Login and Admin Console

Veeva Professional Services

Module Objectives

- **Review typical Veeva Administrator responsibilities**

- **Provide an overview of the Administration Console**

  - Access the Administration Console

  - Describe the main areas of the Administration Console

- **Define Trusted IP Addresses**

- **Grant Login Access**

- **Manage Company Information**

  - Default Language, Locale, and Time Zone

  - User License Information

Veeva Administrator Responsibilities

Administrator Responsibilities

- **Capture and document Veeva configuration requirements**

- **Configure the application to meet requirements**

- **Set up users, profiles, roles, and territory hierarchy**
  - Manage user access to functionality and business data

- **Import business data for application setup**

- **Manage account to territory alignment**

- **Install Veeva CRM to iPad or Windows**

Meeting Requirements with Veeva

Standard

- Use as much standard Veeva functionality as possible
- Veeva provides many standard objects, fields, and logic used to implement common application functionality

Configuration

- When needed, define custom objects, fields, record types and page layouts
- Use Veeva settings to enable or disable functionality
- Automate business processes with validation rules, formulas, approval processes and workflows

Customization

- Developer resource needed
- Only use when requirement can not be configured
- Involves custom code in the form of Visualforce Pages, Triggers, and Apex Classes

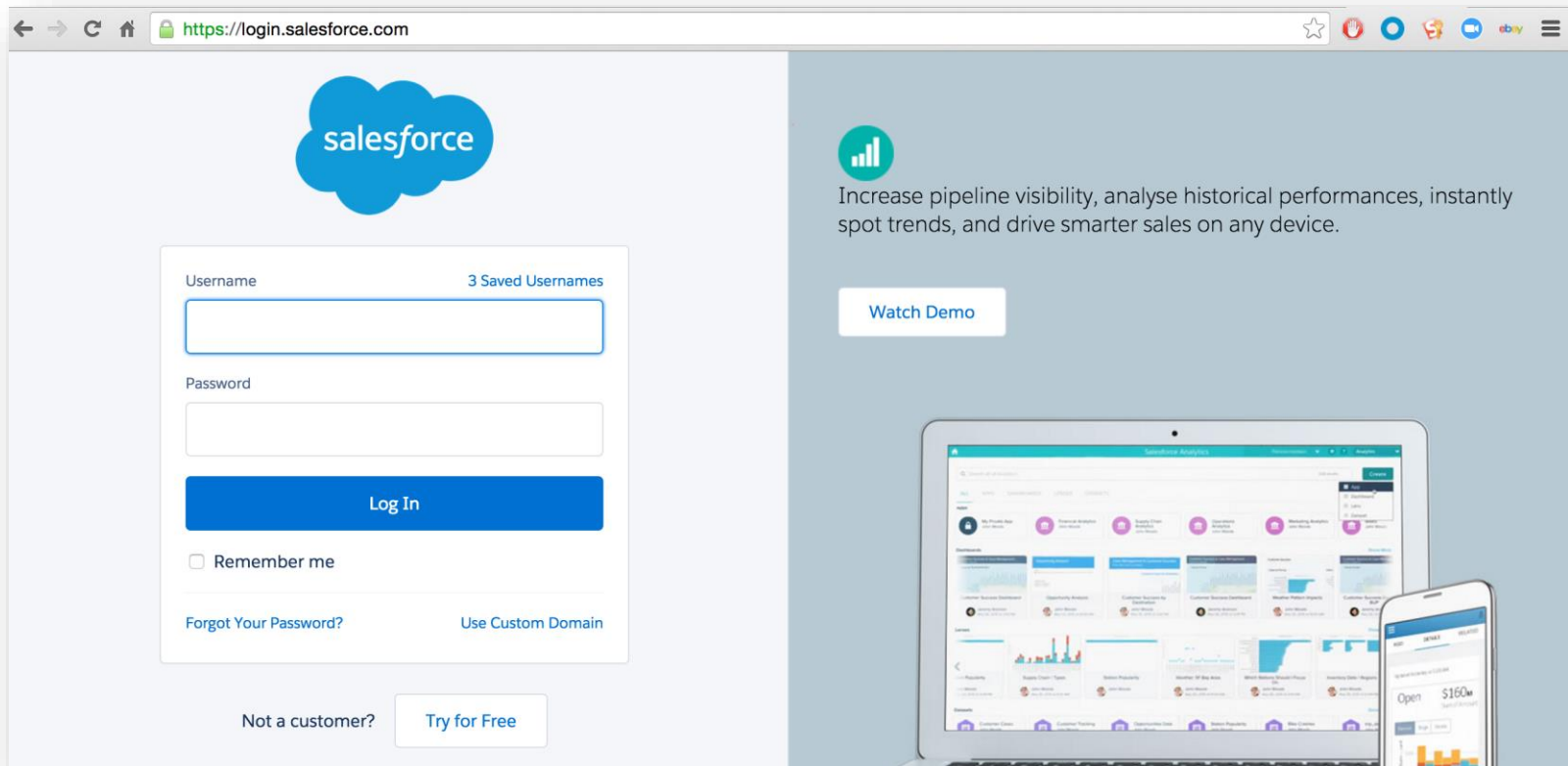# Administration Console Overview

Application Administration Basics

All configuration is done through Veeva CRM online application Configuration Console
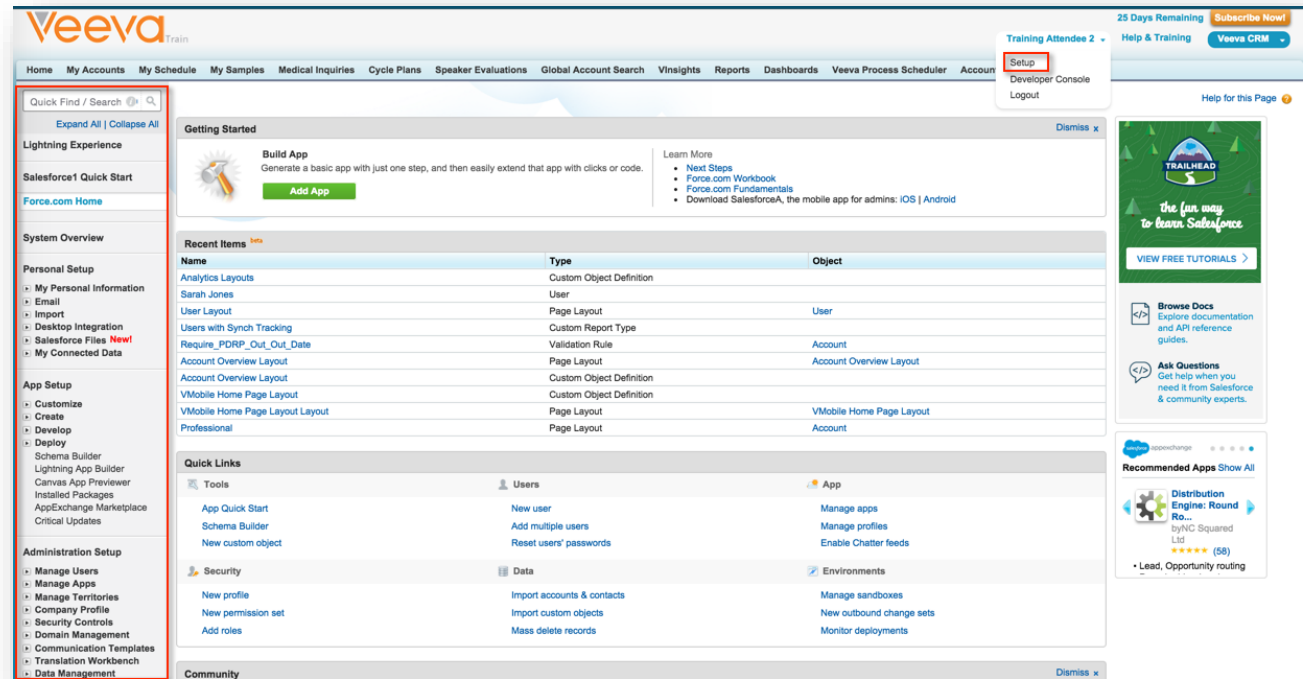
then,

