



VInsights Overview

Veeva Professional Services

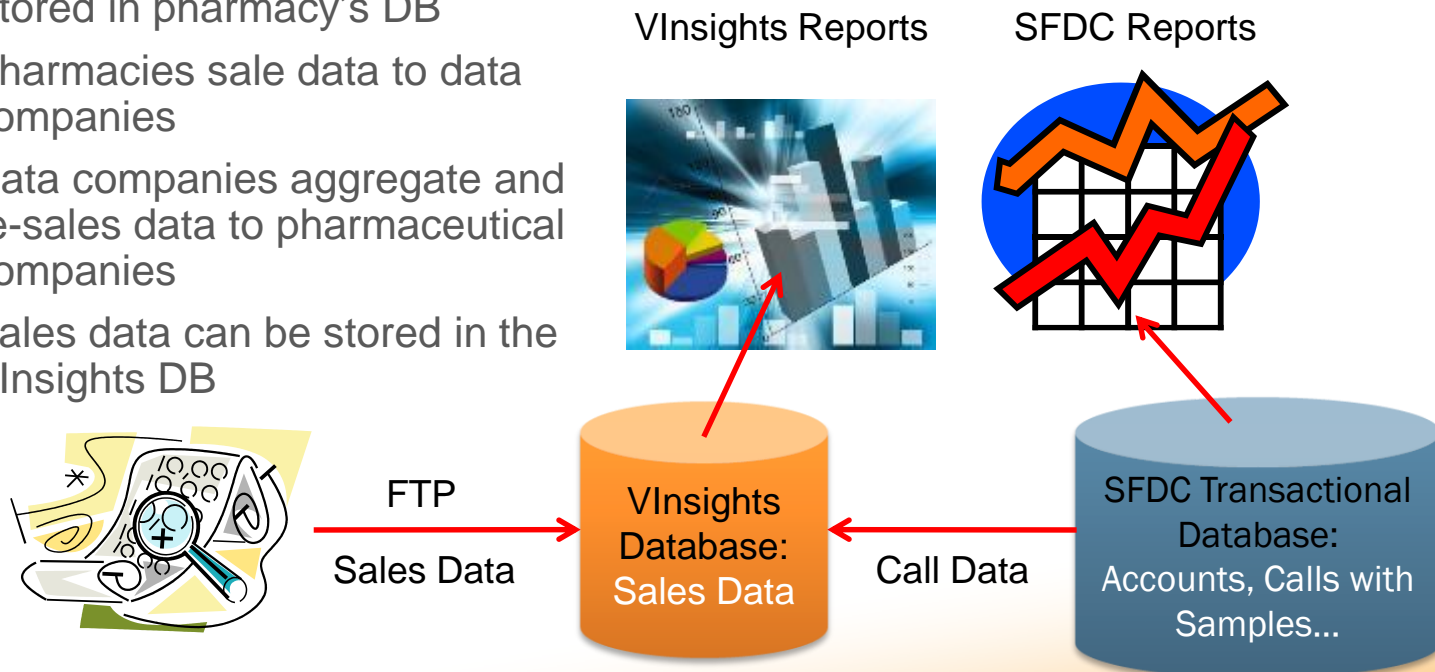
Module Objectives

- **Define VInsights**
- **Discuss the process to enable VInsights**
- **Describe VInsights reports**
- **Provide a link to VInsights configuration online training**



What is VInsights?

- **Users interactions with HCPs are stored in the SFDC (Veeva) transactional database**
 - Calls with samples, Medical Inquiries, etc...
 - Use SFDC reports to analyze transactional data
- **Prescriptions written by HCPs**
 - Filled at pharmacies
 - Stored in pharmacy's DB
 - Pharmacies sale data to data companies
 - Data companies aggregate and re-sales data to pharmaceutical companies
 - Sales data can be stored in the VInsights DB



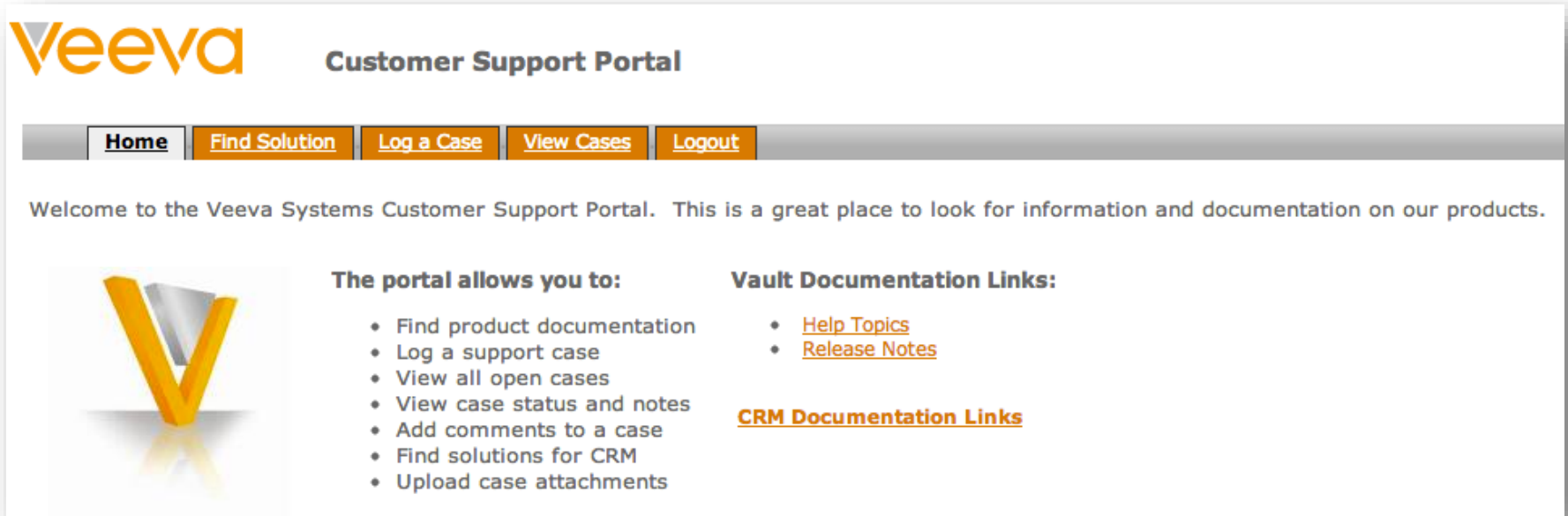
Enabling VInsights



Enabling VInsights

- **VInsights is not enabled by default**

- Log a case with Veeva Systems support through the Veeva Customer Support Portal: <http://www.veeva.com/support/>



The screenshot shows the Veeva Customer Support Portal interface. At the top left is the Veeva logo. To its right is the text "Customer Support Portal". Below this is a navigation bar with five buttons: "Home", "Find Solution", "Log a Case", "View Cases", and "Logout". Below the navigation bar is a welcome message: "Welcome to the Veeva Systems Customer Support Portal. This is a great place to look for information and documentation on our products." Below the welcome message is a large yellow 3D "V" logo. To the right of the logo are two columns of text. The first column is titled "The portal allows you to:" and lists seven bullet points: "Find product documentation", "Log a support case", "View all open cases", "View case status and notes", "Add comments to a case", "Find solutions for CRM", and "Upload case attachments". The second column is titled "Vault Documentation Links:" and lists two bullet points: "Help Topics" and "Release Notes". Below these two columns is a section titled "CRM Documentation Links".

Veeva Customer Support Portal

[Home](#) [Find Solution](#) [Log a Case](#) [View Cases](#) [Logout](#)

Welcome to the Veeva Systems Customer Support Portal. This is a great place to look for information and documentation on our products.

The portal allows you to:

- Find product documentation
- Log a support case
- View all open cases
- View case status and notes
- Add comments to a case
- Find solutions for CRM
- Upload case attachments

Vault Documentation Links:

- [Help Topics](#)
- [Release Notes](#)

[CRM Documentation Links](#)



Enabling VInsights – Logging a Case

- **Click on Log a Case tab**
 - Select CRM for the product
 - Select Analytics Install Request for Case Reason
 - Enter in the description: Would like to enable VInsights
 - Must include 18 digit org ID and Admin user login name (Company Profile > Info)
- **Veeva sends email with VInsights server details**

The screenshot shows a web form for logging a case. It has a light gray background with white form fields. The form is organized into sections with labels in bold blue text. The 'Account Name' and 'Contact Email' fields are at the top right. The 'Product' field is a dropdown menu with 'CRM' selected. The 'Case Reason' field is a dropdown menu with 'Analytics Install Request' selected and an information icon. The 'Priority' field is a dropdown menu with 'Level 4 - Medium' selected. The 'Subject' field is a text input with 'Please Enable VInsights'. The 'Impacted User(s)' field is a text input with 'XYZ Customer'. The 'Description' field is a larger text area with the text 'Please enable VInsights for XYZ Customer prod org with ID: "Paste the Orgs 18 digit SFDC ID" Admin: adminuser@customerxyz.com / Train1234'. At the bottom right are 'Submit' and 'Cancel' buttons.

