



Cycle Plan Configuration

Veeva Professional Services

Module Objectives

- **Define Cycle Plan (POA)**
- **Set up user profiles to access Cycle Plan functionality**
- **Configure Cycle Plan page layouts**
- **Configure Account page layouts to display Cycle Plan information**
- **Define Cycle Plan custom fields**
- **View Cycle Plans on iPad**



Cycle Plans

- **Lists of targeted accounts and their proposed call activity plan for a distinct time period**
- **Used as a detailed Plan of Action (POA)**
 - Can be created by management
 - Can be created by users and approved by management
- **Tracks Product Details against targeted accounts**
- **Available online and offline via the iPad Scheduler**



Cycle Plans

- Cycle Plans can be accessed online from the Cycle Plans tab
 - Create a custom tab to display Cycle Plans if one does not exist

Cycle Plan Target

New Target

Apply List

Schedule Calls

☒ My Calls

☐ Total Calls

<input type="checkbox"/>	Action	Target	My Calls					Cholecap				Restolar			
			A	P	S	%	Rs	A	P	S	%	A	P	S	%
<input type="checkbox"/>	Edit Del	Carmen Buenuelos	0	1	1	0%	0		2	0	0%		2	0	0%
<input type="checkbox"/>	Edit Del	Chilton Memorial Hospital	0	3	1	0%	2	0	2	0	0%	0		0	0%
<input type="checkbox"/>	Edit Del	CIGNA HealthCare of Arkansas	0	4	2	0%	2	0	2	0	0%	0		0	0%
<input type="checkbox"/>	Edit Del	Clinton Ackerman	1	5	4	20%	0	0	3	0	0%	0	2	0	0%
<input type="checkbox"/>	Edit Del	Enrico Orlandoni	0	4	2	0%	2	0	0	0	0%				
<input type="checkbox"/>	Edit Del	Jorge Almoquera	1	4	3	25%	0			0	0%			0	0%
<input type="checkbox"/>	Edit Del	Kathleen Adler	0	4	2	0%	2	0	0	0	0%	0		0	0%
<input type="checkbox"/>	Edit Del	Michael Burzio, Md	0	3	2	0%	1			0	0%			0	0%
<input type="checkbox"/>	Edit Del	Miller & Miller	0	3	2	0%	1			0	0%			0	0%
<input type="checkbox"/>	Edit Del	Natalia Alonso	1	4	2	25%	1			0	0%			0	0%
<input type="checkbox"/>	Edit Del	Sergio Alonso	0	3	1	0%	2			0	0%			0	0%
total:		11	3	38	22	8%		0	9	0	0%	0	4	0	0%

Actual, Planned, and Scheduled

My Calls				
<u>A</u>	<u>P</u>	<u>S</u>	<u>%</u>	<u>Rs</u>

A = Actual Calls

- Number of calls the user has *submitted* to date against his/her targeted accounts
- Updated real time (iRep and online)

P = Planned Calls

- Number of calls the user is *supposed* to make during the Cycle Plan's time period
- Entered by Manager or Sales Rep

S = Scheduled Calls

- Number of calls *scheduled* by the user in My Schedule against the Cycle Plan Target
- Updated via nightly process

% = Percentage Attainment

- Progress toward scheduled calls (Actual Calls / Planned Calls)

Rs = Remaining Scheduled

- Count of calls remaining to be scheduled

Cycle Plans – Where Used

■ Cycle Plans are visible in 4 places in Veeva

Cycle Plan tab	Account Profile page	iPad Home Page	iPad Weekly Scheduler
<ul style="list-style-type: none">• Shows all the cycle plans tied to the user's territory• Shows the entire plan across all targeted accounts and details	<ul style="list-style-type: none">• Shows a summary of the current cycle plan activity for the account	<ul style="list-style-type: none">• Shows a graphical summary of the current cycle plan• Shows the progress for the user	<ul style="list-style-type: none">• Cycle Plan information is available on iRep when using the weekly scheduler or the one-touch scheduler• Read-Only



Cycle Plans – Configuring User Profiles

If creating Cycle Plans

- Users need full CRUD permissions on Cycle_Plan_vod object

If adding targets to Cycle Plans

- Users need full CRUD permissions on Cycle_Plan_Target_vod object

If relating products detailed on Calls back to Cycle Plan Targets

- Users need Edit permissions on Cycle_Plan_Detail_vod object

Enable Visualforce page security access

- View_Cycle_Plan_vod
- Edit_Cycle_Plan_vod



Cycle Plan Page Layout

■ Configure the Cycle Plan page layout

- Setup → Create → Objects → Cycle Plan → Page Layouts → click the Edit link for the Cycle Plan Layout

