

Veeva Commercial Vault 20R1 Deep Dive

MedComms 20R1





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Agenda



Auto-On Features



Configurable Features



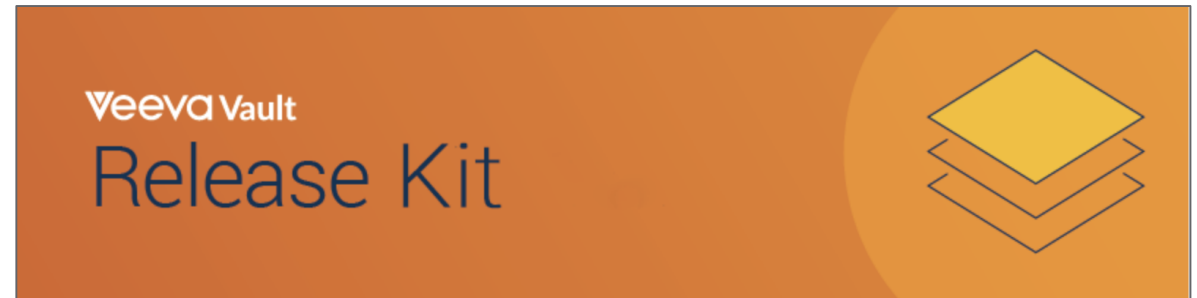
Admin Features



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

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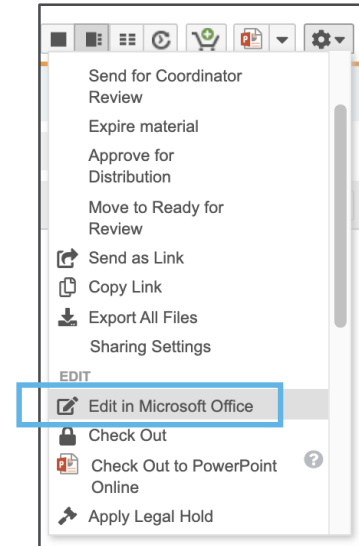


Auto-on Features

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

- Overview

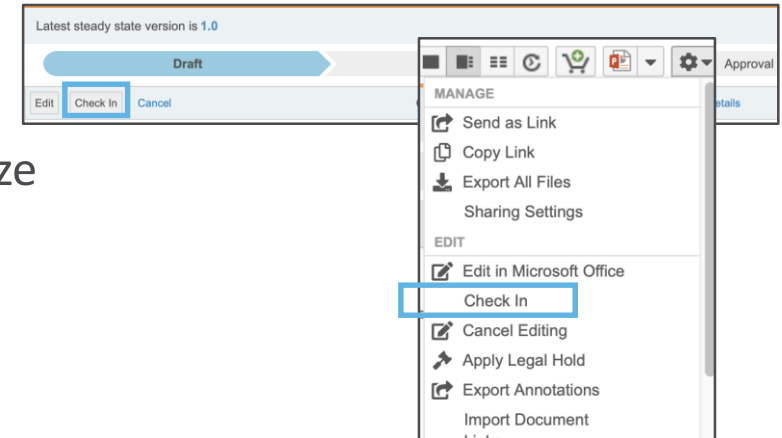
- Collaborative Authoring now supports checking out and editing Microsoft PowerPoint (.pptx) and Excel (.xlsx) files in addition to Word (.docx) files
- The number of clicks required to check-out or edit a document from Vault has been reduced
- A new option 'Edit in Microsoft Office' is available in 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

ADVANCED OPTIONS

Excel Template ?

