Engage for Portals April 2024

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Legal Notice

Setup for CoBrowse and Engage for Portals

CoBrowse and Engage for Portals are platforms designed to provide the ability to share marketing and product material via a website interface. Users view presentations in the Engage Media Player, which is embedded in any website, with access via a link to an HCP. This allows users to view product information at their leisure and eliminates the need for a sales rep to be present.

The Engage Media Player enables users to view and interact with content and provides the ability to capture content usage on the web. The content usage is stored in Veeva CRM for future analysis.

Engage for Portals integrates with Veeva Vault for content management capabilities, content life cycle, and approvals. It also offers integration with Veeva Approved Email with intuitive administration consoles in both Veeva Vault and Veeva CRM, and advanced debugging capabilities.

Setup and Administration

Architecture

Engage for Portals consists of four major integrated components that have specific functionalities:

- Veeva CRM - This is the Engage hub responsible for Account matching, activity tracking, and content authorization
- Veeva Vault - Used as the content management system, Veeva Vault ensures the latest version of approved content is pushed to the web and available for use in Engage for Portals. Veeva Vault is also responsible for packaging content and creating web-optimized video distributions.

- Engage Media Player - The player is what gets deployed to customer hosted web-sites. The player is designed to play rich web-optimized content on any browser and platform (i.e., online or mobile device)

- Content Distribution Network (CDN) - In order to deliver quality content at the speed required in the consumer space, global network infrastructure presence is necessary. Veeva utilizes an enterprise grade CDN to ensure content is delivered well within the acceptable time frame.
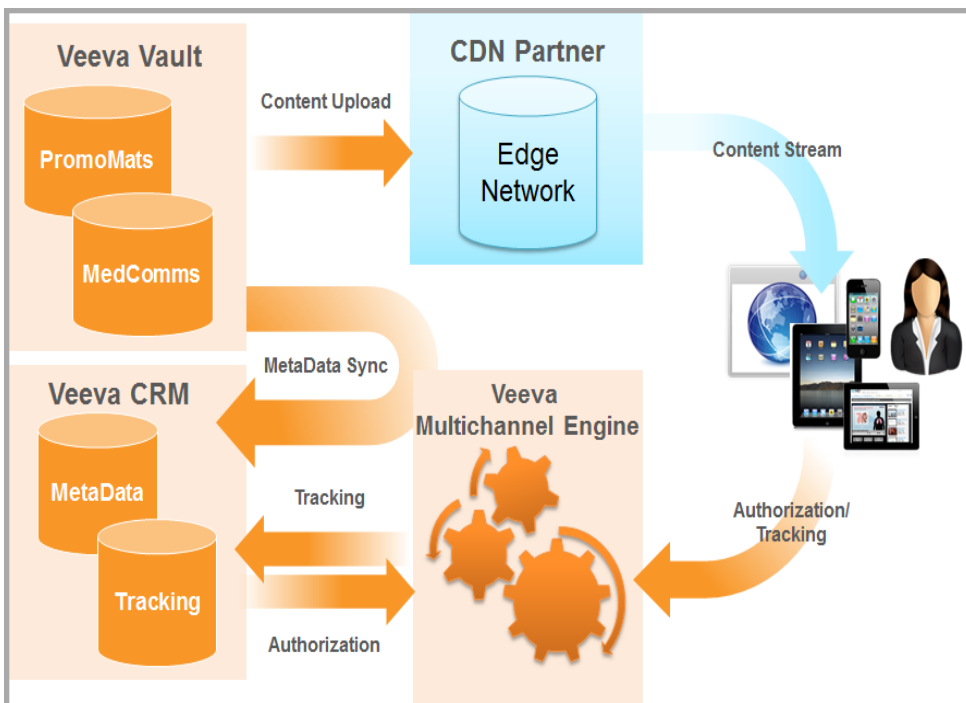
Engage for Portals User Roles

There are several types of Users who interact directly with Engage for Portals functionality.

