



# Offline Configuration (iPad)

Veeva Professional Services

# Module Objectives

- **Discuss common offline configuration including**
  - Installation
  - Home Page
  - Offline Documents
  - Menus visibility
  - VMobile Object Configurations (VMOC)
  - Offline Validation Rules
  - Synchronization



# What is Veeva CRM (iPad)?

- An integrated CRM and CLM application designed for the iPad
- Same architecture as other Veeva offline applications such as Windows and Blackberry
- Uses the same configuration as Veeva CRM online
- Synchronizes with Veeva CRM online and achieves full CRM capabilities on the iPad



# Home Page Installation Link

- The CRM (iPad) Installation link can be displayed on the home page left sidebar for users
  - Setup → Customize → Home → Home Page Layout

**Step 1. Select the components to show**

Choose the components to include on your home page layout.

Layout Name

**Select Wide Components to Show**

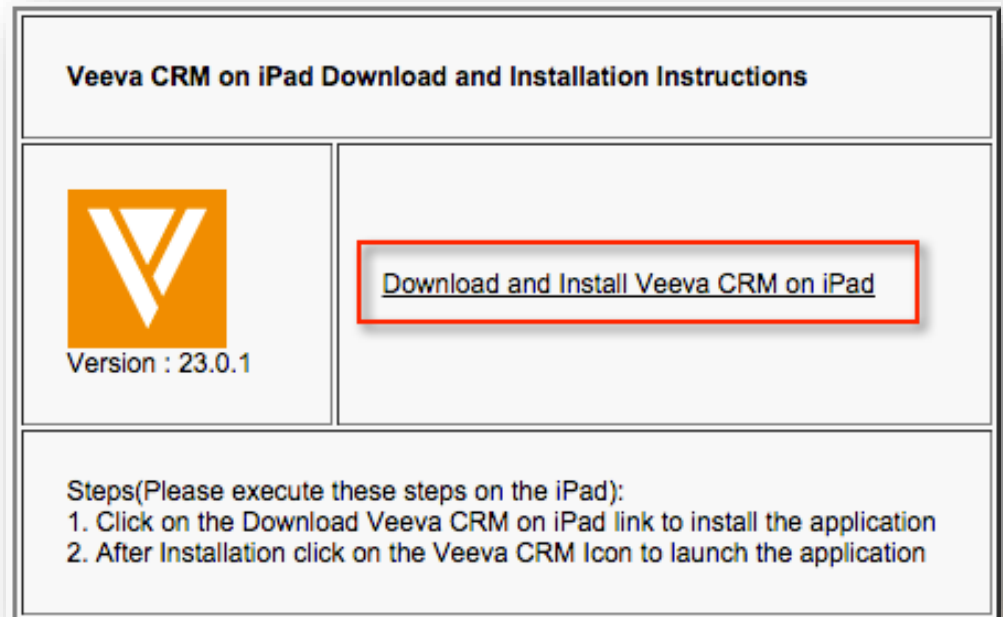
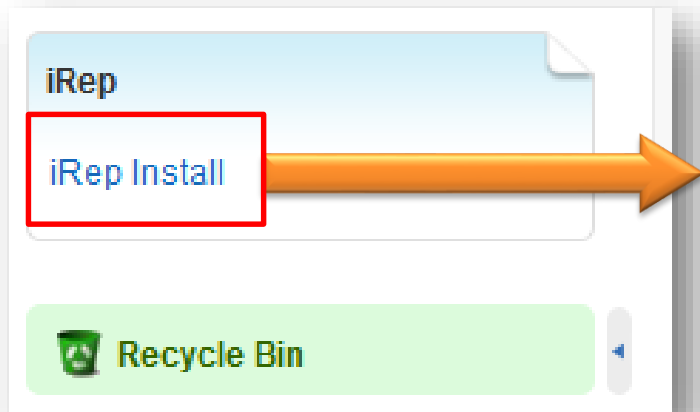
Items to Approve	<input checked="" type="checkbox"/>	Calendar	<input type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>	Dashboard Snapshot	<input checked="" type="checkbox"/>
Managed Markets Alerts	<input type="checkbox"/>	MSL Alerts	<input type="checkbox"/>
Specialist Alerts	<input type="checkbox"/>		

**Select Narrow Components to Show**

Sidebar Search	<input checked="" type="checkbox"/>	Create New...	<input type="checkbox"/>
Document Search	<input type="checkbox"/>	Recent Items	<input checked="" type="checkbox"/>
Solution Search	<input type="checkbox"/>	Messages & Alerts	<input checked="" type="checkbox"/>
Product Search	<input type="checkbox"/>	Custom Links	<input type="checkbox"/>
Veeva CRM Help	<input checked="" type="checkbox"/>	VMobile Install	<input checked="" type="checkbox"/>
<b>iRep</b>	<input checked="" type="checkbox"/>	Veeva CRM on Windows 8	<input checked="" type="checkbox"/>
Admin Links	<input type="checkbox"/>		

# CRM (iPad) Installation

- Login to Veeva CRM online using Safari from the iPad
- Click the iRep Install link from the homepage
- Click Download and Install Veeva CRM on iPad



# Initial Login and Synchronization

- To log in, click the Veeva CRM app on the iPad Home Screen
- User Name and Password are the same as logging in to Veeva CRM online
- Veeva CRM (iPad) can store multiple user logins
- First sync time varies depending on the amount of data and CLM content (when applicable)



Welcome to Veeva

sarah.jones@tech.demo

.....

Sign In

The logo for Verteopharma, featuring a stylized orange 'V' with green leaves on either side, and the text 'Verteopharma' below it.

