Veeva Commercial Vault 20R1 Deep Dive

MedComms 20R1

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Agenda

Auto-On Features

Configurable Features

Admin Features

Announcements

Release Kit

- The 20R1 Commercial Vault Release Kit is available
  - Tips to apply 20R1 features to your business processes
  - A comprehensive FAQ
  - The key highlights include:
    - Enhanced Medical Inquiry Email Capabilities
    - Changes to the User Interface – Single Create Button across all tabs
      - Video and Quick Reference Cards are available
    - Collaborative Authoring enhancements
    - Changes to multi-document workflows
    - Excel Templates for Reporting
    - New iOS Native Resolution capability for Scientific Engagement CLM Content

Deep Dive Surgery

Please join us for a Q&A Deep Dive Surgery on Friday

- Change to the normal Deep Dive Webinar
- Please use the Q&A Session planned for Tuesday March 31st to ask questions

Veeva

SUMMIT

Commercial & Medical Summit, North America

Philadelphia Convention Center | June 8-10, 2020

Make professional connections

Expand your knowledge

Get practical advice

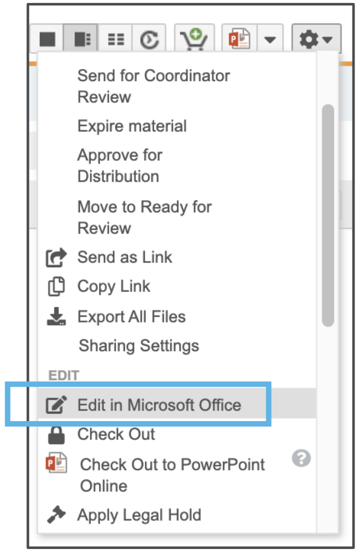
Drive positive change

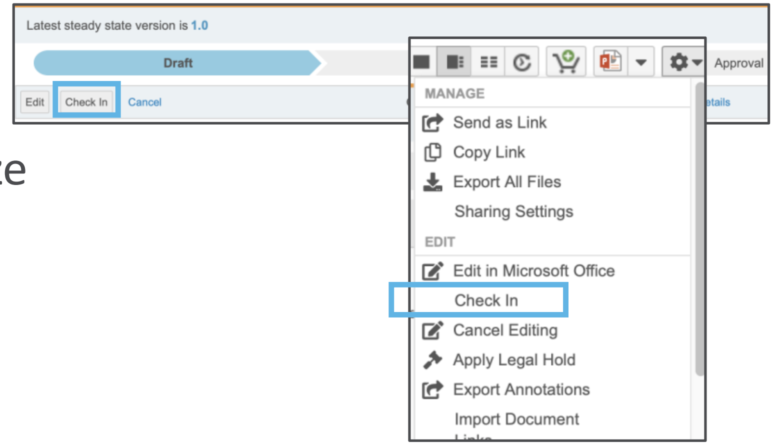
Register Now!

Auto-on Features

Collaborative Authoring Usability Enhancements & Microsoft Office 365 PowerPoint and Excel Support

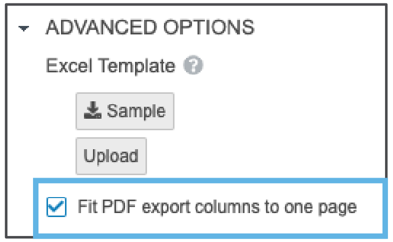
- Overview
  - Collaborative Authoring now supports checking out and editing Microsoft PowerPoint (.pptx) and Excel (.xlsx) files in addition to Word (.docx) files
  - The number of clicks required to check-out or edit a document from Vault has been reduced
  - A new option ‘Edit in Microsoft Office’ is available in the Action menu, which checks out the document and starts a collaborative authoring session
    - If the document is already checked out for Collaborative Authoring, this option opens the Microsoft Office editing view
  - You can now Check-in from the the Document Action menu as well as from the banner
- Considerations
  - You must have Edit Document permissions for a document to utilize Collaborative Authoring
- Learn more about Collaborative Authoring

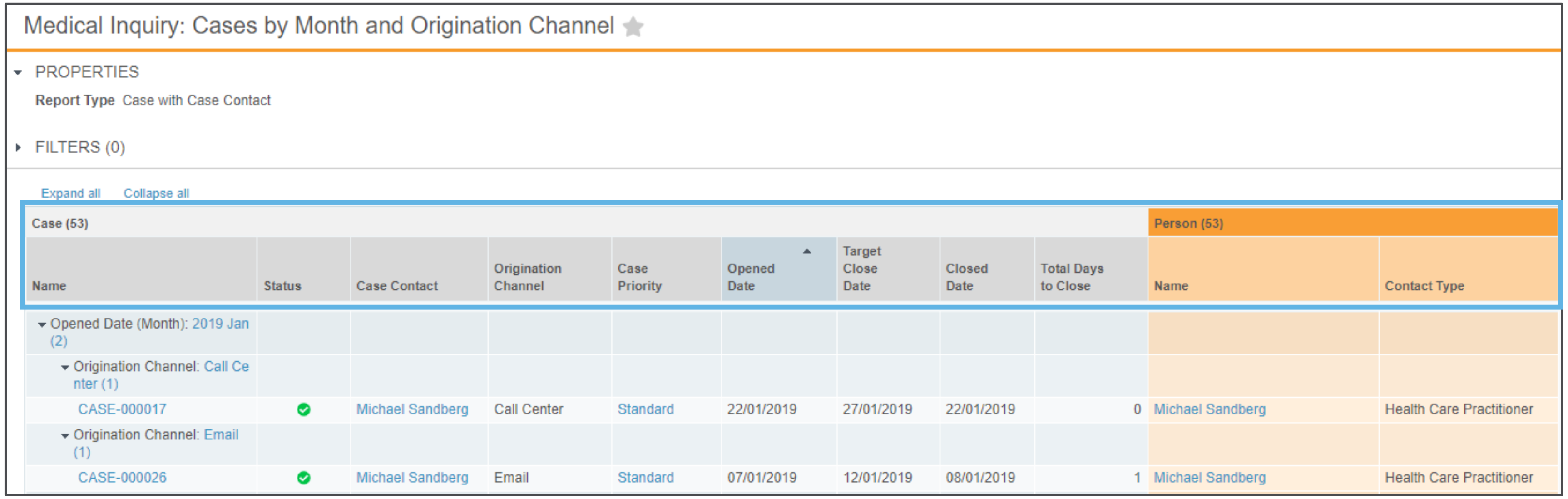




Define PDF Export Option in Reports

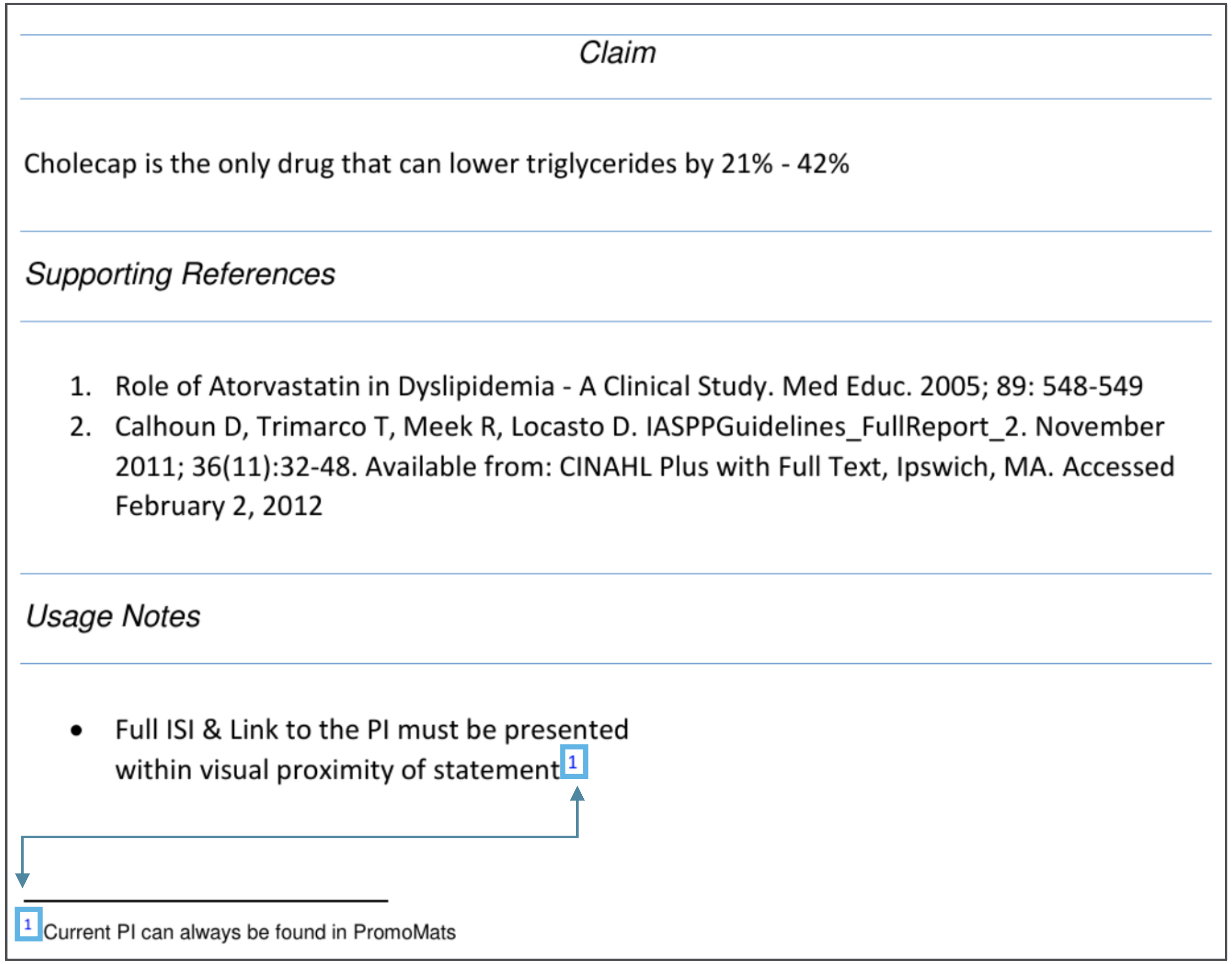
- Overview
  - Gives users the ability to define how columns fit on a page in a PDF export
  - Saves time by ensuring the columns will fit on one page in a PDF export right from Vault, rather than editing columns in Excel after the export
- Considerations
  - In the report screen, under Advanced Options, 'Fit PDF export columns to one page' is checked by default
  - The report will keep shrinking the font to keep all your selected columns on one page





Footnote & Endnote Linking in PDF Renditions of MS Word Files

- Overview
  - This enhancement adds support for clickable cross-reference links for footnotes and endnotes in Microsoft Word™ files in Vault viewable renditions
- Considerations
  - This support is in addition to the other types of internal links (hyperlinks, ToC links) and embedded web links that are already supported
  - The footnote link will route to the first use of the footnote in the document



Claim

Cholecap is the only drug that can lower triglycerides by 21% - 42%

Supporting References

1. Role of Atorvastatin in Dyslipidemia - A Clinical Study. Med Educ. 2005; 89: 548-549
2. Calhoun D, Trimarco T, Meek R, Locasto D. IASPPGuidelines_FullReport_2. November 2011; 36(11):32-48. Available from: CINAHL Plus with Full Text, Ipswich, MA. Accessed February 2, 2012

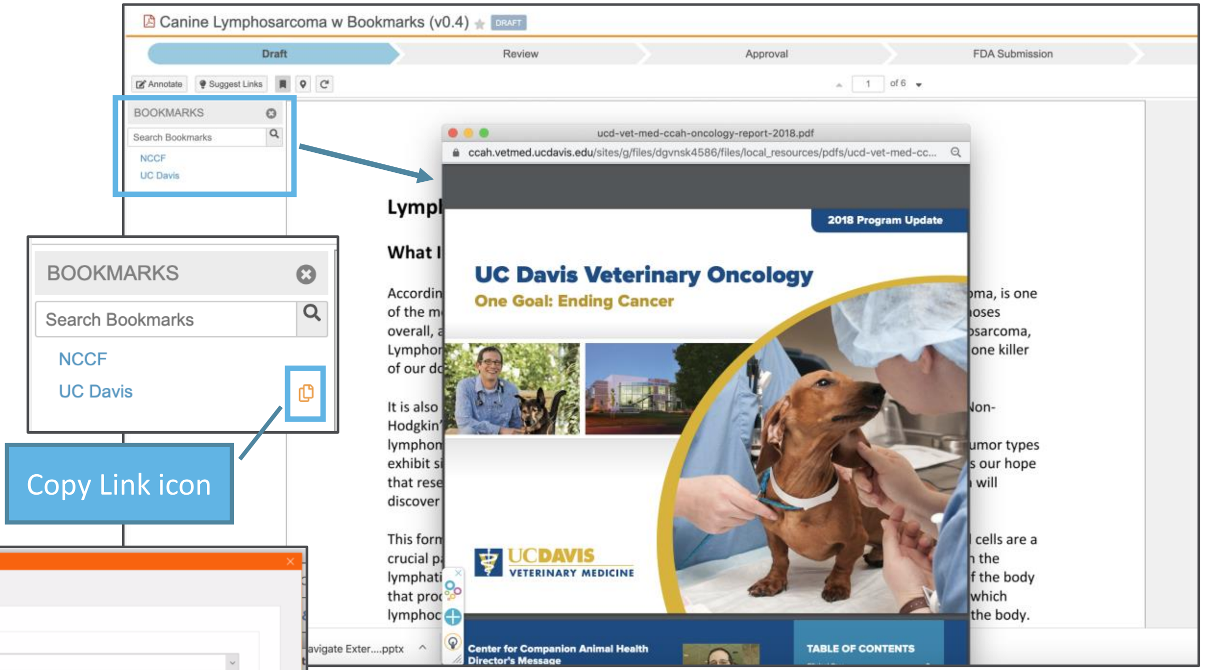
Usage Notes

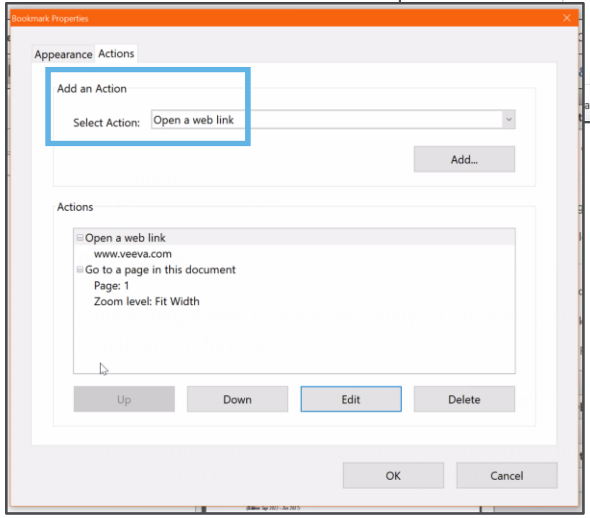
- Full ISI & Link to the PI must be presented within visual proximity of statement[1]

[1] Current PI can always be found in PromoMats

Navigate External Bookmarks

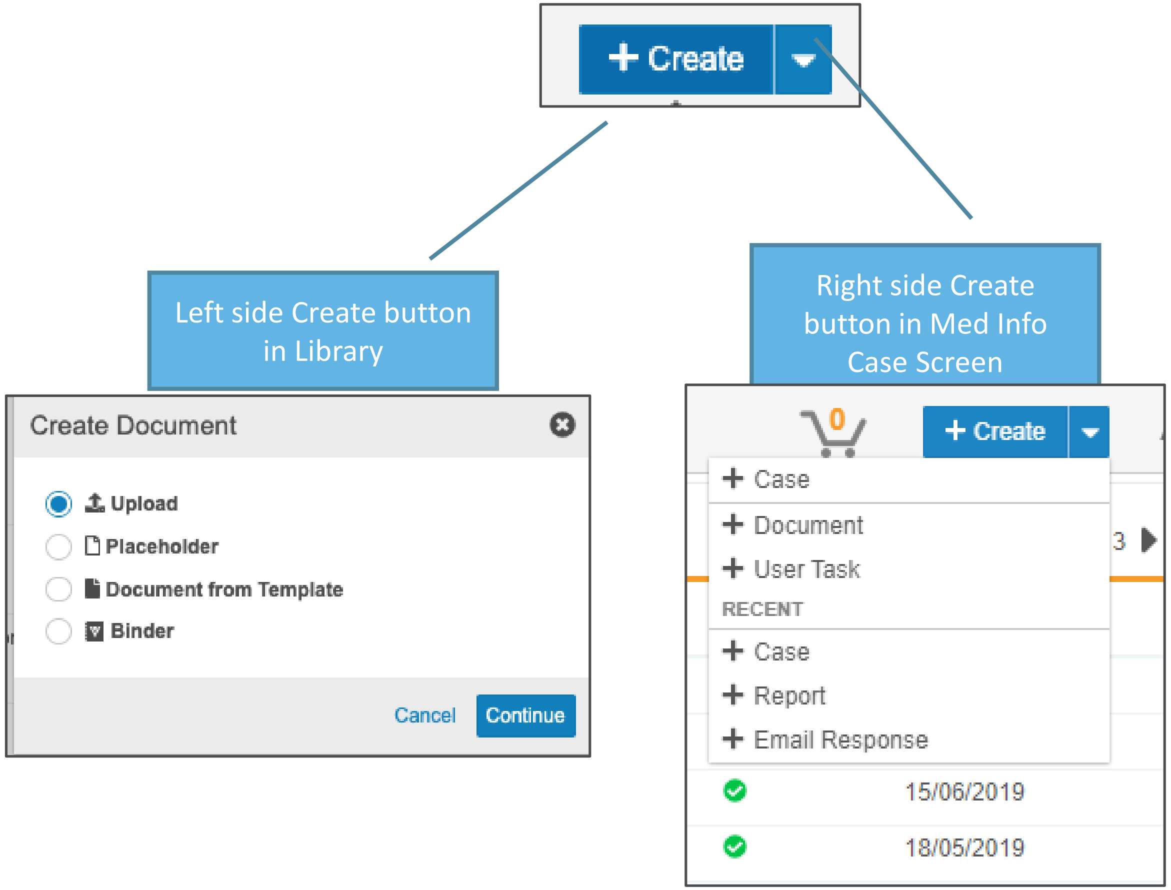
- Overview
  - PDF Bookmarks that link to external websites are now supported
  - When users click on a bookmark, the URL opens in a new mini browser window
- Considerations
  - Users can copy the URL to their clipboard by clicking the Copy Link icon
  - PDF Bookmarks must be created as an ‘Open Web Link’ action in Acrobat
    - If multiple actions are associated with a bookmark, Vault enables navigation based on the first supported action





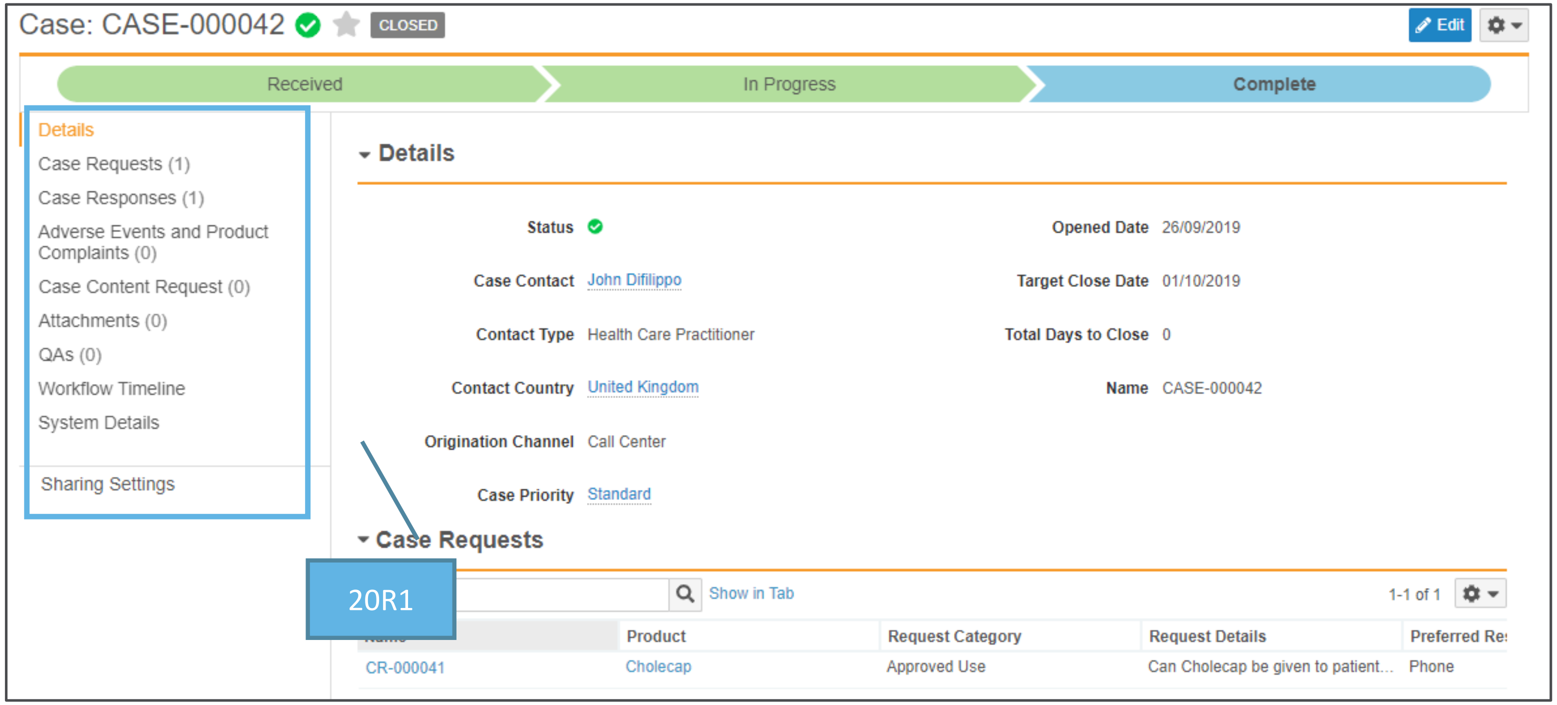
Single Create Button Across All Tabs

- Overview
  - Vault now supports a single, global Create button for all tabs
    - Users can create object records, documents, reports and dashboards all from this unified, global Create button
    - The new global Create button has two sides, the left side is contextual (based on the user's current context) and the right side is a drop down and shows up to the 3 most recently created item types (for the current user)
- Considerations
  - Vault will no longer show individual inline Create buttons within each object, report or dashboard tab
  - The Admin interface remains the same
  - The Create button will not be visible for Read-only license and Read-only security profile
  - External users will see the Create button and the actions they can perform will be dependent on their permissions
- Learn more about the [Create Button]



