Veeva Commercial Vault 19R3 Deep Dive

Veeva

Agenda

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5 Admin Features

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Announcements

Veeva Commercial & Medical

SUMMIT

Europe

3-5 December 2019 | Palau de Congressos de Catalunya

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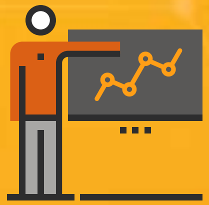

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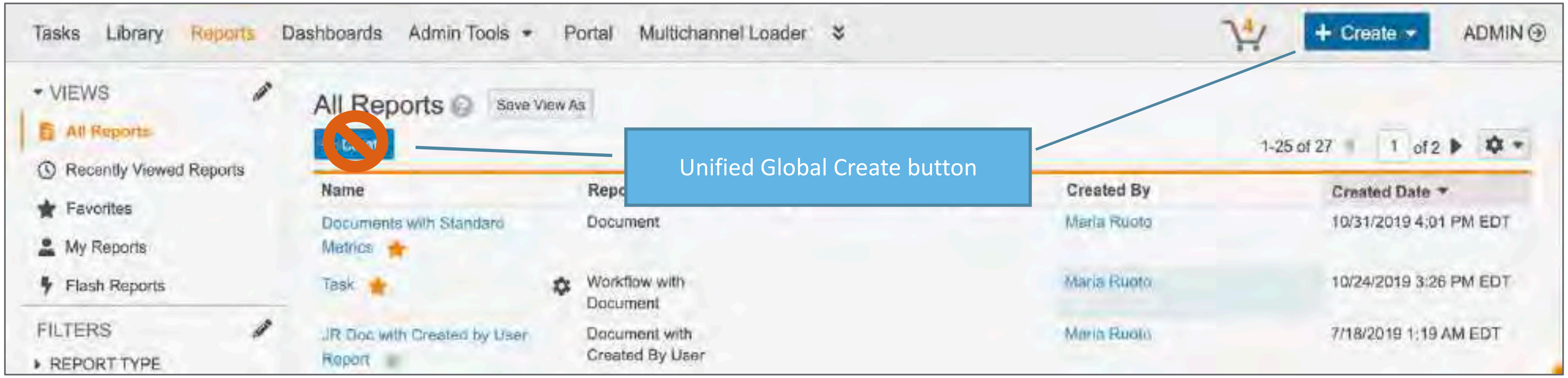
Coming in 2020: Create Button Unification

- In early 2020, we will unify Vault Create buttons and use the Global Create button across document, object, report, and custom tabs
  - The 'Global Create' button will be contextual – i.e. dynamic based on the context of the action
  - Introduces 'Most Recent' create action options
  - Merges document create actions – i.e. Create from Template, Create Binder, and Upload Document etc. under one option
  - Removes the inline Create button from Object Tabs and Reports

- The Unified Global Create button will be designated as 'Auto-on'
  - No action required for 19R3
  - Planned for 20R1



Veeva & U Library | Quick How-to Videos | Useful Links

INTRODUCING MEDCOMMS MEDICAL INQUIRY MANAGEMENT

WEDNESDAY, 13 NOVEMBER 2019
3 P.M. PARIS – 2 P.M. LONDON

Discover the benefits of unifying global medical affairs content management and medical inquiry management for more efficient scientific communications.

VAULT PROMOMATS 'BEST OF 2019'

THURSDAY, 12 DECEMBER 2019
3 P.M. PARIS – 2 P.M. LONDON

Learn and rediscover the key features which helped drive innovation and compliance in 2019.

Future sessions to look out for in 2020

- Automated Claims Linking
- Veeva Web2PDF
- PromoMats Standard Metrics

Access Veeva & U from your web browser. Type 'Veeva & U'

Veevaweb2PDF

VeevaWeb2PDF can be launched directly from Vault

Turn your website into a PDF and capture the magic of interactions

19R2.4 Release went live on
October 16th, 2019

Consistent
Same repeatable process every time

Accurate
See the true web view of your site

Complete
Capture the entire site experience using hints

Quick
About 4 hours to "hintify" average product site

Unique
The only tool of its kind

Smart
Securely passes login credentials if necessary

19R3 Release Calendar

19R3 Release Calendar

November

December

Mon	Tue	Wed	Thu	Fri
4 Pre-release vaults available	**5** 19R3 Commercial Vault release kit available	**6**	**7**	**8**
11 EU Business DD NA Business DD	**12** EU IT DD NA IT DD	**13** MedComms DD	**14**	**15**
18	**19**	**20**	**21**	22 Release to all limited release PODs and PODs VV1-12, VV1-1065
25	**26**	**27**	**28**	29
2	**3**	**4**	**5**	**6** Release to all general release PODs

When Does my Vault Get Updated?

Admin>Settings>General Settings
where you will see which POD your Vault is on.

You can see the dates related to the release, as well as the full list of PODS all available in Vault Online Help

Release Kit

- The 19R3 Commercial Vault Release Kit is now available
  - Tips to apply 19R3 features to your business processes
  - A comprehensive FAQ
  - Key feature demos for:
    - Vault Auto-Claims Linking
    - Standard Metrics
    - Veeva Medical CRM Data Sharing
    - Adding Roles to Optional Tasks

Auto-On Features

Always refer to the latest Release Notes and Online Documentation for the most up to date version of documentation and configuration steps

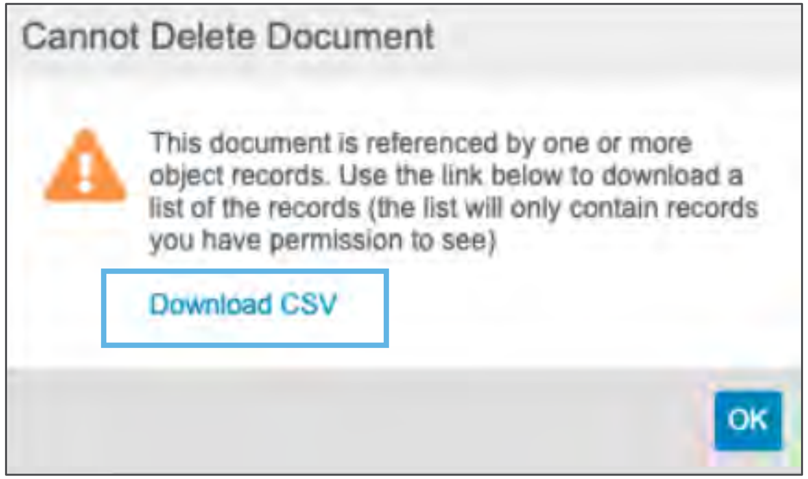
Auto-On	Admin Checkbox	Configuration	Veeva Support	Enhancement to Existing Feature	Live Demo	Video

Self-Serve Pre-Release Vaults

- Overview
  - In past releases, Veeva has cloned customer Production Vault configurations to create a Pre-Release Vault with each release
  - Starting in 20R1, customers will be able to create, refresh, and manage their Pre-Release Vaults within the Pre-Release window for each release
- Impact
  - This change gives customers greater control over their Pre-Release environments
- Use Case
  - This enhancement will be particularly helpful when a refresh is needed, or a Pre-Release needs to be created from a Sandbox (when Production is not yet provisioned)
- Considerations
  - The ability to leverage this new functionality will be available during the 20R1 pre-release period
  - Each customer is entitled to 1 Pre-Release Vault for every Production Vault
    - If no Production exists, the entitlement will be 1 for each Sandbox Vault whose Vault ID is the same as the parent Vault ID

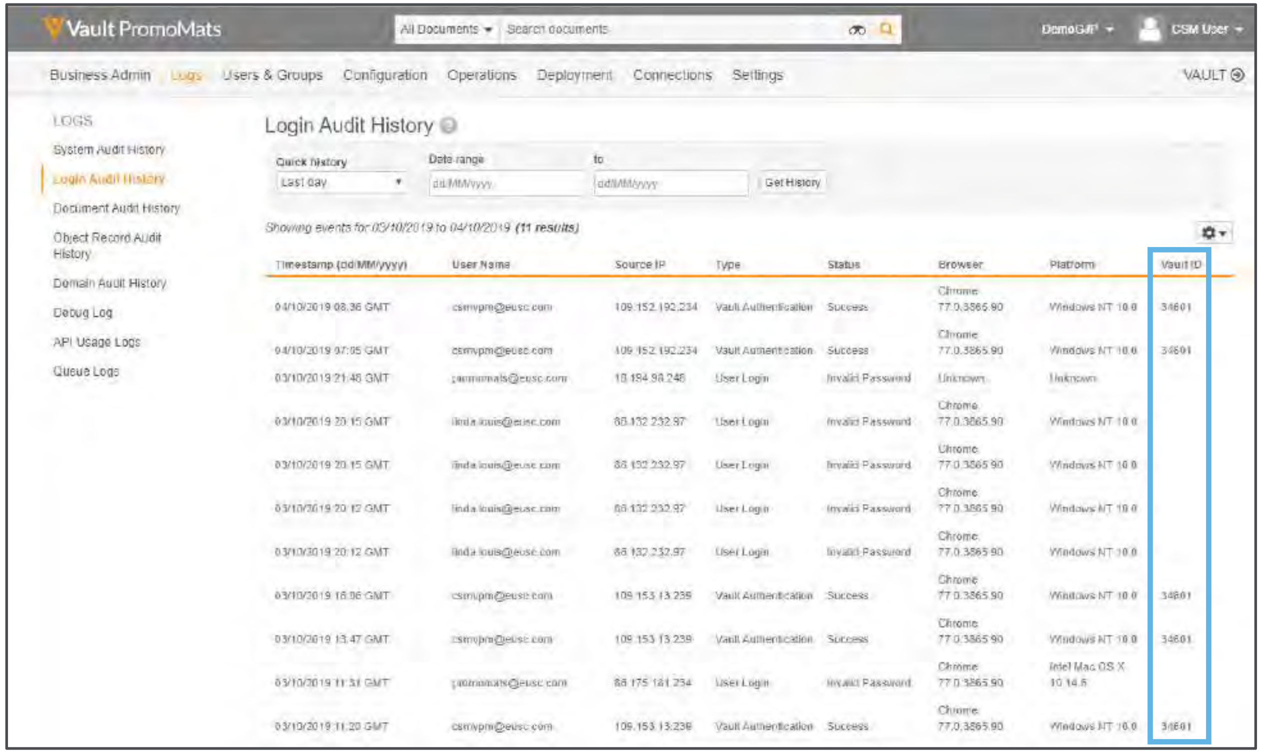
Download List of Records Blocking Document Deletion

- Overview
  - Users can now click on a link to download a CSV file containing a list of records blocking document deletion
- Impact
  - When a user cannot delete a document that is referenced by an object record, they can now identify the object records blocking the deletion



Add Vault ID to Login Audit History User Interface

- Overview
  - This feature exposes the Vault ID field in the Audit History
    - Previously you had to export the Login Audit History to access this information
- Impact
  - Admins can now quickly understand which Vault an Audit entry relates to
- Considerations
  - Login Audit History shows Vault-level authentication events each time a user accesses the current Vault
  - Admins can access the Login Audit History by going to Admin > Logs > Login Audit History to see Login Activity, including the new Vault ID field

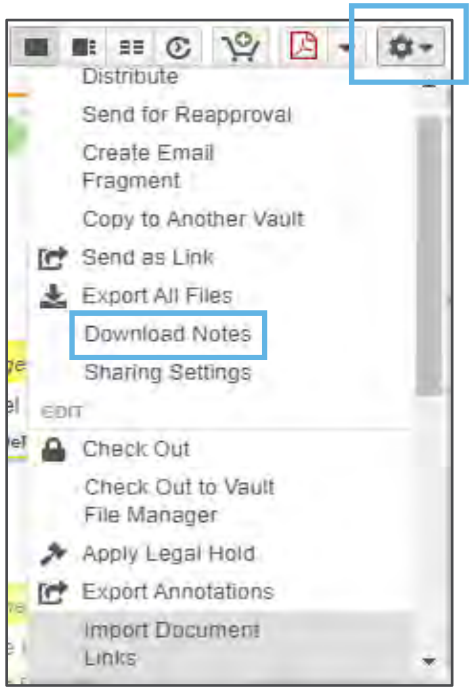


Download Notes to CSV

- Overview
  - Users can download <u>all</u> annotation types, including links and anchors, on a Vault document as a CSV file from the action gear

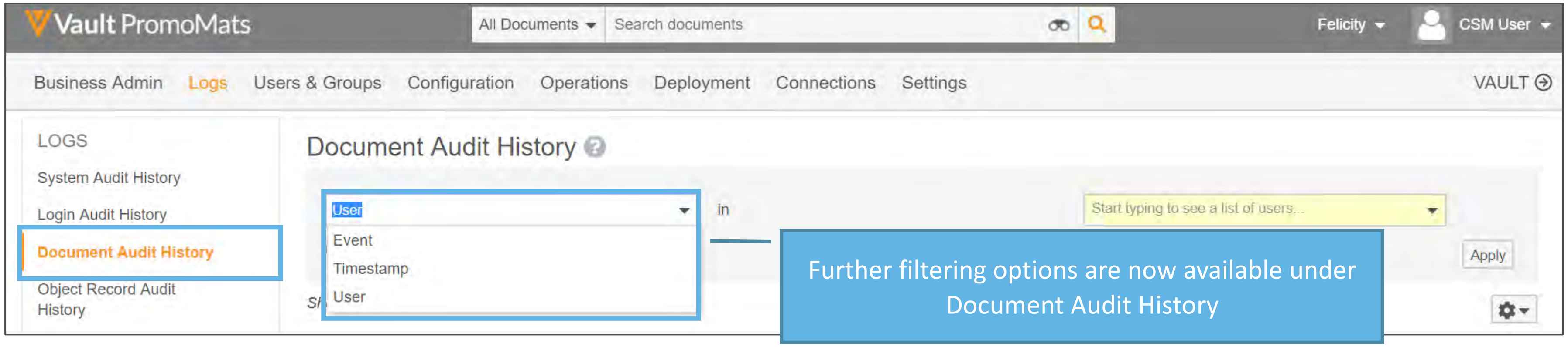
Document Name	Document Number	Document Version	Note ID	Title	Author	Created	Page	Type	Subtype	Style	Comment	Status	Tags	Anchor Name
Patient Information Leaflet - US Version	US-CH-1900074	0.1	1.57247E+12	you the genes	Maria Ruoto	20:08.2	1	Note	Text	Highlight	you all	Live		
Patient Information Leaflet - US Version	US-CH-1900074	0.1	1.57247E+12	Logo	Maria Ruoto	20:07.3	1	Note	Image	Marquee	Update logo	Live		
Patient Information Leaflet - US Version	US-CH-1900074	0.1	1.57247E+12	Package	Maria Ruoto	20:08.5	1	Note	Image	Marquee	new package	Live	Mandatory	
Patient Information Leaflet - US Version	US-CH-1900074	0.1	1.57247E+12	familial hypercholesterolaemia	Maria Ruoto	20:09.2	1	Link	Text			Live		
Patient Information Leaflet - US Version	US-CH-1900074	0.1	1.57247E+12	and	Maria Ruoto	20:09.4	1	Anchor	Text			Live		bad anchor

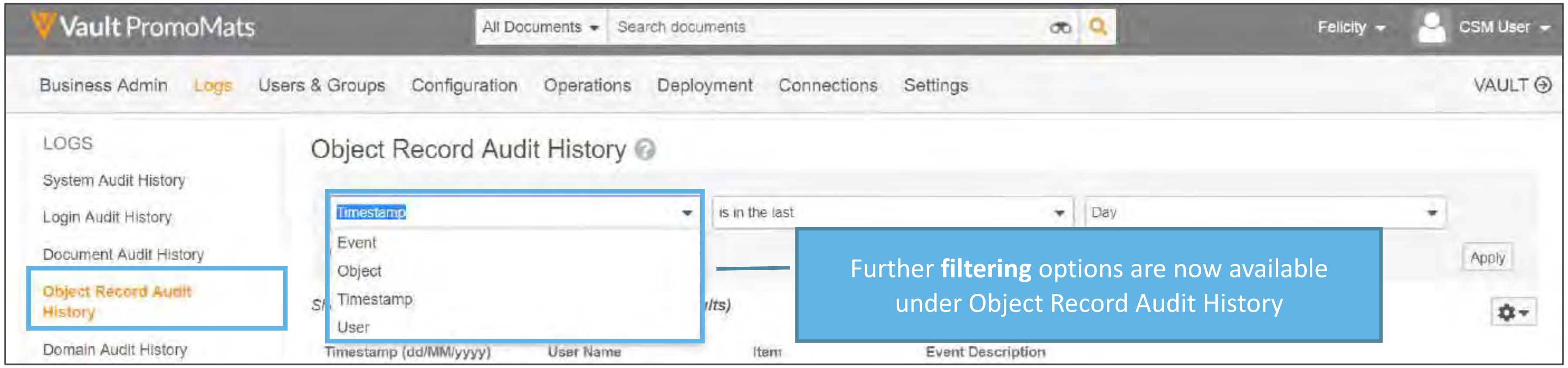
- Impact
  - Users now have a viable option to filter annotations and search comments
- Use Case
  - Users can now download annotations to a CSV that can then be filtered and sorted
- Considerations
  - Only users with View Content permissions can use this feature
  - The selected document must have a viewable rendition
  - The document must also have at least one annotation



Object & Document Audit History Filters Enhancements

- Overview
  - With this new feature more filtering options are available in the object and document audit histories
    - Filter the Document Audit History by Timestamp, Event and User in any order
    - Filter the Object Record Audit History by Timestamp, Event, User and Object in any order





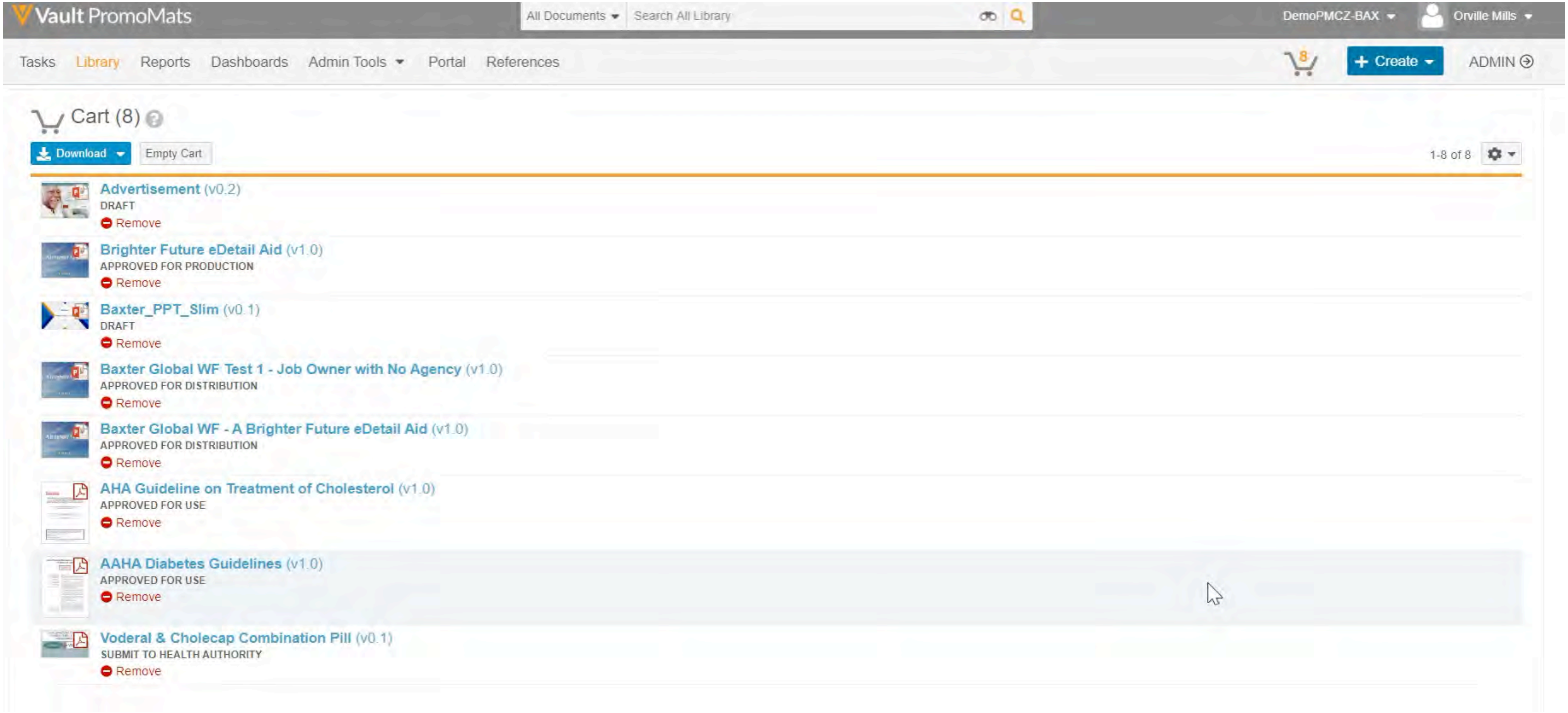
Object & Document Audit History Filters Enhancements

- Impact
  - Enables customers to more easily track specific historical activity
- Use Case
  - Customers often need to locate specific records in the audit trail, but were forced to export it in order to find what they are looking for. By enhancing this feature to allow more filtering options, specific activity is far more accessible
- Considerations
  - Filters are only available in the admin audit history
  - Only 3 filters may be applied at a time for the object audit history
  - Learn more about Viewing Admin Logs

Improved File Transfer for Vault File Manager

- Overview
  - Vault File Manager enhancements:
    - Download and upload up to 8 files at the same time
    - Progress bar and % complete for each file being checked in/out
    - Ability to skip or cancel downloads/uploads
    - Addition of new columns – New vs opened file status and file size
- Impact
  - Improves the overall Vault File Manager functionality
- Considerations
  - File transfer functionality for files >100mb and up to 4GB
  - Resumable download/ upload on Roadmap
  - Only for Windows OS

Improved File Transfer for Vault File Manager



Re-Label Doc Info Page Edit Button

- Overview
  - The “Edit” button on the Doc Info page is now labeled "Edit Fields"
- Impact
  - Allows users to differentiate between Doc Info edit and the new ‘Collaborative Authoring with Microsoft Office’ edit feature
- Considerations
  - May need to update screenshots within training materials to reflect new button label

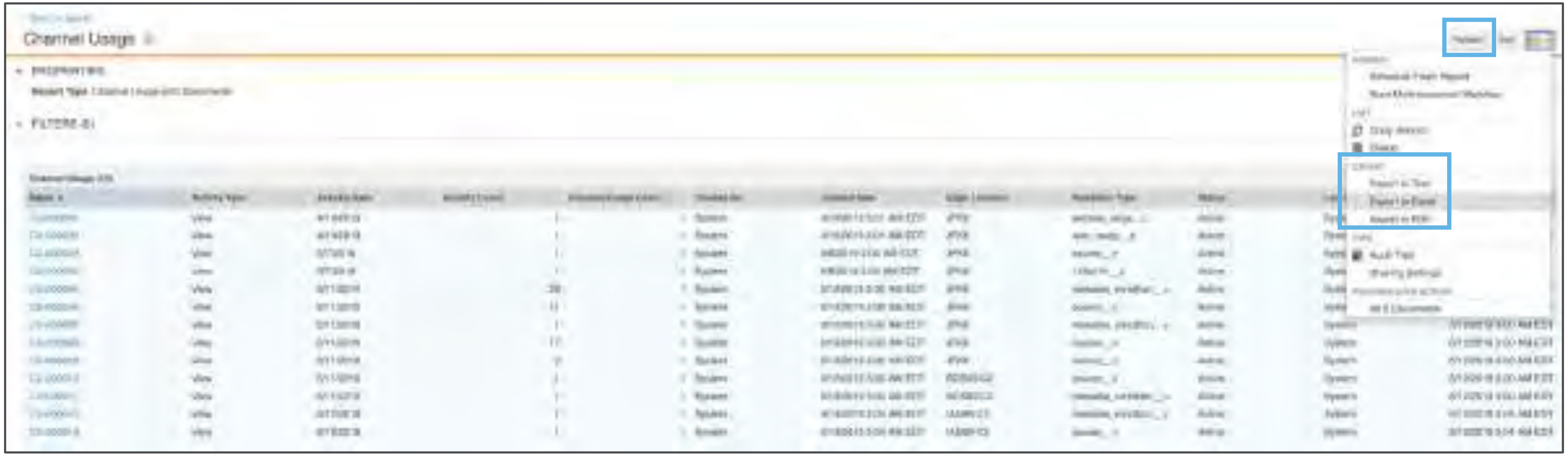
BEFORE

AFTER

Re-Labeled Doc Info ‘Edit Fields’ button

Prevent Report Re-Execution On Export

- Overview
  - Tabular reports will no longer re-execute upon export if the report was recently run (within 8 hours) by the same user
- Impact
  - Exports will render faster since reports will not have to re-execute
  - Reduces server load
- Considerations
  - Upon opening a report, click refresh to ensure that you are seeing the most recent data

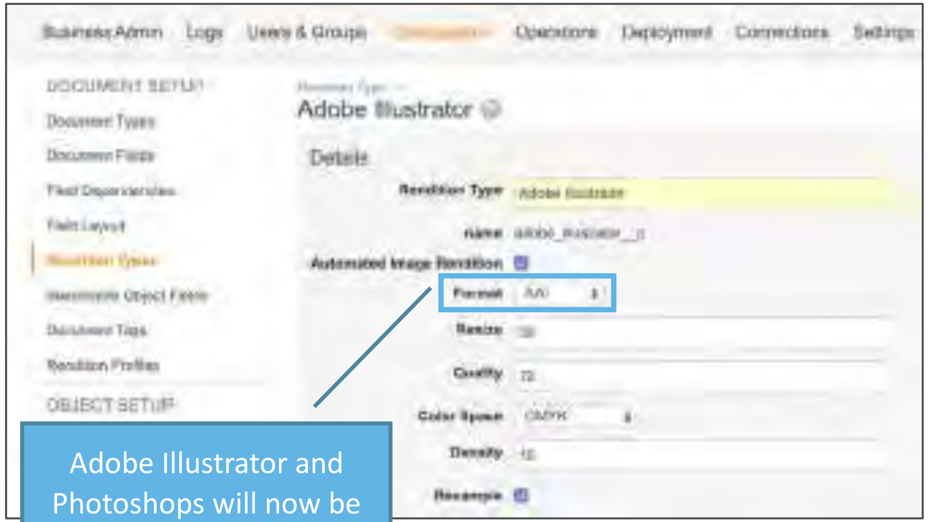


Automated Image Rendition Support for Adobe Illustrator and Photoshop

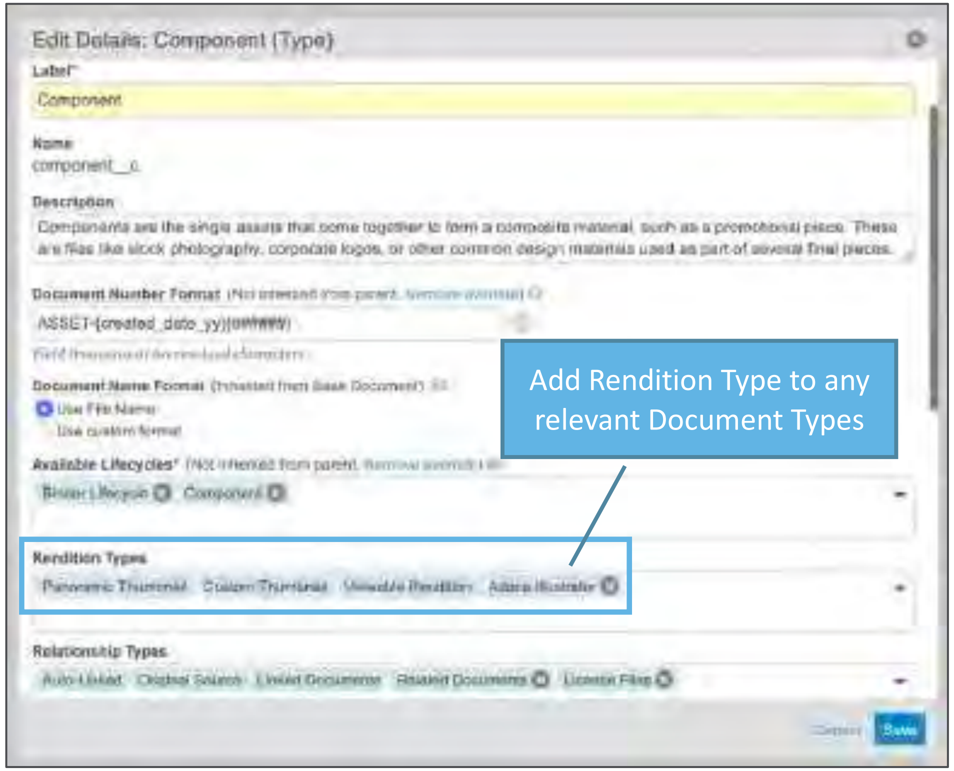
- Overview
  - This enhancement allows you to generate custom image renditions using Adobe® Photoshop® (PSD) and Illustrator® (AAI) file formats
    - In previous releases, Vault could not render PSD or AI source files to create an Automated Image Rendition
- Impact
  - Adobe Photoshop (PSD) and Illustrator files are now viable source file formats, making it easier and faster for you to have content that is channel specific inside of Vault without having manually uploaded
- Considerations
  - Automated Image Renditions must be configured and assigned to relevant Document Types
- Learn more about Automated Image Renditions

