



Veeva Functionality Part 2

Veeva Professional Services

Module Objectives

- **Configure Veeva Functionality including:**
 - Medical Inquiries
 - Medical Events
- **Provide an overview of:**
 - Surveys
- **View Medical Inquiries, Medical Events, and Surveys on iPad**



Medical Inquiry Request Forms (MIRFs)



Medical Inquiry Request Forms (MIRFs)

What is a Medical Inquiry?

- An off-label question or unsolicited request for off-label information by an HCP (health care professional)
- By law, users may not promote off-label so they have to submit a MIRF

What is a MIRF?

- Electronic form in Veeva to document off-label request and submit to appropriate channels to fulfill the request
- Configured to ensure full compliance with applicable laws and regulations concerning off-label information



Medical Inquiry Request Forms (MIRFs)

- **Stored in the Medical Inquiry object**
 - Lookup relationship to the Account object
- **Standard information generally captured**
 - Created from Account or Call Page

Medical Inquiry		Edit	Delete	Clone
▼ Information				
Medical Inquiry Id	MI-00004	Status	Saved	
Account	Melany Segnit	Disclaimer	Enter Disclaimer Text Here.	
▼ Inquiry Information				
Product	Cholecap			
Delivery Method	Urgent Mail			
Address	555 First Avenue, New York, NY 10016 us			
Email	msegnit@nyucenter.org			
Fax				
Phone	(212) 555-5555			
Rush Delivery	<input type="checkbox"/>			
Inquiry Text	Can Cholecap be taken with pain killers?			
▼ Signature				
Signature Date				
System Information				
Created By	Training Attendee 1 , 2/7/2016 11:07 AM		Last Modified By	Training Attendee 1 , 2/7/2016 11:07 AM
		Edit	Delete	Clone

MIRFs – Delivery Methods

- **Delivery_Method_vod picklist allows users to select the response method**
 - Depending on this selection a filtered picklist is displayed allowing the user to select the address, email, phone or fax #
 - Available values are pulled from the Account selected for the Medical Inquiry

Account Enrico Orlandoni

Disclaimer Enter Disclaimer Text Here.

Delivery Method Mail ▼

Address 174 Edison Rd, Lake Hopatcong, NJ 07849 ▼

Ship to New Address --None--

Address Line 1 33 Newton Sparta Rd, Newton, NJ 07860

Address Line 2 123 Main St, Moscow, AL

City 174 Edison Rd, Lake Hopatcong, NJ 07849

Account Enrico Orlandoni

Disclaimer Enter Disclaimer Text Here.

Delivery Method Phone ▼

Phone --None-- ▼

New Phone Number --None--

Phone Number (973) 555-1212

(973) 383-2971

(973) 663-1300

MIRFs – Delivery Methods

- Delivery Method picklist values labels can be modified using the Translation Workbench
- Use the following section signals to enable users to select address, email, phone or fax number as the primary delivery method:
 - --ana: Add New Address
 - --ane: Add New Email
 - --anf: Add New Fax
 - --anp: Add New Phone

New Phone Number	<input checked="" type="checkbox"/>
Phone Number	<input type="text" value="415-555-5555"/>

MIRFs – Optional Delivery Methods

- **Allow users to select more than one delivery method**
 - Ex: Select both mail to a specific address and an email
- **Additional delivery methods are optional**
- **Use the following section signals to enable users to select an optional delivery:**
 - --eom: To specify mail/urgent mail as optional delivery method
 - --eop: To specify phone as optional delivery method
 - --eof: To specify fax as optional delivery method
 - --eoe: To specify email as optional delivery method



MIRFs – Setup

■ Medical Inquiry Disclaimer

- Add Disclaimer field (zvod_disclaimer_vod) to Medical Inquiry page layout
- Use the DISCLAIMER Veeva Message to edit the disclaimer text

■ Require a signature

- Add the Signature Date field on the Medical Inquiry page layout
- Use the MEDICAL_INQUIRY:SIGNATURE_REQUIRED Veeva Message to edit the error message

Signature

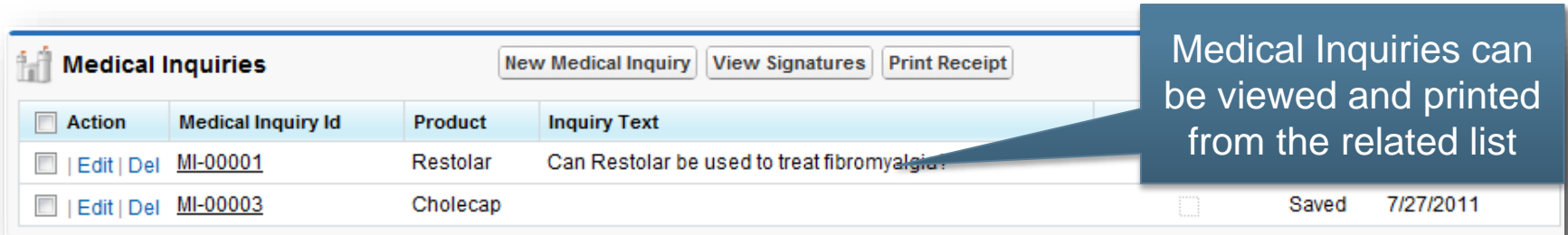
Signature Date

Disclaimer

Enter Disclaimer Text Here.

