



# Sandbox Management

Veeva Professional Services

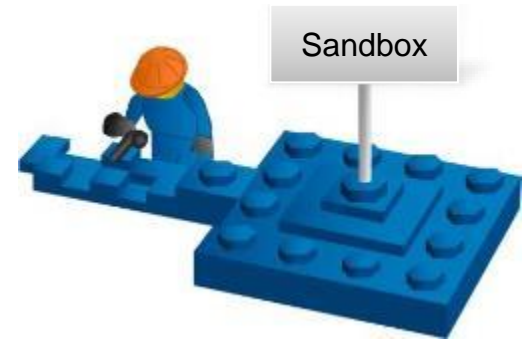
# Module Objectives

- **Describe the need for sandboxes**
- **Define the different types of sandboxes**
- **Veeva-tize a Developer Pro or Developer sandbox**



# Sandbox

- **Salesforce.com gives you the ability to create multiple copies of your organization in separate environments without compromising your production organization**
- **Serves a variety of purposes**
  - Development
  - User Acceptance Testing (UAT)
  - Training
- **3 sandbox types: Full, Developer Pro, and Developer**



All configuration should be executed, reviewed, and fully tested in Sandbox before migrating to Production!

# Sandbox Comparison

	Full	Developer Pro	Developer
# per org	1	5	15
Size of data	Same as Production	1GB (Winter 14)	200MB (Winter 14)
Purpose	UAT & training	Configuration & customization	Coding by single developer
Copies from Production	Everything – including data, standard and custom object records, documents, and attachments	<b>Includes:</b> All metadata, reports, dashboards, apps, and customizations under Setup menu  <b>Excludes:</b> All standard and custom object records, business data, documents, and attachments e.g., Veeva Messages, Products, Account Plans	
SFDC IDs	Same as Production	New ID generated when creating new records	
Can be refreshed	Every 29 days from previous refresh	Once a day	



# Creating a Sandbox

- To create a sandbox:

- Setup → Data Management → Sandbox

- Full sandboxes creation may take up to 3 days

**Sandbox Information** ■ = Required

**Name**

Config

**Description**

Use for configuring new functionality.

**Sandbox License**

Developer	Developer Pro	Partial Copy	Full
Refresh Interval: 1 Day	Refresh Interval: 1 Day	Refresh Interval: 5 Days	Refresh Interval: 29 Days
Capacity: 200 MB	Capacity: 1 GB	Capacity: 5 GB	Capacity: Same as Source

# Sandbox Login

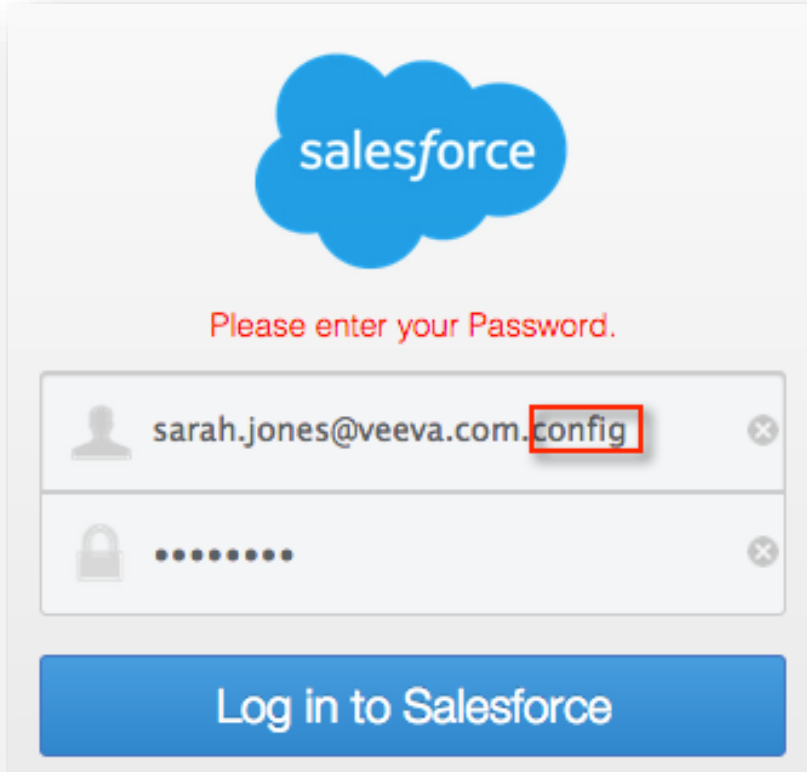
- To login to a sandbox from the Configuration Console:

- Setup → Data Management → Sandbox
- Click the Login link next to the sandbox name

Sandboxes					
Sandbox Templates					
Sandbox History					
New Sandbox					
Action	Name	Type	Status	Location	Current Org Id
Edit   Del   Refresh   Login	<u>Config</u>	Developer Pro	Completed	CS17	00Dg0000006RhJb
Edit   Login	<u>Full</u>	Full	Completed	CS17	00Dg0000006RhKu

# Sandbox Login

- To login from the standard login page:
  - <https://test.salesforce.com>
  - Append user name with the name of the sandbox
  - Password is the same as in production org

A screenshot of the Salesforce login interface. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo is a red error message: "Please enter your Password." There are two input fields: the first is for the username, containing "sarah.jones@veeva.com.config" with a red box around the ".config" part; the second is for the password, shown as a series of dots. Both fields have a small 'x' icon to clear the input. At the bottom is a large blue button with the text "Log in to Salesforce".

salesforce

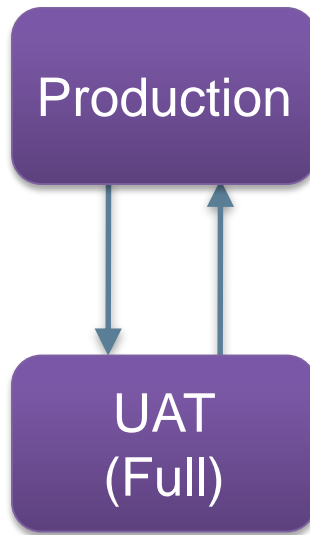
Please enter your Password.

sarah.jones@veeva.com.config

.....