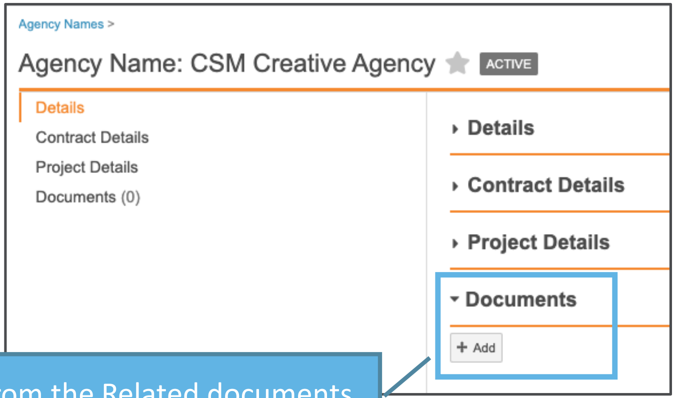
Navigation Panel Update

- Overview
  - The navigation panel on the object record detail page and the Sharing Setting page now appears on the left side of the screen instead of the right side
  - Moving the navigation panel enables users to more easily navigate to different sections on the page
  - Clicking on links within the navigation panel expand section automatically to make it easier to display the data



Update Flow for Upload & Create From Template Document in a Record’s Related Document Section

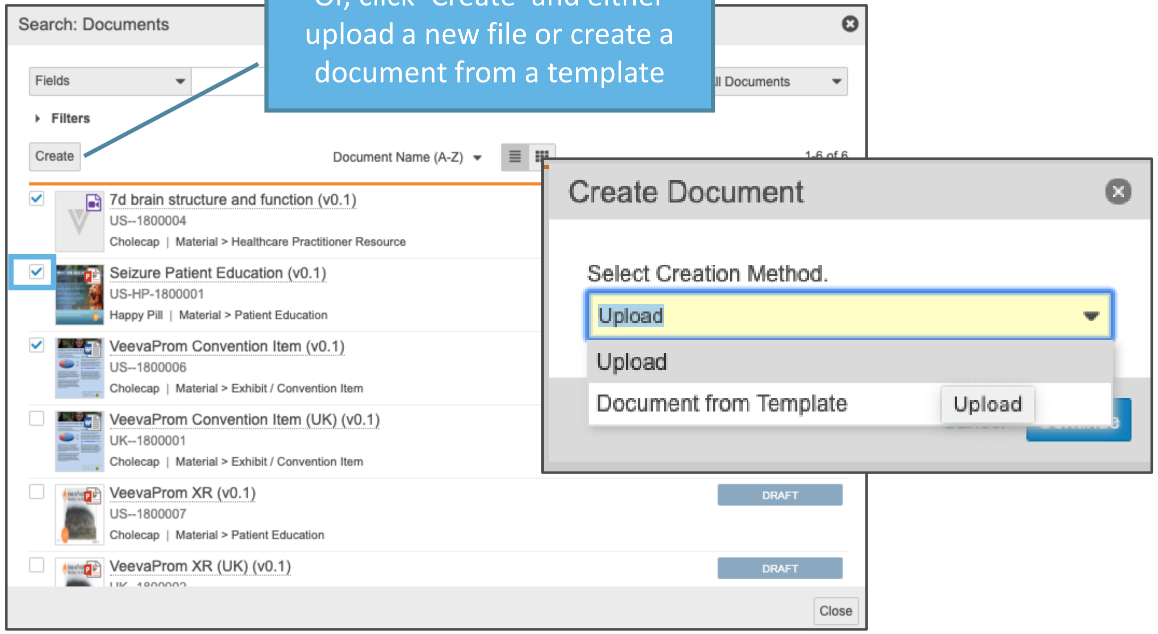
- Overview
  - The “Upload” button in the Object record’s Related Document section has been replaced with a “Create” button, which allows users to either upload a new document or create a document from a template and makes the user experience consistent with uploading a document using the global Create button



From the Related documents section, click ‘Add’

You can select documents from the provided list

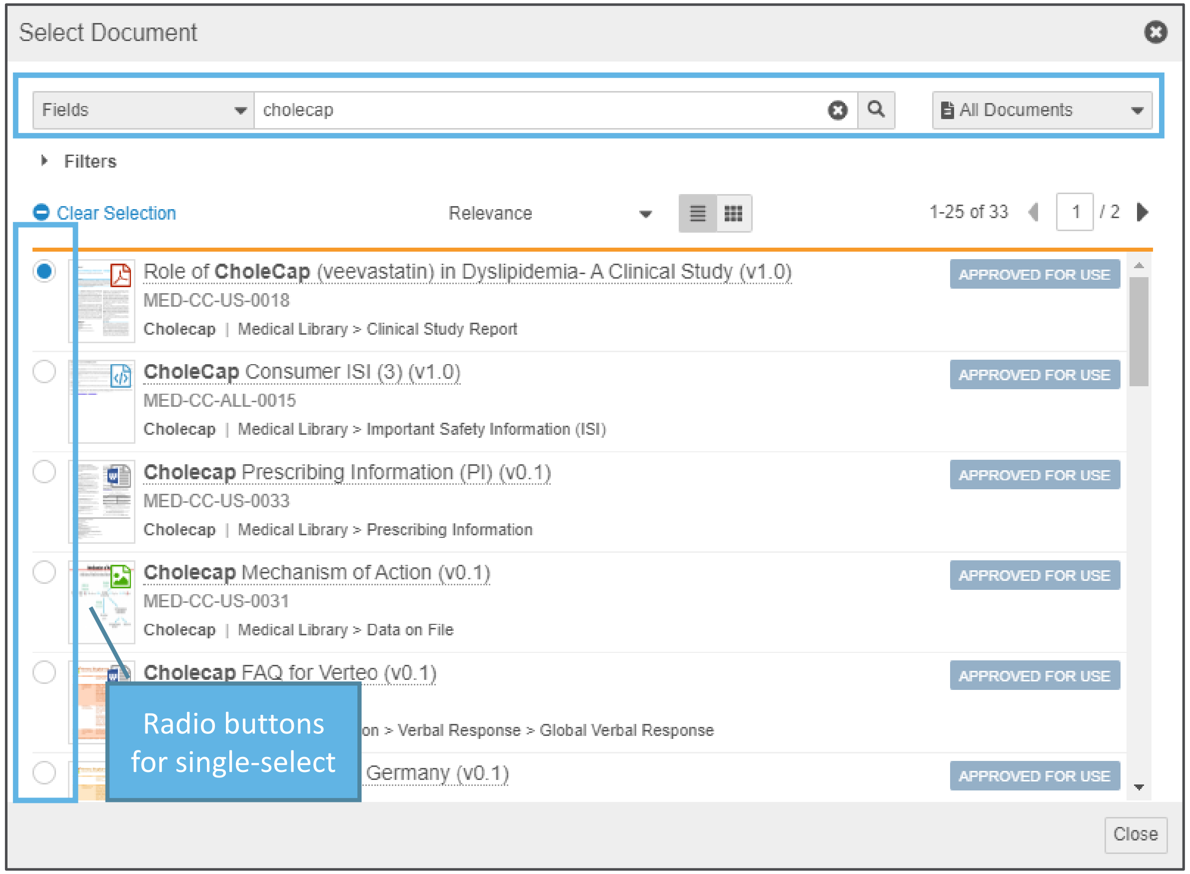
Or, click ‘Create’ and either upload a new file or create a document from a template



- Considerations
  - The relationship to the object record will automatically populate on the new document
  - Admin must add document templates before users can create documents from templates

Updated Document and Record Picker Dialog

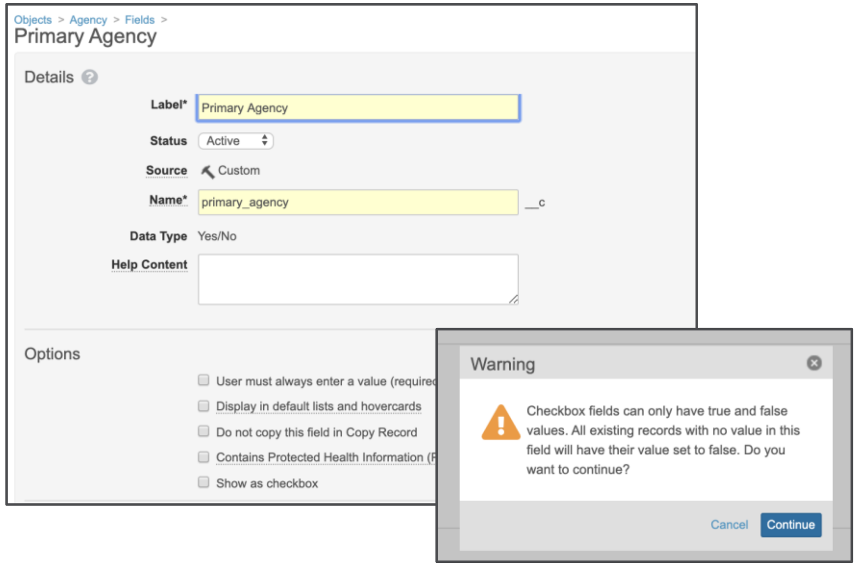
- Overview
  - New user interface for the document and Record picker dialog provides a cleaner look and feel
    - Checkboxes for multi-select
    - Radio buttons for single select

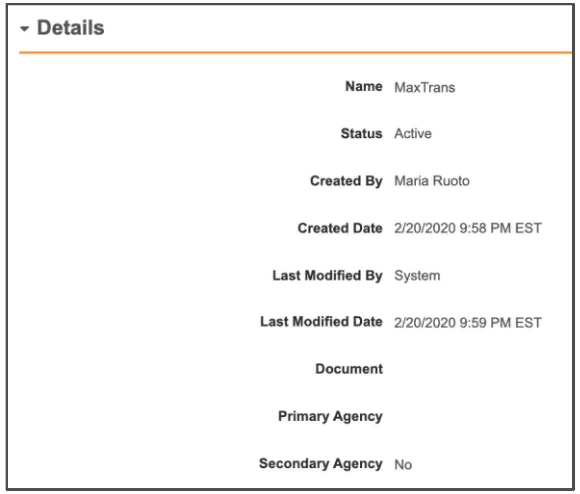


- Considerations
  - The new dialog is available in document relationships, document reference fields on records, and related document sections in object records

Prevent Null Checkboxes

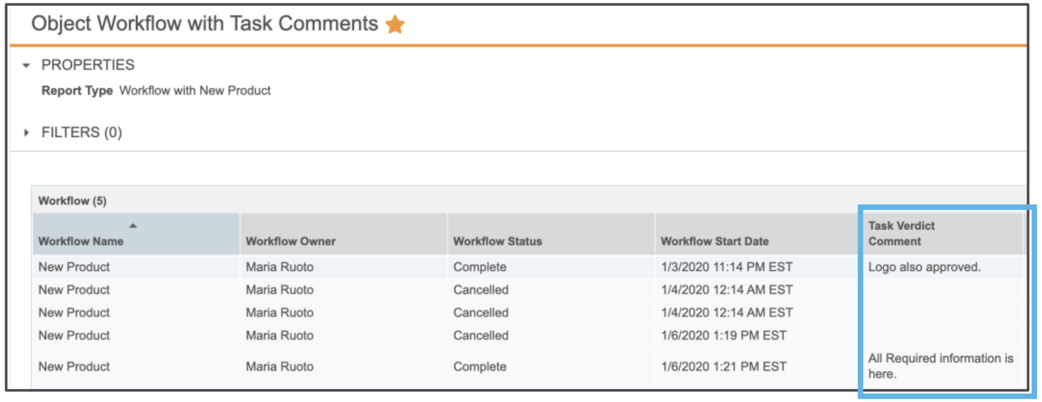
- Overview
  - Starting in this release, when users create a new record and don't provide a value, the field defaults to 'No', rather than defaulting to null/blank
- Considerations
  - This feature is Auto-on for all new records with checkbox fields
  - When an Admin adds a new checkbox field to an Object with existing records, Vault sets the field to 'No' on every existing record
  - To update checkbox fields on existing records from null to 'No':
    - Edit the Yes/No field, clearing the show as checkbox option
    - Save your changes
    - Then, edit the field again and select show as checkbox
    - On save, Vault will update all null checkbox fields on existing records

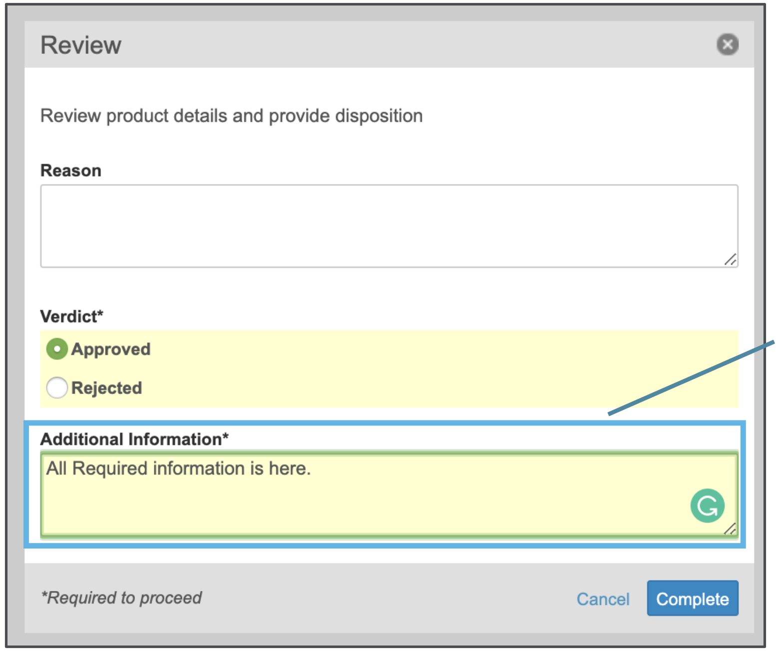




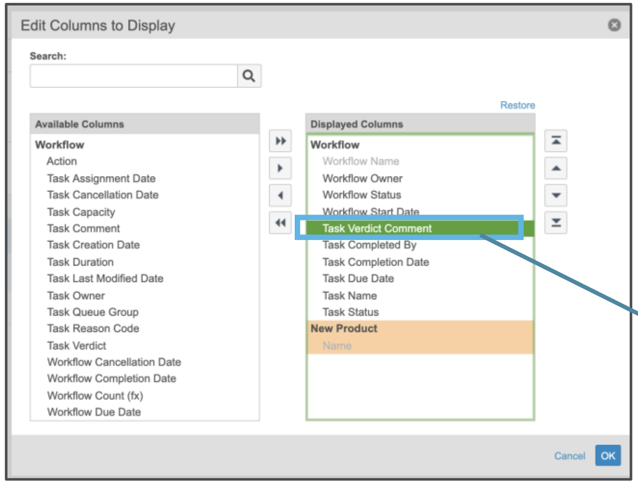
Task Verdict Comments in Reports

- Overview
  - Object workflow Task Verdict Comments were previously only viewable in the workflow timeline. With this enhancement, Object workflow Task Verdict Comments can now be included in Workflow with Object reports





Task Verdict Comments entered by workflow Task Owners can now be included in reports



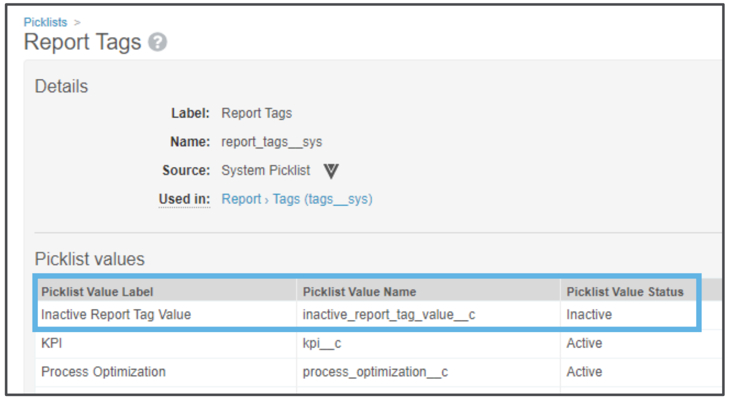
The Task Verdict Comment column must be added to the report

Task Verdict Comments in Reports

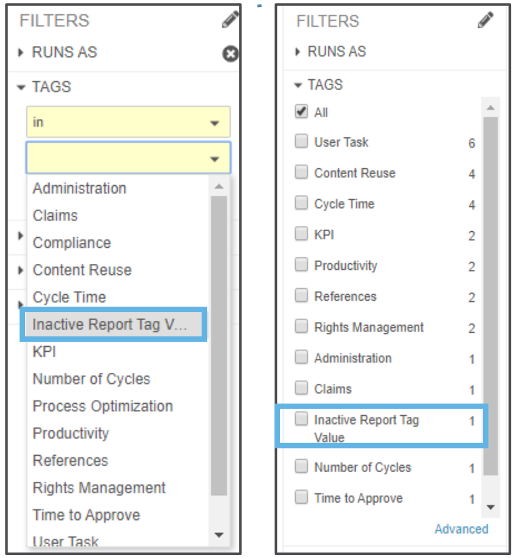
- Considerations
  - Admins must configure Object workflows to include a prompt for comments on select verdicts
    - Comments can be configured to be optional or required

Exclude Inactive Picklist Values from Filter Lookups

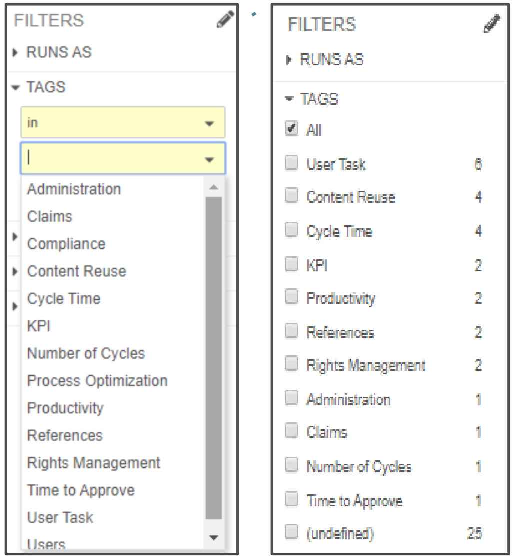
- Overview
  - As of 20R1 inactive picklist values will no longer be visible in the Advanced Mode filter lookup list



Before 20R1 inactive picklist value are displayed in the filter Advanced Mode and Basic list



After 20R1 inactive picklist value are excluded in the filter Advanced Mode and Basic list



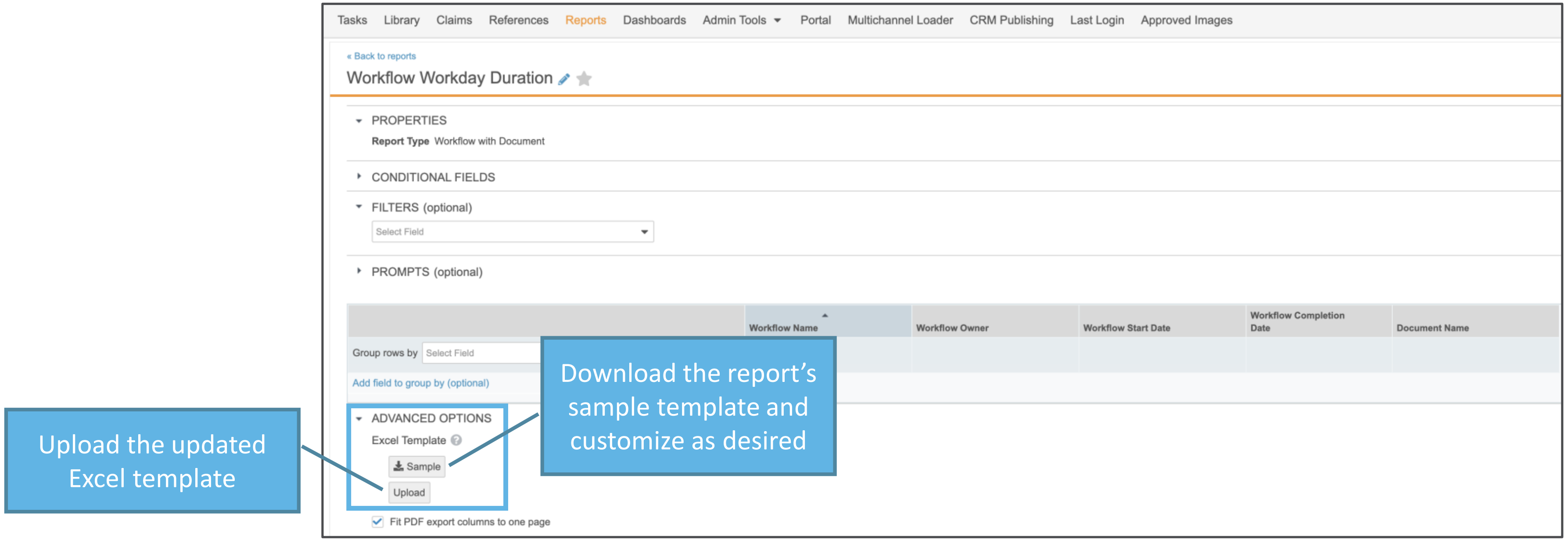
- Considerations
  - This change impacts Advanced Mode for picklist filters as well as the lookup that appears when over 15 items display on a standard picklist filter

