



Data Access Security

Veeva Professional Services

Module Objectives

- **Configure Access to Functionality and Data**
- **Describe the different mechanisms for securing access including**
 - Profiles
 - Permission Sets
 - Field Level Security
 - Record Ownership
 - Organization-Wide Defaults
 - Role Hierarchy
 - Territory Hierarchy
 - Sharing Rules
- **Create and manage user accounts**



Profiles



Profile Definition

- **Profile is a collection of settings and permissions that determine**
 - What users can see in the application user interface
 - What users can do with what they see
- **Create profiles based on job functions**
 - System Administrator, Primary Care, Medical Scientific Liaison (MSL), Managed Markets, or Sales Operations
- **Users are assigned to one profile**
- **Minimize the number of profiles to have fewer profiles to configure during upgrades**



Accessing Profiles

- To create or configure profiles go to
 - Setup → Manage Users → Profiles
- End-users profiles normally have the word Platform in their names

Profiles

All Profiles

Edit | Delete | Create New View

New Profile

A | B | C | D | E | F

<input type="checkbox"/>	Action	Profile Name ↓	User License	Custom
<input type="checkbox"/>	Edit Del ...	VExample Primary Care Sales Management - Platform	Salesforce Platform	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Edit Del ...	VExample Primary Care Sales - Platform	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Standard Platform One App User	Salesforce Platform One	<input type="checkbox"/>

Application Access

Custom App Settings					
	Visible	Default		Visible	Default
Configuration	<input type="checkbox"/>	<input type="checkbox"/>	Platform	<input type="checkbox"/>	<input type="checkbox"/>
CRM Insights Admin	<input type="checkbox"/>	<input type="checkbox"/>	Sampling Admin	<input type="checkbox"/>	<input type="checkbox"/>
Dupe Eliminator	<input type="checkbox"/>	<input type="checkbox"/>	Veeva CRM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- An application is a collection of tabs
- Typically, end-users profiles will have access to the Veeva CRM application only
 - Certain user profiles, such as a Sales Operations profile may have access to additional applications, such the Sampling Admin application

The screenshot shows the Veeva CRM application interface. At the top, there is a header with the Veeva logo and 'Train' text. Below the header, there is a navigation bar with tabs: Home, My Accounts, My Schedule, My Samples, Medical Inquiries, Cycle Plans, Speaker Evaluations, and Global Account Search. The 'My Accounts' tab is selected. On the left side, there is a sidebar with a search bar and a 'Go!' button. The main content area shows 'My Accounts Home' with a 'View' dropdown set to 'My Accounts' and a 'Territory' dropdown set to '101'. Below this, there is a 'Download' section with options for CSV and Excel, and buttons for 'New', 'Mass Update', 'Schedule a Call', and 'More Actions'. On the right side, there is a dropdown menu for 'Veeva CRM' which is open, showing a list of applications: Sales, Marketing, Call Center, Vinsights Admin, Sampling Admin, Survey Admin, Approved Email Admin, App Launcher, and Suggestions Admin. The 'Veeva CRM' dropdown is highlighted with a red box.



Tab Access

Tab Settings

Standard Tab Settings

Home	Default On	Dashboards	Default Off
Accounts	Default Off	Data.com	Tab Hidden
Answers	Tab Hidden	Documents	Default On
Console	Tab Hidden	Ideas	Tab Hidden
Contacts	Default Off	Reports	Default Off

- **Tabs contain data from specific objects**

- Default On – tab will always appear on the tab bar
- Default Off – tab is available from the “+”
- Tab Hidden – tab is not available to the user

The screenshot shows the Veeva CRM interface. At the top, there's a header with the Veeva logo, a blue callout bubble pointing to the 'Home' tab in the navigation bar that says 'Default On tabs', and a '9 Days Remaining' banner with a 'Subscribe Now!' button. The navigation bar contains several tabs: 'Home', 'My Accounts' (highlighted), 'My Schedule', 'My Samples', 'Medical Inquiries', 'Cycle Plans', 'Speaker Evaluations', and 'Global Account Search'. To the right of these tabs is a '+' icon and a dropdown arrow. Below the navigation bar, the main content area shows 'My Accounts' with a 'Home' button and a 'View' dropdown set to 'My Accounts'. A blue callout bubble points to the '+' icon in the navigation bar, saying 'Default On + Default Off tabs'. The bottom of the screen shows a 'Territory' dropdown set to '101'.