Cycle Plan Detail

Standard Buttons

Custom Buttons

EditDeleteCloneSharingSubmit

Information (Header visible on edit only)

*

●

Name

Sample Name

*

●

Start Date

8/16/2011

*

●

End Date

8/16/2011

Owner

Sample User

External Id

Sample External Id

*

●

Territory

Sample Territory

Active

☒

🔒

Remaining

57,556

System Information (Header visible on edit only)

🔒

Created By

Sample User

🔒

Last Modified By

Sample User


Custom Links (Header visible on edit only)

✕🔑

Cycle Plan Targets

New

Target	City	Actual Calls	Actual Total Calls	zvod Display Product Details	Total Attainment	Attainment
Sample Target	Sample City	866	45,962	<input checked="" type="checkbox"/>	30,487%	10,071%



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Cycle Plan Page Layout Configuration

- Add needed fields to the Cycle Plan Detail section
 - Start Date / End Date
 - Active – Only active Cycle Plans will display offline
 - Territory
 - Remaining

Cycle Plan Sample

Cycle Plan Detail

Standard Buttons

Edit Delete Clone Sharing

Custom Buttons

Submit

Information (Header visible on edit only)

* ● Name

Sample Name

* ● Start Date

8/16/2011

* ● End Date

8/16/2011

Active

✓

Owner

Sample User

External Id

Sample External Id

* ● Territory

Sample Territory

Remaining

27,519



Cycle Plan Page Layout Configuration

- **Configure the Cycle Plan Targets related list:**

- On the Cycle Plan page layout, click the wrench button to open the Cycle Plan Targets related list properties window
- Add / remove fields as needed

The image shows two overlapping windows. The background window is titled 'Cycle Plan Targets' and contains a table with columns 'Target', 'City', and 'Actual'. The foreground window is titled 'Related List Properties - Cycle Plan Targets' and contains a configuration interface for the related list.

Related List Properties - Cycle Plan Targets

[Help](#) ?

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields	
Created By	Add ▶ Remove ◀	Target	Up ▲ Down ▼
Created By Alias		City	
Created Date		Actual Calls	
External ID		Actual Total Calls	
Last Modified By		zvod Display Product Details	
Last Modified By Alias		Attainment	
Last Modified Date		Total Attainment	

Cycle Plan Page Layout Configuration

- In Cycle Plan Target related list
 - Remove Name field (displays an auto number)
 - Add Target (Cycle_Plan_Account_vod) field instead to display the Account name

Cycle Plan Targets						
New						
Target	City	Actual Calls	Actual Total Calls	zvod Display Product Details	Total Attainment	Attainment
Sample Target	Sample City	866	45,962	<input checked="" type="checkbox"/>	30,487%	10,071%



Cycle Plan Page Layout Configuration

- To display product level call activity, add the `zvod_Display_Product_Details` marker field as a column to the `Cycle_Plan_Target` related list

Cycle Plan Targets						
New						
Target	City	Actual Calls	Actual Total Calls	zvod Display Product Details	Total Attainment	Attainment
Sample Target	Sample City	866	45,962	<input checked="" type="checkbox"/>	30,487%	10,071%

- 3 columns appear for each product selected on a user's My Setup tab:

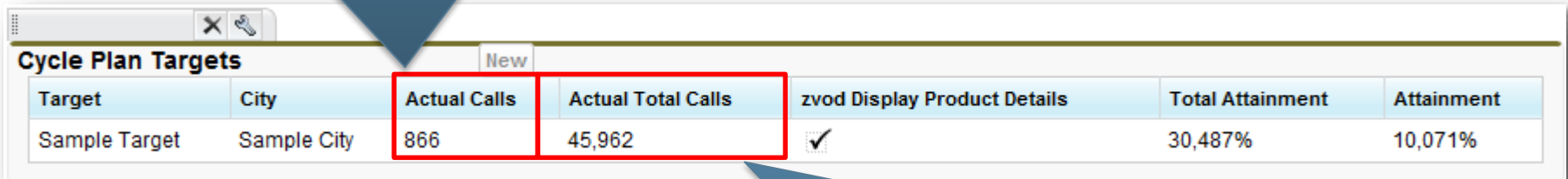
- Actual
- Planned
- Attainment %

My Calls				AMX				Restolar				XYKEX			
A	P	S	%	A	P	S	%	A	P	S	%	A	P	S	%
0	3	0	0%	0	0	0	0%	0	0	0	0%	0	0	0	0%