Excel Templates for Reports

- Overview
  - Allows users to upload an Excel template to a Vault report and use it to export, analyze, and share the report
    - The templates can utilize Excel's functionality to perform calculations, apply conditional formatting, create pivot tables, access chart options, and write macros
- Considerations
  - Vault generates a sample Excel template for every report that shows:
    - Metadata about your report including report name, description, and the date that it was exported (Cover Page tab)
    - The columns in the report (Export tab)
    - Vault updates a report's sample template each time you make changes to the report
      - You can download and customize the template (e.g., move data between tabs, rename columns, etc.)
      - You should not edit the sample template tokens
  - Tokens may only be placed anywhere in the first 5 tabs
  - Bound by the Excel limit of 100K rows
  - XLSX and XLSM formats only
  - Matrix reports are not supported
  - The Export to Excel Template option is only available for saved reports

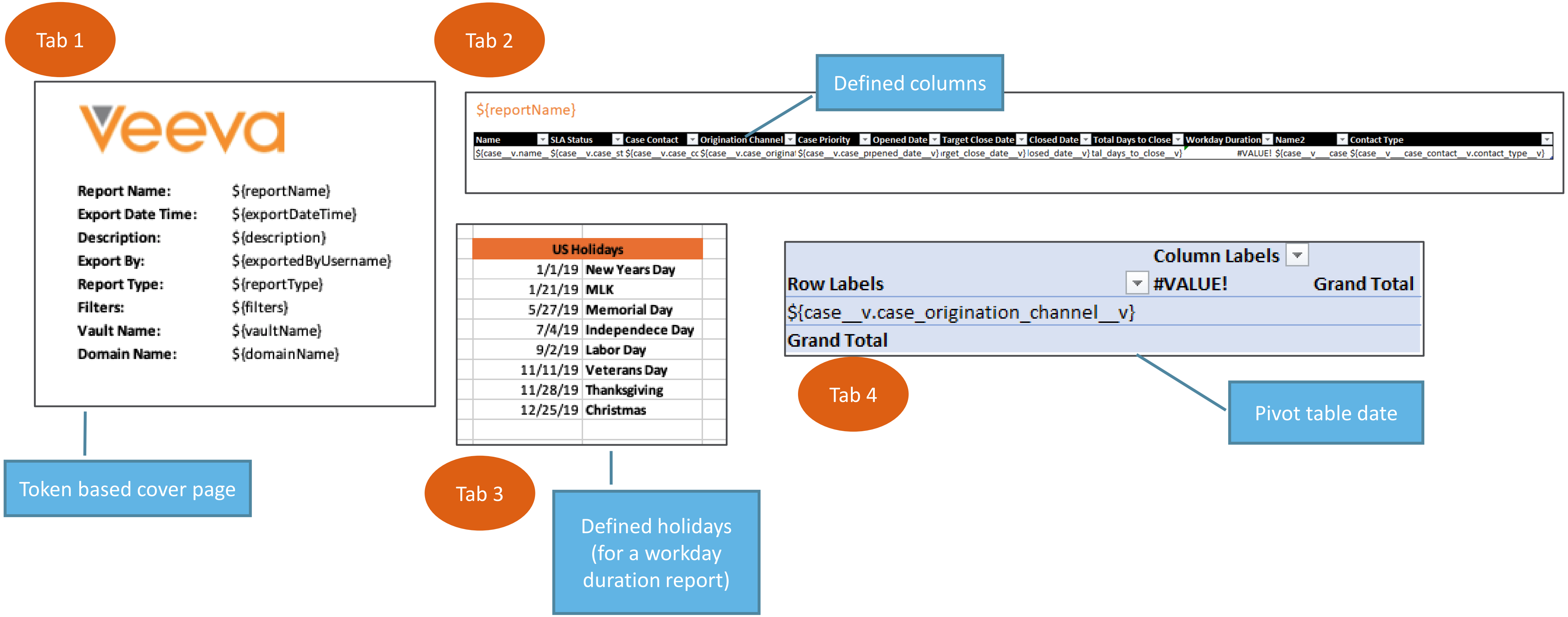
Excel Templates for Reports

- Use Case
  - You need to exclude holidays and weekends from your workflow report in order to get proper metrics for your business users
- Configuration
  - Reports > Create Report > [Report Type] > Advanced Options
    - Define your report Filters, Prompts, and Columns
    - Upload the Excel template in the Advanced Options section



Excel Templates for Reports

- Example: Excel template



Excel Templates for Reports

- Example: Excel export results

MANAGE

Schedule Flash Report

Start Multi-

EDIT

Copy Reco

Delete

EXPORT

Export to CSV

Export to Excel

Export to Excel Template

Export to PDF

VIEW

Audit Trail

Sharing Settings

PERFORM BULK ACTION

All 13 Documents

Select ‘Export to Excel Template’ from the action menu

Medical Inquiry - Resolved Cases Working Days

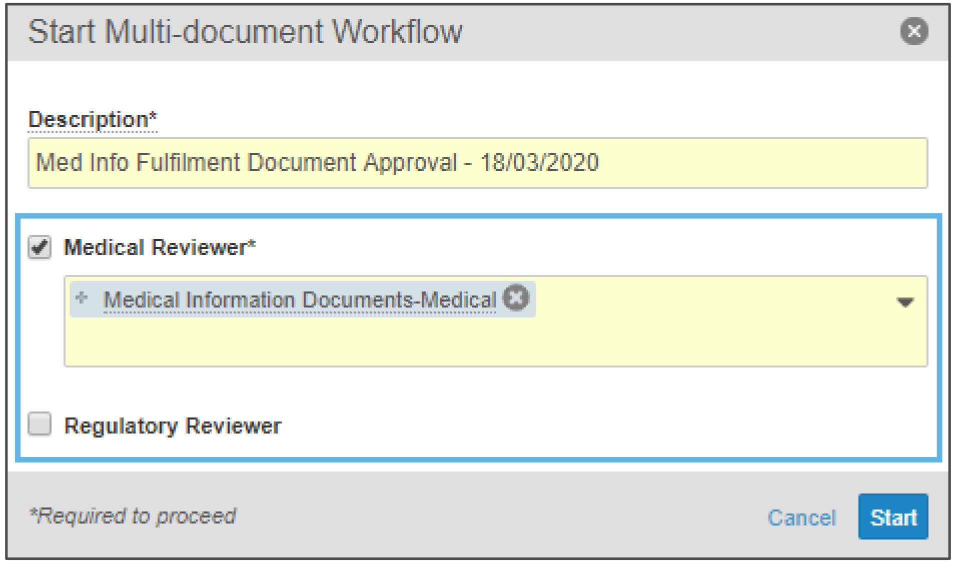
Name	SLA Status	Case Contact	Origination Channel	Case Priority	Opened Date	Target Close Date	Closed Date	Total Days to Close	Workday Duration	Name2	Contact Type
CASE-000001	icon_name='checl	James Wilson	Call Center	Standard	5/13/2019	5/18/2019	5/13/2019	0	0	James Wilson	Health Care Practitioner
CASE-000002	icon_name='checl	Karen Benson	Email	Standard	5/13/2019	5/18/2019	5/14/2019	1	1	Karen Benson	Health Care Practitioner
CASE-000003	icon_name='checl	Mark Sweeney	Web Form	Standard	6/10/2019	6/15/2019	6/11/2019	1	1	Mark Sweeney	Health Care Practitioner
CASE-000004	icon_name='checl	John Difilippo	Veeva CRM	Standard	5/13/2019	5/18/2019	5/15/2019	2	2	John Difilippo	Health Care Practitioner
CASE-000006	icon_name='checl	Karen Benson	Email	Urgent	6/11/2019	6/12/2019	6/12/2019	1	1	Karen Benson	Health Care Practitioner
CASE-000007	icon_name='checl	Brian Aarons	Call Center	High	6/11/2019	6/14/2019	6/12/2019	1	1	Brian Aarons	Health Care Practitioner
CASE-000008	icon_name='checl	Mark Sweeney	Web Form	Standard	8/1/2019	8/6/2019	8/2/2019	1	1	Mark Sweeney	Health Care Practitioner
CASE-000010	icon_name='checl	John Abraham	Web Form	Standard	8/2/2019	8/7/2019	8/5/2019	3	1	John Abraham	Health Care Practitioner
CASE-000011	icon_name='checl	Anthony Lucatort	Email	Standard	6/11/2019	6/16/2019	6/12/2019	1	1	Anthony Lucatort	Health Care Practitioner
CASE-000012	icon_name='checl	Martina Bernarde	Email	Standard	7/3/2019	7/8/2019	7/4/2019	1	0	Martina Bernarde	Health Care Practitioner
CASE-000013	icon_name='checl	Sabrina Schimdt	Email	Standard	7/3/2019	7/8/2019	7/5/2019	2	1	Sabrina Schimdt	Health Care Practitioner
CASE-000014	icon_name='checl	John Difilippo	Call Center	Standard	7/3/2019	7/8/2019	7/3/2019	0	0	John Difilippo	Health Care Practitioner
CASE-000015	icon_name='checl	Sabrina Schimdt	Email	Standard	7/3/2019	7/8/2019	7/5/2019	2	1	Sabrina Schimdt	Health Care Practitioner
CASE-000017	icon_name='checl	Michael Sandberg	Call Center	Standard	1/22/2019	1/27/2019	1/22/2019	0	0	Michael Sandberg	Health Care Practitioner
CASE-000018	icon_name='checl	Frederic Girard	Web Form	Standard	10/8/2018	10/13/2018	10/10/2018	2	2	Frederic Girard	Health Care Practitioner
CASE-000019	icon_name='checl	Miguel Gonzales	Call Center	Standard	9/20/2018	9/25/2018	9/20/2018	0	0	Miguel Gonzales	Health Care Practitioner
CASE-000020	icon_name='checl	James Porter	Veeva CRM	Standard	8/9/2018	8/14/2018	8/13/2018	4	2	James Porter	Health Care Practitioner
CASE-000021	icon_name='checl	Martina Bernarde	Email	Standard	12/13/2018	12/18/2018	12/17/2018	4	2	Martina Bernarde	Health Care Practitioner
CASE-000022	icon_name='checl	Yoonjoo Kim	Email	Standard	10/22/2018	10/27/2018	10/23/2018	1	1	Yoonjoo Kim	Health Care Practitioner
CASE-000023	icon_name='checl	Scott Burk	Call Center	Standard	12/11/2018	12/16/2018	12/11/2018	0	0	Scott Burk	Health Care Practitioner
CASE-000024	icon_name='checl	Mark Sweeney	Call Center	Standard	9/21/2018	9/26/2018	9/21/2018				
CASE-000025	icon_name='checl	Frederic Girard	Call Center	Standard	2/7/2019	2/12/2019	2/7/2019				
CASE-000026	icon_name='checl	Michael Sandberg	Email	Standard	1/7/2019	1/12/2019	1/8/2019				
CASE-000027	icon_name='checl	Johanne Mordhor	Web Form	Standard	2/26/2019	3/3/2019	2/28/2019				
CASE-000028	icon_name='checl	John Difilippo	Call Center	Standard	7/31/2019	8/5/2019	7/31/2019				
CASE-000029	icon_name='checl	Sabrina Schimdt	Email	Standard	7/31/2019	8/5/2019	8/2/2019				
CASE-000030	icon_name='checl	Alex Troncosco	Email	Standard	8/5/2019	8/10/2019	8/6/2019				
CASE-000033	icon_name='checl	Mark Sweeney	Email	Standard	8/5/2019	8/10/2019	8/5/2019				
CASE-000035	icon_name='excla	Christine Schneid	Email	Standard	9/17/2019	9/22/2019	11/12/2019				
CASE-000036	icon_name='checl	Martina Bernarde	Call Center	Standard	9/9/2019	9/14/2019	9/11/2019				
CASE-000037	icon_name='checl	John Difilippo	Call Center	Standard	9/17/2019	9/22/2019	9/17/2019				
CASE-000038	icon_name='checl	Anthony Lucatort	Email	Standard	9/17/2019	9/22/2019	9/17/2019				
CASE-000039	icon_name='checl	John Difilippo	Call Center	Standard	9/20/2019	9/25/2019	9/20/2019				

Row Labels	Average of Workday Duration
Call Center	**0.23**
High	1.00
Standard	0.17
Email	**3.40**
Standard	3.57
Urgent	1.00
Veeva CRM	**4.67**
Standard	4.67
Web Form	**1.40**
Standard	1.40
Grand Total	**2.08**

Open the download, enable macros and view your data in the template

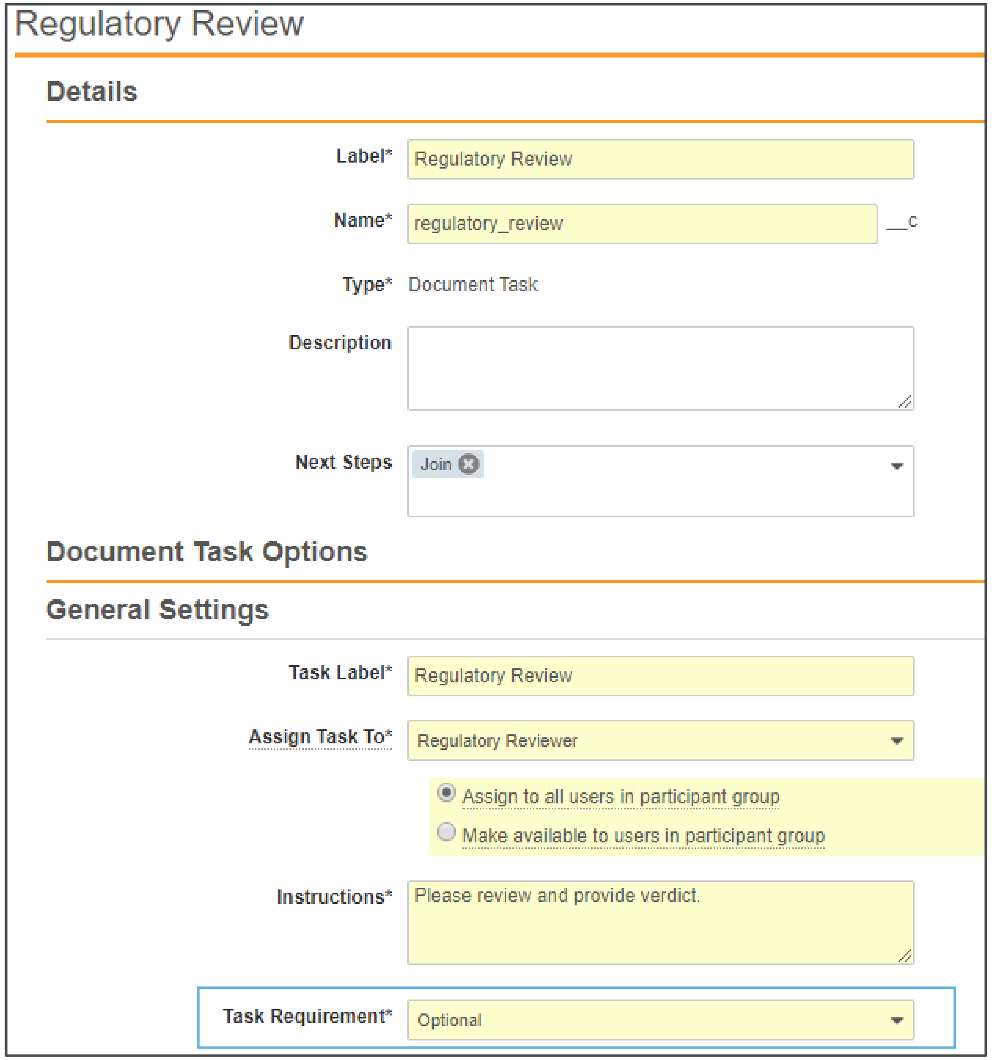
Object & MDW: Optional Tasks

- Overview
  - Admins can now configure Object or Multi-Document Workflow tasks to be optional, thus allowing the workflow initiator to determine which participants should be included in a review at the start of the workflow
- Considerations
  - This enhancement also closes a gap between Multi-Document and Document Workflows Use Case
  - Some types of document may require participation by a Compliance Officer (e.g., co-pay cards and holders). If the Compliance user task was configured to be optional in the MDW promotional material workflow:
    - Admins would only have to maintain one workflow
    - initiators have the ability include this task when necessary



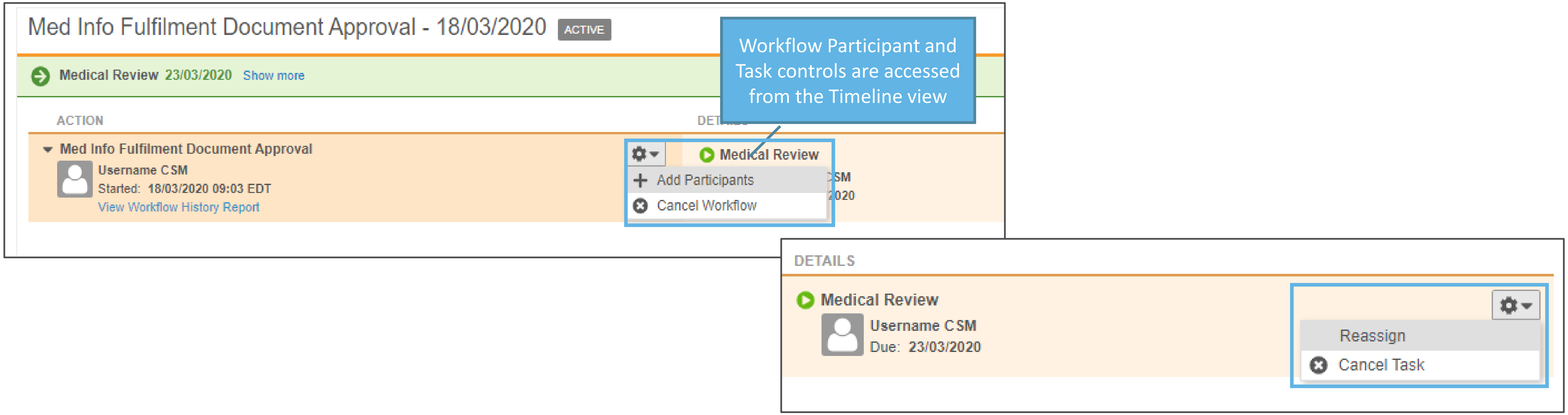
Object & MDW: Optional Tasks

- Configuration
  - Admin > Configuration > Multi-Document Workflows > [Task]



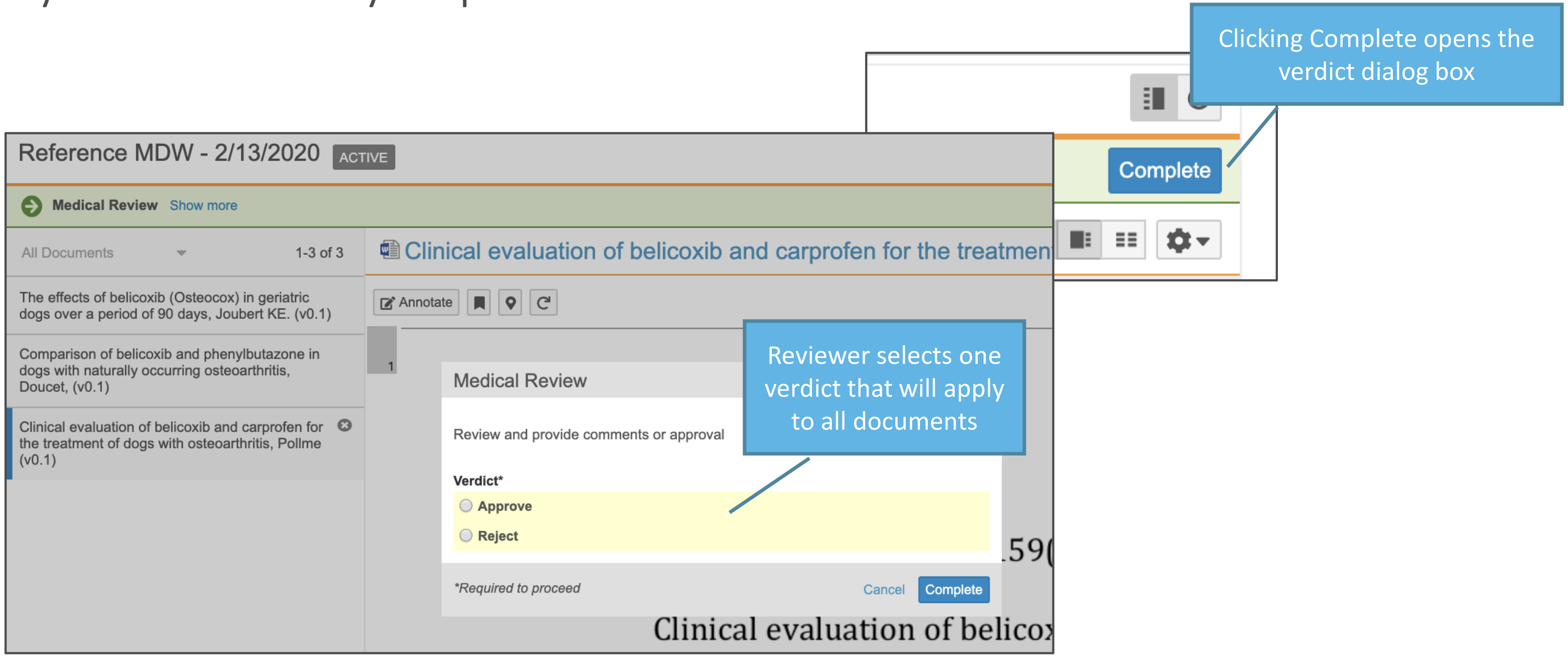
MDW: Add Participants and Reassign Task

- Overview
  - Users can now add participants to an active Multi-Document Workflow without having to cancel and restart the workflow
  - Additionally, user tasks can be reassigned
- Considerations
  - This enhancement closes a gap between Multi-Document and Document Workflows
  - Tasks can only be reassigned to users with the correct document role membership



