

## Veeva CRM Engage Meeting FAQs

### QUESTION

### ANSWER (as of March 2021)

#### Software, Hardware and Bandwidth Requirements

<i>Is CRM required?</i>	Yes, CRM Mobile is required for use from an iPad and CRM Online is required for use from a Windows PC.
<i>Is Veeva CRM Approved Email required to send Engage Meeting invites?</i>	<ul style="list-style-type: none"> <li>• No, Veeva CRM Approved Email is not required but will provide a much better experience for HCPs and allow you to track email sends, opens, and clicks.</li> <li>• Plus, Approved Email includes a calendar reminder option to keep Engage Meetings top of mind with HCPs.</li> </ul>
<i>Is Veeva CLM required?</i>	Veeva CLM is required when hosting from the iPad, but not for hosting from CRM Online from a Windows PC
<i>Which mobile platforms will Engage Meeting support for HCPs?</i>	<ul style="list-style-type: none"> <li>• All iOS iPads/iPhones that support iOS9+</li> <li>• All Android 4.4+ (KitKat+)</li> </ul>
<i>Which desktop/laptop device types will Engage Meeting support for HCPs?</i>	Windows 8+ laptop and desktops and all Macs are supported by the Web Client when joining from a compatible browser. A microphone and camera are required for VoIP and video.
<i>What additional hardware is required to join Engage Meeting?</i>	There is no additional hardware required if using the Veeva HCP Engage apps. If the HCP is joining using a modern browser (Chrome, Edge Chromium, Firefox, and Safari), there are no additional hardware requirements. If the HCP is joining via Safari they will need a phone to connect to audio.
<i>What devices will work for a pharma employee hosting the call?</i>	iPads for hosting from CRM Mobile or Windows PCs for hosting from CRM Online.
<i>Is an app required on the HCP/participant side?</i>	An app is required when joining from a mobile device such as an iPhone, iPad or Android device. When joining from a Windows PC or Mac, the HCP will be directed right to the Web Client and will not need to download an application (unless they do not have a compatible browser).
<i>Which audio features are supported?</i>	<ul style="list-style-type: none"> <li>• HCPs can join using VoIP directly from the Veeva Engage HCP app. If joining via a web browser such as; Chrome, Edge Chromium, Firefox, Safari. A microphone is required.</li> <li>• Veeva CRM Engage Meeting includes local toll numbers in most countries. Country-level information can be found <a href="#">here</a>. In the instances where included toll numbers are not available, Veeva customers can choose to add premium audio options for an additional charge. Information can be found <a href="#">here</a> in the "Toll (Fee-based)" columns.</li> <li>• Veeva CRM Engage Meeting includes toll numbers in most markets. Premium audio options (toll-free and call-out options) are available for an additional cost per market. Details of global audio services and market coverage are available on <a href="#">Zoom's website</a>.</li> </ul>

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*Is a 'landline' phone required to dial into an Engage Meeting?* If a participant is joining an Engage Meeting via the Veeva Engage HCP apps or the Veeva Engage Meeting Web Client (using a modern browser) they will not need a separate phone line to dial in to the meeting audio.  
Please see the Capabilities section for details about which apps support VoIP.

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*Can an Engage Meeting be held over a cellular network?* Yes, one or all of the participants can join over a cellular network.

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*Will a phone number be available in the event one or more of the participants wants to join the 'voice' portion of the meeting over the phone?* Yes.

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*What are the bandwidth requirements for Engage Meeting?* Engage Meeting works on 3G/LTE connections and in low-bandwidth environments. The quality of the audio and video are optimized on demand in response to available bandwidth.  
Recommended bandwidth for:

- One-to-one video calling: 600kbps (up/down) for HQ video and 1.2 Mbps (up/down) for HD video
- Group video calling: 600kbps/1.2Mbps (up/down) for HQ video
- Gallery view: 1.5Mbps/1.5Mbps (up/down)
- Screen sharing only (no video thumbnail): 50-75kbps
- Screen sharing with video thumbnail: 50-150kbps
- Audio VoIP: 60-80kbps

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*Are there markets where Engage Meeting will not be supported?* There are some markets where Zoom cannot operate due to regulatory reasons. You can access the full list [here](#).