Log in to Salesforce

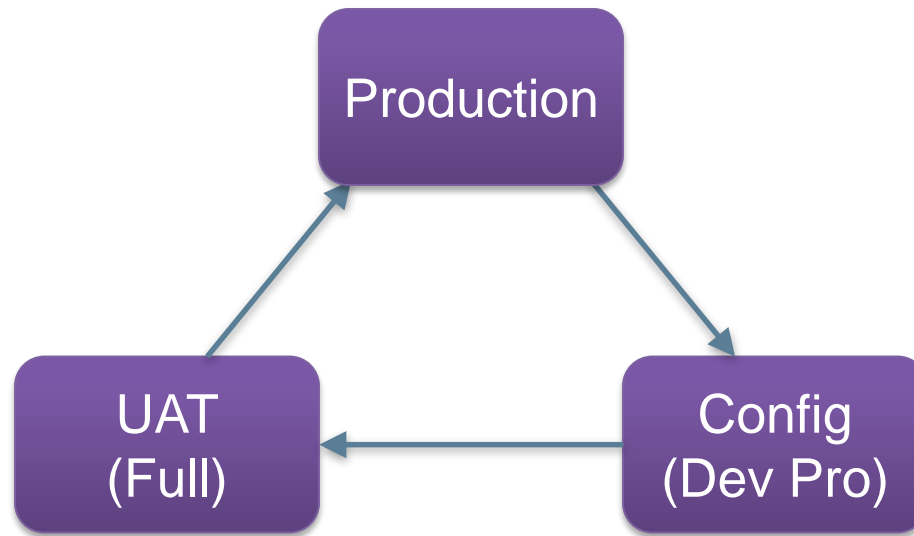
# Environment Management



**One size does not fit all**

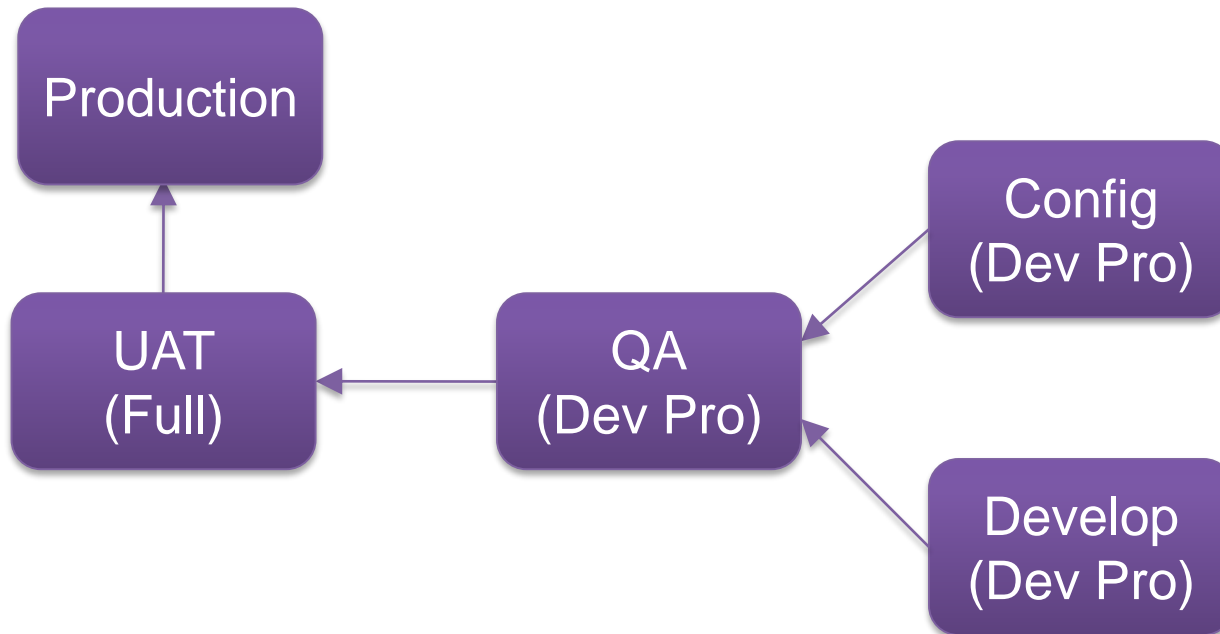


# Environment Management



**One size does not fit all**

# Environment Management



**One size does not fit all**

# Define Environment Strategy (Example)

## Production

- Perform application configuration in production org until testing begins
- Once testing begins, production must be “sterilized”

## Full Sandbox

- Integration development
- Use for data included in UAT
- Validation
- End user training

## Developer Pro and Developer Sandboxes

- Q/A and Testing
- Prototyping
- New Enhancements

# Sandbox – Configuration Migration

## Tools to migrate configuration between environments

### Eclipse with Force.com IDE plug-in

- Migrates metadata between environments
- Fields, page layouts, record types, user profiles, etc.
- Can migrate from an org to any other org
- **Details will be discussed later in the training**

### Change Sets

- Migrates metadata between environment
- Fields, page layouts, record types, user profiles, ect...
- Can only be migrated between “related” orgs
- **Details will be discussed later in the training**

### Apex Data Loader

- Migrates data between environments
- Business data (Accounts, Addresses, and Affiliations)
- Application setup data (Custom Settings, Veeva Messages, and Product Catalog)

# “Veeva-tizing” a Sandbox

Developer Pro and Developer  
Sandboxes

# Sandboxes - No Veeva Messages

- **Absence of Veeva Messages will result in null values where Veeva Messages are used**
  - My Accounts
  - My Schedule
  - My Samples
  - My Setup

The screenshot displays the Veeva VMS user interface. The top navigation bar includes links for Home, My Accounts (highlighted), My Schedule, Clear VOD Cache, My Samples, Cycle Plans, Medical Inquiries, Medical Events, and Global Account Search. On the left, there is a search sidebar with a Google search bar and a search section containing a search input field, a 'Go!' button, and a 'Limit to items I own' checkbox. The main content area shows the 'My Accounts' section. It features a header with a 'Google' button and a 'Google' input field. Below this, there is a 'Search' section with a 'Search All' dropdown, a search input field, and a 'Go!' button. The main content area displays a list of accounts. The first account is highlighted in red and shows 'null' values for the 'Name' and 'Address' fields. The 'Address' field is a dropdown menu with 'Corp' selected. Below the list, there is a 'More Actions' dropdown menu. The bottom of the page shows a pagination bar with 'null' and a dropdown menu.