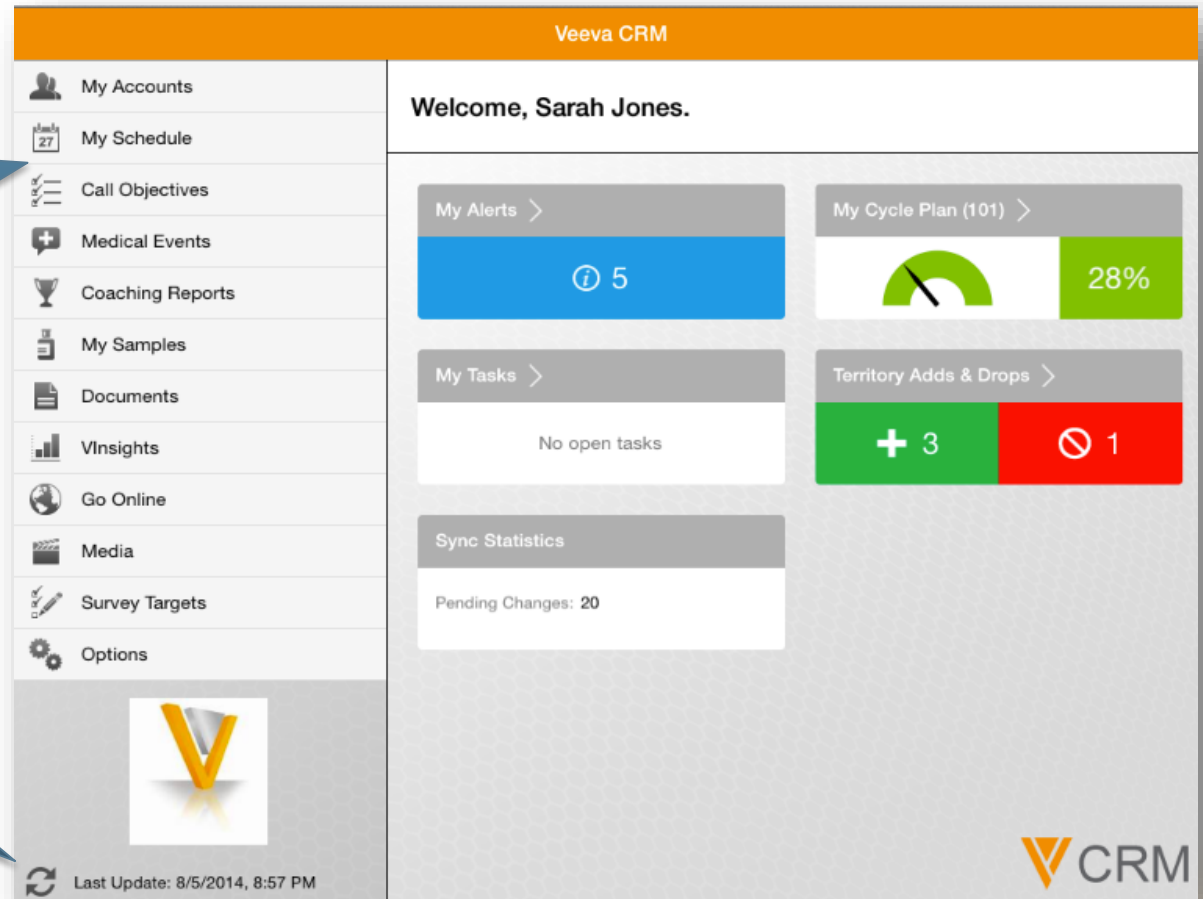


# Home Page

- First page displayed after login

Use the navigation menu items to access the different functions of iRep

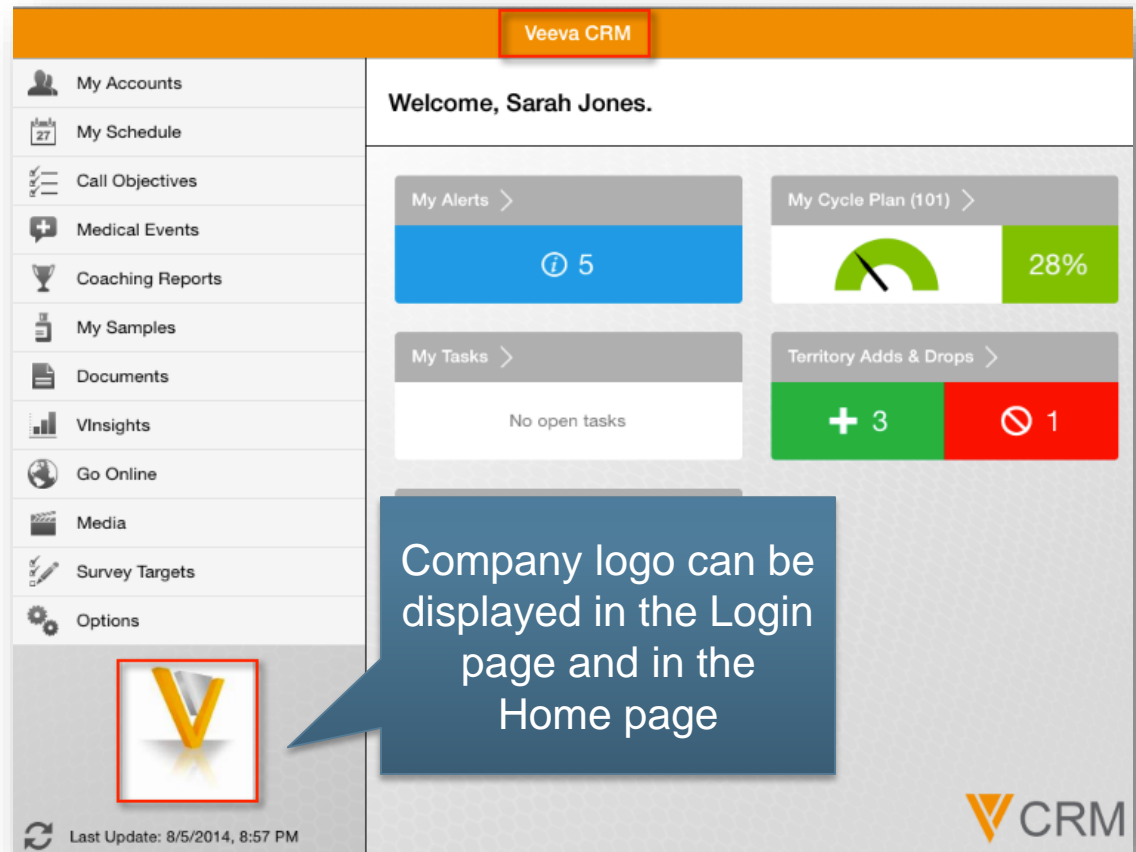
Click the **Sync** button to synchronize