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## Capabilities

*Can HCPs join Engage Meeting audio via VoIP?* Yes, if the participant joins an Engage Meeting via one of the following apps they will be able to use VoIP to join the meeting audio:

- Veeva Engage HCP apps (on iOS, Android, and Windows)
- Veeva Engage Meeting Web Client via a modern browser (Chrome, Edge, Firefox, Safari)

This is assuming the device has an integrated microphone. Mobile devices will have an integrated microphone. Modern laptops commonly include an integrated microphone as well.

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*What type of content can be shared during an Engage Meeting?* Engage Meeting uses Veeva CLM content when using CRM Mobile, so the guidelines are the same. For the latest information please go to the "Content Creation" Section in the CRM Engage Meeting Online Documentation at this [link](#).  
Engage Meeting online allows the user to show their desktop (if configured), as well as approved CLM content. This is content sourced from Vault. The Engage Meeting Online media player is a different platform than the iPad, so content built for the iPad must be tested and will likely require modification. See more information on content [here](#).

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*Can the meeting participants have text chat?* Yes, text chat can be optionally enabled for HCPs joining via the Veeva Engage Meeting HCP apps. The Engage Meeting Web Client does not support chat. The chat transcripts are not recorded. Chat is only available during the meeting.

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<i>Can Engage Meetings be recorded?</i>	Not at this time.
<i>Can the video be turned off?</i>	Each user can control if their video is on or off. As well, the host can request that a participant turn on their video (the host can not turn it on) and can turn off a participant's video (again, the host can not turn a participant's video on, only off).
<i>Is the camera on by default? Can the HCP or rep disable the camera?</i>	By default, meetings start with the camera off for both the host and participants.
<i>Can the volume be muted?</i>	The host and each participant has control over their audio options. Additionally, the host has the option to mute all participants (but each participant would still have the option to turn it back on).
<i>Can the video window be minimized once a CLM presentation has started?</i>	Yes, on iOS and Android the video tiles live in a ribbon which can be minimized to provide more screen real estate for the shared content.
<i>Do Veeva CRM Engage Meeting invites include the ability add the meeting link to a native calendar (Google, Outlook, etc)?</i>	The ability to add to calendar or send an .ics file (calendar reminder) is available now.
<i>Can a doctor start a meeting on-demand?</i>	Not at this time.
<i>Can a booking agent schedule a meeting on behalf of another pharma employee?</i>	If the central scheduler is a CRM user, yes.
<i>Can the participants see the call page or anything else on the rep's/MSL's machine during an Engage Meeting call?</i>	If the CRM users is hosting from the iPad, the participants will see the splash screen until a CLM presentation is shown in full-screen. If the user returns to the call page, the splash screen will be shown. Overlay screens that display over the CLM presentation (such as surveys and Medical inquiries) will be displayed.
<i>Can the 'splash screen' be configured?</i>	Yes.
<i>Can the HCP app be configured?</i>	No.
<i>Can an HCP initiate an Engage Meeting call?</i>	No, currently an Engage Meeting needs to be initiated by the host (rep/MSL user).
<i>Can Engage Meeting be used in a call center environment?</i>	Yes, any CRM Mobile user equipped with an iPad device can use Engage Meeting. Users can also host from CRM Online.
<i>Can Engage Meetings be scheduled and hosted from CRM online?</i>	Yes, online only users can schedule and host meetings from CRM online. Users will need to install a new Veeva CRM Engage app on their Windows desktop in order to host the meeting.
<i>Is there an "out-of-the-box" template for invites?</i>	Yes, please reach out to your Account Executive.
<i>What will the out-of-the-box reports be?</i>	There are eight out-of-the-box reports available today to look at metrics such as logins, utilization, as well as duration.

