








# Veeva Commercial Vault 19R3 Deep Dive



# Agenda

1		Announcements
2		19R3 Release Calendar
3		Auto-On Features
4		Configurable Features

5		Admin Features
6		Objects
7		Resources



Announcements

# Veeva Commercial & Medical SUMMIT

Europe

3-5 December 2019 | Palau de Congressos de Catalunya



Connect with peers  
and experts



Gather top leader  
perspective



1,200  
Professionals



Hear latest technology  
innovations

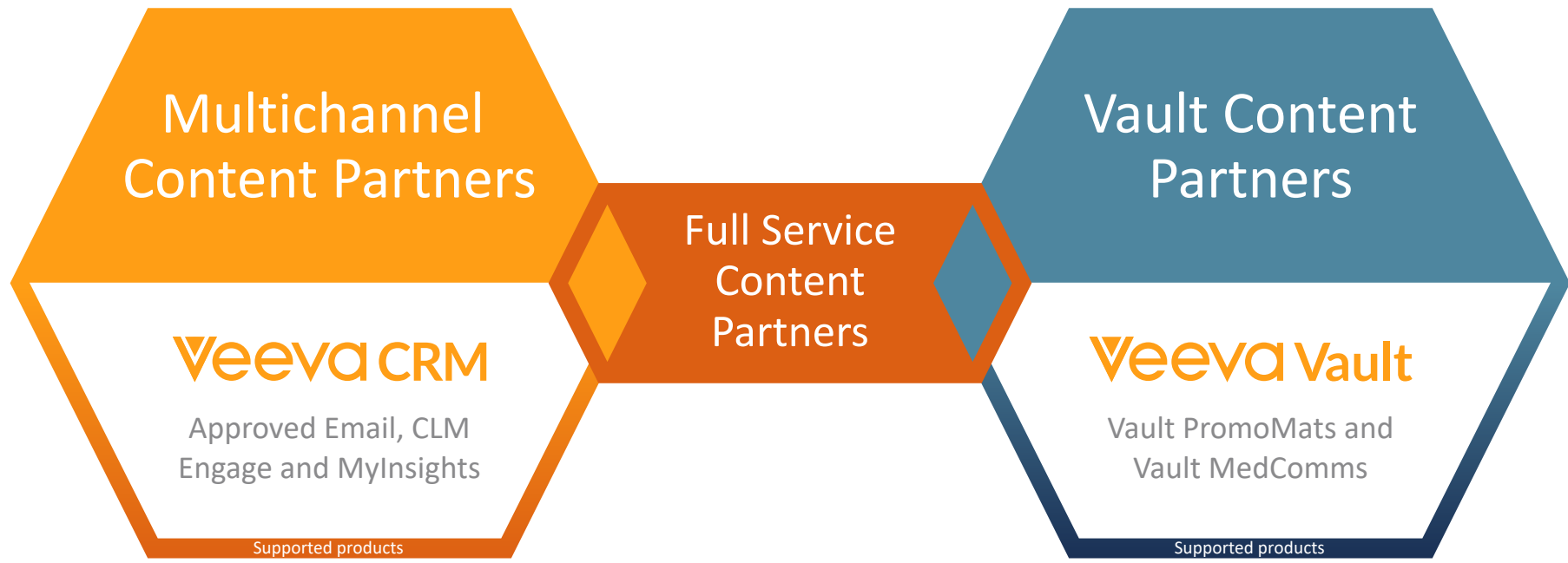
[Register Now!](#)



**Stacy Payne**  
Associate Director,  
Content Partners

# Veeva Content Partner Program

## 450+ partners and counting

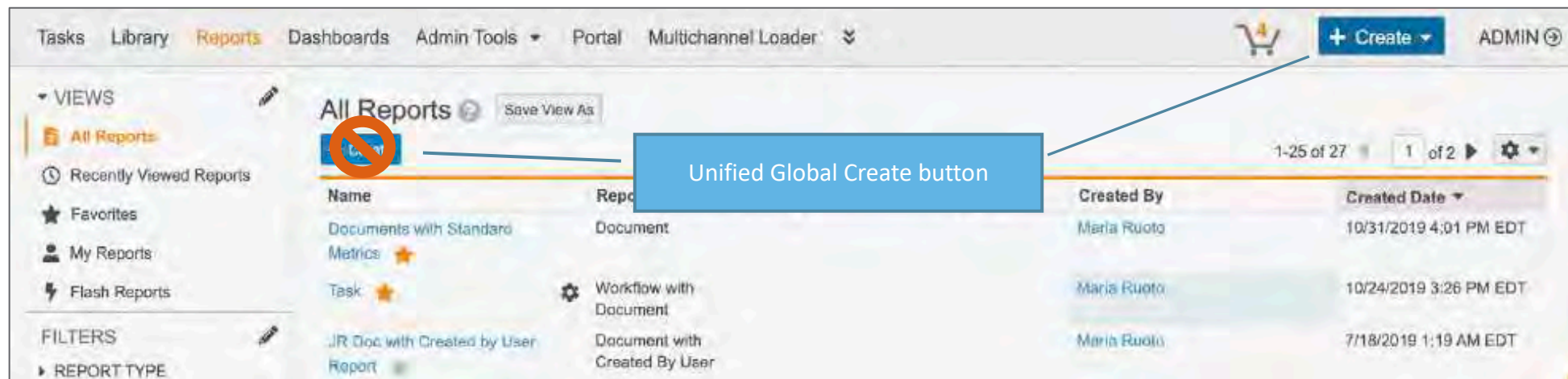


[Veeva.com/ContentPartners](https://veeva.com/ContentPartners)



# 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





**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

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

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

# VeevaWeb2PDF

VeevaWeb2PDF can be launched directly from Vault

-  **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

	Mon	Tue	Wed	Thu	Fri
	4 Pre-release vaults available	5 19R3 Commercial Vault release kit available	6	7	8
November	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
December	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)

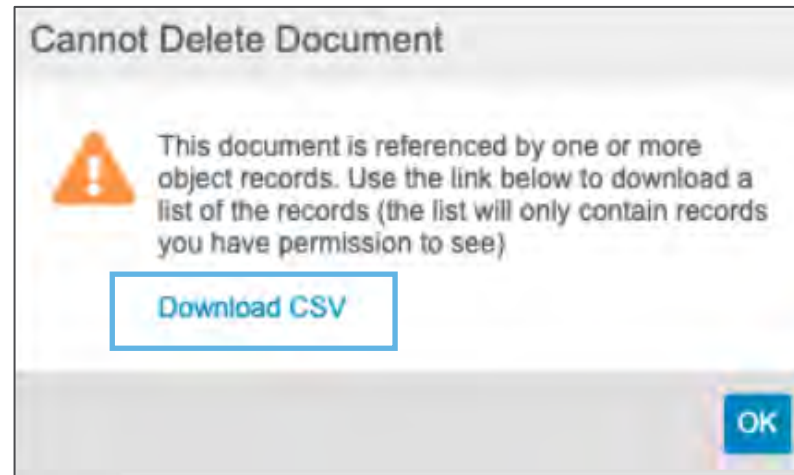
- Considerations

- 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

The screenshot shows the 'Login Audit History' page in the Vault PromoMats interface. The page includes a navigation menu with 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The 'Login Audit History' section has a 'Quick history' dropdown set to 'Last day' and a 'Data range' section with 'to' and 'Get History' buttons. Below this, it states 'Showing events for 03/10/2019 to 04/10/2019 (11 results)'. A table displays the audit history with columns: Timestamp (dd/MM/yyyy), User Name, Source IP, Type, Status, Browser, Platform, and Vault ID. The 'Vault ID' column is highlighted with a blue box. The table contains 11 rows of data.

Timestamp (dd/MM/yyyy)	User Name	Source IP	Type	Status	Browser	Platform	Vault ID
04/10/2019 08:36 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
04/10/2019 07:05 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 21:40 GMT	vaanmamats@eusc.com	88.184.90.246	User Login	Invalid Password	Unknown	Unknown	
03/10/2019 20:10 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:15 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:17 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:12 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 18:06 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 13:47 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 11:51 GMT	vaanmamats@eusc.com	88.175.181.234	User Login	Invalid Password	Chrome 77.0.3865.90	Intel Mac OS X 10.14.5	
03/10/2019 11:20 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601







# Download Notes to CSV

- Overview

- Users can download all 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

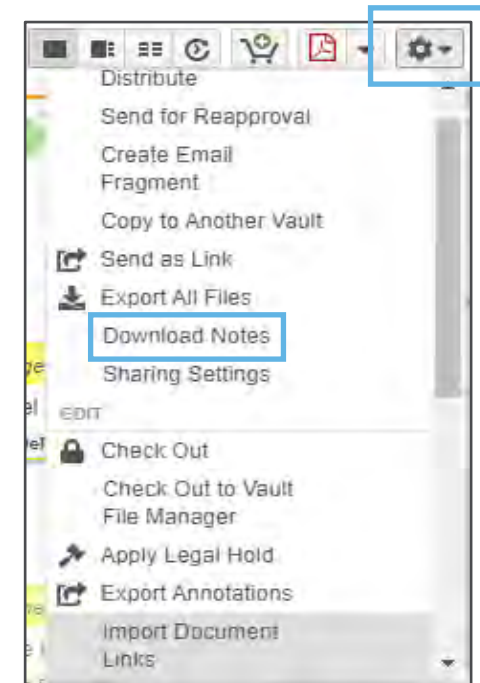
- Users now have a viable option to filter annotations and search comments

- 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

The screenshot shows the 'Document Audit History' page in Vault PromoMats. The left sidebar has 'Document Audit History' selected. The main area features a dropdown menu with 'User' selected, and a search box with the placeholder text 'Start typing to see a list of users...'. A blue callout box points to the dropdown menu with the text: 'Further filtering options are now available under Document Audit History'. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The user profile 'Felicity' and 'CSM User' are visible in the top right.

The screenshot shows the 'Object Record Audit History' page in Vault PromoMats. The left sidebar has 'Object Record Audit History' selected. The main area features a dropdown menu with 'Timestamp' selected, and a search box with the placeholder text 'Start typing to see a list of users...'. A blue callout box points to the dropdown menu with the text: 'Further filtering options are now available under Object Record Audit History'. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The user profile 'Felicity' and 'CSM User' are visible in the top right.