MIRFs – Setup

- Medical Inquiry related list should be placed on account page layouts



The screenshot displays the 'Medical Inquiries' section of a software interface. At the top, there are three buttons: 'New Medical Inquiry', 'View Signatures', and 'Print Receipt'. Below these is a table with the following columns: 'Action', 'Medical Inquiry Id', 'Product', and 'Inquiry Text'. The table contains two rows of data. The first row has an 'Action' column with 'Edit' and 'Del' links, a 'Medical Inquiry Id' of 'MI-00001', a 'Product' of 'Restolar', and an 'Inquiry Text' of 'Can Restolar be used to treat fibromyalgia?'. The second row has an 'Action' column with 'Edit' and 'Del' links, a 'Medical Inquiry Id' of 'MI-00003', and a 'Product' of 'Cholecap'. To the right of the table, there is a status bar with a checkbox, the word 'Saved', and the date '7/27/2011'. A blue callout box with a pointer to the first row contains the text: 'Medical Inquiries can be viewed and printed from the related list'.

Action	Medical Inquiry Id	Product	Inquiry Text
Edit Del	MI-00001	Restolar	Can Restolar be used to treat fibromyalgia?
Edit Del	MI-00003	Cholecap	

Medical Inquiries can be viewed and printed from the related list

Saved 7/27/2011

- An integration or a workflow process can be implemented to send the Medical Inquiries to the appropriate recipients for fulfillment
 - Commonly sent to MSLs

Medical Inquiry from Call Report

- Medical Inquires can be created directly from a Call Report

The screenshot displays the Veeva system interface for creating a medical inquiry from a call report. The main window is titled 'Call Report' and 'New Call Report'. It includes a 'Professional Information' section with fields for Account (Melany Segnit), Credentials (MD), Address (555 First Avenue, New York, NY 10016), and Sample Card #. A 'More Actions' dropdown menu is visible, with 'New... Medical Inquiry' selected. A red arrow points from this menu to a 'Medical Inquiry' modal window. The modal window has a title bar with 'Save', 'Submit', and 'Cancel' buttons. It contains an 'Information' section with fields for Medical Inquiry Id, Delivery Method (Urgent Mzi), Address (555 First Avenue, New York, NY 10016 us), Ship to New Address, Address Line 1, Address Line 2, City, State (None), Zip, Country (None), Email (msegnit@nyucenter.org), Fax (None), Phone ((212) 666-6665), and Account (Melany Segnit). It also includes a 'Product' dropdown (Cholecap), a 'Status' dropdown (Saved), and a 'Rush Delivery' checkbox (checked). A 'Disclaimer' link is present. The 'Inquiry Information' section at the bottom has an 'Inquiry Text' field containing 'Can Cholecap be taken with XYZ?'. A 'Save' button is located at the bottom right of the modal window.

Call Report
New Call Report
<< My Schedule

Call Report [Save] [Save & New] [Submit] [Cancel] [More Actions ▼]

Professional Information

Account Melany Segnit

Credentials MD

Address 555 First Avenue, New York, NY 10016

Sample Card #

Date/time 1/28/2013

New...
Medical Inquiry

Medical Inquiry [Save] [Submit] [Cancel]

Information

Medical Inquiry Id

Delivery Method Urgent Mzi

Address 555 First Avenue, New York, NY 10016 us

Ship to New Address

Address Line 1

Address Line 2

City

State None

Zip

Country None

Email msegnit@nyucenter.org

Fax None

Phone (212) 666-6665

Account Melany Segnit

Product Cholecap

Status Saved

Rush Delivery ☒

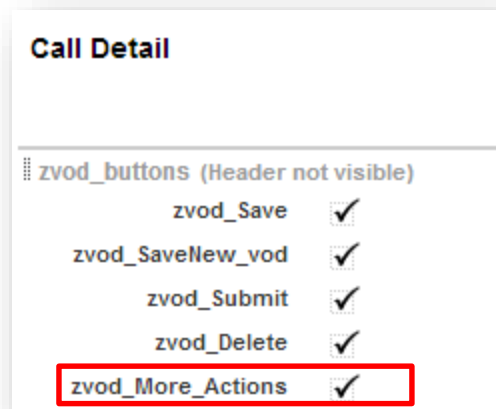
Disclaimer [Enter Disclaimer Text Here](#)

Inquiry Information

Inquiry Text Can Cholecap be taken with XYZ?

Medical Inquiry from Call Report

- **To enable the ability to create Medical Inquiries from Call Reports**
 - Give user profiles create permission on the Medical Inquiry object
 - Place the Medical Inquiry related list on the account page layout(s)
 - Add the the `zvod_More_Actions_vod` marker field to the `zvod_buttons` section of the Call page layout



Medical Inquiry Multiple Questions

- Instead of creating a separate Medical Inquiry per product, users can create one Medical Inquiry for multiple products
- Each question/product/delivery method becomes a section of the Medical Inquiry
 - Generates 1 Medical Inquiry record per section after submitting
- Capture one signature

The screenshot displays a web-based medical inquiry form with two distinct sections, each for a different product. Each section includes fields for delivery method, address, contact information, and a specific inquiry question.

Section 1: Cholecap

- Product:** Cholecap
- Delivery Method:** Urgent Mail
- Address:** 33 Newton Sparta Rd, Newton, NJ 07860
- Ship to New Address:** ☐
- Address Line 1:**
- Address Line 2:**
- City:**
- State:** --None--
- Zip:**
- Country:** --None--
- Email:** enrico@aol.com
- Fax:** --None--
- Phone:** --None--
- Rush Delivery:** ☒
- Inquiry Text:** What of the risks of taking Cholecap if you're diabetic?

