



CoBrowse April 2024



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Overview

Veeva CoBrowse is a channel in the Veeva Commercial Cloud that supports remote presentations given by end users. CoBrowse provides customers the ability to interact remotely with HCPs over the internet using only a web browser. HCPs and field personnel click a CoBrowse link from within an email to open a browser window where both the rep and the HCP can view and interact with the same content. Links are unique to the HCP so content can be tailored to the specific Account and allow activity to be tracked back to Veeva CRM to the individual Account for future reporting and analysis.

Note: Participants on mobile devices cannot view videos over CoBrowse.

CoBrowse Platforms

Launching CoBrowse sessions is available on the Online and iPad platforms. Scheduling CoBrowse sessions is available on the Browser platform.

Additional CoBrowse Configuration

After completing the configuration in Setup for CoBrowse and Engage for Portals, complete the additional configuration in this section for CoBrowse.

Vault Configuration

To activate the CoBrowse Content field on the Multichannel Presentation document type:

1. Navigate to Admin > Configuration > Document Fields.
2. Select the appropriate document type that exists in your Vault (the label differs depending on when your Vault was provisioned).



- Engage Presentation
 - Presentation
 - Multichannel Presentation
3. Click **Edit Details**.
 4. Select the **CoBrowse Content** (cobrowse_content__v) field.
 5. Edit the field and ensure the Status is Active.
 6. Click **Save**. If the Call is submitted before it is saved, CoBrowse links are not created.

Select the presentations you want to use as CoBrowse content by setting the CoBrowse Content (cobrowse_content__v) field to Yes.

Note: The content must also be marked as Engage Content (engage_content__v) = Yes.



CRM Configuration



1. Grant the Engage integration user the following permissions:

Object	OLS	Record Types	Fields	FLS
Multichannel_Content_vod	CRUD	n/a	Cobrowse_vod	Edit
Multichannel_Activity_vod	CRUD	Cobrowse_vod	<ul style="list-style-type: none"> • Organizer_vod • Account_vod • Site_vod • Sent_Email_vod • Call_vod • Debug_vod • Session_Id_vod • Territory_vod 	Edit



Object	OLS	Record Types	Fields	FLS
Multichannel_Activity_Line_vod	CRUD	Cobrowse_vod	<ul style="list-style-type: none"> • User_Input_vod • Multichannel_Content_Asset_Version_vod • Multichannel_Content_Asset_Id_vod • Call_vod • Custom_vod • Debug_vod • Event_Subtype_vod • Event_Type_vod • Multichannel_Activity_vod • Multichannel_Content_vod • Multichannel_Content_Asset_vod • Product_vod • Product_VExternal_Id_vod • Sent_Email_vod 	Edit

2. Grant end users the following permissions:



Object	OLS	Record Types	Fields	FLS
Call2_vod	CRU	n/a	<ul style="list-style-type: none"> Cobrowse_MC_Activity_vod zvod_Cobrowse_vod 	Read
			<ul style="list-style-type: none"> Cobrowse_MC_Session_vod Cobrowse_URL_Participant_vod Cobrowse_Presentation_vod Cobrowse_URL_Presenter_vod 	Edit
Content_Deployment_vod	R	n/a	<ul style="list-style-type: none"> Active_vod Expired_vod 	Read
Multichannel_Content_vod	R	n/a	<ul style="list-style-type: none"> Cobrowse_vod Product_vod Expired_vod 	Read
Multichannel_Content_Asset_vod	R	n/a	<ul style="list-style-type: none"> Status_vod Product_vod Detail_Group_vod 	Read



Object	OLS	Record Types	Fields	FLS
Multichannel_Activity_vod	R	Cobrowse_vod	<ul style="list-style-type: none">Organizer_vodAccount_vodSite_vodSent_Email_vodCall_vodDebug_vodSession_Id_vodTerritory_vod	Edit



Object	OLS	Record Types	Fields	FLS
Multichannel_Activity_Line_vod	R	Cobrowse_vod	<ul style="list-style-type: none"> • User_Input_vod • Multichannel_Content_Asset_Version_vod • Multichannel_Content_Asset_Id_vod • Call_vod • Custom_vod • Debug_vod • Event_Subtype_vod • Event_Type_vod • Multichannel_Activity_vod • Multichannel_Content_vod • Multichannel_Content_Asset_vod • Product_vod • Product_VEternal_Id_vod • Sent_Email_vod 	Edit
Site_vod	R		URL_vod	R



3. Ensure the **Cobrowse_vod** record type is active on the Account External ID Map (Account_External_ID_Map_vod__c) object.
4. Activate the iPad VMOC records for the following objects:
 - Multichannel_Activity_vod
 - Multichannel_Activity_Line_vod
 - Content_Deployment_vod

Creating and Modifying Call Records

CRM users who are responsible for scheduling CoBrowse calls must be able to create, update, and edit Call records for the record type reserved for CoBrowse Calls. All CoBrowse sessions result in a Call record being created.

1. Create a new Call Report record type with a new page layout assigned to it. This should be a very basic call report. We recommend you include:
 - Some basic Call information fields
 - The zvod_Detailing_vod field in its own section
 - The zvod_CoBrowse_vod field in its own section
 - Do not include the fields prefixed with CoBrowse_ on the page layout for the Call object, as this configuration is not supported. These fields are displayed automatically by the zvod_Cobrowse_vod field when the Call page displays. They are not required on the page layout.
2. Ensure the CoBrowse user profile has access to create Calls of the new record type.