# 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











Vault PromoMats All Documents  DemoPMCZ-BAX Orville Mills

Tasks **Library** Reports Dashboards Admin Tools Portal References 8 + Create ADMIN

Cart (8)

Download Empty Cart

1-8 of 8

-  **Advertisement (v0.2)**  
DRAFT  
[Remove](#)
-  **Brighter Future eDetail Aid (v1.0)**  
APPROVED FOR PRODUCTION  
[Remove](#)
-  **Baxter\_PPT\_Slim (v0.1)**  
DRAFT  
[Remove](#)
-  **Baxter Global WF Test 1 - Job Owner with No Agency (v1.0)**  
APPROVED FOR DISTRIBUTION  
[Remove](#)
-  **Baxter Global WF - A Brighter Future eDetail Aid (v1.0)**  
APPROVED FOR DISTRIBUTION  
[Remove](#)
-  **AHA Guideline on Treatment of Cholesterol (v1.0)**  
APPROVED FOR USE  
[Remove](#)
-  **AAHA Diabetes Guidelines (v1.0)**  
APPROVED FOR USE  
[Remove](#)
-  **Voderal & Cholecap Combination Pill (v0.1)**  
SUBMIT TO HEALTH AUTHORITY  
[Remove](#)





# 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





# 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

Sales ID	Sales Type	Sales Date	Sales Count	Sales Manager	Sales Status	Sales Date	Sales Location	Sales Type	Sales
0000001	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000002	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000003	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000004	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000005	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000006	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000007	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000008	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000009	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00
0000010	View	01/01/2018	1	System	Success	01/01/2018 00:00:00	USA	System	01/01/2018 00:00:00







# 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](#)



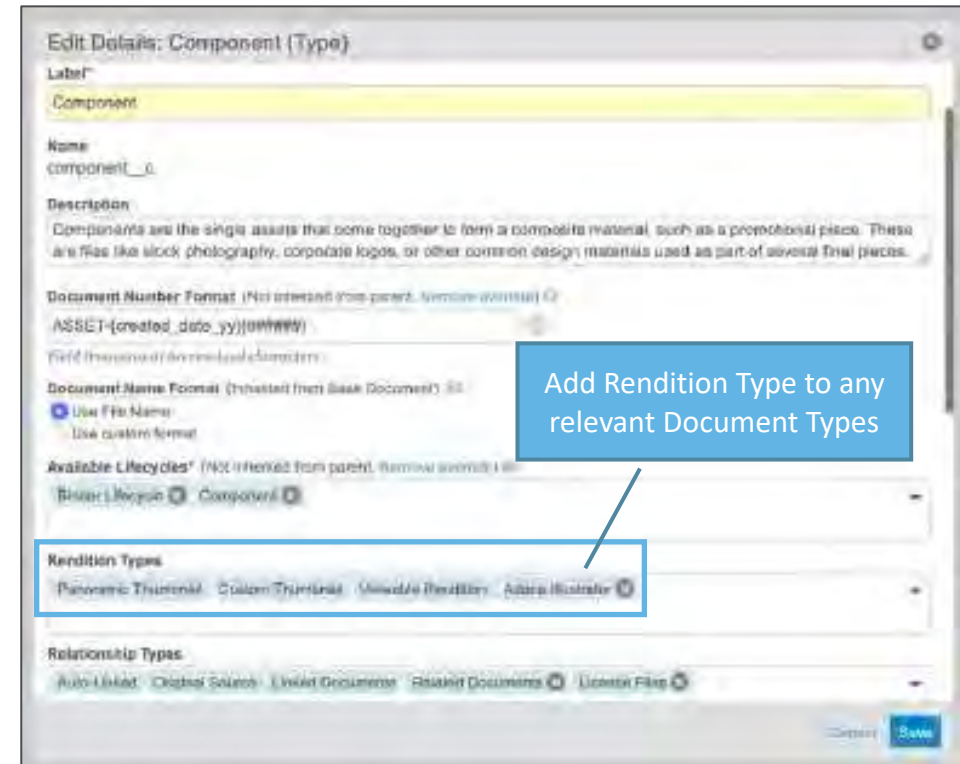
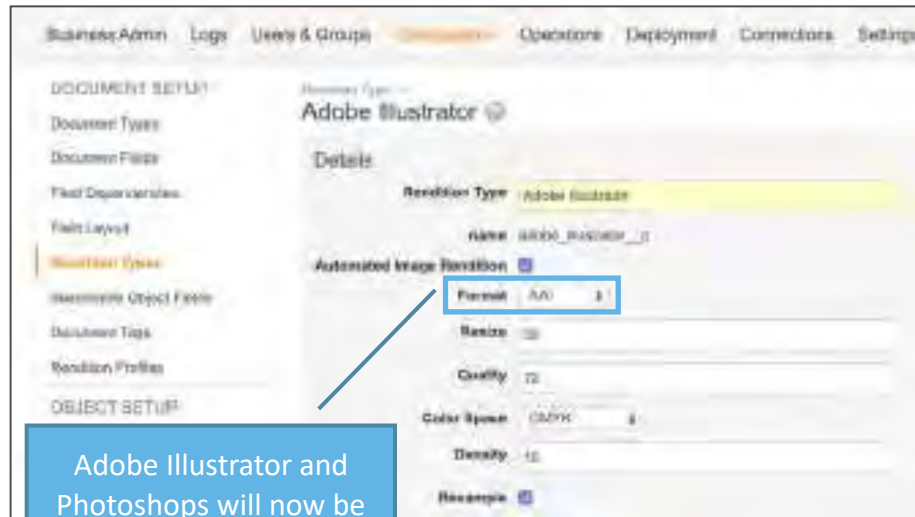




# Automated Image Rendition Support for Adobe Illustrator and Photoshop



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



- 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**

Begin typing and matching Objects will display for selection

Clicking the binoculars will open a Component search pop-out

Search: Components

Use search bar to find an item, and then use the table below to make selection.

product

Component Label	Component Type	Component Name
Product Guidelines	Object	product_country_c
Products	Object	product_v
CRM Product Type	Picklist	crm_product_type_v
CRM Product Groups	Object	crm_product_group_v
CRM Products	Object	crm_product_v

Displaying 1-6 of 5





# 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

The screenshot shows the Business Admin search interface. A search bar at the top contains the text "product". Below it is a table of search results. To the right of the table is a sidebar with "VIEWS" and "FILTERS" sections. A "Component search pop-out" callout points to the search bar. An "Advanced search" callout points to the search bar. A "Saved Views and Filters are also available" callout points to the sidebar. A "Business Admin > Products > Search Product" breadcrumb is shown at the bottom. An inset window on the right shows a "Saved View" dialog with a search bar containing "Product Name".

Component Label	Component Type	Component Name
Product Countries	Object	product_country_o
Products	Object	product_v
CRM Product Type	Picklist	crm_product_type_v
CRM Product Groups	Object	crm_product_group_v
CRM Products	Object	crm_product_v

Views:

- All Products
- Recent Products
- Favorites
- Products

Filters:

- CREATED DATE
  - is in the range
  - M/D/YYYY to M/D/YYYY
  - Apply
- THERAPEUTIC AREA
  - All
  - Hyperlipidemia 1
  - Osteology 1
  - (undefined) 7





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

Send for Coordinator Review

You are about to submit "infusionstock\_25080001 [Coordinator]" for review. Please complete the following fields to begin this workflow.

Review Coordinator\*

Mark Rudd

Please complete your review of this document

Due Date\*

10/29/2019

Please complete the required fields below:

Expiration Date\* 3/30/2020

Respiration Date\* 2/14/2020

One Off Use\*  Yes  No

Workflow to proceed

Task

PROPERTIES

Report Type Workflow with Document

FILTERS (1)

Workflow Name	Workflow Owner	Workflow Status	Workflow Start Date	Document Name	Task Instructions
Coordinator Review	Mark Rudd	Action	10/24/2019 3:36 PM EDT	infusionstock_25080001 [Coordinator] (10/1)	Please complete your review of this document





# 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

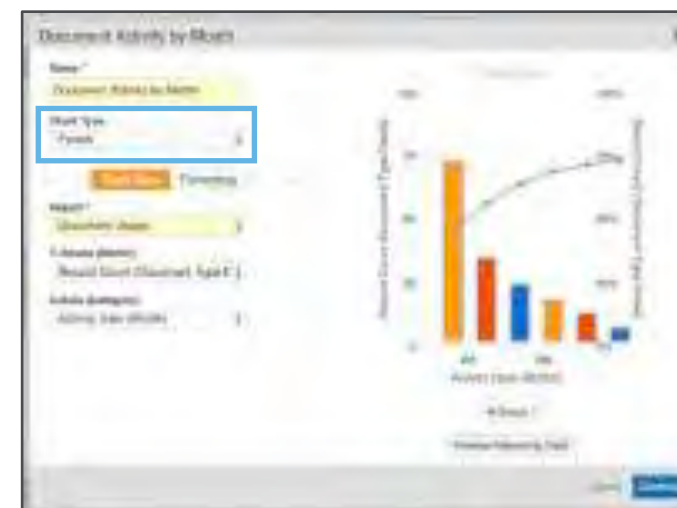
- Pareto charts will be available as an option when bar or column charts are available for selection
- Unlike a standard column chart, a 'Group By' option will not be visible for the pareto chart
- Formatting Options
  - Axis Labels can be edited and hide/show
  - You can choose to hide or show chart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

- Configuration

- Dashboards > Add Component > Chart Type

The screenshot shows the 'Formatting' tab of a chart configuration interface. It includes two tabs: 'Chart Data' and 'Formatting'. The 'Formatting' tab is active and contains several options, all of which are checked with blue checkmarks:

- Show X-Axis Label: Activity Date (Month)
- Show Y-Axis Label: Record Count (Document Type Detail)
- Show Chart Values
- Show Legend







# 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



- 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

The screenshot displays the Veeva Vault interface for a document titled "Cholecap A Brighter Future - US (v0.1)". The document is in "Pre-Approval" status, indicated by a blue arrow and the text "In Review and Approval". The interface shows a toolbar with an "Annotate" button (labeled '1') and a "Suggest Links" button. A second screenshot shows the "Suggest Links" button updated to "Suggested Links" (labeled '4'), with a blue callout box stating: "Button label becomes Suggested Links when links are returned" and "In View mode, a count of Suggested Links is displayed on button". Below, a larger screenshot shows the document text with annotations. A blue callout box states: "In Annotate mode, Suggested Links appear on document along with other annotations". A pop-up window shows a suggested link: "outperforms a placebo in clinical trials" with a close button (X) and a search result snippet: "Clinical Trial of Dietary Protein and Blood P... 2 days ago (v0,4)".



# 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*)

The screenshot displays the 'Document Types' configuration page in Veeva CRM. The left sidebar lists various setup categories like 'DOCUMENT SETUP', 'OBJECT SETUP', 'REPORT SETUP', 'QUERY SETUP', 'CHECKLIST SETUP', and 'VAULT NAVIGATION'. The main area shows 'Edit Details: Material (Type)' and 'Edit Details: Reference (Type)'. In the 'Material' configuration, the 'Enable Suggested Links Action' option is highlighted with a blue box and a callout box stating 'Enable Suggested Links Action on relevant document types'. In the 'Reference' configuration, the 'Enable Suggested Links Target' option is highlighted with a blue box and a callout box stating 'Enable Suggested Links Target on relevant document types'. Both callout boxes have arrows pointing to their respective options in the configuration forms.





# 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

The screenshot shows the Vault PromoMats interface. At the top, there is a navigation bar with 'System Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. Below this, the 'COMPONENT' section is active, showing 'Category' selected. The 'Picklist' section for 'Category' is displayed, with 'Details' showing: Label: Category, Name: annotation\_keyword\_category\_\_v, Source: Standard Picklist, and Used in: Claim Category (annotation\_keyword\_category\_\_v). Below the details is a table of 'Picklist values'.

