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

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

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	✓
Phone Number	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
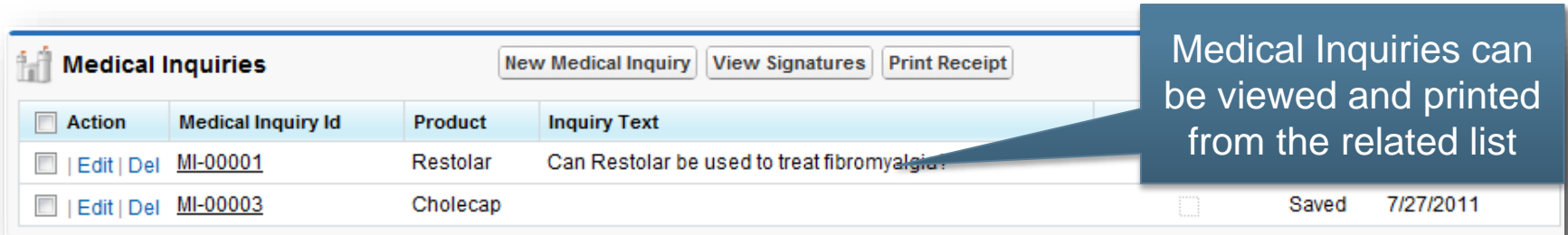
Signature		
Signature Date	Disclaimer	Enter Disclaimer Text Here.

MIRFs – Setup

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

Medical Inquiries can be viewed and printed from the related list

- **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**

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
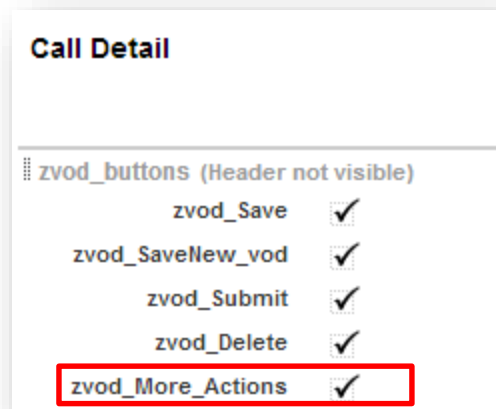
Medical Inquiry Multiple Questions

- **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**

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 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**

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 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**

