



Vault 101 Training

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What You'll Learn Today

- **An Introduction to Vault**
- **Logging In**
- **Uploading/Finding Documents**
- **Managing Documents with Workflows**
- **Reports & Dashboards Basics**
- **Using Vault Help**



Today's Session

- **An interactive session where you can try Vault for yourself**
- **Use the search filters and see how they differ from folder navigation**
- **Get your questions answered about Vault capabilities**
- **Explore how processes could change with your business partners on Vault**



Introduction to Vault



The Consumer Web Works for Consumers...



...who then go to work, and get tortured by technology

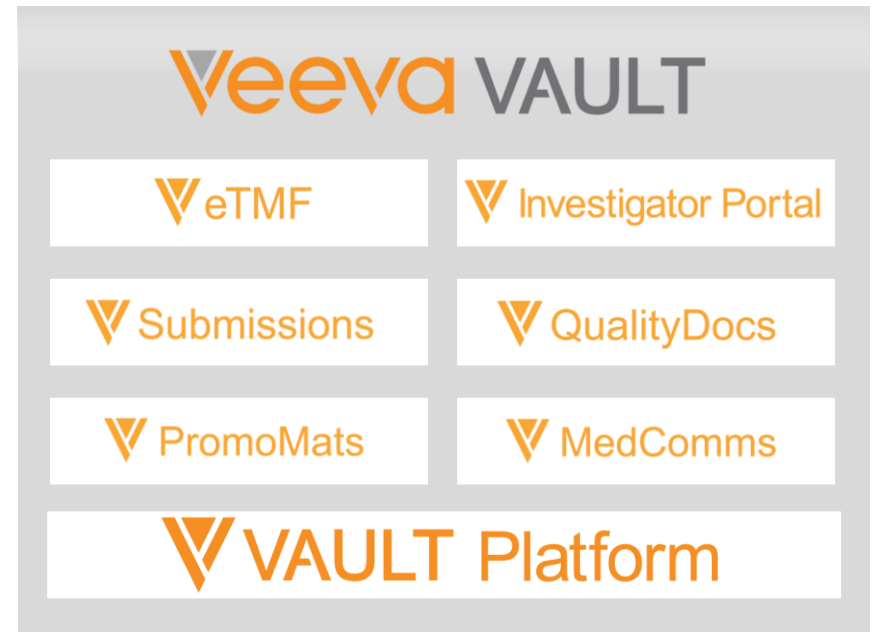
Veeva Vault

Regulated content management platform and applications built for life sciences

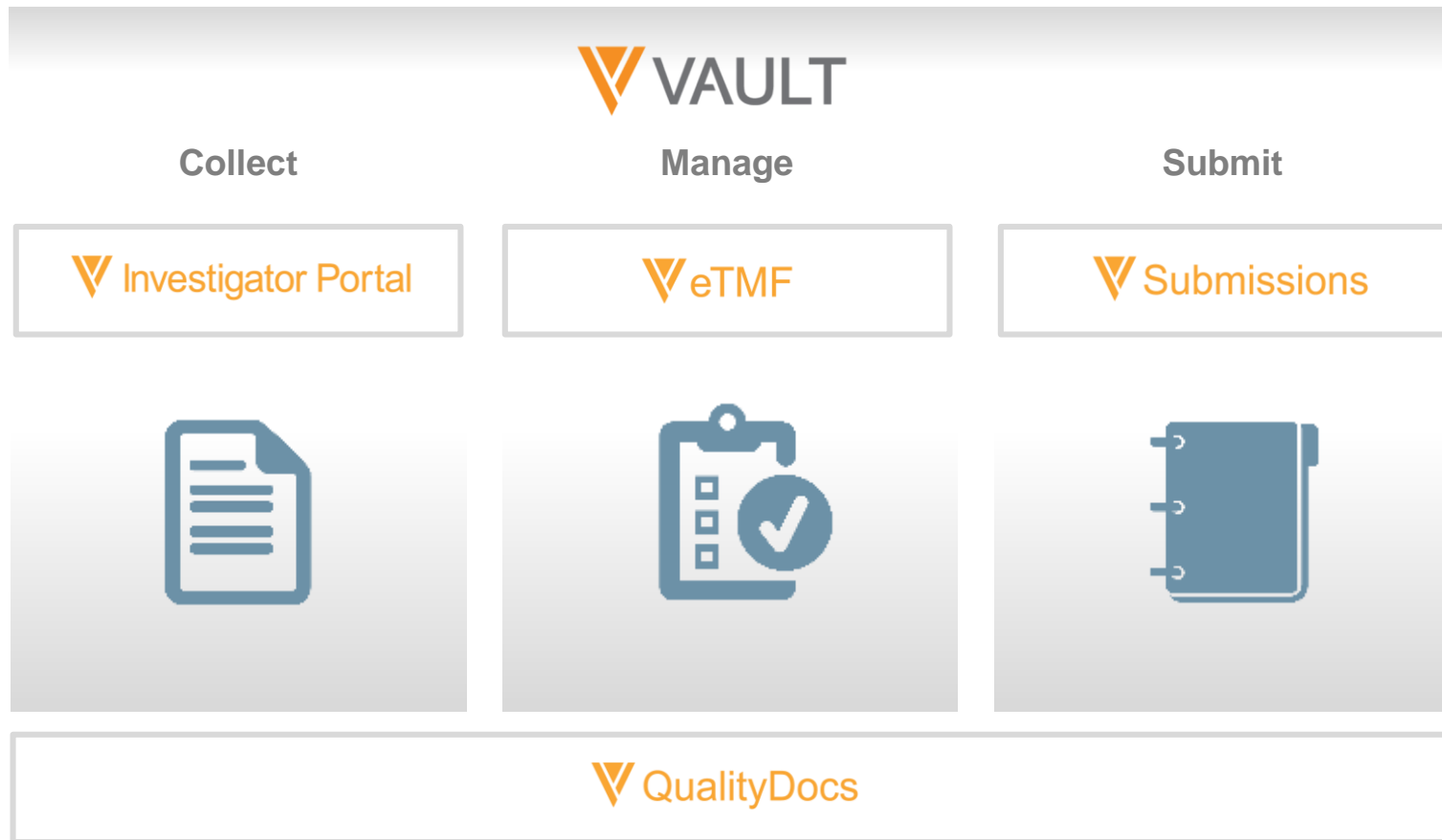
Consumer-web ease-of-use

Cloud pace of innovation

IQ/OQ validated, PQ ready



Veeva Development Suite



Lesson 1: Logging In

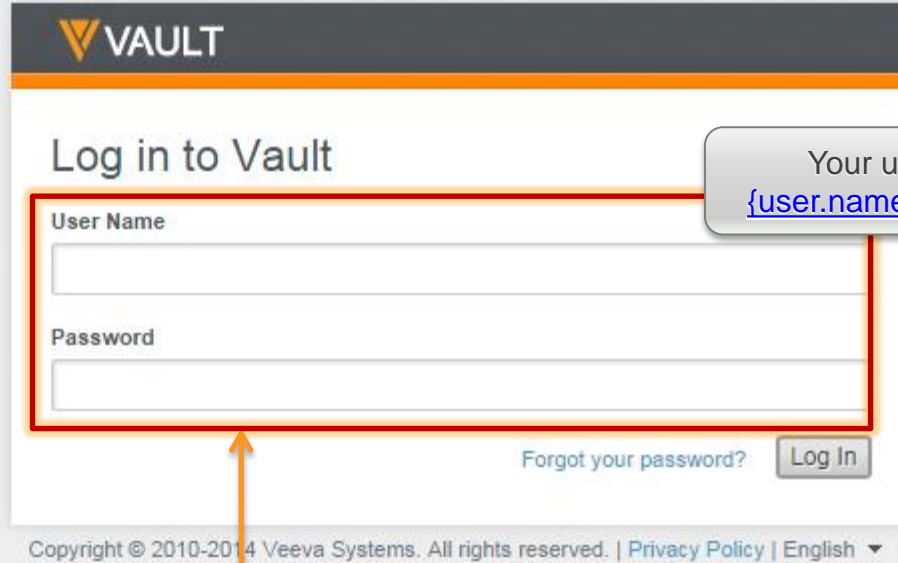
Logging in to Vault

Orientation to the Interface

A decorative graphic consisting of several overlapping, rounded, light-orange shapes that resemble stylized clouds or waves, positioned in the bottom right corner of the slide.

Logging In to Vault

 <https://login.veevavault.com/auth/login> ← Login URL = https://login.veevavault.com



VAULT

Log in to Vault

User Name [Your user name should be {user.name}@{ADDVAULTID}.com](#)

Password

[Forgot your password?](#)

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Enter your Vault user name and password



Exercise: Logging In

- **Log in to the system**
- **View the home page**
 - My tasks
 - Available tasks
 - Notifications
- **View the library**
- **View a document**



Lesson 2: Uploading & Finding Documents

Understanding Documents

Uploading Content

Finding Content

Understanding Documents

- **Document** — a generic term used to describe any content within a document management system
- **Document types** — identify the content based on the subject and function of the document
 - Example: Principal Investigator CV, Protocol, SOP