Automated Image Rendition Support for Adobe Illustrator and Photoshop

- Configuration
  - Configuration > Renditions Types > [Rendition Type]
  - Configuration > Document Types > [Document Type]



Adobe Illustrator and Photoshops will now be available in the Format dropdown when creating Rendition Types



Add Rendition Type to any relevant Document Types

- Learn more about [Automated Image Renditions]

Enhanced Business Admin Navigation

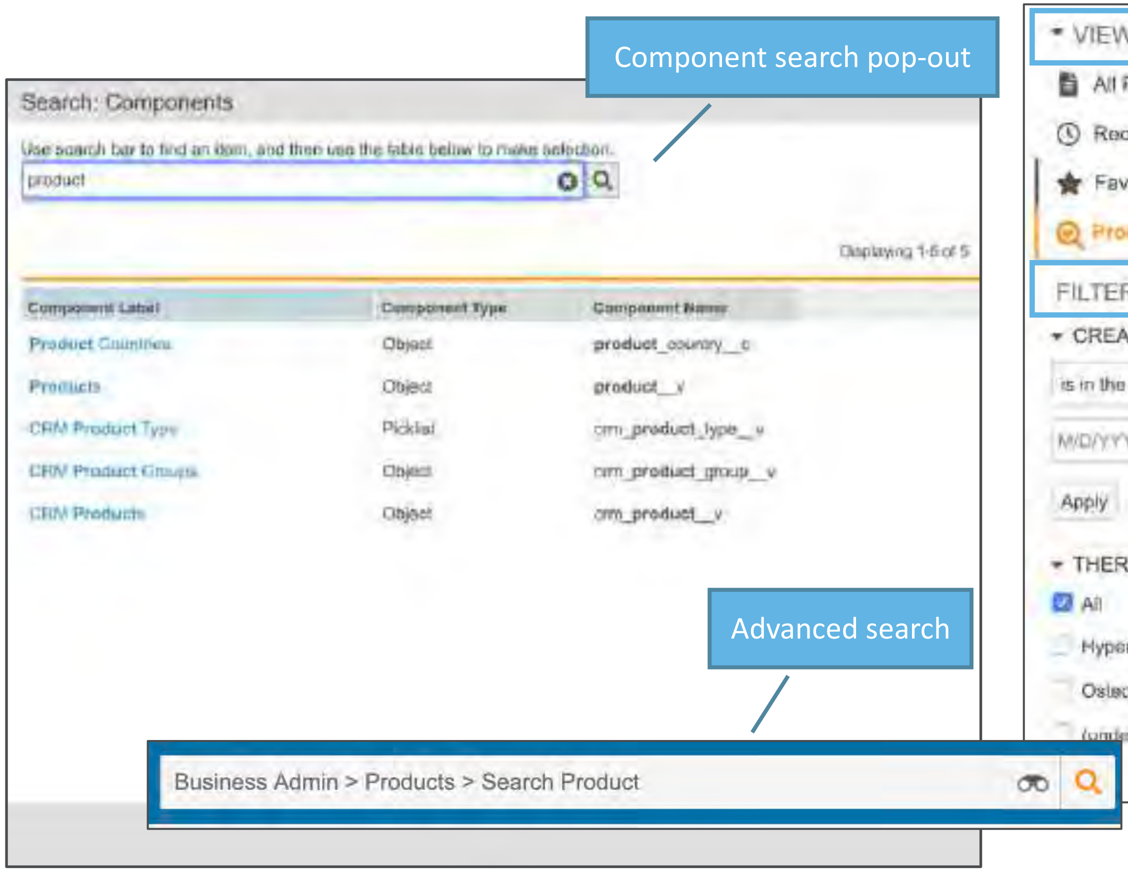
- Overview
  - When working with Object records in *Business Admin,* Admins can now use additional search options, apply filters, and save views
- Impact
  - This will make it easier to locate Object records, Picklists, and Template management pages configured to appear in the Business Admin menu
- Use Case
  - Admins can more easily find and view Objects and their records by using the search dropdown

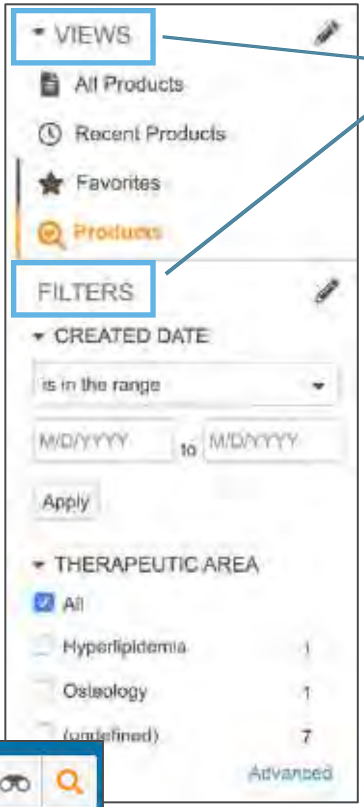
Before

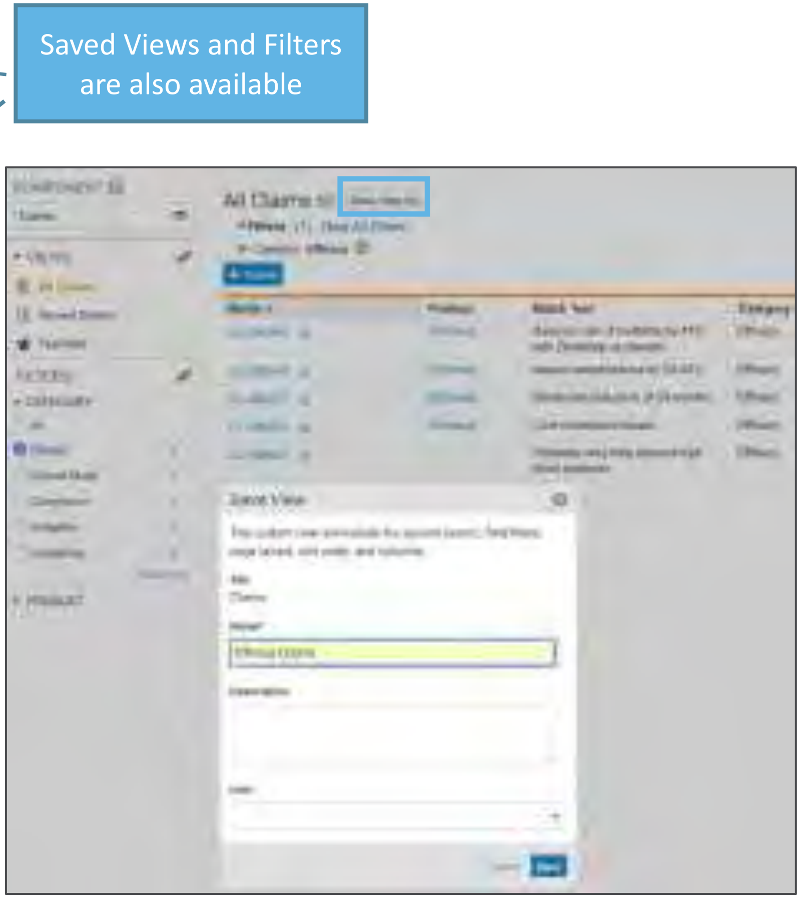
After

Enhanced Business Admin Navigation

- Considerations
  - The *Admin > Configuration > Business Admin Menu* page to configure the order has been removed
  - Business Admin will open to the last item you searched for
  - Saved Views are Object specific



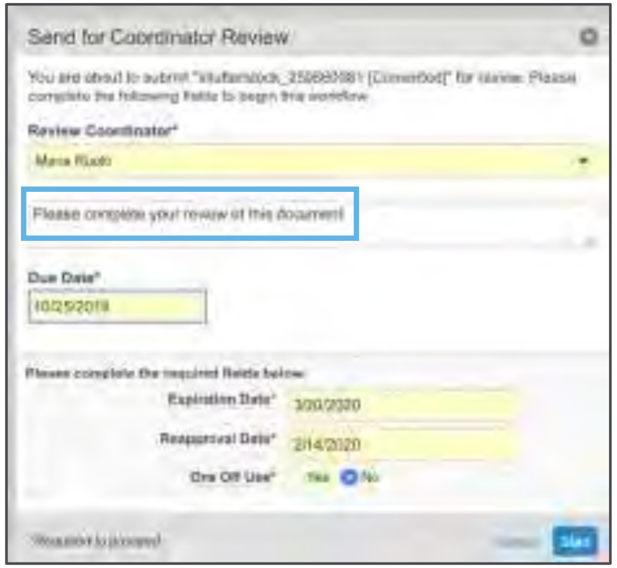


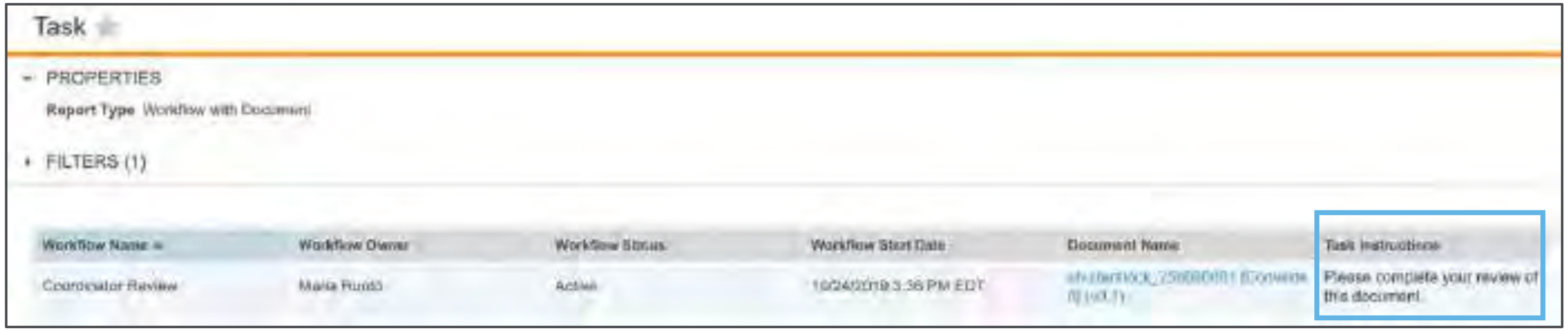


Enhanced Business Admin Navigation

Task Instructions in Reports

- Overview
  - Custom Task Instructions, provided by workflow owners when initiating a workflow, can now be included in *'Workflow with Document'* reports
- Impact
  - Users will be able to view previous custom task instructions, providing context to later steps, actions, and decisions
- Considerations
  - Instructions can be viewed only after a document workflow has been initiated





Display Object Reference Fields as Links in Reports

- Overview
  - All object reference fields in a report will display as clickable links
- Impact
  - Users will be able to view and click on object reference fields in reports
  - Both single value and multi-value reference fields will appear as links

Campaign (1)	Product (1)		Document (4)	
Name ▲	Product Name	FDA Approval	Document Name	Country
Cholecap Spring 2017 Campaign	Cholecap	Yes	Cholecap A Brighter Future_v0.2 (v 1.1)	United States
			Cholecap A Brighter Future_v0.2 (v 2.0)	United States
			Cholecap A Brighter Future_v0.2 (v 0.1)	United States
			Shutterstock Doctor Images(6) - United States - CC-04-20190001 (v0.1)	United States

Pareto Charts

- Overview
  - Pareto charts are now a supported Vault Dashboard chart type
    - Pareto charts are similar to column charts, but always displays groups in descending order and includes a cumulative percentage line

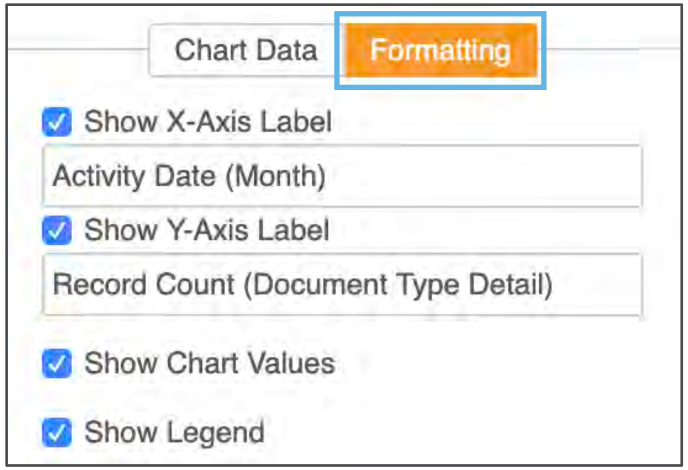
The y-axis will either be the count of the primary, down or up objects, or an aggregate field calculation (e.g., 580 (June) + 193 (July) = 773, 773/877 (Total) = 88%)

The x-axis will be determined by the grouping

- Impact
  - Provides an additional Dashboard chart option
- Use Case
  - These charts are commonly used in quality control processes

Pareto Charts

- Considerations
  - Pareto charts will be available as an option when bar or column charts are available for selection
  - Unlike a standard column chart, a ‘Group By’ option will not be visible for the pareto chart
  - Formatting Options
    - Axis Labels can be edited and hide/show
    - You can choose to hide or show chart values and the legend
    - The Cumulative % line is not editable
- Configuration
  - Dashboards > Add Component > Chart Type

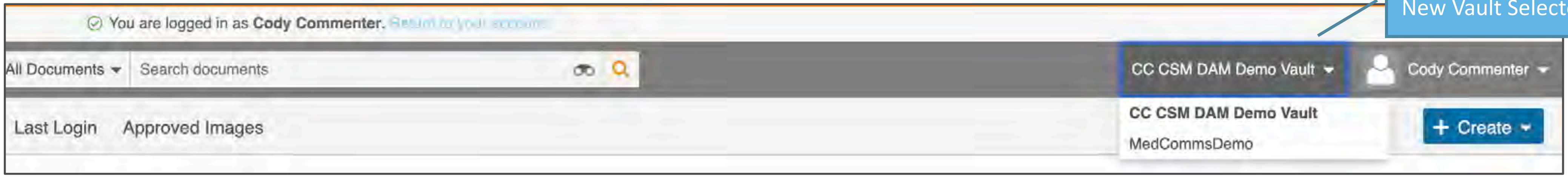


Enhanced Delegate Access Experience

- Overview
  - Prior to this release when a user had access to multiple delegated Vaults, they were not able to toggle between the Vaults
  - Now, they are able to toggle between Vaults using the Vault Selector

Before 19R3

New Vault Selector



- Impact
  - Improves the delegate user experience
- Considerations
  - If only granted access to one Vault, no dropdown list will be available

Configurable Features

Automated Claims Linking

- What is it?
  - Automates reference linking on claim statements in promotional materials
  - Claims and references are pre-approved in Vault, and applied to documents by Suggest Links action
- What are the benefits?
  - Significantly reduces time, effort, errors and cycles required to create approved references
  - Greatly improves speed and quality, resulting in more successful MLR submissions
- How does it work?
  - Suggested Links are data records in Vault with approved Match Text, references and meta-data
  - Suggest Links action creates Suggested Link annotations on matching text in document
  - Suggested links take seconds to create, and minutes to review and approve
  - Once accepted, Suggested Links become Link Annotations

Automated Claims Linking

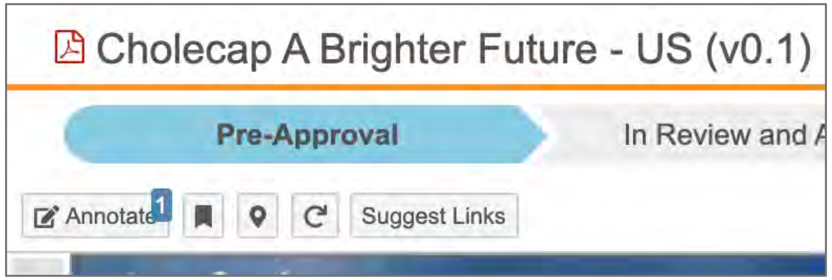
- Overview
  - Automates reference linking on claims made in promotional material
  - Pre-approved claims and references are applied to documents by Suggest Links action
    - Suggest Links action creates Suggested Link annotations based on matching text in document
      - Suggested Links are data records in Vault with approved Match Text, references and meta-data
      - Content creators Accept or Reject the Suggested Link
        - Once accepted, Suggested Links become Link Annotations
- Impact
  - Significantly reduces time, effort, and cycles required to create approved references, improving the overall quality of documents sent to MLR

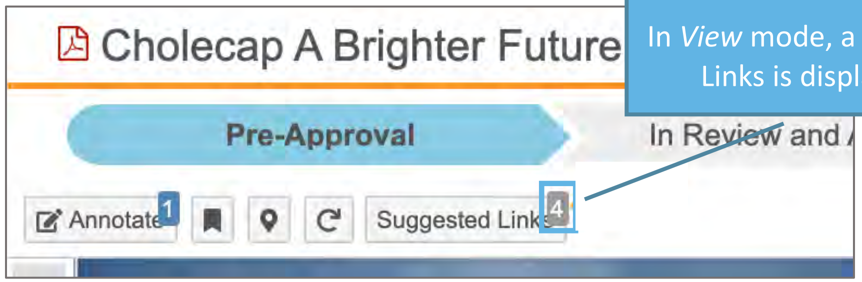
Automated Claims Linking

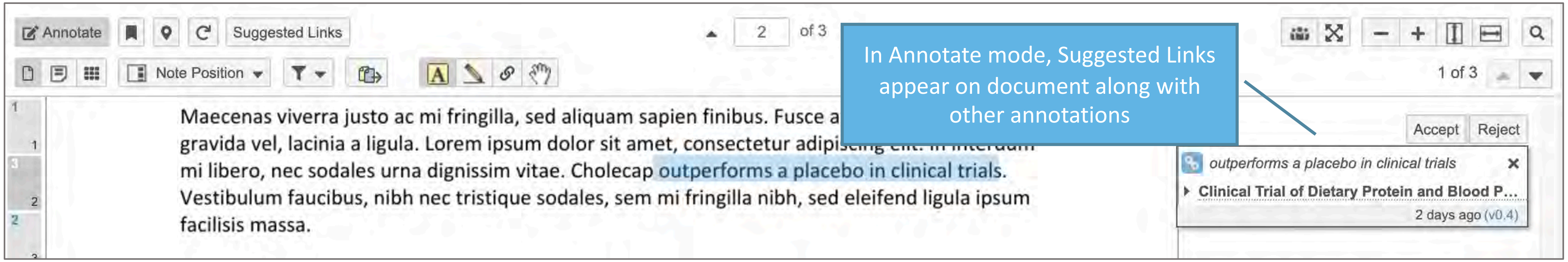
- Considerations
  - When enabled on a doctype
    - ‘*Suggest Links*’ can be performed on any version of a document with a viewable rendition
    - ‘*Suggest Links*’ action can be performed repeatedly on same version, once all Suggested Links are accepted or rejected
  - Users cannot manually create Suggested Links
  - User must refresh the page to see Suggestions
  - If matching text is repeated, each instance gets same Suggested Link

Button label becomes Suggested Links when links are returned

In *View* mode, a count of Suggested Links is displayed on button







Automated Claims Linking

- Considerations
  - Suggested Links constitute a new annotation type
    - Have a distinct visual design and no Author
    - Are visible only to users with View Content, Annotate and Edit Relationships permissions
    - Are not counted in "Annotations (Links)" or "Annotations (All)" for Library, Reporting, Workflows
  - Any user with permission can accept or reject any Suggested Link
    - This is not limited to the user who performed Suggest Links action
  - Actions available on a Suggested Link include:
    - Approve: Converts Suggested Link to Link Annotation
    - Reject: Deletes Suggested Link annotation and relationship
    - Inspect: Displays reference in context (for inspection/confirmation)
    - Close: Hides Suggested Link until page is refreshed
  - A new Annotate filter allows users to show or hide Suggested Links
  - Once a Suggested Link is accepted:
    - It becomes a Link Annotation and the Linked Document relationship is created
    - User who accepted the Suggested Link becomes the Author of the Link Annotation
  - A link created from Suggestion has a distinct icon (lightbulb instead of chain link)

Automated Claims Linking

- Configuration: User Permissions
  - Users need to have *View Content*, *View Document, Annotate* and *Edit Relationships* document permissions
    - Admin > Configuration > Document Lifecycles > [Lifecycle] > [State] > [Role]
  - User does **not** need any permission on Claims object to perform '*Suggest Links*' action

Document Lifecycles > Reference Documents > States >

Draft

Details | User Actions | Security Settings | Entry Criteria | Entry Actions

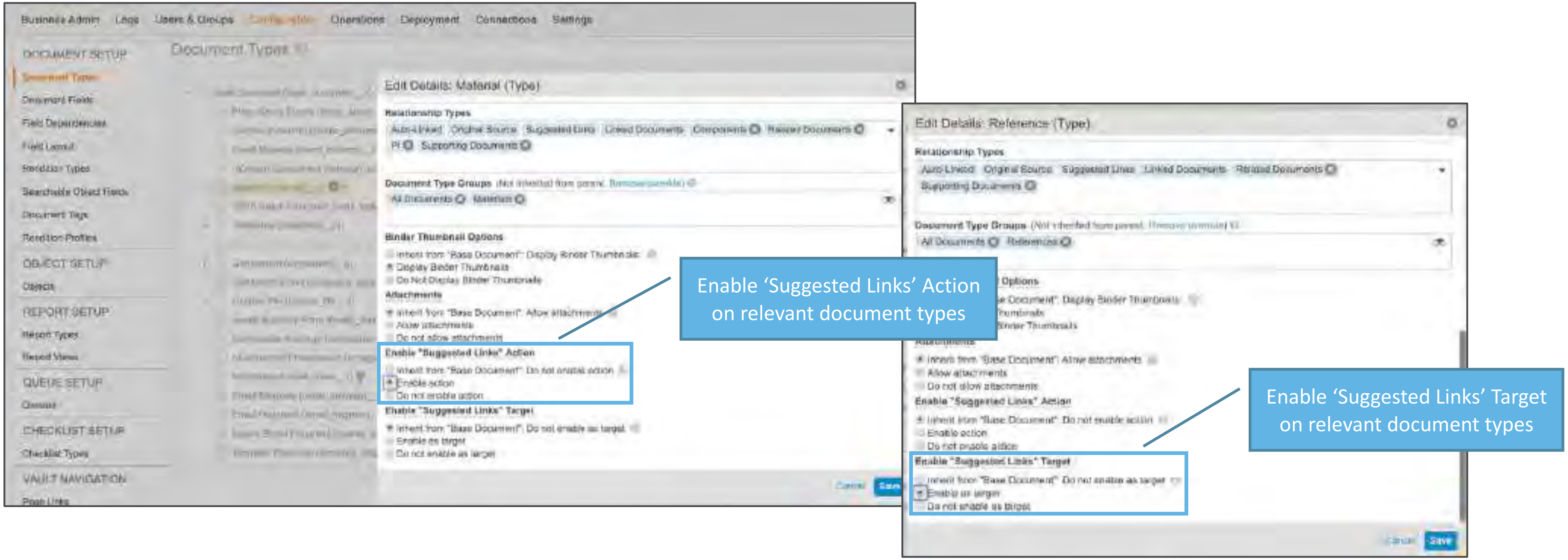
Security Settings

Edit

Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate	Create Anchors	Version	Download Source	Edit Document	Manage Viewable Rendition	Reclassify	Change St
Owner	✓	✓	✓		✓	✓	✓		✓	✓		✓	✓
Coordinator													
Editor	✓	✓	✓		✓	✓	✓		✓	✓		✓	✓
Viewer	✓	✓					✓		✓				

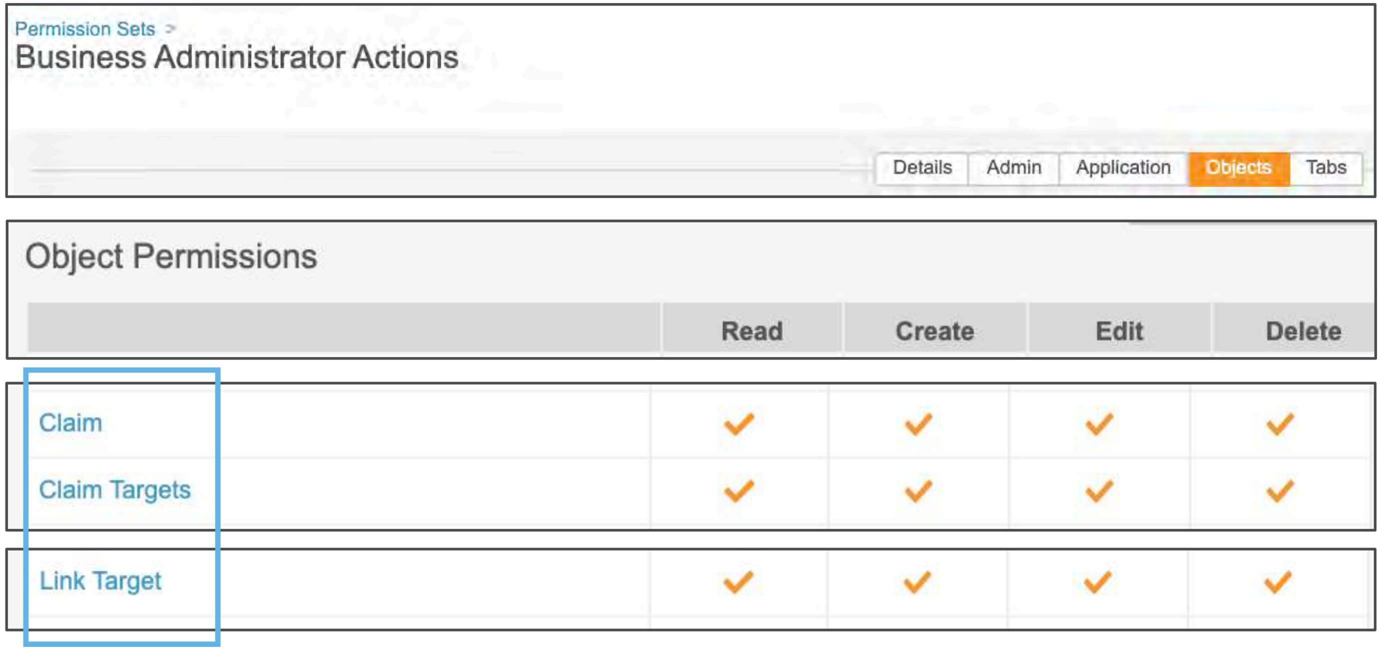
Automated Claims Linking

- Configuration: Document Types
  - Enable document types (Config > Document Types) for use of feature:
    - Enable Suggested Links **Action** on desired doctypes (e.g. *Promotional Materials*)
    - Enable Suggested Links **Target** from Claims on desired doctypes (e.g. *References*)



Automated Claims Linking

- Configuration: Claims Library Management Permission
  - Determine which Permission Sets should manage your Claims Library, and
  - Grant *Read, Create, Edit & Delete* on **all three** new objects in those Permission Sets:
    - **Claim** (annotation_keywords__sys)
    - **Claim Target** (annotation_keyword_targets__sys)
    - **Link Target** (link_target__sys)