CRUD for Objects Access

- Controls whether users of a profile can read, create, edit, and delete records for each standard or custom object
 - System Administrators also have the “View All” and “Modify All” permissions on all objects

Standard Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>				
Push Topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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"/>
Key Messages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lot Catalog	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Object Record Type Access

- Record Type Settings control the record types available when creating new records for an object

Selected Record Types

Select the record types for this user profile. You need to add the record type field to the page layout associated with

Available Record Types		Selected Record Types
--Master--		Extended Care_vod
Employer_vod		Hospital Department_vod
MCO Plan_vod		Hospital_vod
MCO_vod		Institution_vod
Person Account		KOL_vod
	Add	Laboratory_vod
	Remove	Organization_vod
		Pharmacy_vod
		Practice_vod
		Professional_vod
		Publication_vod
		Wholesaler_vod

Default Record Type

Select the default record type for this user profile. The default record type is used when

Default | Professional_vod

Control what type of Accounts this profile can create

Control the default record type for this profile

Field Level Security Access

- **Field Level Security (FLS) is used to control whether users of a profile can access specific fields**
 - Example, hide the Territory field on the Professional page layout from end-users but display it to the System Administrators
- **If a user profile also has edit (CRUD) permission for an object then the visible fields are also editable**
- **If necessary fields can be made read-only via FLS or via page layouts**
 - Example, for users of a specific profile, you need to make the Specialty account field read-only on the Professional page but editable on the Hospital page



Setting FLS from a Profile

- To set FLS on many objects and many fields for a single profile
 - Setup → Manage Users → Profiles → [Profile] → Field-Level Security → [Field]

Affiliation Field-Level Security for profile

[Help for this Page](#)

VExample Primary Care Sales - Platform

[Edit](#) [Back to Profile](#)

Field Name	Field Type	Visible	Read-Only
AffiliationNumber	Auto Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Child_Affiliation	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments	Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Destroy	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disable Trigger	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Id	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
From Account	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
From Contact	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Influence	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Key Field	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Setting FLS from an Object

■ To set FLS on a single field for many profiles

- Setup → Create → Objects → [Object] → [Field] field detail page → Set Field-Level Security button
- Setup → Customize → Accounts → [Fields] field detail page → Set Field-Level Security button

Set Field-Level Security Help for this Page ?

Comments

Field Label	Comments
Data Type	Text Area(255)

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EMEA - Managed Markets Sales - Platform	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EMEA - Primary Care Sales - Platform	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EMEA System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Managed Markets Director	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Managed Markets Director - Platform	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Managed Markets Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setting Password Policies from Profile

- **Profile Password Policies settings override the organization-wide Password Policies for that profile's users**

Password Policies	
User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must mix alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	30 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>

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

- **Integration user profiles should have passwords that never expire**

Additional Access

- **Profiles are also used to configure**

- Page Layouts assignment
 - Which page layout(s) is being used for all objects per profile
- Enable Apex Class Access
 - Which Apex Classes users of this profile have access to execute
- Enable Visualforce Page Access
 - Which Visual Force Pages users of this profile have access to in the application



Permission Sets



Permission Sets

- Grants permissions at the user level without having to modify or clone profiles
- Define profiles with minimum permissions and then give additional permissions to specific users via permission sets
 - Helps reduce the number of profiles in the org
- Enable the PermissionSet Support Veeva Setting so permission sets are enforced offline on the iPad and Windows devices