Picklist Value Label	Picklist Value Name	Picklist Value Status
Cholesterol	cholesterol__c	Active
Cholesterol Efficacy	cholesterol_efficacy__c	Active
Cholesterol Indication	cholesterol_indication__c	Active
Cholesterol Study	cholesterol_study__c	Active
Cholesterol Wellness	cholesterol_wellness__c	Active





# Create Anchors

- Overview

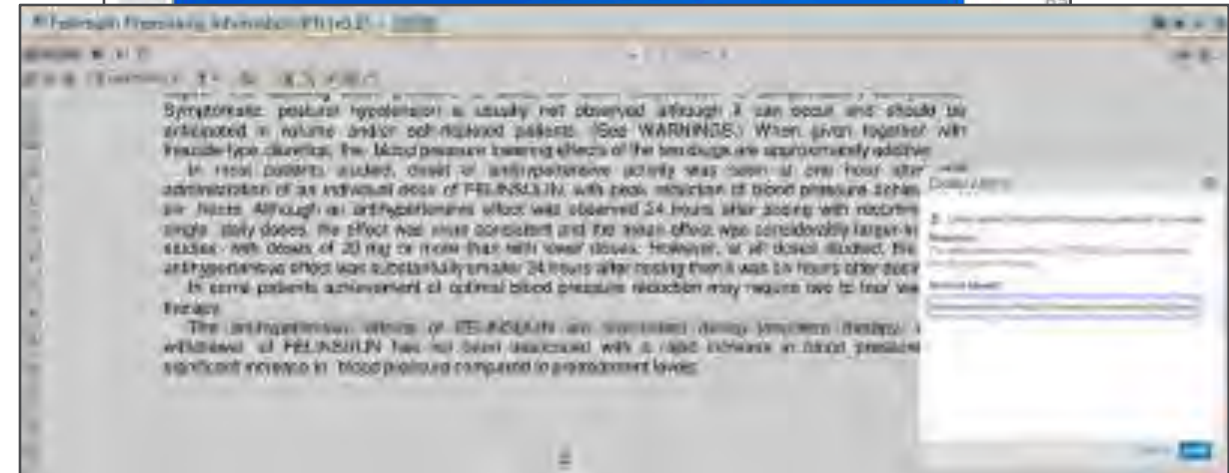
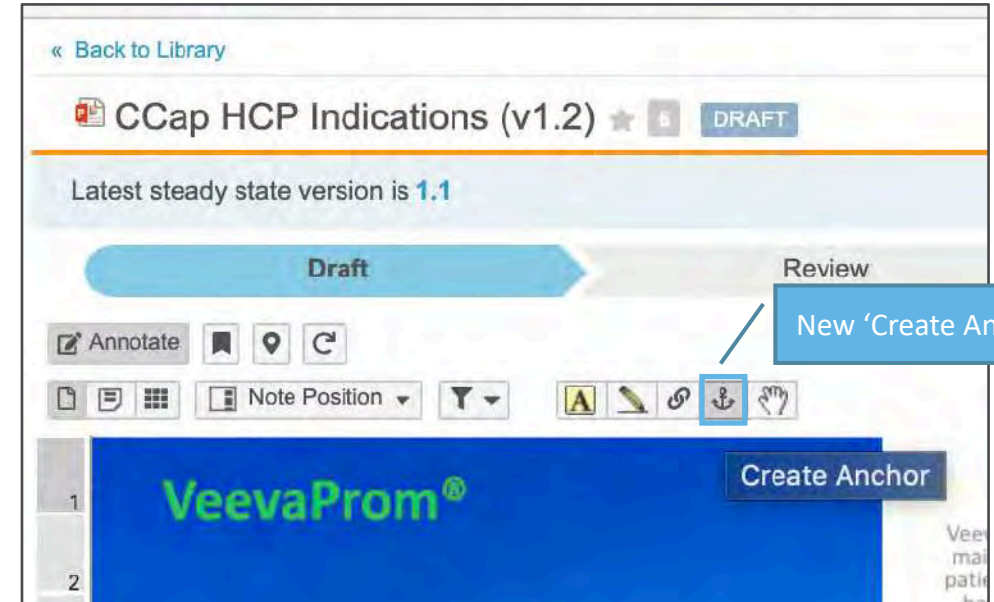
- This new tool enables users with the proper permissions (including the new 'Create Anchors' permission) to create anchors on documents directly

- 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]

Business Admin | Logs | Users & Groups | Configuration | Operations | Deployment | Connections | Settings | VAULT

DOCUMENT SETUP  
Document Types  
Document Fields  
Field Dependencies  
Field Layout  
Rendition Types  
Searchable Object Fields  
Document Tags  
Rendition Profiles

OBJECT SETUP  
Objects

REPORT SETUP  
Report Types  
Report Views

Document Lifecycles > Reference Documents > States > Draft

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

Security Settings

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 State
Owner	✓	✓	✓		✓	✓	✓		✓	✓		✓	✓
Coordinator													
Editor	✓	✓	✓		✓	✓	✓		✓	✓		✓	✓
Viewer	✓	✓					✓		✓				
Consumer													
Distribution Contacts													
Reviewer													
Approver													

New 'Create Anchors' permission





# Creating Claims Records

- Individual Claims need to be created in the Claims Object

The screenshot displays the Veeva Claims application interface. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configurations', 'Connections', and 'Settings'. The main content area is divided into a left sidebar and a main panel. The sidebar contains 'COMPONENT' (Claims), 'VIEWS' (All Claims, Recent Claims, Favorites), and 'FILTERS' (CATEGORY, PRODUCT). The main panel shows a table of claims with columns: Name, Product, Match Text, Category, Claim Risk, Country, and Lifecycle State. A blue box highlights the '+ Create' button with the text 'Click to create a new Claims Record'. A callout box points to the 'Category' column with the text 'Category does NOT act as a matching field'. A detailed view of claim 'CL-000014' is shown, with a blue box over the 'Details' section labeled 'Enter Claim information'. A yellow highlight on the 'Match Text' field is labeled 'Matching text'. A blue box over the 'Category', 'Product', and 'Country' dropdowns is labeled 'Matching fields'.

Name	Product	Match Text	Category	Claim Risk	Country	Lifecycle State
CL-000011	Cholecap	Now approved for the treatment of hypercholesterolemia in teenagers and young adults with familial hypercholesterolemia	Indication	Low	United States	Approved
CL-000012	Cholecap	Reduces risk of mortality by 41% with Cholecap vs placebo	Efficacy	Medium	United States	Approved
CL-000013	Cholecap	Directly				
CL-000014	Cholecap	Propo				
CL-000015	Cholecap	reduc				
CL-000016	Cholecap	increa				
CL-000017	Cholecap	directly				
CL-000018	Cholecap	report				
CL-000019						
CL-000020		test fo				
CL-000021		The is				

Claim: CL-000014

Match Text: An early, 7-month, randomised, double-blind, placebo-controlled phase 3 randomised controlled trial in 1,000 patients with hypercholesterolemia.

Category: Efficacy

Product: Cholecap

Country: United States

Lifecycle State: Draft

Created By: Jim McCough

Created Date: 04/20/2019 11:15 AM EDT

Last Modified By: Jim McCough

Last Modified Date: 04/20/2019 11:15 AM EDT

Claim Risk: Medium





# Creating Claims Records

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

The image shows two screenshots from a Veeva system interface. The left screenshot, titled 'References', displays a table with columns for Name, Reference Type, and Document. Two entries are visible: 'LT-000020' with Reference Type 'Document' and Document '21% to 42% Reduction in TII-G (v1.0)', and 'LT-000029' with Reference Type 'Anchor' and Document 'Cholecap Prescribing Information (PI) (v1.0)'. A blue box highlights the 'Reference Type' column, and a callout box points to it with the text 'Reference Links can be to Document and/or Anchors'. The right screenshot, titled 'Select anchors', shows a list of anchors for the document 'Reduction in 5-year non fatal MI and CHD death risk (v1.0)'. The 'Claims Document' choice is selected. Three anchors are listed: 'Lowering LDL-C and reducing 5-year vascular events (p.1)', 'Dyslipidemia (p.1)', and 'This is a new anchor (p.1)'. The first anchor is highlighted with a blue box.

Name	Reference Type	Document
LT-000020	Document	21% to 42% Reduction in TII-G (v1.0)
LT-000029	Anchor	Cholecap Prescribing Information (PI) (v1.0)

Reference Links can 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

Name	Product	Match Text	Category	Claim Risk	Country	Lifecycle State
CL-000011	Cholecap	Now approved for the treatment of hypercholesterolemia in teenagers and young adults with familial hypercholesterolemia	Indication	Low	United States	Approved
CL-000012	Cholecap	Reduces risk of mortality by 41% with Cholecap vs placebo	Efficacy	Medium	United States	Approved
CL-000013	Cholecap	stably and metabolic syndrome		Low	United States	Approved
CL-000014	Cholecap	Proportional relationship between lowering LDL-C and reducing 1-year major vascular events	Clinical Study		United States	In Review
CL-000016	Cholecap	reduce complications by 20-50%	Efficacy	Medium	United States	Draft
CL-000018	Cholecap	increase in patient compliance directly attributable to patient self-reporting of fewer AEs	Compliance		United States	In Review
CL-000017	Cholecap	Stroke risk reduction at 24 months	Efficacy		United States	Draft
CL-000015	Cholecap	Complications of long term elevated Cholesterol		Low	United States	Approved
CL-000019	Cholecap	Cure cholesterol issues	Efficacy	High	United States	Approved
CL-000020		test test test test test test				In Review
CL-000021		This is a new anchor.				Draft

MANAGE  
Change State to In Review  
EDIT  
Edit  
Copy Record  
Delete  
VIEW

MANAGE  
Change State to Draft  
Change State to Approved  
EDIT  
Edit  
Copy Record  
Delete  
VIEW  
Audit Trail

Blurred screenshot of the 'All Claims' table with a bulk action menu open on the right side.

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 not 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

Claim: Cholecap Safety 1 ACTIVE

Details

Name Cholecap Safety 1

Status Active

Category Safety

Claim Phrase safe when used as

Match Text safe when used as

Product CholeCap

Language English

Target Sample Claim Doc

Created By Ownerman McDou

Created Date 27 Feb 2019 3:57

Last Modified By Ownerman McDou

Last Modified Date 27 Feb 2019 3:57

INFORMATION

General Properties

Name Cholecap Hls (Cholecap)

Title

Type Monoclonal Protein

Subtype Advertisement

Classification Newcomer

Document Number PP-CO-0166

Created By Ownerman McDougle on 01 Jun 2019 8:19 AM EDT

Batch Number

Last Modified By Ownerman McDougle on 01 Jun 2019 8:19 AM EDT

Version 0.1

Lifecycle Monoclonal Protein

Status Draft

Country

Language English

Agency

Center

Tags Efficiency, Safety

Template Document

Rights Management

File Info

Linked Documents (3)

Linked Claim Documents (0)

Linked Pivots (3)

Supporting Documents (1)

Product Information

Product CholeCap

## 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 and picklist fields

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







# Creating Claims Records

## Match Fields Matrix

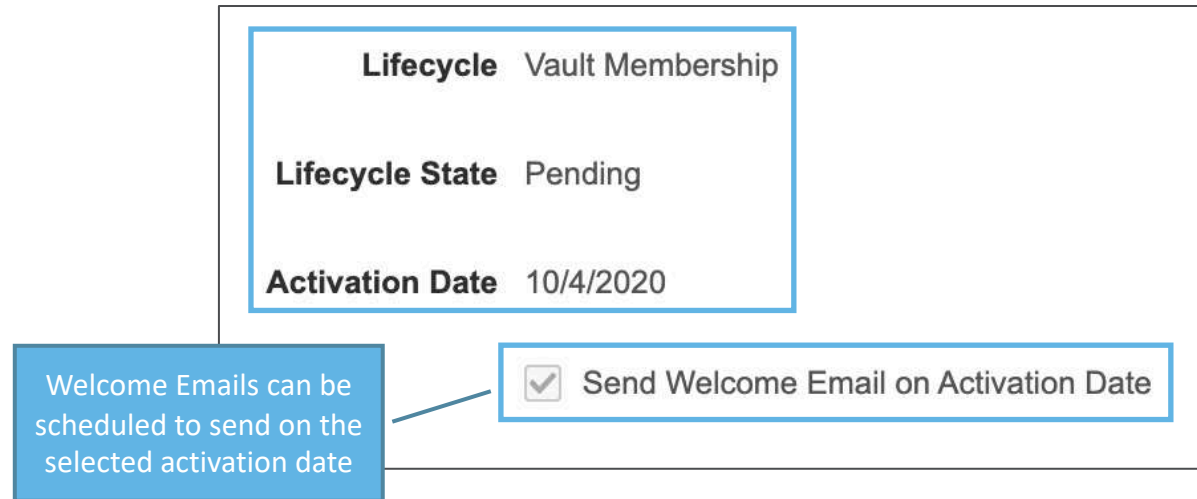
<b>"Symptom"</b>		Multi-value picklist on both Claim and Doctype.)							
	<b>Doc</b>	(blank)	fever	headache	fatigue	fever, headache	fever, fatigue	headache, fatigue	fever, headache, fatigue
<b>Claim</b>									
(blank)		match	match	match	match	match	match	match	match
fever		non-match	match	non-match	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
<b>"Product"</b>		Single-value object reference on Claim; multi-value object reference on Doctype.							
	<b>Doc</b>	(blank)	Cholecap	Restolar	Zylocap	Cholecap, Restolar	Cholecap, Zylocap	Restolar, Zylo	Cholecap, Restolar, Zylocap
<b>Claim</b>									
(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