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

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**

Enhanced Calls from Medical Events

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

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

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
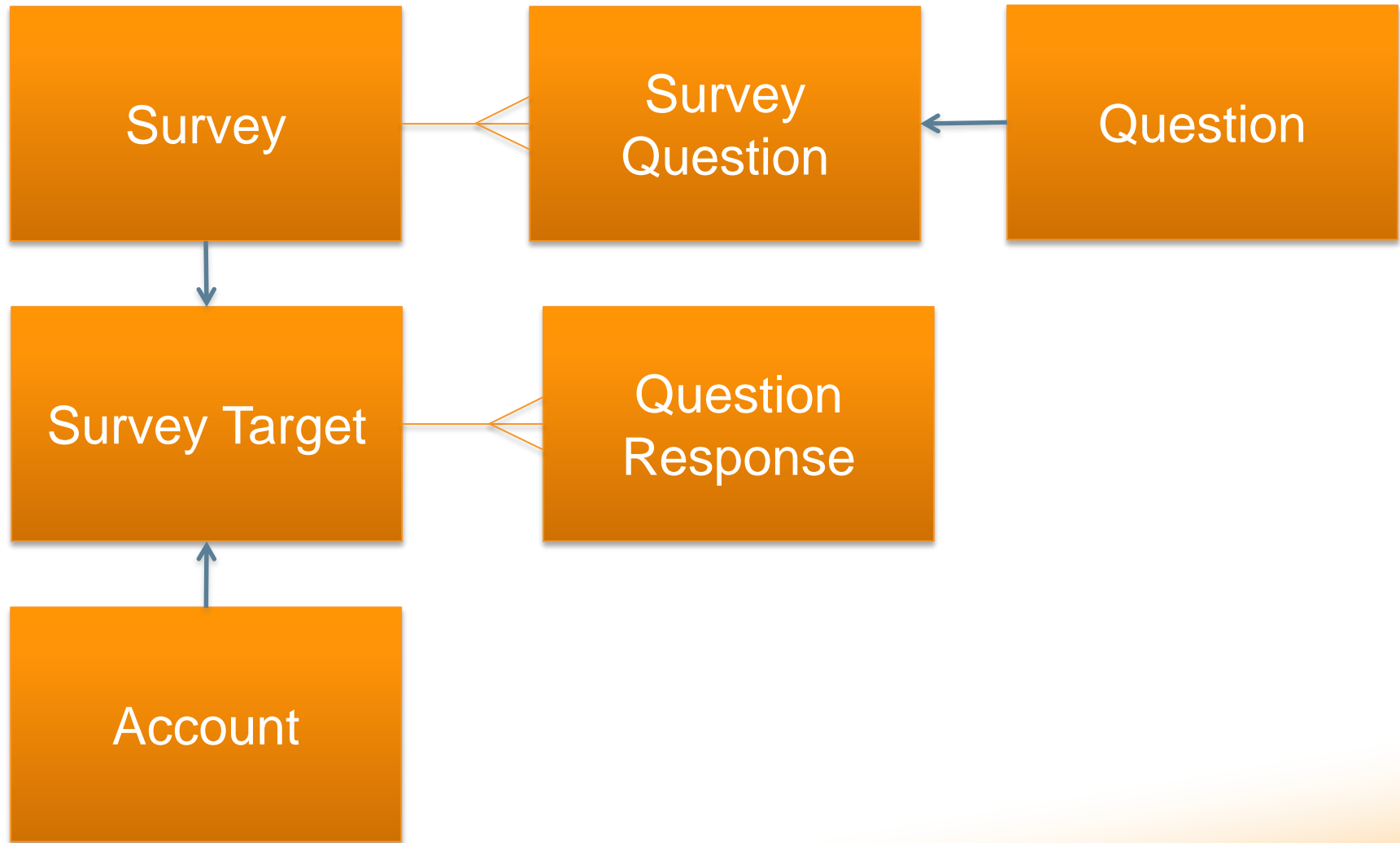
Survey Users

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 Targe**t 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 uses 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