Cycle Plan Page Layout Configuration

To track total number of Planned and Actual Calls for current user: display **Actual Calls** field on Cycle Plan Targets related list

- Adds Planned Calls and Attainment fields to related list



The screenshot shows a 'Cycle Plan Targets' related list. A red box highlights the 'Actual Calls' and 'Actual Total Calls' columns. The table has the following structure:

Target	City	Actual Calls	Actual Total Calls	zvod Display Product Details	Total Attainment	Attainment
Sample Target	Sample City	866	45,962	<input checked="" type="checkbox"/>	30,487%	10,071%

To track total number of Planned and Actual Calls for entire team (all users): display **Actual Total Calls** field on Cycle Plan Targets related list

- Adds Total Planned Calls and Total Attainment fields to related list



Cycle Plan Target Page Layout Configuration

- Add buttons to the Cycle Plan Target page layout:
 - New Target button to add a new Account to Cycle Plan Targets
 - Apply List button to insert Accounts from an Account List
 - Schedule Calls button to schedule calls for selected Accounts

The screenshot shows a web interface for configuring the 'Cycle Plan Target' page layout. At the top is a header bar labeled 'Cycle Plan Target Sample'. Below it is a section titled 'Cycle Plan Target Detail'. To the right of this title are two groups of buttons: 'Standard Buttons' containing 'Edit', 'Delete', and 'Clone'; and 'Custom Buttons' containing 'New Target', 'Apply List', and 'Schedule Calls'. The 'Custom Buttons' group is highlighted with a red rectangular box. Below the buttons is a section titled 'Information (Header visible on edit only)' which contains a list of fields and their values: a red star icon next to 'Cycle Plan' with the value 'Sample Cycle Plan', a red star icon next to 'Target' with the value 'Sample Account', 'Planned Calls' with the value '594', and 'Planned Total Calls' with the value '50,614'.

- Use Field Level Security on the Lock_vod field in the Cycle Plan object to allow only System Administrators to unlock Submitted Cycle Plans



Cycle Plan Targets – Custom Fields

- Define custom Cycle Plan Target fields to display information from Account, Address, and Territory Field objects

Cycle Plan Target

New Target

Apply List

Schedule Calls

My Cal

<input type="checkbox"/>	Action	Target	City	My Calls				
				A	P	S	%	Rs
<input type="checkbox"/>	Edit Del	Carmen Buenuelos	Madrid	0	1	1	0%	0
<input type="checkbox"/>	Edit Del	Chilton Memorial Hospital	New York	0	3	1	0%	2
<input type="checkbox"/>	Edit Del	CIGNA HealthCare of Arkansas	Phoenix	0	4	2	0%	2
<input type="checkbox"/>	Edit Del	Clinton Ackerman	Newton	1	5	4	20%	0
<input type="checkbox"/>	Edit Del	Enrico Orlandoni	Lake Hopatcong	0	4	2	0%	2
<input type="checkbox"/>	Edit Del	Jorge Almoquera	Madrid	1	4	3	25%	0
<input type="checkbox"/>	Edit Del	Kathleen Adler	Newton	0	4	2	0%	2
<input type="checkbox"/>	Edit Del	Michael Burgo, Md	Wayne	0	3	2	0%	1

Cycle Plan Targets – Custom Fields

- Create the needed marker field in the Cycle Plan Target object with the following naming convention:

- `zvod_[Object Reference]_[Field Name]`

ADDRESS, ACCOUNT, or TSF

Example: City_vod

- `zvod_ADDRESS_City_vod` to display City from the Address object
 - Data type must match the data type of the corresponding field
 - Add the custom field to the Cycle Plan Targets related list in the Cycle Plans Layout
- Fields from the Address object will display based upon Preferred Address (or Primary Address if Preferred Address does not exist)
- Field from the TSF object will display based on the matching TSF between Cycle Plan Territory and Account



Cycle Plan – Product Detail Custom Fields

- Define custom field(s) in the Cycle Plan Detail object to display Product Metrics information for products in the Cycle Plan