What Makes up a Document



Uploading Content

The screenshot shows the VAULT PromoMats interface. The top navigation bar includes 'HOME', 'LIBRARY', 'REPORTS', and 'DASHBOARDS'. The 'Create' and 'Upload' buttons are highlighted with a red box. Below the navigation bar, there is a search bar and a 'Sort by' dropdown menu set to 'Modified Date (Newest First)'. The main content area displays 'All Documents'. An 'Upload Files' dialog box is open, featuring a large dashed blue box for file upload with the text 'Drag and drop files to upload here'. Below this is a 'Choose' button. The dialog also has two radio buttons: 'Classify documents later' (unselected) and 'Classify documents now' (selected). Underneath, there is a 'Choose document type' section with three dropdown menus labeled 'Type*', 'Subtype:', and 'Classification:'. At the bottom of the dialog are 'Next' and 'Cancel' buttons.

Click on Upload to start uploading your document with the help of a 'wizard'.

Drag and drop to add a document or browse your folders to find it.

Select the type, subtype, and classification. As an admin, you can define these in your Vault.



Exercise: Uploading / Finding Content

■ Add content to Vault

- Upload new document
- Create document from template
- Populate document fields
- Download the source document
- Download the viewable rendition
- Check in / check out

■ Locate document

- Navigate library
- Using search
- Filters
- Add favorites



Lesson 3: Managing Documents With Workflows

Reviewing a Document

Using Annotations


Comparing Versions

Approving a Document w/ 21 CFR
Part 11 Compliant e-signature


What Is a Workflow?


- Workflows define a set of tasks assigned to users
- Task recipients need to perform a specific action (e.g., review this document)
- Assigned tasks are displayed in your Vault task list, and notifications are sent via email

The screenshot shows a user interface for a task management system. On the left, a sidebar displays the user's name 'Approver1 Test' with a profile icon, and a summary of tasks: 'My Tasks' (1) and 'Available Tasks' (0). The main area is titled 'My Tasks' and includes a 'Sort by' dropdown menu set to 'Date Received'. A task notification is shown with a warning icon, indicating an approval for 'MFG Operations doc drug product (v0.1)' due on Tuesday, October 8. The task owner is identified as Heather McHugh, and a message states that the product has been sent for approval.

WELCOME APPROVER1	
 Approver1 Test	
My Tasks	1
Available Tasks	0

My Tasks Sort by

 Approval for MFG-OPS-00002: MFG Operations doc drug product (v0.1) about a minute ago
Due: Tuesday, October 8
[Show less](#)

 Workflow Owner
Heather McHugh
MFG Operations doc drug product (v0.1) has been sent for your approval.



Relationship of Lifecycles & Workflows

SAMPLE WORKFLOW



Lifecycle

- Lifecycle states are stopping points for your documents in their workflow
- Lifecycles provide clear status for where your document is in the overall process
- Lifecycle states drive special actions in your workflow:
 - Security changes
 - Setting of dates
 - Changing cycle counts

Workflows

- Workflows define the process that the document takes to get between lifecycle states
- Workflows define the tasks necessary to move the document forward
- Workflows typically consist of multiple tasks between lifecycles

Review and Approval Workflows

- The owner sends a document for review and/or approval
- Review is typically used for informal feedback, annotations
- Approval is used to formally approve a document with e-signature
- Workflow participants, task instructions, and due dates can be specified when starting a workflow

The image shows a software interface for document management. On the left, a 'MANAGE' menu is open, with 'Send for Review' highlighted in a red box. Below the menu, a 'Review' dialog box is displayed. The dialog box contains the following text and fields:

Review

You are about to start a review workflow for "This is my Test Document". Please complete the following fields to begin the workflow.

Reviewer(s)* Every User Any User

Start typing to see a list of users...

[Add task instructions](#)

Due Date*

mm/dd/yyyy

*Required to proceed

Exercise: Review/Approve a Document

■ Reviewing a document

- Send document for review
- Complete the review task by:
 - Comparing versions
 - Adding/responding to annotations
 - Completing the task

■ Approving a document

- Send document for approval
- Complete the approval task by providing your e-signature



Lesson 4: Reports & Dashboards Basics

Overview of Reports & Dashboards

Creating a Report

Creating a Dashboard

What Are Reports and Dashboards?

- **Reports provide a way to answer business questions about your processes in vault:**
 - Gather relevant data and construct a visual representation for review
 - Highlight:
 - Which documents need attention
 - Which state of processing documents may be in
 - Historical insights of past reviews, approvals, and much more
- **Dashboards provide an at-a-glance view of reports**
- **Organize, analyze, and share this data in Vault with any authorized user**



Types of Reports and Format

- **Document**

- Reports on documents leveraging fields and document metadata (e.g., document status, expiration date, type/subtype/classification, etc.)