The screenshot displays the Veeva CRM Home Page. The interface features a top orange header with the text "Veeva CRM". On the left is a vertical navigation menu with icons and labels for: My Accounts, My Schedule, Call Objectives, Medical Events, Coaching Reports, My Samples, Documents, VInsights, Go Online, Media, Survey Targets, and Options. Below the menu is a large yellow "V" logo and a "Sync" button with a circular arrow icon. At the bottom of the menu area, it says "Last Update: 8/5/2014, 8:57 PM". The main content area on the right has a white header with "Welcome, Sarah Jones.". Below this are four dashboard widgets: "My Alerts" showing 5 alerts, "My Cycle Plan (101)" showing a 28% progress gauge, "My Tasks" showing "No open tasks", and "Territory Adds & Drops" showing 3 adds and 1 drop. A "Sync Statistics" widget shows "Pending Changes: 20". The Veeva CRM logo is in the bottom right corner.

# User Interface Branding

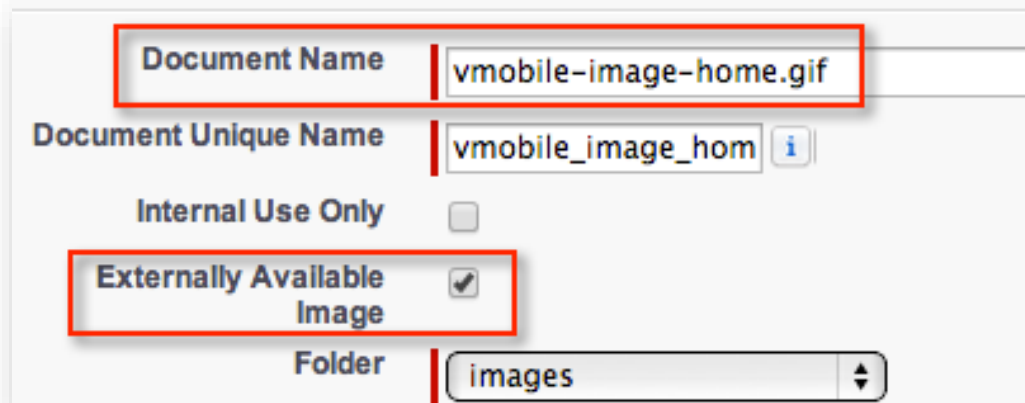
- App branding can be changed with **IPAD\_APP\_NAME** Veeva Message
- Search online for the appropriate Veeva Message to change iPad UI strings





# Home Page Image Configuration

- The login and home pages can be configured to display a custom image
- Upload and store the image into the online Documents tab with the parameters listed below
  - Recommended size is 500px by 250px



A screenshot of a web form for configuring the home page image. The form has a light gray background and a white border. It contains several fields and checkboxes. The 'Document Name' field is highlighted with a red rectangle and contains the text 'vmobile-image-home.gif'. The 'Document Unique Name' field contains 'vmobile\_image\_hom' and has an information icon to its right. The 'Internal Use Only' checkbox is unchecked. The 'Externally Available Image' checkbox is checked and is also highlighted with a red rectangle. The 'Folder' dropdown menu is set to 'images'.

Document Name	vmobile-image-home.gif
Document Unique Name	vmobile_image_hom <a href="#">i</a>
Internal Use Only	<input type="checkbox"/>
Externally Available Image	<input checked="" type="checkbox"/>
Folder	images

# Account Timeline View

- **Historical account activities can be displayed in a timeline view on the Account detail page**
  - Activity types include calls, medical events, medical inquiries, orders, etc
- **Give user profiles Read access to the Account Overview Layout object**
  - Add the corresponding marker field to the Account Overview Layout object page layout
  - For example: use `zvod_Timeline_Calls_vod` marker field to display calls
- **Activities displayed can differ based on account record types**
  - For example, HCPs can display calls, sent emails, and medical inquiries while Pharmacies can display orders and inventory monitoring



# Account Timeline View

The screenshot displays the Veeva CRM interface. On the left is a sidebar with navigation options: Edit DCR, Record a Call, Launch Media, Send Email, Email Opt In, Account Summary, View Hierarchy, Calendar, Sphere of Influence, Ratings, Addresses (2), Calls (Account) (22), Call Samples (2), Sample Order Transaction (0), Medical Inquiries (4), and Contact. The main area shows the account details for **Ackerman, Clinton Jr.**, including Name, Restricted Products (Cholecap), Middle (am), and Account Record Type (Professional). A blue callout points to a timeline icon in the top right of the account header, stating: "Tap the Timeline icon on the Account page to display the Timeline view". Below the account details, a timeline view is shown for June 2014. A blue callout over the timeline states: "4 Months of activity will be displayed within the Timeline view". The timeline lists several activities, including "Call Only - Mark Fairchild" on 6/14/2014 and 6/13/2014, and "Direct Mail: Good vs Bad Cholesterol - Sandra Schmitt" on 6/11/2014. A large blue arrow points from the bottom left of the account page towards the bottom right.