Section 2: Labrinone

- Product:** Labrinone
- Delivery Method:** Email
- Email:** enrico@aol.com
- Send to New Email:** ☐
- E-mail:**
- Fax:** --None--
- Phone:** --None--
- Address:** --None--
- Rush Delivery:** ☐
- Inquiry Text:** Can Labrinone be taken with Kykex?

Multiple Products Configuration

Add the --mpi section signal to the Medical Inquiry page layout

Add/move the necessary fields to the section containing the --mpi section signal




Give user profiles access to the Group_Identifier_vod field on the Medical Inquiry object

Medical Events



Medical Events

- Medical Events is an object used to manage events such as
 - Lunch meetings
 - Seminars

 Medical Event

NJ Oncology Seminar

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[« Back to List: Cycle Plans](#)

[Event Attendees \[5+\]](#) | [Calls \[0\]](#) | [Call Discussions \[0\]](#) | [Open Activities \[0\]](#) | [Approval History \[0\]](#) | [Notes & Attachments \[0\]](#)

Medical Event Detail

[Edit](#) [Delete](#) [Record a Call](#) [Manage Attendees](#) [View Signatures](#)

Event Name	NJ Oncology Seminar	Active	<input checked="" type="checkbox"/>
Start Date	9/16/2013	Event Type	Education
End Date	9/18/2013	Website	http://www.njoncsem.com
Location	Westin Governor Morristown, NJ	Account	Chilton Memorial Hospital
Description	Created for training.	Address	250 West 19th Street

▼ Event Expenses

Submit Expense	<input type="checkbox"/>	Expense Post Status	
Expense Amount		Expense System External ID	

▼ Product Information

Primary Product	Restolar	Secondary Product	Cholecap
Created By	Sarah Jones , 10/6/2014 9:25 AM	Last Modified By	Training Attendee 1 , 10/6/2014 9:25 AM

[Edit](#) [Delete](#) [Record a Call](#) [Manage Attendees](#) [View Signatures](#)

Medical Events

- **Calls can be recorded for Medical Events**
 - Optionally place the Medical Event lookup field on Call page layout(s)
- **Place the Medical Event related list on Account page layouts**

The screenshot displays a Veeva CRM form for a call record. The form is divided into two main sections: "Professional Information" and "Attendee Specific Fields".

Professional Information

- Account:** Enrico Orlandoni
- Address:** 174 Edison Rd, Lake Hopatcong, NJ 07849
- Sample Card #:** (Empty text field)
- Sample Card Reason:** --None--
- Medical Event:** NJ Oncology Seminar (with a search icon)
- Datetime:** 8/16/2011 8:00 AM
- Status:** --None--
- Call Type:** (Empty text field)
- Record Type:** Call Report

Attendee Specific Fields

- Attendee Type:** (Empty text field)
- Subject:** (Empty text field)

A red box highlights the "Medical Event" field and its search dropdown. The dropdown is titled "Search" and contains the following items:

- NJ Oncology Seminar (highlighted in blue)
- Go! Cancel
- NJ Oncology Seminar 2009-11-09

Medical Events – Managing Attendees

- Users can add multiple attendees at the same time to a Medical Event
 - Business accounts display the hierarchy to make the related person accounts available
 - Business accounts cannot be added as attendees

Medical Event Detail [Edit] [Delete] [Record a Call] [Manage Attendees] [View Signatures]

Event Name	New York Seminar	Active	<input checked="" type="checkbox"/>
Start Date	10/7/2014	Event Type	Education
End Date	10/10/2014	Website	http://www.sfoncology.com
Location	New York	Account	Chilton Memorial Hospital
Description	Oncology seminar of New York	Address	250 West 19th Street

▼ **Event Expenses**

Submit Expense	<input type="checkbox"/>	Expense Post Status	
Expense Amount		Expense System External ID	

▼ **Product Information**

Primary Product	Restolar	Secondary Product	Cholecap
Created By	Training Attendee 1 , 10/8/2014 3:16 PM	Last Modified By	Training Attendee 1 , 10/8/2014 3:16 PM

[Edit] [Delete] [Record a Call] [Manage Attendees] [View Signatures]

Event Attendees Event Att

Action	Attendee Name	Attendee Type	Status	Signature Datetime	Last Modified Date
Edit Del	Adeola Akinola	Account	Accepted		10/8/2014

Medical Events – Managing Attendees

- **In order to use the Manage Attendees button**
 - Give user profiles access to the Manage_Attendees_vod Visualforce Page
 - Add the Manage Attendees button to the custom buttons section of the Medical Event page layout
 - Add the Mobile_ID_vod field to the Event Attendee object
 - In order to Synch to iPad
 - Give user profiles create permission on the Event Attendee object
 - Also recommended to give Edit and Delete permission



View Medical Event Signatures Online

- It is possible to view signatures of Medical Event attendees online

The screenshot displays the 'Medical Event' interface for the 'NJ Oncology Seminar'. At the top, there are navigation links: 'Customize Page | Edit Layout | Printable View | Help for this Page'. Below these are links for 'Event Attendees [4]', 'Calls [0]', 'Call Discussions [0]', 'Open Activities [0]', 'Approval History [0]', and 'Notes & Attachments [0]'. The 'Medical Event Detail' section includes buttons for 'Edit', 'Delete', 'Record a Call', 'Manage Attendees', and 'View Signatures'. The 'View Signatures' button is highlighted with a red box. A red arrow points from this button to a signature in the 'Med Event Sigs' table. The table has columns for 'Attendee', 'Status', 'Signature Datetime', and 'Signature'. The first row shows 'Clinton Ackerman' with a status of 'Signed_vod' and a datetime of '4/3/2014 8:24 AM'. A handwritten signature is visible next to the name.