Activation Details

Lifecycle

Lifecycle State

Send Welcome Email on Activation Date

Inactivation Date

Add

Activation Date

Global ID

ID

Link

Space

Admins can create a new Section or update an existing 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

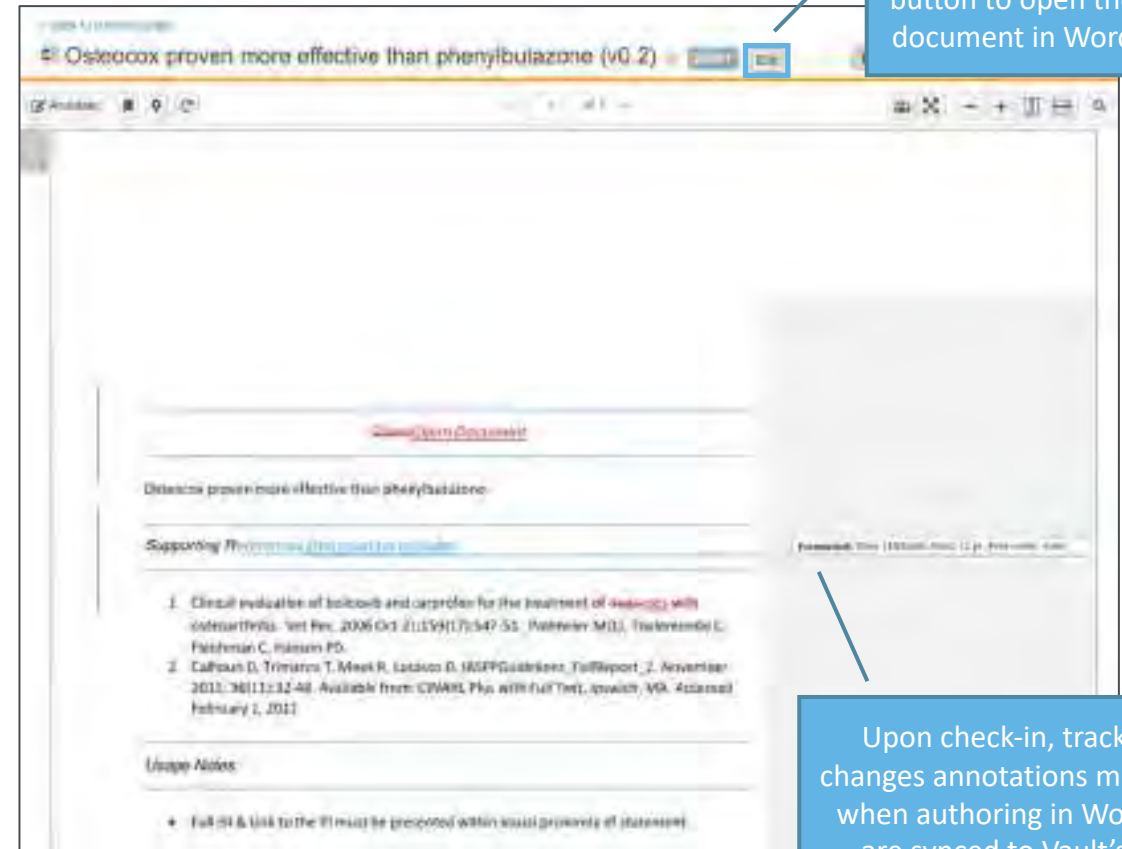


- Overview

- 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

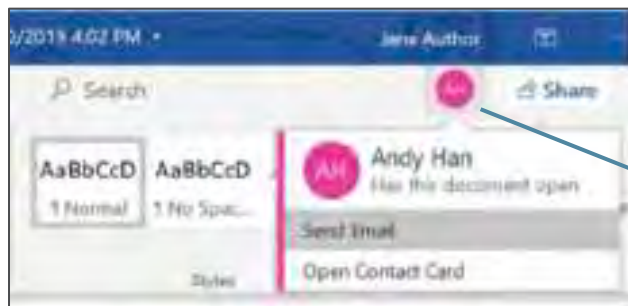
- Impact

- Multiple users will be able to author/edit Microsoft Word documents simultaneously using Office desktop software, Office Online™, or the Office mobile apps



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



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

# 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

Collaborative Authoring with Microsoft Office ?

Office Application Settings

Directory (tenant) Id

Application (client) Id

Client Secret

Office User Settings

Collaboration User

Collaboration Drive

Integration Status

Not Authorized

Authorize

Click on Authorize to check the connection

Integration Status

Verified

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



# Collaborative Authoring with Microsoft Office



The screenshot displays the Vault PromoMats web interface. At the top, there is a navigation bar with the Vault logo, 'All Documents', a search bar, and user information 'Deep Dive Vault' and 'CSM User'. Below this is a secondary navigation bar with 'Tasks', 'Library', 'Reporting', 'Portal', 'More', and various document categories. The main content area shows a document titled 'Raxxipen Quick Guide Video Script (v0.2)' in a 'Draft' state. A progress bar indicates the document's lifecycle stages: Draft (active), In Review, Approved, and Expired. The document content is displayed in a large text area with a watermark, containing several paragraphs of text. To the right, an 'INFORMATION' sidebar provides metadata for the document, including Name, Description, Document Number, Version, Status, Country, Product, Lifecycle, Type, Subtype, Tags, Last Modified By, Created By, Language, Copy Depth, Cycle Campaign, Production CDN URL, Staging CDN URL, Lifecycle State Stage ID, and Lifecycle Stage.

**Document Title:** Raxxipen Quick Guide Video Script (v0.2)

**Status:** Draft

**Document Content:**

Welcome to the new quick guide for Raxxipen.

Do not use Raxxipen without proper training from your doctor or nurse. Always read the instructions carefully before using Raxxipen for the first time.

Raxxipen is an insulin pen with a dose memory function.

For single patient use only. Do not share Raxxipen or Insulin cartridges with other patients. Sharing the Pen can result in the spread of infections from one patient to another, even if the needle is changed.

Raxxipen is designed to be used with Vinsulin Cartridges and Raxxipoint or other compatible needles.

To prepare Raxxipen with a new Raxxira cartridge, first pull off the pen cap and twist the pen apart. If the piston rod is sticking out push it back in. Push the pen back together until you hear or feel a click.

Right before injection, always attach a new needle. This reduces the risk of blocked needles. Contamination, infection, and inaccurate dosing. If using Raxxipoint, screw the needle straight and tightly onto the pen.

**Document Metadata (INFORMATION sidebar):**

- Name:** Raxxipen Quick Guide Video Script
- Description:**
- Document Number:** VV-01001
- Version:** 0.2
- Status:** Draft
- Country:** United Kingdom
- Product:** Raxxipen
- Lifecycle:** Material Review & Approval
- Type:** Medical Device Material
- Subtype:** Promotional
- Tags:** New, Dosing
- Last Modified By:** CSM User on 05/11/2019 13:14 GMT
- Created By:** CSM User on 05/11/2019 13:08 GMT
- Language:** English
- Copy Depth:** 1
- Cycle Campaign:**
- Production CDN URL:**
- Staging CDN URL:**
- Lifecycle State Stage ID:** STATESTAGE00001
- Lifecycle Stage:** Draft





# 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 and User Task Refresh Edit Settings

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

Workflow with Document Information from original join

User and Task information from inner join

Inner Join Report





# 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

The screenshot displays two overlapping windows from the Veeva system. The top window, titled 'Details', shows configuration for a 'Delegate Test Group'. It includes fields for 'Status' (Active), 'Label\*' (Delegate Test Group), 'Name' (delegate\_test\_group\_\_c), and 'Description'. A dropdown for 'Included Security Profiles' is empty. The 'Source' is set to 'Custom' and the 'Type' is 'User Managed Group'. A checkbox labeled 'Delegate access allowed only among group members' is checked and highlighted with a blue box. Below these are fields for 'Created By', 'Created Date', 'Last Modified By', and 'Last Modified Date', all showing 'Nathan DePalma' and '8/30/2019 10:28 AM PDT'. The bottom window, titled 'Add Delegates', features a yellow notice: 'Notice: A maximum of 25 users may be delegates.' Below this is a search field for 'Delegates\*' with the placeholder text 'Start typing to see a list of users...'. A dropdown menu is open, showing the user 'Robert Klimkowski RobertKlimkowski@vv-csm.com'. At the bottom of this window are 'End Date\*' radio buttons for 'Never' and 'On' (selected), and 'Cancel' and 'Grant Access' buttons.



# Delegate Access: Restrict Delegate Selection

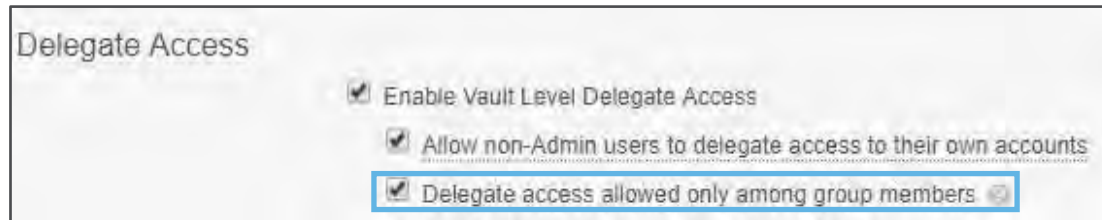


- Considerations

- 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

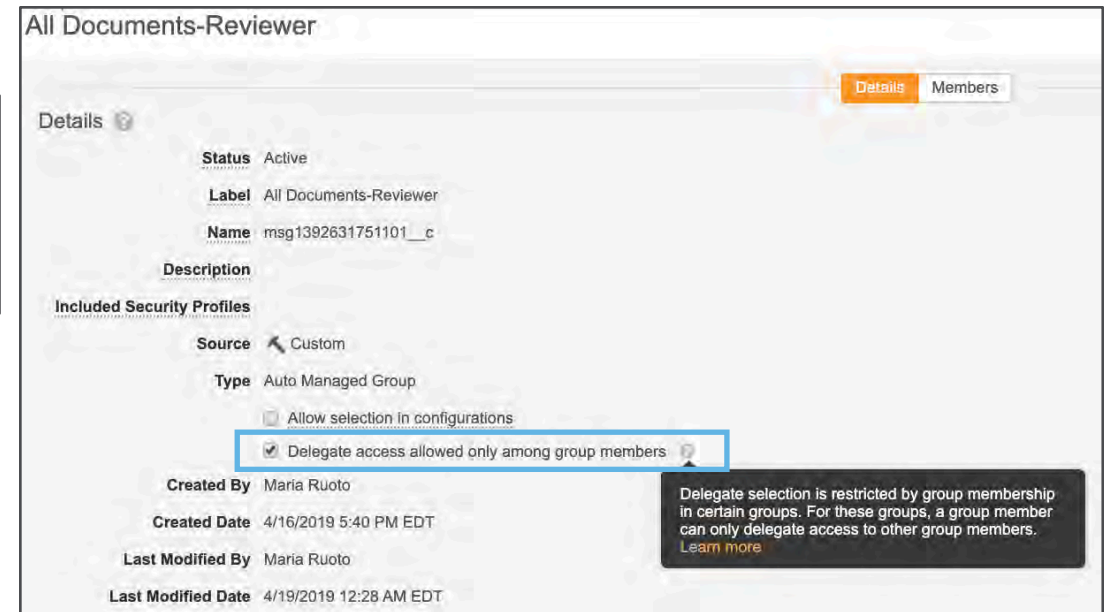
- Configuration

- Admin > Settings > General > Delegate Access



- Learn more about [Delegate Access](#)