Synchronized to iPad or Windows

Access Veeva

- **Login URL:**

  - https://login.salesforce.com – Production

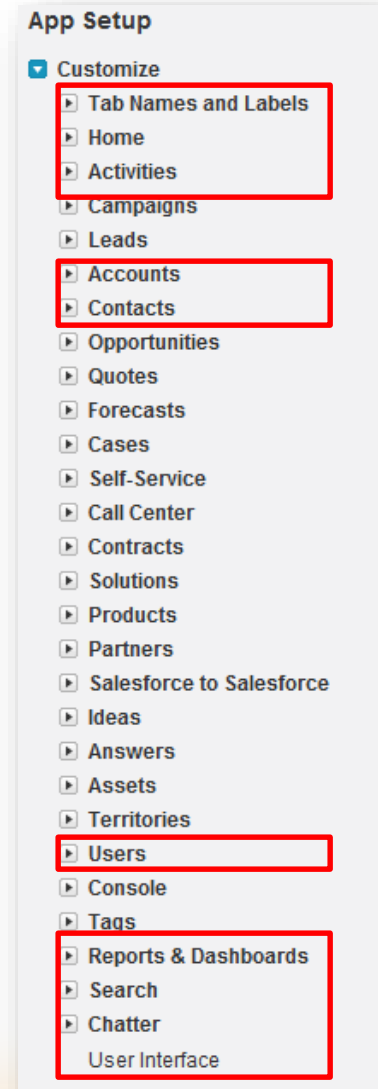 - https://test.salesforce.com – Sandbox

Accessing the Setup Console

- **Log in as an Administrator**

- **User Name → Setup**

- **Setup Console has 3 sets of menus**
  - Personal Setup
  - App Setup
  - Administration Setup

App Setup – Customize

- **Veeva license only allows Administrators to use the highlighted menus under Customize**

  - Tab Names and Labels, Home, Activities

  - Accounts, Contacts

  - Users

  - Reports & Dashboards, Search, Chatter, User Interface

- **Common Veeva configuration is done in the Accounts menu**

- **Opening access to other standard objects is technically possible but requires a change in the license agreements**
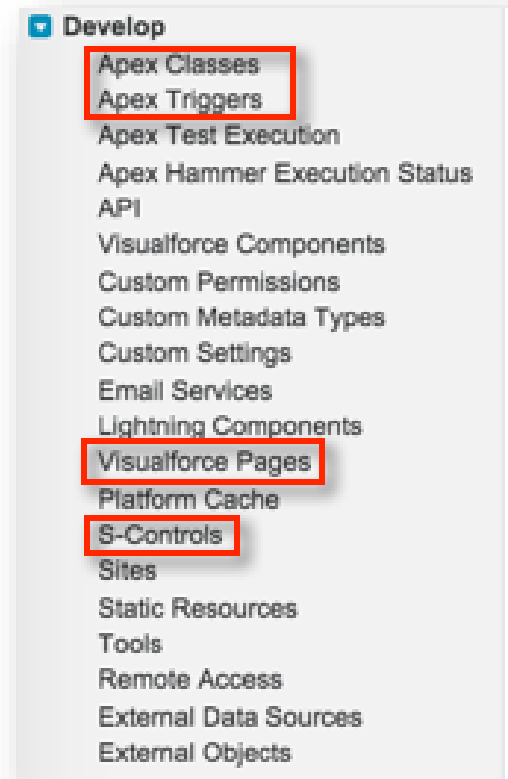

App Setup

☑ Customize
- ► Tab Names and Labels
- ► Home
- ► Activities
- ► Campaigns
- ► Leads
- ► Accounts
- ► Contacts
- ► Opportunities
- ► Quotes
- ► Forecasts
- ► Cases
- ► Self-Service
- ► Call Center
- ► Contracts
- ► Solutions
- ► Products
- ► Partners
- ► Salesforce to Salesforce
- ► Ideas
- ► Answers
- ► Assets
- ► Territories
- ► Users
- ► Console
- ► Tags
- ► Reports & Dashboards
- ► Search
- ► Chatter
- User Interface