PermissionSet Support  

- Veeva provides several standard permission sets



Defining Permission Sets - New

- To create Permission Sets
 - Setup → Manage Users → Permission Sets
- Click the New button to create a permission set

All Permission Sets Edit | Delete | Create New View

New

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R

<input type="checkbox"/>	Action	Permission Set Label ↑	Description	User License
<input type="checkbox"/>	Del Clone	EM_DATA_ADMIN_VOD	Permission set to turn on Veeva Events Manage...	
<input type="checkbox"/>	Del Clone	EM_FIELD_USER_VOD	Permission set to turn on Veeva Events Manage...	
<input type="checkbox"/>	Del Clone	EM_MANAGER_USER_VOD	Permission set to turn on Veeva Events Manage...	

Defining Permission Sets - Information

- Enter the Label, API Name, and Description for the new permission set
- Select Salesforce Platform for the User License

Save Cancel

Enter permission set information

Label

API Name [i](#)

Description

Select the type of users who will use this permission set

Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '—None—' permission set, choose the same license that's associated with them.

User License [i](#)



Defining Permission Sets - Apps

- **Select the desired Apps section**
 - Commonly select Object Settings

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps



Defining Permission Sets - Permissions

- **Select the desired Object**
 - Set the permissions for the object
 - Select a second object and set the permissions for it

[Permission Set Overview](#) > **Object Settings** ▼

Object Settings

Object Name

[Account Authorizations](#)

[Account External ID Map](#)

[Account List Items](#)

[Account Lists](#)

[Account Merge Historys](#)

[Account Overview Layouts](#)

[Account Partners](#)

[Account Plans](#)

[Accounts](#)

[Account Tactics](#)

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

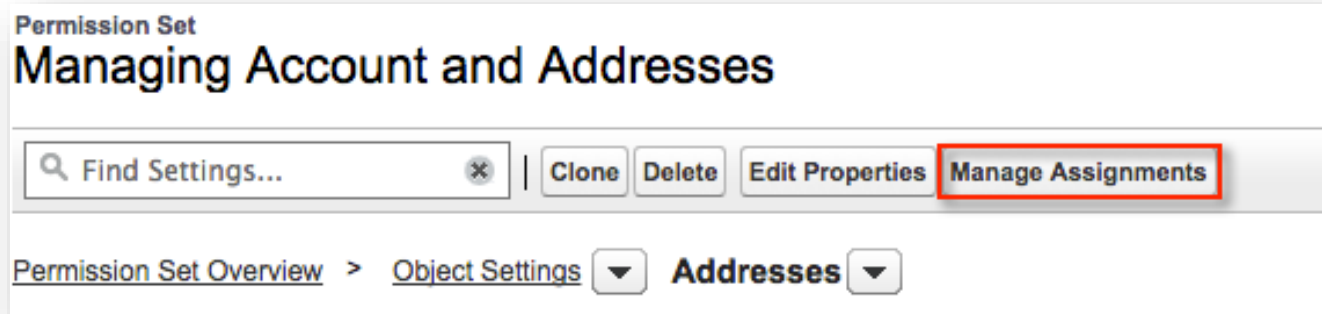
Field Permissions

Field Name	Read	Edit
# Beds	<input checked="" type="checkbox"/>	<input type="checkbox"/>
# Departments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accept Medicaid?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