Account Name:
Veeva Systems

Contact Email:
henry.almeida@veevasystems.com

Product: *
CRM

Case Reason: *
Analytics Install Request

Priority: *
Level 4 - Medium

Subject: *
Please Enable VInsights

Impacted User(s):
XYZ Customer

Description: *
Please enable VInsights for XYZ Customer prod org with ID: "Paste the Orgs 18 digit SFDC ID"
Admin: adminuser@customerxyz.com / Train1234

Submit **Cancel**

VInsights Reports



VInsights Tab

Select a Report

Time Frames used in sales data files are the only ones available for selection

Analytics Territory Comparison Report

Report: Territory Comparison Saved Filters: --None--

Segment

All Accounts

Data Type

TRx

Market

Market Category

My Markets

Market

Cholesterol Reducer

Display Products [Edit](#)

Cholecap 10mg, Cholecap 20mg,
Cholecap 30mg, Cholecap 40mg,
Cholecap 50mg

Territories [Edit](#)

East Coast, NATION

Time Frame

Period

Rolling 12 Month

Scale

Monthly

Start Date

3/28/2011

End Date

7/3/2011

Display Competitors ☒ Display Events

Segment views are the same views as on the My Accounts tab

Click Edit to see all available products and territories



VInsights Tab

Save Filters to save parameters for future use

Analytics
Territory Comparison Report

Report: Territory Comparison
Saved Filters: --None--

Segment
All Accounts
Data Type
TRx

Market
Market Category
My Markets
Market
Cholesterol Reducer

Display Products [Edit](#)
Cholecap 10mg, Cholecap 20mg,
Cholecap 30mg, Cholecap 40mg,
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Time Frame
Period
Rolling 12 Month
Scale
Monthly
Start Date **End Date**
3/28/2011 7/3/2011

