Administration Best Practices

Veeva Professional Services

Module Agenda

- **Discuss the top Administrative things to know**
  - Top Veeva Configuration Rules
  - Top Veeva Consulting Rules
- **List Force.com Configuration Best Practices**
  - Modifying, creating, and controlling access to fields
  - Using record types and page layouts
  - Territory management and role setup
  - Security management
  - Creating custom buttons and tabs
  - Using Apex Data Loader
  - Translation Workbench

Top Veeva Configuration Rules

- **Never delete or modify anything with "_vod" in the name (other than the label)**
  - Including fields, objects, record types, picklists, S-controls and packages
- **Never (unless explicitly instructed) utilize the "_vod" when creating or modifying customer specific objects**
  - This naming convention is used by Veeva to perform upgrade processing and it is possible that non-vod objects with this naming convention could be deleted
- **It is highly recommended to NOT rename Veeva Tabs and out of the box record types**
  - Unexpected results may occur
  - Use the translation workbench to modify the labels instead

Top Veeva Configuration Rules – Continued

- **If you make a configuration to a Veeva CRM specific component, such as modification of the Call Reports or Meeting Briefs**
  - You must clear the cache for all users either from the Clear Veeva Cache tab or the Clear Cache button on the Veeva Message tab
  - Page layout and description is cached by Users in the Veeva UI server to increase performance
- **If you need to change a Veeva Message**
  - Mark the original record as “Inactive” and save it
  - Clone the Inactive record
  - Mark the new record Active
  - Enter value in the Text field
  - Remove the External Id value

Top Veeva Consulting Rules

- **Avoid development customizations as much as possible**
  - Adds risks, extends timelines, and adds maintenance costs to the system
- **If development is unavoidable**
  - Schedule technical resources towards the end of the project since design changes can impact requirements
- **Agree from the beginning what project roles and responsibilities are**
  - How you will conduct the implementation
  - Identify procedures for escalating project risks/problems

Top Veeva Consulting Rules – Continued

- **Discuss documentation processes and requirements upfront**
  - Some companies require heavy amounts of documentation to meet compliance regulations
- **Decide on your object naming and documentation standards before building anything**
  - Even it is a demo, it would be more difficult to clean it up later
- **Request compliance documentation at the launch of a project**
  - To ensure you meet local industry regulations and standards

Top Veeva Consulting Rules – Continued

- **Conduct performance tests from within the customer network on a rep's machine from the start**
  - Bandwidth, outdated browser versions, and network latency can degrade user experience
- **When given access to a new org, never use the vodadmin userid to make changes to the system**
  - Used by development and support teams to access the system
- **Always create the base fields in English**
- **Establish the function of the Systems Architect**
  - Governs changes to the data model
  - Coordinates various logic pieces such as triggers, scheduled jobs, technical design

Top Veeva Consulting Rules – Continued

- **When developing something, always think about "two years from now…"**
  - What happens when my customer wants to add a new business unit?
  - What happens when my customer wants to add a new country?
  - What happens to my integration mappings?
  - Is it clear to that new implementation team what my changes will effect and who?
- **To ensure our systems are built from the ground up with a strong foundation and easier to expand in the future**

Modifying or Creating Fields

- **There are three types of fields on an object**
  - Salesforce.com standard fields – these have limited accessibility for modification and are delivered out of the box
  - Veeva custom fields – delivered by Veeva out of the box they are sufixed with _vod in the api name. Never delete or modify (other than the label)
  - Customer custom fields – created for the customer implementation. Always build the field with the agreed upon customer naming convention

Creating New Custom Fields

- **Always implement the API naming convention agreed upon at the onset of the project**
  - Convention depends on the strategy chosen by the system architect
  - Keep it universal by adding a suffix of the organization
- **Examples**
  - Lvl_Education_pfi__c
  - License_pfi__c
- **Reason**
  - Helps distinguish the difference between Veeva custom fields and customer built custom fields

Question: How would you name a field?

- **Customer asks you to build a Number field “Medical_Inquiry_ID” for Primary Care in Spain.**

- **How would you name “Medical_Inquiry_ID” for Primary Care Spain?**

  - Medical_Inquiry_ID_VERT_ESP_PC_c
  - Medical_Inquiry_ID_VERT_ESP__c
  - Medical_Inquiry_ID_VERT__c

Answer: How would you name a field?