- Admin > Users & Groups > Groups



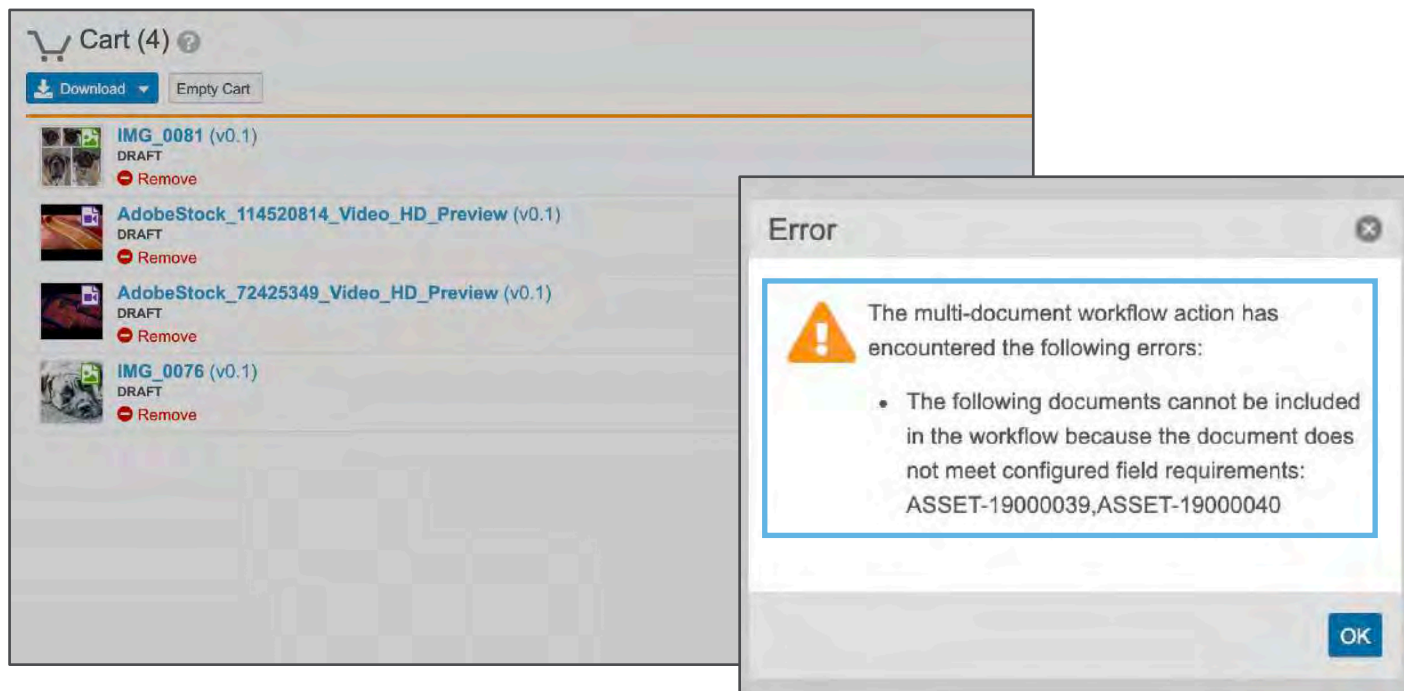


# MDW: Constrain Multi-Document Workflow Based on Document Status & Field Values



- 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

Rule 7

Always  Perform with conditions

If Complexity equals Low

+ Add condition

Allow the following actions

Workflow

Expedited Approval

Action Label\* Send on Expedited Approval

Icon Veeva

+ Add Action

- Configuration

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

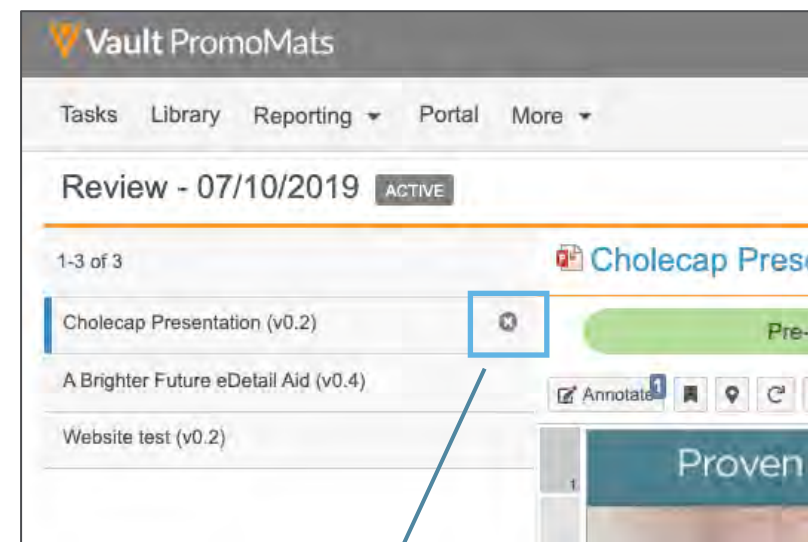




# MDW: Remove Documents from Envelope



- 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

Timestamp (M/d/yyyy)	User Name	Version	Event Description
11/10/2019 2:45 PM EST	mana.ruolo@csmdam.com	0.1	Viewed Document
11/14/2019 2:30 PM EST	mana.ruolo@csmdam.com	0.1	Viewed Document
11/14/2019 2:30 PM EST	System	0.1	"Simple Review and Approval" task assigned to "mana.ruolo@csmdam.com" Review Rejected Documents
11/14/2019 2:30 PM EST	mana.ruolo@csmdam.com	0.1	"Simple Review and Approval" task complete: "Review Task" with outcome "Rejected"; "Context": "Quality issue"; "Rejection Justification": "Image quality is poor"





# MDW: Verdict-Based Prompt for Comments and Reasons



- Configuration

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

Verdicts

Verdict Label\* Approve

- Add Comments
- Add Signature
- Add Reasons

Verdict Label\* Reject

Prompt for Comments

Rejection Justification  Required

• Add Signature

Reasons Label\* Context  Required

Reason Values\*

- ISS Issue
- Quality Issue
- Reference Issue
- Changes not made

Type new values and hit 'Enter' to add



# MDW: Updated Envelope Viewer



- Overview

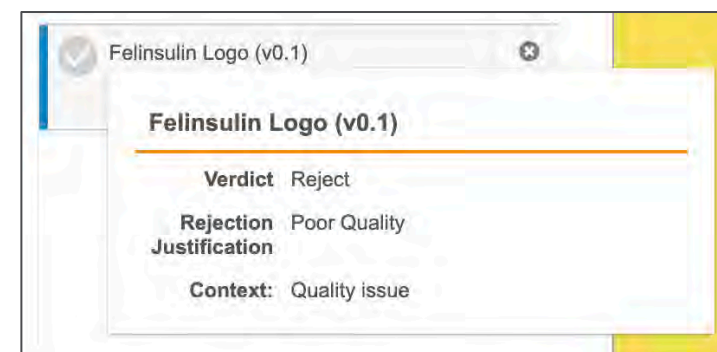
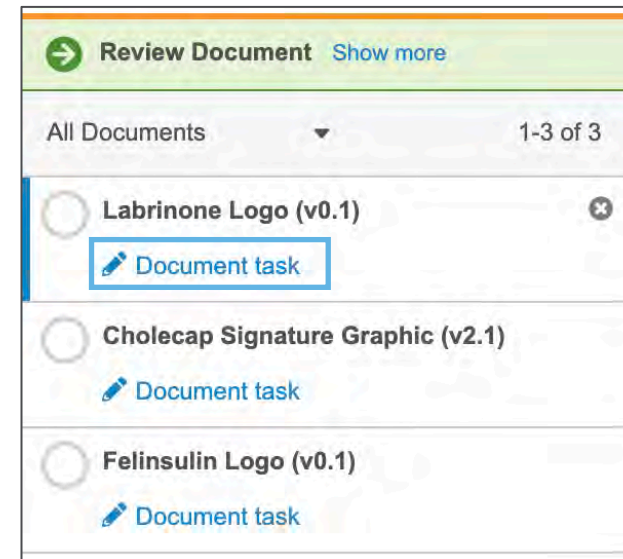
- In order to support the ability to capture Verdict Comments and Reasons, the Multi-Document Workflow Envelope Viewer now includes a ‘Document task’ link for each document

- 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

The screenshot displays the configuration interface for Multi-Document Workflows (MDW). On the left, a 'Components' table lists various workflow components. The 'Document Lifecycle' component is highlighted with a blue box, and a callout points to it with the text 'Multi-Document Workflow for a specific lifecycle'. The main area shows two rule configurations, 'Rule 2' and 'Rule 3'. 'Rule 2' has the 'Perform with conditions' option selected, and a callout explains: 'The user action can be configured to always be available or to be available based on conditions'. 'Rule 3' has the 'Always' option selected. Both rules show the 'Action Label\*' field with the value 'Initiate Graphic Workflow (MDW/Envelope)' for Rule 2 and 'Initiate Component MDW/Envelope Workflow' for Rule 3.