App Setup – Develop

- **The Develop menu contains custom Veeva application components such as**

  - Apex Classes

  - Visualforce Pages

  - S-Controls

  - Triggers

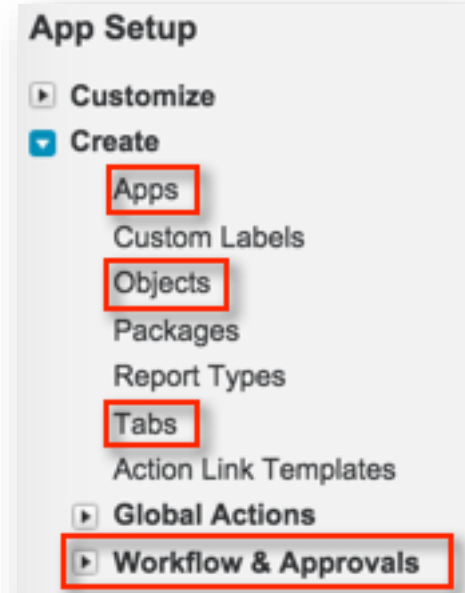- **Examples of Veeva features implemented using these components**

  - Sphere of Influence

  - Office Best Times

  - Product Metrics

  - My Accounts

  - Account Hierarchy

Develop
- Apex Classes
- Apex Triggers
- Apex Test Execution
- Apex Hammer Execution Status
- API
- Visualforce Components
- Custom Permissions
- Custom Metadata Types
- Custom Settings
- Email Services
- Lightning Components
- Visualforce Pages
- Platform Cache
- S-Controls
- Sites
- Static Resources
- Tools
- Remote Access
- External Data Sources
- External Objects

Veeva application components should not be modified

App Setup – Create

- **The Create menu allows Administrators to configure most Veeva functionality**

  - Configuration does not require programming knowledge

- **Common functionality Administrators configure from the Create menu include**

  - Applications – collection of tabs

  - Objects - Veeva specific tables and business logic

  - Tabs – Veeva specific Object, Web, and Visualforce tabs

  - Workflow and Approvals – Automated business processes that can send email alerts, assign tasks, update fields

App Setup

- ▶ **Customize**
- ▼ **Create**
  - Apps
  - Custom Labels
  - Objects
  - Packages
  - Report Types
  - Tabs
  - Action Link Templates
- ▶ **Global Actions**
- ▶ **Workflow & Approvals**

Administration Setup

- **In the Administration Setup section Administrators can access the following menus**

    - Manage Users – Define Users, Roles, and Profiles

    - Manage Territories – Defined the Territory Hierarchy used for Account visibility

    - Company Profile – Access the details for the Org and license information

    - Security Control – Define how data is shared in the application

    - Translation Workbench – Safely change the labels of Veeva application components

    - Data Management – Create sandboxes

Administration Setup

- ▶ Manage Users
- ▶ Manage Apps
- ▶ Manage Territories
- ▶ Company Profile
- ▶ Security Controls
- ▶ Domain Management
- ▶ Communication Templates
- ▶ Translation Workbench
- ▶ Data Management
- ▶ Monitoring
- ▶ Mobile Administration
- ▶ Desktop Administration
- ▶ Salesforce App for Outlook
- ▶ Email Administration
- ▶ Google Apps
- ▶ Data.com Administration

Additional Authentication

Trusted IP Ranges per Org

- **Salesforce.com can be configured to check the IP address of the device being used to connect to Veeva**

    - Implements another layer of authentication besides the username and password

- **To manage this extra layer of authentication the Admin can use one of the following options:**

    - 1 - White-list the IP ranges for the org: Administration Setup → Security Controls → Network Access

    - 2 - White-list all IP ranges to turn off IP authentication for the org by deploying the following package:

    https://login.salesforce.com/packaging/installPackage.apexp?p0=04tF0000000JHh6

Trusted IP Ranges per Profile

- **Administrators can control login access from specific user profiles by specifying a range of IP addresses**

    - When IP address restrictions for profiles is configured, any login from a restricted IP address is denied

- **Go to Setup → Manage Users → Profiles → [profile]**

    - The start and end addresses define the range of allowable IP addresses from which users can log in

Login IP Ranges		New	
Action	IP Start Address		IP End Address
Edit | Del	0.0.0.0		255.255.255.255

Grant Administrators Login Access

- **Gives Veeva Administrators the ability to log in as an end-user**
  - Online application only
  - Useful for troubleshooting and testing new configuration

- **To grant login access go to:**
  - Setup → My Personal Information → Grant Login Access
  - Set the Access Expiration Date to a future date

