



IQVIA OCE Content MVP

Component Authoring - Rep Email Template

Quick Start Guide

For internal and external use

Document Version: 1.0



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Welcome to IQVIA OCE Content

IQVIA OCE Content is an IQVIA-hosted cloud-based component content management system application, designed for creating promotional and non-promotional content in modular format (including components, fragments and templates), increasing multichannel content creation, collaboration and velocity cross-functionally and globally with customers.

This Quick Start Guide is to support users with the Component Authoring - Rep Email Template Rep Emails features.

Publication Record

Application Version	Document Version	Publication Date	Author	Approver
MVP	Initial Release	March 7, 2023	J Gearhart	E Aalto

Introduction

In this document the user will learn how to create a new Rep Email (Job) view or edit existing Rep Emails and change status or delete Rep Emails in OCE Content - Component Authoring.

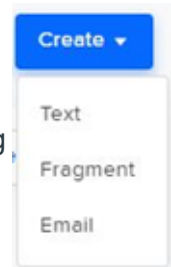
You can create unlimited number of Rep Emails based on existing Email Template, designed for OCE-Personal specific emails. You can assemble the email by using existing components and fragments or you can upload and create new in-situ Text Components to use in the body copy area of the email.

Rep Emails can also contain Rep Email Attachments, that can be sent along with the email in OCE-Personal.

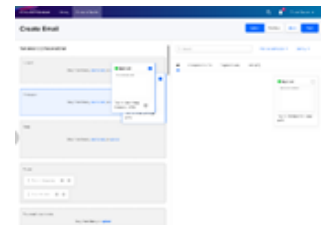
Rep Emails

Create Rep Email Job (from an Email Template)

1. Click the **Create** button in the Library, and then select **Email** from the dropdown menu to open the Create Email page
2. Choose the OCE Personal Rep Email Template from suggested options by clicking on the template
3. On the Create Email page, your Email Template is on the left-hand side. This is where you can add content to the email. On the right-hand side, you will see the Search bar and quick filters and sort options to view available components to use in your email.
4. To assemble a Rep Email, Authors can drag and drop components and fragments into the drop zones of email template. Or click to select section to edit such as the Subject line, Pre-header or Body Copy to type in the text.




- a. **Subject line:** Subject line visible to end users as free text field. Note, you can add multiple subject line options by clicking on the Add Subject+ sign and remove these with the -sign.
- b. **Body copy:** Main body of the email, including salutation, core message/call to action and sign off. You can drag both components and fragments into this area, as well as creating new in-situ text components.
- c. **Footer:** Footer is a core part of emails, usually including rights management information as well as a company logo and website links. This area is predefined with site wide footer option. This section cannot be modified by end users, only system administrators have access.
- d. **Rep Email Attachments:** A selection of available Attachments, such as PDF, Word, JPG, GIF or PNG can be added to the email. You can drag existing text or image components from the library of you can upload these. The attachments will show for end user to select from when sending an email from OCE-Personal.



5. For body copy area, new in-situ text components can be created by clicking on the 'Create Text' button in the area itself. The text can be formatted as needed using the Text tool Bar options that open when you click on the 'Create Text' button.

11. Verify the field values and:

- If the values are correct, click Save.
- If you need to modify any values, click edit icon [], and follow the procedure again.

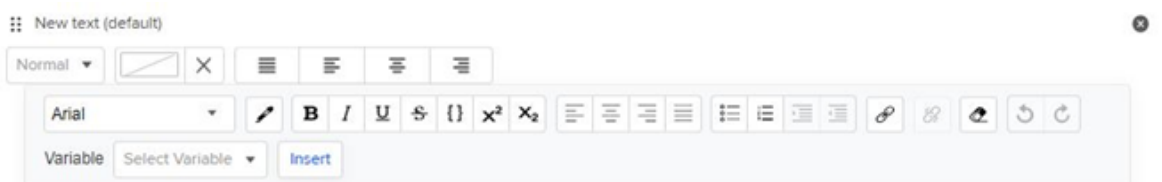
12. Once Email has been saved, you will land in Library view – The Rep Email Template (Job) is created and is shown as ‘Draft’ with a unique ID in the Library tab.



Rep Email Text (in-situ) Formatting

1. Locate the Rep Email from the Library that you wish to edit.
2. Click to open Rep Email Details Page and choose the Edit button from the three ellipses icon on the top right-hand side of the page. You can now make changes to the metadata fields as well as the Email sections such as Subject Line or Body Copy.
3. Click on the section you wish to format such as Body Copy.
4. Click on Create Text to add a new text component.
5. From the Text Editor tool bar that now appears, select an option to change font family, font size, font color, or make the text bold, italic, underline, strike out, subscript or superscript.
6. Select an option to change the text heading size, background color or alignment, or make the text numbered or bullet list, or to decrease or increase indent, or to show or hide formatting symbol. You can also use the ‘link’ option to add hyperlinks to your text copy
7. Variables can be added to text if needed by clicking the Insert button in the top right of the text area and then select the preferred variable type from the dropdown menu.
8. To insert a variable the following steps:
9. On the Variable menu, select the variable and enter or choose a value for it.
10. Click Ok.

