Objects
- ▶ VMobile Object Configuration
- ▶ Key Message Sharing

## Out of Scope

- ▶ HTML5/JavaScript coding outside Veeva API
  - Custom plugins
  - Custom functionality
- ▶ Design/Architecture best practices

# veeva