New Target		<input checked="" type="radio"/> My Calls					<input type="radio"/> Total Calls		
Target	City	My Calls					AMX	CABASES	Cholecap
		A	P	S	R	Rs	<u>Product Knowledge</u>	<u>Product Knowledge</u>	<u>Product Knowledge</u>
Chilton Memorial Hospital	New York	2	3	0	1	1	High	High	

- See Appendix for configuration details

Display Remaining Call Count

- Display the remaining calls within a Cycle Plan Target
 - Provides a clear measurement of a user's current progress in meeting their target plans
- To enable the remaining calls count:
 - Set ENABLE_CYCLE_PLANS_REMAINING Custom Setting to True
- The (R) column displays instead of Attainment %

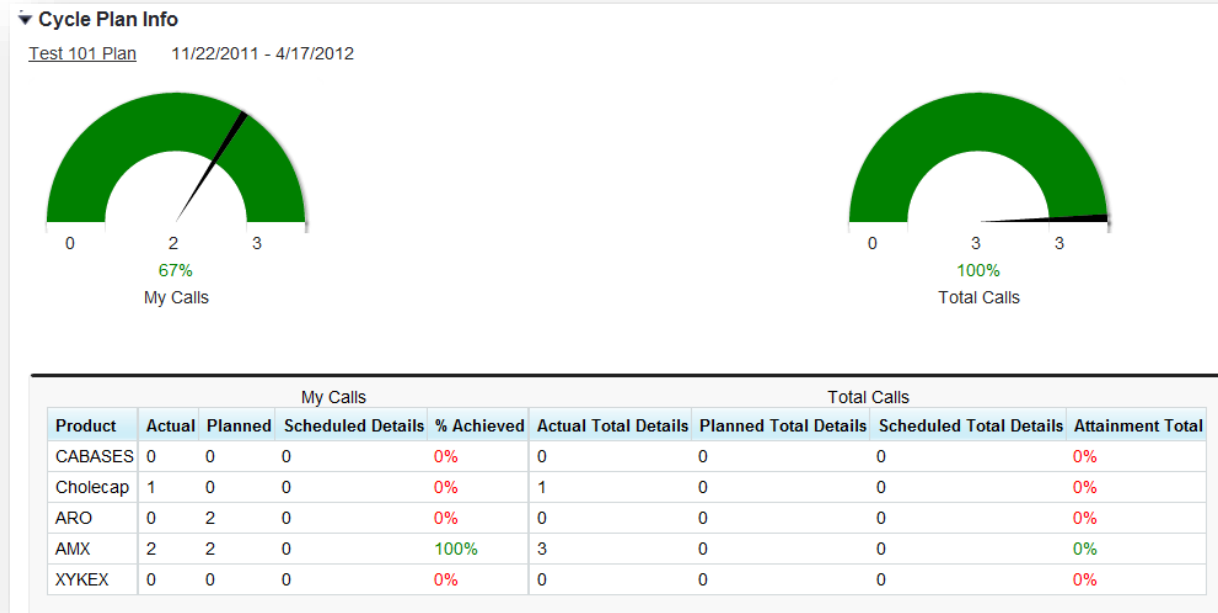
Cycle Plan Target				New Target		Apply List		Schedule Calls	
<input type="checkbox"/>		Target	City	My Calls					
				A	P	S	R	Rs	
<input type="checkbox"/>	Edit	Chilton Memorial Hospital	New York	0	3	1	3	2	
<input type="checkbox"/>	Edit	CIGNA HealthCare of Arkansas	Phoenix	0	4	2	4	2	
<input type="checkbox"/>	Edit	Clinton Ackerman	Newton	1	5	4	4	0	
<input type="checkbox"/>	Edit	Enrico Orlandoni	Lake Hopatcong	0	4	2	4	2	
<input type="checkbox"/>	Edit	Kathleen Adler	Newton	0	4	2	4	2	
<input type="checkbox"/>	Edit	Michael Burgo, Md	Wayne	0	3	2	3	1	
<input type="checkbox"/>	Edit	Miller & Miller	Short Hills	0	3	2	3	1	
total:		7		1	26	15	25		