Territories [Edit](#)
East Coast, NATION

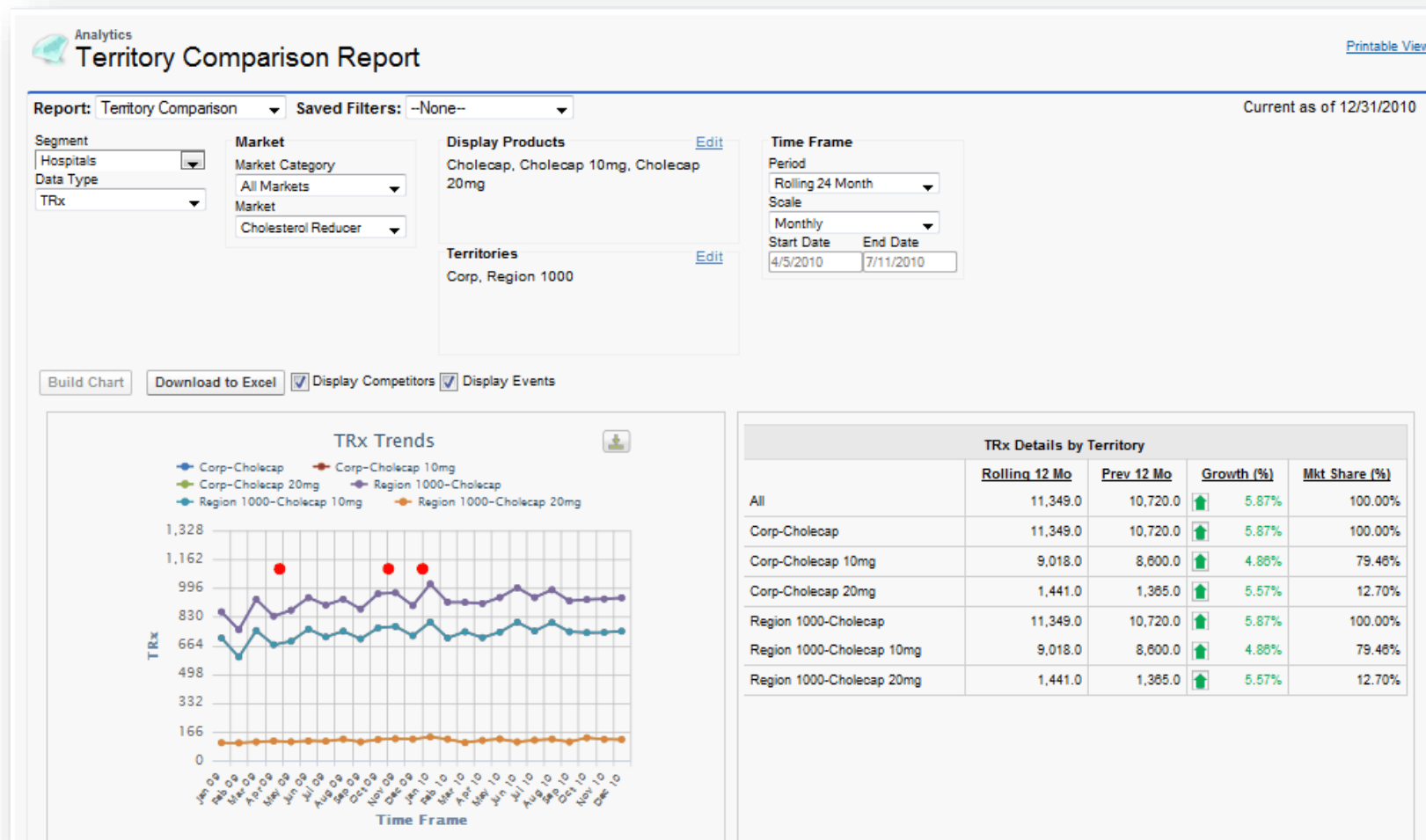
☒ Display Competitors ☒ Display Events

Click Build Chart when adjusting parameters



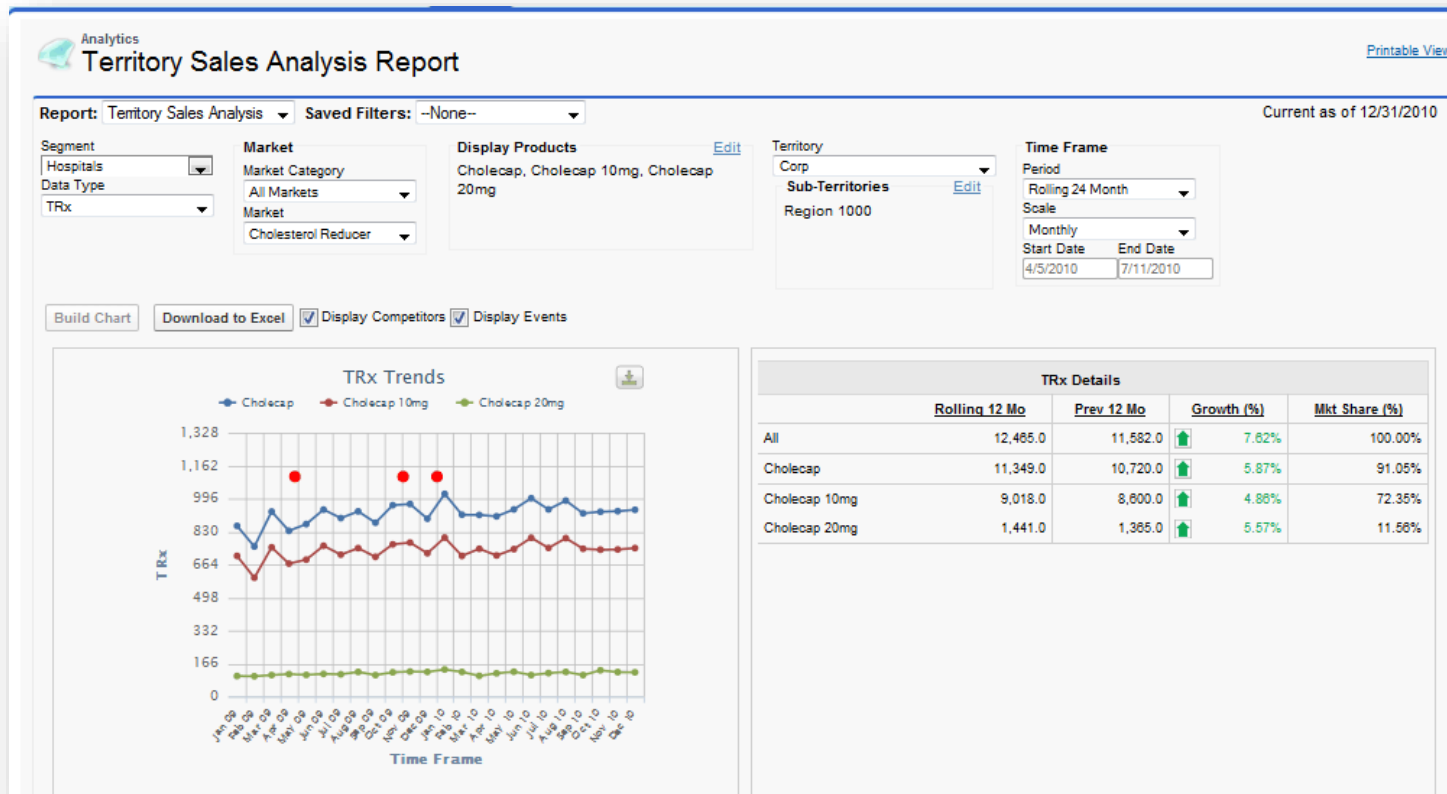
Territory Comparison Report

- Compare aggregated Sales Data across multiple territories



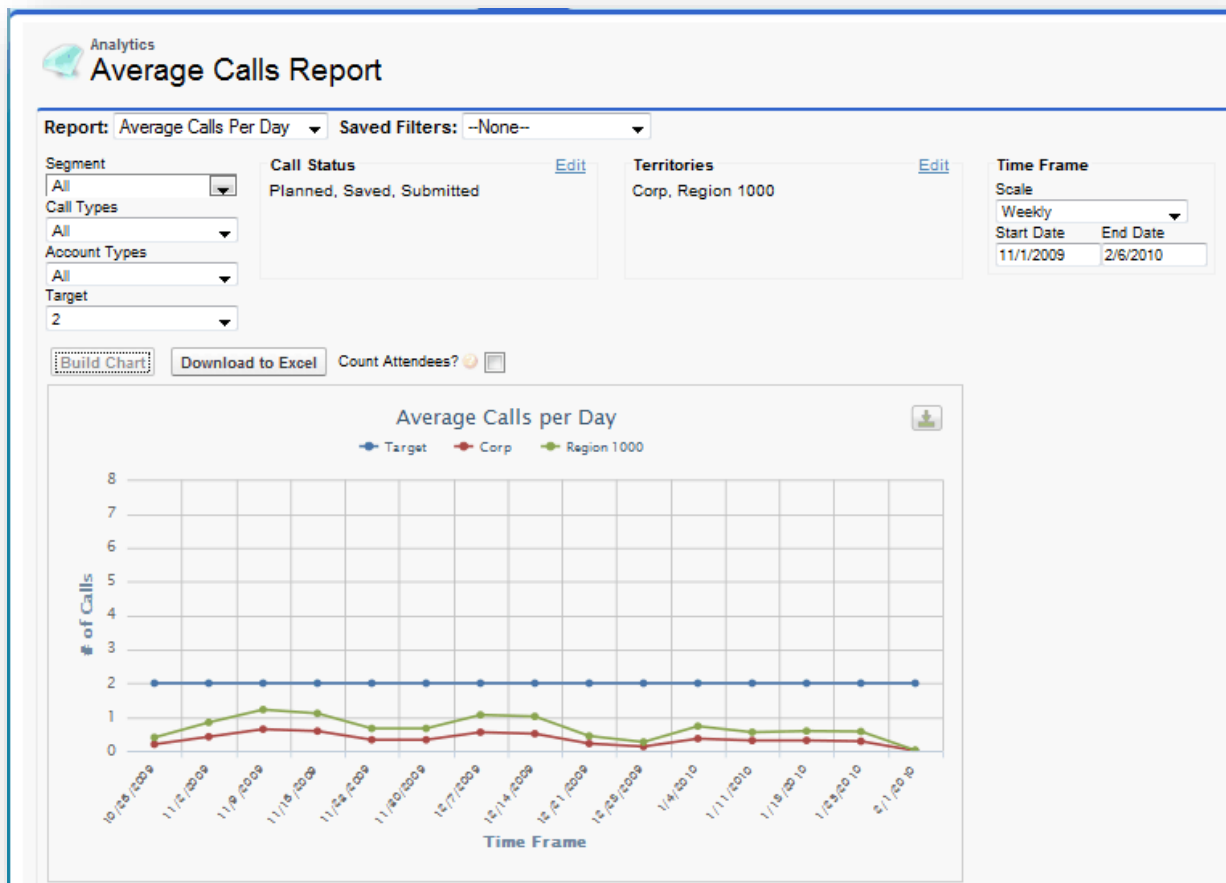
Territory Sales Analysis Report

- Perform analysis on aggregated Sales Data for a specific territory and to analyze performance of products within that territory



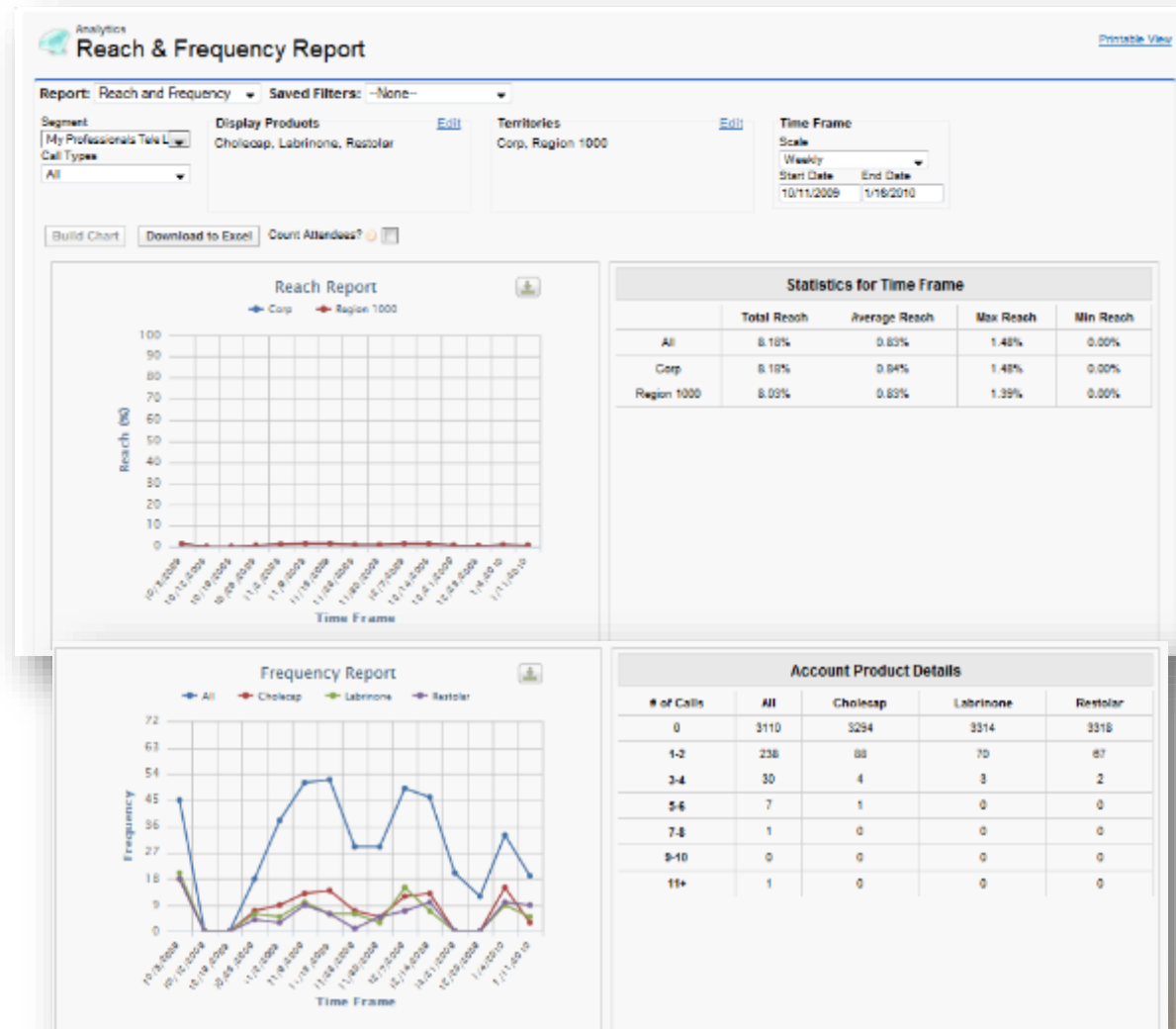
Average Calls Per Day

- Measure average calls per day performed for a given territory over a specific time frame