Sample

Upload

☒ Fit PDF export columns to one page

Medical Inquiry: Cases by Month and Origination Channel ★										
PROPERTIES										
Report Type Case with Case Contact										
FILTERS (0)										
Expand all Collapse all										
Case (53)									Person (53)	
Name	Status	Case Contact	Origination Channel	Case Priority	Opened Date	Target Close Date	Closed Date	Total Days to Close	Name	Contact Type
Opened Date (Month): 2019 Jan (2)										
Origination Channel: Call Center (1)										
CASE-000017	✓	Michael Sandberg	Call Center	Standard	22/01/2019	27/01/2019	22/01/2019	0	Michael Sandberg	Health Care Practitioner
Origination Channel: Email (1)										
CASE-000026	✓	Michael Sandberg	Email	Standard	07/01/2019	12/01/2019	08/01/2019	1	Michael Sandberg	Health Care Practitioner

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

<i>Claim</i>
Cholecap is the only drug that can lower triglycerides by 21% - 42%
<i>Supporting References</i>
<ol style="list-style-type: none">1. Role of Atorvastatin in Dyslipidemia - A Clinical Study. Med Educ. 2005; 89: 548-5492. 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
<i>Usage Notes</i>
<ul style="list-style-type: none">• Full ISI & Link to the PI must be presented within visual proximity of statement¹
<div><div>1</div><div>Current PI can always be found in PromoMats</div></div>