- C: Medical_Inquiry_ID_VERT__c

- **Field name should be self-explanatory**
- **Add a company suffix to all custom fields**
  - If a country or BU change their minds and want to start using that field, then you need to change the API name, which impacts integration and users

Field Comments

- **Identify in the comments section**
  - Group that requested the field
  - ISO codes of the countries
  - Business Units
  - Integrations using the field
- **Examples**
  - UK – Primary Care, Specialty, Oncology, Amadeus Integration;
  - USA – Primary Care, MLS
- **Reason**
  - If field is shared by multiple integrations, groups or countries, the field needs metadata documentation in it for governance
  - Changing a field's properties or values could have a negative impact on the system and break integration

Scenario

- **Customer discovers the Medical Inquiry ID is a number field and needs it to be a text field.**

- **How and where do you get approval to change a field?**
  - Who is governing the system, and what system is there in place to approve of such a change?
    - The IT admin?
    - The Veeva Project Manager on the project?
  - How do you know you are not going to cause a major disruption to someone's business unit or country?
  - How do you know you are not going to cause a disruption to Integration?

Question: What would you enter in the field description?

- **Verteo Spain – Used to capture 3rd party system medical inquiry ID**
- **Verteo Spain – Used to capture 3rd party system medical inquiry ID. Used by Primary Care and Oracle integration**
- **ES; Used to capture 3rd party system medical inquiry ID. Used by Primary Care and Oracle integration**
- **ES; Primary Care; INTEGRATE-Oracle. Used to capture 3rd party system medical inquiry ID**

Answer: What would you enter in the field description?

- **ES; Primary Care; INTEGRATE-Oracle. Used to capture 3rd party system medical inquiry ID**
- **Using Advanced Schema Export Tool, we can export the field name AND the field description**
- **Tagging the country, the business unit, and the word INTEGRATE in the description allows us to filter it in Excel**
- **Using ISO country codes does not give room to interpretation**
- **Without this level of detail in the field, you risk disrupting unknown business units or integration processes**

Veeva Requirements Object (Field)

- **Use the Veeva Requirements Object as a central repository for all system requirements**
  - Paste the URL of the requirement record directly into the field comments
  - Gives administrators more background information about the field
- **Example**
  - [http://na7salesforce.com/001AY869900/] UK – Primary Care, Specialty, Oncology, Amadeus Integration;
- **Reason**
  - Allows administrators to reference the history behind the field and understand its design and change history

Organize Fields

- **Organize your fields by:**
  - Prefixing any unused custom field labels with “z_[fieldname]
- **Examples**
  - z_fax
  - z_website
- **Reason**
  - Salesforce.com sorts the fields by label name so prefixing them will move them to the bottom of the list and out of your way
  - Makes the environment easier to manage

Field Limitation

- **Understand the Field limitations per object**
  - 800 custom fields per object
  - 7 external Id's
  - 10 roll-ups
  - 2 master-detail
  - 25 look-ups
- **Reason**
  - If your org will be expanded to new business units or countries, it is important to understand what Force.com limitations will affect your expansion
  - You may request extensions to this limit but they will have an effect on system performance
  - External Ids are important for adding new integration
  - Roll-up fields affect usability

Field Security

- **Use field level security (except on call object) to hide fields from users instead of page layout**
  - Safer method for restricting accessibility to data due to compliance regulations
- **Reason**
  - Helps minimize the number of page layouts
  - Page layout prevents a user from seeing the field(s) but does not prevent them from seeing it in Salesforce.com reports
  - Only field level security can prevent complete access to fields

Security Profiles

- **Minimize the number of Security Profiles**
  - Reduces the number of field security settings you have to set
  - Always with the least possible number of profiles
  - Clone profiles as needed
- **Reason**
  - Reduces the amount of security profile field level security settings you have to update when you add a new field to an object

Record Type Labels

- **Never change the out of the box label for a record type**
  - Record type labels must always match its API name
  - If it must be done, then use the translation workbench
- **Example**
  - You want to rename the Practice_vod record type and rename the label to Clinic. Use the Translation Workbench → Translate → Language = [English/Target Language] → Object = [Record Type]. Change the Practice_vod to Clinic
- **Reason**
  - Changing the record type label may have unexpected results in the system

Profiles and Page Layouts

- **Minimize the number of Profiles and Page Layouts**
  - Always start with as few as possible then clone them as needed
- **Reuse page layouts**
  - Assign them to as many record types as possible and control the visibility of data using field level security
- **Reason**
  - Decreases the likelihood of inconsistencies for different record types
  - Reduces the number of page layouts you will need when you add new fields to an object