Remaining =
Planned –
Actual



Cycle Plans on Accounts

- **Display Cycle Plans details on the Accounts page layout**
 - Place the Account_Cycle_Plan_vod s-control on Account page layout(s)
 - User must have an active cycle plan to be displayed
 - The color of the dials and attainment values are controlled by the CYCLE_PLAN_THRESHOLD Veeva Message



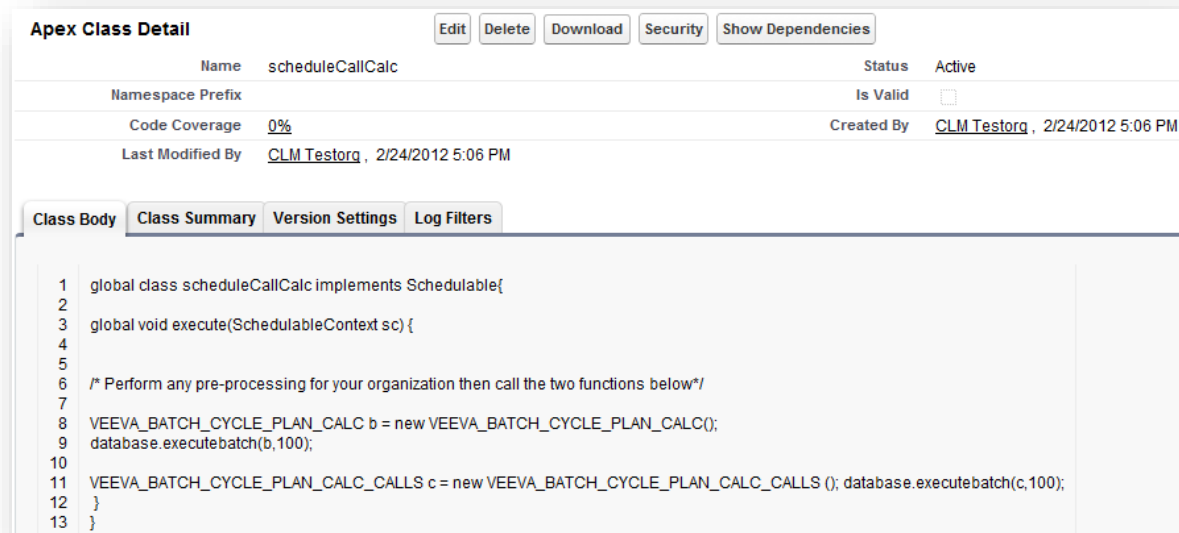
Exclude Products from Cycle Plan

- **Disable specific products from displaying within the Cycle Plan Target**
 - Set the No Cycle Plans field in the Product Catalog to True
- **Applies only to Detail products**

Product Catalog Detail		Edit	Delete	Clone
Product Name	Cholecap	External ID	1001	
Parent Product		Manufacturer	Verteo Biotech, Inc.	
Product Type	Detail	Product info		
Therapeutic Area	Cardiology	Consumer site		
Therapeutic Class	High Cholesterol (Statins)	No Details	<input type="checkbox"/>	
Description		User Aligned	<input type="checkbox"/>	
Sample Quantity		No Cycle Plans	<input checked="" type="checkbox"/>	

Cycle Plan Batch Process

- To update the Cycle Plans so it shows the Total Calls recorded by all Account team members
 - Grant System Admin profile security access to the following 2 classes: VEEVA_BATCH_CYCLE_PLAN_CALC & VEEVA_BATCH_CYCLE_PLAN_CALC_CALLS
 - Create an Apex class that instantiates the two classes above
 - Schedule an Apex class to run nightly during off-peak hours



The screenshot shows the 'Apex Class Detail' page for a class named 'scheduleCallCalc'. At the top, there are buttons for 'Edit', 'Delete', 'Download', 'Security', and 'Show Dependencies'. Below these is a table with the following information:

Name	scheduleCallCalc	Status	Active
Namespace Prefix		Is Valid	<input type="checkbox"/>
Code Coverage	0%	Created By	CLM Testorg , 2/24/2012 5:06 PM
Last Modified By	CLM Testorg , 2/24/2012 5:06 PM		

