Vault PromoMats

ADDING CONTENT TO PLACEHOLDER

How to upload content into a Document Placeholder:
1. Locate and open the document in the Task tab
2. Click Upload file and then select Choose to browse for the file(s)
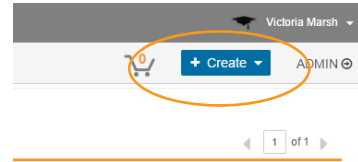3. Click OK

CREATE LINK ANNOTATIONS

From within the document:
1. Click 'Annotations' button and then select the 'Link icon'🔗
2. Move the cursor (with a little link icon image), to the first paragraph that needs referencing and highlight the text or image working from top left to bottom right
   (The system will detect the highlighted area either as text (in which case the text highlighted will appear in the annotation title) or as an image (where it will state 'image annotation' in the title))
3. The pop-up page Select Anchors will appear. Type in the Name, Author or Title into the search field to locate the Document. *To narrow search consider adding filters (E.g. Product) or by clicking on 'All documents' on the right hand side and selecting favourites, recent documents etc.*
4. Select or create an anchor ⚓
   a) To select an existing anchor *(if annotation already created)*
      i. Click on the green circle with white cross icon ➕
      ii. The circle will turn red ⛔
      iii. Click 'Close' at bottom of pop up page
   b) To create a new anchor
      i. Click Select or create new Anchor in this Document, which will open the document
      ii. Repeat point 2 (from create link annotations)
      iii. Add anchor name
      iv. Click Save
      v. Click Close at bottom of pop up page

ADDING A REFERENCE TO THE LIBRARY

Some agency individuals may have security permission to create new documents, such as references.
If you have this permission, you will see the blue Create button in the navigation bar underneath your name

NB: Before uploading, check that the document does not already exist in the library.
To upload a reference document:
1. Click the blue Create button from Tasks or Library, select Upload
2. Drag and Drop document files into the space provided from desktop, or select 'Choose' to browse for the file(s) on your computer
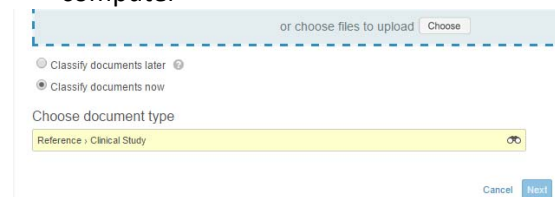
3. Select radio button Classify Documents now
4. Select Document Type from list using search binoculars E.g. Reference › Clinical Study
5. Click Next
6. Complete the Document field metadata Highlighted fields must be completed
   <u>Please note:</u> *Field names and usage may vary between Clients. Please refer to Client Guidance regarding completion of the metadata fields*
7. Click 'Save' at top of Document field area
8. Click the Action menu (gear icon) ⚙▾ and select from options available
Action menu selection will vary by Client. Options may include an immediate Approval for Use or the document may require authorization before it can be used.

TASK COMPLETION

When your task is completed, dependent upon your Client's configuration, you will either be required to:
1. Click the Complete button, OR
2. Select next action from Actions menu ⚙▾

REVIEWING ANNOTATIONS

1. Locate document returned for amends/re-upload in Task tab
2. From Actions Menu ⚙▾ , within document, select Export annotations and save local copy. Review all note annotations
3. Brief corrections to creative team
4. Check that list of corrections have been made to updated Document <u>before</u> uploading new version
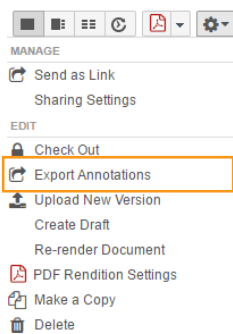
UPLOAD NEW VERSION OF DOCUMENT

Click the Actions Menu ⚙▾ from within the document

1. Select Upload new version, which will bring up a pop up page
2. Select Choose and browse for the updated file(s) on your computer
3. Click Save
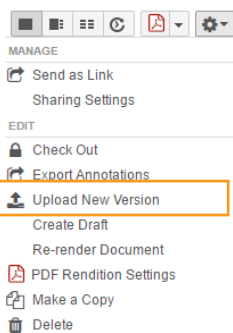
BRING FORWARD ANNOTATIONS

From within the Document (after Upload of new source file):

1. Click Annotations and then select the Bring forward annotations icon, 🗗 a pop up page will appear
2. Select the source file (use the View selected version feature if required)
3. Select the type(s) of annotation you wish to bring forward (link, links or notes)
4. Click Continue

REPLY AND/OR RESOLVE ANNOTATIONS

From within the Document with annotation notes showing in view:

1. Click on the note annotation
2. Click Reply and type in confirmation of changes made
3. Click Resolve if applicable
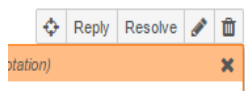
NB: By replying before resolving, it is clear in the audit trail that each annotation has been noted by the agency and responded to.
If you cannot resolve the request satisfactorily, click Reply and explain reason – leaving the annotation visible. If the Client accepts the reason, this annotation can then be resolved.