Tap the Timeline icon on the Account page to display the Timeline view

4 Months of activity will be displayed within the Timeline view



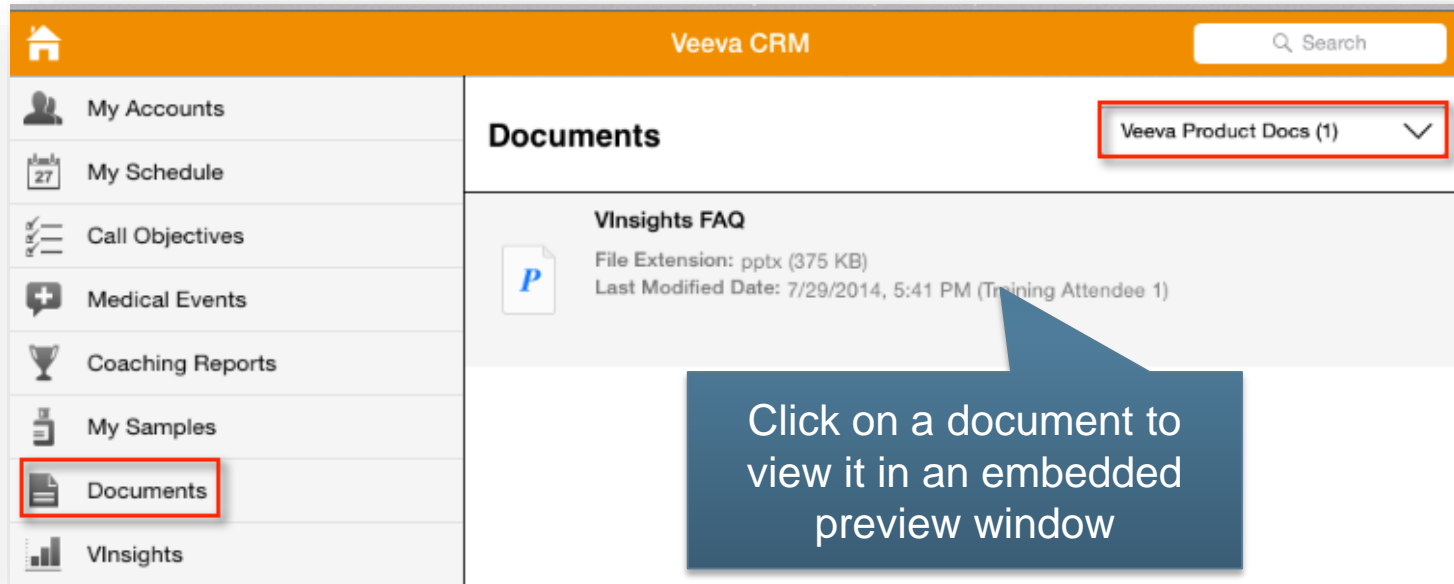
# iPad Account Record Type Icons

- **Each standard account record type has an assigned icon**
  - Use the ACCOUNT\_RECORD\_TYPE\_ICON\_MAP Veeva Message to assign an icon to a custom Account record type
- **Example: If you define a custom Account record type with a label of Staff, then update the Veeva Message with**
  - Professional\_vod:Staff
  - This would assign the Professional icon to the custom Staff Account type



# Documents and Attachments

- Documents can be viewed and stored offline
- Accessed through the Documents tab
  - Documents can be printed from the Documents tab



# Documents and Attachments

- Documents can either be downloaded during the sync process or accessed on demand
- On-Demand Model:
  - Only metadata is downloaded during sync
  - Actual file is retrieved from the server when user wants to view the file
    - iPad needs an active Internet connection
    - Upon download, file can be accessed offline without Internet connection
  - Recommended model for users with access to files of large size and/or quantity
- [Click this link for more details on how to configure the Documents On-Demand Model](#)



# Go Online

- The Go Online menu from the Home screen can navigate user directly to Veeva CRM or an external URL in a full screen embedded browser
  - Requires Internet connection
  - If pointing to Veeva CRM, automatically logs user in

- Use arrows to move through browser history
- Click **Done** to close the browser



# Menu Visibility

- Each menu item on the Home page can be configured as visible or hidden (with the exception of Options):

Tab	Tab is Visible when...
My Accounts	User has Read privileges to the <b>Account</b> object
My Schedule	User has Read privileges to the <b>Account</b> and <b>Call2_vod</b> objects
Medical Events	User has Read privileges to the <b>Medical_Event_vod</b> object
Coaching Reports	User has Read privileges to the <b>Coaching_Report_vod</b> object
My Samples	<b>ENABLE_IPAD_MYSAMPLES</b> Veeva custom setting is set to TRUE
Documents	There is at least one file available for offline viewing in a visible folder
VInsights	User has Read privileges to the <b>Sales_Transaction_vod</b> object
Go Online	Value exists in the <b>Online_Tab_URL</b> custom setting
Media	User has Read privileges to the <b>CLM_Presentation_vod</b> object
Options	Always displayed; cannot be configured