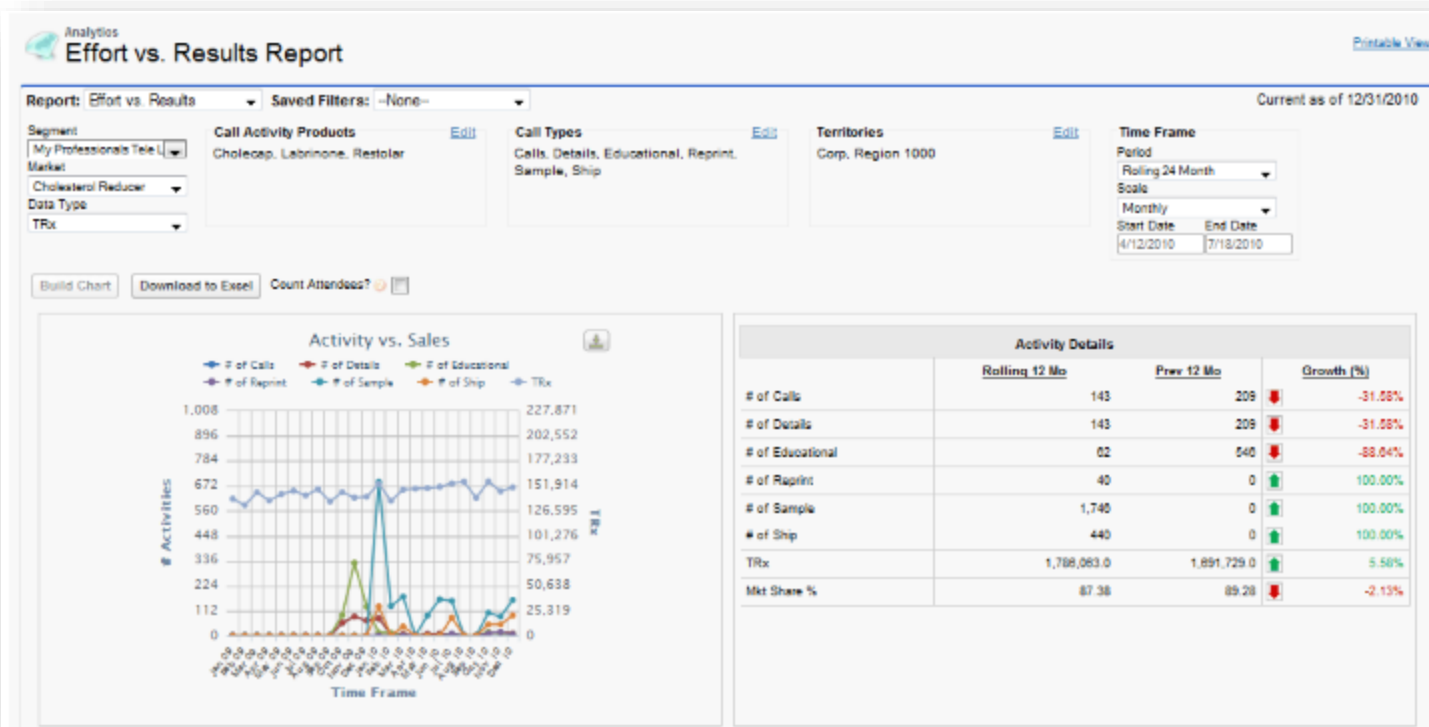
Reach and Frequency Report

- **Reach:** % of accounts with at least one call over a specific time period
- **Frequency:** # of calls ÷ time period



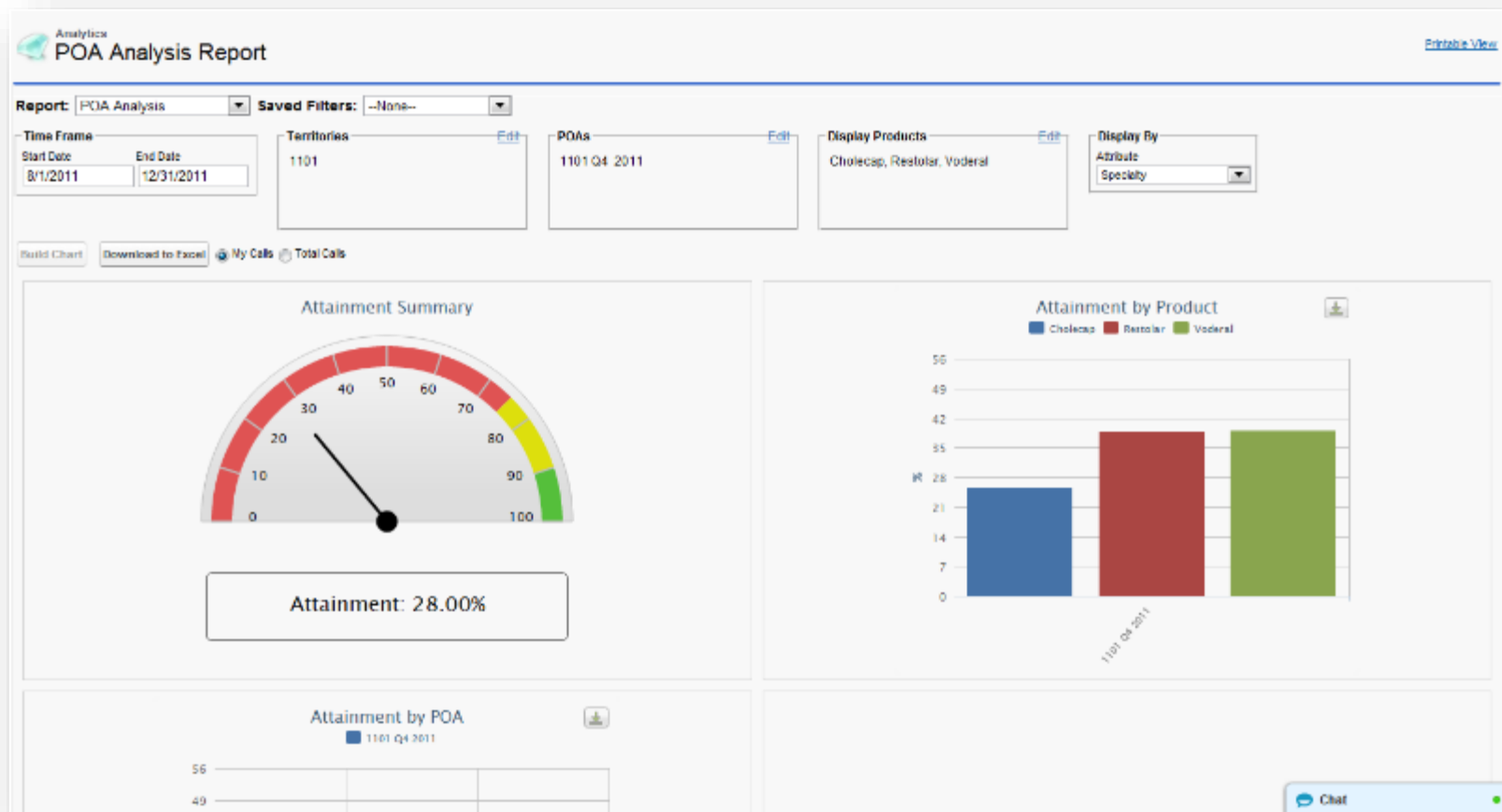
Effort vs. Results Report

- Number of calls made vs. the impact on sales at the account level or territory level
 - Effort: # of calls, samples, promotional items by user
 - Results: sales data loaded



POA (Cycle Plan) Analysis Report

- Analyze cycle plan information, e.g., overall call attainment, attainment by detailed product, and attainment by cycle plan



- **Identify key payer market drivers across their territory, e.g., formulary details for each payer, top payers by product, top accounts for each plan**

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VInsights Configuration

- **Configuring VInsights is a fairly complex process**
- **To learn the essentials of VInsights configuration listen to the following online training session**
 - <https://www.brainshark.com/veevasystems/Vinsights>
 - The slides for the VInsights configuration online training session are also available in the appendix of this module



Module Summary

- **Defined VInsights**
- **Discussed the process to enabled VInsights**
- **Described VInsights reports**
- **Provided a link to VInsights configuration online training**



Labs (Reference Only)

VInsights Setup

- This lab requires a Veeva org with VInsights enabled

Do not perform in the VAT class

Appendix

VInsights Configuration



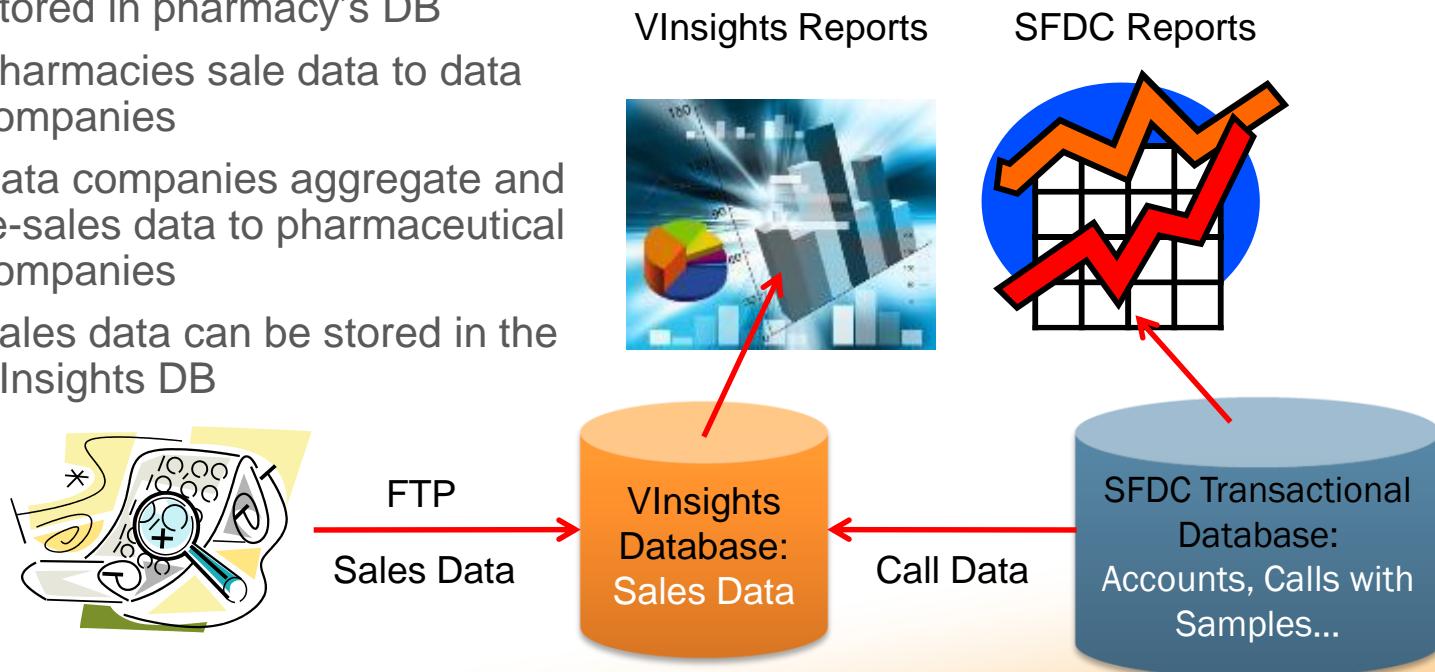
Module Objectives

- **Define VInsights**
- **Enable VInsights**
- **Schedule VInsights apex class**
- **Describe VInsights sales data file**
- **Configure metadata for a sales data file**
- **Upload (FTP) a sales data file**
- **Process and activate a sales data file**
- **Test a VInsights report**
- **Configure VInsights reports page layouts**
- **Discuss additional VInsights topics**



What is VInsights?

