

# Veeva & U

Your Dedicated Commercial Innovation Hub



# Vault Annotations Best Practice

September 2020





## Webinar Housekeeping



Microphones will be **muted** throughout the webinar



Please use Q&A function to ask questions



Questions will be answered at the end of the presentation

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Manager, Customer Success  
Commercial Content, EU





**1** Why are annotations so important?

**2** Manual referencing

**3** Auto Claims Linking

**4** Annotations best practices

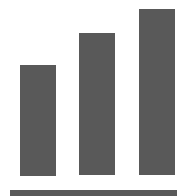
**5** Bring forward annotations



# Why Are Annotations Important?



Collaboration



Compliance



Speed



# Manual Referencing

## Claim

Tool to select the scientific evidence to backup a claim

## Granular

Always select the most granular possible (anchor as opposed to document)

## Create

Ensure create anchor functionality is enabled

## Duplication

Ensure Enablement of Duplicate detection functionality

## Governance

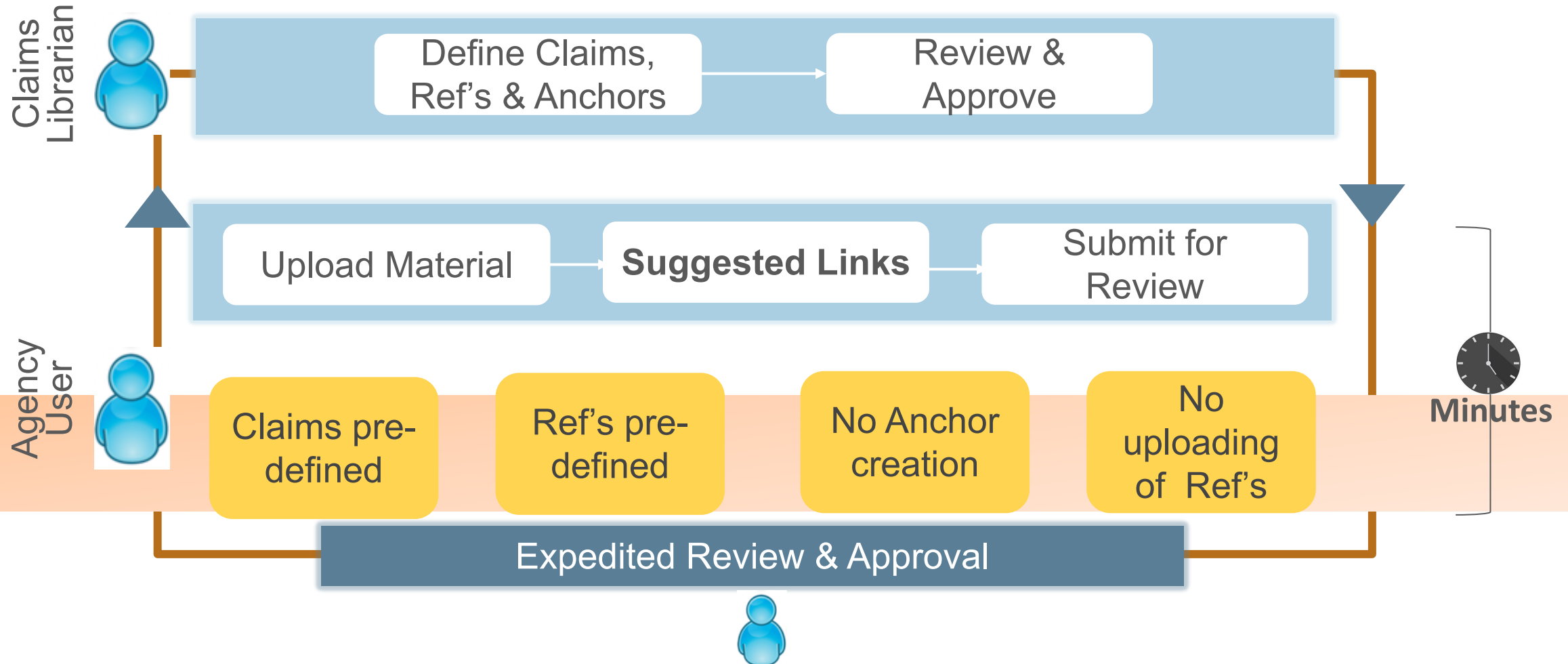
Labelling of references consistent

## Taxonomy

Ensure consistency of metadata and use of classification functionalities



# With Auto Claims Linking



**Minimal inspection of system-generated references based on pre-approved Claims**



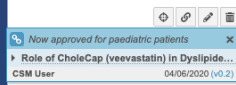


|                        |                             |             |        |       |               |         |
|------------------------|-----------------------------|-------------|--------|-------|---------------|---------|
| Using Text Annotations | Most amount of text (Links) | Revise Text | Filter | Reply | User Mentions | Resolve |
|------------------------|-----------------------------|-------------|--------|-------|---------------|---------|

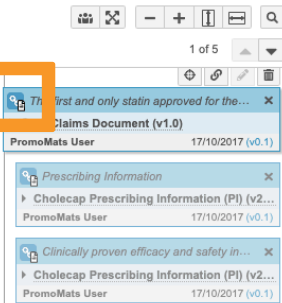
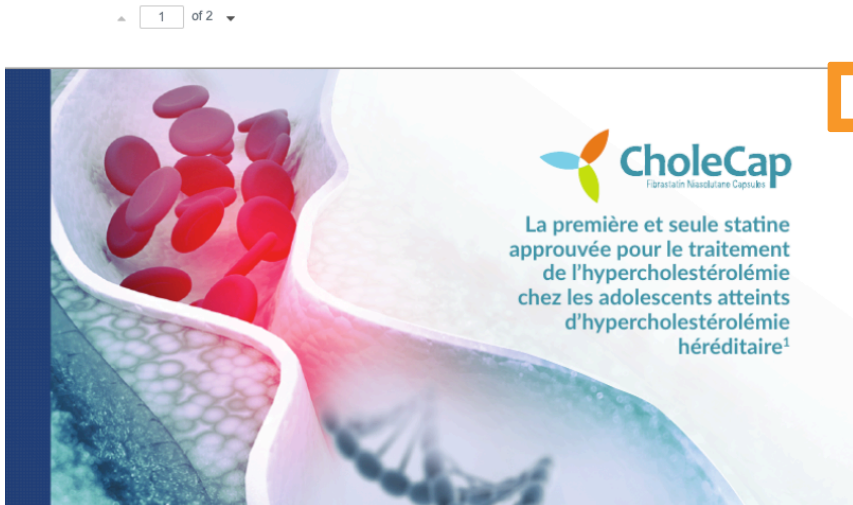
# Annotations Best Practices