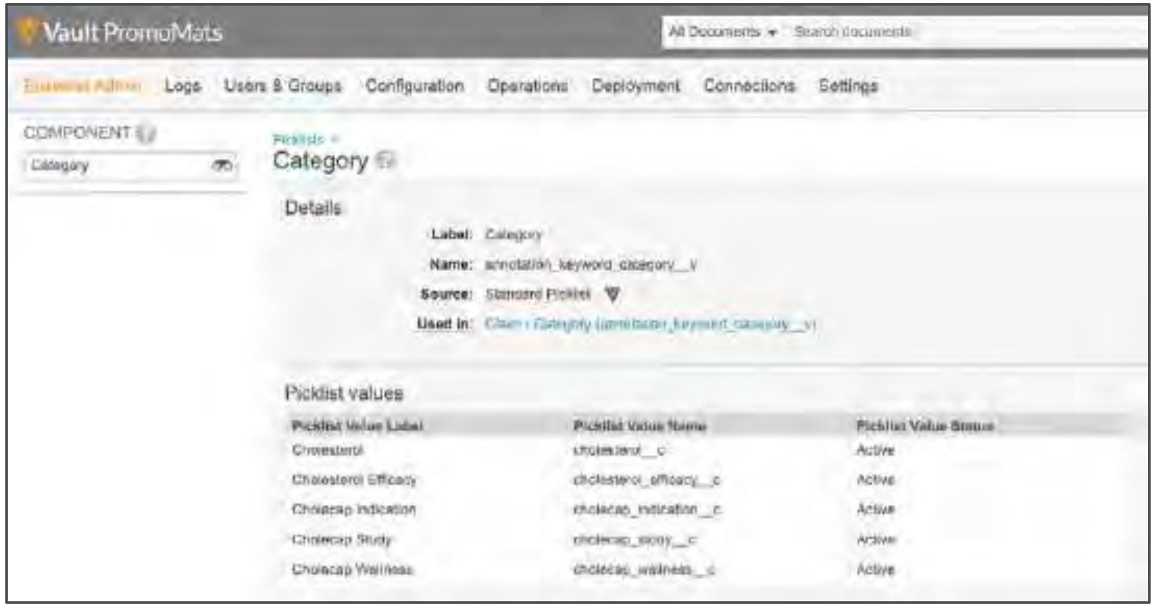

Permission Sets >
Business Administrator Actions
Details | Admin | Application | Objects | Tabs

Object Permissions

	Read	Create	Edit	Delete
Claim	✓	✓	✓	✓
Claim Targets	✓	✓	✓	✓
Link Target	✓	✓	✓	✓

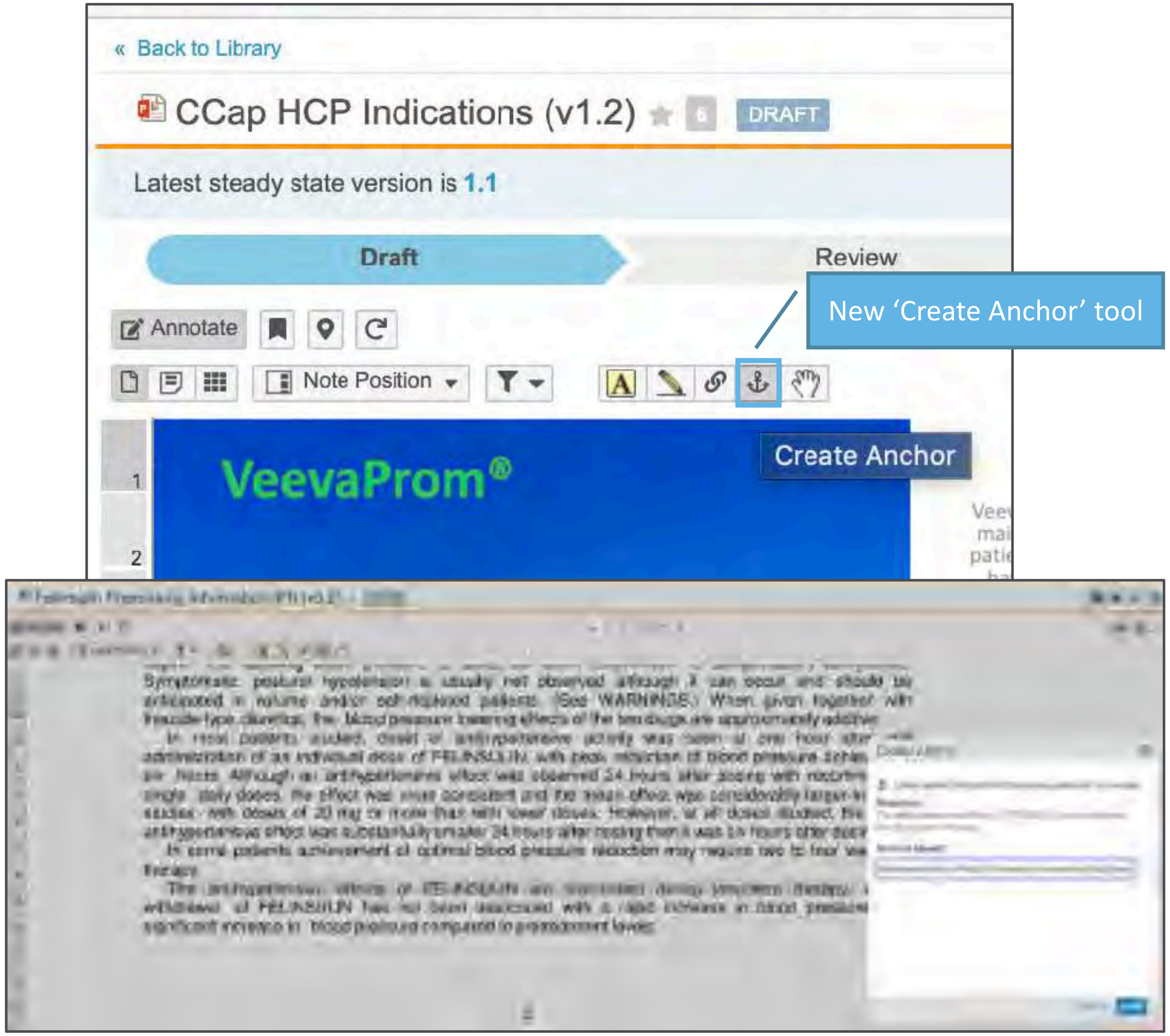
Automated Claims Linking

- Optional Configuration
  - Create Claims tab
    - To create easy access Claims Library
  - Create workflow on Claims object
    - To control review and approval)
  - Update Category picklist (annotation_keyword_category__v)
  - Add custom matching and non-matching fields to Claims object
    - Not recommended at outset



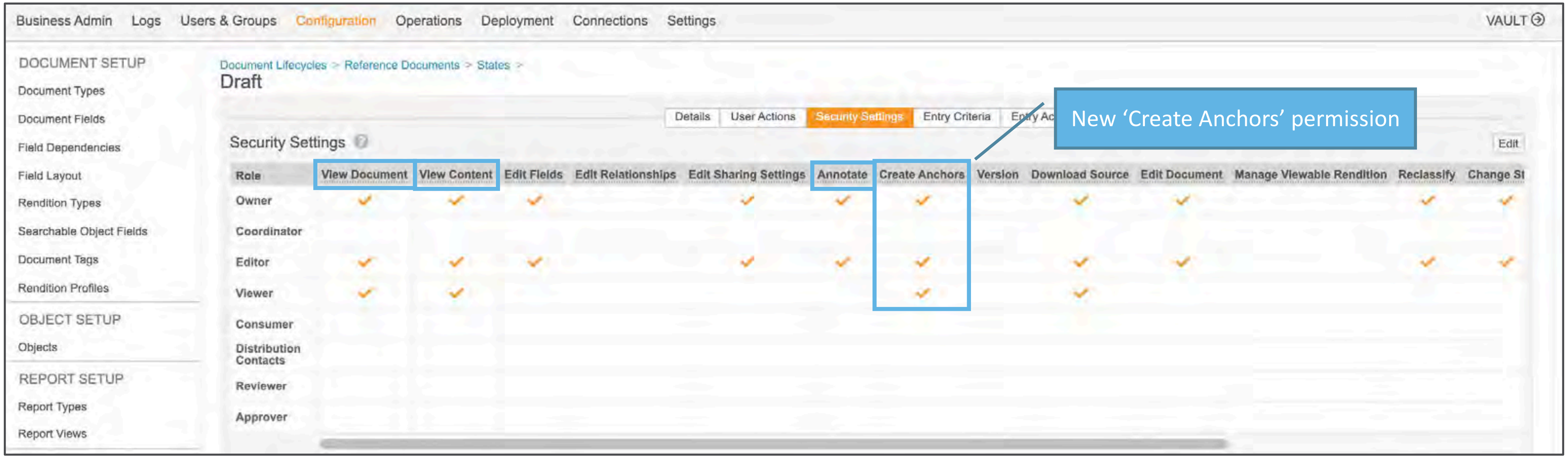
Create Anchors

- Overview
  - This new tool enables users with the proper permissions (including the new ‘Create Anchors’ permission) to create anchors on documents directly
- Impact
  - Streamlines anchor creation and gives Admins the ability to control who can create anchors, leading to a cleaner and more accurate anchor database
- Considerations
  - Anchors created with the Create Anchor tool can be either text or image selections
  - Created anchors will be available for selection in the dialog box when creating Link Annotations



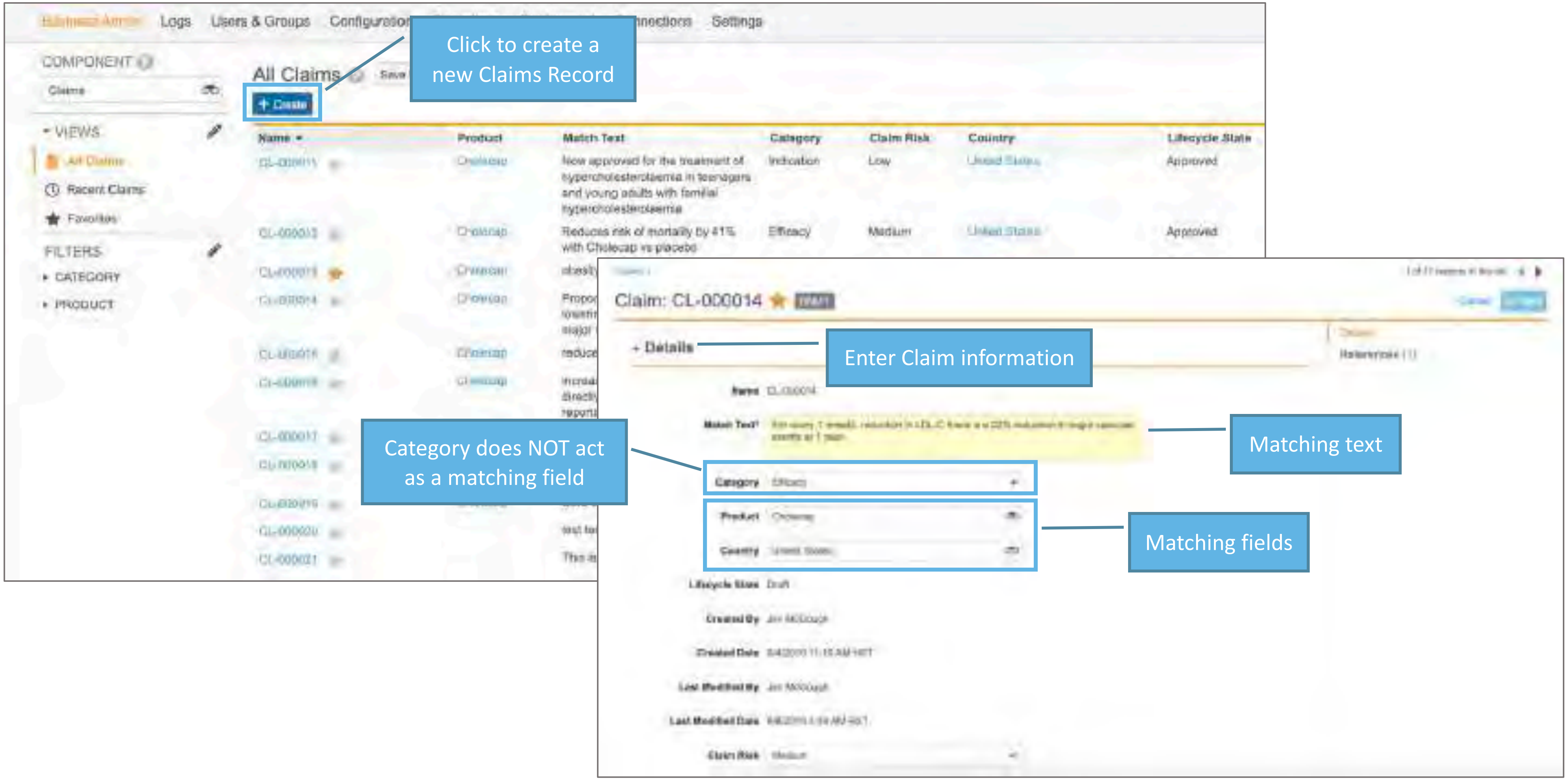
Create Anchors

- Configuration
  - Creating Anchors requires ‘*Create Anchors*’ lifecycle state permission
    - Granted by default to all roles with ‘*View Content*’
    - Admins can choose to revoke the new permission from any document lifecycle role
  - Other required permissions: *View Document* and *Annotate*
  - Admin > Configuration > Document Lifecycles > [Lifecycle] > [State] > [Role]



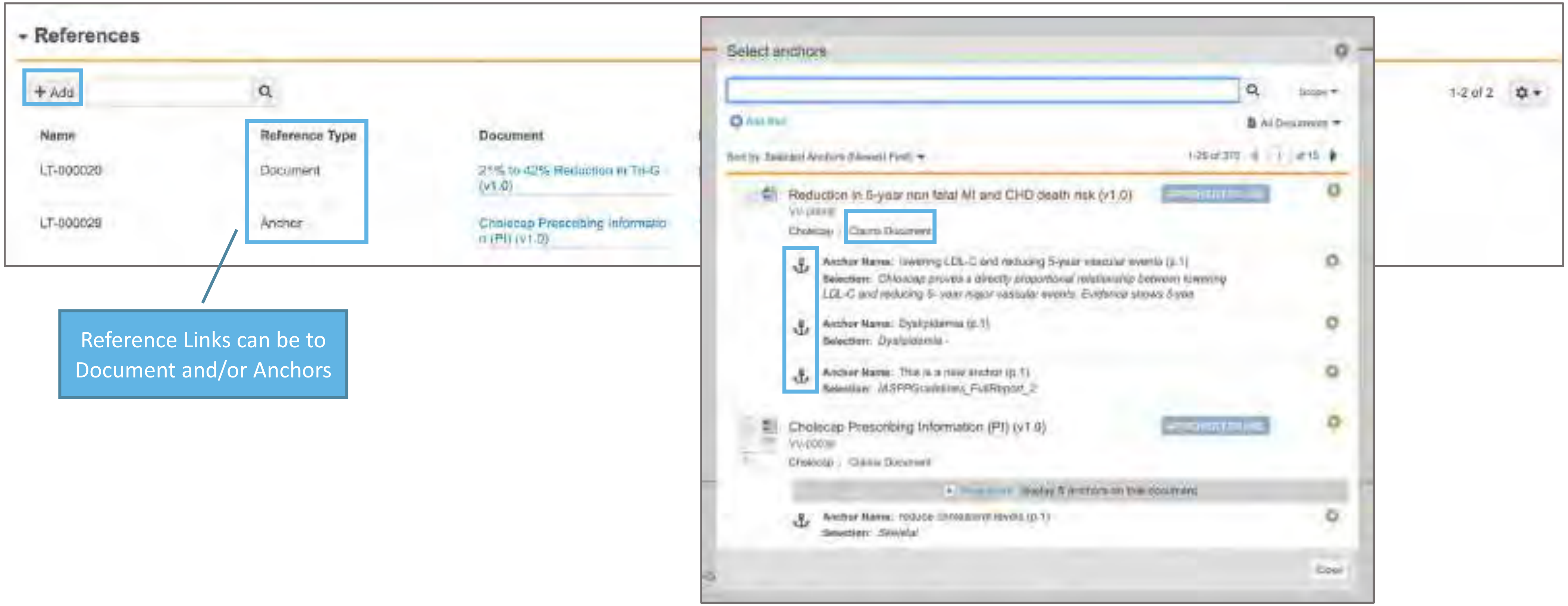
Creating Claims Records

- Individual Claims need to be created in the Claims Object



Creating Claims Records

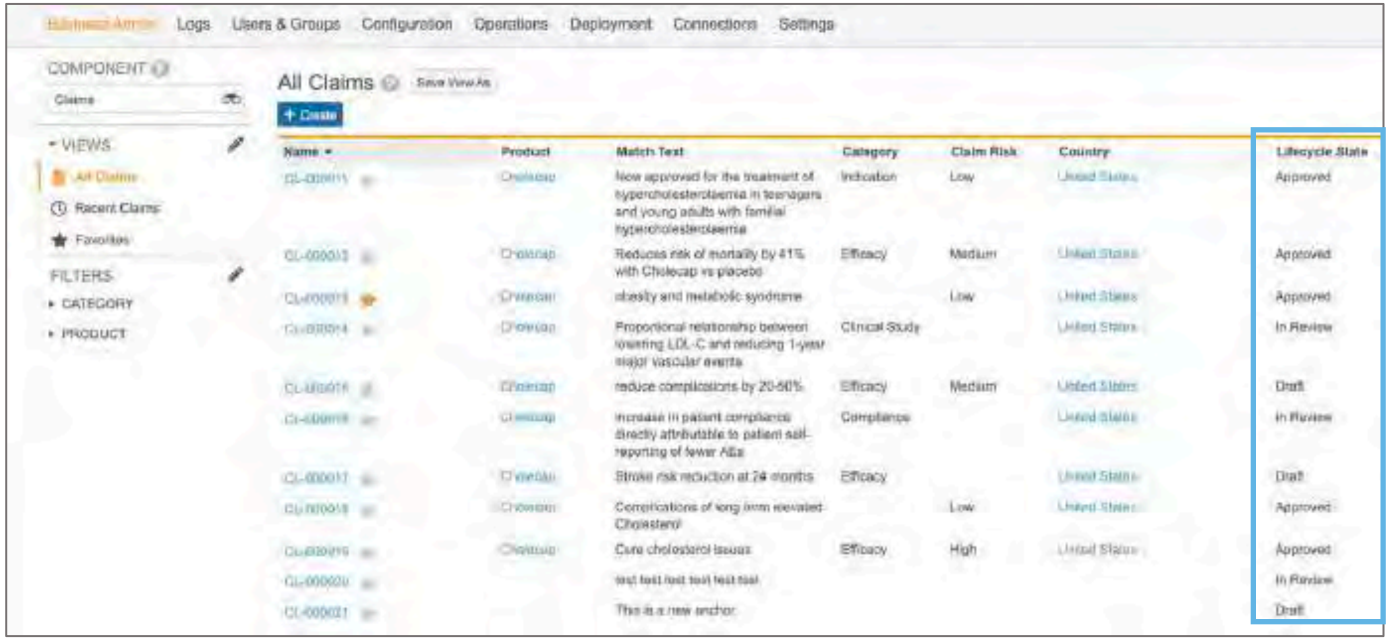
- Associate the Supporting Reference (pre-existing Reference Documents and/or Anchors) to the Claim

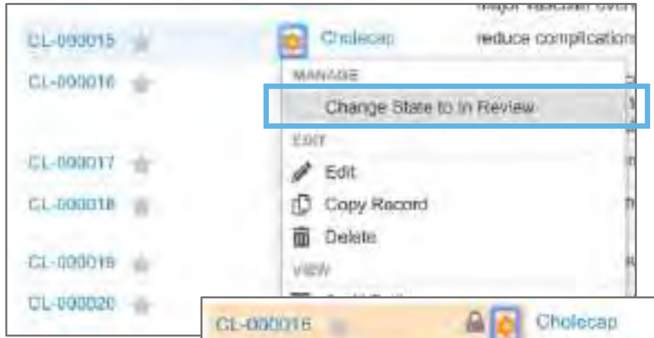


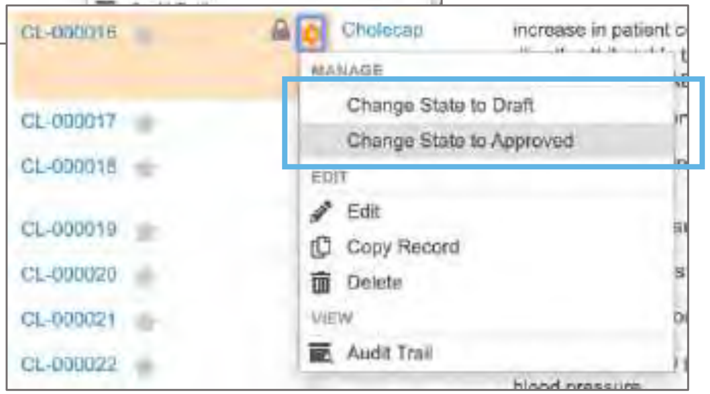
Reference Links can be be to Document and/or Anchors

Creating Claims Records

- Claims must be in an Approved State before Vault will use them as a Suggested Link



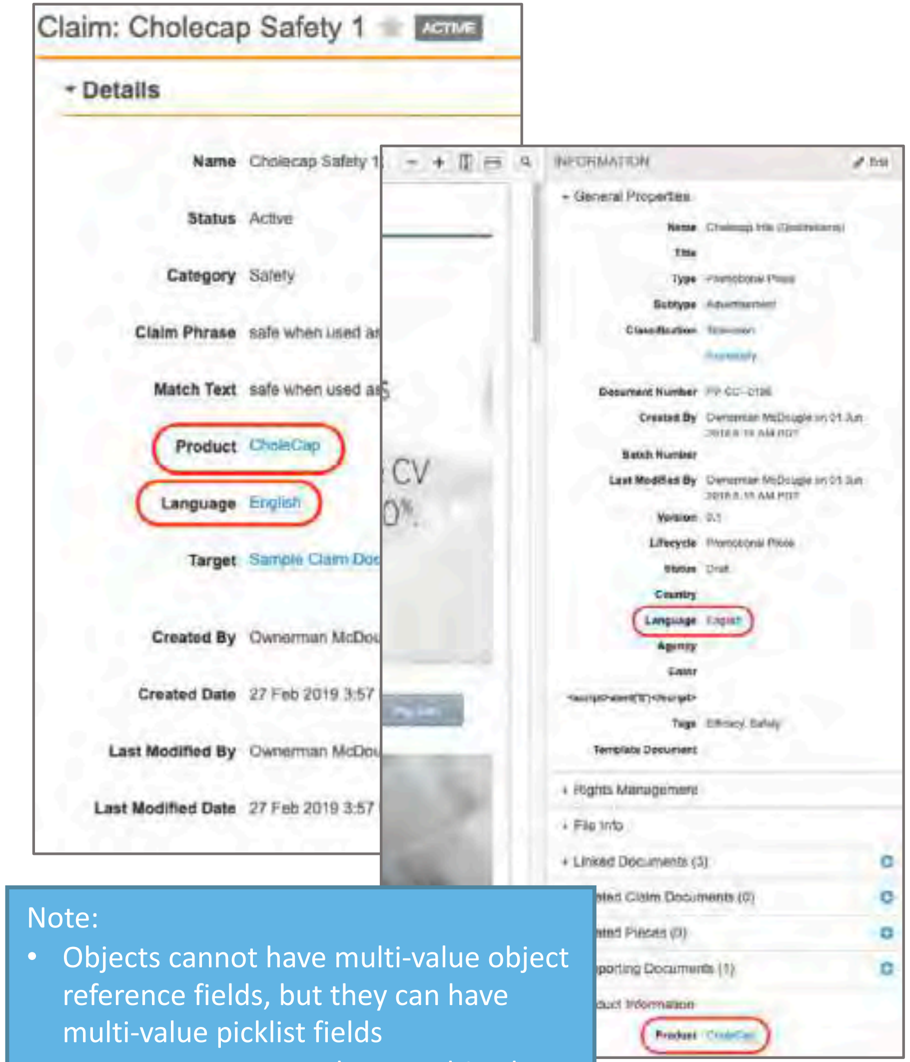




Bulk action can be used to perform state change

Creating Claims Records

- All* picklist and object reference fields (both standard and custom) can function as matching
  - Picklist or object reference fields must exist on the Claim and Document to be used in matching
- All matching fields must match in order for Claim and document to match
- Blank matching fields operate as wildcards on Claims, but <u>not</u> on documents
  - Blank on Claim / populated on Document: constitutes a match
  - Populated on Claim / Blank on Document: non-match
  - On multi-value fields, partial matches constitute a match
    - Example: “Condition” on Claim is "fever, headache" and “Condition” on document is "fever, fatigue”: match
- Max of 5 custom fields
  - Contact Support if more are needed



Note:
- Objects cannot have multi-value object reference fields, but they can have multi-value picklist fields
- Document types can have multi-value object reference <u>and</u> picklist fields

*Exception: ‘Category’ is not used in matching (even if Category exists on documents)

Creating Claims Records

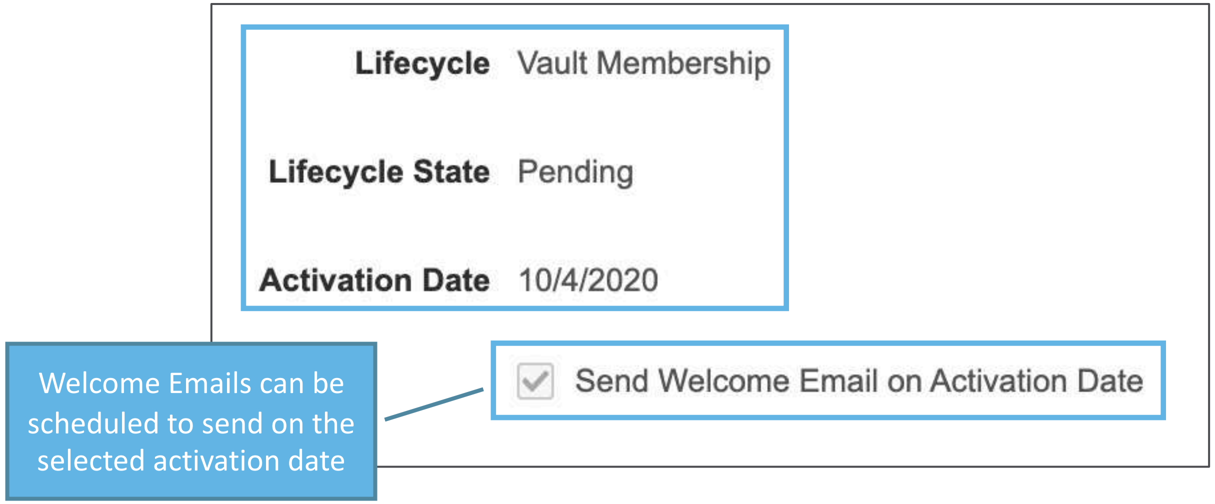
Match Fields Matrix

"Symptom"	Multi-value picklist on both Claim and Doctype.)								
	Doc	(blank)	fever	headache	fatigue	fever, headache	fever, fatigue	headache, fatigue	fever, headache, fatigue
Claim									
(blank)		match	match	match	match	match	match	match	match
fever		non-match	match	non-match	non-match	match	match	non-match	match
headache		non-match	non-match	match	non-match	match	non-match	match	match
fever, headache		non-match	match	match	non-match	match	match	match	match
fever, fatigue		non-match	match	non-match	match	match	match	match	match
headache, fatigue		non-match	non-match	match	match	match	match	match	match

"Product"	Single-value object reference on Claim; multi-value object reference on Doctype.								
	Doc	(blank)	Cholecap	Restolar	Zylocap	Cholecap, Restolar	Cholecap, Zylocap	Restolar, Zylo	Cholecap, Restolar, Zylocap
Claim									
(blank)		match	match	match	match	match	match	match	match
Cholecap		non-match	match	non-match	non-match	match	match	match	match
Restolar		non-match	non-match	match	non-match	match	non-match	match	match
Zylocap		non-match	match	match	match	match	match	match	match

User Pending State

- Overview
  - A new ‘Pending’ state has been added to the Vault Membership lifecycle, which allows Admins to create new users via the Business Admin User Object in advance of the user’s activation

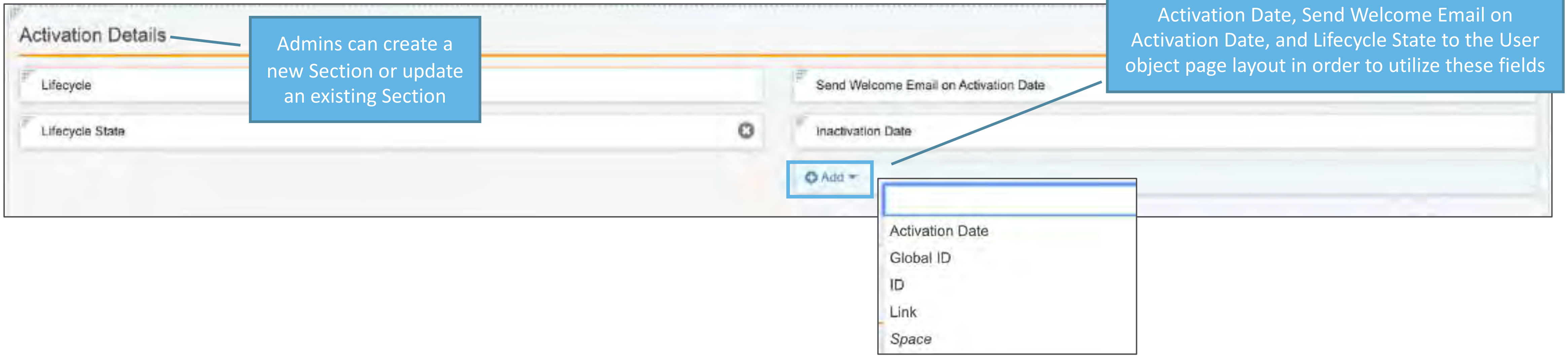


- Impact
  - Admins can assign new users to groups and assign sharing settings and delay activation until requirements are met or a specific date is reached
- Use Case
  - During an acquisition, users can be created and set-up to become active on a specific date or once training has been completed