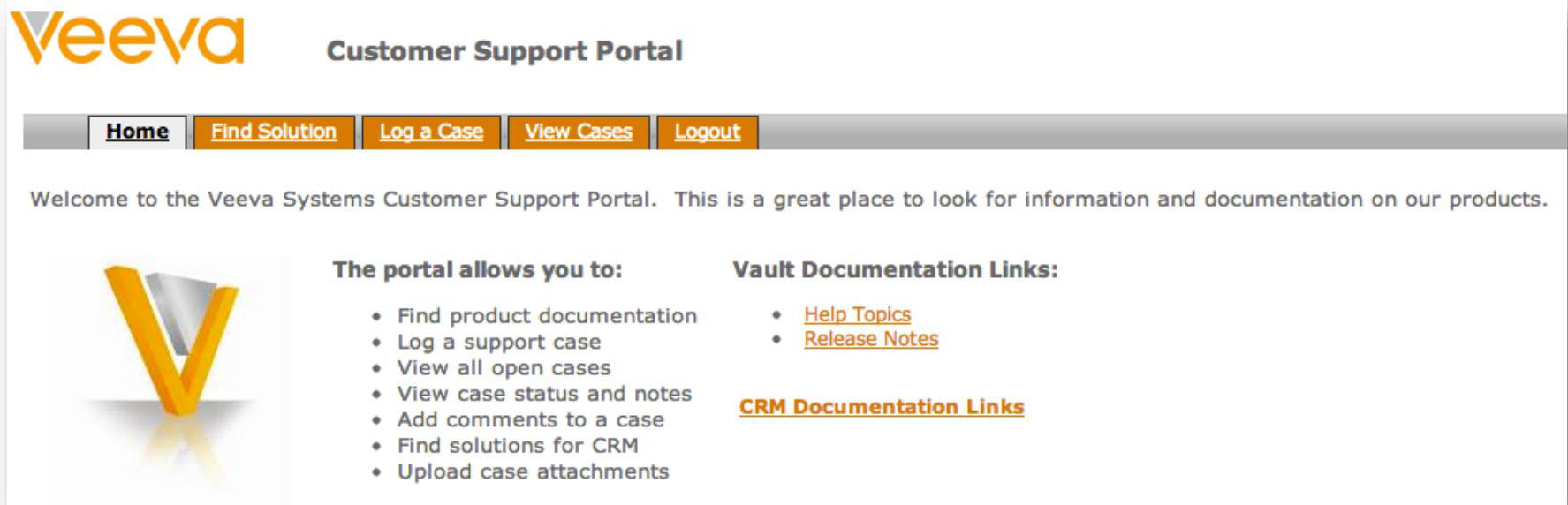
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Veeva Customer Support Portal

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Vault Documentation Links:

- [Help Topics](#)
- [Release Notes](#)

[CRM Documentation Links](#)

VInsights – Call Activity Loading Process

- **To report on Efforts vs. Results and Reach and Frequency, the system must combine call activity (stored in SFDC) with sales data**
 - Calls recorded in Veeva must be loaded into VInsights DB
- **Schedule an Apex Class to load transactional data into the VInsights database**
 - Develop → Apex Classes → Schedule Apex button
 - Search for Veeva_Run_Analytics_Process apex class
 - Select frequency (e.g., nightly) and enter start / end dates



Sample Sales Data File

Source ID represents the Account, e.g., IMS id stored in Veeva

Sales in Dollars for Months 1, 2, 3

Sales in Units for Months 1, 2, 3

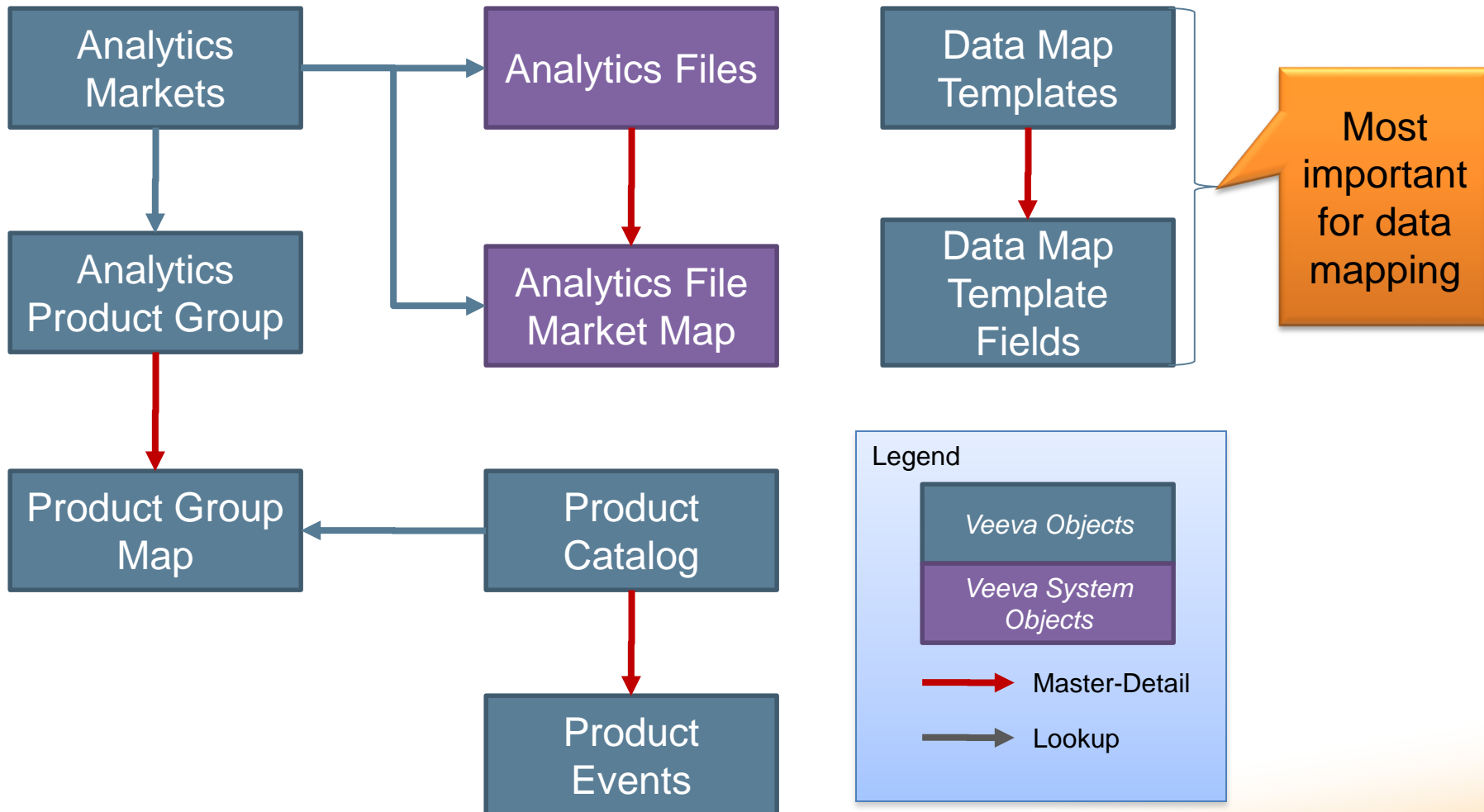
Source ID	Market ID	Product Code	D1	D2	D3	U1	U2	U3
13669200	Cholesterol Reducer	18901	513	1005	2096	5	10	21
70510200	Infectious Diseases	16545	0	1908	1248	0	36	25

Market ID represents the Veeva Analytics Markets

Product Code represents the product in the Veeva Product Catalog



CRM Insights ERD



Sales Data Setup Process

- **Upsert Sales Data unique ID for Veeva Accounts**
 - Populate the ID_vod or ID2_vod fields
- **Load Analytics Markets**
- **Load Analytics Product Group**
- **Load Data Map Template**
 - Load Data Map Template Fields
- **Load and process Sales Data files**