Below the table, there are tabs for 'Class Body', 'Class Summary', 'Version Settings', and 'Log Filters'. The 'Class Body' tab is selected, showing the following Apex code:

```
1 global class scheduleCallCalc implements Schedulable{
2
3 global void execute(SchedulableContext sc) {
4
5
6 /* Perform any pre-processing for your organization then call the two functions below*/
7
8 VEEVA_BATCH_CYCLE_PLAN_CALC b = new VEEVA_BATCH_CYCLE_PLAN_CALC();
9 database.executebatch(b,100);
10
11 VEEVA_BATCH_CYCLE_PLAN_CALC_CALLS c = new VEEVA_BATCH_CYCLE_PLAN_CALC_CALLS (); database.executebatch(c,100);
12 }
13 }
```

Real Time Calculation

- **Actual (My Calls) values can be configured to update real time**
 - Total Calls (Team Calls) field values updated nightly with a batch process
- **Cycle Plans must be unlocked to allow real time updates**
- **To enable real time calculations set the `CALC_CYCLE_PLANS_REALTIME` Custom Setting to True**
 - If False, My Calls and Total Calls are updated via Apex batch process
- **Supported online and offline**



Real Time Calculation – Veeva Messages

- **CALC_CYCLE_PLANS_REALTIME** – determines which calls to be queried for real time calculation of Actual counts
- **CALC_CYCLE_PLANS_SCHEDULED** – determines which calls to be queried for real time calculation of Scheduled counts



Account Merge – Cycle Plan Target Delete

- **Option to delete the Cycle Plan Target of the account merge loser when two accounts are merged**
 - When a user merges two accounts, if the loser account has a Cycle Plan Target in a Cycle Plan then it also gets deleted
 - The Cycle Plan Detail is also deleted if the Cycle Plan Target is deleted
- **Configuration**
 - Set the CYCLE_PLAN_TARGET_MERGE Multichannel Setting value
 - 0 – default behavior; the Cycle Plan Target of the Account merge loser is not deleted
 - 1 – The Cycle Plan Target of the Account merge loser is deleted