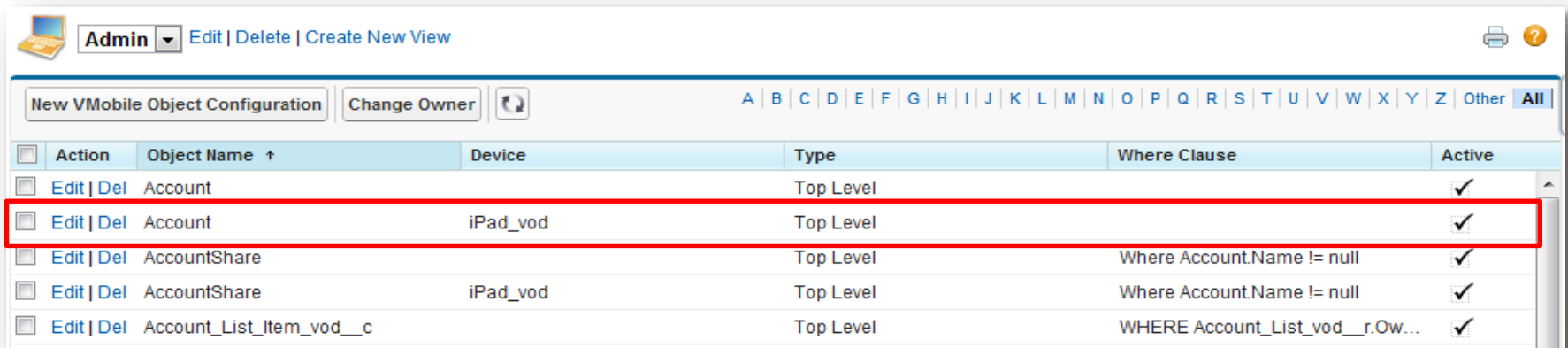


# VMobile Object Configurations (VMOC)

A stylized, light orange cloud graphic is positioned in the bottom right corner of the slide. It consists of several overlapping, rounded shapes that form a soft, billowy cloud.

# VMobile Object Configurations (VMOC)

- Use VMobile Object Configuration records to control how data is synchronized to Veeva CRM installed on offline devices such as iPad and Windows
- An active VMOC record with Device\_vod set to iPad\_vod must exist for each object utilized in Veeva CRM (iPad)
  - VMOCs exist by default for all Veeva objects but may need to be activated
- Custom objects should be related to the Account object to have its data synced automatically



Admin Edit | Delete | Create New View

New VMobile Object Configuration Change Owner

Action	Object Name ↑	Device	Type	Where Clause	Active
Edit   Del	Account		Top Level		✓
Edit   Del	Account	iPad_vod	Top Level		✓
Edit   Del	AccountShare		Top Level	Where Account.Name != null	✓
Edit   Del	AccountShare	iPad_vod	Top Level	Where Account.Name != null	✓
Edit   Del	Account_List_Item_vod__c		Top Level	WHERE Account_List_vod__r.Ow...	✓

# VMOC Types

- **Control the data synchronized for each object:**

Full Sync	Top Level	Related-to-Top-Level	Sync by profile
<ul style="list-style-type: none"><li>• Syncs all data in an object</li><li>• Reserved for reference objects e.g., Product Catalog</li></ul>	<ul style="list-style-type: none"><li>• Syncs all data in an object but allows control over whether data in related objects are also synced</li><li>• Reserved for master objects e.g., Account, Medical Event, User, Call</li></ul>	<ul style="list-style-type: none"><li>• Syncs data in detail object in a Master-Detail relationship</li><li>• E.g., Call Discussion, Call Sample</li></ul>	<ul style="list-style-type: none"><li>• Use a “Where Clause” to filter data to be synced and apply it to specific user profiles</li><li>• E.g., limit calls synchronized to the last 90 days</li></ul>

# Creating Records Offline

- **Ability to create records offline is driven by two things:**
  - User must have Create permission on the object
  - Object must have the field Mobile\_ID\_vod
- **Veeva objects already have the Mobile ID field**
  - Define it for your custom objects
- **Mobile ID must have the following configuration**
  - Text (100) (External ID) (Unique, Case Insensitive)
- **If the object does not have the Mobile ID field, then the New button will not be displayed**

General Options	
Required	<input type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input checked="" type="checkbox"/>
Default Value	



# Offline Validation Rules

A stylized, light orange cloud graphic is positioned in the bottom right corner of the slide. It consists of several overlapping, rounded shapes that form a soft, billowy cloud.

# Validation Rules – Online Issue

- **Salesforce.com validation rules are only enforced upon save while using the online application**
  - Not enforced offline on CRM (iRep) until after synchronization

**Errors**

Object	Type	Operation	Error
New	Call2_vod__c	Create	When company sponsored study = true then enter study.

Synch errors displays after synching and then needs to be fixed

# Offline Validation Rules

- Enable validation rules in most objects to be enforced offline immediately upon save, submit, and sign
  - Eliminates synch errors while enforcing crucial business rules offline
- [Click this link for a list of Veeva objects that currently support offline validation rules](#)

The screenshot displays the 'Call Report' form in Veeva. The form is titled 'Call Report' and has a 'Cancel' button. It contains a table with the following fields:

Professional Information	
Account	Clinton Ackerman
Credentials	
Address	967 Millbrook Rd, Newton, NJ 07860
Sample Card #	
Record Type	Call Report
Medical Event	
Company Sponsored Study	<input checked="" type="checkbox"/>

A tooltip message is displayed: "When company sponsored study = true then enter study." A yellow warning icon is visible next to the 'Call Conflict Status' field. A red box highlights the 'Company Sponsored Study' checkbox, which is checked.