Account to Sales Data Mapping

AccountExtract.csv

Search in Sheet

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General

Conditional Formatting

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	A	B	C	D	E	F
1	NAME	LASTNAME	FIRSTNAME	ID_VOD__C	ID2_VOD__C	EXTERNAL_ID_VOD__C
2	Diane Bond	Bond	Diane	333006		PITTN5KQK5
3	Susan Sawye	Sawyer	Susan	640064		PIW29CUCP8
4	Walter Grote	Grote	Walter	2713764		PI4JV9GMM4
5	Jessica Murp	Murphy	Jessica	661132		PI2XV1JNJ8
6	Monica Ilard	Ilardi	Monica	349484		PI36B78AJ8
7	Katharine Au	Audlin	Katharine	2561027		PI75T7D8K6
8	Edwin Miller	Miller	Edwin	744764		PI66GUF500
9	Pamela Brau	Braunstein	Pamela	696471		PI7KA1M7P5
10	Candy Salern	Salerno	Candy	333586		PIDT47JKT0
11	Mark Endico	Endicott	Mark	358388		PIE17KTN51
12	Susan Shultz	Shultz	Susan	707449		PIAPU646Q7
13	John Priori	Priori	John	742940		PIE36KVCC3
14	Mary Reason	Reasoner	Mary	771773		PIACPUK953
15	Janis Tripodi	Tripodi	Janis	694370		PIGG9CU0E8

Train_Sales_Data.csv

Search in Sheet

Home Layout Tables Charts

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Paste B I U A

Align

General

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	A	B	C	D	E	F
1	SourceID	MarketID	ProductCode	D1	D2	D3
2	333006	DogMarket	2	513	2052	
3	640064	CatMarket	1	0	0	
4	2713764	DogMarket	2	0	1026	
5	661132	DogMarket	2	0	0	
6	349484	DogMarket	2	2052	0	
7	2561027	DogMarket	2	0	0	
8	744764	CatMarket	1	0	0	
9	696471	DogMarket	2	0	3078	
10	333586	CatMarket	1	0	0	
11	358388	DogMarket	2	0	0	
12	707449	DogMarket	2	2052	0	
13	742940	DogMarket	2	0	0	
14	771773	DogMarket	2	513	2052	
15	694370	CatMarket	1	0	0	

Analytics Markets

- Represents a group of products in Veeva
 - Analytics Markets names must be unique and should be copied from the Sales Data file to avoid errors
 - Examples include CatMarket, DogMarket, Cholesterol Reducer
 - Define External ID field and values for Analytics Markets to make it easier to data load them when needed

The screenshot displays the Veeva Train web application interface. The top navigation bar includes 'Home', 'My Accounts', 'My Schedule', 'VInsights', 'Analytic Markets' (highlighted with a red box), and 'Analytics Prod'. A search bar on the left contains 'VoD Message' and a 'Go!' button. Below the search bar is a 'Messages and Alerts' section with the text 'Welcome to Veeva!'. The main content area shows a table of 'New Analytic Market' entries. The table has columns for 'Action' and 'Name'. The entries are 'CatMarket', 'Cholesterol Reducer', and 'DogMarket', each with 'Edit' and 'Del' links. A red box highlights the 'Edit | Del' links for 'CatMarket' and 'DogMarket'. To the right, a data table from 'Train_Sales_Data.csv' is shown. The table has columns A through E. The data rows are numbered 1 through 11. The 'MarketID' column (B) contains values like 'DogMarket' and 'CatMarket'. The 'ProductCode' column (C) contains values like '333006', '640064', etc. The 'D1' and 'D2' columns (D and E) contain numerical values.

	A	B	C	D	E
1	SourceID	MarketID	ProductCode	D1	D2
2	333006	DogMarket		513	2052
3	640064	CatMarket		0	0
4	2713764	DogMarket		0	1026
5	661132	DogMarket		0	0
6	349484	DogMarket		2052	0
7	2561027	DogMarket		0	0
8	744764	CatMarket		0	0
9	696471	DogMarket		0	3078
10	333586	CatMarket		0	0
11	358388	DogMarket		0	0

Analytics Product Group

- Determines the Products that will be displayed on the VInsights reports
 - In this example, ProductCode 2 in the sales data file is defined as Product Group 2 which maps to Cholecap 10mg in the Veeva Product Catalog

Analytics Product Group Detail

Product Group: 2
Display Name: Cholecap 10mg
Parent Product Group:
Market: DogMarket
Created By: Henry Almeida, 4/3/2013 12:45 PM
Last Modified By: Henry Almeida, 12:46 PM

Product Group Maps

Action	Id	Product
Edit Del	PG-00000042	Cholecap 10mg

Excel Spreadsheet Data:

	A	B	C	D	E
	SourceID	MarketID	ProductCode	D1	D2
1	333006	DogMarket	2	513	2052
2	640064	CatMarket	1	0	0
3	2713764	DogMarket	2	0	1026
	661132	DogMarket	2	0	0
	349484	DogMarket	2	2052	0
	2561027	DogMarket	2	0	0
	744764	CatMarket	1	0	0
	696471	DogMarket	2	0	3078
	333586	CatMarket	1	0	0
	358388	DogMarket	2	0	0
	707449	DogMarket	2	2052	0
	742940	DogMarket	2	0	0
	771773	DogMarket	2	513	2052
	694370	CatMarket	1	0	0
	401030	DogMarket	2	0	1026

Product in the Product Catalog

Data Map Template

- Header object for mapping of the fields contained within the Sales Data file and the fields contained in the VInsights database

The screenshot displays the Veeva Train interface for managing Data Map Templates. The top navigation bar includes links for Home, My Accounts, My Schedule, VInsights, Analytic Markets, Analytics Product Groups, Data Map Templates (active), Product Catalog, Analytics Admin, and Analytics Files. The user is Henry Almeida.

Search: VoD Message, Go! (Limit to items I own, Advanced Search...)

Messages and Alerts: Welcome to Veeva!

Recent Items: DogPro CatPro Dollar Units 24 Months

Data Map Template Detail: DogPro CatPro Dollar Units 24 Months

Data Map Template Detail		Data Map Template Fields [5+]	
Data Map Template Name	DogPro CatPro Dollar Units 24 Months	Column Labels Included	<input checked="" type="checkbox"/>
Column Label	Dollars	Payer/Plan Mapped?	<input type="checkbox"/>
Second Column Label	Units	Territory Names Included?	<input type="checkbox"/>
Buckets	24	Active	<input checked="" type="checkbox"/>
Scale	Monthly		
Created By	Henry Almeida, 4/3/2013 12:54 PM	Last Modified By	Henry Almeida, 4/3/2013

Buttons: Edit, Delete, Clone

Data Map Templates

Data Map Template Main Attributes

Field	Description
Column Label	Type of data in the first group (Dollar, NRx)
Second Column Label	Type of data in the second group (Units, TRx)
Column Labels Included	Can ignore column headers in first row
Buckets	Number of data buckets (months) in file
Scale	Determines scale of sales data (weekly or monthly)
Markets Mapped?	Defines if file contains multiple markets



Data Map Template Fields

- Object for explicitly mapping columns in the sales data file to fields in the VInsights database
 - This can also be done via the Data Loader to save time

Data Map Template Fields

New Data Map Template Field

Action	Data Map Template Field Name	Column Number	Vod Field
Edit Del	F-000000574	1	Id_vod__c
Edit Del	F-000000575	2	Market_vod__c
Edit Del	F-000000576	3	Product_Group_vod__c
Edit Del	F-000000577	4	B1_vod__c
Edit Del	F-000000578	5	B2_vod__c
Edit Del	F-000000579	6	B3_vod__c
Edit Del	F-000000580	7	B4_vod__c
Edit Del	F-000000581	8	B5_vod__c
Edit Del	F-000000582	9	B6_vod__c
Edit Del	F-000000583	10	B7_vod__c

Columns in the sales data file

Columns in the VInsights database



VInsights Security Setting

Object	Admin Rights	User Rights
Analytics Product Group	R-C-E-D	Read
Product Group Map	R-C-E-D	Read
Product Event	R-C-E-D	Read
Analytics Files	R-C-E-D	Read
Analytics Layouts	R-C-E-D	Read
Data Map Template	R-C-E-D	
Data Map Template Fields	R-C-E-D	
Sales Transaction	Read	Read
Account	R-C-E-D	Read
Analytics Market	R-C-E-D	Read
Analytics File Market Map	Read	Read
Zip to Terr	Read	Read
Analytics Data Channel	Read	Read



VInsights File Processing



File Processing Steps

- **Obtain the VInsights FTP login information**
 - Provided by Veeva support when they enabled VInsights for a specific org
- **Download and Install an FTP client application such as**



- **Upload and process the sales data**

Uploading Sales Data via FTP

veeva.traning.analytics@vf4.vod309.com - FileZilla

Host: vf4.vod309.com Username: traning.analytics Password: Port: Quickconnect

Response: 227 Entering Passive Mode (128,242,246,172,218,255)
Command: MLSD
Response: 150 Accepted data connection
Response: 226-Options: -a -l
Response: 226 5 matches total
Status: Directory listing successful
Status: Disconnected from server

Local site: /Users/henryalmeida/Desktop/VAT Material/Student Remote site: /

Local site directory structure:

- CRM Insights Sales Data
 - Territory Files
 - UPS (1)
 - Vinsights
 - Documents
 - Downloads
 - Library

Remote site directory structure:

- ctfile
- staged

Local site file list:

Filename	Filesize	Filetype	Last modified
..			
CRDataMapTempExtract.csv	197	Comma Separ...	04/03/2
NP SP Monthly CR.csv	1,636,738	Comma Separ...	04/03/2
TrainDataMapTemplateFields...	1,793	Comma Separ...	04/03/2
TrainDataMapTemplateHeader...	357	Comma Separ...	03/10/2
Train_Sales_Data.csv	3,524	Comma Separ...	04/16/2

Remote site file list:

Filename	Filesize	Filetype	Last modified	Permissions
..				
ctfile		Directory	12/13/2012...	02775
staged		Directory	04/17/2013...	02755
Train_Sales_D...	3,524	Comma Se..	04/17/2013...	0644

Analytics Admin Tab – File Processing

- Once the sales data file is uploaded go to the Analytics Admin tab finalize the process
 - Most importantly Set the File Type to the correct Data Map Template

The screenshot displays the Veeva Analytics Admin interface. The top navigation bar includes links to Schedule, Vinsights, Analytic Markets, Analytics Product Groups, Data Map Templates, Product Catalog, Analytics Admin (selected), and Analytics Files. The main header shows 'Analytics Admin Home' with a 'Refresh' button. Below this, the 'Analytics File Counts' section provides a summary of production and staging row counts. The 'Files Awaiting Processing' section lists a file named 'Train_Sales_Data.csv' with its last modified date, size, and data date. The 'Files In Progress' section indicates no files are currently being processed.