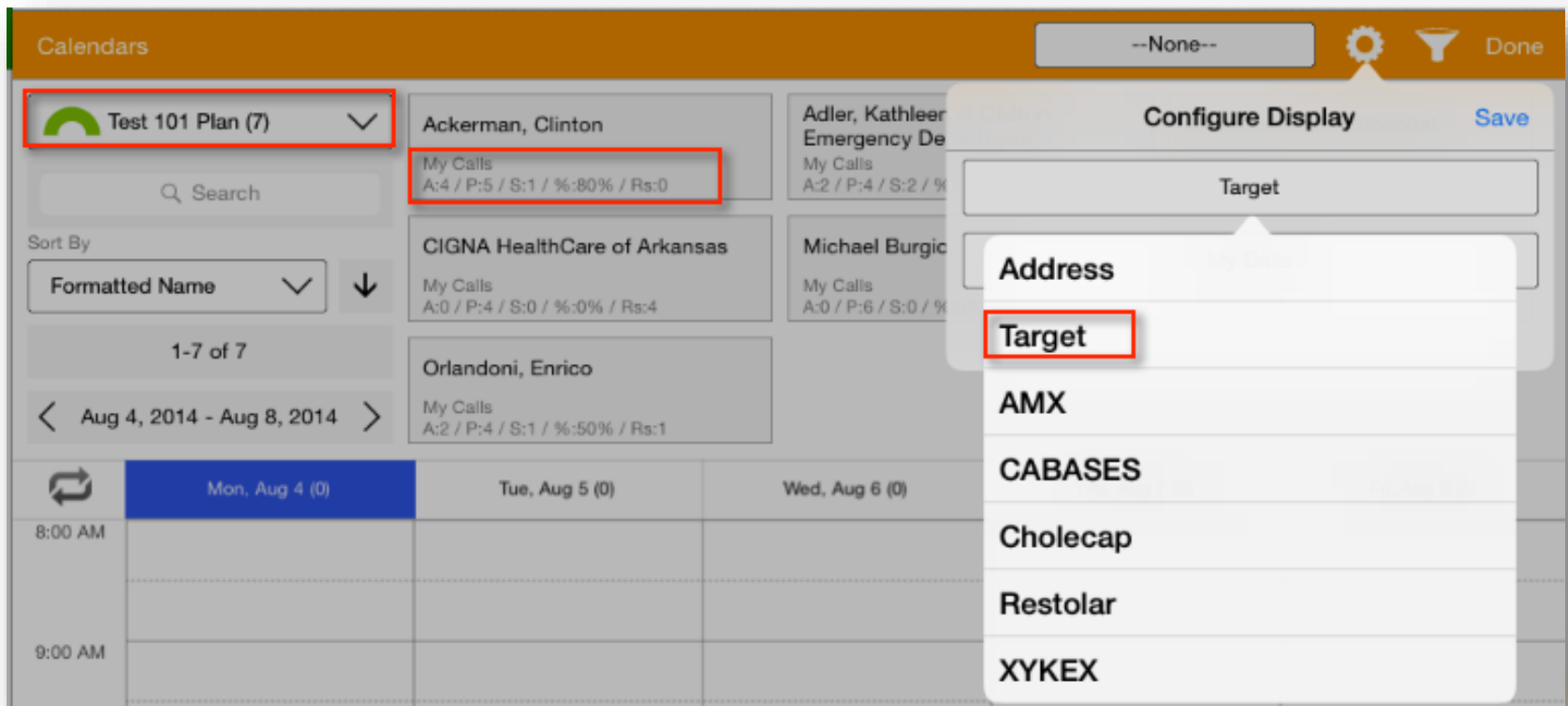


Cycle Plans on iPad



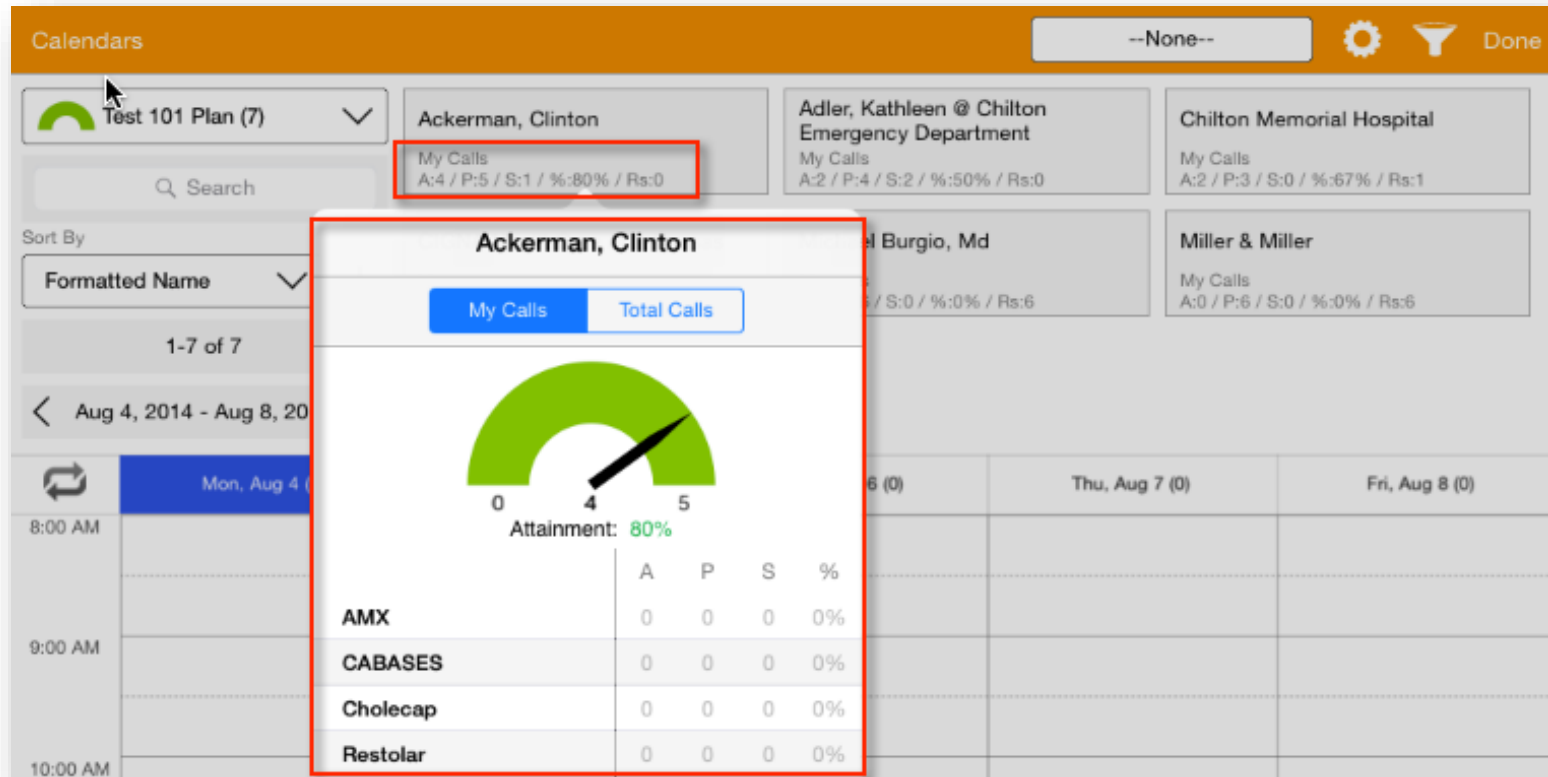
Cycle Plan Info – Week View

- **Cycle Plans can be accessed from the My Schedule on iPad**
 - Users must have an active Cycle Plan for it to display
 - Filter by Cycle Plan



Cycle Plan info – Week View

- Tap an Account to view additional Cycle Plan details



Cycle Plan Info – One Touch Scheduler

- Tap the Scheduler tab and filter by Cycle Plan

Today

Agenda

Week

Scheduler

Cycle

+ Done

Test 1...lan (7) ▾

Q Search

<

August 2014

>

Show weekend ☐

Account	A	P	Rs	R		8/04 (M)	8/05 (T)	8/06 (W)	8/07 (R)	8/08 (F)
	10	32	18	22		0	0	0	0	0
Ackerman, Clinton	4	5	0	1						
Adler, Kathleen @ Chilton Emergency Department	2	4	0	2						
Chilton Memorial Hospital	2	3	1	1						
CIGNA HealthCare of Arkansas	0	4	4	4						
Michael Burgio, Md	0	6	6	6						
Miller & Miller	0	6	6	6						
Orlandoni, Enrico	2	4	1	2						

Module Summary

- **Defined Cycle Plan (POA)**
- **Set up user profiles to access Cycle Plan functionality**
- **Configured Cycle Plan page layouts**
- **Configured Account page layouts to display Cycle Plan information**
- **Defined Cycle Plan custom fields**
- **Viewed Cycle Plans on iPad**



Labs

Configure Cycle Plans

For more information,
see Appendix

Appendix

Cycle Plan – Product Detail Fields



Inherited Fields Configuration

- Create custom field(s) on Product_Metrics_vod object

<u>Knowledge</u>	Knowledge__c	Picklist
------------------	--------------	----------

- Create the associated custom field to desired field in the Product Metrics object in the Cycle_Plan_Detail_vod object