Multi-Document Workflows Components	
<b>Details</b>	
Label	Components
Name	components_c
<b>Document Lifecycle</b>	Component
Status	Active
Description	

**Rule 2**

Always  Perform with conditions

Workflow: Subtype Includes Component

**Allow the following actions**

Workflow: Components

Action Label\*: Initiate Graphic Workflow (MDW/Envelope)

**Rule 3**

Always  Perform with conditions

**Allow the following actions**

Workflow: Components

Action Label\*: Initiate Component MDW/Envelope Workflow

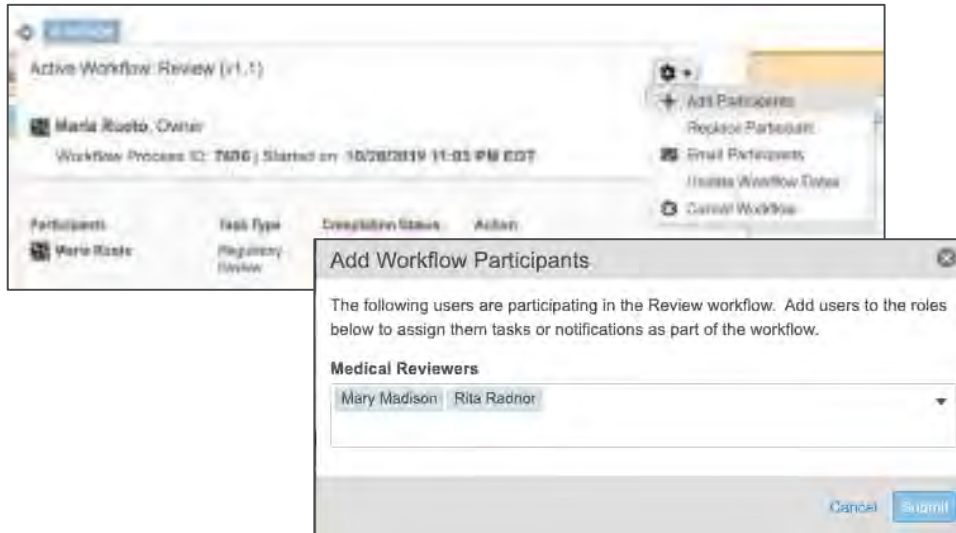
# Add Participants to Unselected Optional Tasks



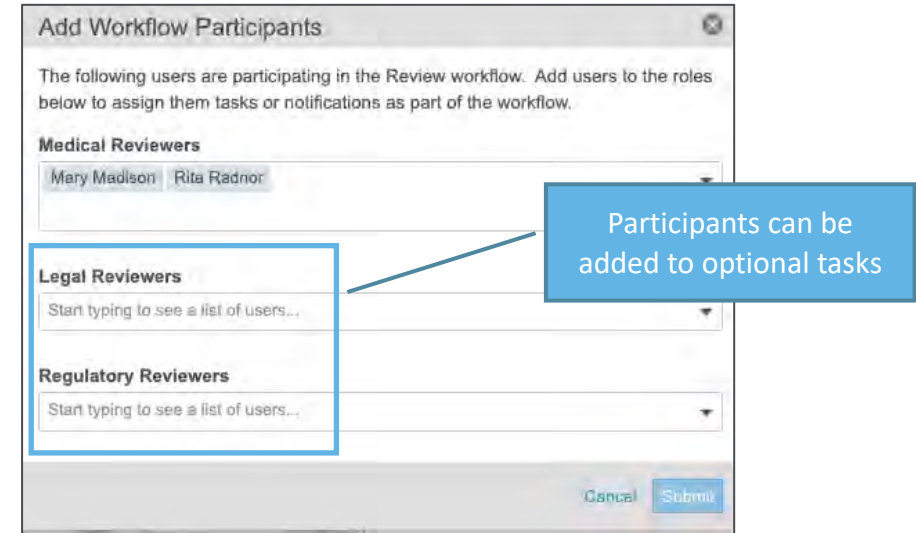
- Overview

- 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

The screenshot displays the 'Standard Metrics' interface. On the left is a summary panel with the following details:

- Global Content Type: Digital Promotion
- Content Creation Currency: United States Dollar
- Content Creation Cost: United States Dollar = 2. \$1001 to \$10,000
- Initial In Review Date: 10/16/2019 12:16 PM PDT
- Days to Enter Review: 1
- Days in Review: 0
- Number of Review Cycles: 1
- Initial Steady State Date: 10/16/2019 12:18 PM PDT
- Days to Approval: 1

On the right is a table titled 'Documents with Standard Metrics'. The table has columns for Document ID, Document Name, Document Type, Category, Content Status, Days to Enter Review, Days in Review, Number of Review Cycles, and Days to Approval. A blue box highlights the last four columns of the table.

- 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

- Standard Metrics	
Global Content Type	Moving Markets
Content Creation Currency	Decline to Provide
Content Creation Cost	
Initial In Review Date	10/01/19
Days to Enter Review	3
Days In Review	5
Number of Review Cycles	2
Initial Steady State Date	10/06/19
Days to Approval	8

Content Creation Currency: [Dropdown menu showing 'Decline to Provide' selected]

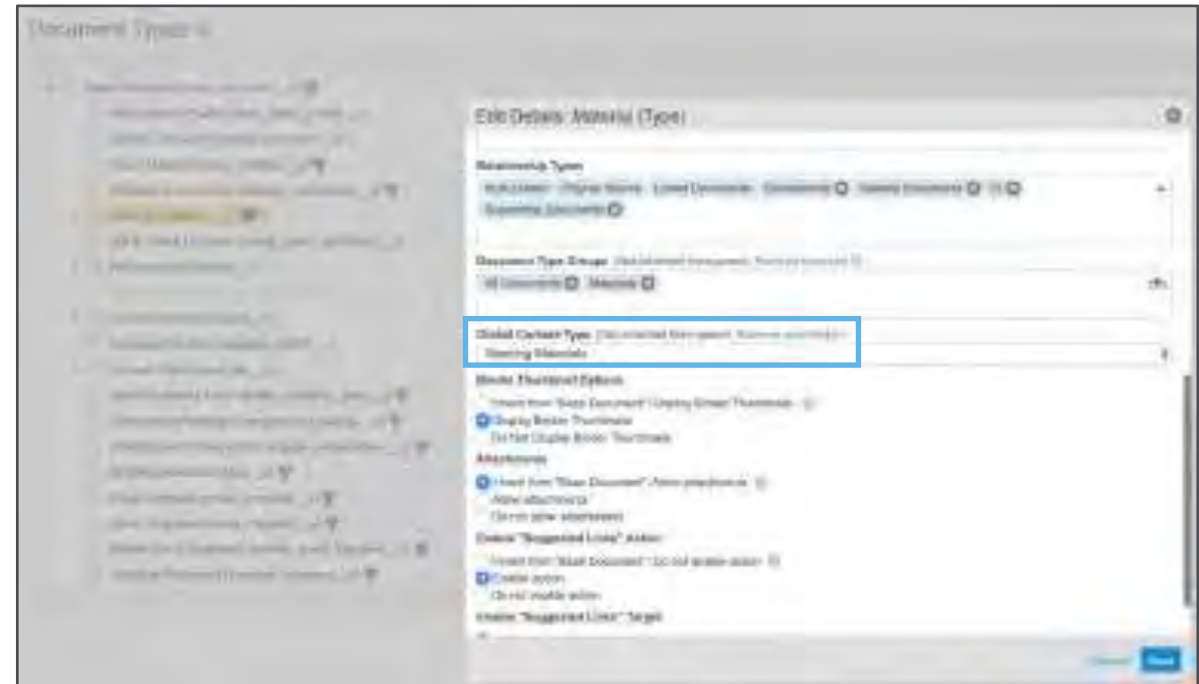
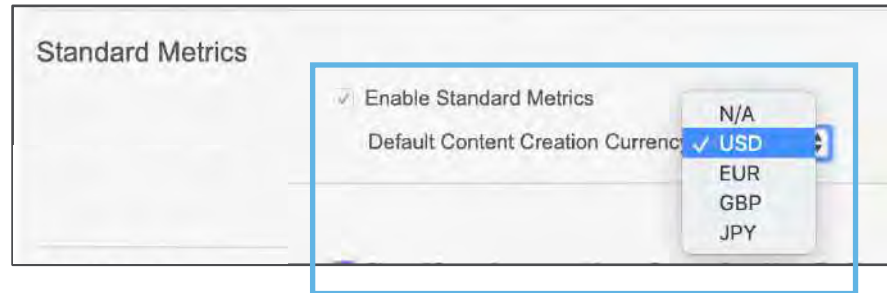
Global Content Type	Multichannel
Content Creation Currency	Decline to Provide

# 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

Step 3: Set the options

Status: Active

User must always enter a value (required)

Values must be unique

Display in default lists and hovercards

Do not copy this field in Copy Record

Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)

Toggle On/Off will be applied asynchronously

- 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



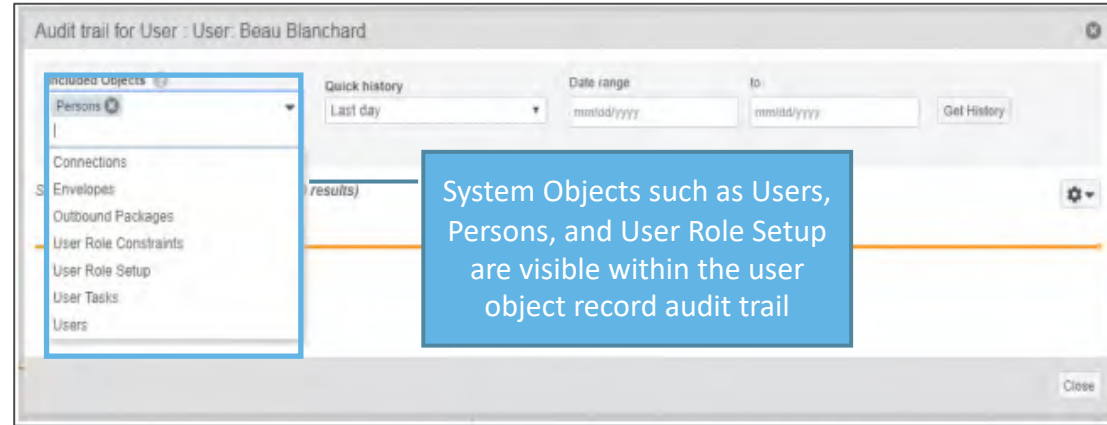


# System Objects Supported in Related Record Audit Trails



- 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](#)



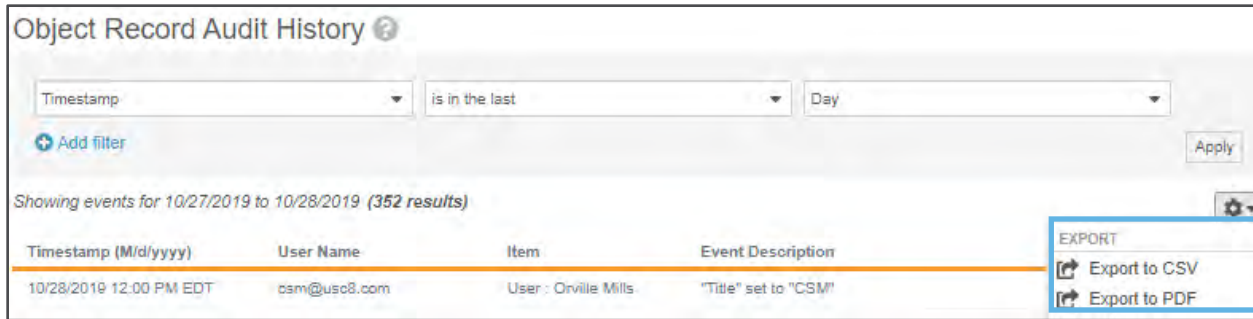


# Record ID & Object Label Column in Object Audit Exports



- 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

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

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

- 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

Campaigns >  
Campaign: Healthy Hearts Campaign ★ ACTIVE

Campaign Details

Name	Healthy Hearts Campaign	Audience	Consumer / Patient
Start Date	10/28/2019	Product	<a href="#">Cholecap</a>
End Date	11/29/2019	Brand Guidelines	<a href="#">Click for Brand Guidelines</a>

System Details

Link will take you to the brand guidelines stored in google drive shared folder

Users >  
User: Orville Mills ★ ACTIVE

Details

General Info

Name	Orville Mills	Title	CSM
First Name	Orville	Image	
Last Name	Mills	OrgWiki Profile	<a href="#">OrgWiki Profile Orville Mills</a>
User Name	orville.mills@usc8.com		
Email	orville.mills@veeva.com		

Link will take you to the user's Company OrgWiki profile page

- 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](#)

Objects > Campaign > Fields > Create Field

Step 1: Select the field type

- Text
- Number
- Date
- DateTime
- Yes/No
- Picklist
- Object
- Parent Object
- Lookup
- Formula**
- Currency

Step 2: Choose label and name for the field

Label\* Brand Guidelines

Name\* brand\_guidelines1

Step 3: Set the options

Status Active

Display in default lists and hovercards

Return Type Link

Help Content

Step 4: Set Formula Expression

Fields | Functions | Operators

Search Fields

Hyperlink('https://drive.google.com/file/d/1d\_jLFh\_BvenAmRz1IZ2OsFemJzo\_wa0-view?usp=sharing', 'Click for Brand Guidelines', 'new\_window')

Check Syntax

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

Product: Cholecap ★ **ACTIVE**

▶ Product Details

▼ Countries Approved for Sale/Marketing

**+ Add**











Name ▶	Country Name > Country Name	Approval Status	Local Product Name
Canada	Canada	Approved	Cholecap-CA
China	China	Not Approved	
Germany	Germany	Approval Pending	Cholecaper
Italy	Italy	Approved	Colecap
United Kingdom	United Kingdom	Approved	Choletab

Search: Country

Use search bar to find an item, and then use the table below to make selection.