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Content Loader - Veeva Vault (Typically the someone from the Content Agency)	• Uploads content as documents • Associates documents to a binder • Pushes content to CDN • Preview content	Veeva Vault			

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Content Administrator - Veeva Vault	• Maintaining the content lifecycle required by Engage for Portals. • Ensuring content is tagged with the appropriate metadata (websites, KeyMessages) • Ensuring content is being pushed to the CDN appropriately • Previewing deployed	Veeva Vault			

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
	content				

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Content Administrator - CRM	• Ensuring content is deployed correctly via the Content Deployment Console • Making sure websites and Key Messages are available in CRM • Activate/deactivate deployments in preparation for content go-live	CRM – housed in a VF page called Engage_Content_Administrator_vod	• Multichannel Content • Multichannel Content Assets • Multichannel Activity • Multichannel Activity Lines • Sites • Content Deployments	• Veeva External ID on Product_vod • Veeva External ID on Key_Message_vod	• Profile assigned to the VF page • Custom Web Tab to house the Engage_Content_Administrator_vod web page and set tab to Default for Content Admin profile.

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Metadata Sync Administrator	• Ensure metadata sync process is running correctly • Setup Veeva Vault Connections • Setup CRM integration User for Engage for Portals processes	CRM	• Multichannel Content • Multichannel Content Assets • Multichannel Activity • Multichannel Activity Lines • Sites • Content Deployments	• Veeva External ID on Product_vod • Veeva External ID on Key_Message_vod	

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Integration User - CRM	• Login used by the system to perform all integration tasks in CRM including creating and updating records when syncing with Vault.	CRM			
Integration User - Vault	• Must be a system administrator • Login used by the system to perform all integration tasks in Vault	Vault			

User Type	Responsibilities	Platform	Access to Objects	Access to Fields	Configuration
Rep User	• Drive traffic to Engage for Portals content using Approved Email.	CRM			

Configuration Steps by Application

Engage for Portals configuration requires specific steps in both Veeva Vault and Veeva CRM. For more information, see Working with Engage Content and About CLM & Engage Integration in Veeva Vault's documentation. This document provides an overview of the important areas of Engage for Portals in Vault.

Veeva Vault Configuration

The Veeva Vault configuration required by Engage for Portals is split into two major categories: content lifecycle setup and general content setup. See Vault documentation for more complete instructions.

Content Lifecycle setup process:

- Setup a content lifecycle (update or create new) which manages content on the CDN. You can use the CRM Content Lifecyle, which is delivered when the Engage Integration is enabled in Vault, or you can create your own.
  - At least one lifecycle state needs Send to Engage as an entry action for the content to be pushed to the CDN.

- At least one lifecycle state needs Withdraw from Engage as an entry action for content to be removed from the CDN when obsolete.

  - When creating the entry action for withdrawal, select the content directory to withdraw. The options are Production or Stage. If the content in the lifecycle was previously in a steady state lifecycle state, there is content in the Production directory. If the content was in any other non-steady state lifecycle state, the content is in the Stage directory.

- Ensure at least the Engage Content? flag is selected before automatically sending to/withdrawing from Engage for Portals.

- If the Content User needs the ability to explicitly send and withdraw content from the CDN, place the User action, Send to Engage on the lifecycle state required.

- Send to Engage only displays if the Engage Content? flag is selected.

General Content Setup process:

- Create Website Objects in Veeva Vault (required) (See Vault documentation for more information.)The URL__v field is required and must be unique. This is the exact location of the deployed Engage Media Player. The URL__v field value in Vault and the URL_vod__c field on the Site_vod object in CRM must match for the integration to work properly

- Create KeyMessage Objects in Veeva Vault (optional) (See Vault documentation for more information.)

- Create Multichannel Presentation (doc type) Binders for your content. These are represented as Multichannel_Content_vod records in CRM.