Medical Event
NJ Oncology Seminar

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Event Attendees \[4\]](#) | [Calls \[0\]](#) | [Call Discussions \[0\]](#) | [Open Activities \[0\]](#) | [Approval History \[0\]](#) | [Notes & Attachments \[0\]](#)

Medical Event Detail [Edit](#) [Delete](#) [Record a Call](#) [Manage Attendees](#) [View Signatures](#)

Event Name NJ Oncology Seminar Active ☒

Start Date 9/16/2013 Event Type Education

End Date 9/16/2013

Med Event Sigs

Attendee	Status	Signature Datetime	Signature
Clinton Ackerman	Signed_vod	4/3/2014 8:24 AM	

View Medical Event Signatures Online

- **In order to use the view signatures online button**
 - Add the View Signatures button to the Medical Event page layout
 - Give user profiles access to the View_Event_Signatures_vod VisualForce page and at least Read permission to the following objects:
 - Medical_Event_vod
 - Event_Attendee_vod
 - Give user profiles FLS access to the following fields on the Event_Attendee_vod object:
 - Attendee Name
 - Status
 - Signature Datetime
 - Signature



Enhanced Calls from Medical Events

- **Additional fields on the Medical Event can be used to pre populate Call data based on attributes of the Medical Event**
 - Account_vod – lookup field for associating an account with a Medical Event
 - Address_vod – lookup field for address based on the selected account

The screenshot shows a form for a Medical Event. The fields are as follows:

Field	Value
Event Name	Pediatrics Seminar
Start Date	6/18/2013 [6/19/2013]
End Date	6/27/2013 [6/19/2013]
Location	San Francisco
Description	Oncology seminar of California in San Francisco.
Active	<input checked="" type="checkbox"/>
Event Type	KOL
Website	www.sfoncology.com
Account	Chilton Memorial Hos
Address	250 West 19th Street

The 'Account' and 'Address' fields are highlighted with a red box, indicating they are used for pre-populating call data.

Enhanced Calls from Medical Events

- **In order to use the enhanced calls functionality**
 - Give users profiles FLS access and add these two fields to the Medical Event page layout(s)
 - Account_vod
 - Address_vod
- **When these fields are populated for the Medical Event**
 - Account/Address fields on the call report will populate from Account/Address fields on the Medical Event
 - Attendees section on the call report will display the attendees from the Medical Event



Enhanced Calls from Medical Events

- When creating a call from a Medical Event

Medical Event

Symposium

« Back to List: Custom Object Definitions

Event Attendees [2] | Calls [5+] | Call Discussions [0] | Open Activities [0] | Approval History [0] | Notes & Attachments

Customize Page | Printable View | Help for this Page ?

Medical Event Detail

Edit | Delete | Record a Call | Manage Attendees | Add Attendee

Event Name	Symposium	Active	<input checked="" type="checkbox"/>
Start Date	6/17/2013	Event Type	Education
End Date	6/19/2013	Website	
Location	Grenoble	Account	Chilton Memorial Hospital
Description	Symposium on cholesterol	Address	250 West 19th Street

▼ Event Expenses

Submit Expense ☐

Expense Amount

Expense Post Status

▼ Product Information

Primary Product	Restolar	Secondary Product	Cholecap
Created By	Managed Services, 6/18/2013 11:31 AM	Last Modified By	Managed Services, 6/18/2013 11:31 AM

Edit | Delete | Record a Call | Manage Attendees | Add Attendee

Event Attendees

Action	Attendee Name	Attendee Type	Status	Signature Datetime	Last Modified Date
Edit Del	Frank Pepitone	Account	Invited		6/18/2013
Edit Del	Kathleen Adler	Account	Invited		6/18/2013

Select the Account
and the associated
Address

Add Event
Attendees

Enhanced Calls from Medical Events

- When creating a call for a business account from a Medical Event

The screenshot shows the 'Call Report' form in Veeva. The form is divided into several sections: Professional Information, Attendees, and Detailing Priority. Callouts highlight specific pre-populated data:


- Account & Address are pre-populated:** Points to the 'Account' field (Chilton Memorial Hospital) and the 'Address' field (250 West 19th Street, New York, NY 10011).
- Medical Event is pre-populated:** Points to the 'Medical Event' field (Symposium).
- Event attendees are in the Attendees section:** Points to the 'Attendees' section, which lists attendees like Adler, Kathleen and Pepitone, Frank.

The form includes buttons for 'Save', 'Save & New', 'Submit', and 'Cancel'. The 'Record Type' is set to 'Call Report' and the 'Sample Card Reason' is set to '--None--'.



Medical Events on My Schedule

- Users (other Sales Reps) can see Medical Events in My Schedule if they either own the Medical Event or are listed as Attendees
- To enable the display of Medical Events on My Schedule
 - Set the Veeva setting ENABLE_SCHEDULE_MEDICAL_EVENT_vod to True
 - This feature is available online and offline

Day	Week	Month	Cycle	<input checked="" type="radio"/> Show work week <input type="radio"/> Show full week								
<div><div>◀▶</div><div> February 13 — 17, 2012</div></div>												
	13	Monday	<div><div>✕</div><div>+</div></div>	14	Tuesday	<div><div>✕</div><div>+</div></div>	15	Wednesday	<div><div>✕</div><div>+</div></div>	16	Thursday	<div><div>✕</div><div>+</div></div>
	NJ Oncology Seminar											

Medical Events – Concur Integration

- **Users can submit expenses directly from the Medical Event without recording a call for the event**
 - Medical Event's expense information can be integrated with Concur
 - Requires Administrator do configure the Concur integration Custom Settings and perform field level mappings
- **To capture expenses, place the following fields on the Medical Events page layout**
 - Submit Expense
 - Expense Amount
 - Expense Post Status
 - Expense System External ID