Analytics Admin
Home

Refresh

Analytics File Counts

Production Row Counts	File Type	File Name	Data Date	Market	Data Processed	Row Count
Action Del Reprocess	NP SP Monthly CR	NP SP Monthly CR.csv	3/30/2013	Cholesterol Reducer	4/3/2013 6:24 PM	12073

Staging Row Counts	File Type	File Name	Data Date	Market	Data Processed	Row Count
Action No staged files.						

Files Awaiting Processing

Process Files

Action	File Name	Last Modified	File Size	Data Date	Market	File Type
<input type="checkbox"/> Del	Train_Sales_Data.csv	4/3/2013 1:06 PM	0.003 MB	3/30/2013	Multiple Markets	DogPro CatPro Dollar Units 24 Months

Files In Progress

File Type
No files in progress.

Analytics Admin Tab – File Processing

- After the data file has been processed, the following will occur:
 - The file will be displayed in the Staging Row Counts section
 - Click the Confirm link to promote the file from Staging to Production

The screenshot displays the 'Analytics Admin' tab in a web application. The top navigation bar includes links for 'Schedule', 'Vinsights', 'Analytic Markets', 'Analytics Product Groups', 'Data Map Templates', 'Product Catalog', 'Analytics Admin' (selected), and 'Analytics Files'. Below the navigation bar, the 'Analytics Admin Home' section features a 'Refresh' button. The main content area is divided into three sections: 'Analytics File Counts', 'Files Awaiting Processing', and 'Files in Progress'. The 'Analytics File Counts' section contains two tables. The first table, 'Production Row Counts', shows a file named 'NP SP Monthly CR.csv' with a data date of 3/30/2013, processed on 4/3/2013 at 6:24 PM, in the 'Cholesterol Reducer' market. The second table, 'Staging Row Counts', shows a file named 'Train Sales Data.csv' with a data date of 3/30/2013, processed on 4/17/2013 at 7:11 AM, in the 'Cross Market' market. The 'Files Awaiting Processing' section shows 'No files to process.' The 'Files in Progress' section shows 'No files in progress.'

Analytics File Counts					
Production Row Counts		File Type	File Name	Data Date	Market
Action		NP SP Monthly CR	NP SP Monthly CR.csv	3/30/2013	Cholesterol Reducer
Del Reprocess					

Staging Row Counts					
File Type		File Name	Data Date	Market	Data Processed
Action	DogPro CatPro Dollar Units 24 Months	Train Sales Data.csv	3/30/2013	Cross Market	4/17/2013 7:11 AM
Del Confirm Reprocess					

Files Awaiting Processing					
Process Files					
Action	File Name	Last Modified	File Size	Data Date	Market
No files to process.					

Files in Progress					
File Type					
No files in progress.					

Analytics Admin Tab – File Processing

- The confirm process performs the following actions
 - Moves the sales data from Staging to Production
 - Users can start running VInsights reports

The screenshot displays the 'Analytics Admin' tab in a web application. The navigation bar includes 'Schedule', 'Vinsights', 'Analytic Markets', 'Analytics Product Groups', 'Data Map Templates', 'Product Catalog', 'Analytics Admin' (selected), and 'Analytics Files'. The main content area is titled 'Analytics Admin Home' and features a 'Refresh' button. Below this, there are three sections: 'Analytics File Counts', 'Files Awaiting Processing', and 'Files In Progress'.

Analytics File Counts

Production Row Counts Action	File Type	File Name	Data Date	Market	Data Processed
Del Reprocess	NP SP Monthly CR	NP SP Monthly CR.csv	3/30/2013	Cholesterol Reducer	4/3/2013 6:24 PM
Del Reprocess	DogPro CatPro Dollar Units 24 Months	Train Sales Data.csv	3/30/2013	Multiple Markets	4/17/2013 7:11 AM

Staging Row Counts
Action: No staged files.

File Type	File Name	Data Date	Market	Data Processed
-----------	-----------	-----------	--------	----------------

Files Awaiting Processing

[Process Files](#)

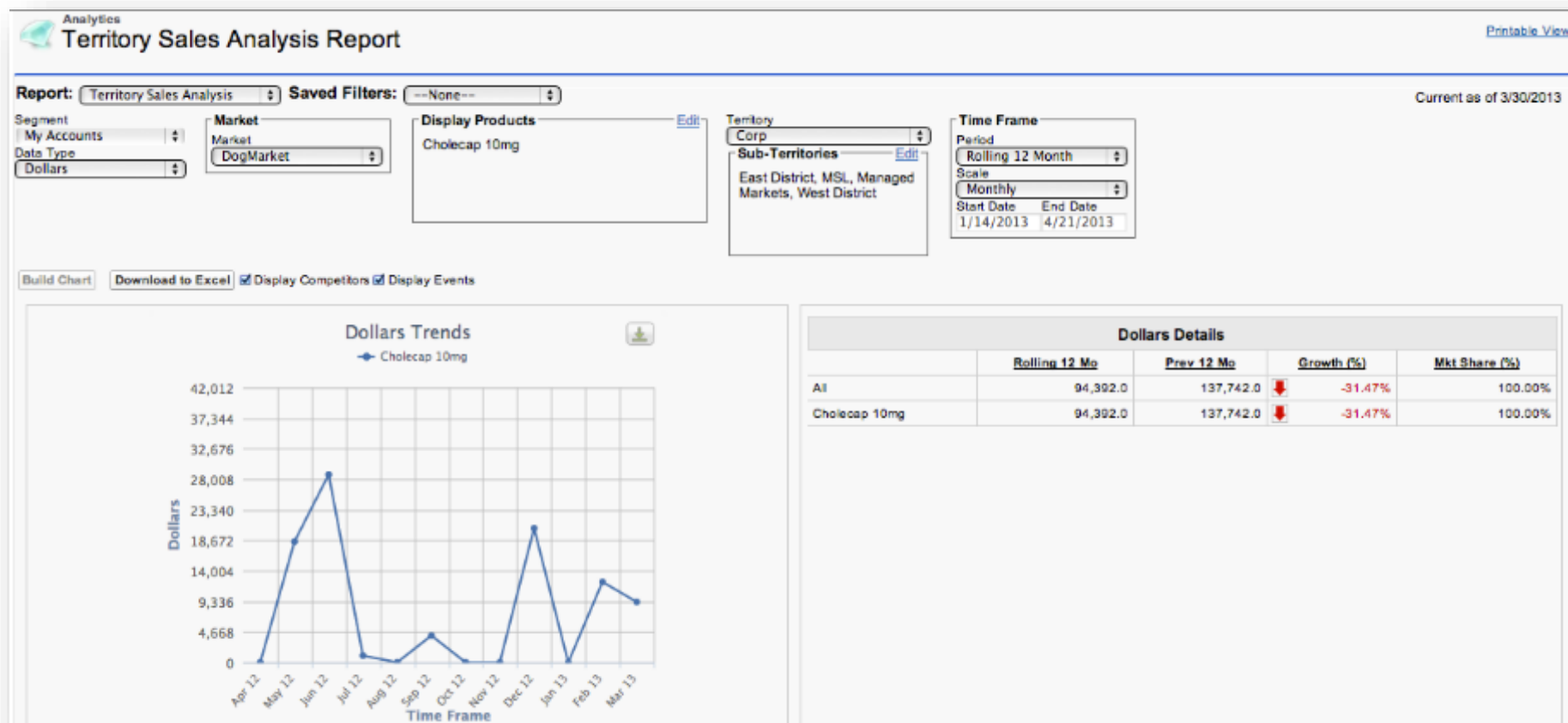
Action	File Name	Last Modified	File Size	Data Date	Market
No files to process.					

Files In Progress

File Type
No files in progress.