If ad hoc CoBrowse setup is needed:

- Add the Start_Cobrowse_vod button to any Account page layouts
- Grant the user access to the Cobrowse_vod Visualforce page.



Created Multichannel Activity Records

Multichannel_Activity_vod and Multichannel_Activity_Line_vod records are automatically created during CoBrowse presentations representing interactions by both the presenter and account. When the Multichannel_Activity_vod record represents the presented, the Account_vod and Account_External_Id_Map_vod fields are empty and do not display, since these fields only populate when the record is associated with an account.

Additionally, a Multichannel_Activity_vod record represents a complete session, so there may be multiple Multichannel_Activity_vod records associated to the same account if any session interruptions or disconnects occurred.

Using CoBrowse

- Scheduled CoBrowse Presentations below
- Ad hoc CoBrowse Presentations on page 21
- CoBrowse Content and Browser Limitations on page 22
- Sorting Slides in Thumbnail view on page 22
- Changing Presentations in CoBrowse on page 22

A CoBrowse session can be scheduled in one of two ways, Scheduled or Ad hoc from the Account detail page. Both ways always results in a Call record being created.

You can launch an already scheduled CoBrowse session offline, but you cannot schedule a session while offline.

Scheduled CoBrowse Presentations

To schedule a Scheduled CoBrowse Presentation call from the Call report:



1. Create a Call record for an Account either through the Account record or by scheduling using MySchedule.
2. Ensure the selected record type is specifically for CoBrowse.
3. Select a CoBrowse presentation from the list.
 - The list is filtered from the available CoBrowse Content based on the user's MySetup access and the Account's restricted and allowed products
 - Pressing the Preview button will open a new browser tab which allows the user to review the CoBrowse Content

CoBrowse Meeting
New CoBrowse Meeting

[<< My Schedule](#)

Save Submit Cancel

CoBrowse Meeting

Call Information

Account [Clinton Ackerman](#)

Call Type

Record Type 👉 CoBrowse Meeting ▼

Datetime

CoBrowse Activity 🔍

CoBrowse Scheduling

Select	Preview	Presentation	Product
<input type="radio"/>	🔍	Animal Health - CoBrowse	
<input checked="" type="radio"/>	🔍	Redrock Cholecap Presentation - CoBrowse	Cholecap

Detailing Priority

Common

Restolar

BirdPro

Cholecap

Labrinone

Primary Care Sales

Company Mission

Investigator Studies

Specialty Care Sales

Volunteering

Investigator Studies

Supera

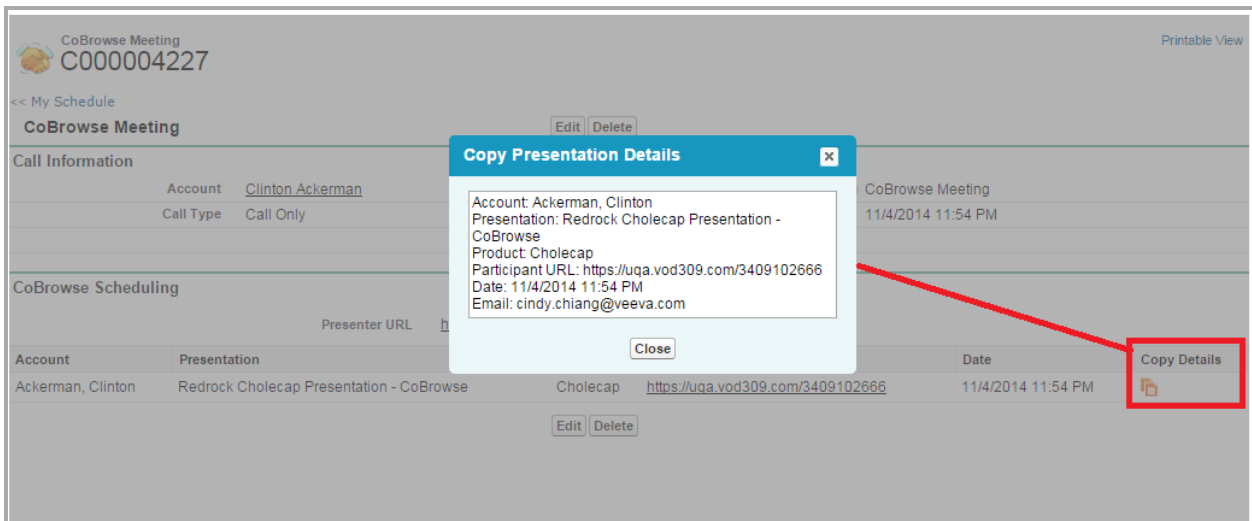
[Add Other...](#)

Save Submit Cancel

4. Enter information for any other relevant sections of the Call Report.
5. Click **Save**.



6. Select **Copy Details** to display a pop-up window that allows easy copy and paste of relevant CoBrowse details. Use this information to share the Participant URL link with the HCP.
 - CoBrowse links only allow one open session at a time. If another window/tab is opened with the same CoBrowse link, the first session ends and displays a black screen.



7. Select the **Click here to send invite** link to send an invitation through Approved Email.

Note: Approved Email must be enabled to use this feature. See Sending Approved Email CoBrowse Invitations for more information.

8. Open the **Presenter URL** link in a new browser window or tab to open the CoBrowse session when it is time to begin the presentation.