Surveys

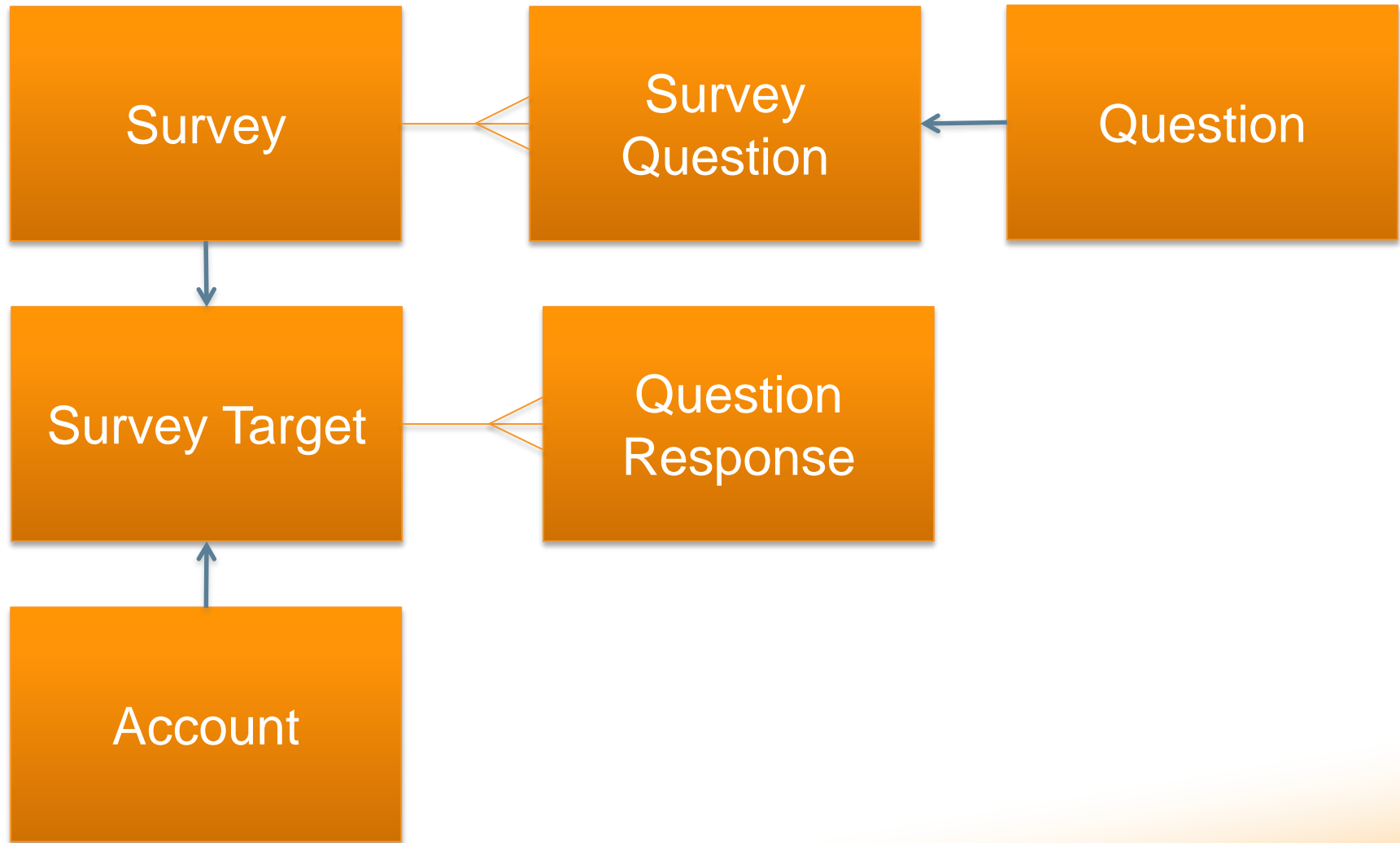


What are Surveys?

- **Surveys are set of questions users can ask Doctors**
 - Sales Reps can use it to help build useful Account profiles by better understanding the needs of their HCPs
 - Marketing can use it to collect information for building effective key messages
 - Surveys can also be used to capture feedback from users instead of HCPs
- **Surveys are easy to design and deploy**
 - Administrators configure and enable Survey functionality
 - Special end-users can create Surveys and does not require a System Administrator to be involved in the process



Survey Data Model Overview



Survey Users



Designers

- End-users who create, design, and publish surveys



Rep/User

- End-users who administer the surveys for their HCPs

Survey Permissions

- Give user profiles the following CRUD permissions on the Survey related objects

Objects for Survey	Designer	Rep/User
Survey_vod	R / C / E / D	R
Survey_Target_vod	R / C / E / D	R/C*/E
Question_vod	R / C / E / D	R
Survey_Question_vod	R / C / E / D	R
Question_Response_vod	R / C / E	R/C/E

- *Only if using Open Surveys or CLM

Survey Configuration

Page Layouts - **Survey, Survey Target, Question**

Tabs for Designers - **Survey, Question, and Survey Target** Tabs
for Users - **Survey Target**

Record Types - Enable all **Survey** and **Question** related record types for all profiles

Designer - enable all new **Survey** visual force pages per profile
Reps only the **Survey Target Execution** and **Add Survey Target**

VMOC records are active for Survey, Survey, Target, Survey_Question, and Question_Response objects