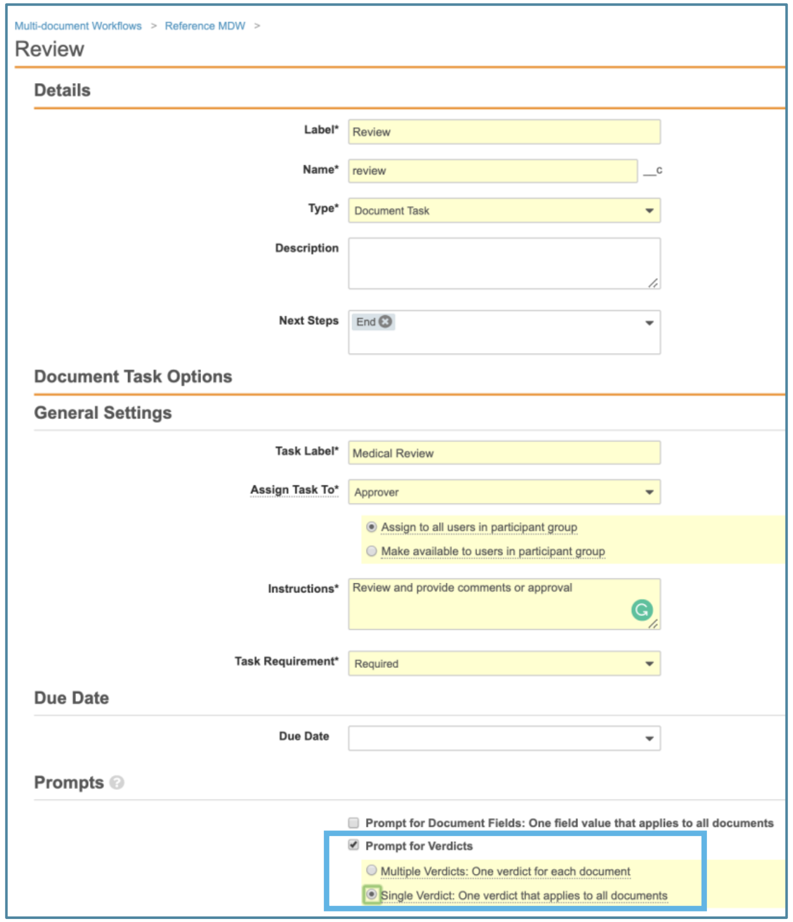
MDW: Single Verdict for All Content Documents

- Overview
  - This enhancement allows Admins to configure document tasks in a Multi-Document Workflow to prompt for a single verdict that will apply to all content documents
- Considerations
  - Only available for lifecycle specific Multi-Document Workflows



MDW: Single Verdict for All Content Documents

- Configuration
  - Admin > Configuration > Multi-document Workflows > [Workflow] > [Document Task] > Prompts > Prompt for Verdicts > Single Verdict: One verdict that applies to all documents

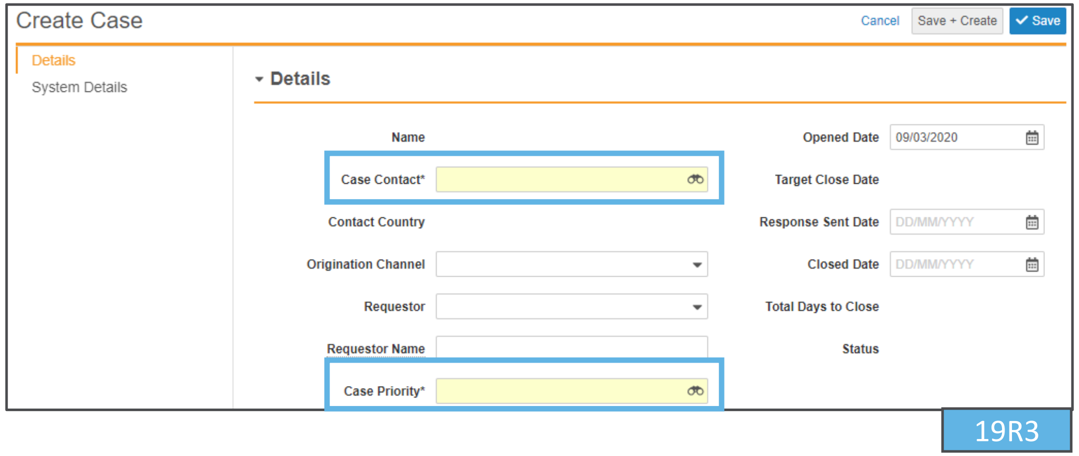


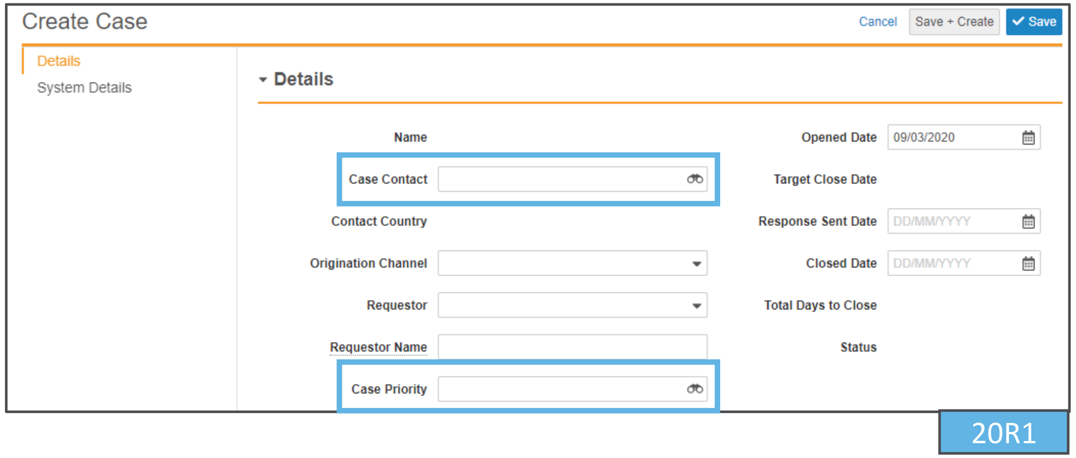
Configurable Features

Enhanced Configurability of Standard Fields on Select Medical Inquiry Standard Objects

- Overview
  - Customers are able to chose which fields they want to be mandatory

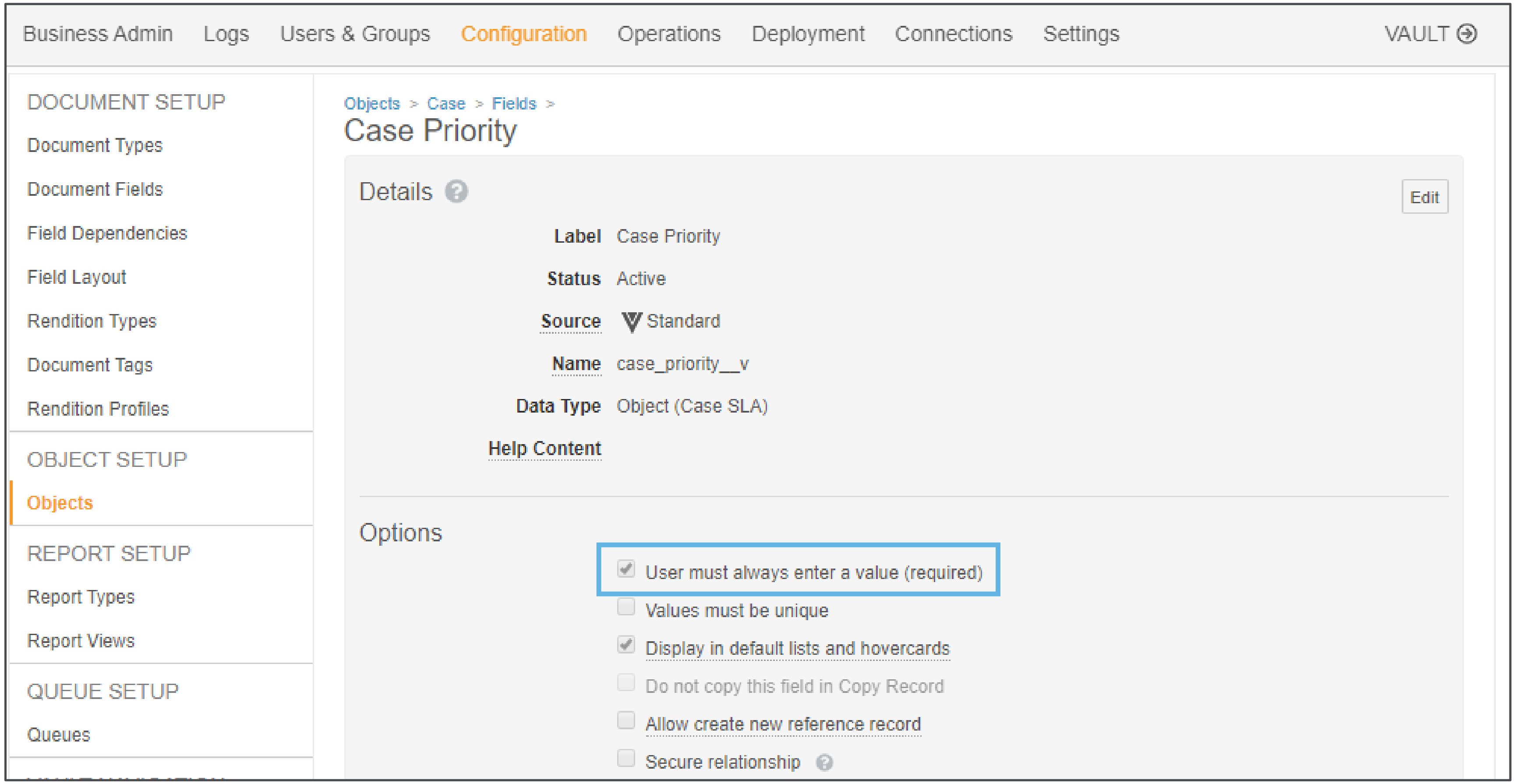
- Impact
  - This provides greater flexibility to customers to determine which fields they wish to mandate:
  - Cases: Case Contact, Case Priority, Origination Channel
  - Case Request: Request Category, Preferred Response Method
  - Case Contact: National Provider Identifier (NPI), Specialty





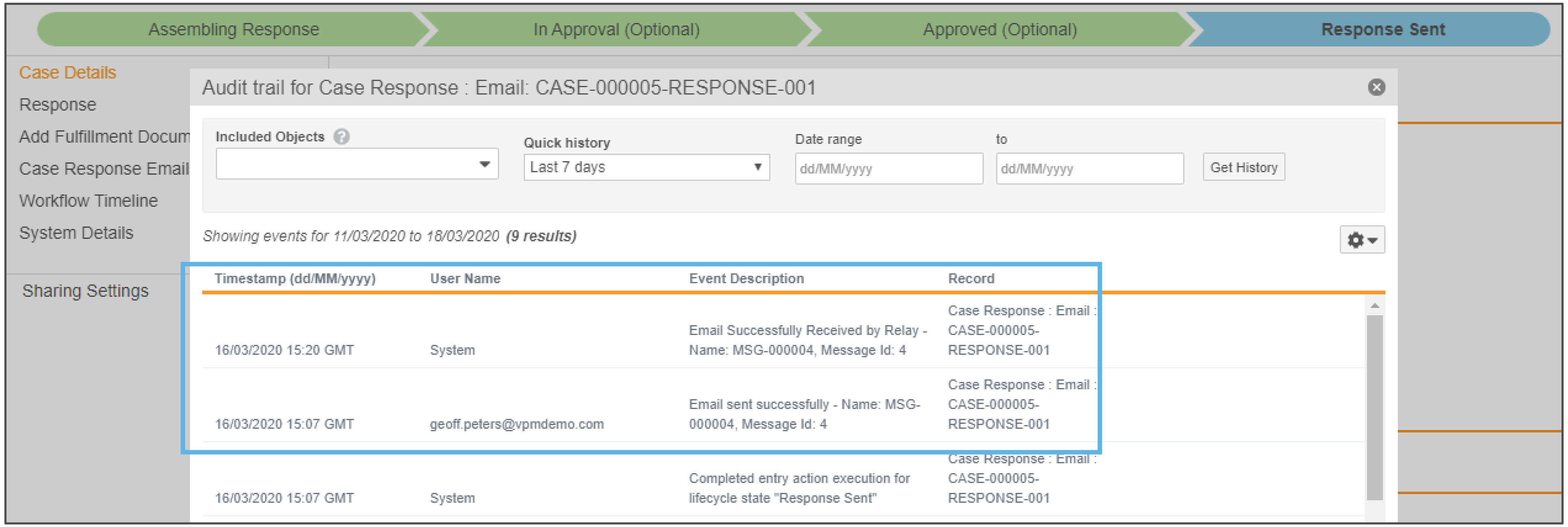
Enhanced Configurability of Standard Fields on Select Medical Inquiry Standard Objects

- Configuration
  - Admin > Configuration > Objects > [Object] > Fields > [Field] > Edit Field
  - Toggle field to determine if mandatory or not



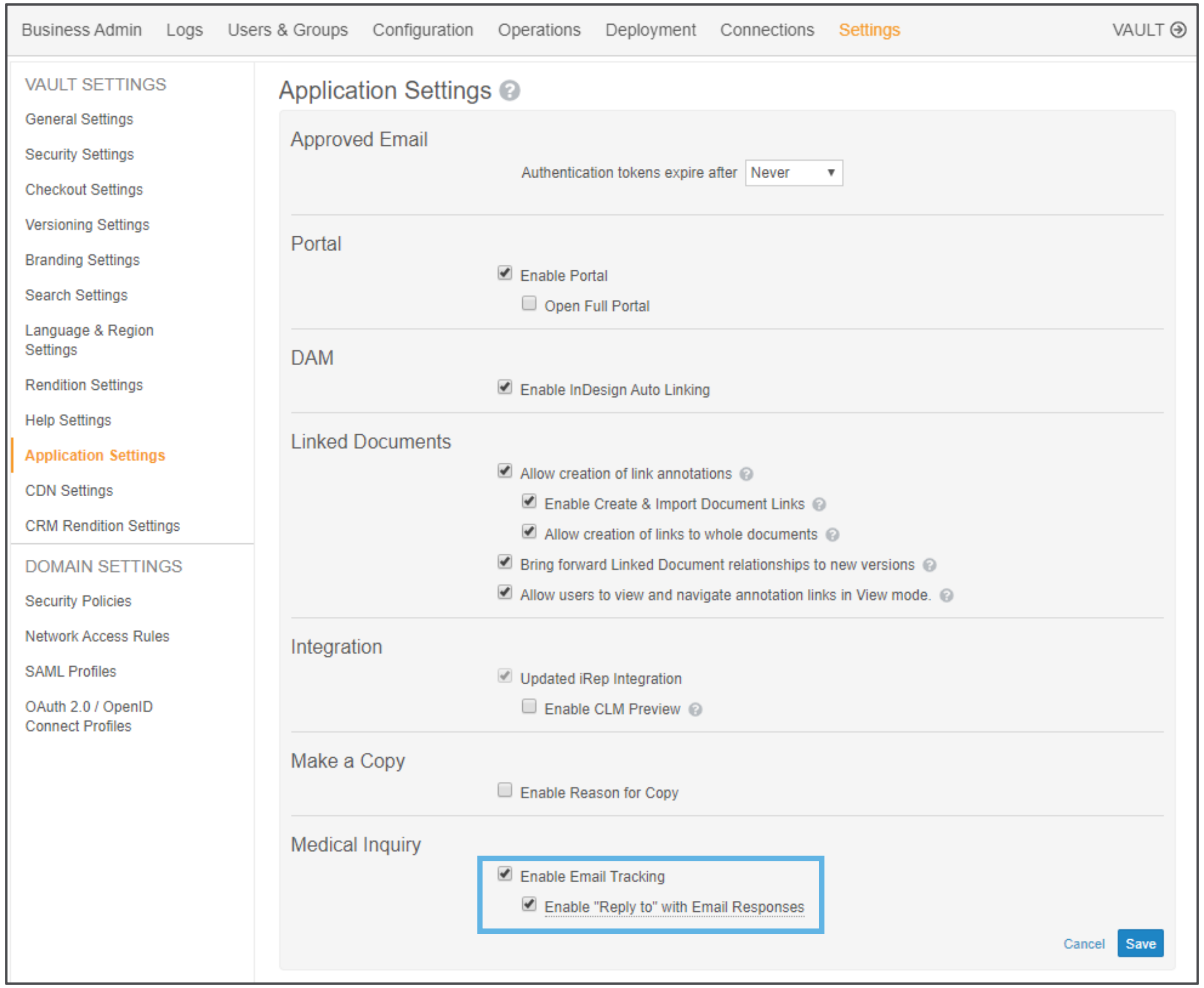
Enhanced Medical Inquiry Email Capabilities

- Overview
  - Customers have greater email capabilities for Medical Info Inquiries
- Impact
  - Customers can track sent emails from MedComms and the Med Info Case Handler will be notified if and why an mail failed to send
  - Status of sent emails is captured in the audit trail and a record of what was sent is retained
  - Customers can specify a “Reply to” email address in the response sent, enabling the recipient to reply to the Case Handler directly



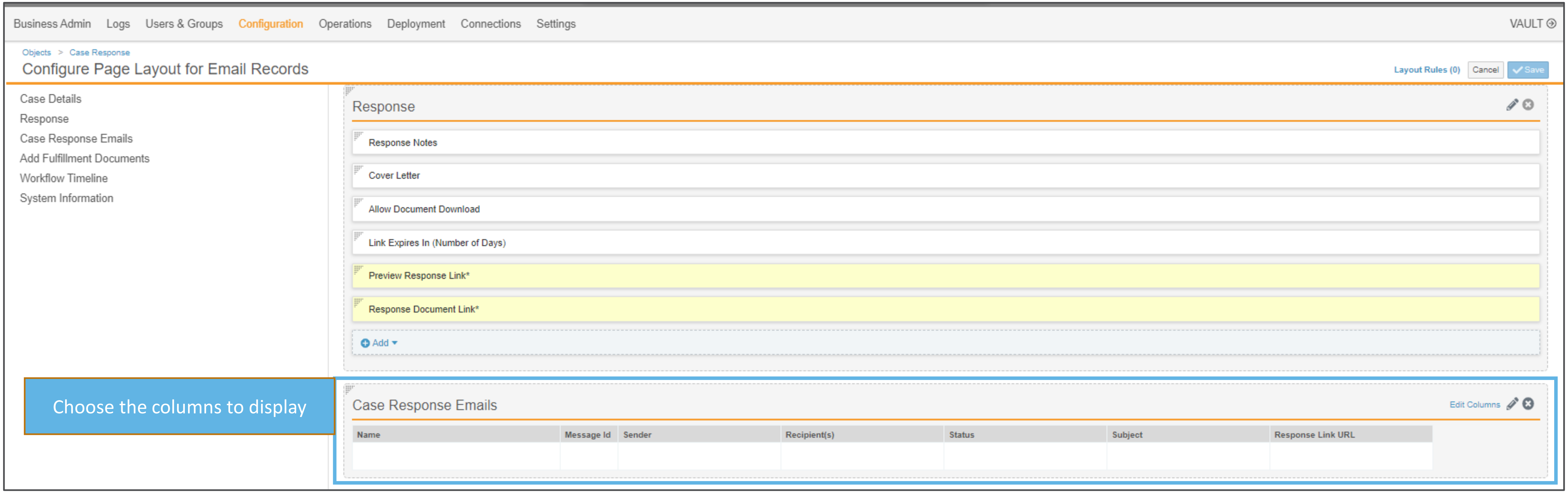
Enhanced Medical Inquiry Email Capabilities

- Configuration
  - Admin > Settings > Application Settings > Medical Inquiry



Enhanced Medical Inquiry Email Capabilities

- Considerations
  - Customers will need configure their Case Response object to display the additional email details
  - Admin > Configuration > Objects > Case Response > Page Layouts > Email Detail Page Layout > Add Section > Related Objects > Add Case Response Email