CoBrowse Meeting
C000004227 Printable View

<< My Schedule

CoBrowse Meeting Edit Delete

Call Information

Account	Clinton Ackerman	Record Type	CoBrowse Meeting
Call Type	Call Only	Datetime	11/4/2014 11:54 PM

CoBrowse Activity

CoBrowse Scheduling

Presenter URL	https://uqa.vod309.com/mZXPfS
---------------	---

Account	Presentation	Product	Participant URL	Date	Copy Details
Ackerman, Clinton	Redrock Cholecap Presentation - CoBrowse	Cholecap	https://uqa.vod309.com/3409102666	11/4/2014 11:54 PM	

Edit Delete

9. Tap on the **CoBrowse** icon on the top left of the player to open the CoBrowse controls.

- Attendee names display here
- If enabled, Chat displays. Type in the text box and select Enter to send a message to the attendee.
- Participants are able to chat with you at this time, but they do not see any content

Start Presentation

Attendees

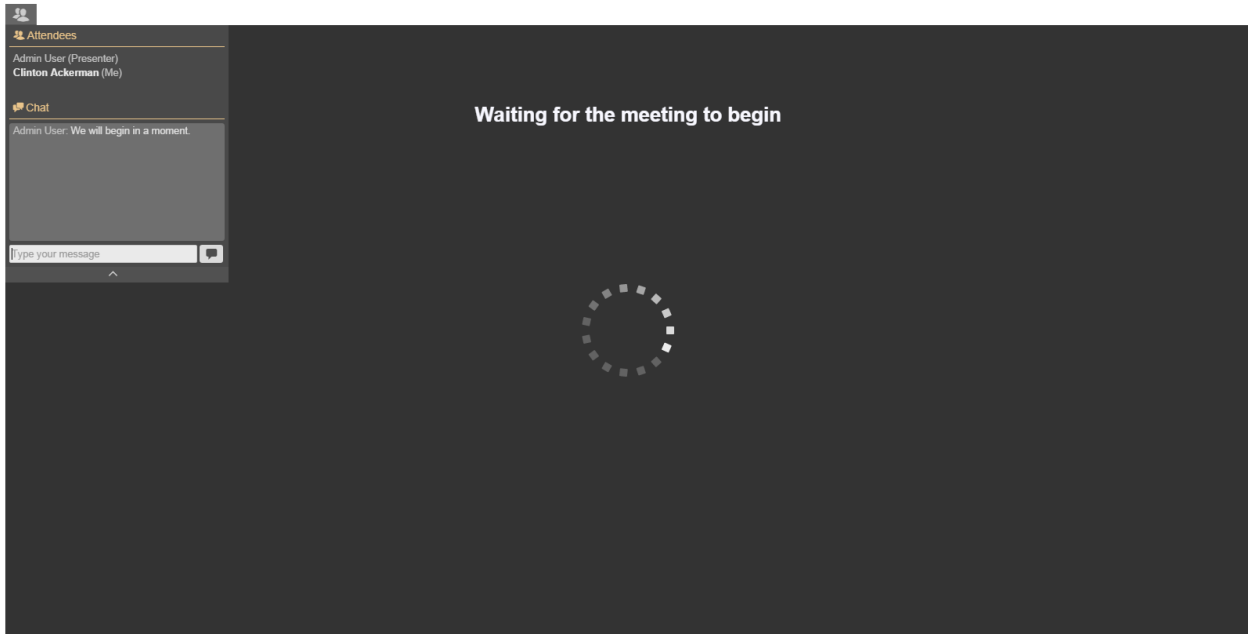
Admin User (Presenter, Me)
Clinton Ackerman

Chat

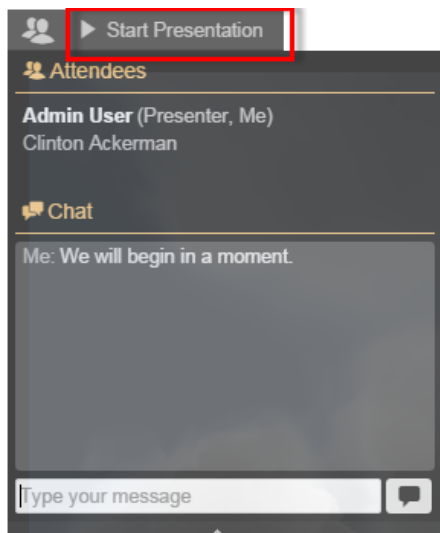
Type your message

NDC 416-16-836-40
Clinton Ackerman
rosuvastatin calcium 20mg tablets
Rx only Prescribe your patients the one thing they really want...
Medication guide included

1 / 4



10. Select **Start Presentation** when you are ready to begin the actual presentation.



11. Use the Engage Media Player controls on the bottom to navigate through the content.

- Thumbnail viewer - selected by the thumbnail icon or the space bar
- Next/Previous arrow