Survey Target Visibility

- **Survey Target ownership assigned based on Survey's assignment type**
 - Territory
 - Territory and Product
- **A user will see the Survey Target if**
 - The Account for the Survey Target is in the user's territory

and
- **The OWD setting for Survey Target is**
 - Private – user must own the Survey Target
 - Public Read – all users see all Survey Targets but can only administer the ones they own
 - Public Read Write – all users can see and administer all Survey Targets



Survey Publishing – Territory Selector

- **Survey Targets assignment rules support the selection of multiple territories**
 - Children of the selected territories in the hierarchy are automatically selected
 - Insert many Accounts from different territories into the Survey as Survey Targets and select the territories to assign the Survey Targets
 - Publish the Survey and the Survey Targets are assigned to users in the selected territories
- **Configuration**
 - Remove the Included users territories: Territory_vod__c field and add the the Included users territories: Territories_vod__c to the Survey page layout
 - Give user profiles FLS access to the Survey_vod.Territories_vod__c field
 - Clear VOD Cache



Survey Target Related List

- Add the Survey Target related list to Professional page layouts
 - Allows users to create a Survey Target for their HCPs for open surveys
 - Survey field “Allow users to chose target?” field must be set to true
 - Configure Survey Target related list to use the Veeva New Survey Target button

Standard Buttons:
Select standard buttons to display on the related list.

☒ New

Custom Buttons:
Select custom buttons to display on the related list. You can also re-order the selected buttons.

Available Buttons

Selected Buttons
New Survey Target

Add
Remove
Up
Down

Survey Target by Account Type

- Adding survey targets to open surveys can be limited by account type
 - Designer creates a Survey and sets the Account Types to Professional and thereby prevents a survey intended for Professionals from being shown to Pharmacies
- Configuration
 - In the Survey object, give user profiles FLS access to and add the Account_Type_vod field to the Survey page layout

The screenshot displays the 'Information' tab of a survey configuration interface. The 'Account Types' field is highlighted with a red box. It shows a list of account types: MCO, Organization, Person Account, Pharmacy, Practice, Publication, and Wholesaler. A 'Chosen Professional' selection is visible next to the list. Other fields include Survey Name (Cholecap Survey), Record Type (Recurring), Start Date (5/30/2013), End Date (5/1/2016), Owner (Training Attendee 1), Status (Development), Channels (Available), Language (English), and a 'Chosen' dropdown menu with options CLM and CRM. A legend indicates that a red bar next to a field name signifies 'Required Information'.

Internal Surveys

- **Allow surveys to be administered to users (employees) instead of Accounts**
 - Survey Targets are users and can be automatically generated based on selected product or territories
 - Create a survey to get feedback about specific topics from employees
 - Select the desired product / territories
 - Click the Automatically create target records checkbox and then publish the survey
- **Configuration**
 - Refer to the [Veeva CRM Online Help](#)



Survey Publishing – MC Engine

- **SFDC allows only up to 5 Surveys to be published currently**
 - Customers can continue to use SFDC publishing
- **Multi-Channel Engine allows more than 5 surveys to be published at a time**
 - Allows customers who frequently publish surveys or run many other batch jobs on SFDC, to publish more Surveys concurrently while other jobs run
- **Configuration**
 - Enter a value of **1** for the **Survey Publish Apex** Veeva Setting
 - Clear VOD Cache



Survey Publishing – Survey Admin Tab

■ When using MC Engine to publish Surveys

- Go to the Survey Admin VF tab
- Enter integration user credentials – system will use the account to write data back to SFDC after publishing a survey

■ Configuration

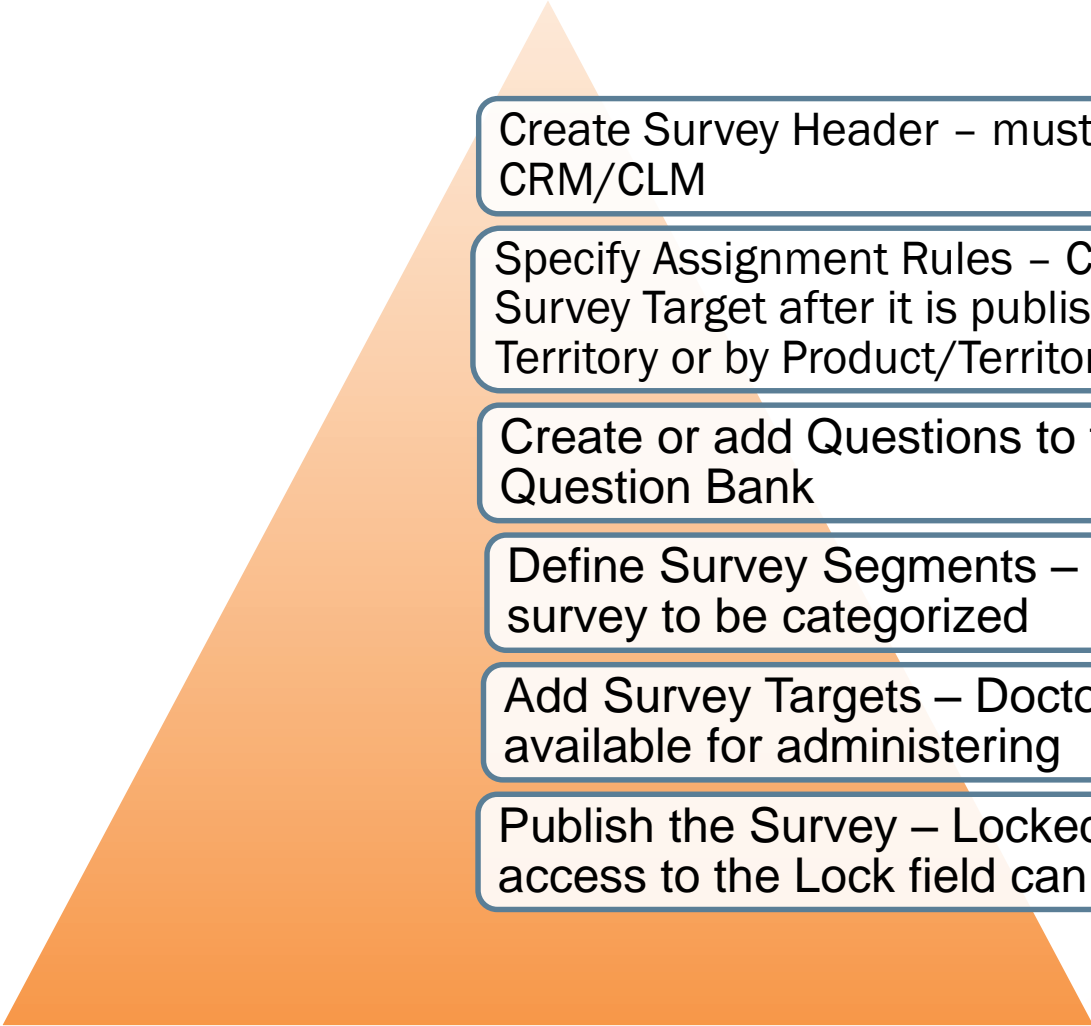
- Create a **VF page** tab for **Survey Administration** and give the Survey Admin(s) access to it
- Give the integration user profile edit permission to the Survey_vod, Survey_Target_vod, and the Survey_Question_vod objects