▶ Filters

**+ Create**

Country Name	Country Abbreviation	Distribution Cod
Australia	 AU	
Austria	 AT	
Belgium	 BE	
Canada	  CA	
China	  CN	
France	 FR	
Germany	  DE	
Global		
India		

This Country record is already related to the current record of Product.  
[Learn more](#)



# 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](#)

Configuration ?

**Model** This object supports a complex relationship between Country and Product.

**Unique Keys**

---

Options

- Display in Business Admin menu
- Allow attachments
- Enable Signatures
- Audit data changes in this object
- Relate Multiple Records





# 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

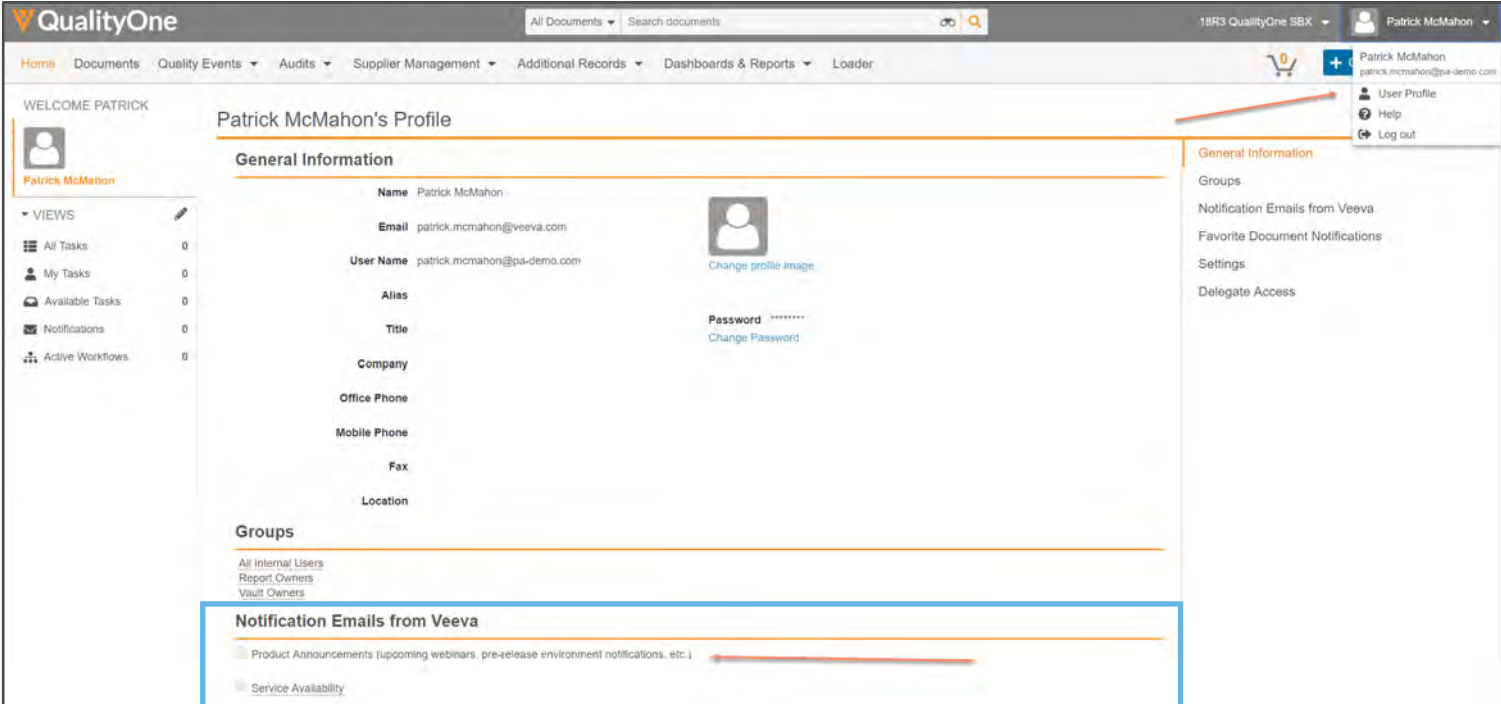
The screenshot shows the 'Login Audit History' page in the Vault PromoMats interface. The page includes a search bar, a date range selector, and a table of login events. The table has the following columns: Timestamp (dd/MM/yyyy), User Name, Source IP, Type, Status, Browser, Platform, and Vault ID. The Vault ID column is highlighted with a blue box.

Timestamp (dd/MM/yyyy)	User Name	Source IP	Type	Status	Browser	Platform	Vault ID
04/10/2019 08:36 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
04/10/2019 07:05 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 21:40 GMT	vaanamat@eusc.com	88.174.90.246	User Login	Invalid Password	Unknown	Unknown	
03/10/2019 20:10 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:15 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:17 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:12 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 18:06 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 13:47 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 11:51 GMT	vaanamat@eusc.com	88.175.181.234	User Login	Invalid Password	Chrome 77.0.3865.90	Intel Mac OS X 10.14.5	
03/10/2019 11:20 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601



# Release Notification

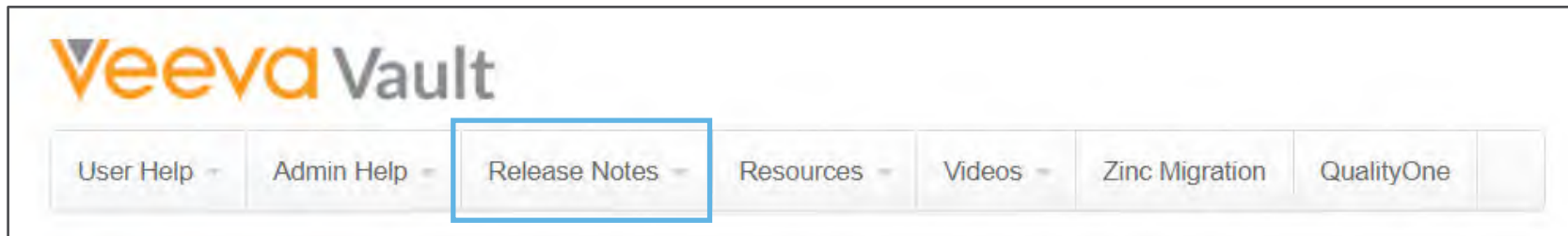
- Vault users opt in via their User Profile to receive email notifications about:
  - Upcoming General Releases
  - Invitations to General Release overview webinars
  - Pre-release & validation availability
  - Go-live date reminders
- Users that do not check the box will not be receive notifications



The screenshot displays the QualityOne user profile page for Patrick McMahon. The page is divided into several sections: 'General Information', 'Groups', and 'Notification Emails from Veeva'. The 'Notification Emails from Veeva' section is highlighted with a blue box and contains two checkboxes: 'Product Announcements (upcoming webinars, pre-release environment notifications, etc.)' and 'Service Availability'. Both checkboxes are currently unchecked. A red arrow points to the 'Notification Emails from Veeva' section header, and another red arrow points to the 'Product Announcements' checkbox. The page also shows a navigation menu on the left, a search bar at the top, and a user profile dropdown menu on the right.

# 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

The screenshot displays the Veeva Compliance Docs web application. At the top, the header includes the Veeva logo, the text 'Veeva Compliance Docs', and navigation options like 'Validation Packages' and a search bar. The user 'Patrick McMahon' is logged in. Below the header, there are tabs for 'Validation Packages', 'Validation Documents', 'Operations Reports', and 'Informational Documents'. The main content area shows a 'Vault v18R3 Validation Binder (v1.0)' which is marked as 'APPROVED'. It displays a list of documents within the binder, including 'Detailed ERES Trace Assessment - Vault (Approved, v1.0)', 'System Overview for Veeva Vault (Approved, v1.0)', and 'System Overview for Veeva Vault v13 (Approved, v1.0)'. A sidebar on the right provides 'INFORMATION' about the binder, such as its name, type, subtype, document number, creation and modification dates, version, and lifecycle.



# 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

**Veeva**

This page offers the most up to date information on Veeva Systems' service status. Please check this site to view the current status of the services listed below - the site is updated for incidents of service unavailability longer than 15 minutes. If you are experiencing an issue that is not listed, please submit a ticket in the [Customer Support Portal](#). For status of Salesforce PODs, visit [Salesforce Trust Site](#).

When you subscribe to notifications for your POD you will receive email notification of all downtime, including releases. The notification will include a link to our Release Notes for each release if it is related to a Veeva release.

**✔ All Systems Normal**  
Current status in effect for 0 days, 11 hours, 24 minutes, and 33 seconds.

✔ Normal    ⓘ Informational    ⚠ Service Degradation    ✖ Disruption    ⌚ Scheduled

	Mar 13	Mar 12	Mar 11	Mar 10	Mar 9	Mar 8	Mar 7	Mar 6	Mar 5	Mar 4
> Veeva CRM	✔	⌚	✔	✔	✔	✔	⌚	✔	✔	✔
> Veeva MultiChannel & Integrations	✔	⌚	✔	✔	ⓘ	✔	✔	✔	✔	✔
> Veeva Align	✔	✔	✔	✔	✔	⌚	✔	✔	⌚	ⓘ
> Veeva Network	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
> Veeva Vault	✔	✔	✔	✔	✔	ⓘ	⌚	✔	✔	✔
> WeChat	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔





# 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

The screenshot shows the 'Login Audit History' page in the Vault PromoMats interface. The page includes a navigation menu with 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The 'Login Audit History' section is active, displaying a table of audit events. The table has columns for Timestamp, User Name, Source IP, Type, Status, Browser, Platform, and Vault ID. The Vault ID column is highlighted with a blue box. The table shows 11 results for the date range 03/10/2019 to 04/10/2019.