- Full screen button
- Video controls

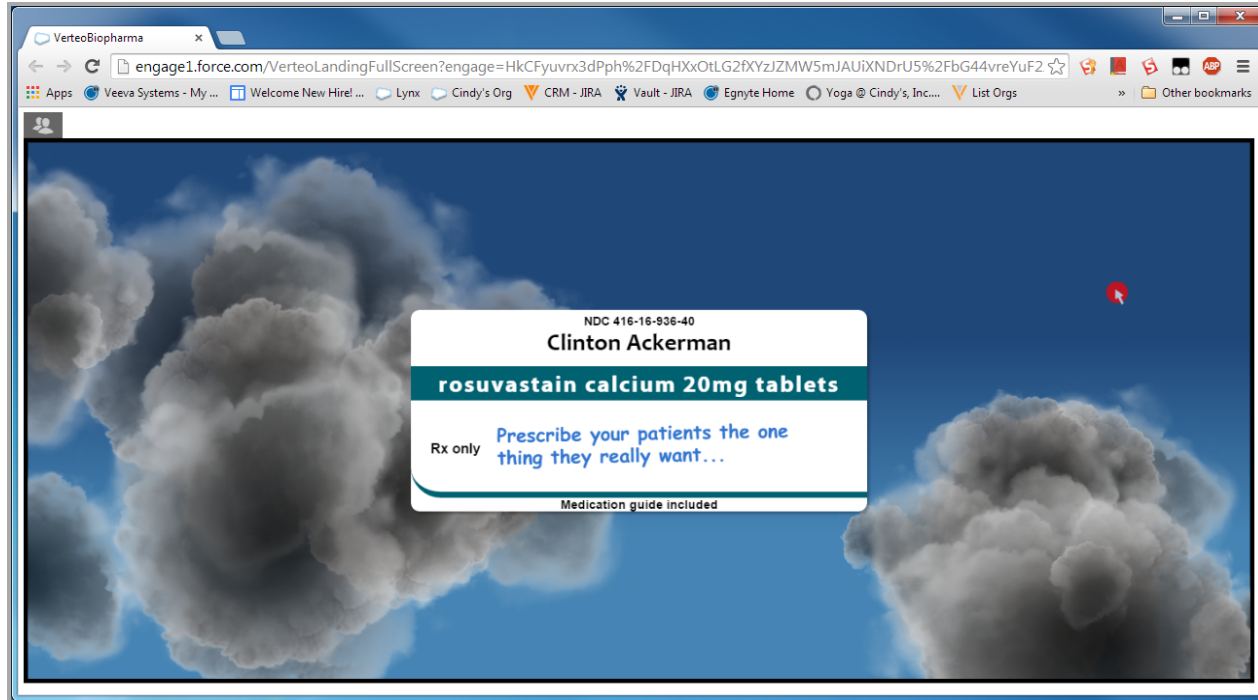
When the presenter selects the thumbnail view, the current slide still displays to the viewer.

When the presenter selects a new slide, that slide then displays to the viewer. Presenters can also search for a particular slide within the thumbnail view.



12. Interact with HTML content.

- As the presenter's mouse is moved, the participants will see a red circle move about the screen



- When the presenter interacts with any elements on the content, the participants will see the interaction/animation occur as well

Note: If browser security settings prevent video content from automatically playing, a message displays directing users to select in order to begin the video.

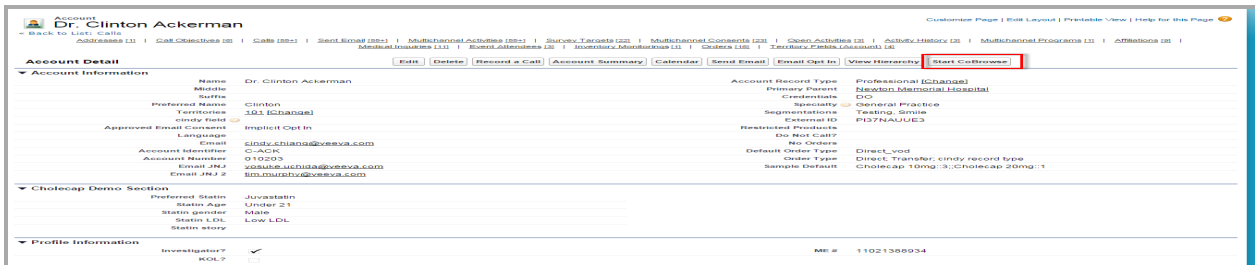
13. Click the Stop Presentation button. Participants see a screen similar to the one in #8.
14. Edit the Call Report
 - Fill in any other relevant details, such as what products were detailed
 - Fill in any other relevant details, such as what products were detailed
15. View what content was displayed during the CoBrowse session. After the Call is submitted, the CoBrowse section of the call report will reflect what was displayed during the presentation.



Ad hoc CoBrowse Presentations

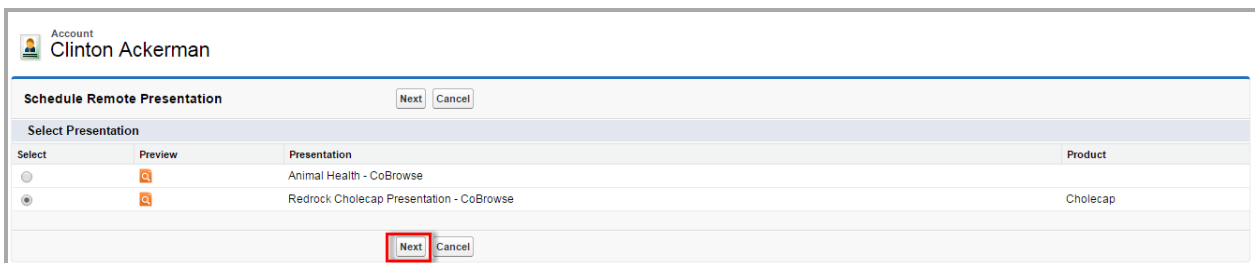
To start an ad hoc CoBrowse session:

1. Navigate to the Account's detail page and select the Start CoBrowse button. This creates a Call using the default CoBrowse record type defined in COBROWSE_DEFAULT_RECORD_TYPE_vod Multichannel Setting in Setup->Develop->Custom Settings.