User Pending State

- Configuration
  - Admin > Configuration > Objects > User > Page Layouts > User Detail Page Layout > Add required fields to the appropriate section

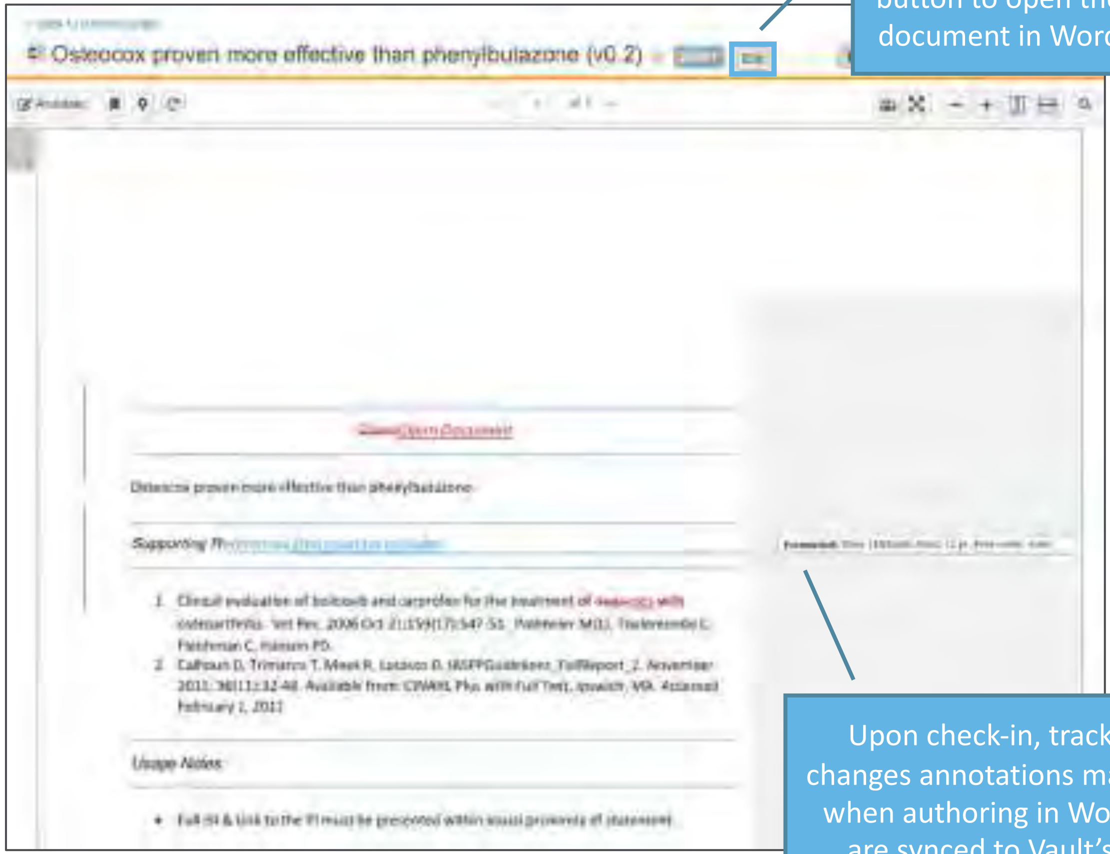
Admins must add the new fields: Activation Date, Send Welcome Email on Activation Date, and Lifecycle State to the User object page layout in order to utilize these fields



Collaborative Authoring with Microsoft Office

- Overview
  - Collaborative Authoring connects Vault to the Office 365™ server, allowing customers to leverage their Office 365 tenant and provide a collaborative workspace for Word documents
- Impact
  - Multiple users will be able to author/edit Microsoft Word documents simultaneously using Office desktop software, Office Online™, or the Office mobile apps

When another user opens the document, you will see an icon appear in the Microsoft Word menu bar



Click the new 'Edit' button to open the document in Word

Upon check-in, track changes annotations made when authoring in Word are synced to Vault's Viewable Rendition

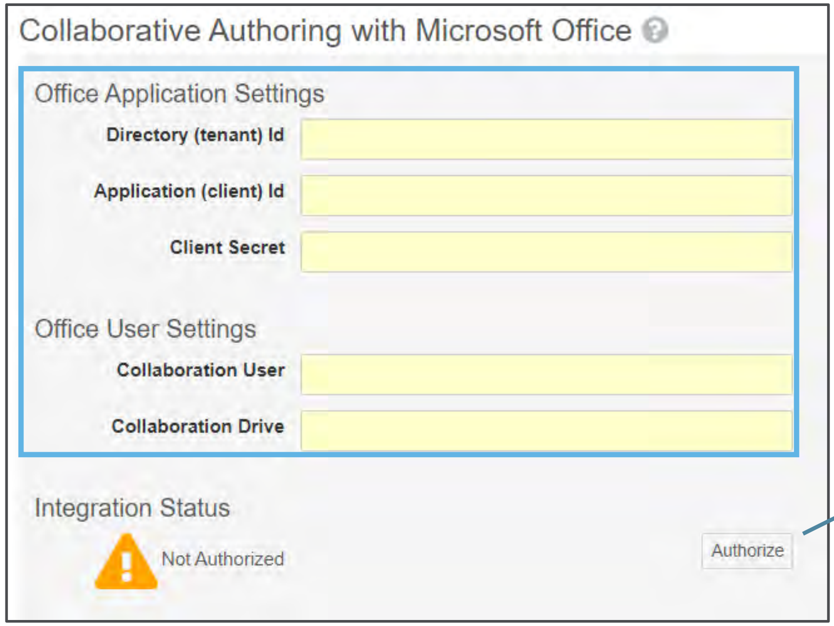
Collaborative Authoring with Microsoft Office

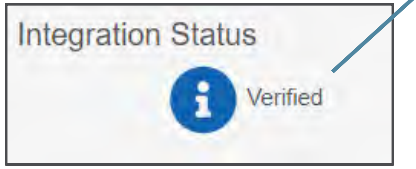
- Considerations
  - You must have an Office 365 tenant to use this feature
  - Only Microsoft Word documents (*.docx) are currently supported
  - Only users with Edit and Download permissions can work on documents
    - When multiple users are editing a document, any user can check in the document and end the collaboration session for all users
    - Once the session has ended, any additional changes made in Microsoft Word will not be saved in Vault
  - The first time you use collaborative authoring, a pop-up window will inform you that the document is opening in Microsoft Office
    - Click **Continue** to open the document in Microsoft Word on your desktop
    - Keep your Vault browser window open while you edit
  - When viewing a checked-out document, the Create Draft option will not appear in the Actions menu

Collaborative Authoring with Microsoft Office

- Configuration
  - Work with your IT team to obtain the required tenant values
  - Go to Admin > Settings > Checkout Settings > Enter tenant details
  - Click on Authorize to check the connection
  - Click on Save

Enter the tenant details

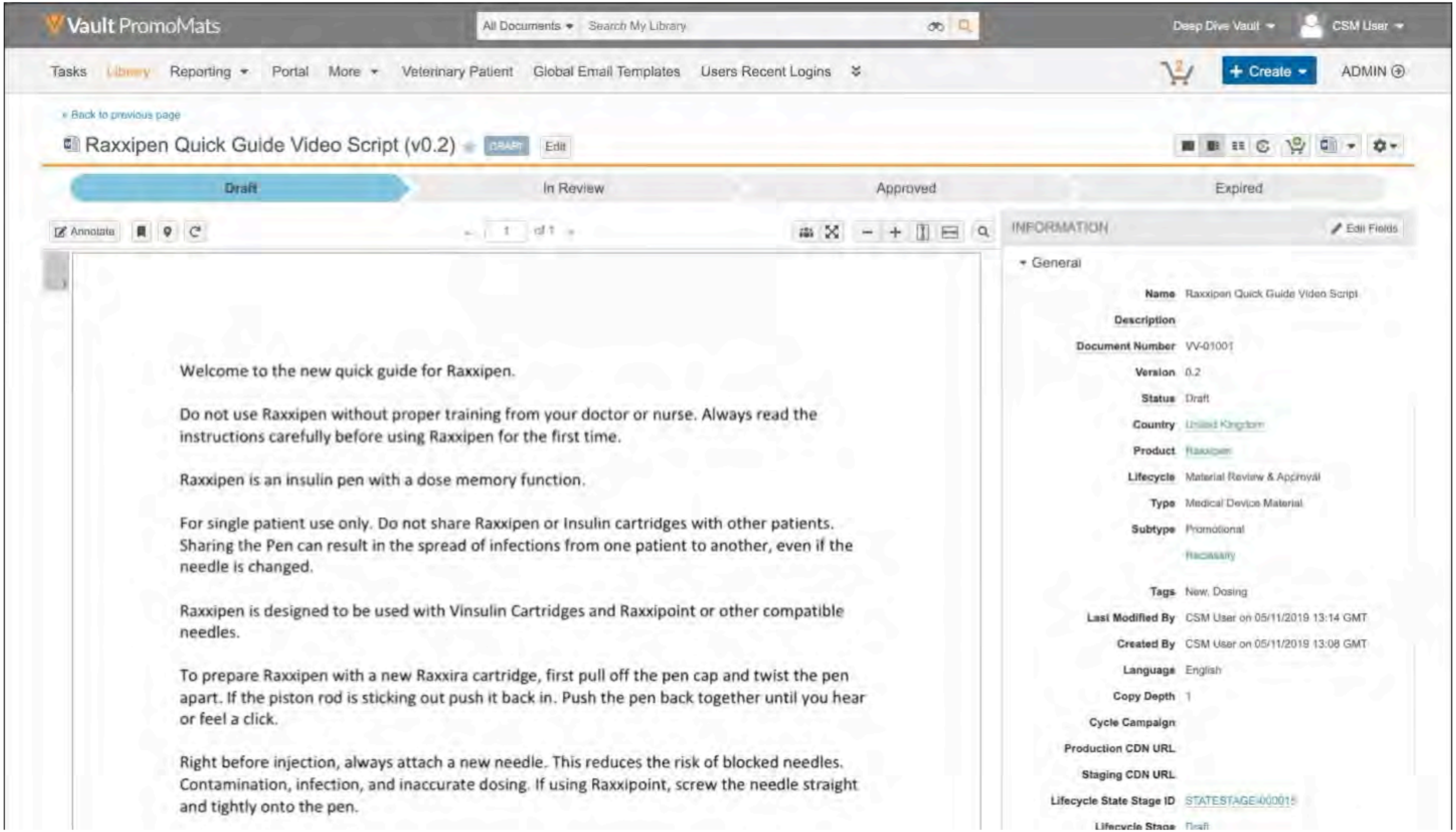




If the connection is successful, the status of the integration will change to Verified and you'll be able to save your changes

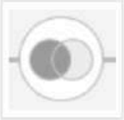
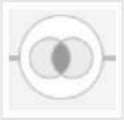
Click on Authorize to check the connection

Collaborative Authoring with Microsoft Office



Multi-Pass Reporting Enhancements

- Overview
  - Admins can now:
    - Select inner join in addition to left join when joining report views
    - Create report views from Workflow Reports
    - Add groups to report views
    - Join report views by text fields
    - Define conditional fields in both report views and multi-pass reports
    - Select inner join in addition to left join when joining report views
    - Filter on aggregate fields defined in report views
- Impact
  - Provides Admins with more options and flexibility when creating reports
- Learn more about Multi-Pass Reporting

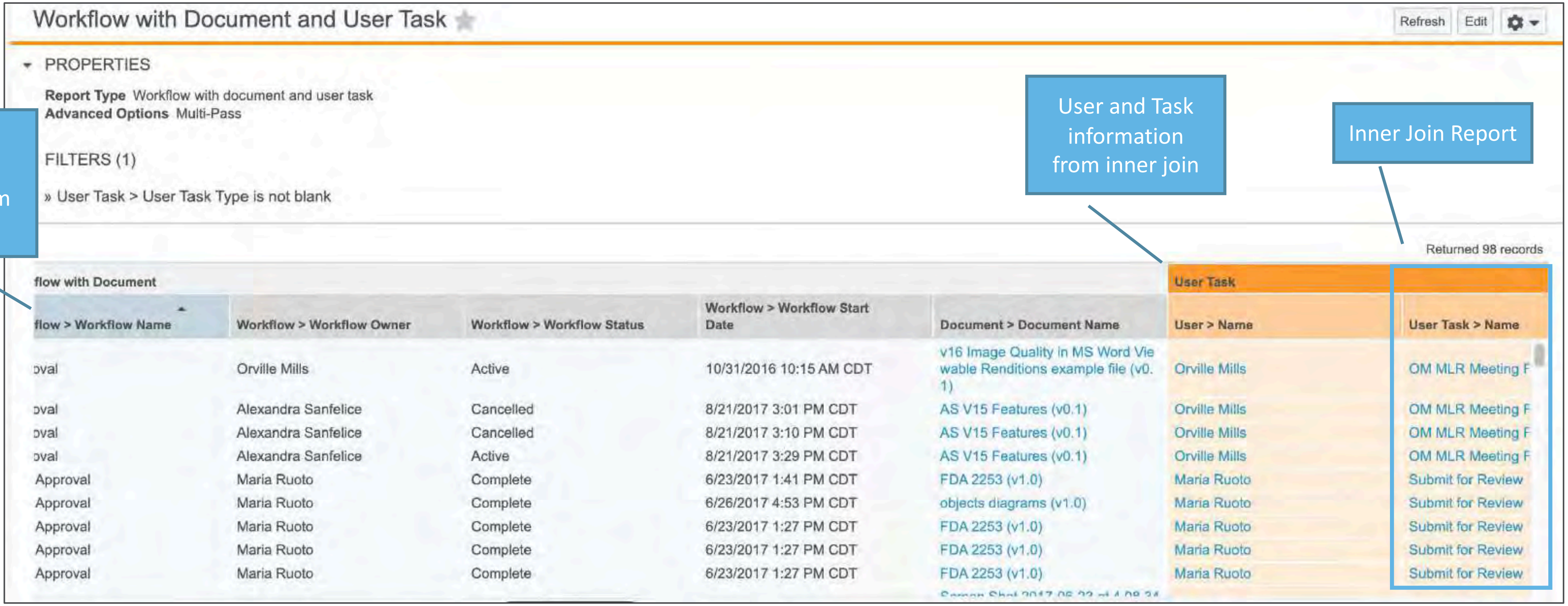
Join	Description	Diagram
Left	Vault returns all records from the view on the left side of the relationship and only records with matching fields from the view on the right side of the relationship.	
Inner	Vault returns records that have matching values from both views.	

Multi-Pass Reporting Enhancements

Workflow with Document Information from original join

User and Task information from inner join

Inner Join Report



Workflow with Document and User Task

Refresh | Edit

PROPERTIES

Report Type Workflow with document and user task
Advanced Options Multi-Pass

FILTERS (1)

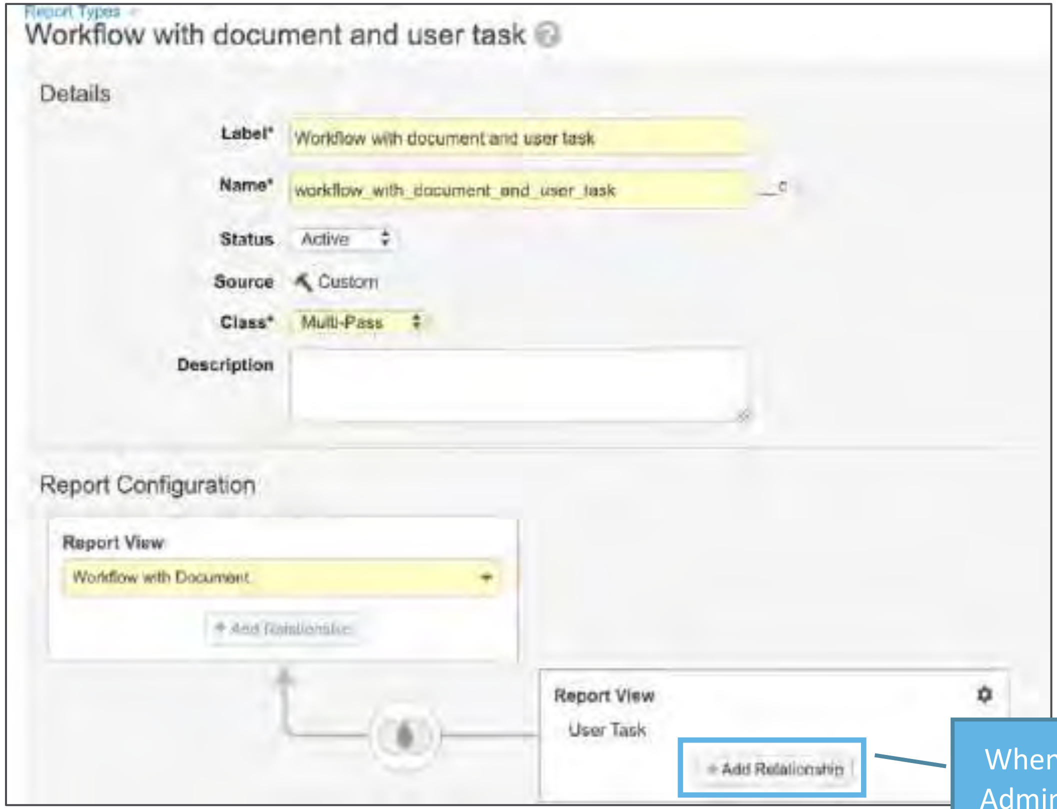
» User Task > User Task Type is not blank

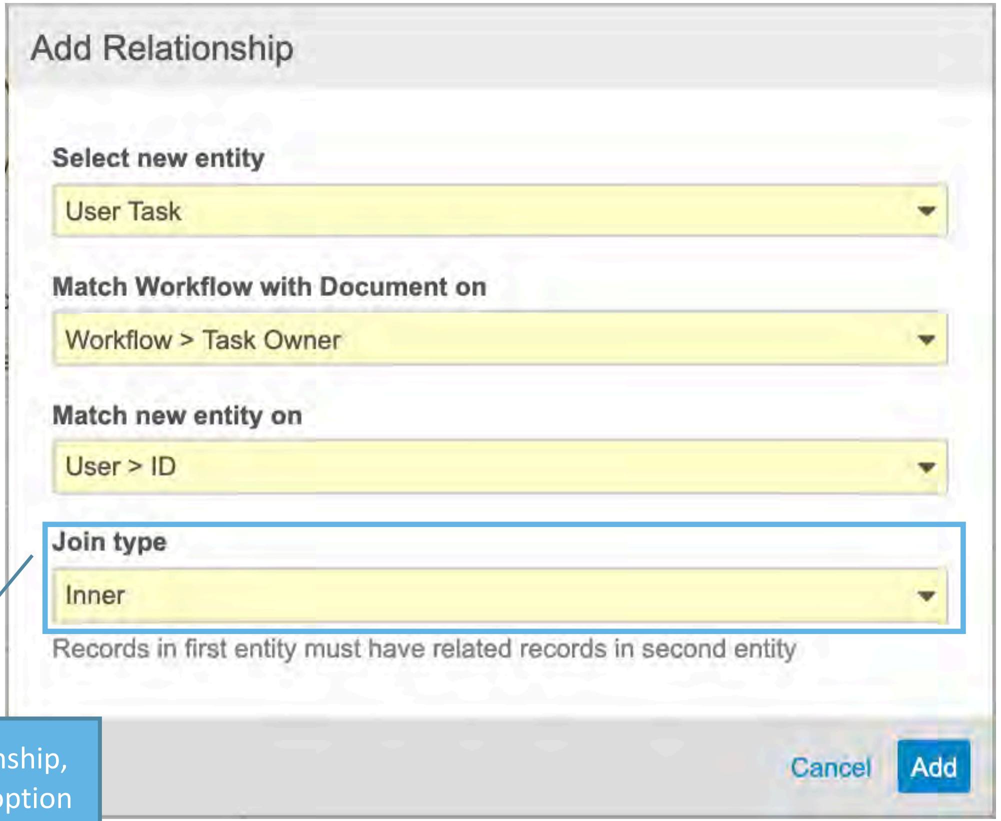
Returned 98 records

flow with Document					User Task	
flow > Workflow Name	Workflow > Workflow Owner	Workflow > Workflow Status	Workflow > Workflow Start Date	Document > Document Name	User > Name	User Task > Name
oval	Orville Mills	Active	10/31/2016 10:15 AM CDT	v16 Image Quality in MS Word Viewable Renditions example file (v0.1)	Orville Mills	OM MLR Meeting F
oval	Alexandra Sanfelice	Cancelled	8/21/2017 3:01 PM CDT	AS V15 Features (v0.1)	Orville Mills	OM MLR Meeting F
oval	Alexandra Sanfelice	Cancelled	8/21/2017 3:10 PM CDT	AS V15 Features (v0.1)	Orville Mills	OM MLR Meeting F
oval	Alexandra Sanfelice	Active	8/21/2017 3:29 PM CDT	AS V15 Features (v0.1)	Orville Mills	OM MLR Meeting F
Approval	Maria Ruoto	Complete	6/23/2017 1:41 PM CDT	FDA 2253 (v1.0)	Maria Ruoto	Submit for Review
Approval	Maria Ruoto	Complete	6/26/2017 4:53 PM CDT	objects diagrams (v1.0)	Maria Ruoto	Submit for Review
Approval	Maria Ruoto	Complete	6/23/2017 1:27 PM CDT	FDA 2253 (v1.0)	Maria Ruoto	Submit for Review
Approval	Maria Ruoto	Complete	6/23/2017 1:27 PM CDT	FDA 2253 (v1.0)	Maria Ruoto	Submit for Review
Approval	Maria Ruoto	Complete	6/23/2017 1:27 PM CDT	FDA 2253 (v1.0)	Maria Ruoto	Submit for Review

Multi-Pass Reporting Enhancements

- Configuration
  - Admin > Configuration > Report Types

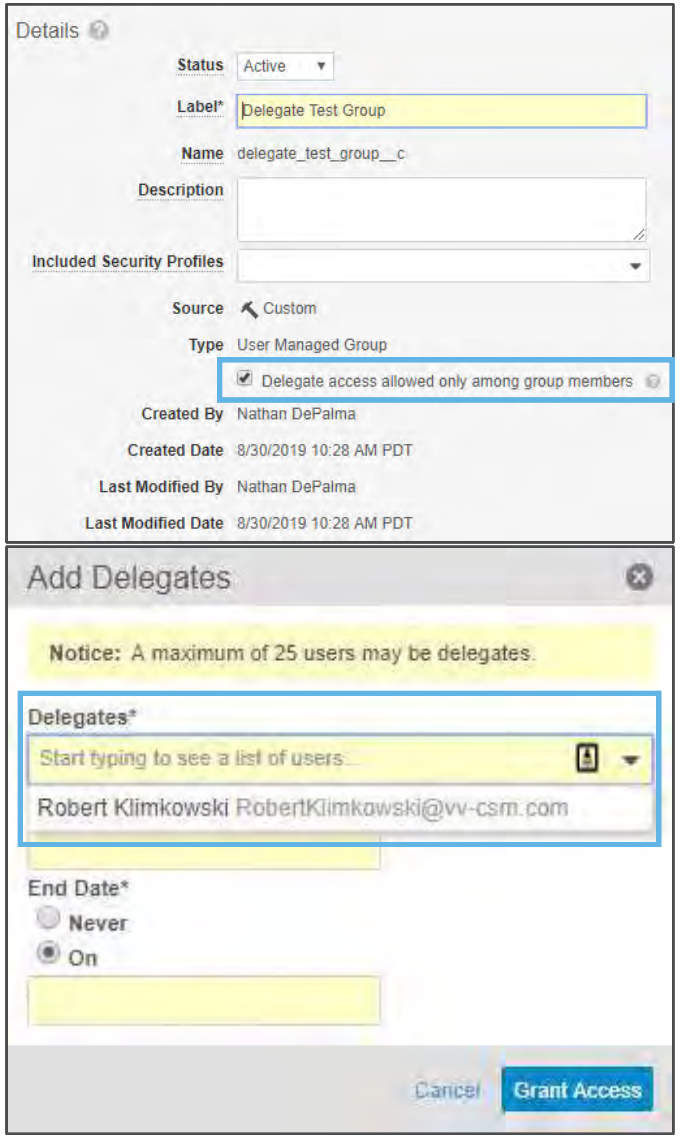




When adding a relationship, Admins now have the option to relate additional information and can select a Left or inner join type

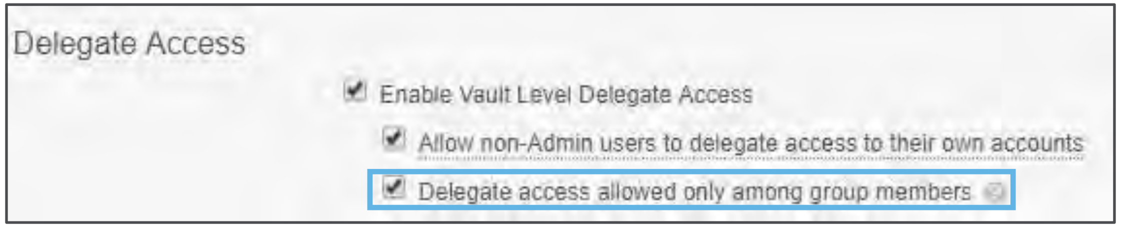
Delegate Access: Restrict Delegate Selection

- Overview
  - This feature allows organizations to define groups of users who can only delegate access amongst themselves
- Impact
  - Provides more control over who users can assign as a delegate, by ensuring only defined group members can be selected
- Use Case
  - Restrict delegate assignments by country and team
    - UK Medical reviewers can only select delegates who are members of that UK Medical Reviewer group

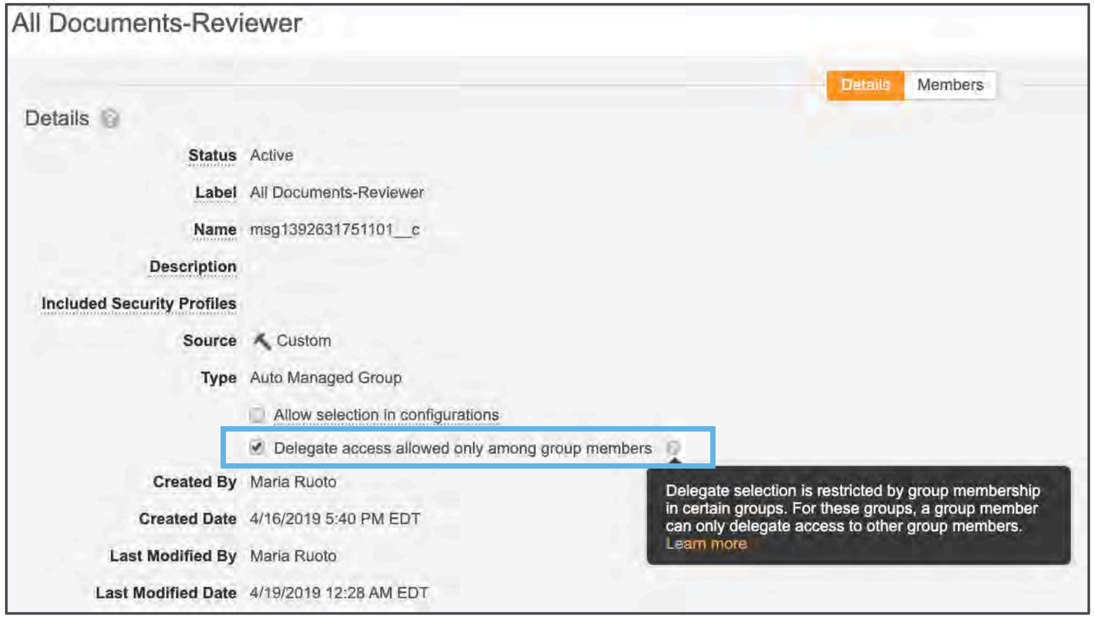


Delegate Access: Restrict Delegate Selection

- Considerations
  - Users need to have the "Allow as delegate" permission and group assignment in order to be selected as delegate
  - Users who are members of multiple groups can delegate to members of all their groups
  - Delegate restrictions are enforced in both user profile and Admin
  - Vault does not cancel a users' delegated access if their group membership changes after they were assigned as a delegate
- Configuration
  - Admin > Settings > General > Delegate Access