<i>What usage stats are collected?</i>	<p>Veeva tracks:</p> <ul style="list-style-type: none"> <li>• If the invited HCP joins the meeting.</li> <li>• How long the HCP joined the meeting.</li> <li>• The slides viewed by the HCP.</li> <li>• The device and network type of the participant</li> </ul>
<i>Engage Meeting: Can the rep transfer 'sharing' to another internal user, e.g. MSL?</i>	This is not currently available.
<i>Engage Meeting: Can the rep transfer 'sharing' to the HCP?</i>	Yes, if configured.
<i>What happens when a Veeva CRM Engage Meeting ID is entered into the native Zoom app?</i>	If this is enabled – HCP can join via the native zoom app. They will appear to the Rep with a small zoom banner on their participant video.
<i>Can Engage Meeting users use their Zoom accounts outside of Veeva CRM (e.g., for internal, company meetings)?</i>	No. We have architected the solution to be 100% OEM. The customer will never see the Zoom admin console. The only way to create Zoom meetings will be through Veeva CRM entry points. End users will not know their Zoom ID or password.
<i>Can the customer restrict which CLM presentations are available through Engage Meeting?</i>	No, any approved CLM presentation which the user has access to will be able to be shown through Engage Meeting.
<i>What local languages are supported within the rep controls in CRM and also the HCP experience?</i>	<p>Once an HCP clicks on the meeting link sent by the Rep, all of the HCP touch points are localized in the 28 Veeva Supported languages.</p> <p>The entire list of supported languages can be found <a href="#">here</a>.</p>

## Number of Users / Participants

<i>How many people can join an Engage Meeting?</i>	Fifty, excluding the CRM user.
<i>How many pharma employees can join an Engage Meeting?</i>	Only one CRM license holder can join a remote meeting.

## Support

<i>What support will be available if a doctor has trouble downloading the app?</i>	Resources for HCPs including quick start guides and directions can be found <a href="#">here</a> .
<i>Will customers be able to know/audit how many CRM users are Engage Meeting users?</i>	Yes. This will be easily accessible within the Engage Meeting admin console.

## Process

<i>What is the installation process for HCPs?</i>	<ul style="list-style-type: none"><li>• For mobile devices, the process is identical to any consumer app install. Upon clicking the link in an invitation email, the HCP will be directed to the home page in the Google Play or iOS App stores and prompted to install the app.</li><li>• For the Windows app, the user will be prompted to download and install the Windows app. It will be a self-installing exe.</li></ul>
<i>What happens when a Veeva CRM Engage Meeting/Webinar link is clicked?</i>	<p>The process is similar to any other remote meeting solution.</p> <ul style="list-style-type: none"><li>• When the app is NOT present and the participant is joining from a mobile device: HCP will be prompted to download (Windows) or install from app store (iOS/Android)</li><li>• When the app IS present: HCP will be prompted to open the Veeva CRM Engage app to launch the meeting.</li><li>• HCP will be connected to the meeting via the Engage Meeting Web Client.</li></ul>
<i>How do we track HCPs' participation in Engage Meetings?</i>	<p>Veeva generates a unique meeting ID for each meeting attendee.</p>
<i>How does the multiple invite process work?</i>	<p>For an Engage Meeting with multiple attendees, each attendee will have their own unique link to join the meeting.</p> <p>If the rep does not have Approved Email, then the rep can send each attendee's their unique link to join the meeting.</p> <p>If the rep has Approved Email, then by tapping on the Send Invitations button, the unique link for each attendee can be sent all at once.</p>
<i>If customer doesn't have Approved Email, how will the invite process work?</i>	<p>There is a way to copy the link and then paste it into a native email client or iMessage (or whatever messaging app is being used on the tablet).</p>
<i>What is the process for HCPs to download the app?</i>	<p>For mobile devices, it is the same as a regular consumer app install. On a laptop, the HCP clicks a link and will be prompted to download the Windows app.</p>
<i>Is HCP authentication required before joining the Engage Meeting?</i>	<p>HCPs will receive a unique personalized link to join the meeting. They will click the link to join. We will assume it's the HCP.</p>
<i>What if I don't want to use CLM content – how would that work?</i>	<p>Currently only approved content available via CLM can be displayed during an Engage Meeting which is being hosted from the iPad. When hosting from CRM Online, any content that can be rendered on the Windows machine being used can be selected to be shared. However, only content from the CLM Player will be tracked/captured in CRM.</p>
<i>How is an Engage Meeting call recorded/ documented by the rep/MSL?</i>	<p>The same way a face-to-face call is documented. Engage Meeting is fully integrated into CRM Mobile so the call reporting process/functionality is the same.</p>