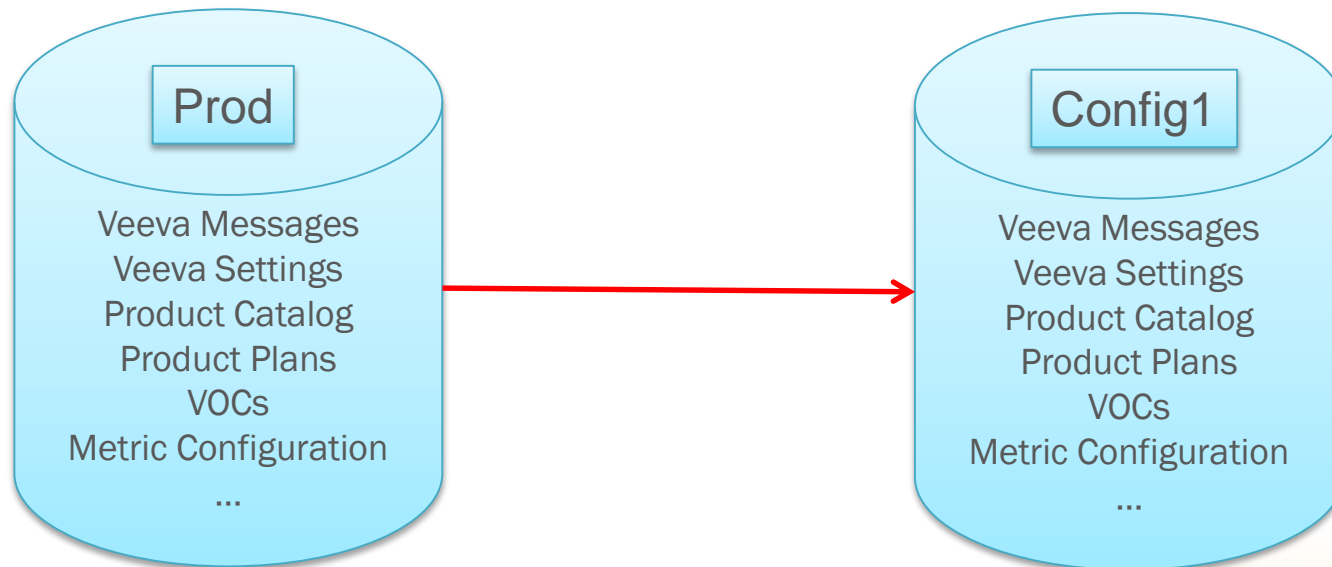
# Sandbox - No Custom Settings

- **Absence of Custom Settings causes Veeva functionality to be unavailable both online and offline**
  - My Schedule
  - New Account Wizard

The screenshot displays the Veeva system's 'My Schedule' page. The top navigation bar includes links for Home, My Accounts, My Schedule (active), Clear VOD Cache, My Samples, Cycle Plans, Medical Inquiries, Medical Events, and Global Account Search. On the left sidebar, there are sections for Google search, a general Search bar with a 'Go!' button and a 'Limit to items I own' checkbox, and a Messages and Alerts section with a 'Welcome to Veeva!' message. The main content area shows a user profile with a 'null' name and a 'null: 0' status. Below this, a calendar view for October 2012 is shown, with dates from Sunday, October 14, to Thursday, October 18, 2012. Each date has a dropdown arrow and a plus sign. The calendar cells contain 'null' values, indicating that no data is available due to the lack of custom settings.

# “Veeva-tizing” a Sandbox

- Veeva-tizing is the process of data loading the out-of-box and custom Veeva application data into a Developer Pro or Developer sandbox to support Veeva specific functionality
- Export application data from a source org such as the production org and load it into a target sandbox





# Objects to Data Load

- **Load the following objects to enable Veeva application functionality in a Developer Pro or Developer sandbox**

## **Must:**

Veeva Messages

Custom Settings (Veeva, Common, Concur, GAS)

Product Catalog

My Setup

Views

Preferences

VMobile Object Configurations

## **If Using:**

Product Metrics

Metric Configurations

Key Messages

Product Plans

Product Strategies

Product Tactics

VInsights (only for Full Copy Sandboxes, if any)



# Use External IDs

- **Use External ID whenever possible**
  - Populate External ID values in the source and target orgs for all objects
- **Makes moving application data to various environments less laborious**
  - A .csv file containing products with External IDs of parent products' relationships can be used to upsert the products into various target environments
  - No need to change referenced IDs to resolve relationships