# Offline Validation Rules Configuration

- **Configure access to fields and objects supporting Offline Validation Rules as shown below:**

Object	Field	Admin Profile	User Profile
Rule_Object_Header_vod	All	CRUD	R
Rule_Definition_vod	All	CRUD	R
Rule Message_Translation_vod	All	CRUD	R
User	Profile_Name_vod		
VMOC			
Rule_Object_Header_vod		N/A	Active
Rule_Definition_vod		N/A	Active
Rule Message_Translation_vod		N/A	Active

- **Give Admin and User profiles access to the record type in each of 3 objects**





# Offline Validation Rules Configuration

- **Give the Admin profile access to:**
  - Validation Rule Admin (Validation\_Rule\_Admin\_vod) VisualForce Tab
  - Validation\_Rule\_Console\_vod VisualForce Page
- **Go to the Validation Rule Admin tab and click the Refresh Validation Rule Data button**
  - Synchronizes the validation rules metadata into the rules related objects
- **Synchronize from offline (iPad or Windows)**
  - Test to make sure the validation rules are being enforced offline



# Offline Validation Rules - Sync

## ■ **Formula Fields**

- Formula fields can be defined online, but they do not execute immediately on the iPad
- These will execute after a sync has occurred

## ■ **Workflows**

- Workflows that have been enabled online will only start after the iPad data syncs and hits the server

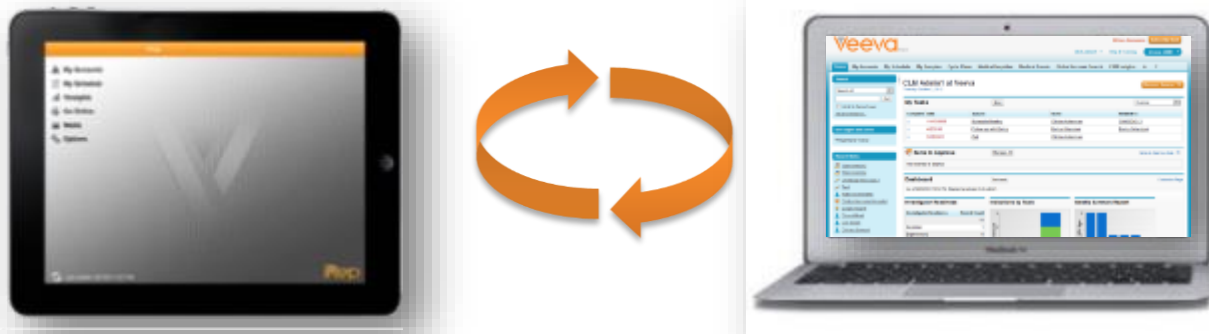


# Synchronization



# Synchronization

- Users should sync daily to ensure up-to-date data and content are always available



- What gets synchronized?
  - Data and media are synchronized during the same session
    - Data will sync first, then media
    - Any new CLM content available at the time of synchronization will be automatically downloaded
  - Submitted Calls and Medical Inquiries are synchronized immediately when the device detects a network connection

# Synchronization Conflicts

- What if the same record has been updated online and offline?



**For any object other than calls, online data will win**

- Server is the system of records
- If you sync a record that was modified online, you will get a 'Data has been modified' sync error

**For calls, offline data will win**

- The most vital information for a call (samples, signature) is primarily captured offline, so we need to make sure this data is not lost

# Synchronization Interruption

- What happens if an iPad sync is interrupted before it can be completed?



**If sync is interrupted by the user switching to another app**

- Then sync is paused and can continue from where it stopped when the user returns to Veeva CRM on the iPad

**If the sync is cancelled by the user or the iPad loses connectivity during sync**

- Then next time it will restart from the beginning
- To ensure integrity across all objects in the database, e.g., what if we completed the Account sync but not yet downloaded Addresses?

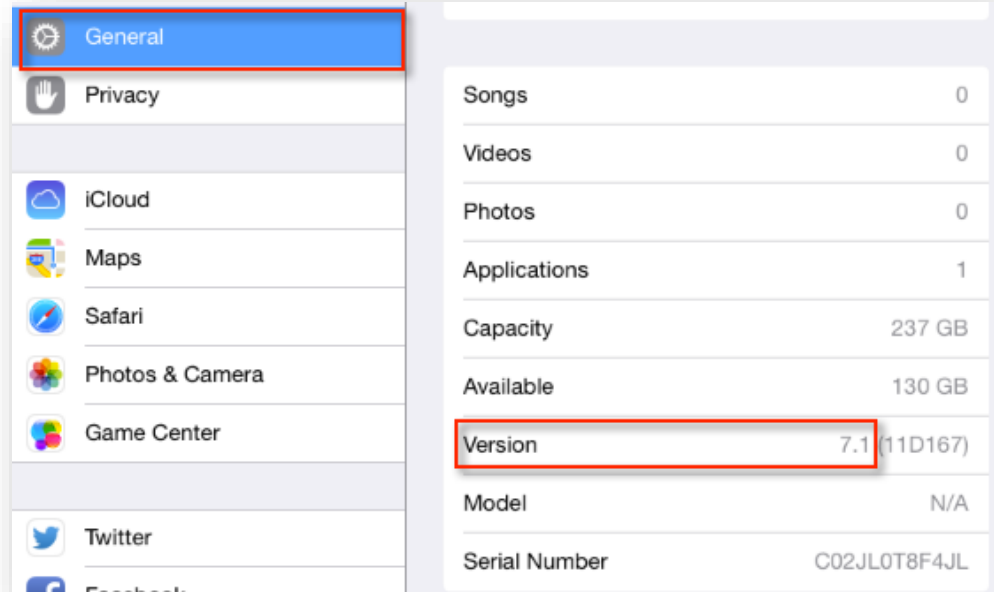
# Synchronization Tracking

- Veeva keeps track of all user synchronization activity in the Synchronization Tracking object
- Best practice: Report on user sync activity to see who has and has not synchronized
  - Grant user profiles Create permissions on the Synchronization Tracking object
  - Create a custom report type of Users with Synchronization Tracking
  - Create a Report using the custom report type