Navigate External Bookmarks

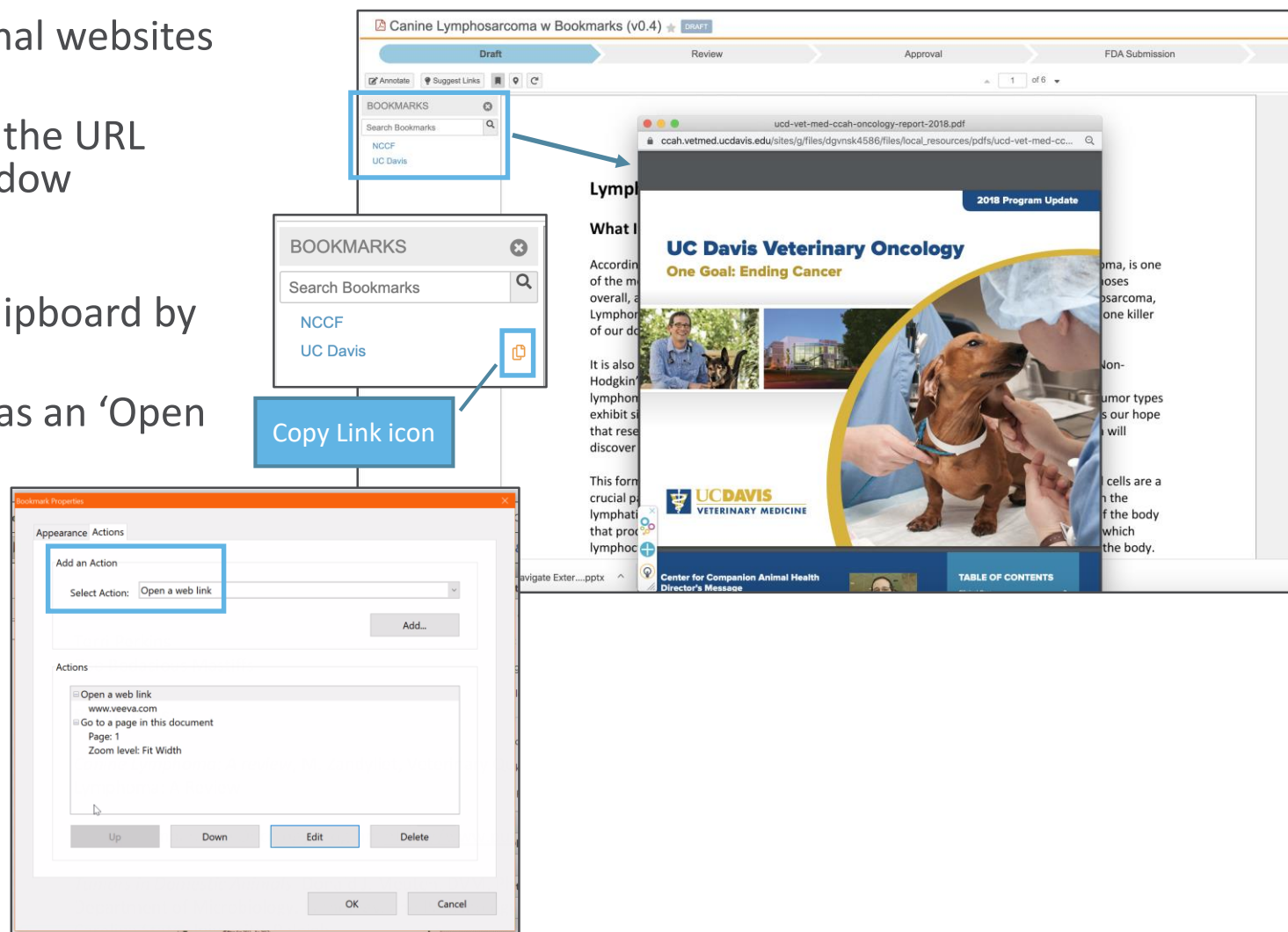


- Overview

- 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

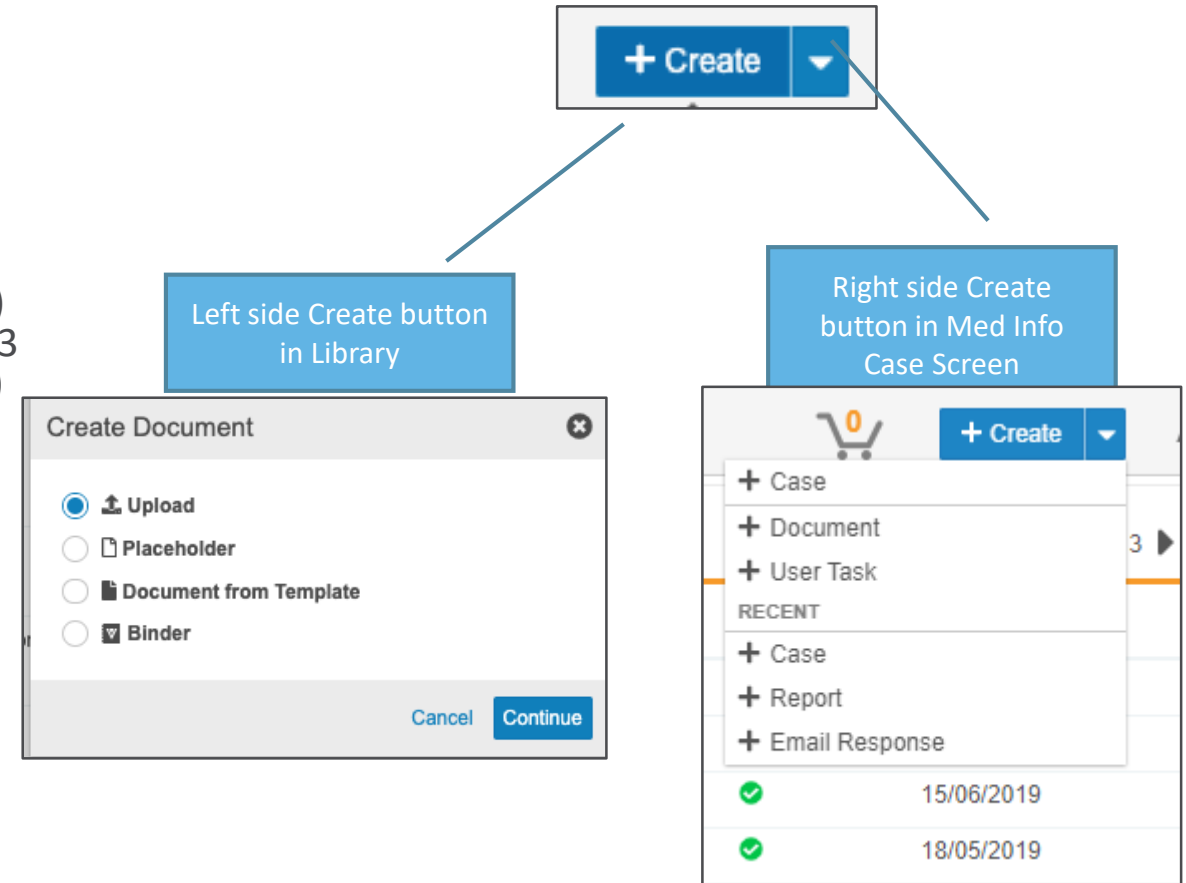
- Overview

- 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

Case: CASE-000042 ✓ ★ CLOSED Edit ⚙

Received In Progress Complete

Details

- Case Requests (1)
- Case Responses (1)
- Adverse Events and Product Complaints (0)
- Case Content Request (0)
- Attachments (0)
- QAs (0)
- Workflow Timeline
- System Details
- Sharing Settings

▼ Details

Status ✓ Opened Date 26/09/2019