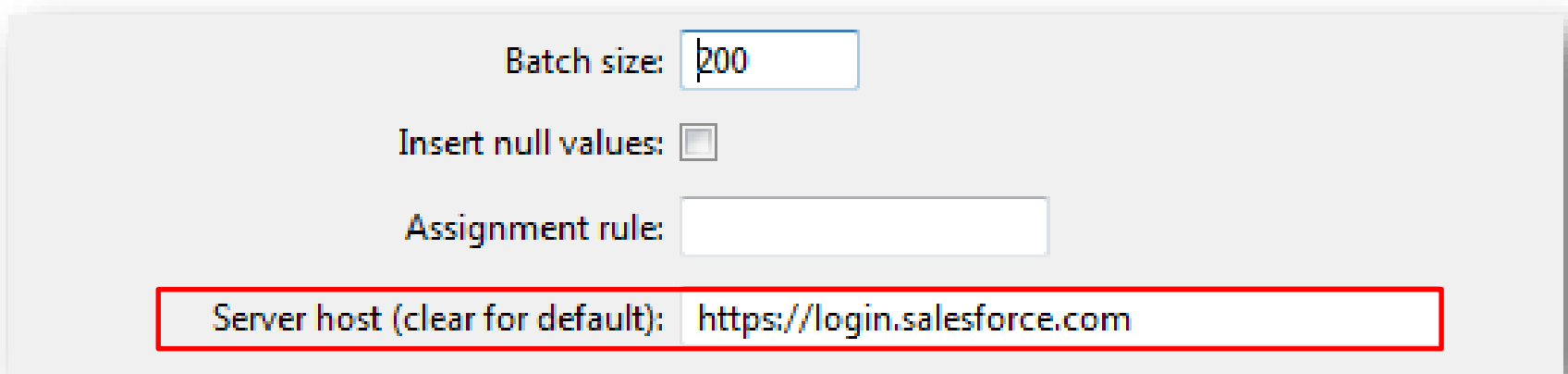
# Extract Related Data with External IDs

- **When exporting data containing parent or lookup relationships:**
  - Replace SFDC IDs with External IDs
  - Export the External IDs of the referenced records and not the SFDC IDs
- **For example, when exporting products from the Product Catalog:**
  - Replace Parent\_Product\_vod\_\_c with Parent\_Product\_vod\_\_r.External\_ID\_vod\_\_c
- **Do the same when exporting Preferences and make sure Views have External ID values**



# Apex Data Loader

- If connecting to Production, Server host must read:
  - <https://login.salesforce.com>
- If connecting to a Sandbox, Server host must read:
  - <https://test.salesforce.com>



The screenshot shows the configuration interface for the Apex Data Loader. It includes the following fields:

- Batch size:** A text input field containing the value "200".
- Insert null values:** A checkbox that is currently unchecked.
- Assignment rule:** An empty text input field.
- Server host (clear for default):** A text input field containing the value "https://login.salesforce.com". This field is highlighted with a red border.

- When upserting data, never map the Id and Owner Id fields



# Module Summary

- Described the need for sandboxes
- Defined the different types of sandboxes
- Veeva-tized a Developer Pro / Developer sandbox



# Lab – Setup a Developer Pro Sandbox

Create a Developer Pro Sandbox

Export Admin Data from Production Environment

Upsert Admin Data into a Developer Pro Sandbox

# Appendix

Best Practices



# Sandbox and Environment Best Practices

- **Provision only as many as needed**
- **Set Process for “Expiration” of environment to recycle it**
- **Develop Regular Refresh and Retirement Process**
- **Do not refresh a sandbox that has been updated by Veeva prior to production being updated**
  - Refreshing a Sandbox that has been updated to a new release before Production has been updated will cause the Sandbox to revert to the old Veeva version





# Sandbox and Environment Best Practices

- **Match Environment Type to best use of that Environment**
- **Build in sandbox first, not in production**
- **De-activate non-essential users, monitor login history and set-up audit trail**
- **Other items to know**
  - Email items like reports, dashboards etc...
  - Creating full Sandbox can take several days
  - Separate patch and release structure from SFDC production environments



# Appendix

Force.com API: Advanced Topics



# API

- **Salesforce.com provides programmatic access to your organization's information using a simple, powerful, and secure Application Programming Interface (API), the force.com Web Services API**
- **Force.com API has more than 20 pre-defined calls/methods**
- **The SOAP-based API is used to create, retrieve, update or delete records, such as accounts, calls, and custom objects for real time client applications that update small amounts of information**
- **The Rest Based Bulk API is optimized for loading large sets of data. It allows you to insert, update, or upsert a large number of records asynchronously by submitting a number of batches which are processed in the background by Salesforce.com**



# API

- **Customers looking to build integrations with external applications should leverage the Enterprise WSDL**
- **The force.com Web Service Description Language (WSDL) can be accessed from:**
  - Setup → Develop → API