Enhanced Medical Inquiry Email Capabilities

- Email Tracking handles the following scenarios:
  - Case Contact has no email address
  - Case Contact has an invalid email address
  - Email bounced

Audit trail for Case Response : Email: CASE-000006-RESPONSE-001

Included Objects

Quick history: Last day

Date range: dd/MM/yyyy to dd/MM/yyyy

Showing events for 17/03/2020 to 18/03/2020 ***(11 results)***

Response package failed to send. Case contact email is missing

Error if Case Contact has no email address

Timestamp (dd/MM/yyyy)	User Name	Event Description	Record
18/03/2020 14:36 GMT	System	"Lifecycle State" changed from "Response Sent" to "Email Bounced"	Case Response : Email : CASE-000006-RESPONSE-001
18/03/2020 14:36 GMT	System	"STATESTAGE-000004" was removed from the "Lifecycle State Stage ID" field.	Case Response : Email : CASE-000006-RESPONSE-001
18/03/2020 14:36 GMT	System	Email Bounced - Name: MSG-000005, Message Id: 5 - 'to' parameter is not a valid address. please check documentation~~400	Case Response : Email : CASE-000006-RESPONSE-001
18/03/2020 14:36 GMT	geoff.peters@vpmdemo.com	Email sent successfully - Name: MSG-000005, Message Id: 5	Case Response : Email : CASE-000006-RESPONSE-001

Email bounced as invalid email address

Enhanced Medical Inquiry Email Capabilities

- Sample email notification to user who sent email where it failed to arrive

Delivery of your Medical Inquiry Response Email was not successful

Case Response: CASE-000006-RESPONSE-001

Case Response Details:

- Email Bounce Time: March 18, 2020 2:36:11 PM
- Email Bounce Reason: 'to' parameter is not a valid address. please check documentation~~400

Access your Vault here: MedicalDemo3

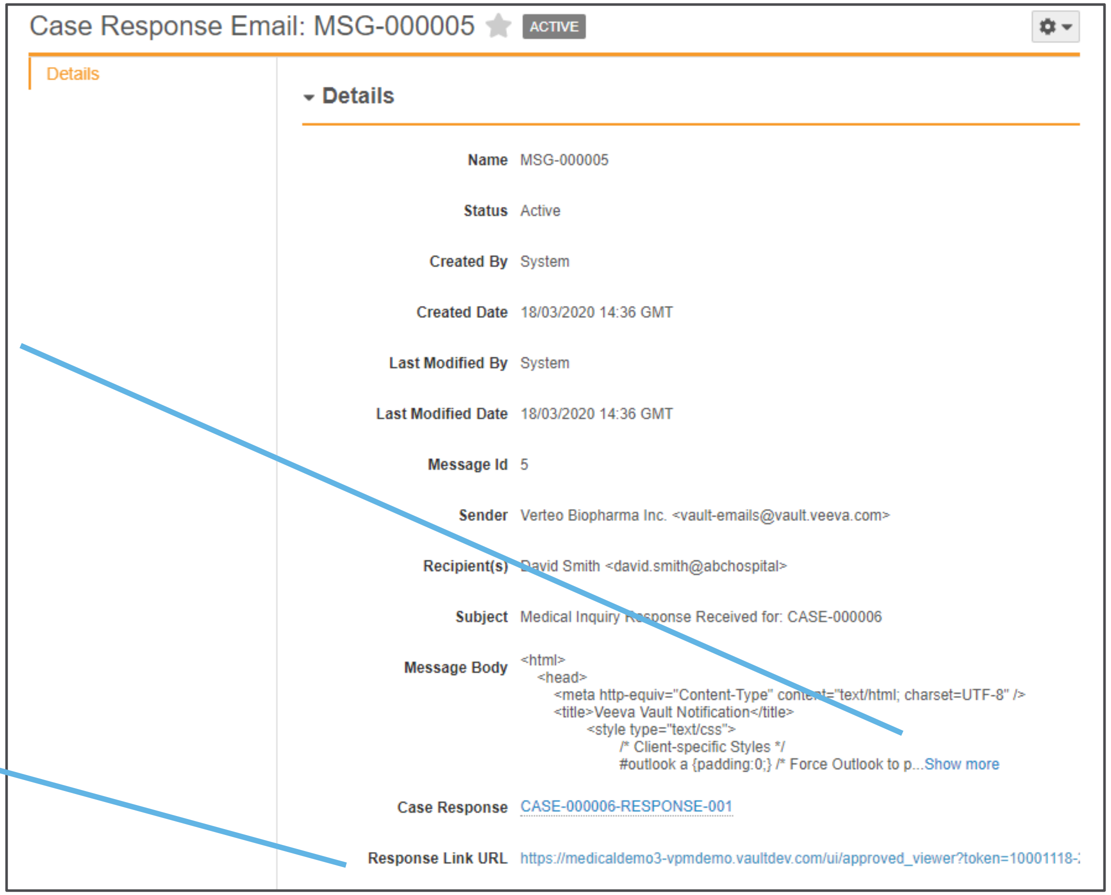
This message is automatically generated by Veeva Vault and sent from the MedicalDemo3 vault medicaldemo3-vpmdemo.vaultdev.com. If you think it was sent incorrectly, please contact your Vault administrators. To ensure delivery to your inbox, please add vault-emails@veeva.com to your address book.

Enhanced Medical Inquiry Email Capabilities

- Users can see the full email as was sent to the recipient under the Case Response Email section

Email body can been seen in full if required – source info is HTML

Sent documents are visible here



Enhanced Medical Inquiry Email Capabilities

David Smith,

Thank you for your recent inquiry. Your case ID, if you have any other questions, is CASE-000006.

We have provided a link to an electronic response package for your review and are confident that this literature will provide many of the answers that you have requested. Simply click on the link below and a new window will appear where you will have access to the provided literature.

Click the following link to view your response package: Response Package

If there is additional information you would like to have regarding our products, please do not hesitate to contact us. We will be most happy to be of assistance.

Again, thank you very much for giving us the opportunity to provide you the information that you are looking for.

Sincerely,

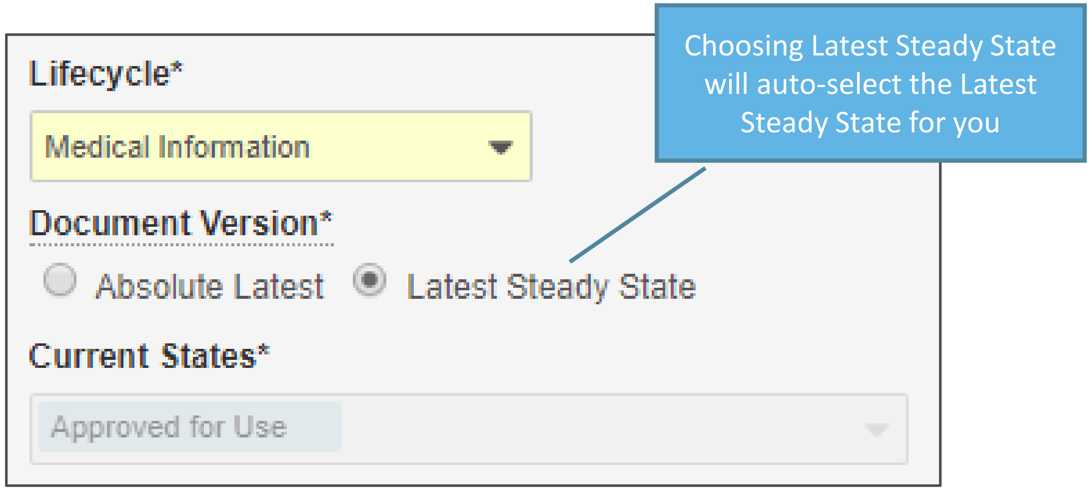
Verteo Medical Inquiry Team

This email was sent to you by Veeva Vault, the first cloud-based suite of content management applications for the global life sciences industry. Learn more at www.veeva.com/vault If you think it was sent incorrectly, please contact your Vault administrators. To ensure delivery to your inbox, please add vault-emails@veeva.com to your address book.

Link to response package available here

Run Job on Latest Steady State Version

- Overview
  - Admins can now create a document state change job to run on the latest steady state version of a document that has progressed to a later non-steady state
- Use Case
  - If you create a new draft of an existing brochure that doesn't get approved by the current steady state version's expiration date, this operation will ensure the currently approved version expires on the expected expiration date
- Configuration
  - Admin > Operations > Job Definitions > Create Job
  - Learn more about [Configuring Job Definitions]



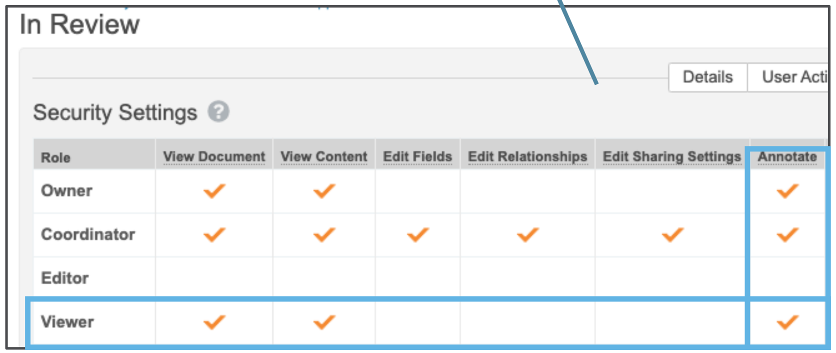
Enable External Users to Bring Forward Anchor Annotations

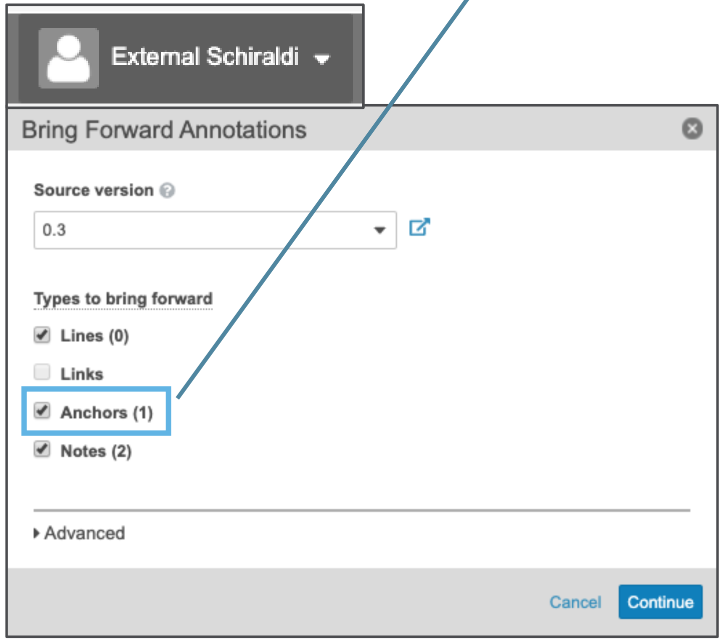
- Overview
  - External users can now bring forward anchor annotations when granted the Manage Anchors permission in a custom Permission Set and the Annotate permission in the document's Lifecycle State Security Settings
- Configuration
  - Admin > Settings > Users & Groups > [Permission Set]
  - Admin > Settings > Configurations > [Lifecycle] > [State] > Security Settings
- Learn more about Bring Forward Annotations

External users are now able to Bring Forward Anchor Annotations

Custom Permission Set

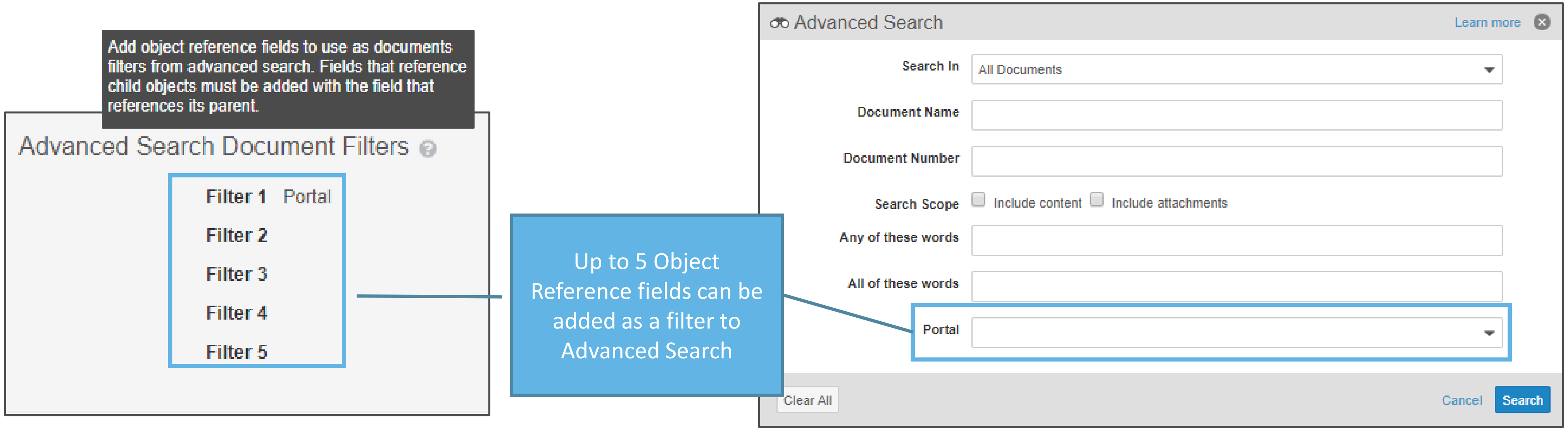
Document's Lifecycle State Security Settings





Object References in Advanced Search

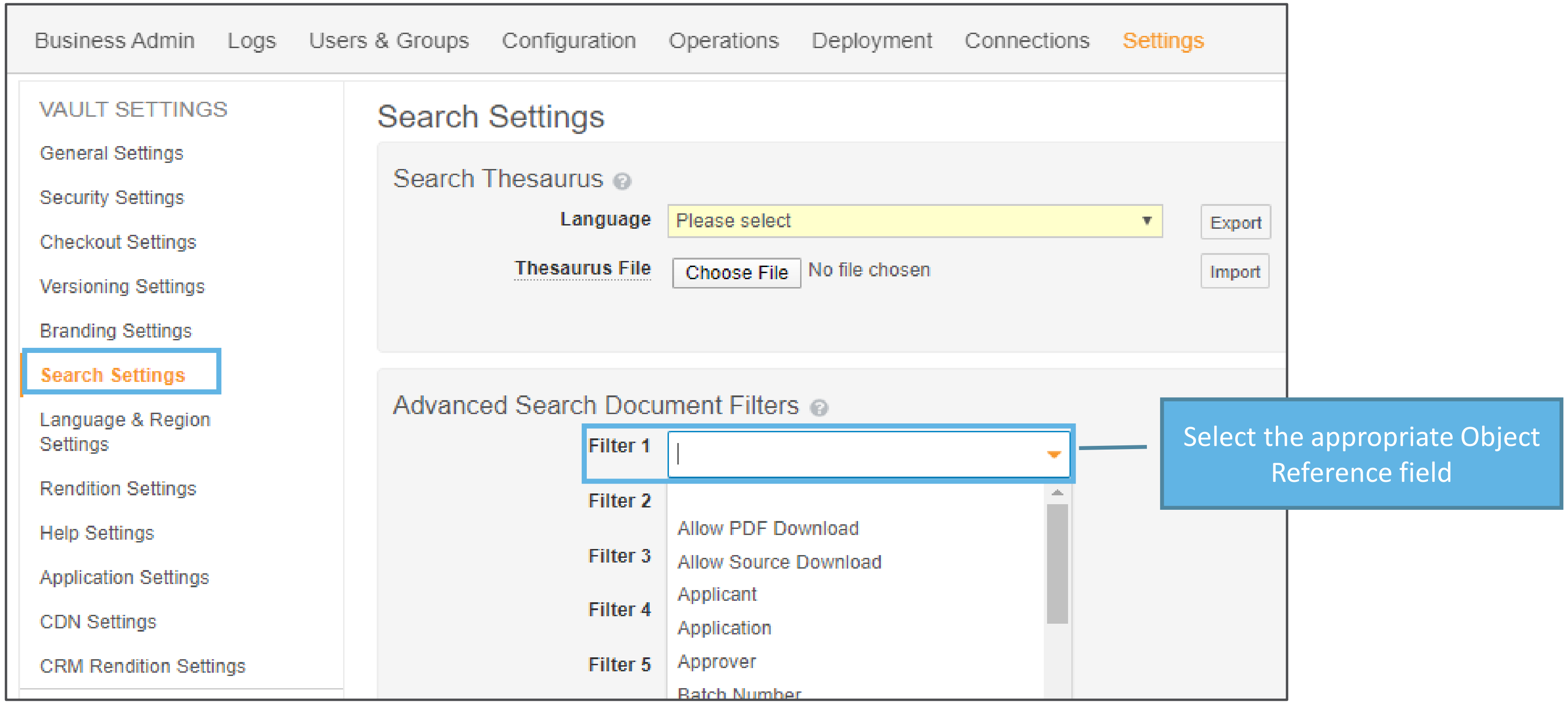
- Overview
  - The Advance search on documents can now be customized to include filters on any Object Reference field



- Considerations
  - Advanced search filters are limited to Object Reference fields (No picklist, date, or number fields)
  - When adding two or more filters with a parent/child relationship, the user is guided to drill down starting with the highest parent

Object References in Advanced Search

- Configuration
  - Admin > Settings > Search Settings > Advanced Search Document Filters > Edit



Entry Criteria: Content Must Not be Checked Out

- Overview
  - There is a new document lifecycle state entry criteria that can verify whether a document is checked out when entering a specific state
  - For example, the Approved for Production state may have entry criteria that ensures documents are not approved which the content is checked

Document Lifecycles > Medical Information > States >

Approved for Use

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

Entry Criteria

Edit

Rules	
Always	Validate that Response Type is not blank and Expiration Date is not blank
Always	Validate that Content is not checked out

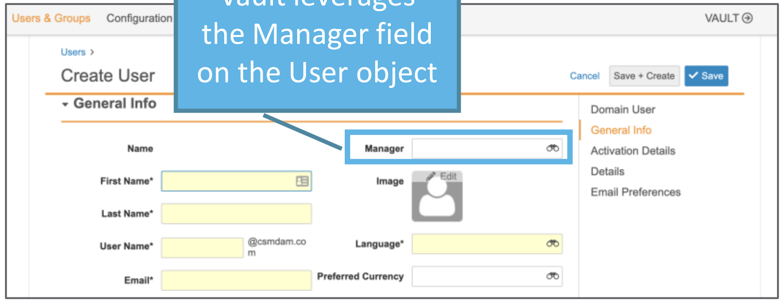
- Configuration
  - Admin > Configuration > Document Lifecycle > [Lifecycle] > States > [State] > Entry Criteria > Edit
- Use Case
  - Organizations that allow users to check out documents can leverage this enchantment to safeguard against users forgetting to check in documents

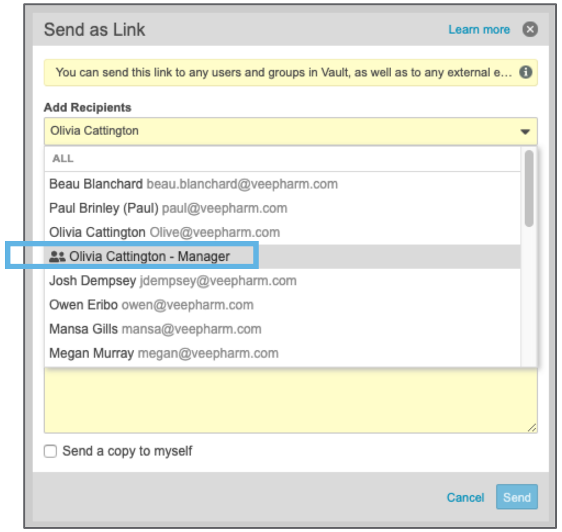
Admin

Manager Groups

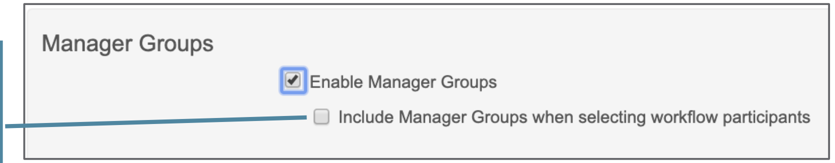
- Overview
  - Vault can now create system-managed groups that include users' direct managers
    - Can be used to provide access to documents and objects and visibility to various tasks
- Considerations
  - If the manager field is blank on a user record, manager groups are still created despite having no members
    - Vault accounts for changes in reporting hierarchies by updating the manager group accordingly
  - Is visible throughout Vault in users and group selectors
    - Manager groups do not appear in group selection picklists or when selecting members in custom sharing rules
- Configuration
  - Admin > Settings > Security Settings > Manager Groups