2. Select a CoBrowse presentation from the list and click **Next**.

- The list is filtered from the available CoBrowse Content based on the user's MySetup access and the Account's restricted and allowed products
- Selecting the Preview button opens a new browser tab that allows the user to review the CoBrowse Content



3. See steps 5 - 12 from the Scheduled CoBrowse Presentations section on how to start the CoBrowse session and how to use the CoBrowse player.
4. Select **Done** to navigate back to the Account detail page.



Account
Clinton Ackerman
Done

Schedule Remote Presentation

Information

Presenter URL <https://uga.vod309.com/2PPEqg>

Account	Presentation	Product	Participant URL	Date	Copy Details
Clinton Ackerman	Redrock Cholecap Presentation - CoBrowse	Cholecap	https://uga.vod309.com/2160194944	11/10/2014 9:34 AM	

Done

Note: Remember to fill out other necessary information on the Call Report and Submit it.

CoBrowse Content and Browser Limitations

For video slides, it is not possible for the Presenter to start a video slide when the Participant is using an iOS device (iPad/iPhone).

Sorting Slides in Thumbnail view

During a presentation, the presenter can select the thumbnail icon or press the space bar to open the thumbnail viewer. The thumbnail view of all slides in the presentation displays to the presenter, while viewers continue to see the slide that was active when the presenter selected the thumbnail viewer. When the presenter selects a slide from the thumbnail viewer, that slide displays to both the presenter and the viewer. The presenter can also search for a slide using the free-text field.

Changing Presentations in CoBrowse

Users now have the ability to view other presentations they have access to when viewing information with HCPs. Users need access to other CoBrowse presentations in order to use this feature.

A Change Presentation link displays after selecting the thumbnail icon in the bottom left corner in the CoBrowse player to indicate the user has the ability to view other presentations. When selected, all presentations the user has access to display as thumbnails which then can be



selected for viewing. Users can also search presentations after selecting the Change Presentation link.

This feature is enabled by default.

Engage PDF Support

PDF is a common file type for delivering content. Customers have requested the ability to include pdfs in their CoBrowse/Engage presentations. For performance reasons, limit pdf documents to a maximum of 100 pages.

When the Engage Media Player encounters a slide of type pdf, the pdf displays inside the player. All Engage Media Player controls/buttons are still visible and enabled.

PDF Viewer Controls

The following pdf viewer controls are available:

- Next Page button - When this button is selected, the next page of the pdf displays. This button is disabled if the user is on the last page of the pdf.
- Previous Page button – When this button is selected, the previous page of the pdf displays. This button is disabled if the user is on the first page of the pdf.
- Jump to Page control – The user can jump to a specific page by typing a page number in the text box and selecting Enter

Tracking

Viewing a pdf slide creates a Multichannel Activity record. A Multichannel Activity record is also created for each of the following:

- Total number of pages in the pdf
- Total number of pages viewed
- List of viewed pages



Engage Integration users need to have Write access to the new fields.

Creating CoBrowse Content

Images, Videos, and PDF Slides

CoBrowse/Engage for Portals supports images, videos, and PDF slides. CoBrowse presentations can contain a maximum of 300 slides.

- Images - Images can be created using any Vault support format at any resolution size and aspect ratio. When uploaded to Vault, images are converted to and display in the Engage player as .JPG files.
 - If the player is larger than the image, the image displays with black borders
 - If the player is smaller than the image, the image resizes to fit inside the player
 - In fullscreen mode, the image expands to fit the screen while retaining the aspect ratio
 - Images display at 800 x 600 resolution
- Videos – Videos should be created using any Vault-supported format at 720p and at any aspect ratio. When uploaded to Vault, videos are converted to .mp4 files and are encoded to different bit rates. The Engage player automatically selects the best bit rate for the connection speed.
 - If the player is larger than the video, the video displays with black borders
 - If the player is smaller than the video, the video resizes to fit inside the player
 - In fullscreen mode, the video expands to fit the screen while retaining the aspect ratio



- PDFs - Any document type for which Vault generates a Viewable Rendition can be used as a PDF slide
 - PDF is a common file type for delivering content
 - PDFs can be included in CoBrowse/Engage presentations
 - Limit PDF documents to 100 pages for best performance
 - When the Engage player encounters a PDF slide, it automatically resizes the PDF content to fit inside the player. The PDF displays with all player controls and buttons enabled.

Note: Fullscreen mode is limited to the following browsers: Chrome for Android, Chrome for desktop browsers, Firefox (laptop only), Safari (laptop only), and IE11 (laptop and surface).

To add images, videos, and PDF slides:

1. Upload the content directly into Vault as a Multichannel Slide document type.
2. Set the Engage Content field to Yes.
3. Select an option from the CRM Media Type picklist: Image, PDF, Video, or HTML.

Vault automatically creates and packages necessary files (including the poster and thumbnail) from the source document.

Building Multichannel HTML Content

Users can develop one piece of content that can be used across channels. However, it may not always be practical or cost effective to invest in HTML content that works identically on all platforms--especially when deploying content over the web to HCPs using Engage for Portals or CoBrowse.