- Multichannel_Activity_Line_vod records can be created by including the createMultichannelActivityLine(values,callback) method in the material.

> **Note:** Special characters are not supported as entered text via this method. For example, the "(" and ")" characters.

- Select the Engage Content Flag for the Multichannel Presentation Binder.

- Align the Presentation to one or more of the website records created in Step 1. These are the websites which are approved to display this presentation.

- Add content (doc type Multichannel Slide) to the Multichannel Presentation Binders. These are represented as Multichannel_Content_Asset_vod records in CRM.

- If applicable, add KeyMessage references for each piece in the Multichannel Presentation Binder. Adding a KeyMessage reference allows reporting to identify which Key Messages were viewed by an HCP.

- Ensure the CRM Media Type is populated appropriately for each piece in the Engage Binder.

- If the content is HTML, ensure the proper HTML attributes are populated.
  - HTML Height/Width: Populate these if the content is a fixed size. This centers the content relative to the view port.
  - HTML File Name: Populate this field if the main HTML file in distribution package is one directory level below the root. The directory name must be the same as the HTML file name.

- Once the attributes are set, the content can be pushed to the CDN via the methods outlined in the lifecycle setup section. Once pushed to the CDN, the Engage metadata service pulls the content metadata into CRM.

Veeva CRM Configuration

Engage for Portals requires new CRM objects and certain fields on existing CRM objects. These objects contain setup and content information, and also track the Engage activity by end

users over the internet.

The tables below define the objects and permissions required to setup and integrate Engage for Portals into websites.

CRM Object	Fields	Record Type	Integration User	Content Admin (CRM)	Metadata Sync Admin	All Other CRM Users
Account_ External_ID_ Map_vod	all	Engage_vod	CRU	R	No Access	R
Content_ Deployment_ vod	all	Engage_vod	CRU	R	No Access	No Access
Multichannel_ Activity_vod	all	Engage_vod	CRU	R	No Access	R
Multichannel_ Activity_Line_ vod	all	Engage_vod	CRU	R	No Access	R
Multichannel_ Content_vod	all	Engage_ Presentation_ vod	CRU	R	No Access	R

CRM Object	Fields	Record Type	Integration User	Content Admin (CRM)	Metadata Sync Admin	All Other CRM Users
Multichannel_ Content_ Asset_vod	all	Engage_ Slide_vod	CRU	R	No Access	R
Site_vod	all	Engage_vod	R	CRU	No Access	No Access
Key_Mes-sage_vod	VExternal_ Id_vod	n/a	R	CRU	No Access	R
Product_vod	VExternal_ Id_vod	n/a	R	CRU	No Access	R
Approved_ Document_ vod	Engage_ Document_ Id_vod	n/a	CRU	R	No Access	R
Sent_Email_ vod	Id, Name	n/a	R	R	No Access	R

Note: One person in your organization can assume one or more of these roles. The profile can be configured to combine the permissions required for each role. Read-Only for Other Users to MC_Activity_vod & MC_Activity_Line_vod objects is just a suggestion, it is not required.

The Visualforce pages are required to connect with Veeva Vault PromoMats to retrieve Engage metadata, and also to review, test, and control deployments of Engage presentations content.

Visualforce Pages	Integration User	Content Admin-istrator	Metadata Sync Admin	All Other CRM Users
Engage_Content_Admin-istration_vod	✗	✓	✗	✗
Engage_MetaData_Administration_vod	✗	✓	✓	✗

Vault – CRM Integration

Note: If your customer is using both Approved Email and Engage for Portals, an integration user must be submitted and validated in both the Engage MetaData Admin Console and the Approved Email Admin Console. However, the integration users can be the same, as long as the submitted user has the required permissions for both Engage for Portals and Approved Email.