Vault leverages the Manager field on the User object



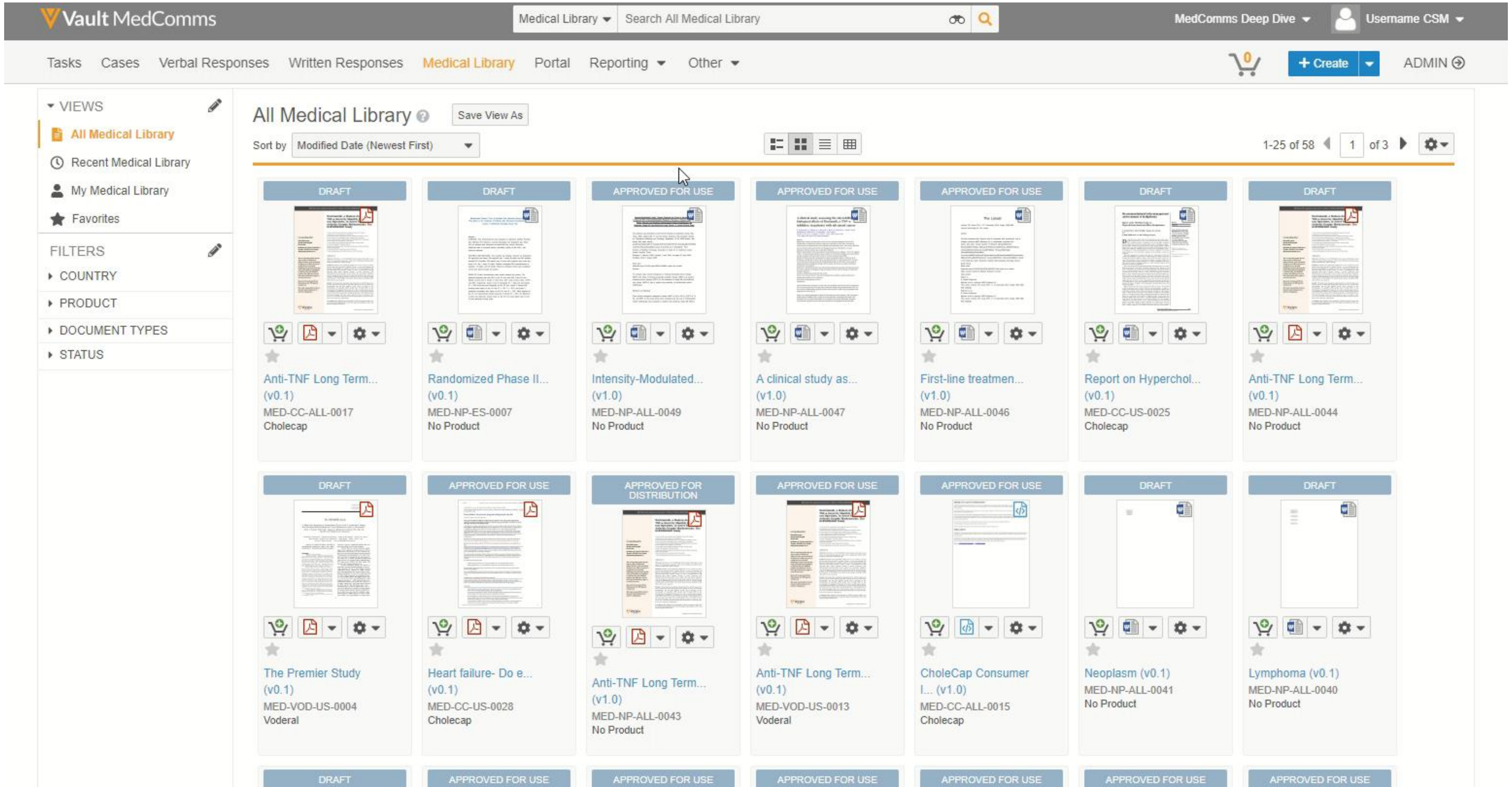


If the 'Include Manager Groups when selecting workflow participants' option is enabled, you also see manager groups when assigning workflow participants



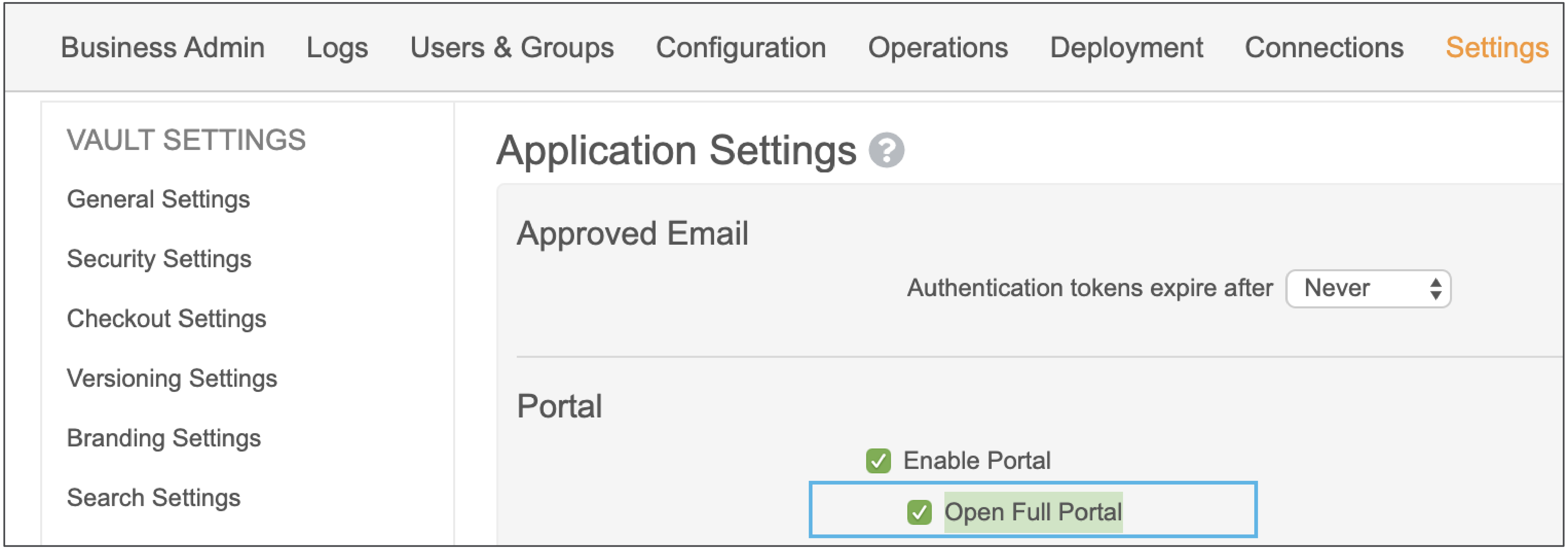
Open Portal Experience from Vault

- Overview
  - This feature enables users to open the Portal directly from within Vault
  - Additionally, users with the correct permissions, can now select ‘Edit Portal’ from the Portal dropdown list, making Portal management easier



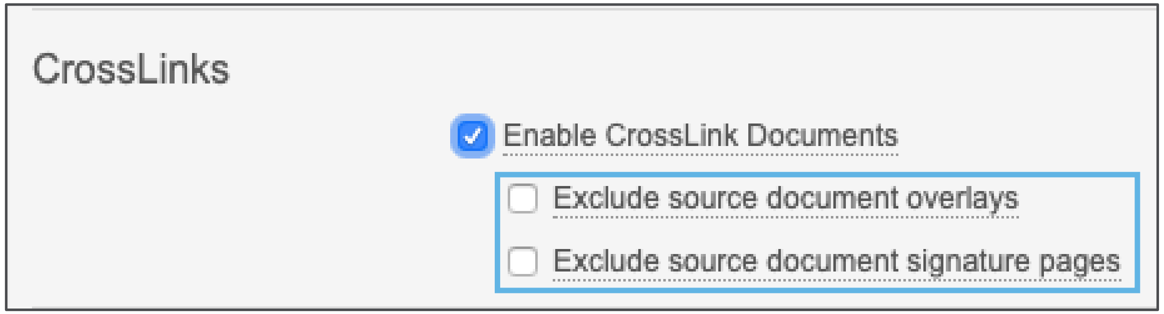
Open Portal Experience from Vault

- Configuration
  - This feature is enabled as a sub flag of the Portal feature flag



Configurable CrossLink Renditions

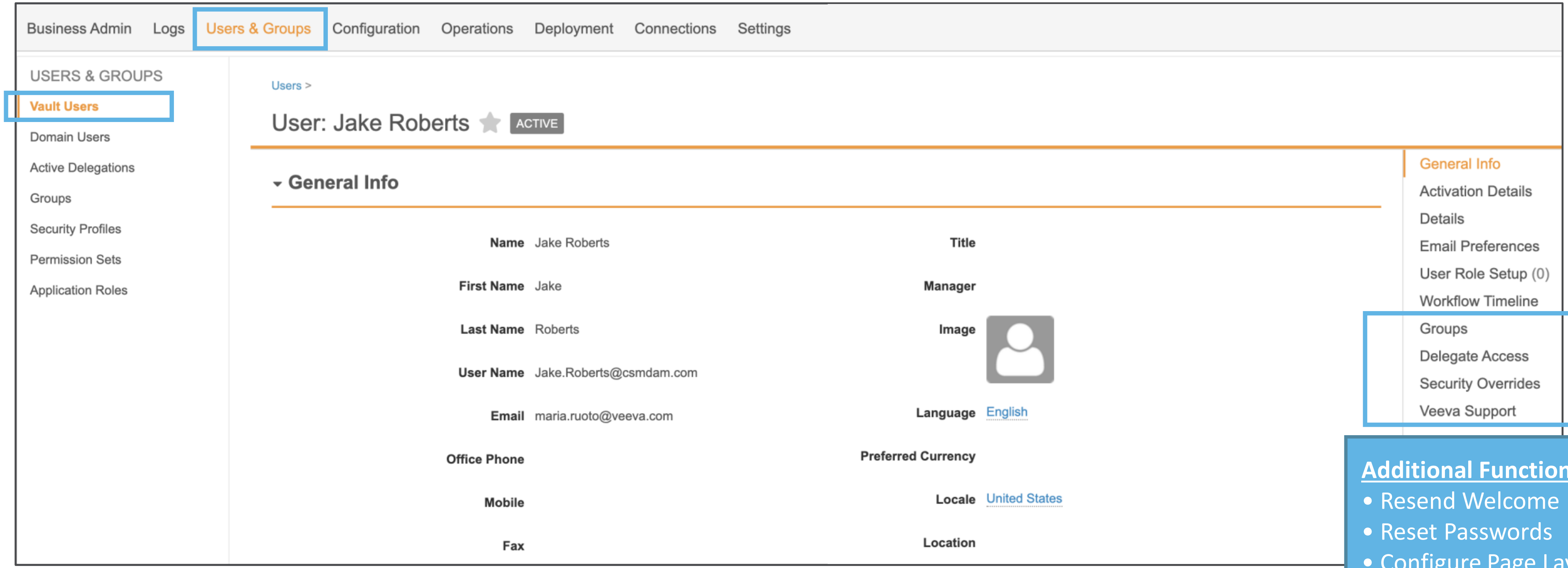
- Overview
  - Prior to this release, the CrossLink document's viewable rendition always contained any overlay and signature pages from the source document itself
  - In this release there are two additional checkboxes in General Settings which allow you to exclude overlays and signature pages from the CrossLinked document

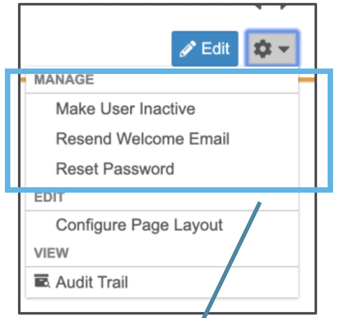


- Use Case
  - If CrossLinking is used to link a document from a Regulatory Vault to MedComms, you can now chose whether or not to bring over any overlays or signature pages.
- Configuration
  - Admin > Settings > General Settings > CrossLinks

User Object Admin Page

- Overview
  - In 20R1 the User Admin page has been updated to leverage the User object and align the page layout with Business Admin and Custom Tab user object pages





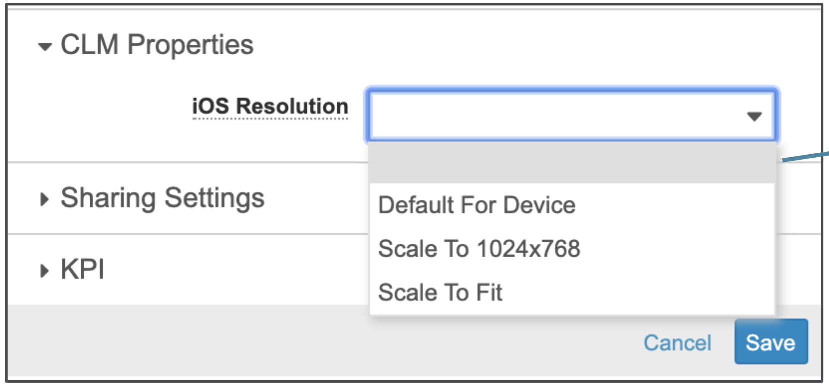
Additional Functionality Includes:
- Resend Welcome Emails
- Reset Passwords
- Configure Page Layout
- Viewing and managing group membership
- Delegating access
- Viewing Security Overrides
- Providing Vault Support Access
- Creating Cross domain users
- Force Security Question Update

User Object Admin Page

- Considerations
  - Any users with the Admin: User: Create and Admin: User: Edit permission are now automatically granted the Read and Edit permissions on all User object fields
  - Vault Users
    - Only one-page layout for user object in business admin, users & groups, custom tab
    - Mandatory fields need to be included in VOF layout, such as, security profile, license type, security policy, and application license information
  - Domain Users (Domain Admin Only)
    - Read-only view of all domain users
    - Vault membership managements (assign/un-assign users to Vaults)
    - Editing User attributes must be done in Vault Users UI (where user has a membership)
      - When needed, domain admin can use the Vault selector to edit users not assigned to current Vault
    - No API or Loader change when using legacy user object

New Shared Field: iOS Resolution

- Overview
  - Currently all CLM content has been fixed at 1024x768 px resolution. Moving forward Veeva CRM will implement native resolution, which will be responsive based upon the user's iPad size
  - The CRM change could cause existing content to display incorrectly. The CLM iOS Native Resolution shared field will allow users to override native resolution and display content at the original 1024x768 px or scale content to fit screen
  - Ensures existing CLM content will continue to render properly
- Use Case
  - If existing CLM content is hardcoded at 1024x768 px, selecting "Scale to 1024x768" for this field will ensure it continues to display correctly on user's iPad



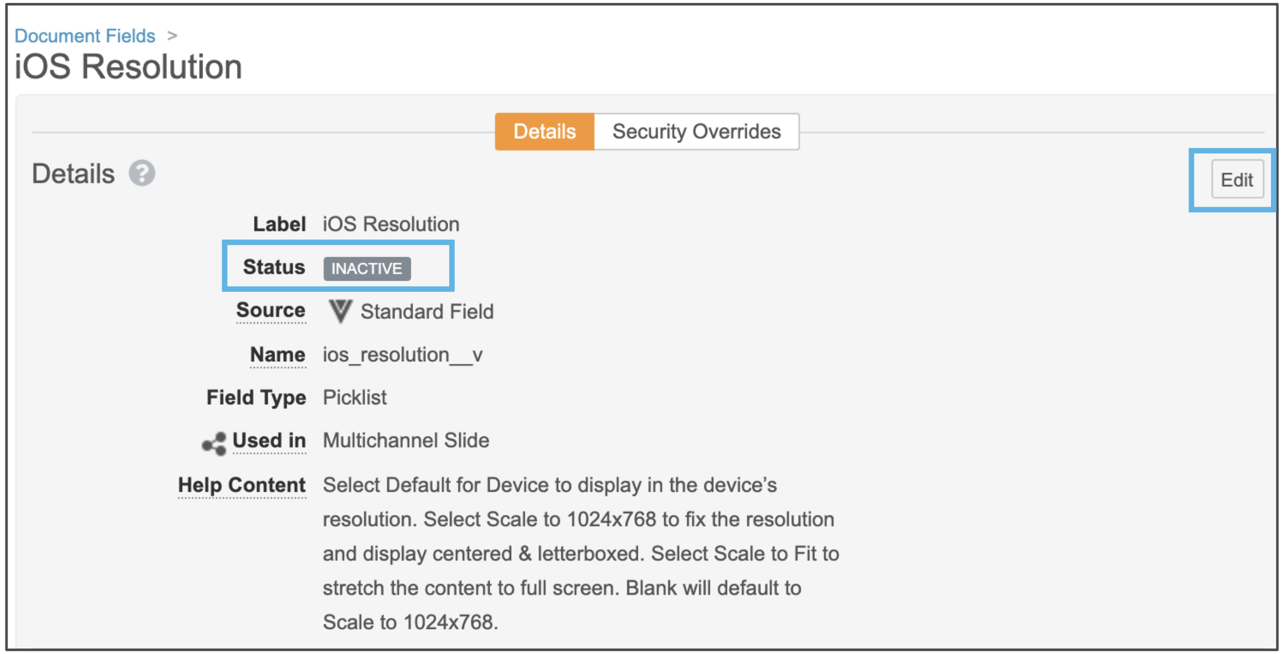
Default for Device displays in the device's native resolution

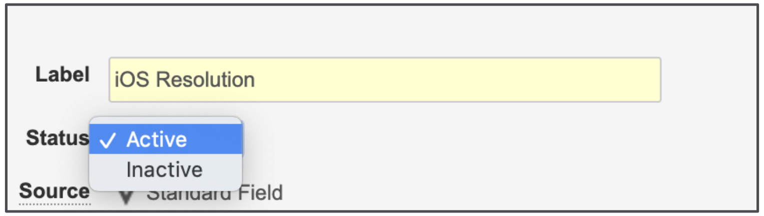
Scale to 1024×768 fixes the resolution and displays the content centered and letterboxed

Scale to Fit stretches the content to full screen

New Shared Field: iOS Resolution

- Considerations
  - If this field is not populated, Vault will default it to *Scale to 1024x768*
  - Consider creating responsive content going forward to allow for use of native resolution to optimize image quality
- Configuration
  - Admin > Configuration > Document Fields > Shared Fields > iOS Resolution
  - Edit > Status: Active > Save

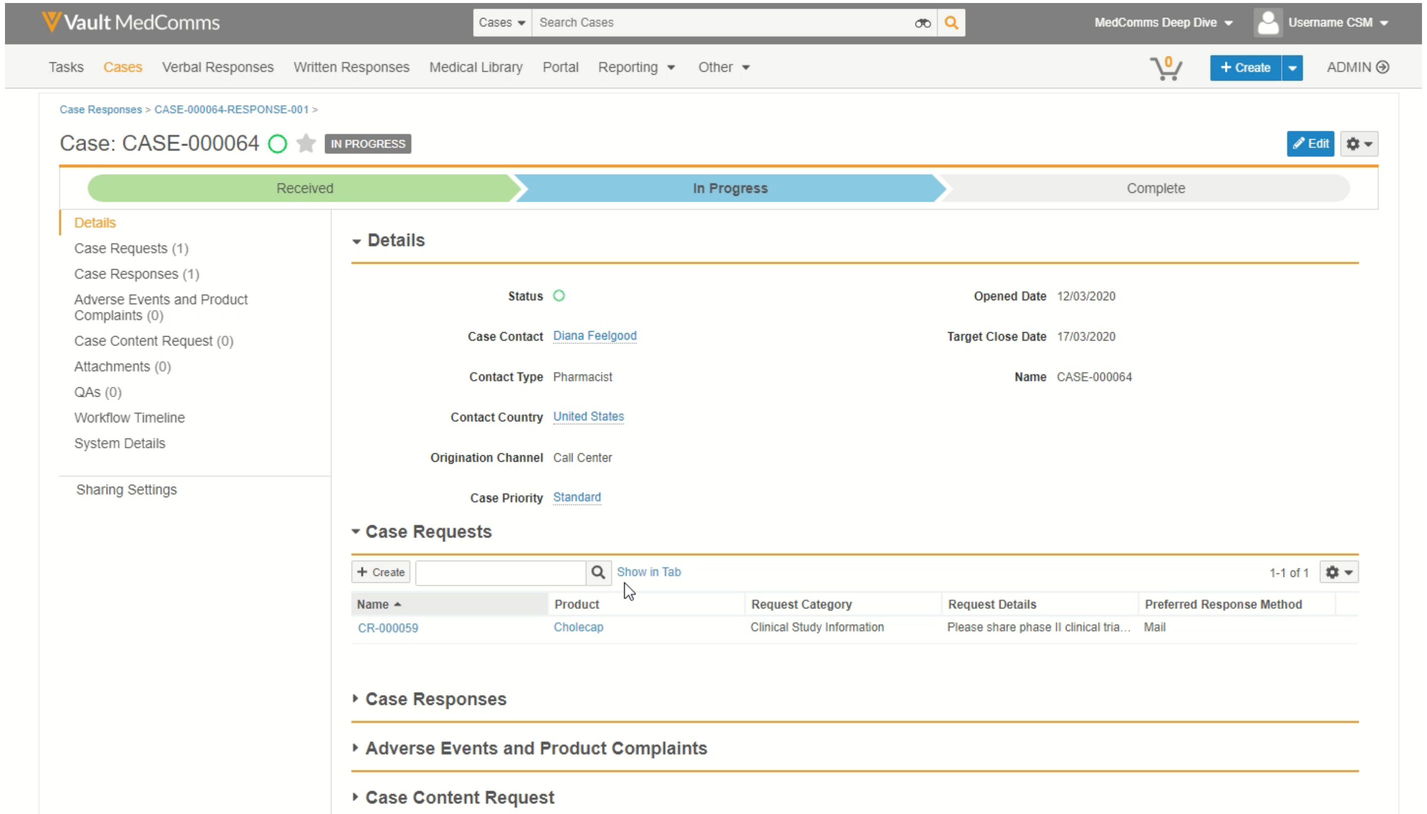




Objects

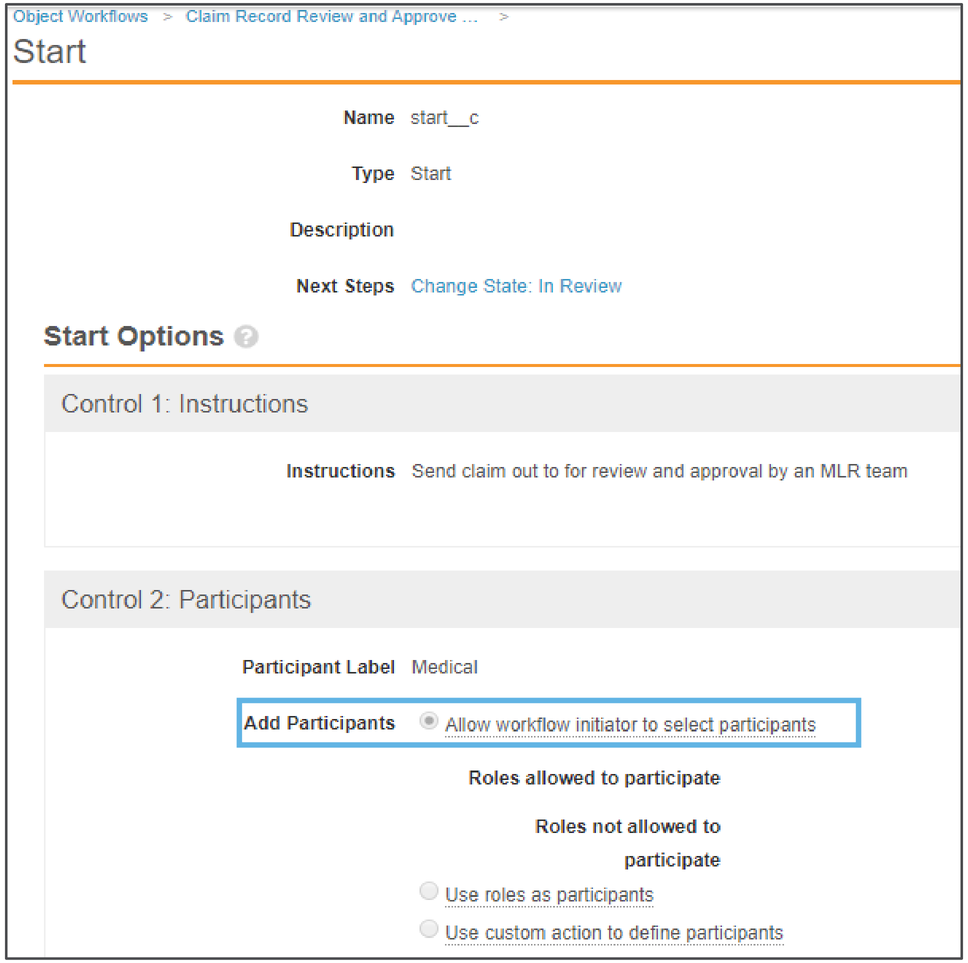
Display Custom Participant Group on Object Workflow Start Dialog