■ Survey Administration tab

- Shows a record for each Survey published
- Survey Admins can download a .csv displaying the publish details



Demo - Survey Design



Create Survey Header – must specify Channel – CRM/CLM

Specify Assignment Rules – Control the owner of the Survey Target after it is published – Can be by Territory or by Product/Territory

Create or add Questions to the survey from the Question Bank

Define Survey Segments – allows the results of survey to be categorized

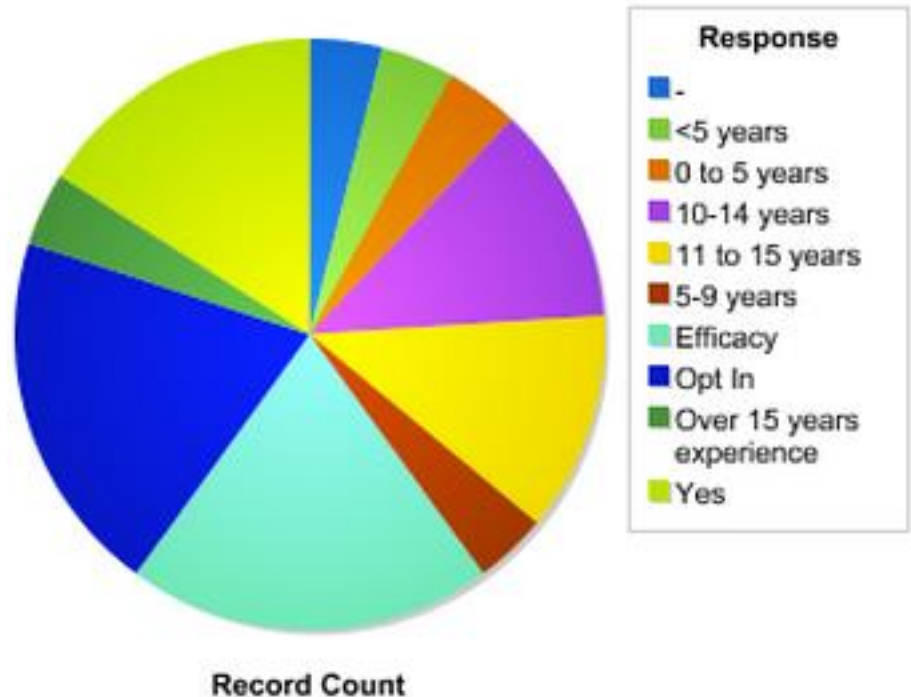
Add Survey Targets – Doctors the survey is available for administering

Publish the Survey – Locked and only users with access to the Lock field can unlock



Survey Reports

- **Define reports to show Account information along with Survey Response**
 - Create → Report Type
 - Account with Survey Targets and Survey Responses
- **Define Reports to show Question Responses**



Medical Inquiries, Medical Events and Surveys on iPad



Medical Inquiries – Create

- Users can create Medical Inquiries offline
- Medical Inquiries related list must be on Account page layout(s)
- Tap the + sign in the Medical Inquiries related list and add details
- Multiple Medical Inquiries can be created at the same time

Cancel Sign

Information			
Medical Inquiry Id		Status	Saved
Account	Clinton Ackerman	Disclaimer	Enter Disclaimer Text Here.

Inquiry Information

Medical Inquiries

Product	Cholecap
Delivery Method	Mail
Address	250 East 17th Street,...
Ship to New Address	<input type="checkbox"/>
Phone	--None--
Fax	--None--
Email	clinton@mail.com
Rush Delivery	<input type="checkbox"/>
Enter Medial Inquiry text here...	

CRM

Medical Inquiries – Sign

- Tab the sign menu to capture physician's signature
- Sign once when capturing multiple Medical Inquiries at the same time

AcceptClearCancel


Clinton Ackerman

Product	Delivery Method	Delivery Details	Inquiry Text
Cholecap	Mail	250 East 17th Street New York, NY 10023	Enter Medial Inquiry text here...