- Follow this naming convention:

- Field Label: As desired
- Field Name: zvod_PM_[Field Name] -- (Not the API Name)

<u>Product Knowledge</u>	zvod_PM_Knowledge__c	Picklist
--------------------------	----------------------	----------

Field Name



Cycle_Plan_Detail Page Layout Configuration

- Create two new sections in the Cycle Plan Detail page layout and name them exactly
 - Cycle_Plan_Detail_vod
 - Total_Cycle_Plan_Detail_vod
- Drag the custom field(s) into the appropriate section on the page layout

Cycle_Plan_Detail_vod	
Product Knowledge	Sample Product Knowledge
Total_Cycle_Plan_Detail_vod	
Training Cycle	<input checked="" type="checkbox"/>
High Prescriber	Sample High Prescriber

Cycle_Plan_Detail Page Layout Configuration

- Field(s) in the Cycle_Plan_detail_vod section are linked to My Calls

Cycle_Plan_Detail_vod

Product Knowledge

Sample Product Knowledge

New Target		<input checked="" type="radio"/> My Calls				<input type="radio"/> Total Calls			
Target	My Calls				AMX	CABASES		Cholecap	
	A	P	S	%	<u>Product Knowledge</u>	<u>Product Knowledge</u>		<u>Product Knowledge</u>	
<u>Chilton Memorial Hospital</u>	2	3	1	67%	High	High			

- Field(s) in the Total_Cycle_Plan_Detail_vod section are linked to Total Calls

Total_Cycle_Plan_Detail_vod

Training Cycle ☒

High Prescriber

Sample High Prescriber

New Target

☐ My Calls
 ☒ Total Calls

Target	Total Calls				AMX		CABASES		Cholecap	
	A	P	S	%	Training Cycle	High Prescriber	Training Cycle	High Prescriber	Training Cycle	High Prescriber
Chilton Memorial Hospital	3	3	1	100%	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>	