Territory Management

- **Understand Territory limitations per org**
  - Allowed up to 500 Territories out of the box
  - Can request an increase for Salesforce.com
- **Reason**
  - If the org will be expanded to new business units or countries, it is important to understand what Force.com limitations will affect the expansion
  - You may request extensions to this limit but they will have an effect on system performance

Territory Management – Continued

- **Build the territory hierarchy before building the role hierarchy**
- **Reason**
  - Role Hierarchy should mirror the territory hierarchy for all levels
  - This is not SFDC best practices but it is Veeva best practice
  - Design is different from how SFDC does things especially when you get into integrations in this area

Territory Management – Continued

- **Add the Territory Field Viewer S-Control (Account_Territory_Info) to the account page**
  - Allow users edit territory specific information for the user's territory
    - Such as rep specific call targets
- **Reason**
  - Problems with the out-of-the box territories on the account page
  - Access to territory fields is controlled by the parent
  - Users with access to the account can update any other user's territory fields' records
    - Only the owner of the territory should be able to edit the Territory Fields

Security Profile Management

- **There are several out of the box security profiles provided as a template to base your future security profiles on**
  - Clone and rename them using the naming conventions that take into consideration all the groups that the system will be rolled out to
  - Try to keep the number of profiles to a minimum
  - Rename unused profile with z_ to move them out of your way
- **Example**
  - Primary Care Sales – Verteo
  - Specialty Sales = Verteo
  - MSL – Verteo
- **Helps to organize the profiles**

Renaming Veeva Tabs

- **It is highly recommended not to rename Veeva tabs**
  - If you choose to do it, be careful and make sure you change the values in Veeva messages too
- **Example**
  - If you rename My Schedule Tab to My Call Schedule then you will need to rename the associated Veeva Message named My Calls as well
  - Otherwise, the Add to Schedule button in My Accounts will be affected

Making Child Objects Searchable

- **Make child object data searchable by activating the tab for that object**
  - Common request for users wanting to search for addresses
- **Edit user profiles and make the tabs**
  - Default On – Makes the tab visible for the profile and advanced search
  - Default Off – Makes the tab visible from the All tabs and advanced search
- **Reason**
  - Only the essential Veeva tabs come as displayed out of the box
  - If the tab is hidden, then its data will not display in the search results

Apex Data Loader – External Ids

- **Create an External ID structure to move data from one environment to another such as from dev to test environments**
- **Reason**
  - Salesforce.com creates a unique 18 character salesforce.com ID to identify each record
  - Moving these records to new environments via their salesforce.com ID is not a viable option because the salesforce.com ID is system re-generated in each environment

Apex Data Loader – Sandboxes

- **Create two test sandboxes to ensure that a data migration process is correct**
  - Use the first test sandbox for testing the data for user acceptance
  - Use second environment to test the data migration process before moving it to the production environment
- **Example**
  - Product records from the Product_vod table have been updated in the TST1 environment and approved for migration to PROD
  - Export the modified Product records using the Apex Data Loader

Apex Data Loader – Sandboxes – Continued

- Import the modified records into TST2
- Validate that the updates to the Product_vod table are correct in TST2
- Backup the Product_vod table in PROD
- Repeat the migration process into PROD using the external IDs

- **Reason**
  - Salesforce.com does not have a database roll-back feature so extra care needs to be taken to protect the data integrity of the Production environment

International Language Support

- **Veeva leverages the salesforce.com translation workbench to manage a large majority of its language translations**
  - Needs to be supplemented by creating translations for several Veeva custom objects and mobile configurations
- **Veeva is available in over 20 international languages**
  - Both the translation workbench and Veeva Messages are pre-translated
- **Log a case with Veeva support to enable multiple languages to be set in your system**

International Language Support – Continued

- **Set the base language to build all fields in English even if the environment is rolled out to multiple countries with different languages**

- **Reason**
  - Managing the translations through the translation workbench becomes difficult for system administrators and support when they don't understand what the fields are in the multiple languages
  - Building reports also becomes an administrative overhead if the field labels are all in different languages

Module Summary

- **Discussed the top Administrative things to know**
  - Top Veeva Configuration Rules
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- **Listed Force.com Configuration Best Practices**
  - Modifying, creating, and controlling access to fields
  - Using record types and page layouts
  - Territory management and role setup
  - Security management
  - Creating custom buttons and tabs
  - Using Apex Data Loader
  - Translation Workbench