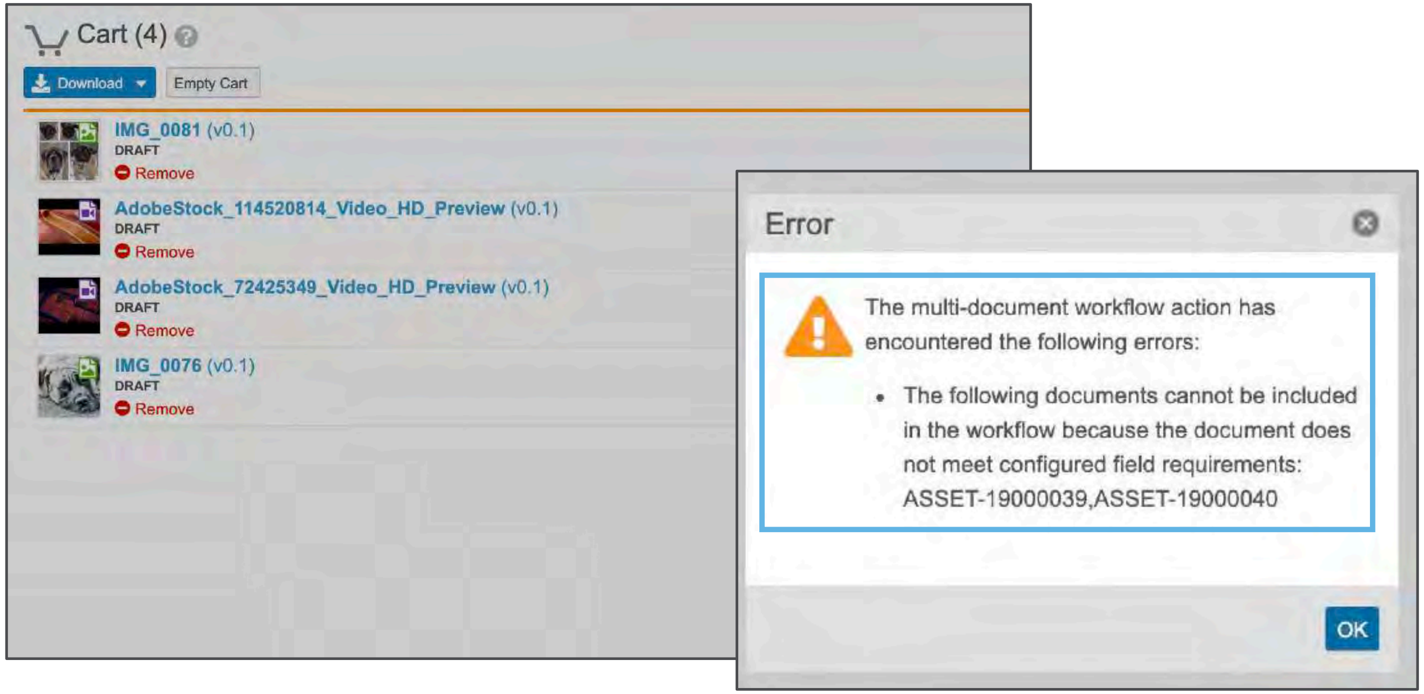
  - Admin > Users & Groups> Groups



- Learn more about [Delegate Access]

MDW: Constrain Multi-Document Workflow Based on Document Status & Field Values

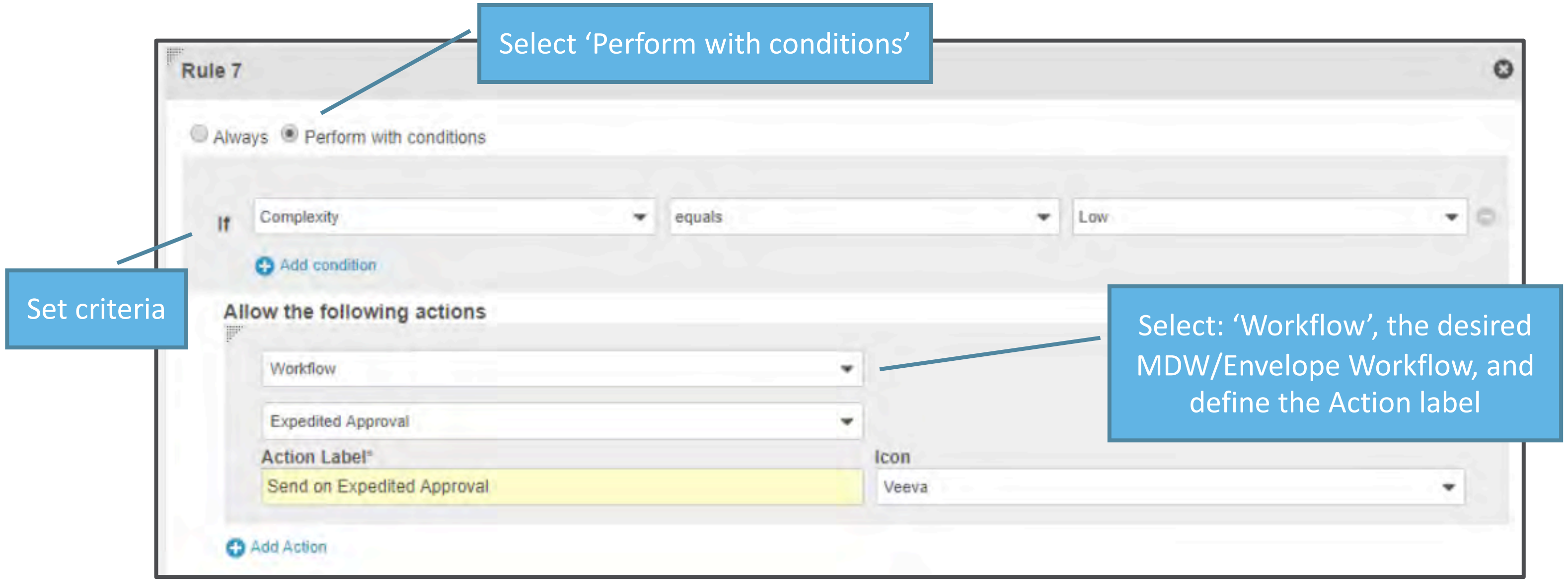
- Overview
  - Admins can now set constraints on documents that can be included in a Multi-Document Workflow based on document status and field values
  - If a user attempts to start a Multi-Document Workflow with documents that are outside of the set parameters, they will receive an error message



- Impact
  - Reduced risk of the incorrect documents being included in the MDW envelope

MDW: Constrain Multi-Document Workflow Based on Document Status & Field Values

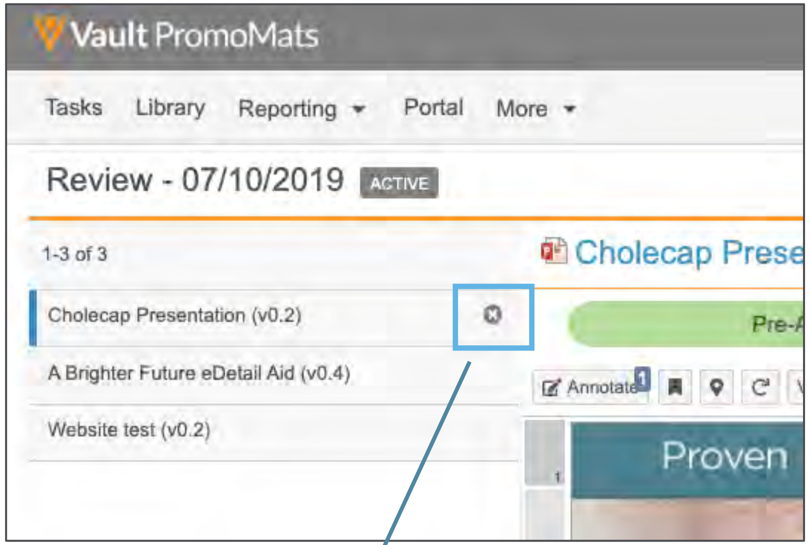
- Use Case
  - A workflow can be configured with a user action on the "Draft" state available, only if the field *Complexity Required equals* "Low," then only documents that meet those criteria can be added to the workflow
- Considerations
  - The Multi-Document Workflow you want to use must be configured prior to creating the user action



- Configuration
  - Admin > Configuration > Document Lifecycles > [Lifecycle] > [State] > User Actions

MDW: Remove Documents from Envelope

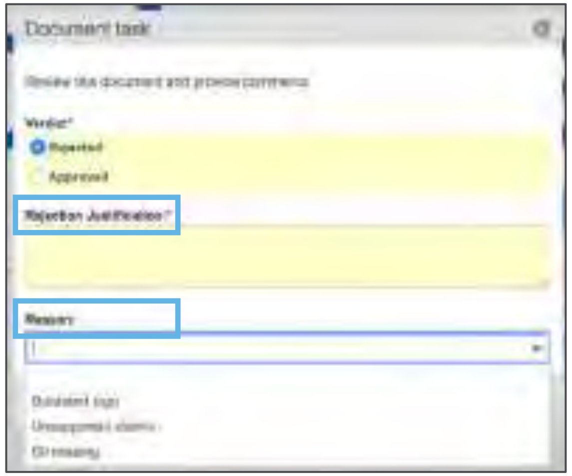
- Overview
  - Workflow initiators now have the option to remove one or more documents from an envelope once a Multi-Document Workflow has started
- Impact
  - Multi-Document Workflows no longer need to be canceled if a document needs to be removed from the envelope
- Considerations
  - Removal of documents is not reversible
  - If an envelope contains only a single document, you cannot remove it
  - Learn more about [Using Multi-Document Workflows]

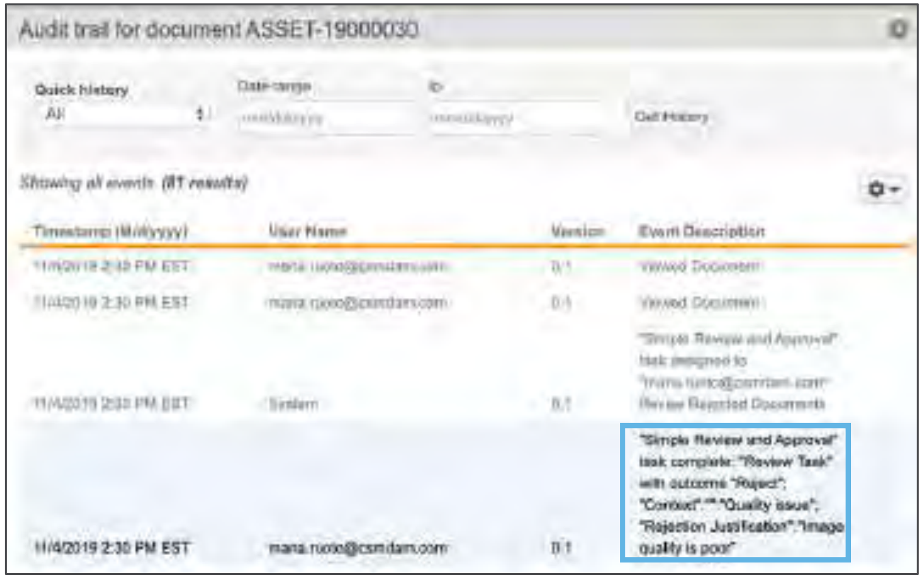


Introduction of new button to remove one or more documents from an envelope

MDW: Verdict-Based Prompt for Comments and Reasons

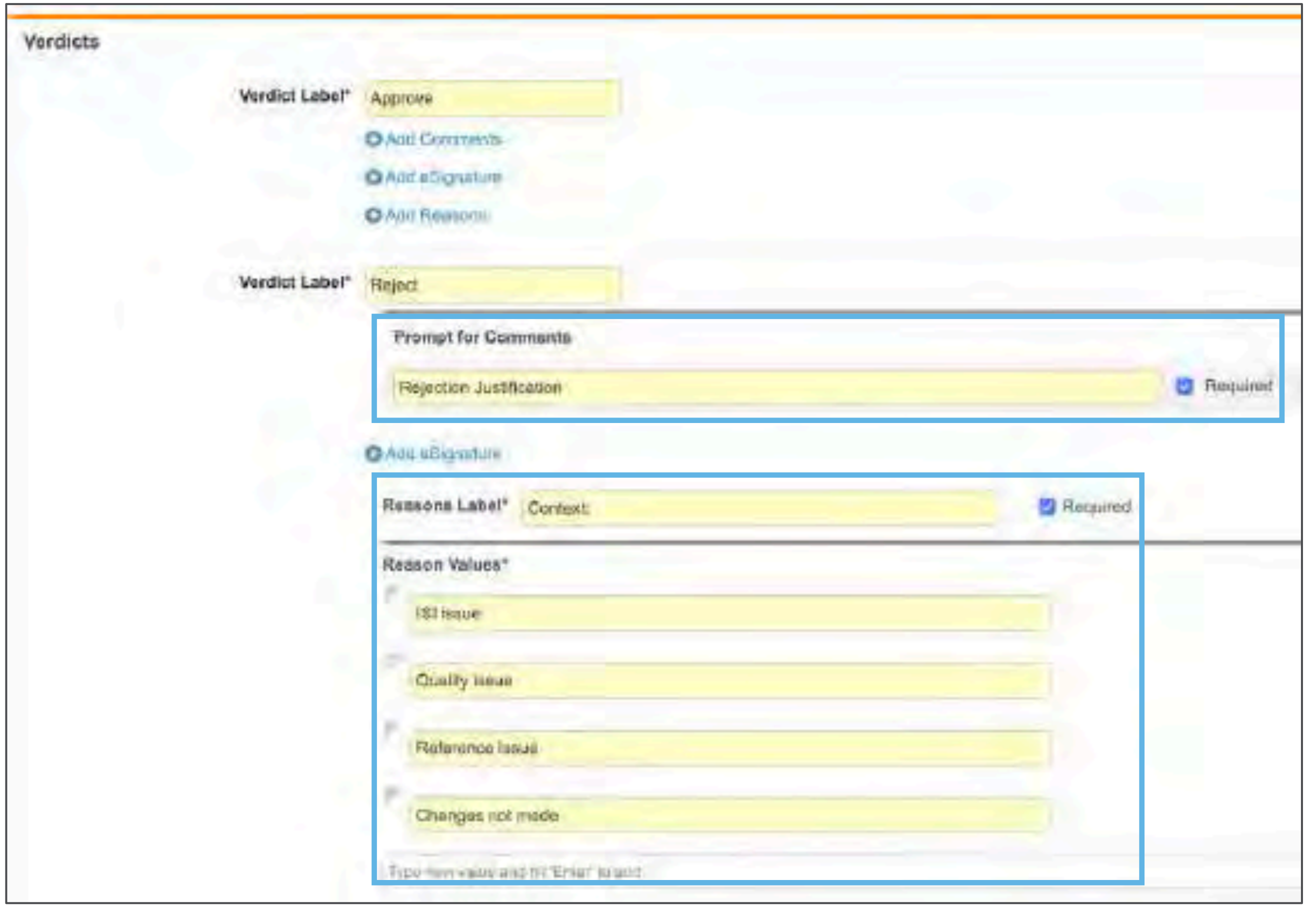
- Overview
  - Multi-Document Workflows can now be configured to include Verdict Comments and Reasons based on the verdict selected by the task owner
- Impact
  - If configured, users will be able to provide additional context around their verdict, helping document owners address issues more efficiently
- Use Case:
  - If a task owner selects the Reject verdict for a document, a Rejection Justification could be required
- Considerations
  - Owners can view Comments and Reasons in the Audit Trail





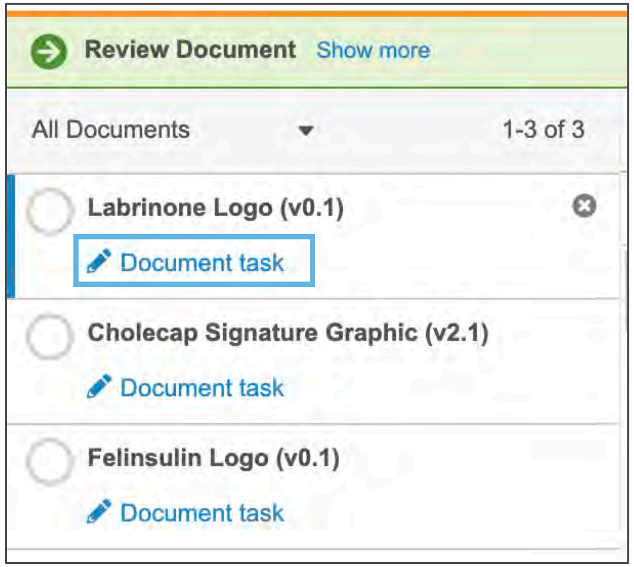
MDW: Verdict-Based Prompt for Comments and Reasons

- Configuration
  - Admin > Configuration > Multi-document Workflows > [Workflow] > Document Task > Document Prompts > Verdicts



MDW: Updated Envelope Viewer

- Overview
  - In order to support the ability to capture Verdict Comments and Reasons, the Multi-Document Workflow Envelope Viewer now includes a ‘Document task’ link for each document
- Impact
  - Upon clicking, a dialog box will open and prompt Task Owners for required inputs
- Considerations
  - Prior to this release, task owners selected verdicts for each document directly from the list of documents in the viewer
    - They now need to click on the “Document Task” link to provide all of the required input
  - When hovering over the document name, users can see their selected verdict and any provided reasons/comments without having to open the dialog

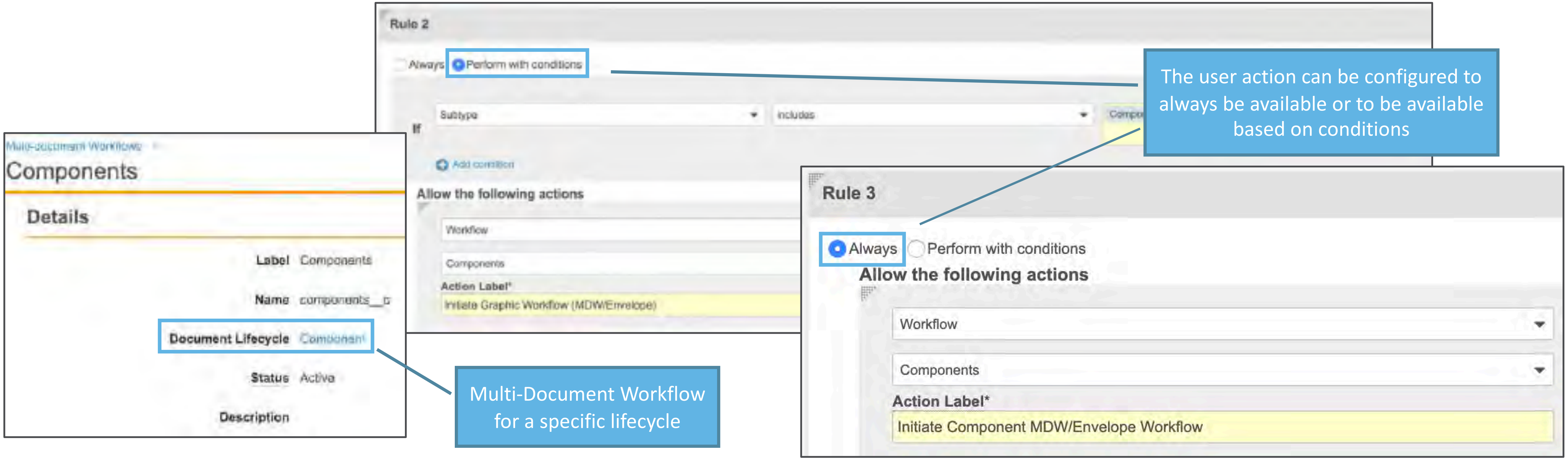


MDW: Start Multi-Document Workflow on a Single Document

- Overview
  - Workflow initiators can now initiate a Multi-Document Workflow on a single document
    - In a future release, Multi-Document Workflows are going to be renamed to ‘Envelope Workflows’ to reflect new way this type of workflow can be used
- Impact
  - Admins can now create a single workflow to manage cases for single or multiple documents, so they will not have to manage two separate processes, streamlining the configuration and initiation of workflows, reducing maintenance
- Use Case
  - Admins can configure an Multi-Document Workflow for documents that use the Reference Document Lifecycle and use that workflow for both single and multi-documents reviews

MDW: Start Multi-Document Workflow on a Single Document

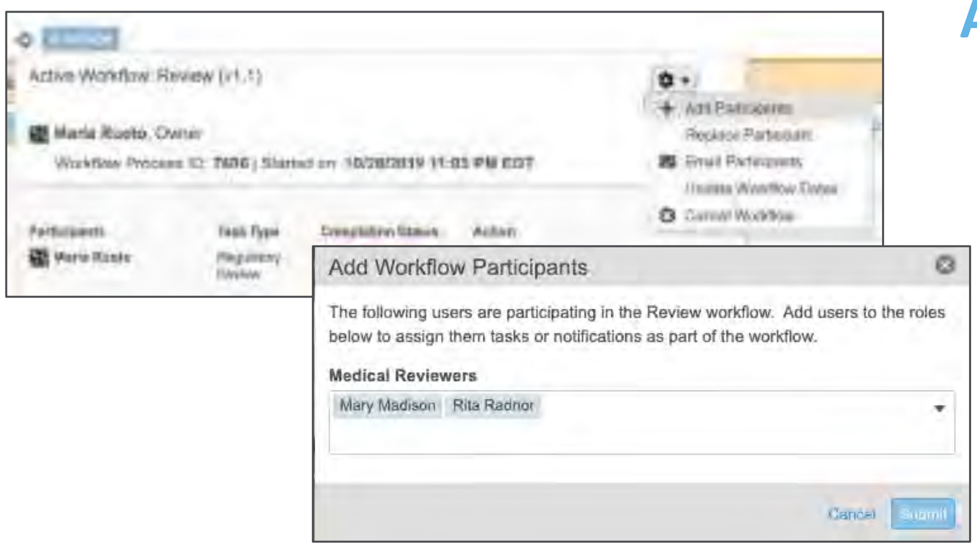
- Considerations
  - Admins must configure a Multi-Document Workflow for a specific lifecycle and set up a document lifecycle state user action to support the single document usage
  - Workflows within Document Lifecycles will NOT be deprecated
- Configuration
  - Admin > Configuration > Document Lifecycles > [Lifecycle] > [State] > User Actions



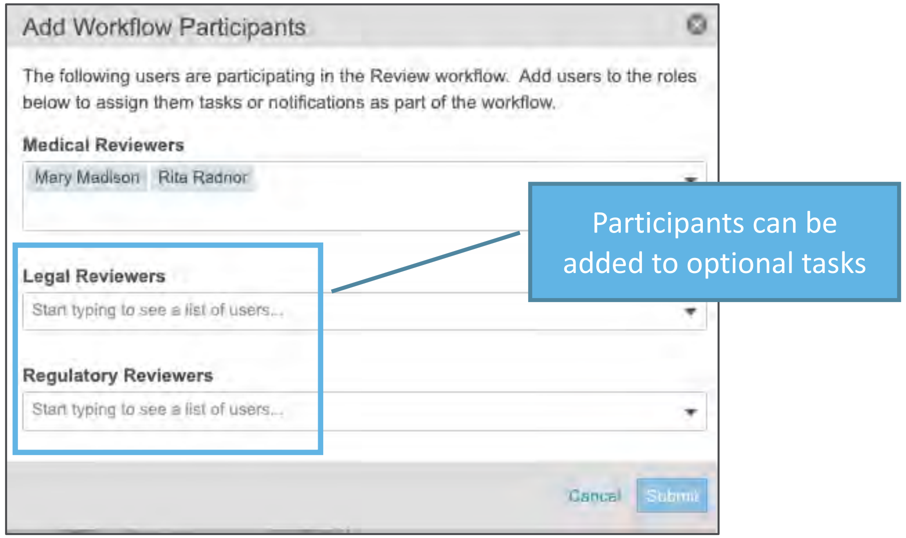
Add Participants to Unselected Optional Tasks

- Overview
  - Participants for optional tasks now appear in the Add Participants dialog window even if the associated optional task was not assigned when starting the workflow
  - Workflow initiators can now add participants for these optional tasks without having to start a new workflow

Before



After



- Impact
  - Workflow initiators can now add participants for optional tasks that were not originally assigned without having to start a new workflow

Add Participants to Unselected Optional Tasks

- Use Case
  - If the workflow initiator selects Medical and Regulatory reviewers at the start of a workflow, but later realizes that Legal also needs to be involved, they can use the Add Participant action to add Legal reviewers
- Considerations
  - You can add participants as long as the other parallel tasks have not yet been completed and the workflow has not proceeded beyond the tasks relevant to those participant groups
- Configuration
  - Contact Veeva Support

Admin Features

PromoMats Standard Metrics

- Overview
  - With this feature enabled, companies will be able to view and benchmark against key content and MLR process metrics in the new Standard Metrics metadata field

- Impact
  - Users will be able to view and report on valuable metrics such as Days to Enter Review, Days in Review, Number of Review Cycles, Days to Approval, and Content Creation Cost
  - Standard Metrics will ultimately provide a Life Sciences-specific data set to help answer common questions, such as:
    - What types of material have been developed and what is the approximate cost to create?
    - What is the average time content spends in review and in approval?