HCPs use many different web browsers, and older browsers, such as Internet Explorer 8, are still commonly used in many healthcare organizations and private practices. Older browsers cannot display rich HTML5 content developed for Veeva CLM on iPad or Windows.

Cross-Browser Development Approaches

Web browsers have differing levels of compliance with HTML, CSS and JavaScript standards. Most modern browsers (Firefox, Chrome, Safari and Microsoft Edge) are standards compliant. Older browsers, such as Internet Explorer 8, 9, and 10, have lower levels of compliance. Content developed using HTML5 standards will not render properly unless you invest additional effort to make the content backwards-compatible with older standards. While best practices to create content for the consumer internet are widely documented, there is no authoritative source. Veeva suggests using Mozilla's Web Developer Guides as a basis.

Two content development approaches can be used in Veeva CLM and also deployed to the web using Engage for Portals or CoBrowse:

- Create one presentation that renders on all browsers. This guarantees that a single presentation is reusable but requires additional testing and design constraints.
 - Design simpler than usual content. This ensures the content renders on older web browsers.
 - Use conditional logic to determine browser capabilities and adjust content dynamically. This logic adds complexity but is possible with single presentations.
- Create two presentation variants: one for Veeva CLM that renders only on the device browser and one for Engage for Portals and CoBrowse that runs on all internet browsers.



- This approach duplicates content to some degree, but it is simpler to test and deploy
- CLM content can be more sophisticated than web content
- Updates and release cycles can be independent for CLM and Engage for Portals/CoBrowse, resulting in less risk
- If CLM content needs to be very sophisticated with complex visuals and use of the [CLM JavaScript library](#), this method is the best option

HTML Content Packaging

HTML slide content is also secured. However, since an HTML slide is a collection of many types of assets (images, CSS, JavaScript, fonts) referenced within an HTML page, we can only secure the primary slide HTML page. All linked assets within a page are technically accessible on the web without a secure token; however it would take considerable effort to reverse engineer a complete slide.

For example, a slide HTML page is named index.html.

```
./doc_id/index.html
```

The myslide1.html contains links to images and css and js files in subfolders:

- ./doc_id/images/image1.jpg
- ./doc_id/shared/styles.css
- ./doc_id/shared/animations.js

Organize the content using specific guidelines within a slide folder structure. The following folder names are reserved for organizing HTML assets in the parent slide folder. You cannot use other folder names.

- ./img/
- ./image/



- ./images/
- ./shared/
- ./html/

All files within these folders are publicly accessible. If users know the root path, which can be difficult to discover, they can retrieve assets from these folder locations. The content in its entirety will never be accessible since the primary page that represents the slide is secured behind an authentication token.

These file extensions are always publicly accessible:

- .JS
- .CSS
- .TTF
- .WOFF
- .WOFF2
- .SVG
- .EOT
- .CUR

When uploading presentations into Vault, package them based on the following guidelines and upload them as source files. See [Manually Uploaded Distribution Packages in Vault Help](#) for more information.

- any_name.zip
 - index.html - Required file name. This name is required for the main page.
 - thumb.png - Required file for the player to use as a thumbnail image
 - (img/image/images/shared/html folders)



The legacy CLM packaging structure is detailed in the Packaging Custom CLM Content topic. The .ZIP file shares a name with the HTML file inside a folder. For example, the cholecap-1-intro.ZIP file and the cholecap-1-intro.HTML file are stored in the cholecap-1-intro folder.

Loading Content in Vault

All Engage content must be stored in Vault. Each piece of content is stored as a document.

Additional properties for Engage are

- CRM Media Type: This field is required. The options are Image, PDF, Video, and HTML.
- HTML width: the width of the content; this field is blank if the content is not a fixed size
- HTML height: the height of the content; this field is blank if the content is not a fixed size
- HTML file name: the name of the HTML file when using the legacy packaging structure; if using the current packaging structure, this value is "index.HTML"
- Key Message: references a specific Key Message

Multichannel slides marked as Engage content should be placed inside an Multichannel Presentation binder. Vault creates a distribution package for images, PDFs, and videos and attaches it to the Vault document. User must upload a Zip file for HTML content. When the Send to Engage action is triggered, the distribution package is sent to the CDN and published so CRM can retrieve the metadata from Vault. See [Integration and Security Process](#) for more info.

- The Multichannel presentation maps to Multichannel content records
- The Multichannel slides inside the Multichannel presentation map to Multichannel Content Asset records



- Content Deployment records are also created to match the Multichannel Content to a site

To create an image slide in Vault:

1. Select an image.
2. Upload the image to Vault as the Multichannel Slide document type.
3. Enter the properties of the document.
4. Select Yes in the Engage Content field.

Vault converts the image to .JPG, creates a .PNG thumbnail (200x150), zips the files, and creates the Veeva Distribution Package. The user can modify the thumbnail.

To process video content in Vault:

1. Select a video.
2. Upload the video to Vault as the Multichannel Slide document type.
3. Enter the properties of the document.
4. Select Engage Content = Yes.

Vault converts the video different bitrates and creates a poster .PNG and thumbnail .PNG (200x150) of the video. All the files are zipped and placed in an Engage distribution package. The user can modify the poster and thumbnail.

To process HTML content in Vault:

1. Select a ZIP file that is packaged per Packaging Custom CLM Content.
2. Upload the ZIP file to Vault as the Multichannel Slide document type.
3. Enter the properties of the document.
4. Select Yes in the Engage Content field.