- Overview
  - The Object Workflow start dialog can now display the list of users in a participant group when selected by the workflow initiator
  - The participant group can also be expanded by clicking the plus (+) icon causing the group members to be treated as individual users that can be removed if needed



Display Custom Participant Group on Object Workflow Start Dialog

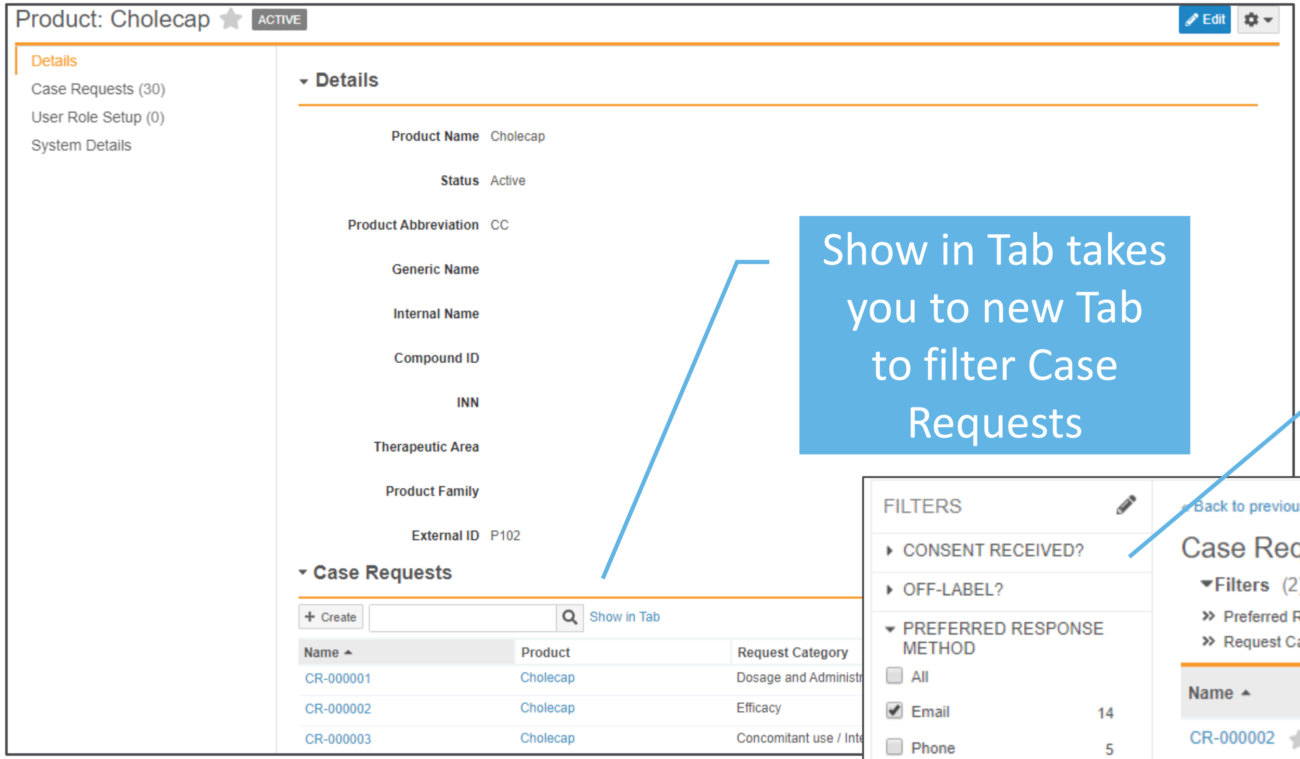
- Configuration
  - Admin > Configuration > Object Workflow > [Workflow] > Edit Start Step > Define Participant Control



Dynamic Tabs

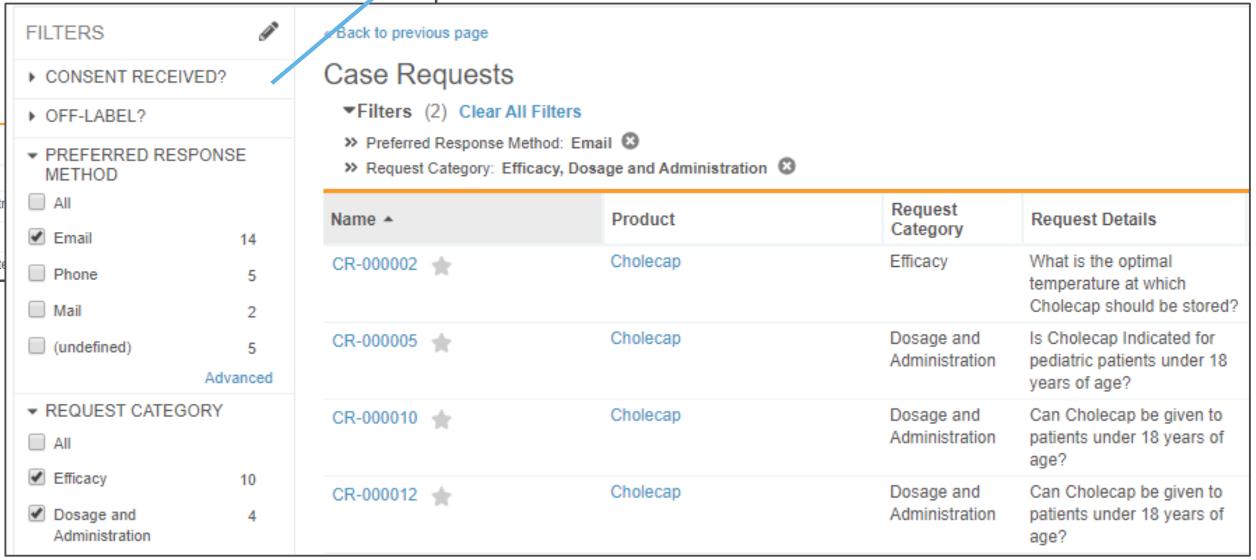
- Overview
  - All related record lists associated to an object will now have a Show in Tab link, minimizing the creation of multiple custom Tabs
  - Clicking Show in Tab on the object record list page will show the related list of records in a dynamically generated tab
- Considerations
  - The dynamic tab will open showing a list of records filtered for the originating object record
- Use Case
  - This feature gives users quick access to a dynamic record list which can be modified using the available filters

Dynamic Tabs



Show in Tab takes you to new Tab to filter Case Requests

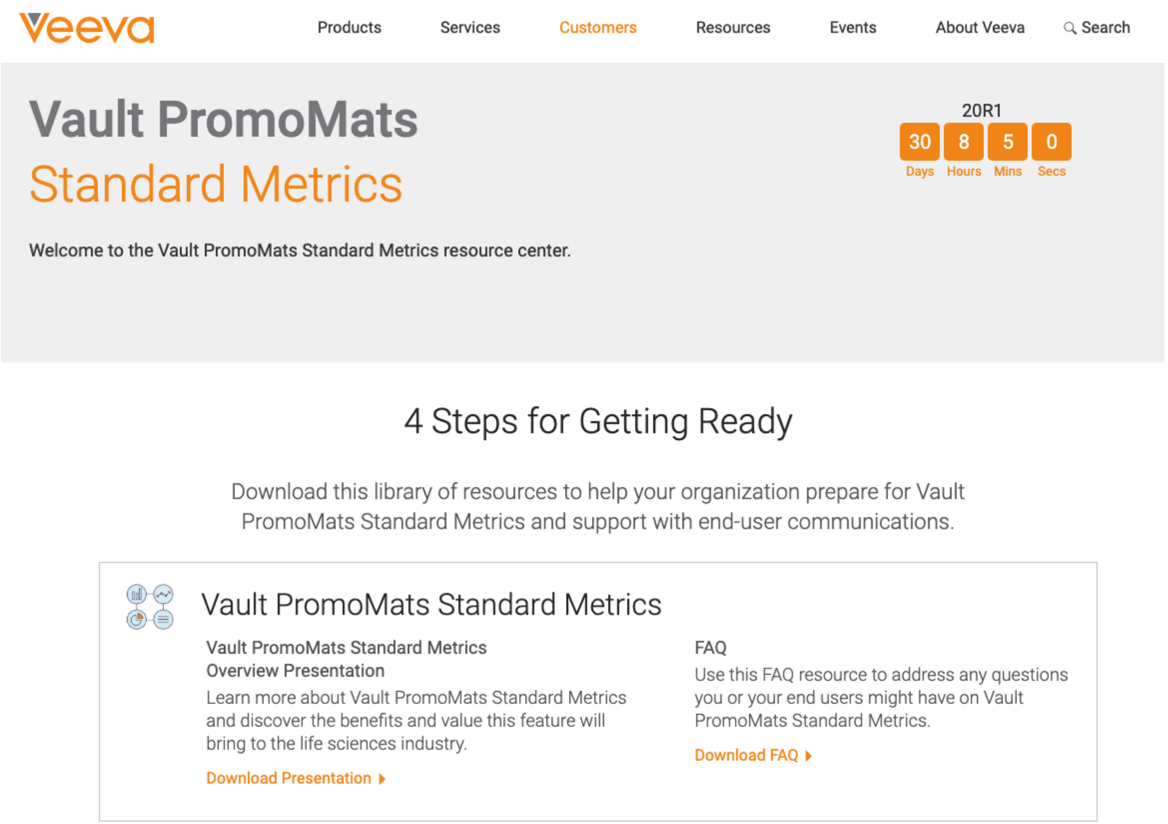
Use filters to show data you need



Appendix

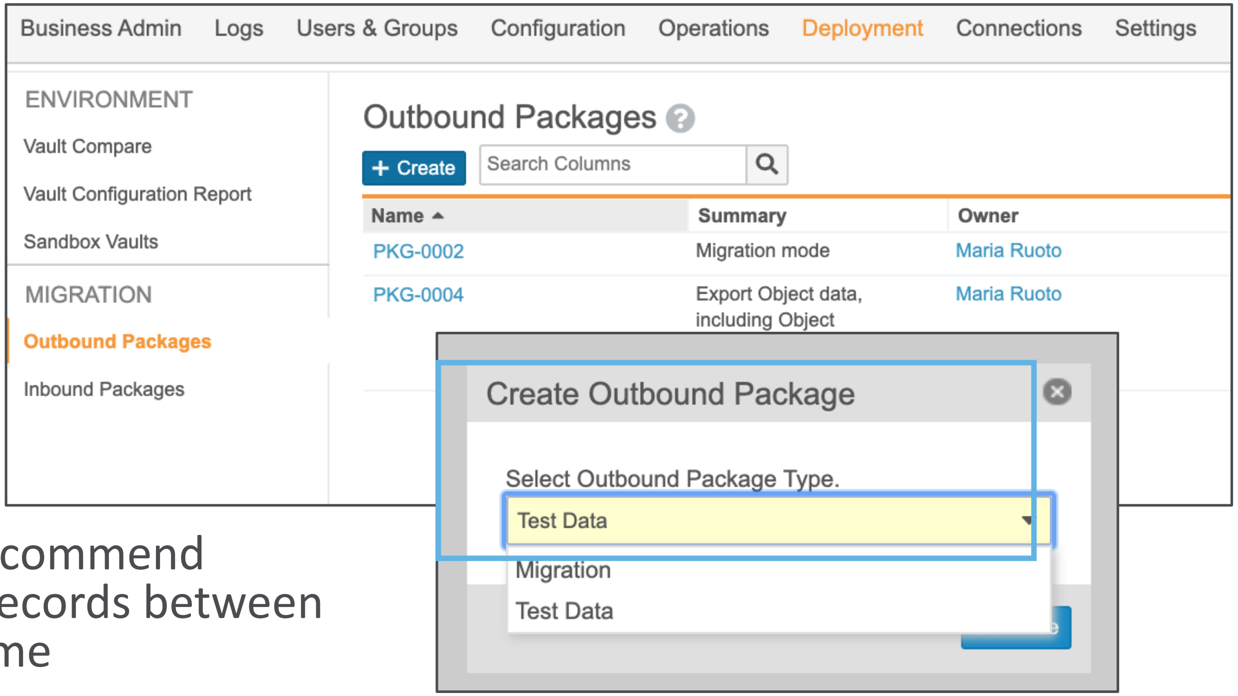
Standard Metrics

- Auto On for all PromoMats Vaults in 20R1 with the 3 user input fields non-mandatory
- In 20R2 the 3 user input fields will become mandatory
- Standard Metrics Hub: https://www.veeva.com/vault-promomats-standard-metrics
  - FAQs
  - Presentations
  - End-User communication packs
  - Configuration guides
  - Webinar recordings



Test Data Packages

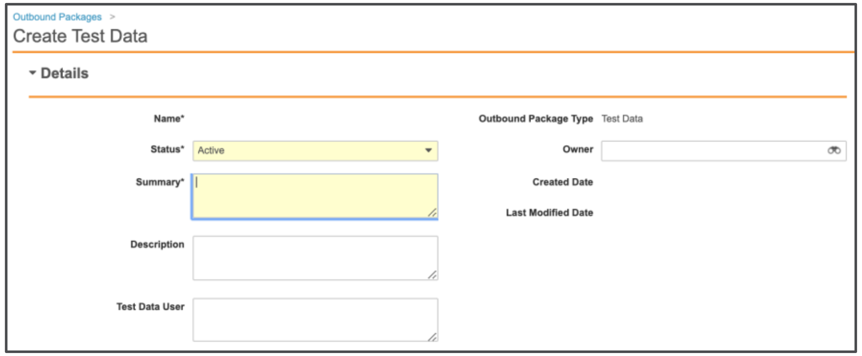
- Overview
  - This new Outbound Package type can be created to export Object records between two Vaults or to reload records into a Vault that has been refreshed
- Considerations
  - Test Data Packages contain only data
  - The Global ID and Link fields are leveraged to migrate data
  - Although the User Object is available in both Migration and Test Data Packages, we recommend using Vault Loader to extract and move user records between Vaults, since user data is unlikely to be the same

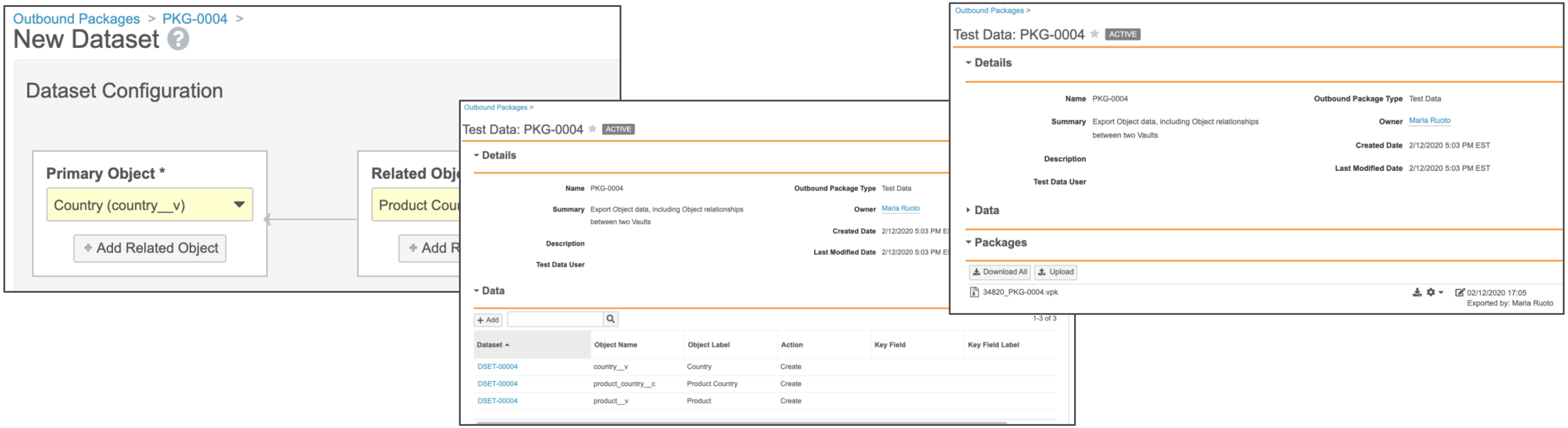


- Use Case
  - When refreshing a Sandbox Vault, Admins can create a Test Data package to export Object Records into a VPK and then load and deploy the VPK accordingly once the Sandbox Vault has been refreshed in order to preserve Object data and relationships

Test Data Packages

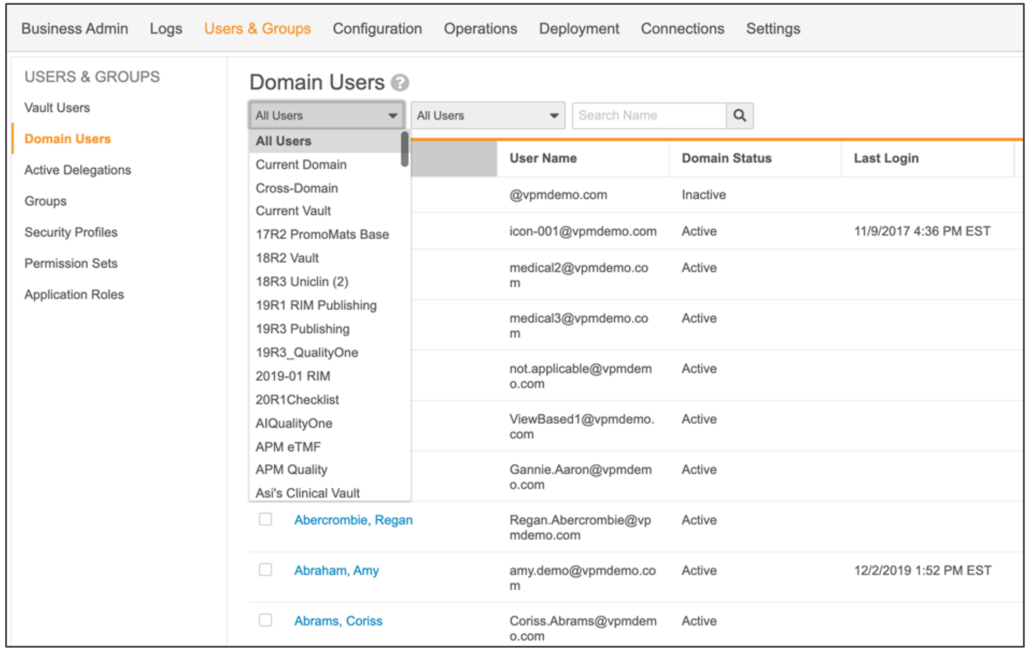
- Test Data Package Creation
  - Admin > Deployment > Outbound Packages > Create
    - Select Test Data as the Outbound Package Type
    - Enter Summary to help users understand the contents of the package
    - Add Dataset
    - Select Export from the action wheel to create the VPK package
    - Download the VPK package and import as needed