- **Workflow**

- Report on workflow and/or task information (e.g., performance metrics, completion dates, etc.)

- **Report format**

- Tabular
 - Shows properties in columns and individual records in rows
- Matrix
 - Shows properties in both columns and rows, and performs summary calculations in the cells



Exercise: Creating Reports & Dashboards

- **Learning about reports**
 - Create a report
 - Matrix, workflow, or document
 - Share a report
- **Learning about dashboards**
 - Create a dashboard
 - Share a dashboard



Lesson 5: Using Vault Help



Vault Help Page

VAULT PromoMats Search Vault db Q Veeva Internal Jason McCloy

HOME LIBRARY REPORTS DASHBOARDS + Add Content

Jason McCloy
jason.mccloy@vvtraining.com

Help & Support

Help Documentation

Welcome to Vault Help. Learn how to get started with Vault and read details about specific features.

- User Help
 - Vault Basics & Navigation
 - Working with Documents & Binders
 - Reporting
 - Lifecycles & Workflows
 - Security & Permissions
 - Managing Your Settings
 - PromoMats Application
- Admin Help
 - Admin Basics
 - Users & Groups
 - Documents
 - Fields
 - Lifecycles & Workflows
 - Document Security & User Permissions
 - Authentication & Vault Security
 - System Settings

Release Notes

Learn about the latest new features.

- Read Release Notes

Vault Customer Support Portal

Vault Admins
If you are a Vault Administrator for your organization, [log in to the Vault Customer Support Portal](#) to submit a case.

Not a Vault Administrator?
Contact your organization's Vault Administrator, who can work directly with Vault Customer Support on your behalf.

Share Product Feedback *New!*

Submit a product enhancement idea or vote on ideas submitted by others. You can also ask a question, or even give praise for things you like. You'll hear back from customer support, product management, and other community members.

Help
Log out

Vault Online Help Files

- **Veeva Vault includes access to help documentation**
 - Provides written details about specific features, as well recorded sessions
 - Describes the latest features in visual, easy-to-read, release notes

Reporting Overview

Vault reports make it easy to answer important business questions about your vault. You can use reports to organize, analyze, and share any data related to your documents and processes.

The logo for Veeva VAULT, with 'veeva' in orange and 'VAULT' in grey.

Report Basics

June 28, 2013



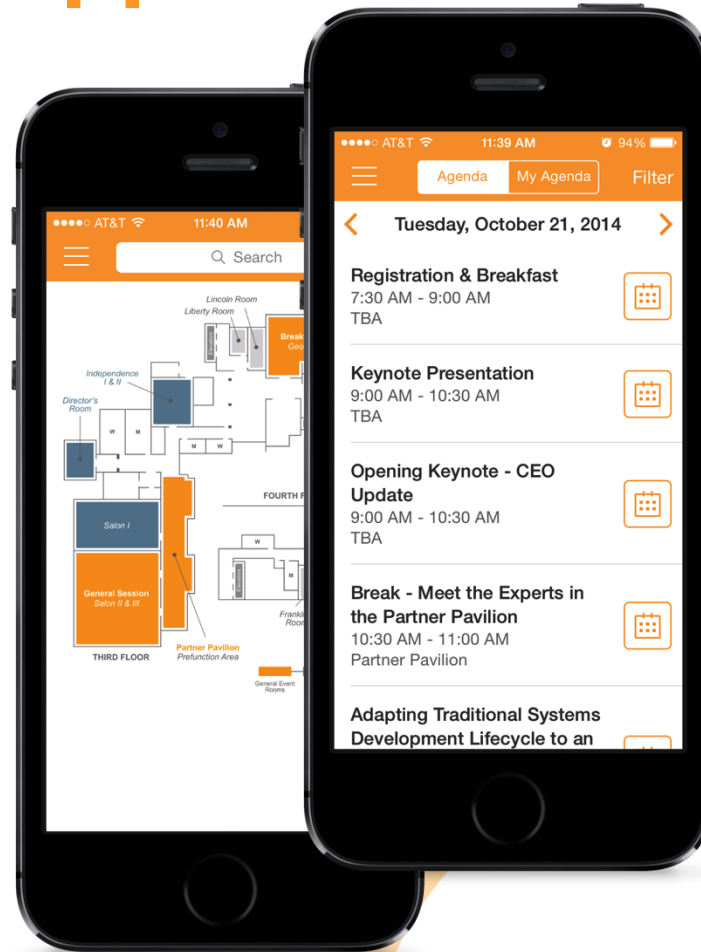


Questions

Complete the session survey with the Veeva app

Thank you

Search "Veeva" in app store
Password: rdsummit





Thank You

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