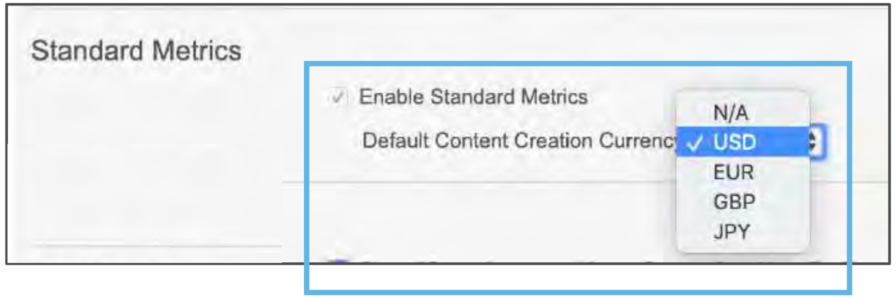
PromoMats Standard Metrics

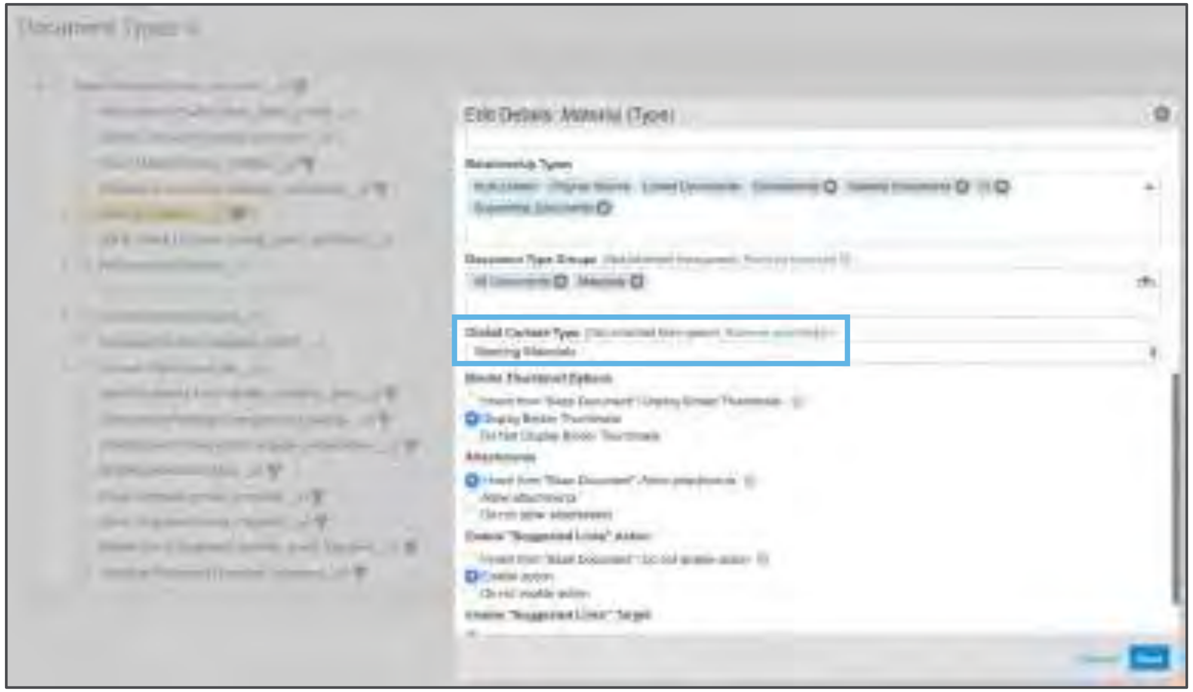
- Use Case
  - Compare content creation costs across agencies or global markets
- Considerations
  - Once Standard Metrics is enabled, it cannot be turned off
  - Standard Metrics only populate on documents created after enablement
  - Upon saving a new document:
    - Content Creation Currency will automatically populate, if a default is set
      - The Currency field is set to Decline to Provide by default for several document types regardless of the default currency you selected
    - Global Content Type will automatically populate, if mapped to a Document Type
      - The default Global Content Type will automatically populate for these standard document types
      - If you don’t select a default Global Content Type for a document sub-type, it will default to the Content Type selected for the parent document type
    - The default for either field will not overwrite manually entered values
  - Content Creation Cost dropdown values will update based on selected currency
  - Vault records a new set of performance metrics for each *Steady* state the document enters
  - You cannot edit, delete, or deactivate the fields in the Standard Metrics section

Performance metric fields will auto-populate

PromoMats Standard Metrics

- Configuration
  - Admin > Settings > Application Settings > Standard Metrics
  - Admin > Configuration > Document Types > Global Content Type





Objects

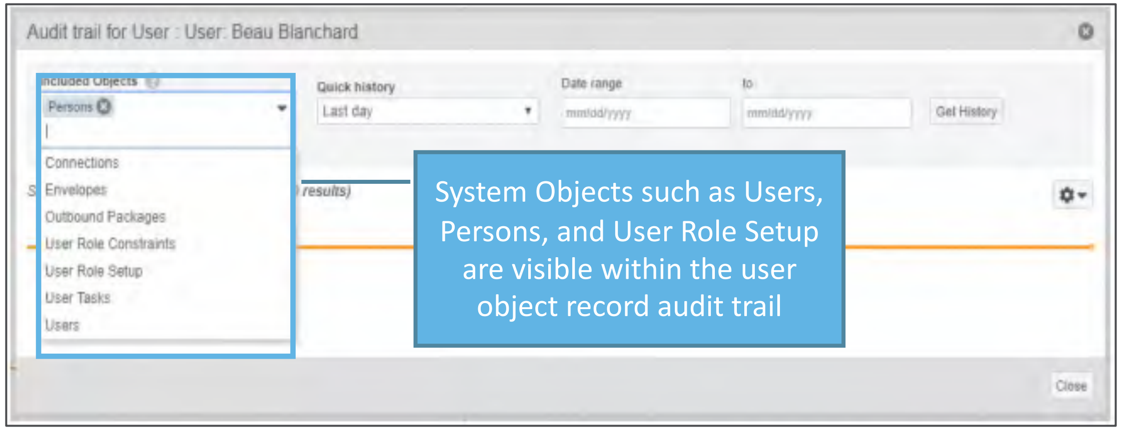
Uniqueness Update

- Overview
  - The object field option *Value Must Be Unique* controls whether a field must have a unique field value like *Name* or *External ID*
  - The toggle (On/Off) is no longer a synchronous operation

- Impact
  - The asynchronous update of this field option may result in delay before the change takes effect, specifically objects that have a lot of records
- Considerations
  - When the field option is toggled on or off, Vault will prevent certain actions on the affected field like deleting the field and modifying the maximum length setting

System Objects Supported in Related Record Audit Trails

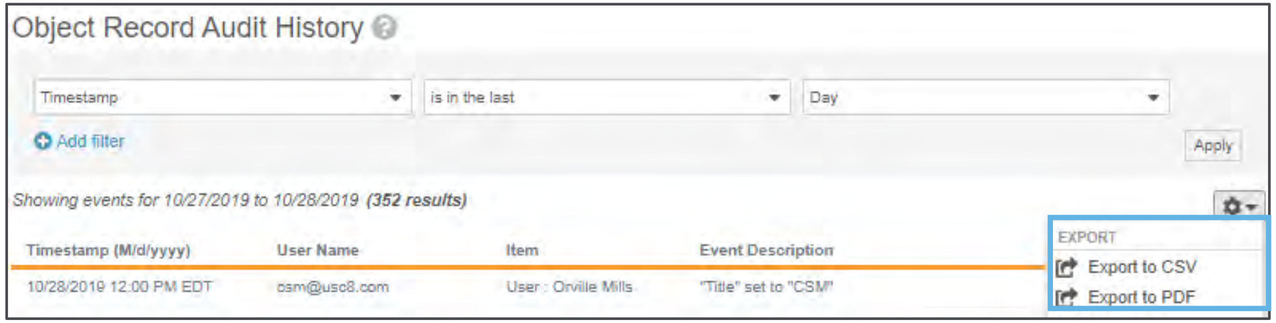
- Overview
  - Related object record audit entries are now supported to include system objects, such as User



- Impact
  - Provides an easier way to identify all related system activities related to that user
- Use Case
  - User role setup objects are used to setup Dynamic Access Control on Documents. Now you can query from a user all of the user role setup objects audit history. In the past you would have to go to the user role setup object to see its audit history
- Considerations
  - Created By and Last Modified By are not included due to not being true object references
  - Learn more about [Object Record Audit Trails]

Record ID & Object Label Column in Object Audit Exports

- Overview
  - A Record ID field and an Object Label field are now included within the object record audit exports



The Record ID column provides a way to uniquely identify the related record

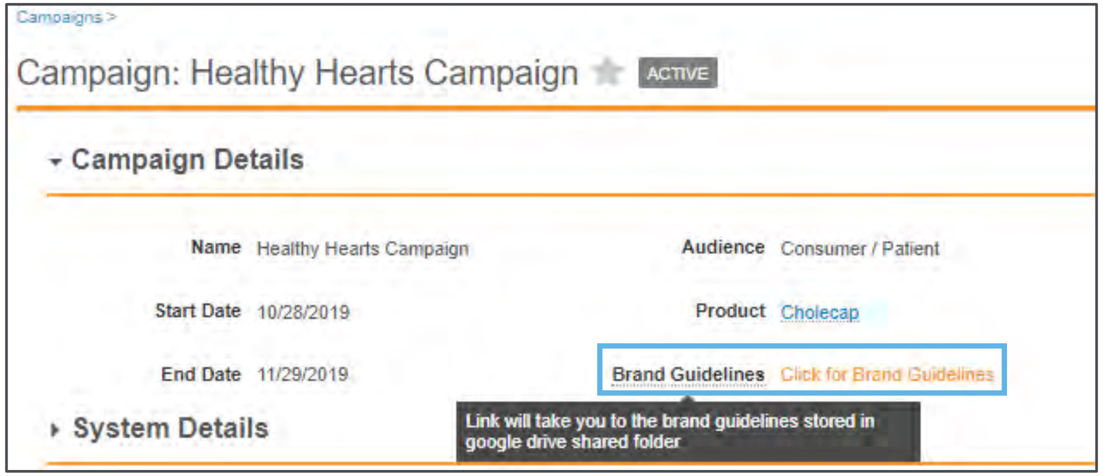
D	E	F	N	O	P
Item	Action	Field Name	Event Description	Record ID	Object Label
User : Orville Mills	Edit	Title	"Title" set to "CSM"	1513047	User
User : Orville Mills	Edit	Image	"Image" set to "Orville Mills 201	1513047	User
User : Orville Mills	Edit	Company	"Company" set to "Veeva Pharn	1513047	User
User : Alex Connor	Edit	First Name	"First Name" changed from "Ale	1219341	User
User : Alex Connor	Edit	Name	"Name" changed from "Alex Co	1219341	User

The Object Label column makes performing analysis easier for users, alleviating the need to parse this information from the Item column

- Impact
  - Ensuring consistency across the API and user interface audit exports
- Considerations
  - Learn more about Audit Trail Exports

Link Formula Fields

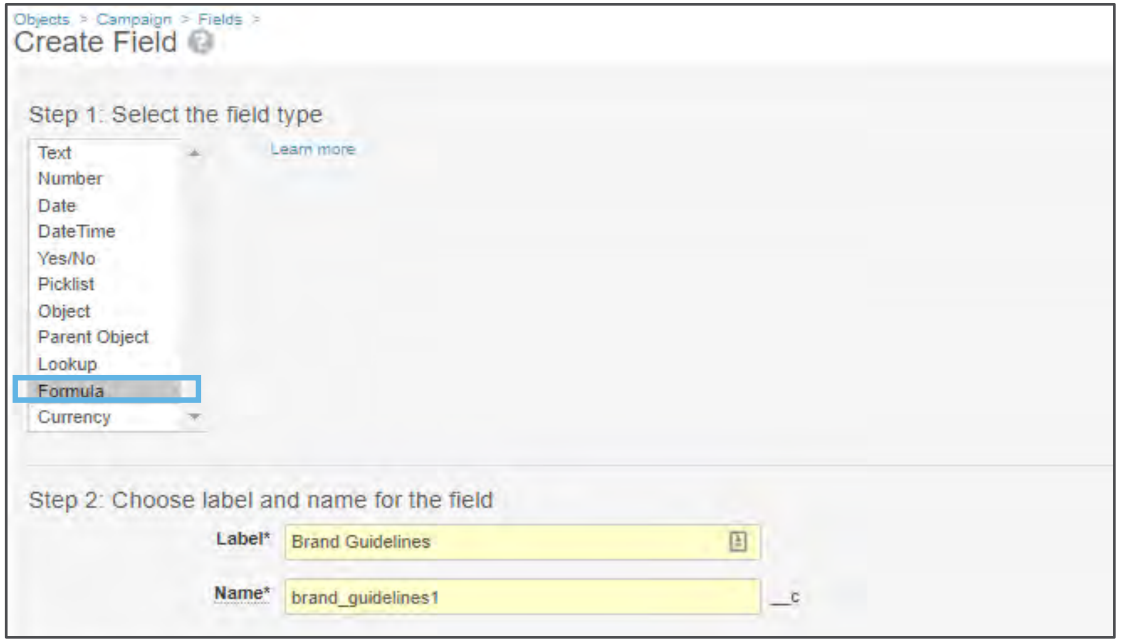
- Overview
  - Admins can now generate a clickable link on object records
- Impact
  - Allows users to navigate between objects in different Vaults when you have Vault to Vault integrations in place
  - Provides users with clickable links to external sites, easing navigation

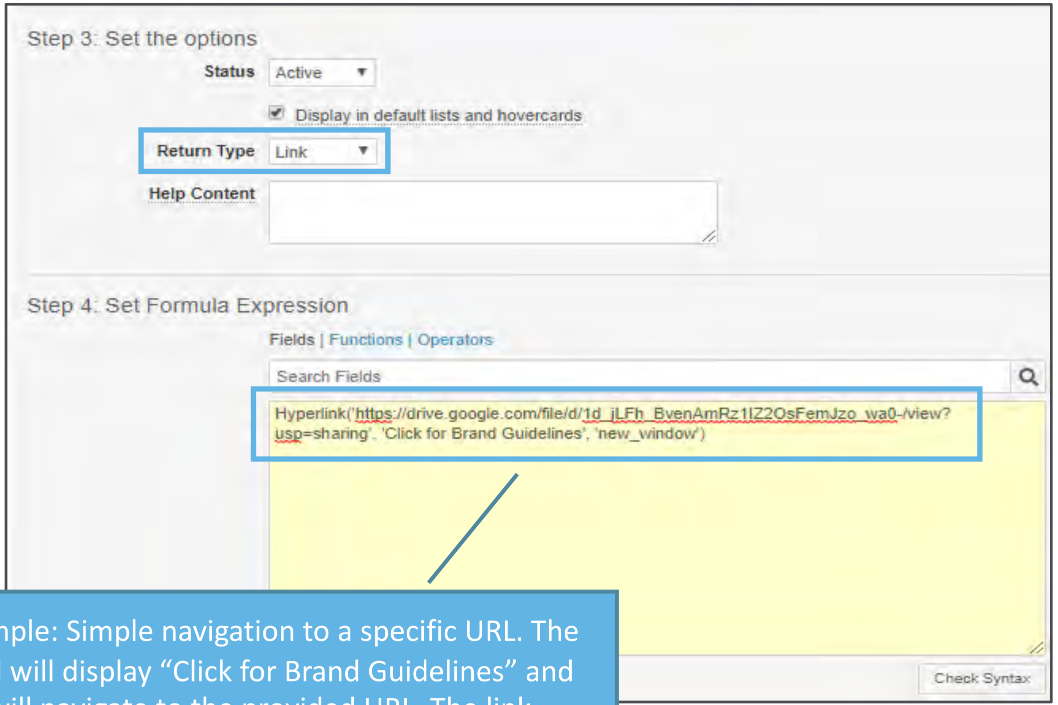


- Use Case
  - You can reference brand guidelines that are stored on external sites

Link Formula Fields

- Configuration
  - Admin > Configuration > Object > [Object] > Fields > Create Formula Link Return Type field
  - Learn more about [Using the *Hyperlink* Function]

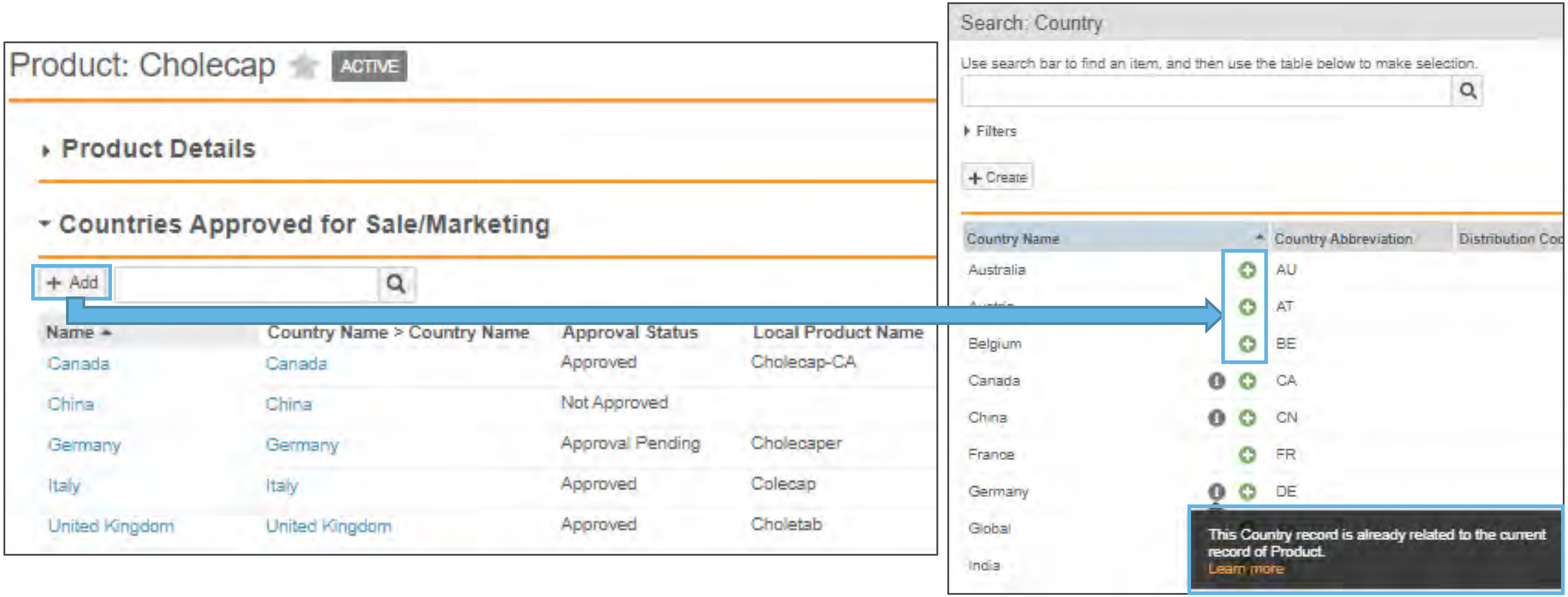




Example: Simple navigation to a specific URL. The field will display "Click for Brand Guidelines" and will navigate to the provided URL. The link destination will open in a new browser tab/window.

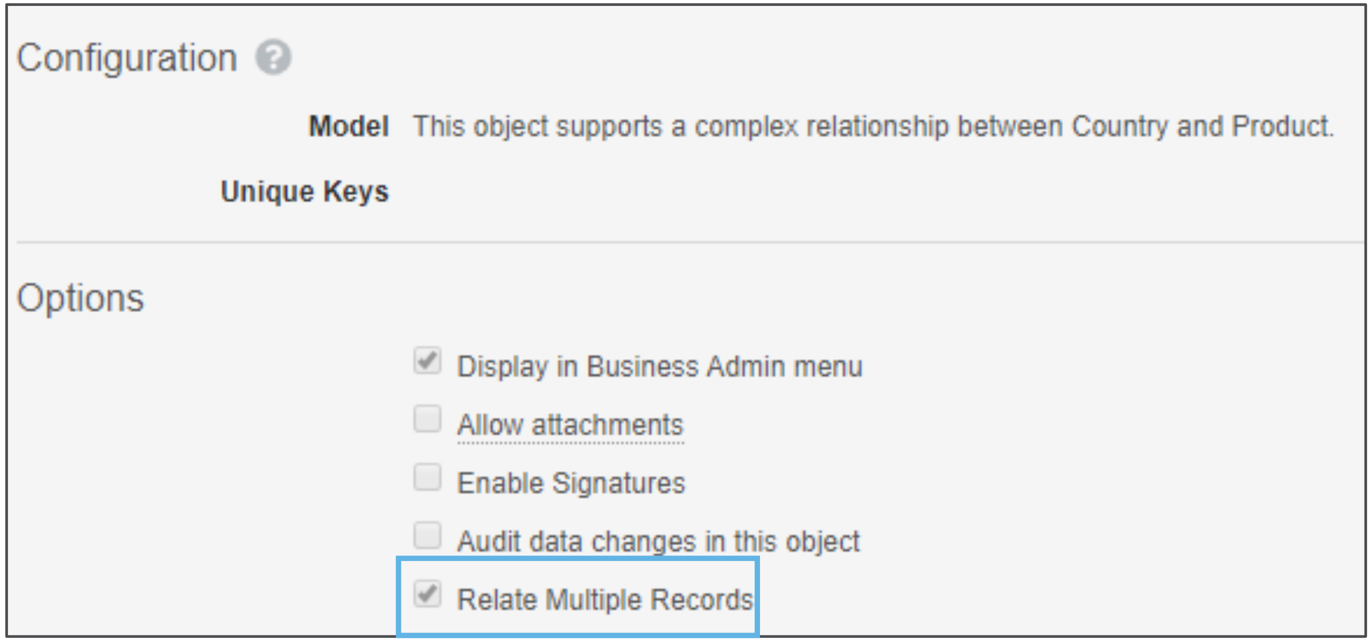
Related Multiple Records: Complex Join Related Sections

- Overview
  - Complex Join Object related sections support selecting multiple related records
  - Records that are already related are shown with an indicator but can be selected again



Related Multiple Records: Complex Join Related Sections

- Considerations
  - The page layout for each parent object must also include a *Related Object* section
  - Multi-select flag for complex join objects is default off
  - Error Message is thrown if some records can’t be related
- Configuration
  - Configuration > Objects > [Relational Object] > Details > Edit > Enable Relate Multiple Records
  - Learn more about [Object Relationships]



Resources

Post Go-live Support

CSM

Contact your CSM for any enquires

Managed Services

Contact for solution design, configuration requests and/or questions

Veeva & U

One stop hub for self help, key announcements and best practice guidance

Veeva Online Help

Release notes and Vault admin user help

Commercial & Medical Summit

Learn, network, & hear from industry experts

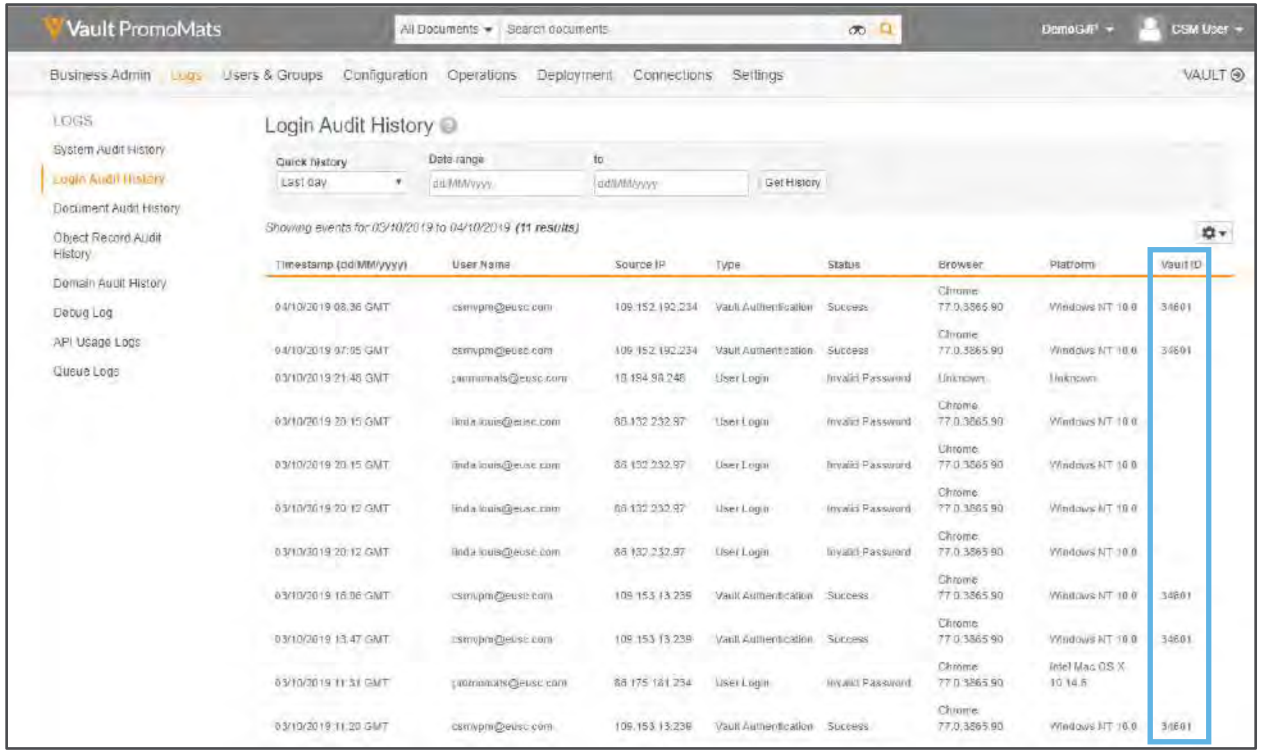
Opt-in via Vault User Profile to receive email notifications

Thank you

Appendix

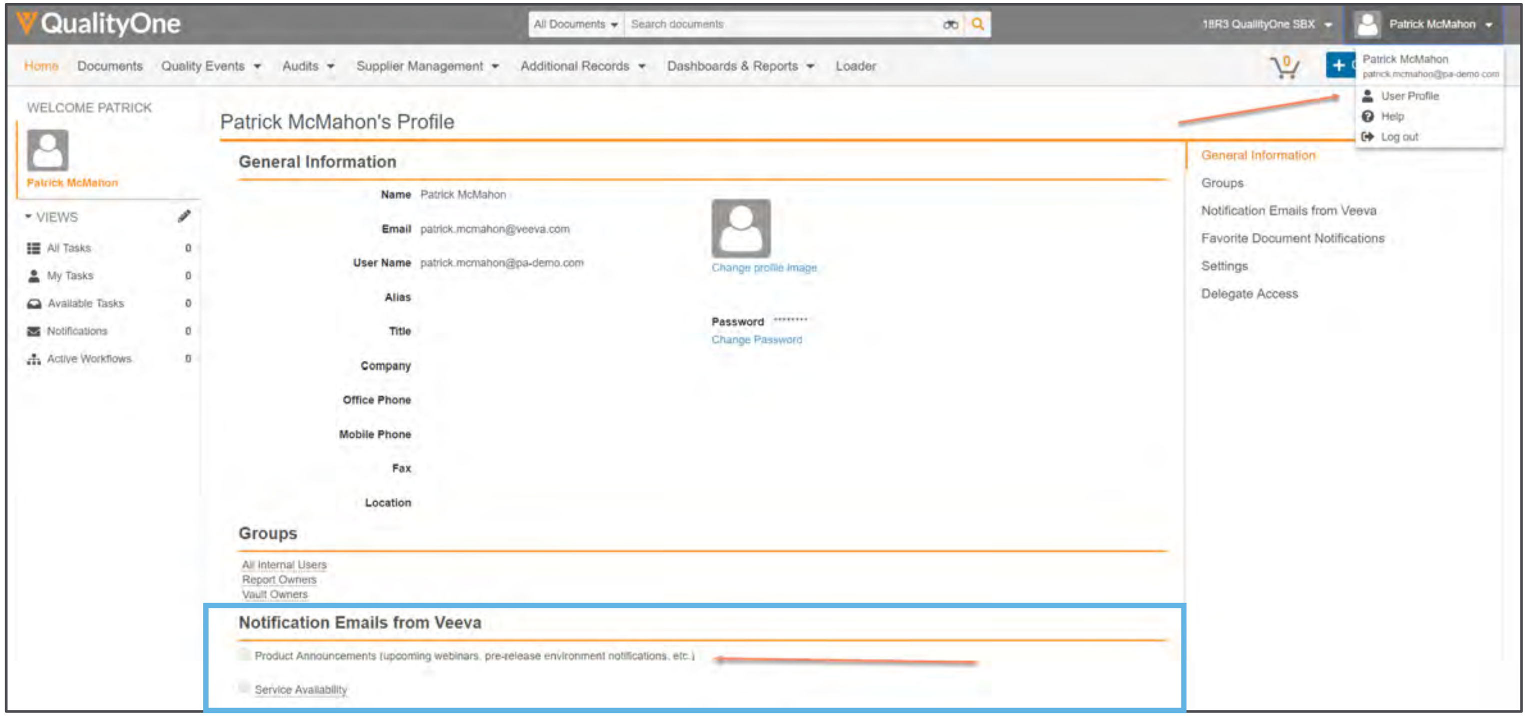
Add Vault ID to Login Audit History User Interface

- Overview
  - This feature exposes the Vault ID field in the Audit History
    - Previously you had to export the Login Audit History to access this information
- Impact
  - Admins can now quickly understand which Vault an Audit entry relates to
- Considerations
  - Login Audit History shows Vault-level authentication events each time a user accesses the current Vault
  - Admins can access the Login Audit History by going to Admin > Logs > Login Audit History to see Login Activity, including the new Vault ID field



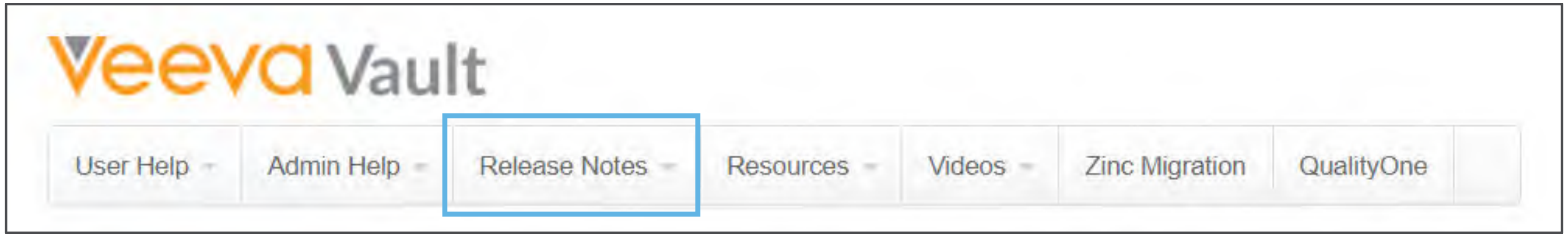
Release Notification

- Vault users opt in via their User Profile to receive email notifications about:
  - Upcoming General Releases
  - Invitations to General Release overview webinars
  - Pre-release & validation availability
  - Go-live date reminders
- Users that do not check the box will not be receive notifications



Release Notes

- Help Documentation
  - Release Notes
    - What’s New
    - Release Impact Assessment