Case Contact [John Difilippo](#) Target Close Date 01/10/2019

Contact Type Health Care Practitioner Total Days to Close 0

Contact Country [United Kingdom](#) Name CASE-000042

Origination Channel Call Center

Case Priority [Standard](#)

▼ Case Requests

20R1

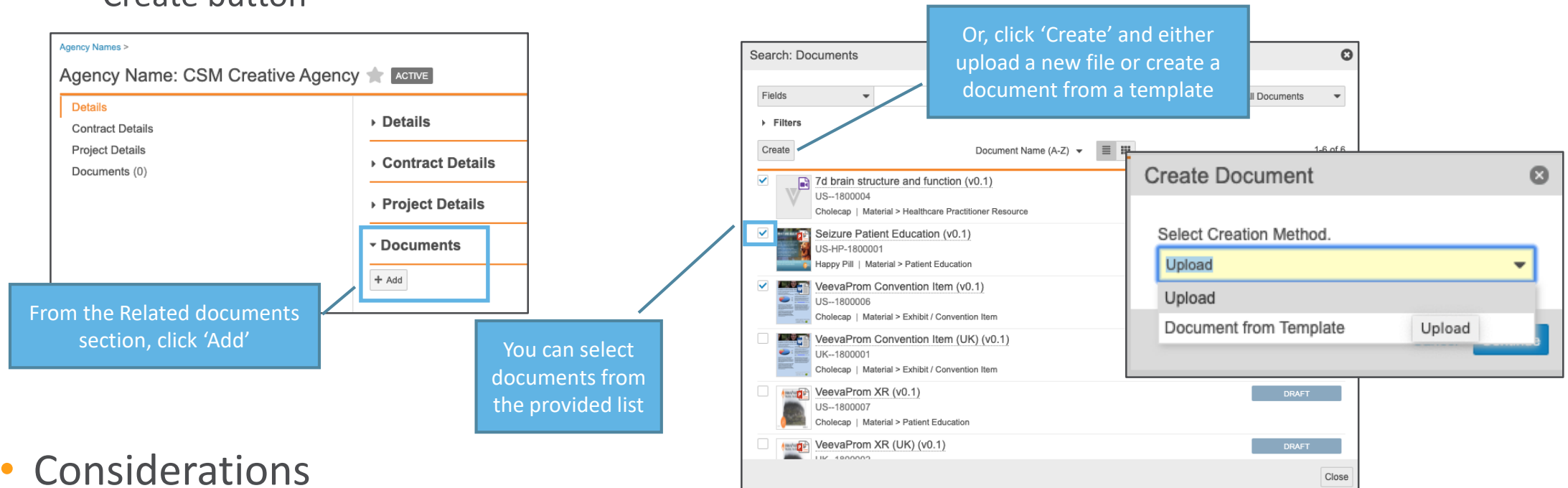
Search Show in Tab 1-1 of 1 ⚙

Name	Product	Request Category	Request Details	Preferred Re:
CR-000041	Cholecap	Approved Use	Can Cholecap be given to patient...	Phone

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

Create Document

Select Creation Method.