Enter Disclaimer Text Here.



X


August 4, 2014 at 9:01 PM

Medical Events – Create

- Users can create Medical Events offline
- Click Medical Events menu
- Tap the + sign and add Medical Event details

Medical Events 

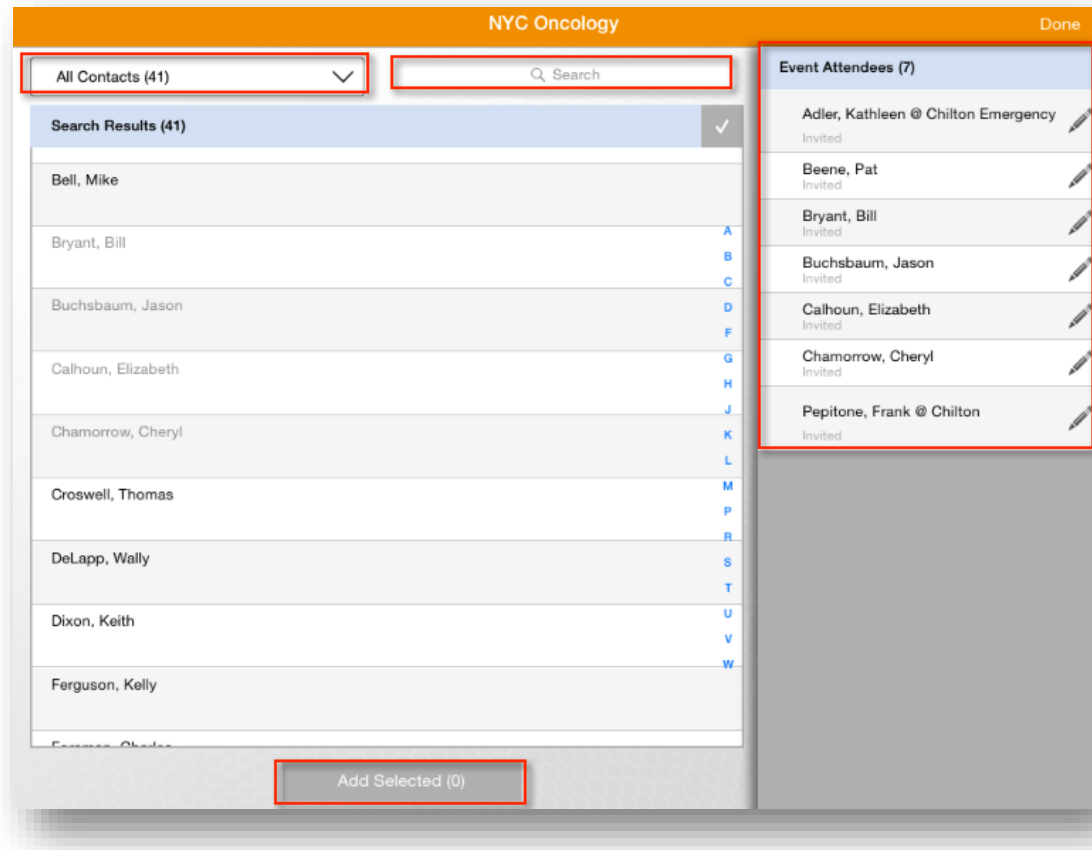
**NJ Oncology Seminar**
10/12/2013 - 10/14/2013 Created for training. 

**NYC Oncology**

Event Name	NYC Oncology	Active	<input checked="" type="checkbox"/>
Start Date	9/4/2014	Event Type	Education
End Date	9/4/2014	Website	www.philonco.com
Location	New York	Account	Chilton Memorial Hospital
Description	Oncology Seminar	Address	250 West 19th Street

Medical Events – Manage Attendees

- Users can manage Medical Events Attendees offline
- Tap the + sign on the Event Attendees related list
 - Filter accounts
 - Select desired account(s)
 - Tap the Add Selected button



Medical Events - Attendee Sign In

- Attendees can sign in for the Medical Event using the electronic sign-in sheet
 - iPad is locked so it is safe to pass the it around
 - User has to enter password to exit the sign in page
- The signature of each attendee is captured
 - Automatically updates the status of the physician's attendance




The screenshot shows a digital sign-in interface for 'NYC Oncology' in 'New York'. The interface has a grey header with the event name and location. Below the header is a table with four rows, each representing an attendee. The first three rows have handwritten signatures next to the names. The fourth row, for 'Buchsbaum, Jason', has a green 'Sign' button next to the name. A small lock icon is visible in the top right corner of the header area.

NYC Oncology New York	
Adler, Kathleen	
Beene, Pat	
Bryant, Bill	
Buchsbaum, Jason	

Surveys

- Users can Administer and submit Surveys from offline
- Save button can be removed
 - Go to the Survey Targets object and remove the Saved_vod value from the Status picklist in the desired record type (One Time or Recurring)

iOS Simulator – iPad / iOS 7.1 (11D167)

Cancel Cholecap Survey 

Ackerman, Clinton

What's your preferred statin? Cholecap

Does your site have Internet Access?

Yes

No

Where do refer patients to learn more about how to live with high cholesterol? heart.org

Have you ever spoken or presented at professional conferences

Yes

No

Save

Submit

Module Summary

- **Configured Veeva functionality including**
 - Medical Inquiries
 - Medical Events
- **Provided an overview of:**
 - Surveys
- **Viewed Medical Inquiries, Medical Events, and Surveys on iPad**



Labs

Configure Medical Events