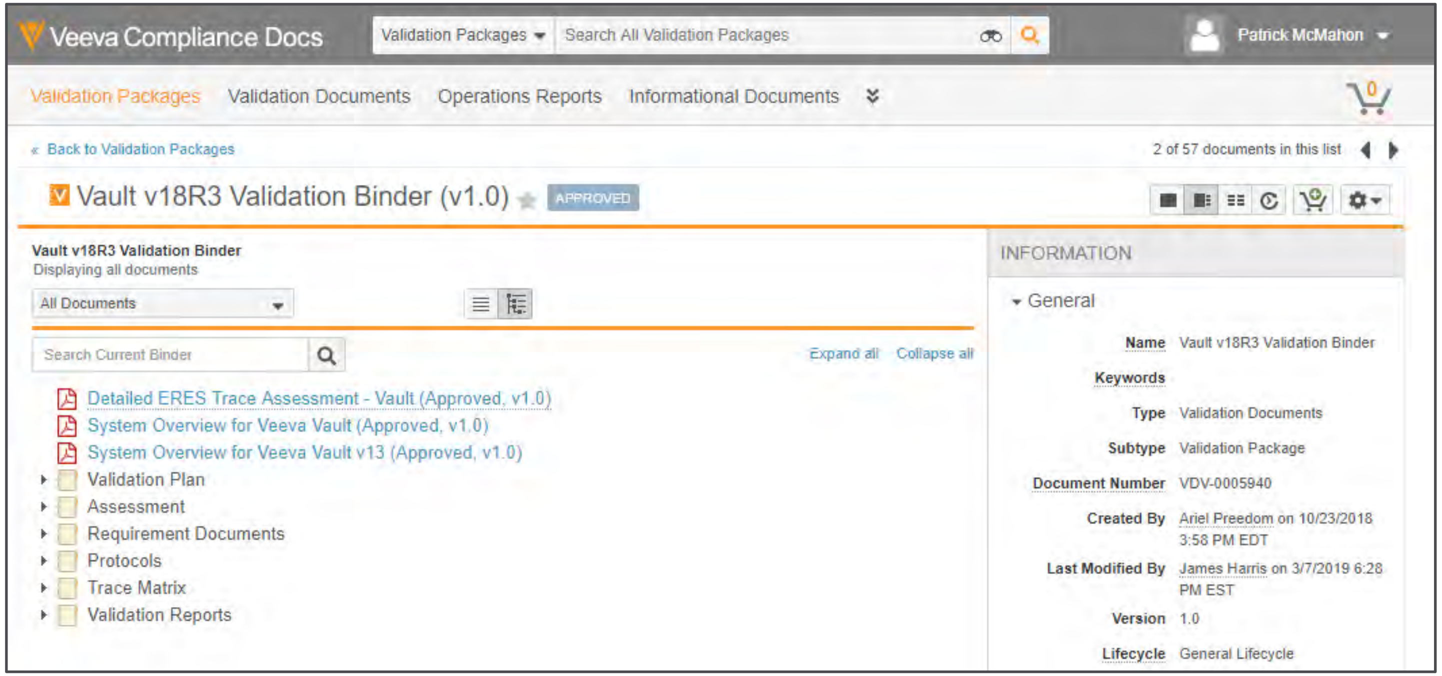


Pre-Release Vault

- Validation testing for new features can be performed in Pre-Release Vault
- Pre-Release environments are available for the 4 weeks before and 4 weeks after a General Release
  - Access to Pre-Release is limited to Vault Owners of Production Vaults (customers only) and Product Support by default
  - Access can be requested via a Support ticket (Zendesk) via the Customer Support Portal

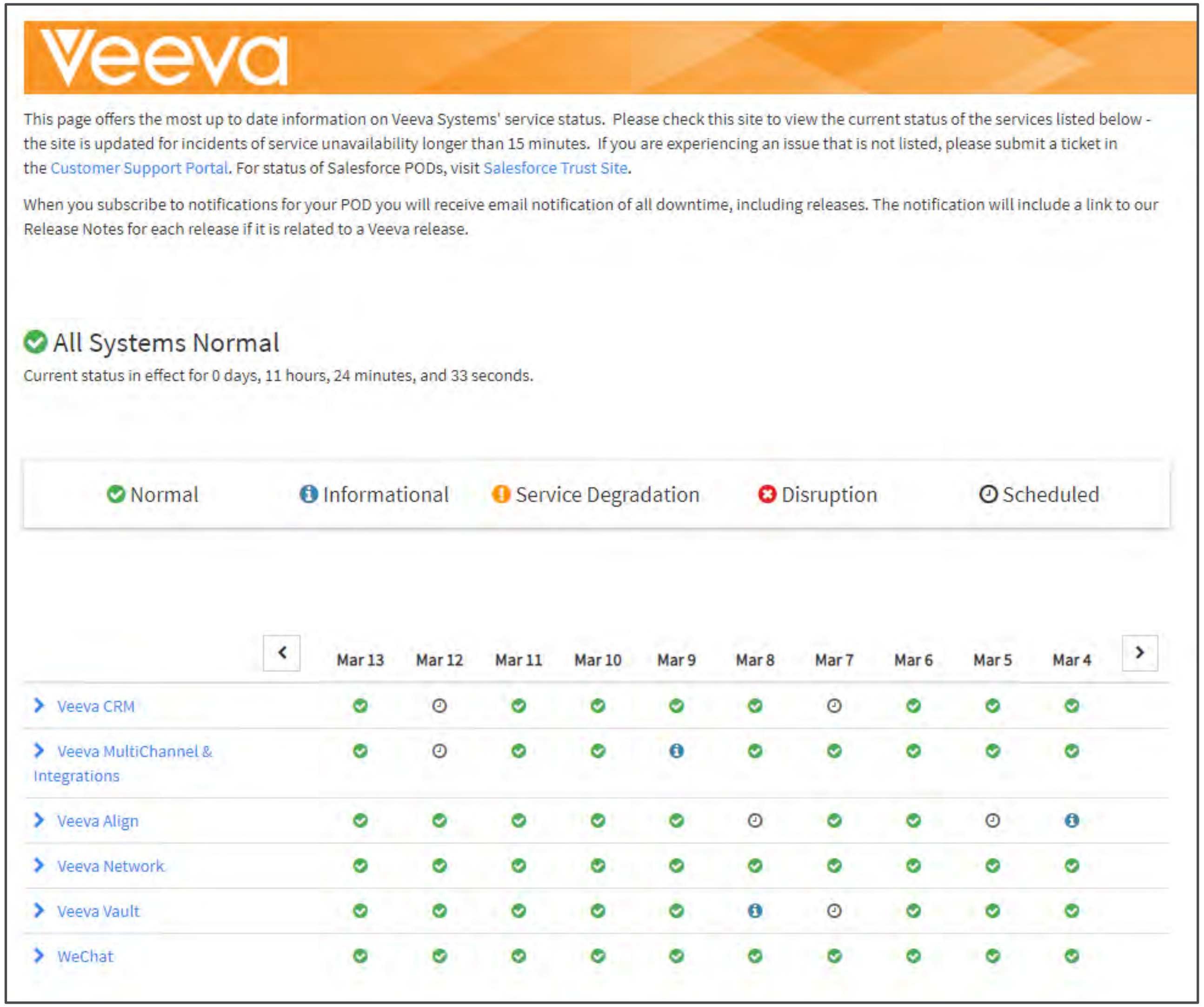
VeevaDocs

- Contains validation documentation for Veeva Products and Veeva Operational Reports
- Provided under MSA or NDA for internal use only
- Organized into Binders for each product and release
- Access can be requested via Support ticket (Zendesk) via Customer Support Portal



trust.veeva.com

- Offers up to date information on all of Veeva Systems' service status
- Communicates known issues, current status, and incidents of service unavailability
- Calendar of known maintenance windows and planned downtime
- Listed by Product & POD



Optimizations for Merge Fields

- Overview
  - The syntax for where clause has been changed to be simplified and you can use the familiar relationship structure
  - Merge fields functionality retrieves a maximum of 1,000 entries to improve the performance
- Impact
  - More flexibility is provided to the Merge Fields function in order to meet more complex business requirements and improve ease of use
- Use Case
  - You might want to leverage the merge fields function to display the list of Products that content will be used for and then filter on the active Products
- Considerations
  - When using the where clause, you cannot filter on the root object
  - You can only filter on objects with outbound relationships
  - Documents using the previous formula structure (without __vr) are still supported

Optimizations for Merge Fields

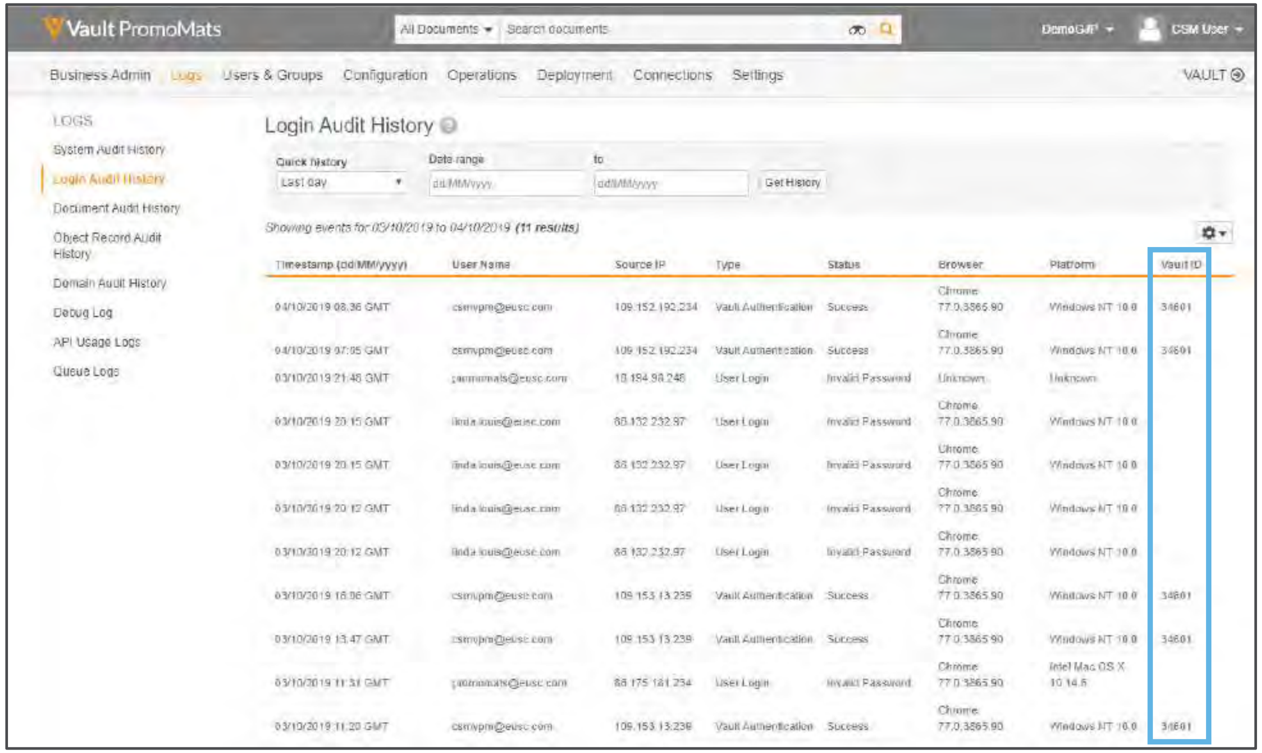
- Configuration
  - On the document (Word) the following syntax has to be used: ${Vault:document_relationshipname__vr.relationshipname__vr.fieldname__v;WHERE VQL_Expression]

Example: ${Vault:document_application2__cr.therapeutic_area__cr.name__v;WHERE therapeutic_area__cr.status__v = 'Active'}

Token	Related Vault Field
Merge Fields	Document Name
VV-00049	Document Number
Draft	Document Status
10/31/2019 10:48 AM PDT	Document Last Modified
Claims Document	Document Type
	Document Subtype
	Document Classification
Cholecap	Product
United States	Country
US	Country Abbreviation (Object)
Hyperlipidemia	List of therapeutic areas related to the application, with a status of 'Active'

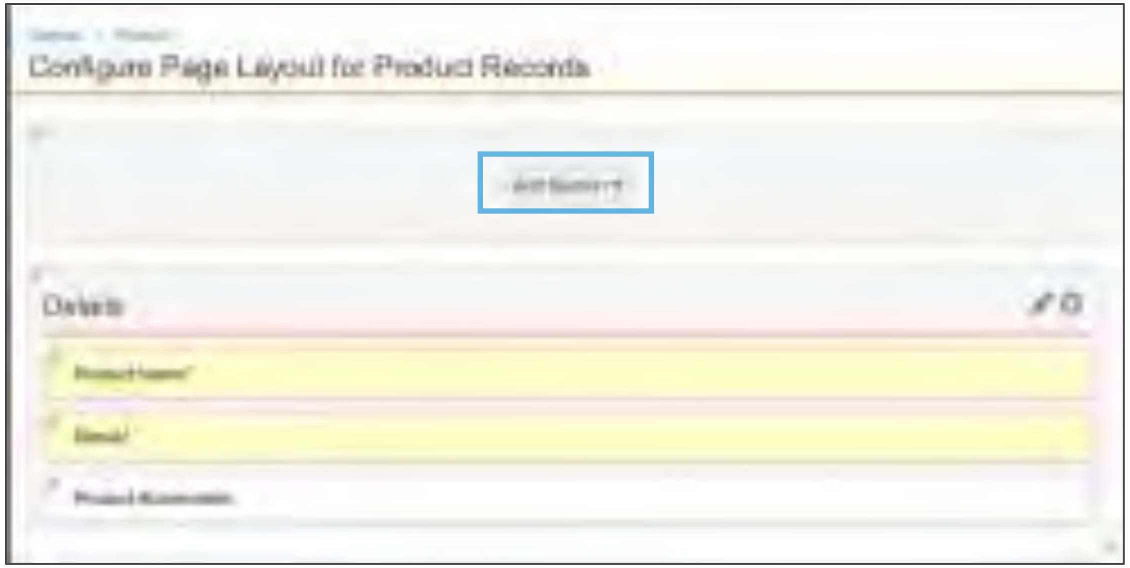
Add Vault ID to Login Audit History User Interface

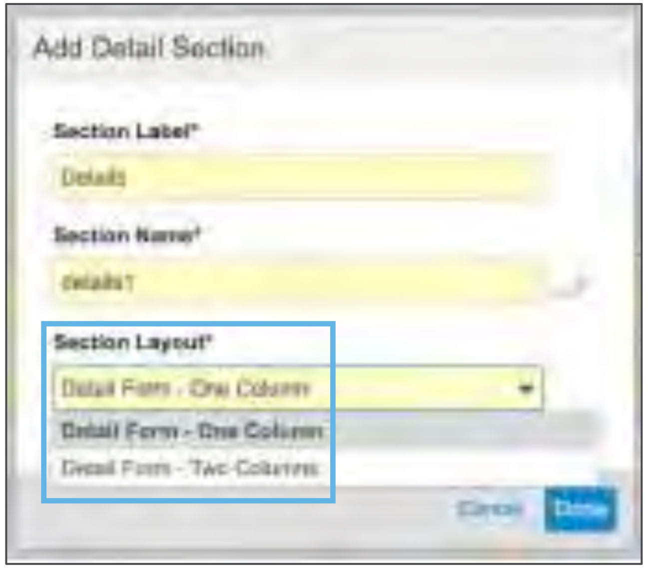
- Overview
  - This feature exposes the Vault ID field in the Audit History
    - Previously you had to export the Login Audit History to access this information
- Impact
  - Admins can now quickly understand which Vault an Audit entry relates to
- Considerations
  - Login Audit History shows Vault-level authentication events each time a user accesses the current Vault
  - Admins can access the Login Audit History by going to Admin > Logs > Login Audit History to see Login Activity, including the new Vault ID field



UI Changes in Object Page Layout Editor

- Overview
  - When editing an object page layout, Admins will see the following changes:
    - The Create Section button is now labeled ‘Add Section’
    - Two options under Add Section (Single Column Detail Form and Two Column Detail Form) have been consolidated into a single item (Detail Form)
    - When Admins select Add Section > Detail Form, the dialog includes a Section Layout field where they can choose to create a section with one or two columns
- Considerations
  - This feature is not visible in pre-release Vaults but will be Auto-On in the General Release





UI Changes in Object Page Layout Editor

- Overview
  - This feature adds seconds to audit entry Timestamp columns, which are available when exporting from an individual audit trail or Admin > Logs
- Impact
  - This feature makes audit exports from the user interface consistent with audit exports from the API, which already included seconds

A2 fx 04/11/2019 13:55:09 EST

	A	B	C	D	E	F	G
1	**Timestamp (dd/MM/yyyy)**	**User Name**	**Full Name**	**Version**	**Action**	**Item**	**Field Name**
2	04/11/2019 13:55:09 EST	Kerry.Reese@vv-csm.com	Kerry Reese	1	GetDocumentVersion	ET-0001	
3	04/11/2019 13:08:59 EST	andrea.moy@vv-csm.com	Andrea Guglielmino	1	GetDocumentVersion	VV-00354	
4	04/11/2019 10:24:23 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0001	Veeva HTML
5	04/11/2019 10:24:23 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0004	Veeva HTML
6	04/11/2019 10:24:23 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0004	Veeva HTML
7	04/11/2019 10:24:23 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0004	Veeva HTML
8	04/11/2019 10:24:23 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0005	Veeva HTML
9	04/11/2019 10:24:22 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0001	Veeva HTML
10	04/11/2019 10:24:22 EST	maria.ruoto@vv-csm.com	Maria Ruoto	1	DownloadRendition	TF-0001	Veeva HTML
11	04/11/2019 00:00:16 EST	Sandra.schmitt@vv-csm.com	Sandra Schmitt	1	DownloadRendition	TF-0001	Veeva HTML
12	04/11/2019 00:00:15 EST	Sandra.schmitt@vv-csm.com	Sandra Schmitt	1	DownloadRendition	TF-0004	Veeva HTML
13	04/11/2019 00:00:15 EST	Sandra.schmitt@vv-csm.com	Sandra Schmitt	1	DownloadRendition	TF-0004	Veeva HTML
14	04/11/2019 00:00:15 EST	Sandra.schmitt@vv-csm.com	Sandra Schmitt	1	DownloadRendition	TF-0004	Veeva HTML

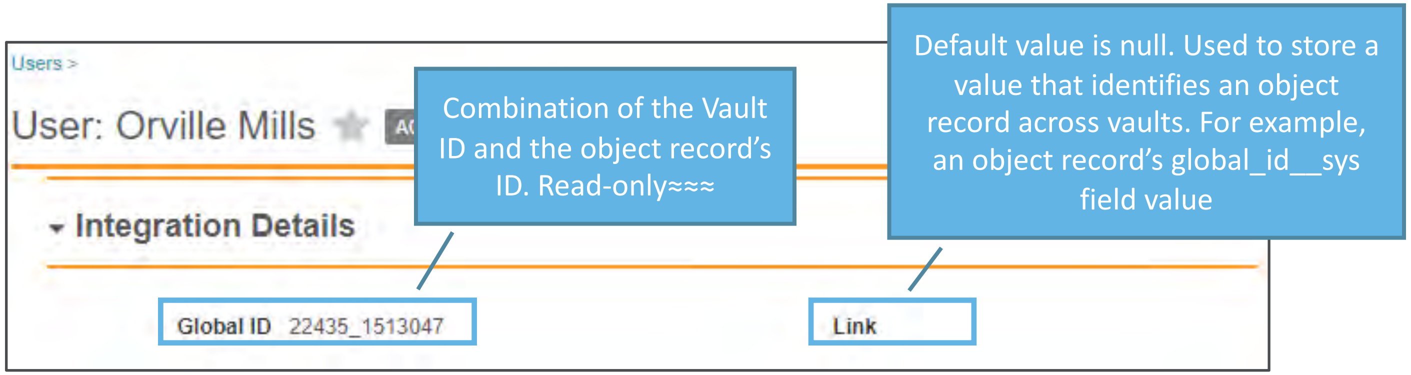
Seconds now display in exported audit trails

Limited Release Sandbox

- Overview
  - Customers will now be able to create a Limited Release Sandbox from a General Release Vault
- Impact
  - Allows customers to manage their own Limited Release sandbox and more proactively assess new functionality ahead of each General Release
- Considerations
  - Allowed number of sandboxes for each customer will remain the same
    - Customers are entitled to three (3) configuration Sandbox Vaults
  - Configuration Migration from a Limited Release Vault to a General Release Vault will not work
  - Limited Release features may change before the General Release
  - Support when working in a Limited Release Sandbox will be limited

Global ID & Link Fields for Object Records

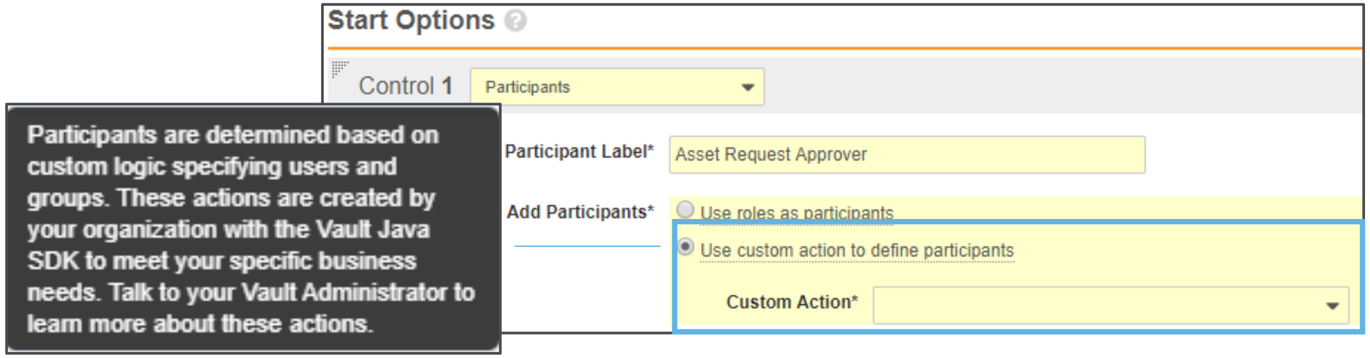
- Overview
  - Users can now reference every object record by a Global ID, which is unique across all Vaults, through a new Link text field

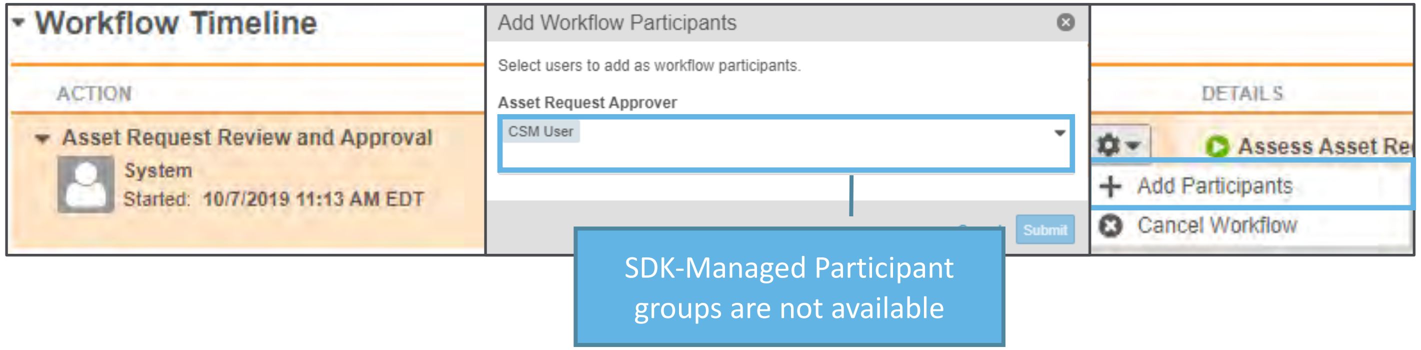


- Impact
  - The Global ID helps identify the exact record in integrations between Vaults or with other external systems while the Link field can be used to reference Vault Global Record IDs or external system IDs to connect them in integrations
- Considerations
  - These fields will be added to every Object
    - While the global ID is non-editable, Admins can control the Link field's edit permission like existing text fields
  - Global ID will be updated on existing records when the record is updated
    - Alternatively, Admins can request Veeva Support to run an action to populate Global ID values in an existing Object in Vault
  - Learn more about Global ID & Link Fields for Object Records

Restrict Adding Users to Active Workflows with SDK-Managed Participants

- Overview
  - When object workflow participants are defined using Vault Java SDK custom actions, the participant group is no longer available in the Add Participants dialog

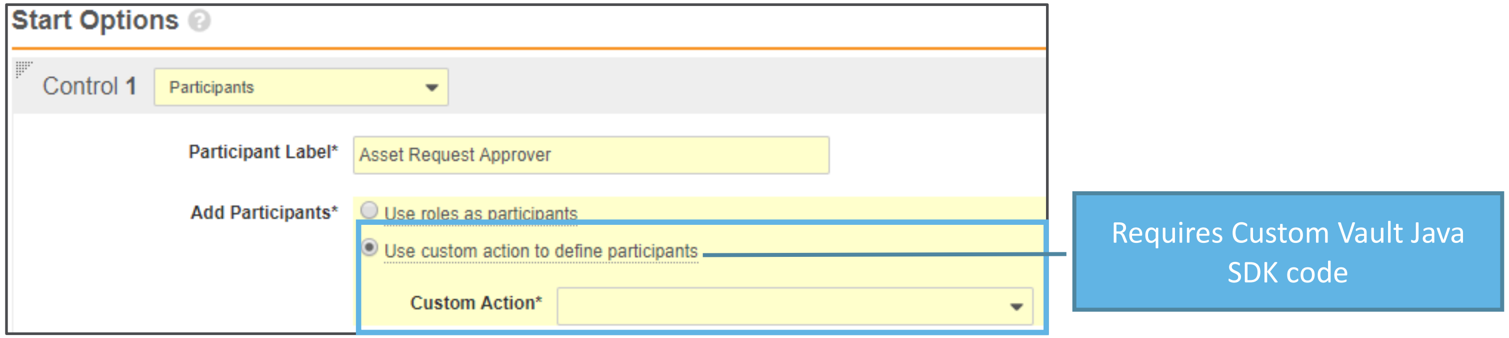




- Impact
  - This restriction prevents users from manually changing the membership for participant groups defined by custom Vault Java SDK code

Restrict Adding Users to Active Workflows with SDK-Managed Participants

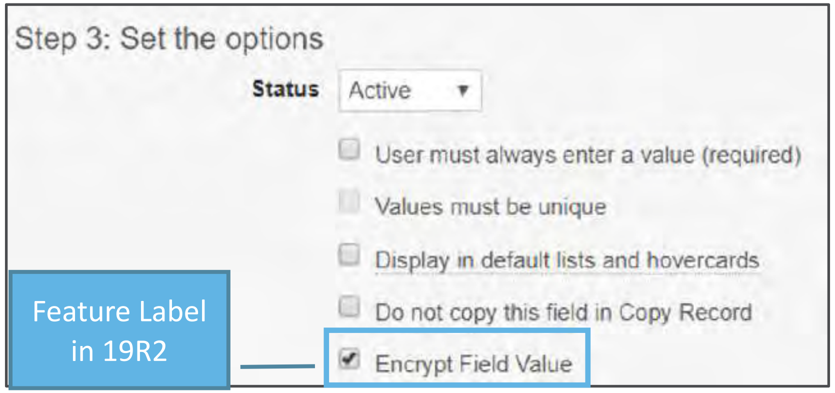
- Considerations
  - Auto-On in vaults where there's a configured workflow using the Record Workflow Action with SDK Managed Participant
- Configuration
  - Configuration > Object Workflows > [Workflow] > Start Workflow step > Start Options

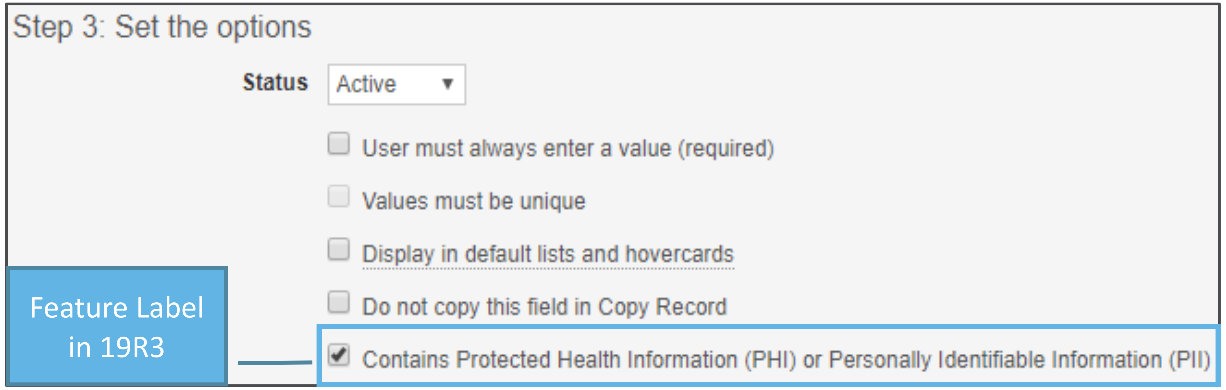


  - Learn more about [Managing Vault Java SDK Solutions]()

Update Label to PHI or PII Field

- Overview
  - The Encrypt Field Value setting on object fields is relabeled to Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)