Test VInsights Reports

- Login as a test user and run VInsights Reports



Automated Sales Data File Processing

- **To automatically process sales data files:**

- Create a “.ctl” file using a text editor
- The .ctl file should contain the following information in this format:

```
USERNAME=vodadmin@customer.com  
PASSWORD=password  
DATA_DATE=MM/DD/YYYY  
MARKET=marketname  
DATA_MAP_TEMPLATE=templatename  
MOVE_TO_PRODUCTION=True or False  
FILENAME=filename.zip
```

- Upload file to the analytics FTP server in the “ctlfile” directory



Configure Page Layouts

■ Modify Vinsights reports page layout

- Create → Objects → Analytics Layouts → Page Layouts
- Each report has its own page layout
 - Add or remove S-Controls on each page layout
 - All S-Controls start with An_ (for Analytics)

The screenshot displays the 'Effort vs. Results Page Layout' configuration window. At the top, there's a title bar with 'Effort vs. Results Page Layout' and navigation links like 'Mini Page Layout', 'Mini Console View', 'Video Tutorial', and 'Help for this Page'. Below the title bar is a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The main area is divided into a left sidebar with 'Fields', 'Buttons', 'Custom S-Controls', and 'Related Lists'. The 'Custom S-Controls' section is active, showing a table of S-Controls. The table has columns for 'Section', 'Account Summary', and various analytics controls. Two S-Controls, 'An_ER_Activity_Sa...' and 'An_ER_Activity_De...', are highlighted with red boxes. Red arrows point from these boxes to the corresponding S-Controls in the 'Analytics Layouts Detail' section below, which shows a two-column layout with 'An_ER_Activity_Sales_vod' and 'An_ER_Activity_Details_vod'.

Section	Account Summary	An_Average_Calls_...	An_CPA_Frequency_...	An_ER_Activity_Mk...	An_JD_Dtl_Sum_vod	An_RF_Reach_Detai...	An_Rpt_Sales_By_C...	An_Rpt_T
Blank Space	Account Territory...	An_CPA_Attainment...	An_CPA_Target_Lis...	An_ER_Activity_Sa...	An_RF_Acc_List_vod	An_RF_Reach_Trend...	An_Rpt_Sales_Deta...	An_Rpt_T
ACC_TERR_ROLLUP_Rf	Add_Current_To_Event	An_CPA_Attainment...	An_ER_Acct_Report...	An_ER_Activity_Te...	An_RF_Freq_Detail...	An_Rpt_Goals_Deta...	An_Rpt_Sales_Deta...	An_Rpt_T
Account Cycle Plan	Add_Event_Attendee	An_CPA_Attainment...	An_ER_Activity_De...	An_JD_Detail_vod	An_RF_Freq_Trend_voc	An_Rpt_Mkt_Share...	An_Rpt_Sales_Tren...	An_Rpt_T

Analytics Layouts Sample

Analytics Layouts Detail

Standard Buttons: Edit, Delete, Clone, Sharing

Custom Buttons:

Information (Header visible on edit only)

Layout: An_ER_Activity_Sales_vod | An_ER_Activity_Details_vod

VInsights Report Type Access

- Control which VInsights report types users can access
 - Via Analytic Layout record types on user profile

Edit Record Type Settings
Analytics Layouts

Record Type Settings Edit Save

User Profile: VExample Order Management - P
Record Type: Analytics Layouts

Selected Record Types

Select the record types for this user profile. You need to add the record type to the list below.

Available Record Types

--Master--

Selected Record Types

- Account_Summary_vod
- Average_Calls_Per_Day_vod
- Cycle_Plan_Analysis_vod
- Effort_vs_Results_vod
- Reach_And_Frequency_vod
- Territory_Comparison_vod
- Territory_Payer_Analysis_vod
- Territory_Sales_Analysis_vod

Additional VInsights Topics



Account Summary Report

- Provides Sales Data trending and analysis specific to an account
 - Display the details of an account and then click the Account Summary button
- Supported Online and VMobile for Tablet

The screenshot shows the 'Account' page for Dr. Melany Segnit. At the top, there's a header with the account name and a 'Customize Page' link. Below the header, there are links for various data points: Addresses [2], Affiliations [1], Calls (Account) [5+], Call Samples [5+], Medical Inquiries [1], Territory Fields (Account) [4], and Event Attendees [0]. The main section is titled 'Account Detail' and contains a table of account information. To the right of the table, there are buttons for 'Edit', 'Delete', 'Record a Call', 'Account Summary' (highlighted with a red box), and 'Calendar'.

Account Detail	
Name	Dr. Melany Segnit
Middle	
Suffix	
Preferred Name	
Gender	F
Credentials	MD
Specialty	Family Medicine
Specialty 2	
Territories	101, MSL
Account Record Type	Professional [Change]

Account Summary Report



Analytics

Account Summary Report: Segnit, Melany

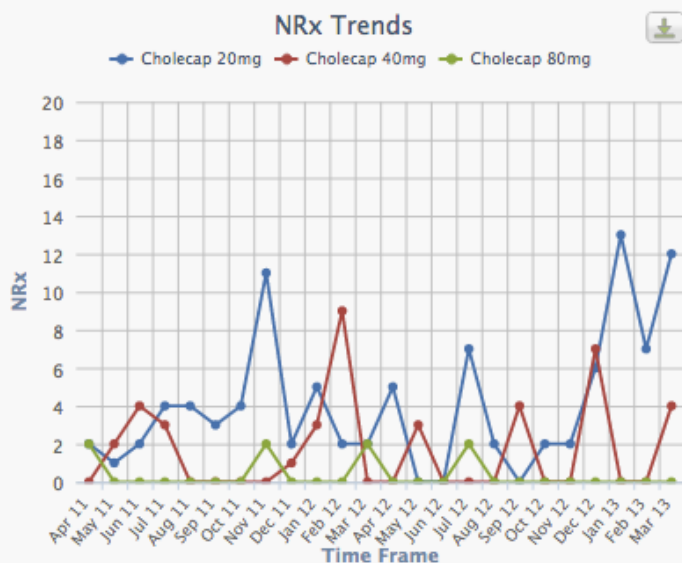
[Printable View](#)

<< [Back to Segnit, Melany](#)

Current as of 3/30/2013

Data Type NRx	Market Market Cholesterol Reducer	Display Products Edit Cholecap 20mg, Cholecap 40mg, Cholecap 80mg	Time Frame Period Rolling 24 Month Scale Monthly Start Date 1/14/2013 End Date 4/21/2013
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[Build Chart](#)
[Download to Excel](#)
☒ Display Competitors
 ☒ Display Events



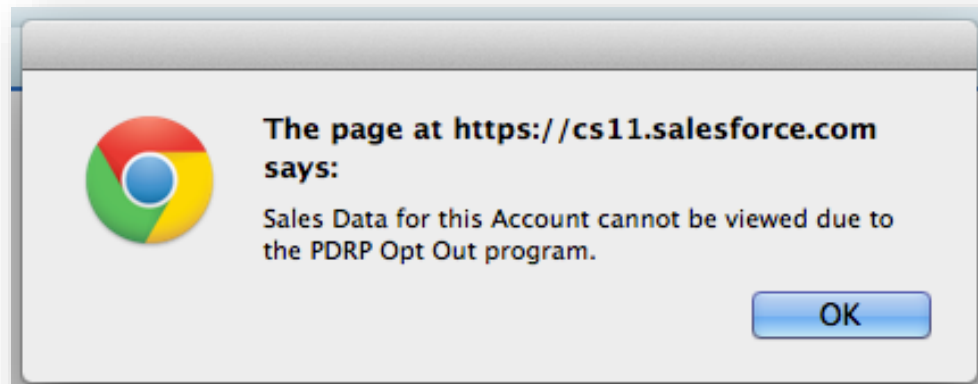
NRx Details

	Rolling 12 Mo	Prev 12 Mo	Growth (%)	Mkt Share (%)
All	76.0	70.0	↑ 8.57%	100.00%
Cholecap 20mg	56.0	42.0	↑ 33.33%	73.68%
Cholecap 40mg	18.0	22.0	↓ -18.18%	23.68%
Cholecap 80mg	2.0	6.0	↓ -66.67%	2.63%



Update Veeva Account Fields

- **PDRP Opt Out – if a Health Care Provider (HCP) opts out, then user will be unable to view Account Level Sales Data**
 - PDRP_Opt_Out_vod__c
 - PDRP_Opt_Out_Date_vod__c
- **Users and Admins need View access via FLS to these fields**
 - Not needed on page layouts
- **Users will see the message below if they click the Account Summary button on an Account set to PDRP Opt Out**



Other VInsights Features

■ Data Aggregation

- If a customer needs to display sales of a clinic that has eight associated physicians, VInsights can display the aggregate sales across those eight physicians when viewing the clinic's Account Summary

■ Sales Goals

- Display Sales Goals and Target along with historical sales
- Goals appear as dashed lines, while actual sales appear as solid lines

■ Analytics Bricks Hierarchy

- A brick-based hierarchy can be used instead of the territory hierarchy for an organization on the Analytics tab

■ Consult the VInsights Guide to learn more



Module Summary

- **Defined VInsights**
- **Enabled VInsights**
- **Scheduled VInsights apex class**
- **Described VInsights sales data file**
- **Configured metadata for a sales data file**
- **Uploaded (FTP) a sales data file**
- **Processed and activated a sales data file**
- **Tested a VInsights report**
- **Configured VInsights reports page layouts**
- **Discussed additional VInsights topics**