Note: In addition, you can use the normal copy and paste function to add text into the body copy from another source

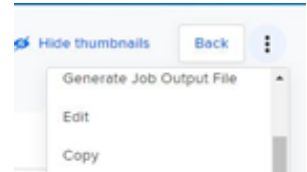


View a Rep Email

1. Locate the Rep Email from the Library that you want to view. Click to open Rep Email Details Page. On this page you will see the rendered Email on the left as well as the corresponding metadata fields on the right-hand side.
2. To return to Library, simply click the Back button.

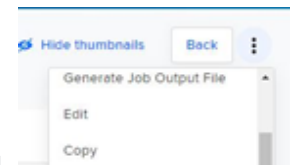
Edit a Rep Email

1. Locate the Rep Email from the Library that you wish to edit.
2. Click to open Rep Email Details Page and choose the Edit option from the three ellipses icon on the top right-hand side of the page. You can make edits to the available metadata fields as well as changes to the Email sections such as Subject Line or Body Copy.
3. After making edits, click the Next button and then Save to save your changes to the Email.



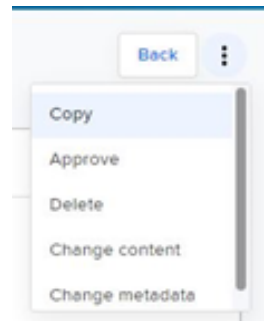
Copy a Rep Email

1. Locate the Rep Email from the Library that you wish to copy.
2. Click to open Rep Email Details Page and choose the Copy option from the three ellipses icon on the top right-hand side of the page.
3. After clicking on Copy, the system will open up a Copy modal and copy all the previous metadata details along with creating a new ID. The title field will include the word 'Copy' that's added at the start – and the user can change the title by typing/deleting the text.
4. Click 'Create Copy' button to proceed (or 'Cancel' to cancel the copy creation).
5. Once Email copy has been generated, you will land in Library view – a copy of the Rep Email Template (Job) is created and is shown as 'Draft' with a unique ID in the Library tab.



Change Status of a Rep Email

1. Locate the Rep Email from the Library that you wish to edit.
2. Click to open Rep Email Details Page and choose the 'Approved' option from the three ellipses icon on the top right-hand side of the page. This allows you to manually change the Email from Draft to Approved.
3. After clicking on Approved, the system will open an Approve Email modal with a message confirming 'You are about to approve the component – you will not be able to undo this action'
4. Once an Email is approved, it can be still changed to Expired or Withdrawn status.
5. Click the Approve button to make the status change
6. Finally, you will land in Library view –the Rep Email Template (Job) status is shown as 'Approved' in the Library tab.

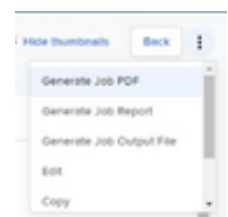


Delete a Rep Email

1. Locate the Rep Email from the Library that you wish to Delete.
2. Click to open Email Details Page and choose the Delete option from the three ellipses icon on the top right-hand side of the page. Please note, only Draft status items can be deleted
3. Upon clicking Delete button, a pop-up message will appear asking you to confirm you wish to delete the Email.
4. Click 'Delete' to confirm the action or Cancel to cancel the action. Note, once you click the Delete button, you will not be able to undo this action.

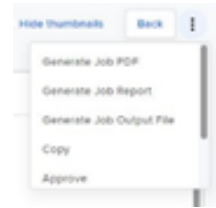
Generate PDF Output from a Rep Email

1. Locate the Rep Email from the Library.
2. Click to open Email Details Page and choose the Generate Job PDF option from the from the three ellipses icon on the top right-hand side of the page.
3. Upon clicking Generate Job PDF option, the PDF will be created and made available as a download (you will see a pop-up window with updates once the file has downloaded).



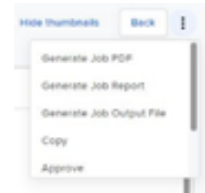
Generate Job Report from a Rep Email

1. Locate the Rep Email from the Library.
2. Click to open Email Details Page and choose the Generate Job Report option from the from the three ellipses icon on the top right-hand side of the page.
3. Upon clicking Generate Job PDF option, the PDF will be created and made available as a download (you will see a pop-up window with updates once the file has downloaded).



Generate Job Output File (zip) from a Rep Email

1. Locate the Rep Email from the Library.
2. Click to open Email Details Page and choose the Generate Job Output File option from the from the three ellipses icon on the top right-hand side of the page.
3. Upon clicking Generate Job Output File option, the zip file (created according to OCE Personal Packaging requirements) will be created and made available as a download (you will see a pop-up window with updates once the file has downloaded).



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