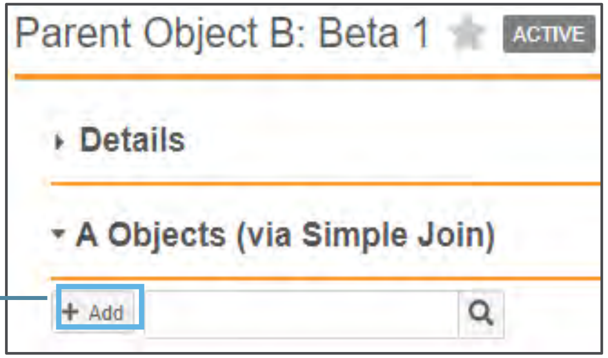
- Impact
  - All data in Vault at rest is always encrypted, this label change better reflects the intended usage of the setting
- Configuration
  - Admin > Configuration > Objects >[Object] > Fields > [field]
  - Enable Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)

Simple Join Objects Include Lifecycle State Fields

- Overview
  - As of 19R3 the Lifecycle and Lifecycle State fields have been included as part of the simple join umbrella
  - Before 19R3, adding a Lifecycle to a Simple join object would convert the join object into a Complex join object which used to change the related object section's +Add button to a +Create button

Before 19R3, a Simple Join with a Lifecycle be came a Complex Join. A Complex Join Related Object Sections shows a + Create button by default

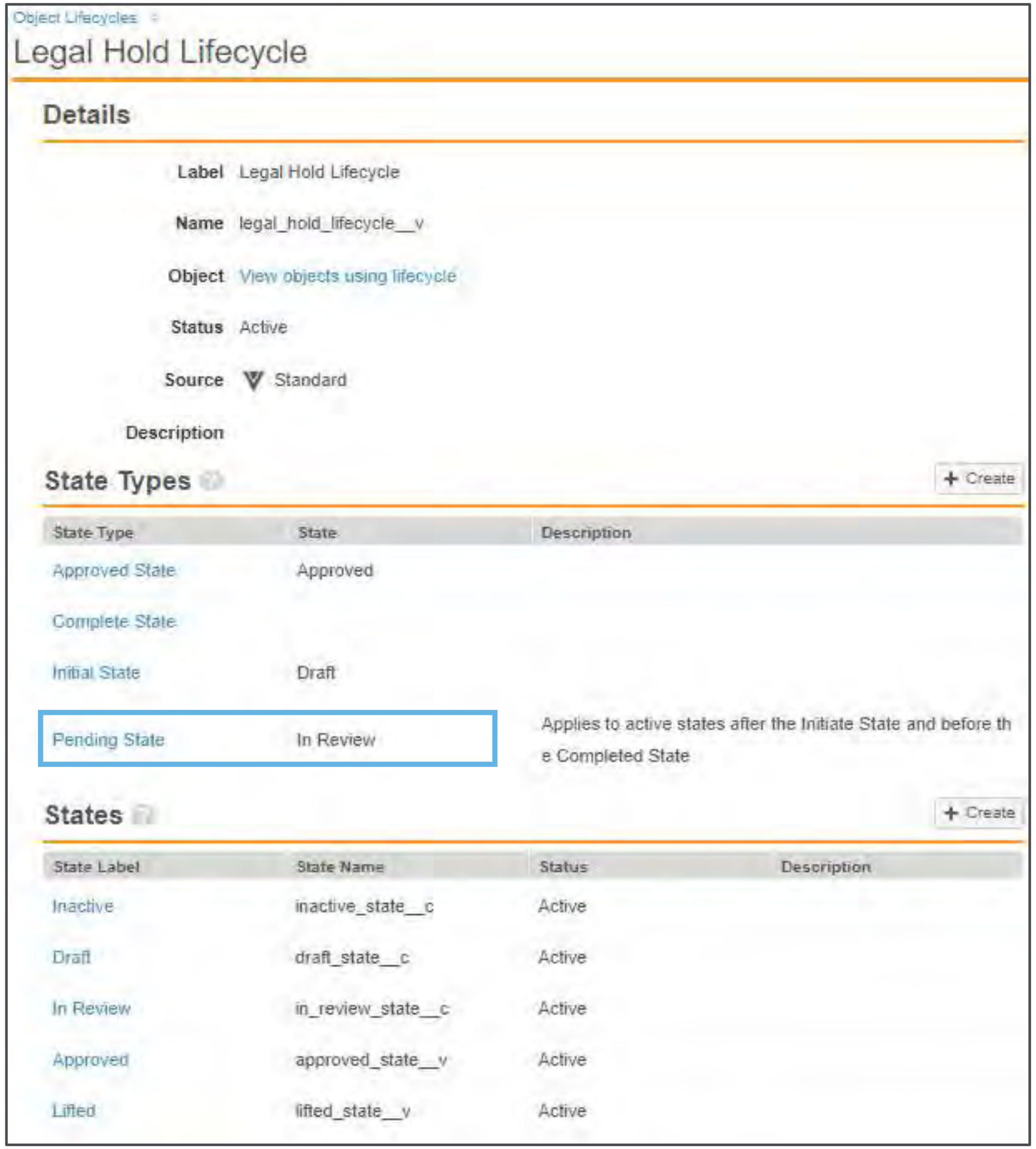
As of 19R3, a Simple Join Related Object Sections will show a + Add button, even when the Simple Join has a Lifecycle



- Impact
  - This enhancement allows simple join objects with an assigned Lifecycle to maintain the multi-select (+ADD) behavior within the related object section
- Considerations
  - Learn more about [Configuring Object Lifecycles]

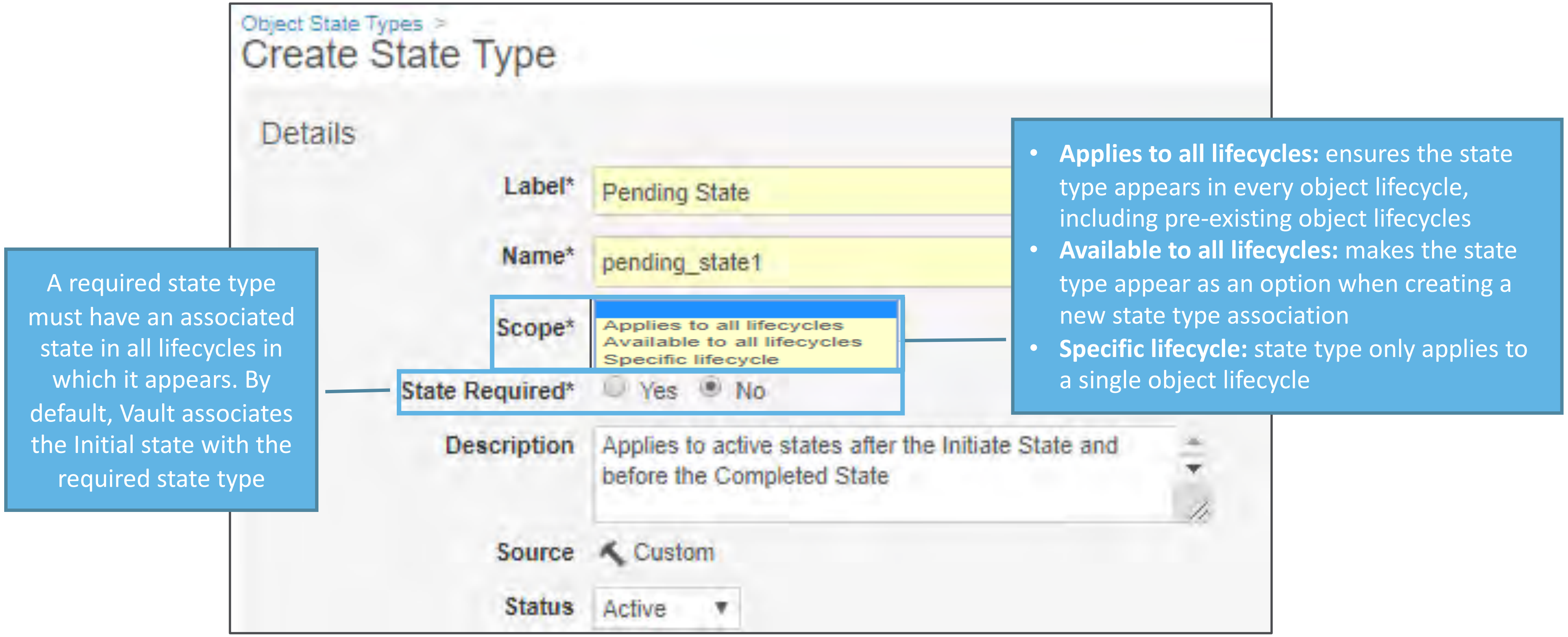
Object State Types

- Overview
  - Prior to 19R3, only *Initial* and *Complete* were available static state types within object lifecycles
  - This feature allows Admins to create or modify custom object state types and associate them to available object lifecycles
- Impact
  - Vault functionality, such as notifications, distribution of data, and reporting can leverage the custom object state type
- Consideration
  - Vault Compare and Vault Configuration Reports may show state type lifecycle components have changed even though there is no functional difference
  - Learn more about [managing object state types]



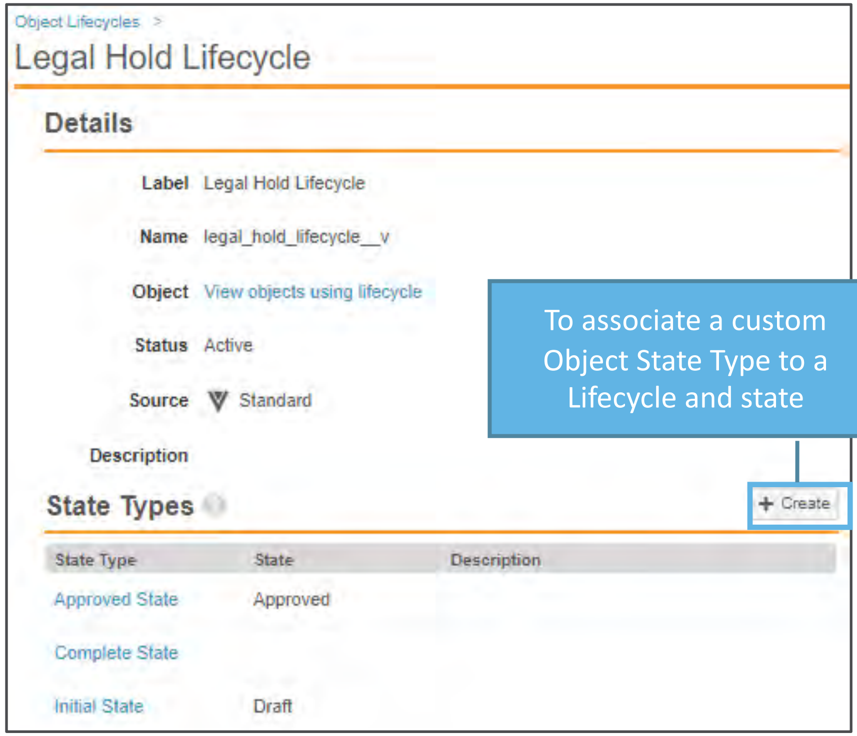
Object State Types

- Configuration
  - Create Object State Type
    - Admin > Configuration > Object State Types > Create Object State Type

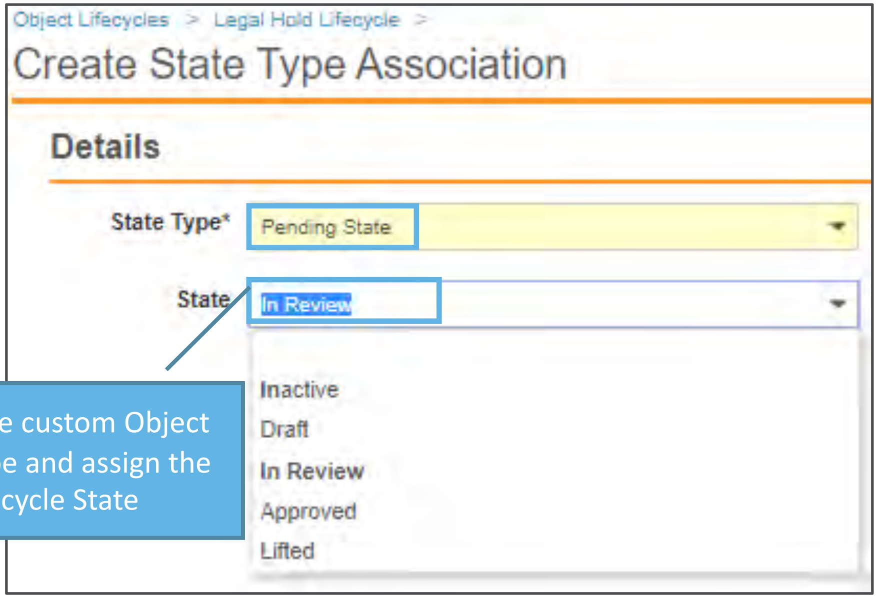


Object State Types

- Configuration continued
  - Associate Object State Type to Object Lifecycle and State
    - Admin > Configuration > Object Lifecycles > [Lifecycle] > Create State Types



To associate a custom Object State Type to a Lifecycle and state



Select the custom Object State Type and assign the Lifecycle State

Increase Formula Field Limit for Objects

- Overview
  - You can now have up to 10 formula fields on each object
- Impact
  - Extends the number of formula fields from 5 to 10 per object allowing for greater use of formula fields
- Use Case
  - Formula fields can be used for text, date, Yes/No, number, icon, links.
  - The formula below adds a date seven (7) days from the *Current Due Date* field value
    - current_due_date__c + Days(7)
- Consideration
  - Formula field values are never editable; they simply display the calculated value
  - Learn more about configuring formula fields on objects

Global ID & Link Fields for Documents/Versions

- Overview
  - Users can now reference every document and every document version by a Global ID, which is unique across all Vaults, through new Link and Version Link text fields
- Impact
  - The Global ID helps identify the exact document or document version in integrations between Vaults or with other external systems while the Link and Version Link fields can be used to reference Vault global record IDs or external system IDs to connect them in integrations
- Considerations
  - We are adding both of these fields to every object. While the global ID is non-editable, Admins can control the Link field's edit permission like existing text fields
  - The Global ID fields cannot be used as merge field tokens
  - Does not update the last modified field on documents

Global ID	34820_858
Global Version ID	34820_858_1156
Document Link	
Document Version Link	

Default value is null. Used to store a value that identifies a document's content. For example, the document's global_id__sys field value

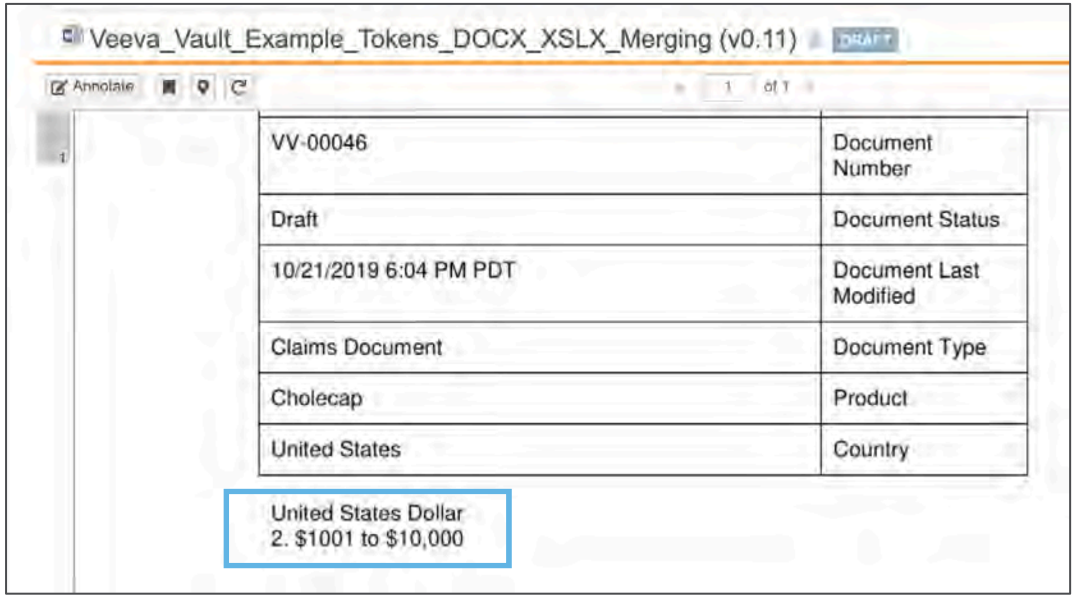
Default value is null. Used to store a value that identifies a document version's content. For example, the document version's global_version_id__sys field value

Disable Enhanced Checkout for All Vaults

- Overview
  - The Enhanced Checkout Java Applet has been completely disabled
- Impact
  - The ability to enable Enhanced Checkout in Vault Admin has been disabled
  - Users can no longer use the Enhanced Checkout Java Applet
- Considerations
  - We recommend uninstalling the Java Applet from your machine
  - Available Alternatives
    - Vault File Manager: Provides an efficient way to check out, edit, and check in Vault documents (Windows only)
      - When users check out documents, Vault File Manager automatically downloads them and users can open files to edit them directly from the Vault File Manager client installed on their computer
      - See Vault File Manager FAQ for more information
    - Collaborative Authoring with Microsoft Office: Collaborative Authoring with Microsoft Office allows multiple users to edit an Office document at the same time using the Office desktop software, Office Online, or the Office mobile apps
    - Checkout to Office Online: Available to Office 365 subscribers (Mac and Windows)
      - Allows users to check out and edit documents in Office Online applications
    - Basic Checkout: Vault relies on your browser to handle the download and upload (Mac and Windows)
      - You need to specify where to download the file upon checkout and manually locate the file for check in

Correct Currency Format in Merge Fields & Formatted Output

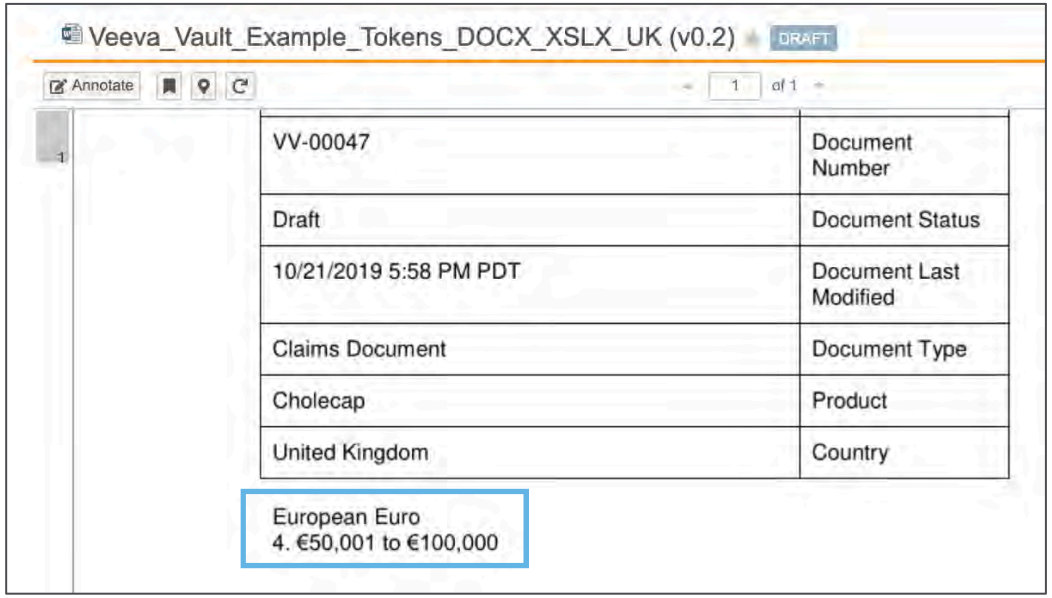
- Overview
  - Vault now displays currency values in merge fields and formatted output documents, using the format specified by the selected local currency
- Impact
  - Ensures currency values display with the correct formatting



Veeva_Vault_Example_Tokens_DOCX_XSLX_Merging (v0.11) DRAFT

VV-00046	Document Number
Draft	Document Status
10/21/2019 6:04 PM PDT	Document Last Modified
Claims Document	Document Type
Cholecap	Product
United States	Country

United States Dollar
2. $1001 to $10,000



Veeva_Vault_Example_Tokens_DOCX_XSLX_UK (v0.2) DRAFT

VV-00047	Document Number
Draft	Document Status
10/21/2019 5:58 PM PDT	Document Last Modified
Claims Document	Document Type
Cholecap	Product
United Kingdom	Country

European Euro
4. €50,001 to €100,000

API Logs to Include Request Duration

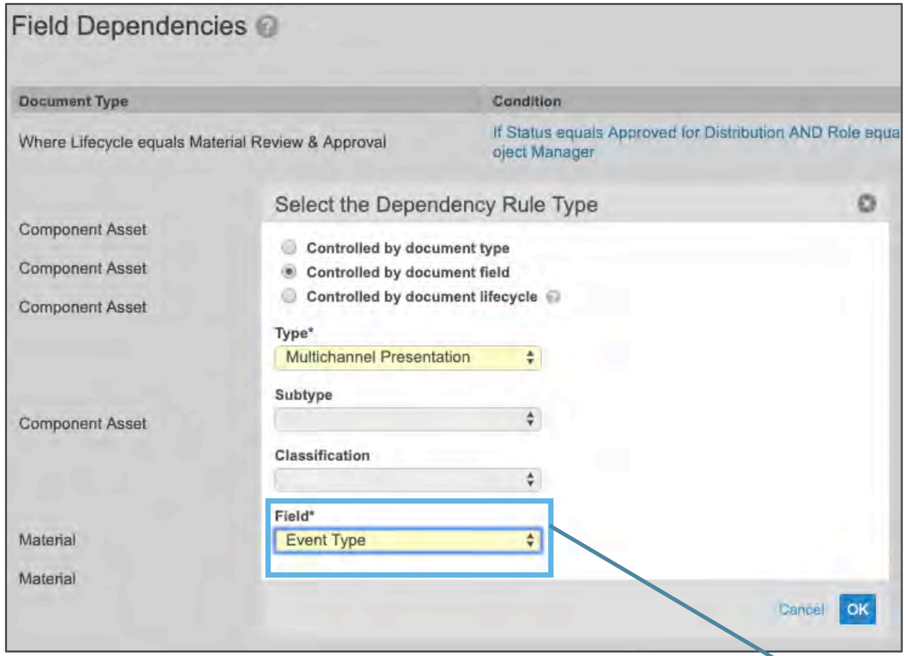
- Overview
  - This feature adds a Duration column to the API Usage Logs
- Impact
  - You can see how long an API call takes to process in Vault
- Use Case
  - Medical Inquiry Self Service HCP Portals use API calls to query real time information, allowing customers to monitor how long these calls take to execute in Vault
- Considerations
  - The time it takes an API request to execute is measured in milliseconds
  - The duration does not include transport times between Vault and the client

Download List of Unrelated Parent Records

- Overview
  - From simple join Related Object sections, users can now click a link to download a CSV file containing a list of parent records that Vault could not relate to the current record
- Impact
  - Prior to 19R3, if records were not related successfully, it used to fail silently
  - This feature will allow users to see a list of records that could not be related with the reason of the failure

Allow Field Dependencies for the Multichannel Event Type Field

- Overview
  - Event Type field (*crm_event_type__v*) is now available as a field dependency option for Multichannel Event Types
- Impact
  - The Event Type field will now make it easier for creators of multichannel content to select the correct values from long picklists more quickly
- Use Case
  - Users can now select Event Type as a Multichannel dependency option making picklist values more accurate



Availability of new Event Type

Self-Serve Pre-Release Vaults

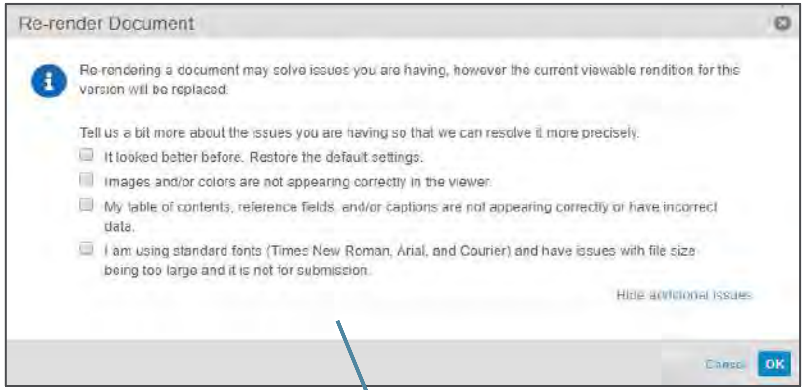
- Overview
  - In past releases, Veeva has cloned customer Production Vault configurations to create a Pre-Release Vault with each release
  - Starting in 20R1, customers will be able to create, refresh, and manage their Pre-Release Vaults within the Pre-Release window for each release
- Impact
  - This change gives customers greater control over their Pre-Release environments
- Use Case
  - This enhancement will be particularly helpful when a refresh is needed, or a Pre-Release needs to be created from a Sandbox (when Production is not yet provisioned)
- Considerations
  - The ability to leverage this new functionality will be available during the 20R1 pre-release period
  - Each customer is entitled to 1 Pre-Release Vault for every Production Vault
    - If no Production exists, the entitlement will be 1 for each Sandbox Vault whose Vault ID is the same as the parent Vault ID

Update EDL Item Tracking Fields When Batch Update Is No/Blank

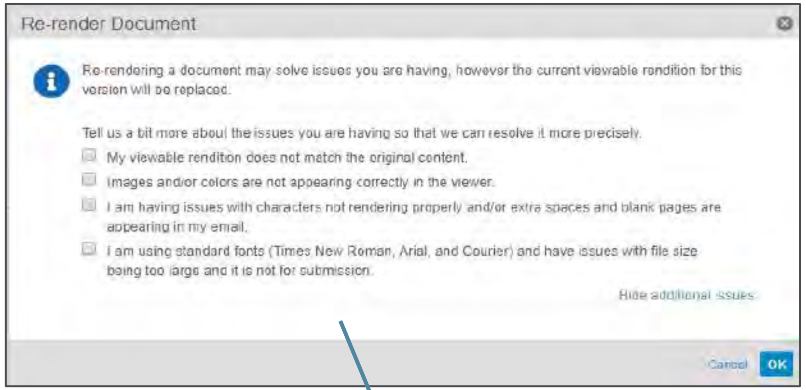
- Overview
  - Users can now see the accurate progress for new *EDL* (Expected Document List) *Item* records even when the *Batch Update* field is set to **No** or left blank, as long as the EDL matching job is active and has run at least once
- Impact
  - Previously, Vault would only update these fields via the continuous EDL matching job when the Batch Update field was set to **Yes**
  - This resulted in users seeing incorrect EDL Item progress
- Use Case
  - Customers can use this feature for content planning for campaigns
- Considerations
  - This feature is auto-on however, Vault will not update tracking fields on existing records where Batch Update is set to **No** or left blank unless a user updates the EDL Item record or the matched document, triggering continuous matching
  - To update all existing existing records, contact Veeva Support
  - Learn more about Continuous Matching

Remove Deprecated Re-Render Options

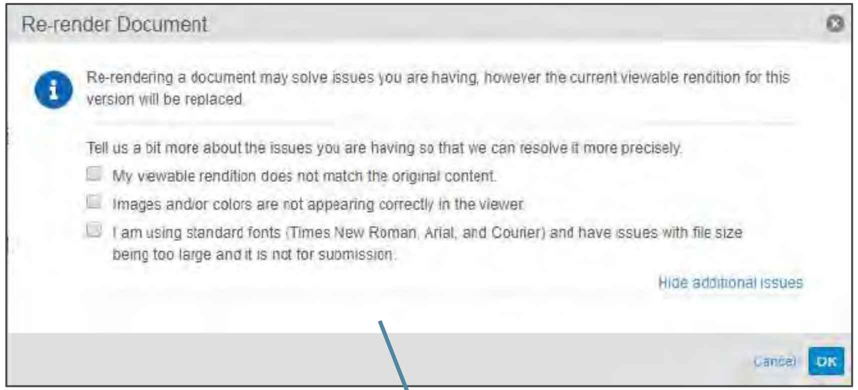
- Overview
  - Removes several re-render options that are no longer applicable
  - Other options that control rendition settings remain available in the Re-render Document dialog and are shown below
- Impact
  - Lays the groundwork for future enhancements and stops dependency on 3rd party rendering



Word Document



Email Document



HTML Document

Platform Data Model Changes

- Overview
  - With the 19R3 release, we have added the following fields to all new and existing objects, documents, and document versions: Global ID (global_id_sys) and Link (link_sys)
  - In addition, the following fields have been added to the User object: Activation Date (activation_date_sys), Inactivation Date (inactivation_date_sys), Send Welcome Email (send_welcome_email_sys)
- Impact
  - With every release, we update the data model to better support evolving needs and new feature functionality
- Considerations
  - These data model updates are automatically included in all Platform Vaults, but Admins must make configuration changes to make them available
  - This feature is not validated in pre-release Vaults