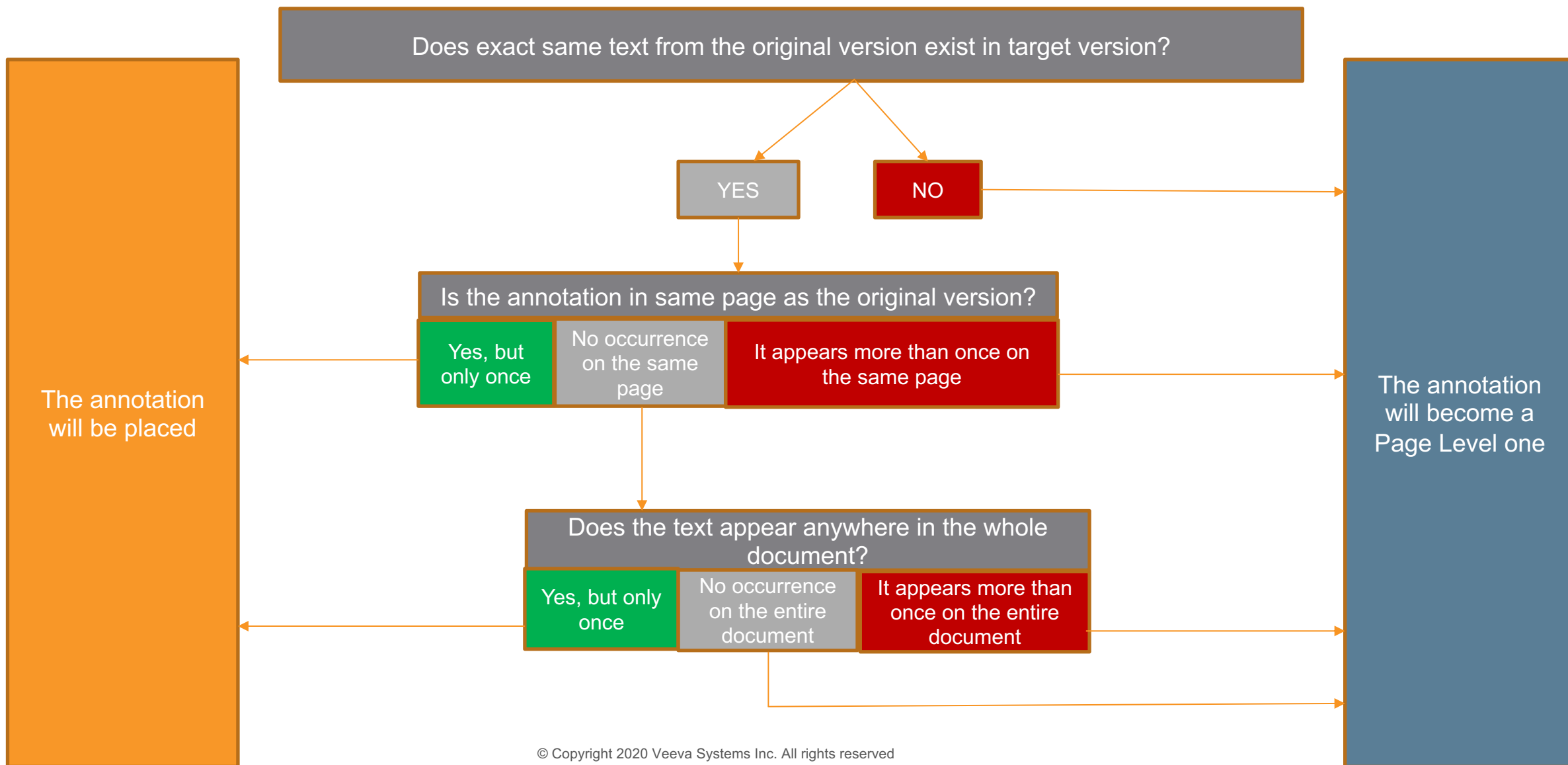
# Placement of text annotations when brought forward



Placed annotation



Page level annotation





### Bring Forward Annotations

Source version [?](#)

0.1 [↗](#)

#### Types to bring forward

- Lines (0)
- Links (4)
- Anchors (0)
- Notes (0)
- Restore placement of image annotations [?](#)

#### Advanced

- Do not bring forward duplicate link annotations [?](#)
- Do not bring forward page-level annotations [?](#)

#### Specify added/removed pages

##### Pages added in new version

Ex: 1, 3, 5-7

##### Pages removed from prior version

Ex: 1, 3, 5-7

Type of Annotations

Choose the right source version

Advanced Options



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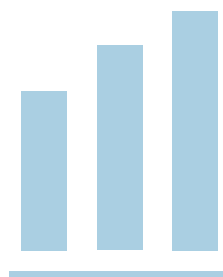
**5** Bring forward annotations



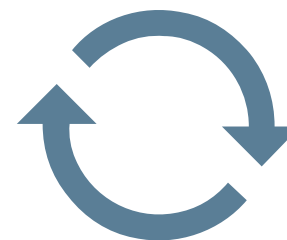
## What's in it for You?



Time & Quality



Learn  
something new



Continuous  
Improvement

Talk to your CSM for more info!

# Questions



Thank You