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
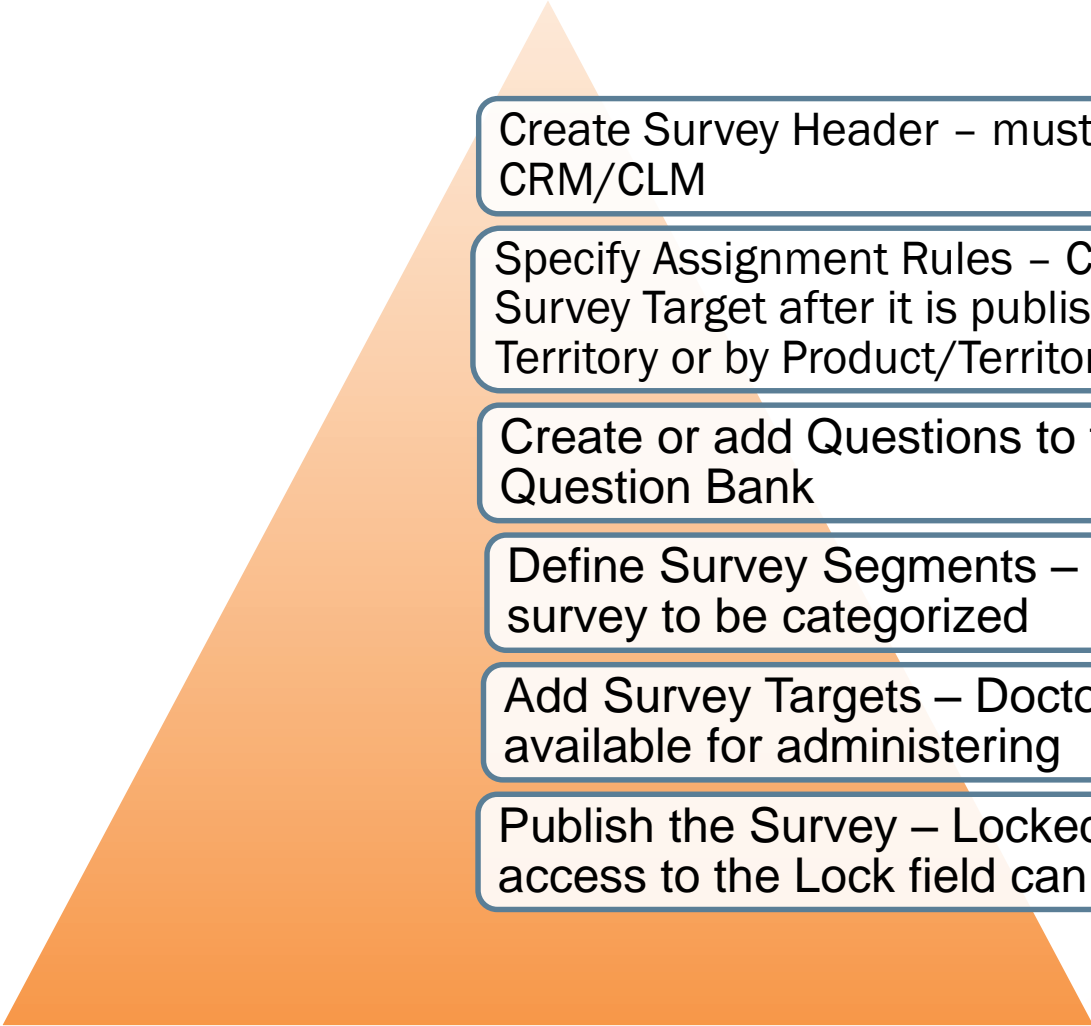
- **Configuration**

  - 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

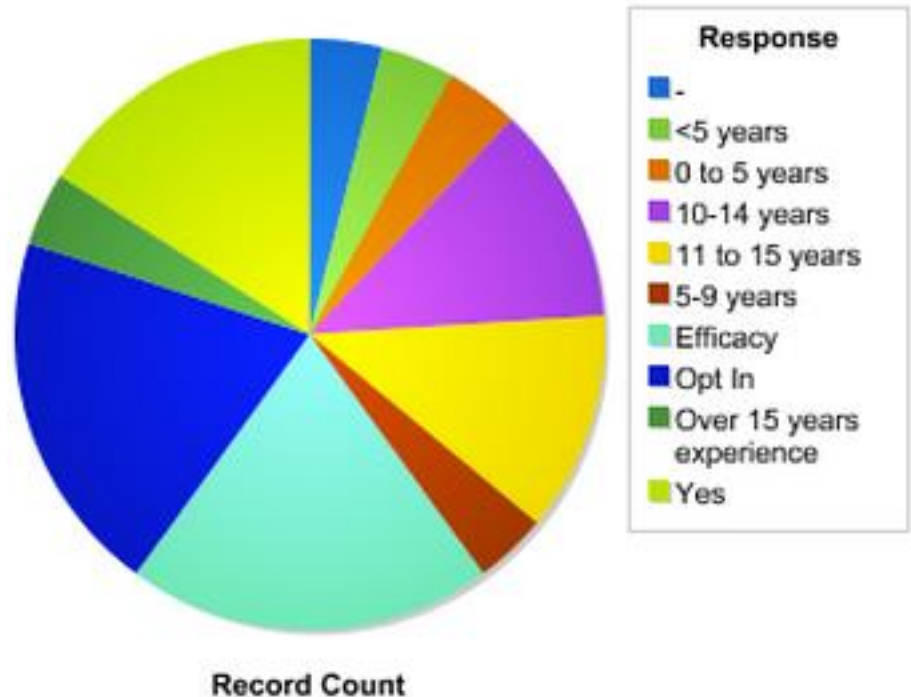Define Survey Segments – allows the results of survey to be categorized