To enable the Vault-CRM Integration:

- Enter a Vault user on the Engage MetaData Admin Console in the Vault Connection Management section.
  - Validate Credentials

- Enter a CRM user on the Engage MetaData Admin Console in the Veeva Connection Management section.
  - Validate Credentials

Configuration - Advanced Player Configuration

This feature enables Engage for Portals viewers the ability to see related presentations in the Engage Media Player if there are multiple presentations related to Site_vod. This also gives users greater visibility with more content.

To enable this feature:

- Provide the Engage Admin in CRM FLS Edit to the following fields on the Site_vod object:
  - Language_vod__c (determines the language to use when displaying the title of the Related Content tab)
  - Related_Content_vod__c (determines where the Related Content container displays in relation to the Engage Media Player; to the right of the player, on the bottom of the player or disabled completely)

- Set the Related_Content_vod & Language_vod picklists (only setup item for an Admin). The Related Content Container displays under the following conditions:
  - Site_vod

- Related_Content_vod <> Disabled or Null

- Language_vod <> Null

- More than one active / Approved Presentation is associated with the Site_ vod record.

> **Note:** You can only view presentations with Stage assets when in Preview Mode.

Display Order of Engage Related Presentations

Related presentations can now be sorted by display order (ascending order) and presentation name to improve access and navigation of the Engage sidebar content.

The Display_Order_vod field determines the order the presentations display when there is more than one presentation. Presentations then display alphabetically by presentation name.

For example:

If Veeva.com has six related presentations:

- Cholecap Safety (order 4)
- Cholecap Efficacy (order 2)
- Cholecap Patient Info (order 2)
- Cholecap Overview (order 2)
- Cholecap Sample Video (order 3)
- Cholecap MOA Video (order 1)

This displays in the Engage sidebar content as follows:

- a) Cholecap MOA Video (because it is order 1)
- b) Cholecap Overview(order 2)
- c) Cholecap Efficacy (order 2)

- d) Cholecap Patient Info (order 2)

- e) Cholecap Sample Video (order 3)

- f) Cholecap Safety (order 4)

To configure and edit the display order:

CRM:

- Add the Display_Order_vod field to the Multichannel_Content_vod__c object.

- Add the field to the page layout.

- Grant Write permission to the integration user.

Vault:

- Ensure the crm_related_content_display_order__v field is Active in Vault and visible to users on the Multichannel Presentation document type.

- Populate the field on the appropriate Presentations.

Creating Engage Content

The Engage Player is supported on Chrome, Safari, and Firefox on desktops and Safari mobile on iPad, Chrome and stock browser on Android on mobile devices.

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

  - PDFs in Engage for Portals presentations display as rendered images in the player and are not interactive

  - 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), and Safari (laptop only).

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.

Securing Engage/CoBrowse Content

To protect your content from unauthorized access, a secure token is generated and used for CoBrowse and Engage sessions. This secures all slides that are images, videos, or PDFs. No Engage/CoBrowse content is indexed by search engines.

Creating HTML Content

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 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.

To optimize storage space and reduce sync times, HTML assets can be shared across multiple Key Messages in CLM and Engage for Portals. See Using Shared Resources for more information.

> **Note:** Embedded videos in HTML are not supported.

Cross-Browser Web Development

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 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

Responsive HTML Content

Engage for Portals supports responsive content. However, vertical responsiveness within an iFrame can be a technical challenge. There are different methods to achieve this.

Responsive content is not required for CoBrowse. Content is scaled to the presenter's viewport so the participant views the same content. WebEx and GoToMeeting scale content in a similar manner.

For example, the New York Times website is a responsive website, meaning it resizes to fit the player.

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 entirely 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, ini-
    tial-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.

This feature is available for Engage for Portals and on the iPad and Windows Tablet platforms.

Tracking Details

Engage for Portals tracks detailed user engagement activity as Multichannel_Activity_Line_vod records. Each slide record line can have a duration (stored in Multichannel_Activity_Line_vod.Duration_vod) but duration values are approximate in some cases, and may be NULL in some cases.