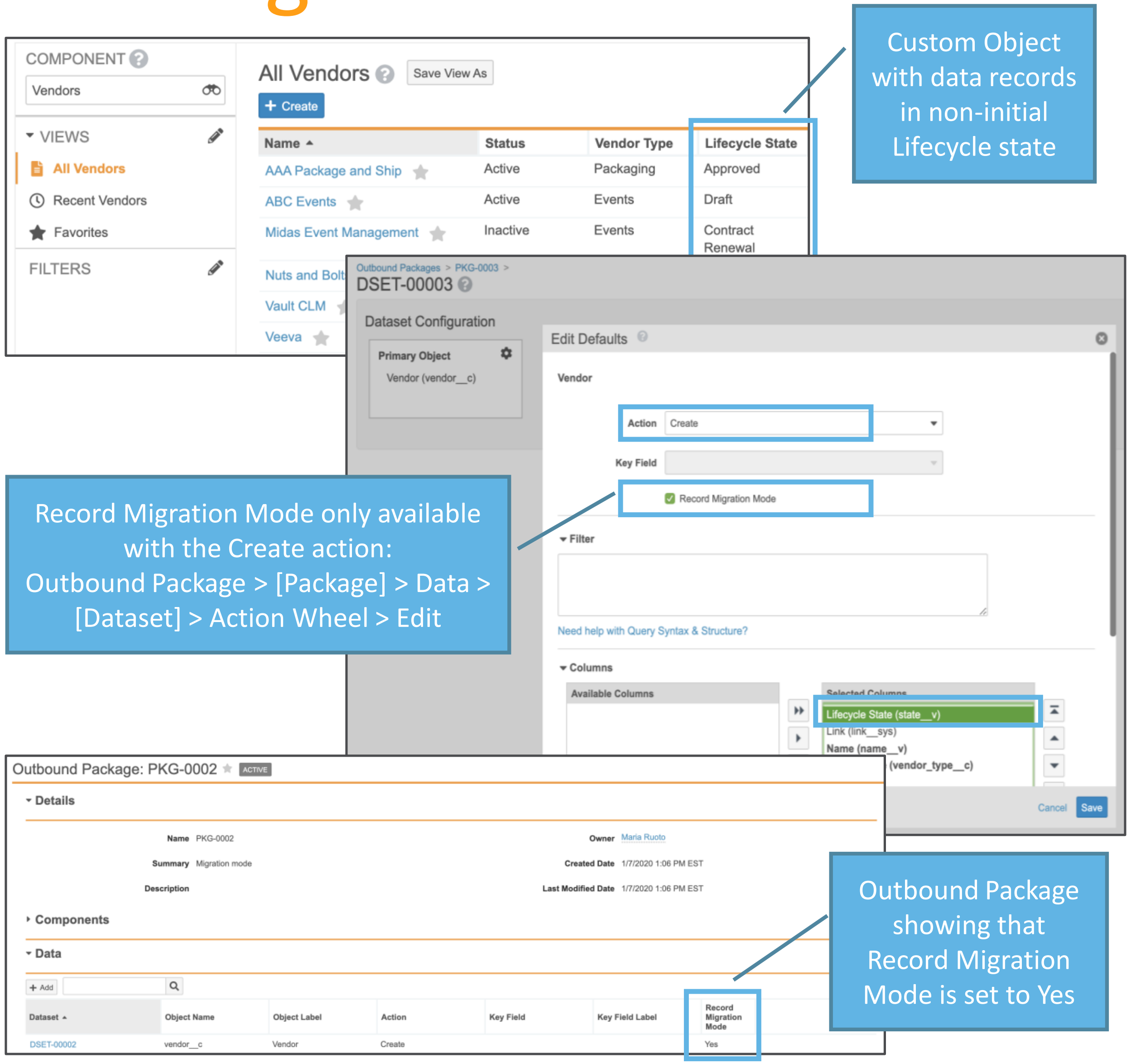
New Domain Admin UI

- Overview
  - Streamlines user management by allowing domain Admins to perform domain-specific tasks:
    - View and search domain users
    - Filter by Vault and Vault status
    - Export a list of domain users
    - View a Vault user’s domain-level fields
    - Manage Vault membership assignments across Vaults in the domain
    - Assign domain users to a Vault under a certain license type and security profile
    - Remove a user from current Vault memberships
  - Admins can edit user attributes for users not established in the current Vault
- Considerations
  - New Domain User page is read-only except for membership assignments across Vaults
  - Domain User Management requires the Domain Admin setting enabled



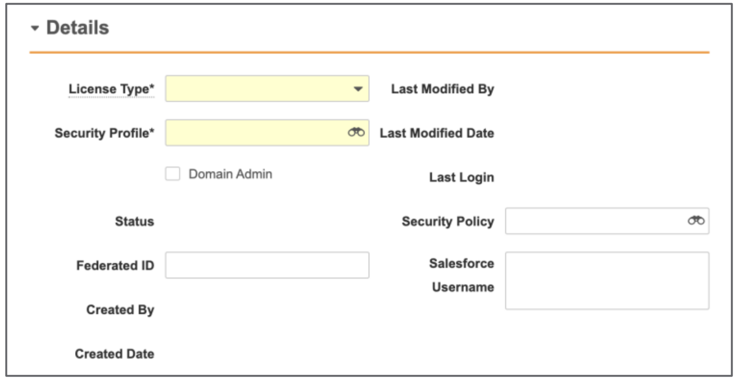
Record Migration Mode for Configuration Migration Packages

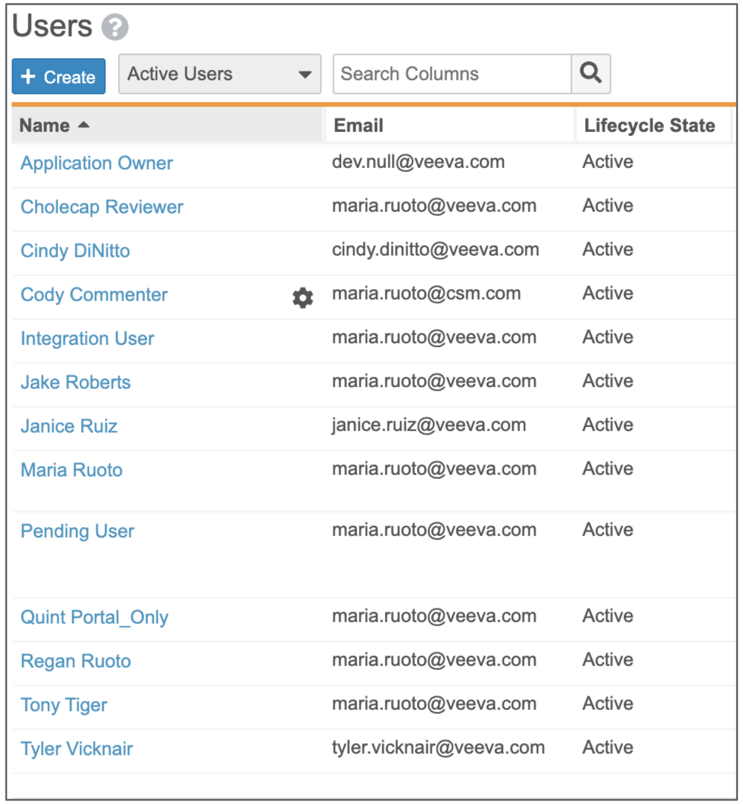
- Overview
  - Allow you to migrate Object records, with lifecycles, in a non-initial state to another Vault
- Considerations
  - Prior to this release the only way to create Object records in a non-initial lifecycle state was via Vault Loader
  - This functionality is only available when using the ‘Create’ action to migrate Object records
  - Learn more about [Configuration Migration Packages]
- Where to Find
  - Admin > Deployment > Outbound Packages



User Object Page Enhancements

- Overview
  - Allows Admins to perform a variety of enhanced capabilities on the Vault User and User Object page:
    - Filter users by lifecycle state on the **Vault Users** list page
    - Grants users with Portal-only Licenses in Clinical Operation Vaults access to a *Study Site Assignments* section
    - Modify the “Edit Localized Labels” field on the User Object page to support Vaults with multilingual labels enabled
    - Receive alerts when users have been locked out of Vault from failed login attempts
    - Notifications to update Security Profile when inputting user records
- Considerations
  - Only accessible to Admins





Multi-Pass Reporting: Ladder Scenario

- Overview
  - Admins may now create multi-pass reports that support more complex data models such as objects with multiple in-bound relationships
  - Date report type can be used in multi-pass reports to present activity timelines
  - Allows Admins to create and join reports with more options and flexibility

System Owned User Field

- Overview
  - A new System Owned User field appears on the User object to distinguish system-managed users, such as the Application Owner User, from your authenticated Vault users

- Considerations
  - In order to view the field, an Admin must add the field to be displayed on the object page layout

Eliminate Separation on Mid-Word Changes to Font Face, Size & Style

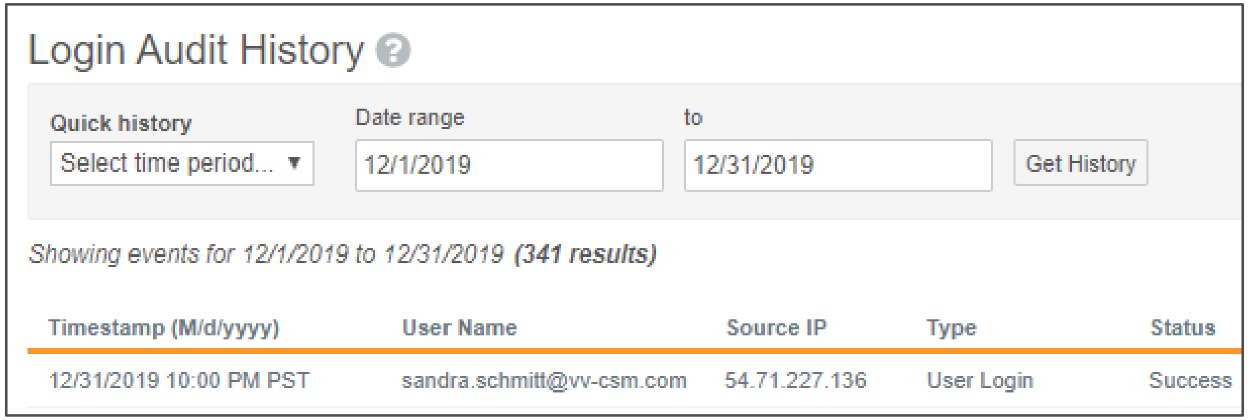
- Overview
  - Vault has made several minor updates to document text indexing in order to improve the efficacy of several features, including Auto Claims Linking, Bring Forward Annotations, and Find in Document. These include:
    - Vault no longer separates a single word into two words when it contains a change in font face, size or style
    - Combining characters no longer split words if they overlap with the character with which they are combining
    - Vault no longer always indexes a character as a distinct word just because it is on a different y plane than the previous character. Word separation is now restricted to very significant changes to y plane alignment.
    - “Bell” characters are dropped from text extraction because they’re sounds, not text
    - ETX control characters are counted as a space because they’re meant to signal the end of a block of text
- Considerations
  - Vault preserves the existing word indexing for already-indexed documents and applies the new indexing to any new, newly rendered, or re-rendered document versions
  - For re-rendered documents with existing annotations, Vault updates the annotation placement when annotations are preserved

Platform Data Model Changes

- Overview
  - With every release, we update the data model to better support evolving needs and new feature functionality. With this release, we've made the following changes to the Platform data model:
    - Added the Archived Date (*archived_date__sys*) DateTime document field to the Base document type, in the General doc info section
      - This field is special because it only displays in Doc Info if the field contains a value
      - This field is always assigned to Base document type
      - This field is provisioned in the General display section, but can be configured in Admin
      - This is a system managed field that Vault populates when a document is archived
    - Added the Unmodified source (*unmodified_source__sys*) Rendition Type
      - The new Unmodified Source Rendition Type is created in the database (in the *vcf_renditiontype* table), with the public key *unmodified_source__sys*
      - The Unmodified source (*unmodified_source__sys*) has been added to the base document type and is inherited by all document types
      - The Unmodified Source Rendition Type cannot be modified or deleted from the base document type.
      - The Unmodified Source Rendition Type is system managed, so it cannot be manually assigned by Admins or Users to a document, nor can it be assigned via the API
      - Unmodified Source rendition type is listed under Configuration > Document Setup > Rendition Types

Expand Time Period for Login Audit Logs

- Overview
  - Admin users will be able to view login history for any desired date range
  - The previous restriction of audit history only allowed admins to view the last two weeks
- Considerations
  - The dropdown also includes quick-select options



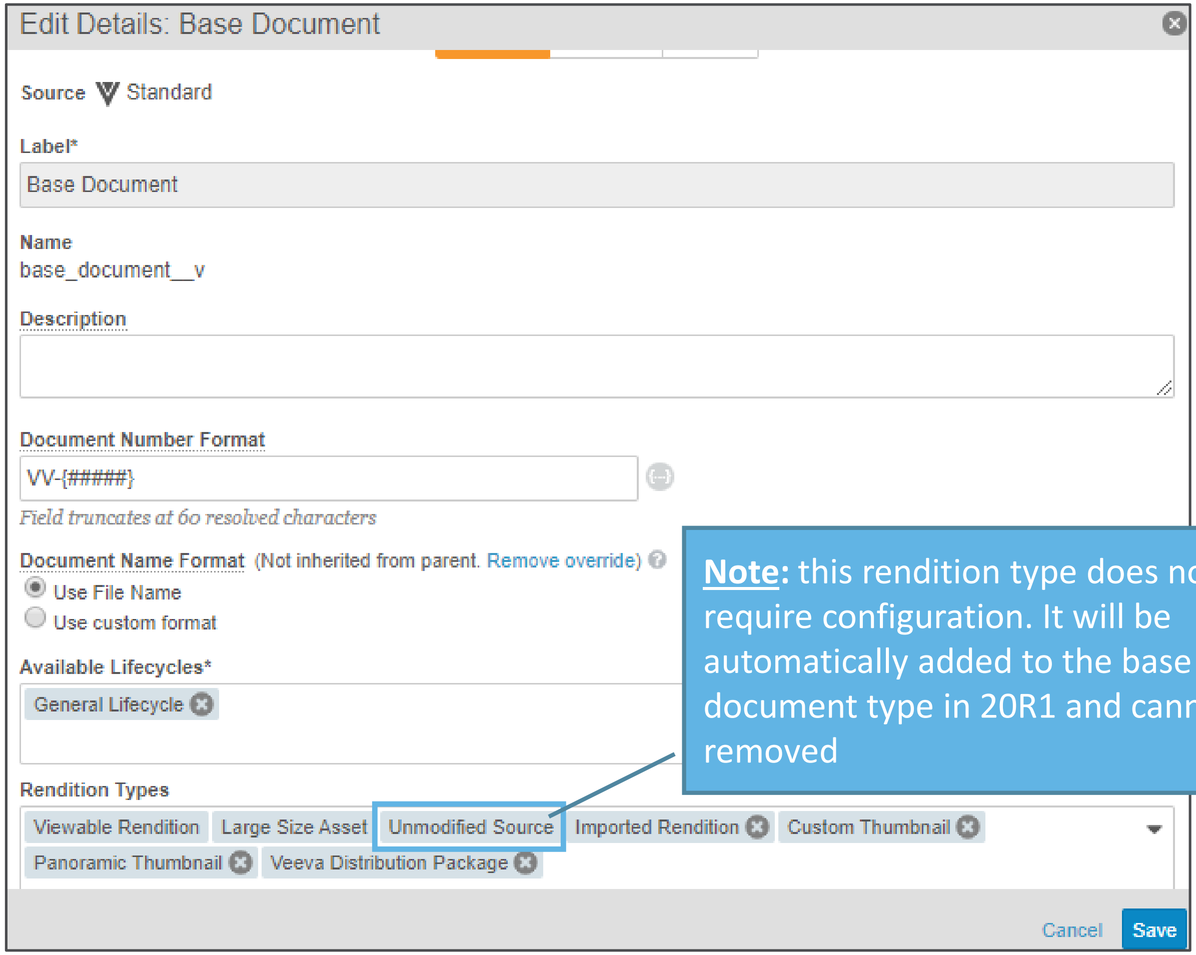
- Where to Find
  - Admin > Logs > Login Audit History

Unmodified Source Rendition Type for Modified Vault Documents

- Overview
  - This feature provides the ability to download the unmodified source files that are made available when Vault makes changes to the Source Document via Merge Fields, RIM Dynamic Linking, and RIM's create ToC for Content Plan items
- Considerations
  - Unmodified Source is made available once per version when the document is first modified
  - The Unmodified Source file is only visible to Vault Owners with the Vault Owner Action for All Document Actions
  - Available for modified documents rendered after 20R1 and going forward
  - The new Unmodified Source (unmodified_source__sys) is added to the base document type
- Use Case
  - Organizations can leverage the Unmodified Source files for sanity-checking or file restoration

Unmodified Source Rendition Type for Modified Vault Documents

- Configuration
  - Admin > Configuration > Document Types > [Base Document] > Rendition Types



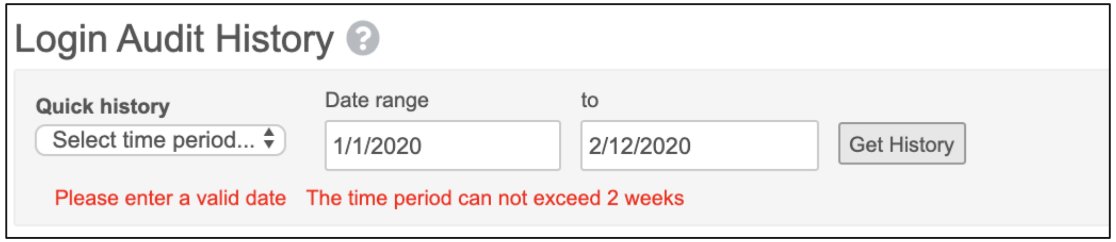
Note: this rendition type does not require configuration. It will be automatically added to the base document type in 20R1 and cannot be removed

Vault ID Filter for Login Audit History

- Overview
  - Allows Admins to filter the Login Audit History indefinitely using Vault IDs.
- Considerations
  - Can only filter through one Vault
  - Timespan is indefinite
  - Accessible only to Admins
- How to Filter Login Audit History
  - Admin > Logs > Login Audit History
    - Filter by Vault ID and select apply

Timestamp (M/d/yyyy)	User Name	Source IP	Type	Status	Browser	Platform	Vault ID
2/18/2020 7:41 AM PST	tyler.vicknair@vv-csm.com	12.48.56.195	Vault Authentication	Success	Chrome 80.0.3987.100	Intel Mac OS X 10.14.6	3012
2/18/2020 7:37 AM PST	leo.lau@vv-csm.com	24.80.37.110	User Login	Invalid Password	Chrome 79.0.3945.117	Intel Mac OS X 10.15.2	
2/18/2020 7:37 AM PST	leo.lau@vv-csm.com	24.80.37.110	User Login	Invalid Password	Chrome 79.0.3945.117	Intel Mac OS X 10.15.2	
2/18/2020 7:24 AM PST	maria.ruoto@vv-csm.com	54.71.227.136	User Login	Success	Unknown	Unknown	3012
2/18/2020 7:24 AM PST	maria.ruoto@vv-csm.com	54.71.227.136	User Login	Success	Unknown	Unknown	3012

Before: Date ranges were limited.



After: Date range is omitted with ability to filter by Vault ID indefinitely.

Minor Enhancements

Truncate Long URLs on Internet Explorer

On Internet Explorer™ browsers, Vault now shortens URLs that contain more than 2,000 characters. This can happen when users search for documents or object records using many filters or when the grid view displays a large number of columns.

New OCR Limits

This feature improves usability and supportability of the OCR (Optical Character Recognition) rendering feature by clearly defining maximum default limits for documents to be processed for OCR. These new limits include a maximum number of pages for PDF and TIFF files, as well as maximum file sizes for all documents that support OCR.

Localize Vault to Dutch

Veeva Vault UI now supports Dutch for customers that request it through Veeva Support. Users can update the language Vault displays for them by changing the language settings on the User Profile page. Vault also supports setting Dutch translations for labels in user-configurable data such as document types, fields, picklist values, and lifecycle names.

New Functions and state__v Support

This feature introduces the following new functions to Vault Formulas:

- Power()
- Sum()
- Average()
- StartOfDay()

This feature also enhances the existing Today() function to accept an optional timezone parameter.

Additionally, this feature allows Vault Formulas to access the name of a lifecycle state with state__v . Previously, formulas could only access the label with Text(state__v).

Eliminate Separation on Mid-Word Changes to Font Face, Size & Style

Vault has made several minor updates to document text indexing in order to improve the efficacy of several features, including Auto Claims Linking, Bring Forward Annotations, and Find in Document.

Document Archive Changes: Merge Fields, CrossLinks, & Archive Date Field

This feature introduces changes to how Vault handles documents when users archive them:

- When archiving a document with Merge Fields, Vault automatically sets the Merge Fields document field value from Yes to No. If the field value is blank, it will stay blank.
- When archiving a CrossLink document, Vault automatically sets the version binding to version-specific, locking it to the current latest version of the source document.
- The new Archived Date field updates time a document enters the archive.

Thank you