Full Name <small>Joe Tsimberg</small>	Phone	Sync Start Datetime	Sync Completed Datetime	Successful Sync	Media Processed <small>↑</small>	VInsights Processed
<a href="#">Monty Livingston</a>	-	5/17/2012 11:43 AM	5/17/2012 11:44 AM	1	✓	✓
<a href="#">Joe Slade</a>	-	5/17/2012 12:44 PM	5/17/2012 12:45 PM	1	✓	✓
<a href="#">Joe Slade</a>	-	5/17/2012 11:38 AM	5/17/2012 11:40 AM	1	✓	✓
<a href="#">Chad Stout</a>	-	5/17/2012 1:48 PM	5/17/2012 1:49 PM	1	✓	✓
<a href="#">Konstantine Tsimberg</a>	-	5/18/2012 7:21 AM	5/18/2012 7:22 AM	1	✓	✓

# iOS Supported Versions

- iPad 1 is not supported
- Veeva supports the current iOS version plus two n.n previous versions
- Users will see a warning during CRM (iPad) login if their iPad is running an unsupported iOS version
- [Click this link for more details on iOS versions support](#)





# Module Summary

- **Discussed common offline configuration including**
  - Installation
  - Home Page
  - Offline Documents
  - Menus visibility
  - VMobile Object Configurations (VMOC)
  - Offline Validation Rules
  - Synchronization



# Labs

No labs

For more information,  
see Appendix

# Appendix

Closed-Loop Marketing



# Veeva CRM (iPad) Closed Loop Marketing (CLM)

# What is CLM?

- Veeva's CLM (closed loop marketing) is an enterprise-scalable solution built into Veeva CRM (iPad) to deliver the ultimate end user experience with enhanced customer interaction and reporting capabilities

- No integration
- Highly interactive content
- Offline...and connected
- Improved compliance
- No proprietary content creation tools
- Real-time expert
- User efficiency



# iPad Brings CLM to Life



# CLM Integration with Vault PromoMats

- **Veeva CRM can be integrated with Veeva Vault PromoMats**
  - Allows CLM content review and approval process to be managed using the Vault PromoMats application
  - Streamlines and simplifies the CLM content creation process
- **CLM presentations content can be defined, reviewed, and approved in Veeva Vault and then pulled to Veeva CRM**



# View CLM Content

- Users can present media to a customer
- Only media content that users have access to and are specified for the product will be displayed

The screenshot displays the Veeva CLM interface. On the left is a sidebar with a 'Navigator' header and a search bar. Below the header, there are sections for 'Account Type' (Business Accounts, Person Accounts) and 'Views' (All Accounts, Hospital Departments, Hospitals, My Accounts). The main content area is titled 'My Accounts' and lists two accounts: 'A Center For Dermatology' and 'Ackerman, Clinton'. For each account, there is an icon, name, address, and phone number. To the right of each account entry is an actions menu with buttons for 'New Call', 'Launch Media', and 'Send Email'. A blue callout box with a white arrow points to the 'Launch Media' button, with the text 'Tap the actions button and then tap the **Launch Media** menu'.

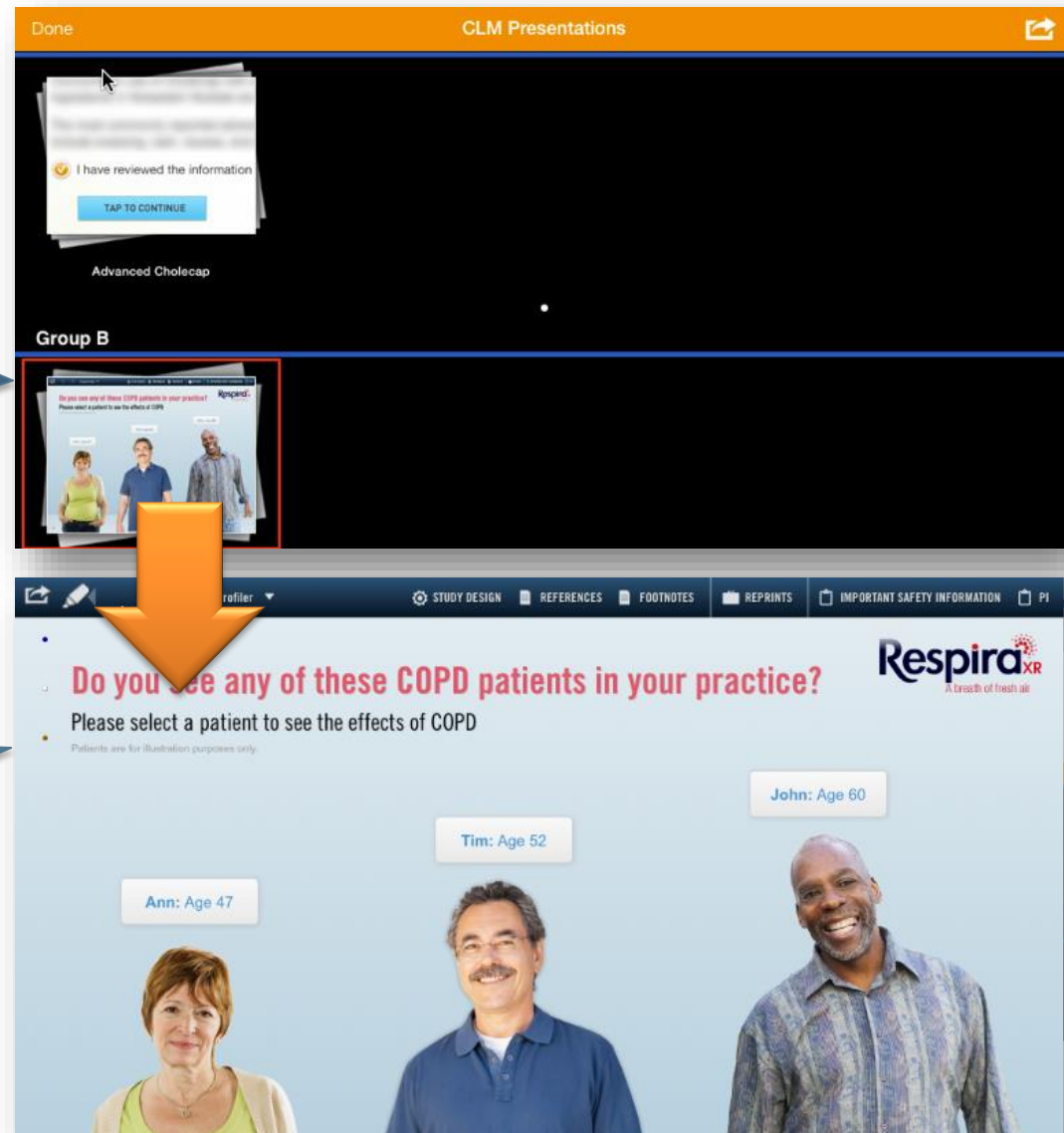
Account Type	My Accounts
Business Accounts ✓	<b>A Center For Dermatology</b> 39 Newton Sparta Rd Newton, NJ 07860 (973) 383-7979
Person Accounts ✓	<b>Ackerman, Clinton</b> 967 Millbrook Rd Newton, NJ 07860