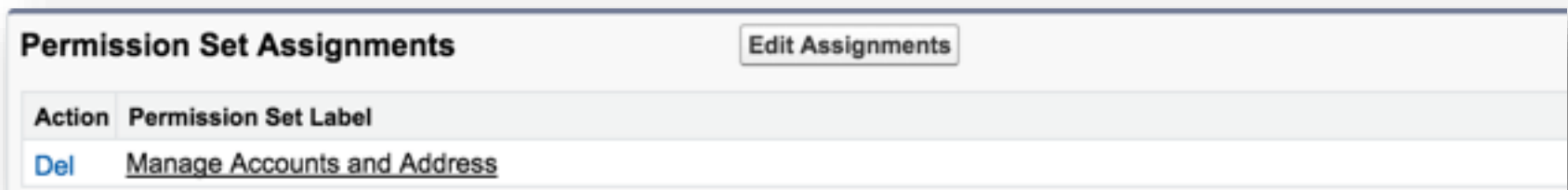


Defining Permission Sets - Assignment

- Once defined, assign Permission Sets to uses
 - Click the **Manage Assignments** button
 - Assign a Permission Set to up to 1000 users at a time



- Can also assign Permission Sets from the user accounts



Record Access

The background is a solid orange color. A thin, vertical orange line is positioned to the right of the text. In the bottom right corner, there are stylized, light orange cloud-like shapes with rounded, irregular edges.

Record Ownership

- **Fundamental element that controls how data is shared**
- **All records in the system must have an Owner**
 - By default, the owner of a record is the creator
- **The owner of a record has the following default rights to the record**
 - View
 - Edit
 - Delete
 - Transfer Ownership
 - Sharing



Sharing Settings - OWD

- The Organization-Wide Defaults (OWD) sharing settings control visibility to the data contained in each object (database table)
- To access and setup OWD go to
 - Setup → Security Controls → Sharing Settings
 - Veeva uses only the Default Internal Access

Sharing Settings

[Criteria-Based Sharing Rules Video Tutorial](#) | [Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for: All Objects

[Enable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

[Edit](#)

[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Account, Contract and Asset	Private	Private	✓



Organization-Wide Defaults

- Organization-Wide Default (OWD) has 4 settings:

Private	Public Read	Public Read/Write	Controlled by Parent
<ul style="list-style-type: none">• Allows only the record owner to view and edit the record	<ul style="list-style-type: none">• Allows all users to view records of an object regardless of record ownership	<ul style="list-style-type: none">• Allows all users to view and edit records of an object regardless of record ownership; this is rare	<ul style="list-style-type: none">• Takes the OWD setting at the parent object, i.e., Address takes Account's OWD setting



Private OWD - Data Sharing

- **Private data can be shared in two ways**
 - Vertically– Managers automatically see the private data owned by their direct or indirect reports via the Territory and Role hierarchies
 - Horizontally – Create sharing rules to share private data between end-users
- **Define public groups to use in sharing rules**
 - Go to **Setup → Manage Users → Public Groups**

A screenshot of a web application interface showing a table of public groups. The table has three columns: 'Action', 'Label ↑', and 'Group Name'. There are two rows of data. The first row shows 'EU Users' with 'Edit' and 'Del' links. The second row shows 'US Users' with 'Edit' and 'Del' links. The table is styled with a light gray header and white body rows.

Action	Label ↑	Group Name
Edit Del	<u>EU Users</u>	<u>EU Users</u>
Edit Del	<u>US Users</u>	<u>US Users</u>