Timestamp (dd/MM/yyyy)	User Name	Source IP	Type	Status	Browser	Platform	Vault ID
04/10/2019 08:36 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
04/10/2019 07:05 GMT	csmpm@eusc.com	109.152.192.234	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 21:40 GMT	vaanmats@eusc.com	88.184.90.246	User Login	Invalid Password	Unknown	Unknown	
03/10/2019 20:10 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:15 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:17 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 20:12 GMT	linda.toum@eusc.com	88.152.232.97	User Login	Invalid Password	Chrome 77.0.3865.90	Windows NT 10.0	
03/10/2019 18:06 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 13:47 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601
03/10/2019 11:51 GMT	vaanmats@eusc.com	88.175.181.234	User Login	Invalid Password	Chrome 77.0.3865.90	Intel Mac OS X 10.14.5	
03/10/2019 11:20 GMT	csmpm@eusc.com	109.153.13.238	Vault Authentication	Success	Chrome 77.0.3865.90	Windows NT 10.0	34601





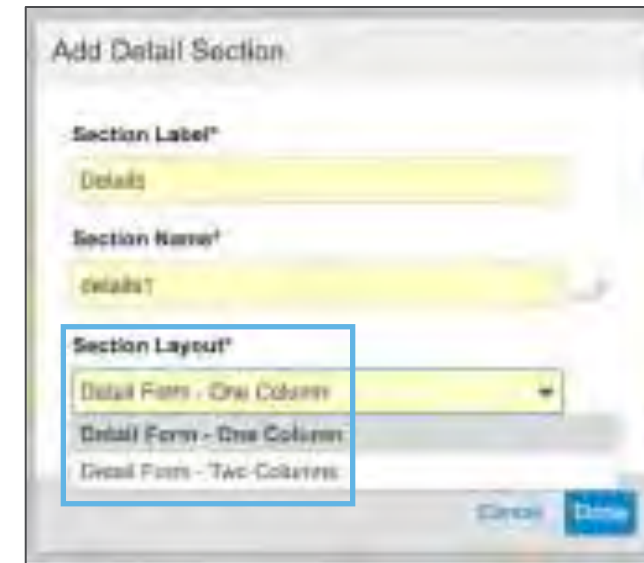
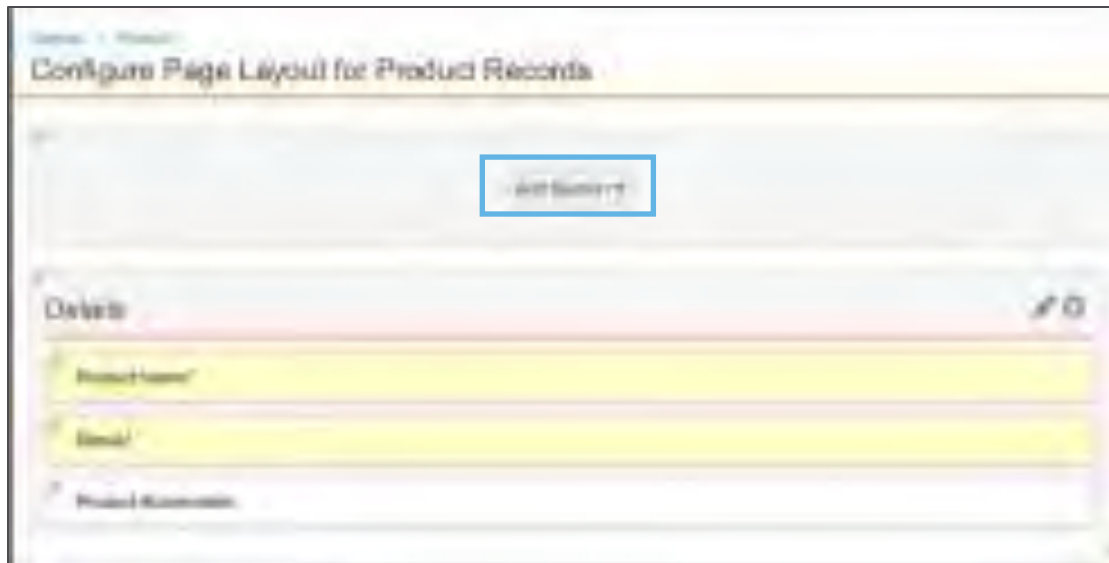
# UI Changes in Object Page Layout Editor

- 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

	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

Sandbox Vaults >  
New Sandbox

Details

Name kmdemo

Type Configuration

Release General

Domain Limited

Vault Owner  Current User





# 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

The screenshot shows a user record for 'Orville Mills' with an 'Integration Details' section. Two callout boxes are present: one pointing to the 'Global ID' field (value: 22435\_1513047) with the text 'Combination of the Vault ID and the object record's ID. Read-only', and another pointing to the 'Link' field with the text 'Default value is null. Used to store a value that identifies an object record across vaults. For example, an object record's global\_id\_\_sys field value'.

- 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

Start Options ?

Control 1 Participants

Participant Label\* Asset Request Approver

Add Participants\*  Use roles as participants  Use custom action to define participants

Custom Action\* [Dropdown]

Participants are determined based on custom logic specifying users and groups. These actions are created by your organization with the Vault Java SDK to meet your specific business needs. Talk to your Vault Administrator to learn more about these actions.

Workflow Timeline

Asset Request Review and Approval

System Started: 10/7/2019 11:13 AM EDT

Add Workflow Participants

Select users to add as workflow participants.

Asset Request Approver

CSM User [Dropdown]

Submit

DETAILS

Assess Asset Re

+ Add Participants

Cancel Workflow

SDK-Managed Participant groups are not available

- 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

**Start Options** ?

Control 1 Participants

Participant Label\* Asset Request Approver

Add Participants\*  Use roles as participants  Use custom action to define participants

Custom Action\* [Dropdown]

Requires Custom Vault Java SDK code

- 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)

Step 3: Set the options

Status

User must always enter a value (required)

Values must be unique

Display in default lists and hovercards

Do not copy this field in Copy Record

Encrypt Field Value

Feature Label in 19R2

Step 3: Set the options

Status

User must always enter a value (required)

Values must be unique

Display in default lists and hovercards

Do not copy this field in Copy Record

Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)

Feature Label in 19R3

- 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



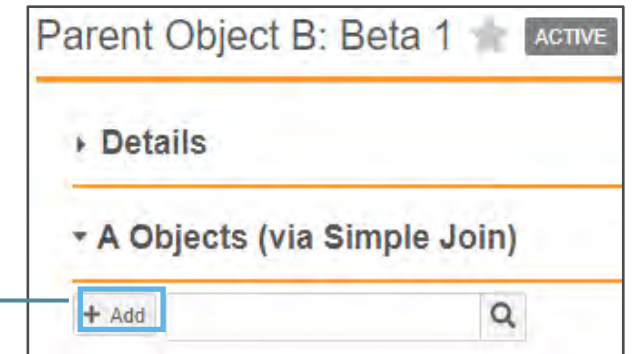
- Overview

- 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 became a Complex Join. A Complex Join Related Object Section shows a +Create button by default



As of 19R3, a Simple Join Related Object Section 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 Lifecycles

## Legal Hold Lifecycle

**Details**

Label: Legal Hold Lifecycle

Name: legal\_hold\_lifecycle\_\_v

Object: [View objects using lifecycle](#)

Status: Active

Source: Standard

Description

**State Types** [+ Create](#)

State Type	State	Description
<a href="#">Approved State</a>	Approved	
<a href="#">Complete State</a>		
<a href="#">Initial State</a>	Draft	
<a href="#">Pending State</a>	In Review	Applies to active states after the Initiate State and before the Completed State

**States** [+ Create](#)

State Label	State Name	Status	Description
Inactive	inactive_state__c	Active	
Draft	draft_state__c	Active	
In Review	in_review_state__c	Active	
Approved	approved_state__v	Active	
Lifted	lifted_state__v	Active	





# Object State Types

- Configuration

- Create Object State Type

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

Object State Types >  
Create State Type

Details

Label\* Pending State

Name\* pending\_state1

Scope\*  
Applies to all lifecycles  
Available to all lifecycles  
Specific lifecycle

State Required\*  Yes  No

Description Applies to active states after the Initiate State and before the Completed State

Source Custom

Status Active

A required state type must have an associated state in all lifecycles in which it appears. By default, Vault associates the Initial state with the required state type

- **Applies to all lifecycles:** ensures the state type appears in every object lifecycle, including pre-existing object lifecycles
- **Available to all lifecycles:** makes the state type appear as an option when creating a new state type association
- **Specific lifecycle:** state type only applies to a single object lifecycle



# Object State Types

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

Object Lifecycles >  
Legal Hold Lifecycle

---

**Details**

Label Legal Hold Lifecycle

Name legal\_hold\_lifecycle\_\_v

Object [View objects using lifecycle](#)

Status Active

Source ▾ Standard

Description

**State Types** + Create

State Type	State	Description
Approved State	Approved	
Complete State		
Initial State	Draft	

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

Object Lifecycles > Legal Hold Lifecycle >  
Create State Type Association

---

**Details**

State Type\* Pending State

State In Review

- Inactive
- Draft
- In Review
- Approved
- Lifted

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

<b><u>Global ID</u></b>	34820_858
<b><u>Global Version ID</u></b>	34820_858_1156
<b><u>Document Link</u></b>	
<b><u>Document Version Link</u></b>	

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

Annotate 1 of 1

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

Annotate 1 of 1

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](#)



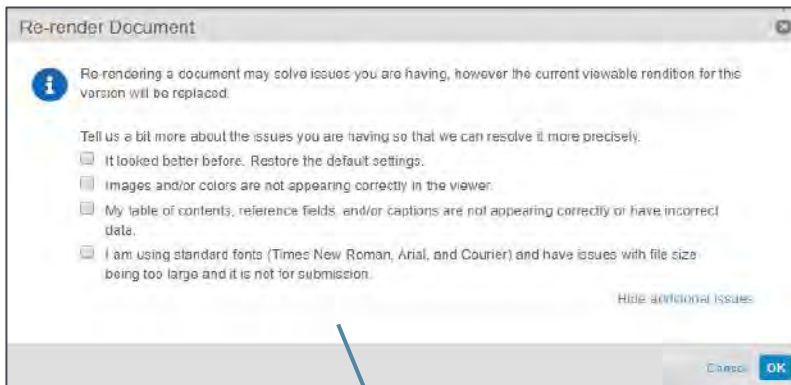
# Remove Deprecated Re-Render Options

- Overview

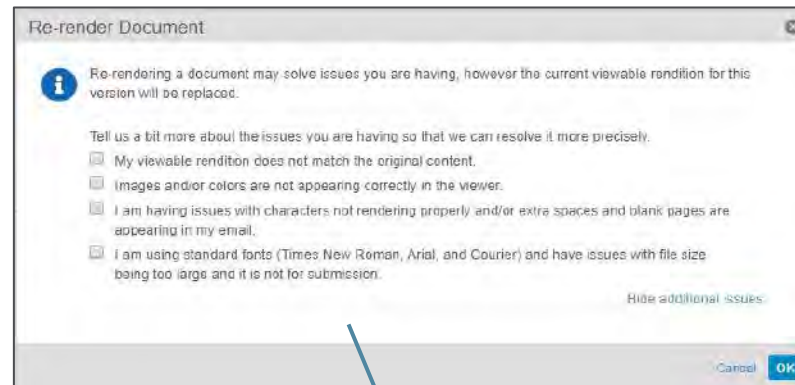
- Removes several re-render options that are no longer applicable
- Other options that control rendition settings remain available in the Re-render Document dialog and are shown below

- Impact

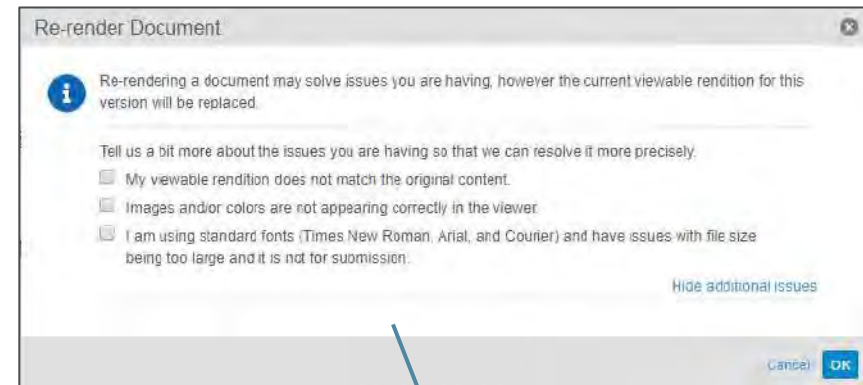
- Lays the groundwork for future enhancements and stops dependency on 3rd party rendering



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