- If it is fixed size HTML content, enter the HTML width, HTML height
- If using CLM packaging structure, enter the HTML file name. Do not enter this information if using the new Engage packaging structure with index.html.

Vault finds the image in the ZIP file and uploads it as the source file. Vault also adds the ZIP file as the Distribution Package for the Multichannel Slide.

To create a presentation:

1. Create a Multichannel Presentation document.
2. Enter the document properties.
3. Select Yes in the Engage Content field.
4. Select Yes in the CoBrowse Content field if the Presentation should be available for CoBrowse.
5. Select the appropriate multichannel slides to include (where Engage Content = Yes).
6. Select the appropriate websites.

Note: Users need to create these Key Messages, websites, and product properties as records in CRM and then manually create them in Vault as Vault Object Framework (VOF) records. They can be selected via the properties on the Vault document.

See [Working with CLM Content](#) in Vault Help for additional information.

Testing Engage/CoBrowse Content

Always test content in a native browser before testing in Engage/CoBrowse. The Engage/CoBrowse media player supports IE8+. While the content must be designed to render within these browsers, if the content does not work in a browser, it will not work in the media player.



Veeva also recommends you test in an iframe before testing in Engage/CoBrowse. The iframe simulates how content will behave in the Engage/Cobrowse media player. It can be a challenge to build content that is responsive in an iframe because the vertical dimension may not behave as expected. For example, media queries, the 'vm,vh' units, a combination of both could cause unexpected behavior.

The following is a sample iframe landing page that ensures the web page hosting the CoBrowse player fills the entire page:

```
<!DOCTYPE HTML>

<html>

<head>

<title>Engage/CoBrowse iframe content sample</title>

</head>

<body>

<iframe style="position: absolute; top: 0; bottom: 0; left: 0; right: 0; background-color: white;"
frameborder="0" width="100%" height="100%" scrolling="no" src="./engage-cobrowse_con-
tent_page.html"></iframe>

</body></html>
```

Engage/CoBrowse Content Tips

- Always use cross-browser supported HTML, assuming the customer expects content to work on Internet Explorer 8. [Can I Use](#) is the authoritative source on cross-browser supported HTML.
- Use a default meta tag for the landing page and for content pages. Do not scale the content using meta. For example:



- `<meta name="viewport" content="width=device-width, user-scalable=no, initial-scale=1, maximum-scale=1, minimum-scale=1" />`
- Do not use [rem units](#) for sizing anything, for example, text or images. This can unpredictable results on desktop vs mobile and is not compatible with older versions of Internet Explorer.
- Do not use [vw units](#) for sizing. The are not compatible with Internet Explorer 8.
- Third-party javascript libraries, such as jQuery, must support Internet Explorer 8 and higher. This may mean using older versions of those libraries.
- Test HTML content in iframe before testing in Engage
- Test HTML content in native browsers before testing in Engage/CoBrowse
- Embedded videos in HTML are not supported
- PDF documents embedded within HTML popups are not supported
- The following Veeva JavaScript Library functions work with Engage/CoBrowse. For more JavaScript information specific to Engage, see the Engage section in the [JavaScript Library](#).
 - `NextSlide()`, `PrevSlide()` - navigates to adjacent slides
 - `gotoSlide()` - navigates to a slide based on the provided parameters
 - `GetDataforCurrentObject()` (limited to Account object) - displays Account attributes
 - `createMultichannelActivityLine()` - creates custom clickstream tracking
- `gotoSlide` JavaScript functionality is available for CoBrowse/Engage. See [HTML5 Content Creation](#) for more information.



CoBrowse Content Tips

- You must include the Veeva JavaScript library even if it does not explicitly use any of the Veeva Javascript functions. To verify the library is present, look for a red dot on the participant's screen that indicates the presenter's mouse.
 - Touch interactions on the HTML content between the presenter and viewer must be facilitated. Get the latest version of the Veeva JavaScript function [here](#).
- Javascript events are limited to
 - `onMouseClicked`
 - `onMouseMove`
- Input fields and check box select actions are now supported and cannot be used in CoBrowse HTML content.
 - This feature allows presenters to use interactive content, such as calculators, in their presentations.
 - For example, if a presenter enters age and weight into a dosage calculator, the viewer can see the details and results of the calculation.
 - In addition to keyboard inputs, the HTML `<select>` tag is supported as an interactive element transferred via CoBrowse
 - This feature is enabled by default.
- Avoid touch events
- Drag and drop is not supported
- Page- and document-level scrolling is supported
- Complex scrolling in sub-elements is not supported



- Test content from both sides (presenter and viewer) to ensure actions are transferred
- If users will present CoBrowse content from a touch device, HTML slides and host pages should include code snippets to improve the user experience on touch devices. The following are recommended content changes, but are not required:
 - Prevent the content from zooming when the user double-taps the iPad screen
 - ◆ Code snippet sample:
 - `<meta name="viewport" content="width=device-width, user-scalable=no, initial-scale=1, maximum-scale=1, minimum-scale=1" />`
 - Prevent the host page from bouncing on iOS and mobile Safari when navigating the content using touch gestures. The default behavior on touch devices is that a web page “bounces” when the user flicks the page up, down, left, or right. This movement can distract the presenter and make it difficult to navigate CoBrowse content. The code snippet must be added at two levels:
 - ◆ The customer page hosting the Engage for Portals/CoBrowse player
 - ◆ Each HTML slide page (for HTML slides only; not required for image or video slides)
 - Code snippet sample:

```
document.addEventListener("touchmove", function(event){
    event.preventDefault();
});
```
 - Prevent touch-hold gestures from invoking the copy/paste menu. The CoBrowse presenter may inadvertently trigger the menu when touching



interactive elements on an HTML slide. To prevent this, add the code snippet at two levels:

- ◆ The customer page hosting the Engage for Portals/CoBrowse player
- ◆ Each HTML slide page (for HTML slides only; this is not required for image or video slides)
 - Code snippet sample:
 - ```
document.addEventListener("touchmove", function (event){
 event.preventDefault();
});
```
- ◆ The snippet code can be included in a CSS file, in a <style> tag in the head of the HTML content page, or as an inline style.