Duration Tracking Behavior:

- For the first slide activity, duration value is tracked if the user views the slide for more than 2 seconds If the first slide is viewed for less than 2 seconds, the Duration value is NULL. This implies the user opened the first slide, but navigated away from the page within 2 seconds.

- Duration values are updated every 30 seconds when the user is viewing a slide. The duration value will be updated in 30 second increments.

- When the user navigates to the next slide, the duration value on the prior slide will be updated with the total actual time spent as of the transition to the next slide.

- Time spent on a single slide is capped at 300 seconds (5 minutes). It is assumed the user is interrupted, for example left their desk or is doing something else, and we limit the duration tracking.

- When the user closes the browser window, Engage for Portals may not capture the exact duration of the final slide. This is a browser limitation. Some browsers allow Engage for Portals to track the close event, and some do not. When a browser does not allow this we capture the duration on a 30 second timer, and the trailing time up to 29 seconds may not be captured.

Scenarios Where the Duration is NULL

- The user spent less than 2 seconds on the last slide they viewed

- If only one slide was viewed, and the duration was less than 2 seconds, the duration on the activity line will be NULL, and the total duration on the Multichannel_ Activity_vod record will also be NULL.

- In exceptional circumstances, tracking events might be lost that will cause the duration times on the last slide to be NULL.

Examples of Engage for Portals Tracking

User views one slide for less than 2 seconds:

- User lands on Engage presentation for less than 2 seconds and closes the browser

- Result: Multichannel Activity and Multichannel Activity Line durations will both be NULL

User views one slide for more than 2 seconds and does not transition to next slide:

- User lands on Engage presentation for 130 seconds and then closes browser window

- Multichannel Activity Line record duration will be updated at these intervals:
  - 2 seconds
  - 32 seconds
  - 62 seconds
  - 92 seconds
  - 122 seconds
  - Result: The duration for Slide One will be 122 seconds. The final 8 seconds will not be tracked since we update at 30 second intervals.
  - Result: Multichannel Activity duration will be 122 seconds

User views Slide One for 58 seconds and Slide Two for 38 seconds, then closes the browser:

- User lands on Engage presentation Slide One
- Multichannel Activity Line Slide One record duration will be updated at these intervals:
  - 2 seconds
  - 32 seconds
  - At 58 seconds user navigates to Slide Two.
  - Result: The duration for Slide One will be 58 seconds since we capture the duration upon slide transition
- Multichannel Activity Line Slide Two record duration will be updated at these intervals:
  - 2 seconds
  - 32 seconds

- Result: The duration for Slide Two will be 32 seconds since the browser was closed. The final 6 seconds will not be tracked since we update at 30 second intervals (this assumes the browser close action cannot be tracked).

- Result: Multichannel Activity duration will be 90 seconds (58 seconds Slide One + 32 seconds Slide Two)

User views Slide One for 58 seconds, navigates to Slide Two and does not close the browser:

- User lands on Engage presentation Slide One

- Multichannel Activity Line Slide One record duration will be updated at these intervals:

  - 2 seconds

  - 32 seconds

  - At 58 seconds user navigates to Slide Two.

  - Result: The duration for Slide One will be 58 seconds since we capture the duration upon slide transition

- Multichannel Activity Line Slide Two record duration will be updated at these intervals:

  - 2 seconds

  - 32 seconds

  - 62 seconds, and will continue to a maximum duration of 300 seconds

  - Result: The duration for Slide Two will be 300 seconds since we limit the duration for any one slide to 300 seconds

  - Result: Multichannel Activity duration will be 358 seconds (58 seconds Slide One + 300 seconds Slide Two)

User views Slide One for 10 seconds, navigates to Slide Two for less than 2 seconds, next to Slide 3 for less than 2 seconds, next to Slide 4 and does not close the browser:

- User lands on Engage presentation Slide One

- Multichannel Activity Line Slide One record duration will be updated at these intervals:
  - 2 seconds

  - At 10 seconds user navigates to Slide Two.