# Select Presentation

Select a CLM presentation from the list of available presentations based on what the users have access to

The first slide in the presentation displays



# Navigate CLM Presentation



# Display Account Information with HTML5

- **Personalized information can be included around CLM content**

Content appears as if it is tailored for each doctor



# Capture Customer Data

- Customer's reaction and survey responses can be captured and recorded on the call report and account profile

Click to indicate a positive (blue), neutral (white), or negative (orange) response

The screenshot shows a survey question: "What's your preferred statin, Dr. Michael R Aaron?". Below the question are four options, each with a pill image: Provastatin (blue pill), Juvastatin (orange pill), Zostatin (green pill), and CholeCap (orange pill). The Zostatin option is highlighted with a red box. A red box also highlights a legend in the top left corner showing three colored dots: blue, white, and orange. A blue callout box points to the Zostatin option with the text "Click to capture customer's survey response".

What's your preferred statin, Dr. Michael R Aaron?

Provastatin Juvastatin Zostatin CholeCap

Click to capture customer's survey response

# Capture Survey Response

- CLM Presentations survey responses can be captured and stored in the Veeva database in the following objects
  - Account, Question Response, Call Clickstream

The screenshot displays the Veeva Navigator interface for an account profile. The left sidebar contains navigation options: Edit, Record a Call, Launch Media, Send Email, Email Opt In, Account Summary, Calendar, Sphere of Influence, Addresses (2), and Survey Targets (7). The main content area shows the profile for **Ackerman, Clinton**. The profile details are organized into a table-like structure:

Name	Clinton Ackerman	Account Identifier	
Middle	J	Credentials	
Suffix		Specialty	Respiratory Therapist
Preferred Name		Specialty 2	Cardiology
Gender		Account Record Type	HCP
Segmentations		Restricted Products	
Preferred Statin	CholeCap	Approved Email Consent	Explicit Opt In
Language		Territory	View

A callout box with a blue background and white text points to the 'Preferred Statin' field, stating: "Survey response is captured on the account profile".

# Capture Customer Reaction

iOS Simulator – iPad / iOS 7.0.3 (11B508)

Cancel Call Report PromoMats Sign

**Detailing Priority**

1. Cholecap ☐ Cardiocap ☐ Cert Product  
☒ Cholecap ☐ Respira  
☐ Restolar ☐ Supemra

**Call Discussions** +

**Samples and Promotional Materials**

Sample +

Promotional Items +

**CLM Details**

–	Advanced Cholecap	Cholecap	Safety	Advanced Safety	Positive
–	Advanced Cholecap	Cholecap	Intro Page	Splash Page	Positive
–	Advanced Cholecap	Cholecap	Surveys	Surveys	Positive
–	Advanced Cholecap	Cholecap	Dynamic Polls	Dynamic Polls	Neutral

Reactions are captured on the call report for each slide

# Submit Call

- Users can submit the call report when finished recording
- Submitted calls are automatically synced when Internet connection is detected

The screenshot shows the 'Call Report' interface. A blue callout box with a white arrow points to the 'Submit' button, which is highlighted with a red border. The interface includes sections for 'Detailing Priority', 'Call Discussion', 'Samples and Promotional Materials', and 'CLM Details'.

**Call Report**

Cancel PromoMats Sign

**Detailing Priority**

1. Cholecap

**Call Discussion**

**Samples and Promotional Materials**

Sample +

Promotional Items +

**CLM Details**

Advanced Cholecap	Cholecap	Safety	Advanced Safety	Positive
Advanced Cholecap	Cholecap	Intro Page	Splash Page	Positive

Buttons: Save, Submit, Delete, New Medical Inquiry, Send Email