REPLACING ANNOTATIONS

When new version of the document is uploaded, brought forward annotations will re-link unless there have been changes to the content they link to.

The following steps explain how to re-link an anchor to the text or image it refers to.

From within the document (with annotation notes showing in selected view):

1. Click the annotation you wish to re-link
2. Click on the blue hyperlink version number in the grey line at bottom of the annotation
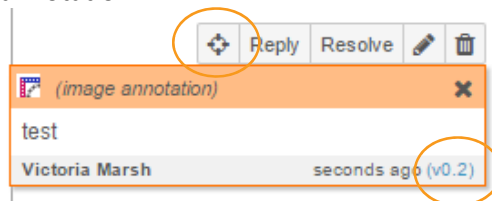
The hyperlink will open a pop up page, showing where the annotation was linked to content in the previous version

3. On the annotation, click the Move annotation (target icon) ✛ , use the highlight tool [*that appears when hovering over the document*], to re-select the image or text
4. When satisfied, click the grey tick mark underneath the highlighted text or image, to confirm the moved annotation placement
5. *When you click on the annotation now – the red hotspot area will show the replaced link. (if not – check your notes filter set up!)*

FILTERING ANNOTATIONS
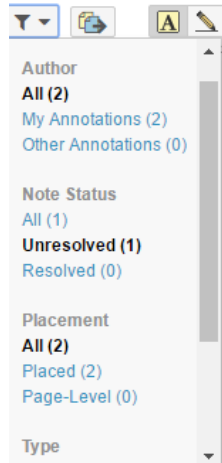
From within the document:
1. Click Annotations and then select the Filter icon
   A pop up page will appear
2. Select filter option(s) required (Author, note status, placement and type)

Filter options are a great tool, to confirm that all note annotations have been addressed and resolved (where applicable), and that all clinical references are re-linked against the corresponding claim, ready for review.

Top tip: If filter unplaced or unresolved is selected, when these annotations are resolved or placed, they will then disappear from view, due to filter settings. Click All to display all annotations.)

DOWNLOADING A DOCUMENT

From Library/Tasks (by hovering over Document name) or within Document:
1. Click on the Download Options icon (this is located next to the Action menu)
2. Select from Source document, and rendition types

(Note: If you wish to annotate offline and then import your version at a future date, you should use Export Annotations. See REVIEWING ANNOTATIONS.)
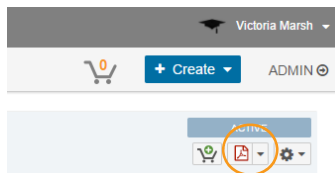
WHERE USED?

This feature shows you relationship links between documents, E.g. how many documents have cited a particular reference document or Core claims document. Where Used, creates a report which can be exported to Excel or CSV. The columns of the report can also be edited.

To use the 'Where used?' feature:
Locate the document, E.g. Core claim document
1. Select Actions Menu and scroll to the VIEW section of the menu options
2. Select Where Used
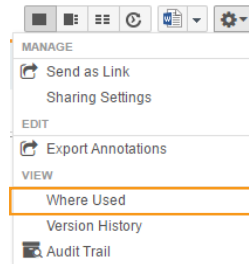
MEETINGS VIEW

Meetings mode is a view that enables you to view both the Document and the notes area simultaneously.

From this view you can also filter notes by groups such as date or tag type or you can filter by type, E.g. Notes on text, images etc.

This feature is useful for both meetings with Clients as well as internal agency review meetings
Meetings view is located in the document navigation bar.
To exit meeting mode, click full screen icon next to it.
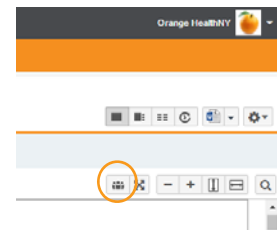
SEND AS LINK

The Send as Link option sends an email and Vault notification to the selected users which includes a hyperlink to the current version of the document or binder.

To send a link (email) from the document:
1. Select Actions menu within a document or binder. A pop up page opens
2. Complete fields on pop up page
3. When you have completed the pop up page, click Send

Links sent to new collaborators or non-Vault users, will be added as recipients in Sharing Settings