- **Add territories (or roles) to public groups instead of end-users**



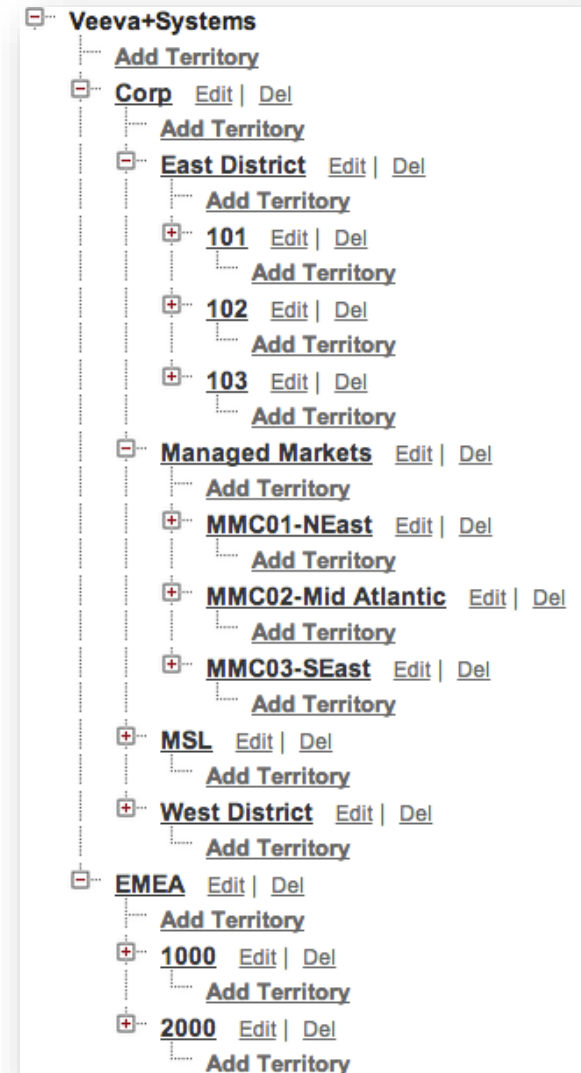
OWD – Public Read – Sharing Rules

- **Lock down data to the most restrictive level, and then use sharing rules to selectively give users the ability to edit the data**
 - Example: If all users need to read Medical Events but some users need to edit them, then set the OWD to Public Read Only and grant certain user groups Read/Write permission to the Medical Event object via sharing rules

Medical Event Sharing Rules			
		New Recalculate	Medical Event Sharing Rules Help
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Entire Organization	<u>Group: Medical Events Editors</u>	Read/Write

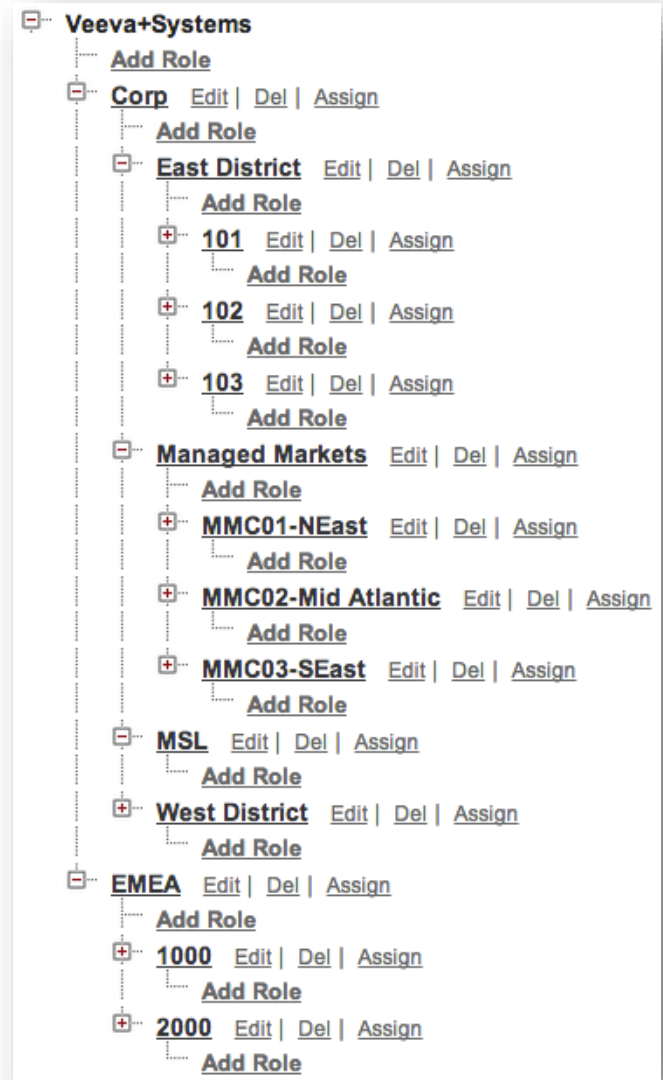
Accounts Visibility - Territory Hierarchy