## CoBrowse/Engage for Portals Permission Sets

Permission sets are available for CoBrowse and Engage for Portals making it easier to get started with these features. Two permission sets are included, one for the administrator/integration user, and one for the field user. Since Engage for Portals and CoBrowse both utilize the same infrastructure, the same Permission Set can be used for the integration user in either case.

- ENGAGE\_INTEGRATION\_USER\_VOD
- COBROWSE\_FIELD\_USER\_VOD

The following is a quick-start guide and outlines the permissions included in the delivered permission sets, and may overlap with configuration instructions outlined in other areas of the CoBrowse and Engage for Portals documentation. This section is not intended to outline all features of CoBrowse and Engage for Portals.



**Note:** Every major version of Veeva CoBrowse and Engage for Portals updates these permission sets to include permissions to the newest features. New feature deployment involves change management and training. For that reason, Veeva recommends cloning the Veeva-delivered permission sets and enabling the features that you want to use.

## Profile Setup: Object Permissions

- C = Create
- R = Read
- U = Update
- D = Delete

| Object                      | User | Int/Admin |
|-----------------------------|------|-----------|
| Account External ID Map     | Read | CRUD      |
| Accounts                    | Read | Read      |
| Content Deployments         | Read | CRUD      |
| Key Messages                | Read | CRUD      |
| MultiChannel Activities     | Read | CRUD      |
| MultiChannel Activity Lines | Read | CRUD      |
| MultiChannel Content        | Read | CRUD      |
| MultiChannel Content Asset  | Read | CRUD      |
| Sites                       | Read | CRUD      |

## Profile Setup: Field Permissions – Integration User

| Object                  | Field      | Permission |
|-------------------------|------------|------------|
| Account External ID Map | All Fields | Read/Write |
| Content Deployments     | All Fields | Read/Write |



| Object                      | Field      | Permission |
|-----------------------------|------------|------------|
| Key Messages                | All Fields | Read/Write |
| MultiChannel Activities     | All Fields | Read/Write |
| MultiChannel Activity Lines | All Fields | Read/Write |
| MultiChannel Content        | All Fields | Read/Write |
| MultiChannel Content Asset  | All Fields | Read/Write |
| Sites                       | All Fields | Read/Write |

### Profile Setup: Field Permissions – Field User

| Object                     | Field             | Permission |
|----------------------------|-------------------|------------|
| Call                       | CoBrowse Activity | Read       |
| Call                       | CoBrowse Session  | Write      |
| Call                       | Participant URL   | Write      |
| Call                       | Presentation      | Write      |
| Call                       | Zvod_CoBrowse_vod | Read       |
| Site                       | URL               | Read       |
| Multichannel Content       | All Fields        | Read       |
| Multichannel Content Asset | All Fields        | Read       |
| Content Deployment         | All Fields        | Read       |
| Multichannel Activity      | All Fields        | Read       |
| Multichannel Activity Line | All Fields        | Read       |

### Profile Setup: Granting Access to Record Types

The Integration User Permission Set includes access to the following record types:

- Multichannel Activity – Engage\_vod
- Multichannel Activity Line – Engage\_vod
- Multichannel Content – Engage\_vod



- Multichannel Content Asset – Engage\_vod
- Site – Engage\_vod
- Content Deployment – Engage\_vod
- Account External ID Map – Engage\_vod

## Profile Setup: Granting Access to Visualforce Pages

The Integration User permission set includes access to the following Visualforce pages:

- Engage\_Content\_Administration\_vod
- Engage\_MetaData\_Administration\_vod
- Scheduler\_Administration\_vod

All CoBrowse Field User permission sets include access to the CoBrowse\_vod Visualforce page.

## Org Configuration: Creating the CoBrowse Call Record Type

A CoBrowse specific Call Record Type and Page Layout must be created to allow users to record CoBrowse interactions. The CoBrowse specific record type must also be assigned to the user profile capturing the interactions. The detailed configuration steps can be found [here](#).

## Org Configuration: Account Configuration

To allow users to schedule ad-hoc CoBrowse interactions, the “Start CoBrowse” button must be added to the relevant Account page layouts. To do this, add the button to the desired Account page layouts. The steps to do this are described in more detail [here](#).

## Org Configuration: CoBrowse Record Types

The CoBrowse records types for certain key objects are delivered in an inactive state. These must be manually activated and assigned to the Integration User profile. Below are relevant



record types that must be activated:

- Multichannel Activity – CoBrowse\_vod
- Multichannel Activity Line – CoBrowse\_vod
- Account External ID Map – CoBrowse\_vod

## Org Configuration: Enabling VMobile Object Configurations

Enable the following VMOCs:

- Multichannel Activity
- Multichannel Activity Line
- Multichannel Content
- Multichannel Content Asset
- Site