  - Result: The duration for Slide One will be 10 seconds since we capture the duration upon slide transition

- Multichannel Activity Line Slide Two record duration will be 1 second, since the user quickly navigates to Slide Three

- Multichannel Activity Line Slide Three record duration will be 1 second, since the user quickly navigates to Slide Four

- Multichannel Activity Line Slide Four record duration will be updated at these intervals:
  - 2 seconds

  - 32 seconds

  - 62 seconds, and will continue to a maximum duration of 300 seconds

  - Result: The duration for Slide Four will be 300 seconds since we limit the duration for any one slide to 300 seconds

Integration with Veeva CRM

The following Veeva JavaScript Library functions currently work with Engage for Portals:

- getDataForCurrentObject - available if an Account is specified (using the '&actid' parameter) which exists in the Veeva CRM DB. Allows access using following keywords: Account, Address, and TSF
- nextSlide
- prevSlide

Tracking

Native Tracking

Tracking of slide views is automatically done by the player. Each time the player is loaded, a Multichannel Activity record is created. Each slide view has a child Multichannel Activity Line record created.

Key information tracked:

- Multichannel Content
- Multichannel Content Asset
- Key Message
- Product/Detail Group
- Duration
- Display Order

Custom Tracking using the JavaScript Library

The createMultichannelActivityLine function works with Engage for Portals. It automatically fills in the various properties from Multichannel Content Asset, Multichannel Activity lookup, and the date/time.

Account Tracking

Account activity is tracked using the following parameters included in the URL used to visit the portal:

- The &actId parameter – If `&actId = <Account SFDC record ID>`is appended to an Engage for Portals URL, the Multichannel Activity and Multichannel Activity Line associated with the specific account.

- The &extId parameter – If `&extId = <Third Party External ID>` is appended to the URL, the Multichannel Activity and Multichannel Activity Lines associate with the corresponding Third Party External ID.

Whenever a user generates a new Engage for Portals session, a new Multichannel_Activity_ vod record generates and associates with the corresponding Account_External_ID_Map_vod record. To associated with the appropriate Account_External_ID_Map_vod record, the following process is performed automatically:

- If an existing Account_External_ID_Map_vod record already exists with a matching VExternal_ID_vod field, the existing record is associated with the Multichannel_Activity_vod record

- If no records exist with a matching VExternal_ID_vod field, a new record is created and associated with the Multichannel_Acvtivity_vod record.

The VExternal_ID_vod field may contain one of several values, based on the parameter included in the URL:

- If the &actId parameter was included, the VExternal_ID_vod field displays in the format `Account SFDC ID::Domain`. For example:

  123456::VerteoBioPharma.com

- If the &extId parameter was included, the VExternal_ID_vod field displays in the format `Third Party ID::Domain`. For example:

  VerteoBP001::VerteoBioPharma.com

- If neither parameter is included, the VExternal_ID_vod field contains a User Cookie that can be used to reconcile Account_External_ID_Map_vod records. For example:

  When an account visits an HCP portal for the first time, and the URL used has an &extId parameter, a new Account_External_ID_Map_vod record is created with all fields except for Account_vod automatically populated.

  Later, the same account visits the same portal using a different link with an &actId parameter. A new Account_External_ID_Map_vod is created with all fields, including Account_vod, automatically populated.

  These two records have the same User_Cookie_vod value, so the admin can reconcile the two records to ensure data quality.

CoBrowse/Engage for Portals Permission Sets

Permission sets are available for the CoBrowse and Engage for Portals products 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.

> **Note:** Ensure the VeevaUserPermissions Apex Class is installed before continuing with permission sets. See Implementing Security in Veeva CRM for more information.

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

Object	User	Int/Admin
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
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_Presentation_vod
- Multichannel Content Asset – Engage_Slide_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. See the Creating and Modifying Call Records procedure for more information.

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. See the Creating and Modifying Call Records procedure for more information.

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 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