- **Give users access to Accounts through territories**
 - Accounts are aligned to one or more territories
 - Users are assigned to one territory (in some cases temporarily to more than one)
 - Visibility to accounts is shared up the territory hierarchy
- **To access and setup the Territory Hierarchy go to**
 - Setup → Manage Territories → Territory Hierarchy
 - Add territories as well as edit, delete, and assign users to territories



Private Data Visibility - Role Hierarchy

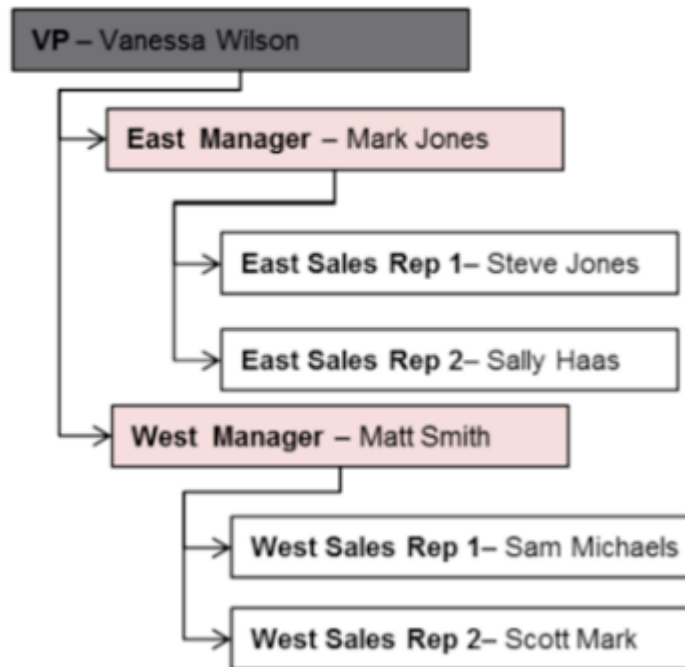
- The Role Hierarchy gives managers visibility to the data with private OWD (excluding Accounts) owned by their direct reports
- To access and setup the Role Hierarchy go to:
 - Setup → Manage Users → Roles → Set Up Roles button
 - Add roles as well as edit, delete, and assign roles to users



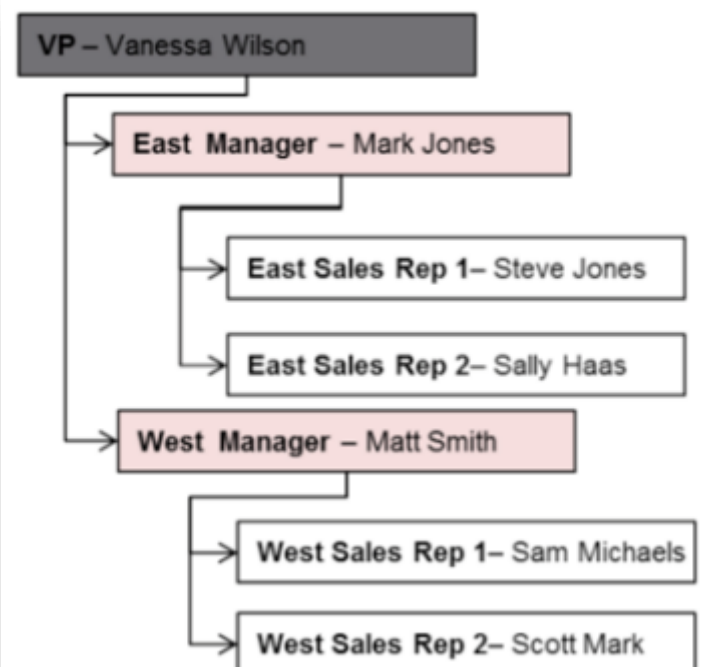
Territories vs. Roles Best Practice

- In Veeva implementations the Territory and Role hierarchies should be identical
- Focus on creating the Territory hierarchy and then make the Role hierarchy exactly the same