Grant Login Access

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: **halmeida@veevatrain.com**

Grant Access To	Access Duration
Your Company's Administrator	1 Day (exp. 1/1/2012)
Salesforce.com Support	

✓ --No Access--
1 Day (exp. 1/1/2012)
3 Days (exp. 1/3/2012)
1 Week (exp. 1/7/2012)
1 Month (exp. 1/31/2012)
1 Year (exp. 12/31/2012)
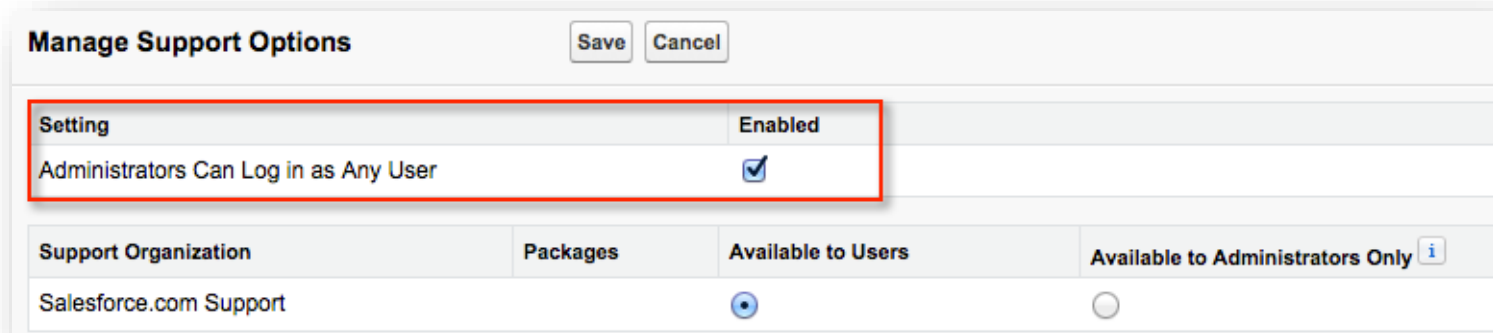
Save   Cancel

Default Administrator Login Access

- **To enable this login access policy:**

  - Go to Setup → Security Controls → Login Access Policies

  - On the Login Access Policies page, enable Administrators Can Log in as Any User

- **Administrators with Modify All Data permission and Delegated Administrators with View Setup and Configuration permission can login as any user**

Login History Audit Trail

- **For security purposes, all login history is tracked in the Audit Trail**

  - Administration Setup → Security Controls → View Setup Audit Trail

Shows when the Administrator logged in and logged out as user

Company Information

Company Information Overview

- **When your company signs up to use Veeva, the information provided during signup is displayed on the Company Information page**

- **The Company Information page allows Administrators to configure:**

  - Primary Contact

  - Default Language, Locale, and Time Zone

  - Find Organization ID – Used for creating support cases

  - Managing User Licenses

  - Setup Currencies

  - Define Fiscal Year

  - Setup Company Holidays

Managing Company Information

- **Administrator can manage company information via:**

  - Setup → Company Profile → Company Information

Viewing User License Information

- **Administrator can view license information by going to:**

    - Setup → Company Profile → Company Information

- **Salesforce – Administrator Licenses**

    - Veeva implementations only use a few of these licenses for Administrator access

- **Salesforce Platform – Veeva Licenses**

    - Each active Veeva end-user users one Salesforce Platform license

User Licenses					User Licenses Help ?
Name	**Status**	**Total Licenses**	**Used Licenses**	**Remaining Licenses**	**Expiration Date**
Chatter External	Active	500	0	500	
Salesforce Platform	Active	20	4	16	
Salesforce	Active	5	2	3	
Salesforce Platform One	Active	5	0	5	
Chatter Free	Active	5,000	0	5,000	
Partner	Active	5	0	5	

Module Summary

- **Reviewed typical Veeva Administrator responsibilities**

- **Provided an overview of the Administration Console**

  - Access the Administration Console

  - Describe the main areas of the Administration Console

- **Defined Trusted IP Addresses**

- **Granted Login Access**

- **Managed Company Information**

  - Default Language, Locale, and Time Zone

  - User License Information

Labs

Login to Veeva

Explore the Administration Setup
Console

Review Company Information