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**

Record Count

Response legend:
- \-
- <5 years
- 0 to 5 years
- 10-14 years
- 11 to 15 years
- 5-9 years
- Efficacy
- Opt In
- Over 15 years experience
- Yes

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**

Medical Inquiries – Sign

- **Tab the sign menu to capture physician's signature**

- **Sign once when capturing multiple Medical Inquiries at the same time**

Medical Events – Create

- **Users can create Medical Events offline**

- **Click Medical Events menu**

- **Tap the + sign and add Medical Event details**
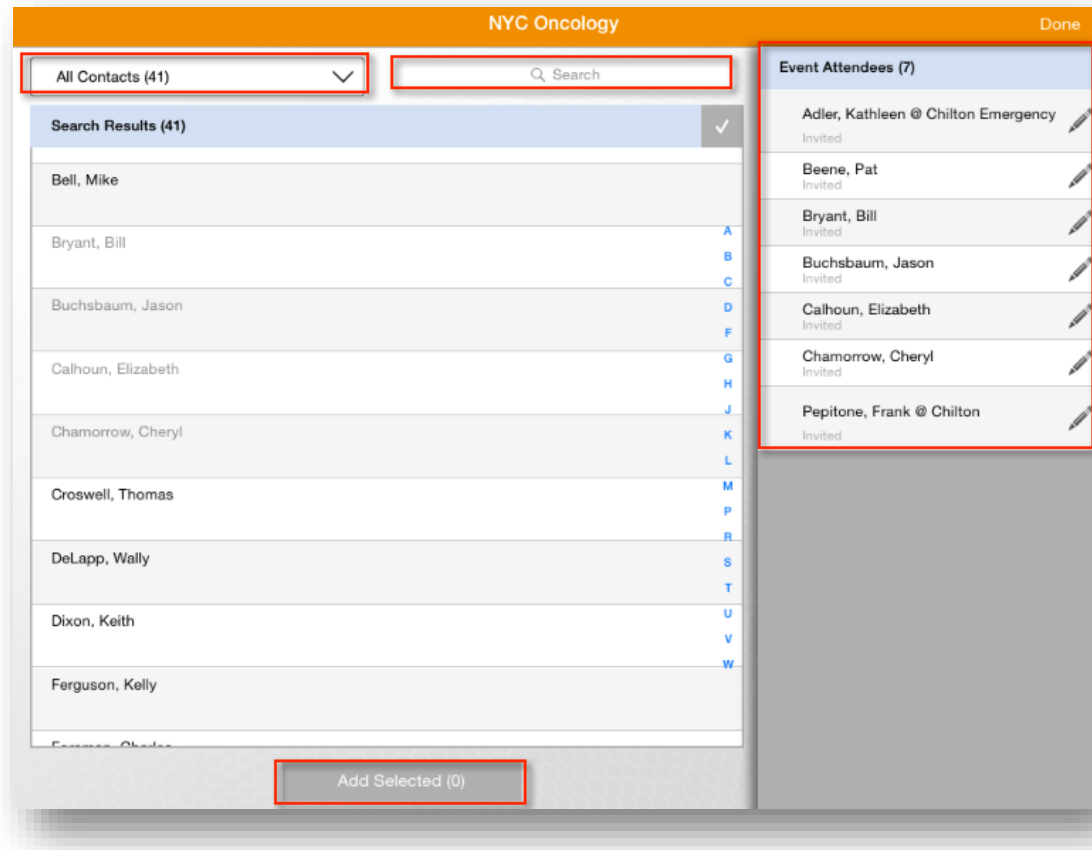
Medical Events – Manage Attendees

- **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

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)

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