- Territory Hierarchy



Role Hierarchy



Change Account Owner Workflow

- **The Veeva My Accounts tab displays an Account if**
 - The Account belongs to the user's territory
 - The user created and therefore owns the Account
- **If the Accounts are realigned to different territories**
 - User still sees Accounts he/she owns even though the account is no longer in the user's territory
- **In Veeva implementations which users are allowed to create Accounts**
 - Create a workflow that updates the Account Owner field and sets it to a designated Administrator user



User Management



Accessing User Management

- To setup and manage user accounts go to
 - Setup → Manage Users → Users

Active Users

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

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

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	
<input type="checkbox"/> Edit Login	ADMIN, EMEA-USER	eadmi	emeauser13117628@42trialforce.com	
<input type="checkbox"/> Edit Login	Carlos, Juan	jcarlos	jcarlos13117628@42trialforce.com	
<input type="checkbox"/> Edit	Henry, Admin	A		8/7/2011 11:11 AM
<input type="checkbox"/> Edit Login	James, Jordan	jjame	jjames1311762803990@42trialforce.com	Regional Accounts Executive
<input type="checkbox"/> Edit Login	Jones, Sarah	sjones	sjones1@v13.com	8/3/2011 3:20 AM Sales Representative
<input type="checkbox"/> Edit Login	Mendez, Lupita	lmend	lmendez1311762803990@42trialforce.com	Regional Accounts Executive

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

Click **Edit** to edit a user's account

Click **New User** to create a new user

Select a user and click **Reset Password(s)** to force users to change their passwords

Creating a New User

User Edit
Henry Almeida

Help for this Page ?

The screenshot shows the 'User Edit' form for Henry Almeida. The form is divided into two main sections: 'General Information' and 'Advanced Information'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Advanced Information' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, and several other checkboxes. A red box highlights the 'Email' and 'Username' fields in the 'General Information' section. A blue callout box points to these fields with the text: 'Username •Must be unique across SFDC •Generally set to user's email'. Another red box highlights the 'Role', 'User License', and 'Profile' fields in the 'Advanced Information' section. A blue callout box points to the 'User License' field with the text: 'User License must be set to Salesforce Platform for Veeva licenses'. A third blue callout box points to the 'Active' checkbox with the text: 'Active •Can't delete users •If a user leaves, inactivate the user account'.

User Edit [Save]

General Information

First Name: Henry
Last Name: Almeida
Alias: halme
Email: henry.almeida@example.c
Username: henry.almeida@pelican.co
Nickname: halmeida
Title: Sales Representative
Company: Veeva
Department:
Division:

Advanced Information

Role: 101
User License: Salesforce Platform
Profile: VExample Primary Call Sales - Platform
Active: ☒
Marketing User: ☐
Offline User: ☐
[Other checkboxes: , , , , ,]

Username

- Must be unique across SFDC
- Generally set to user's email

Active

- Can't delete users
- If a user leaves, inactivate the user account

User License must be set to Salesforce Platform for Veeva licenses



Add User to a Territory

- To access and setup territory hierarchy go to
 - Setup → Manage Territories → Territory Hierarchy
- Click the Add Territory link to add a territory to the hierarchy
- Click the Territory name and then click the Add Users button to assign a user to a territory



Module Summary

- **Configured Access to Functionality and Data**
- **Described the different mechanisms for securing access including**
 - Profiles
 - Field Level Security
 - Record Ownership
 - Organization-Wide Defaults
 - Role Hierarchy
 - Territory Hierarchy
 - Sharing Rules
- **Discussed how to manage and create user accounts**



Labs

- **Create a role**
- **Create a user profile**
- **Access and create territories**
- **Review OWD**