Upload

Document from Template

Upload

DRAFT

Close

- 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

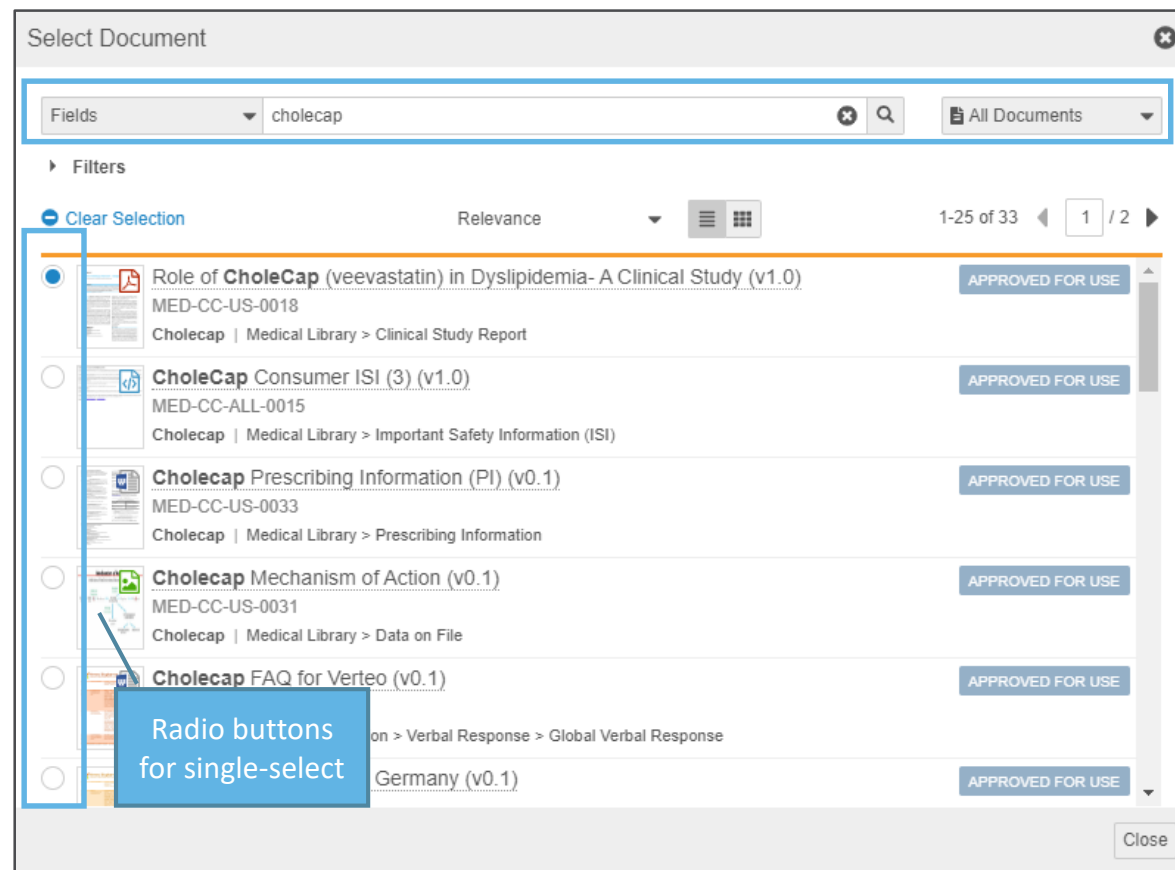


- Overview

- 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

Review

Review product details and provide disposition

Reason

Verdict*

☒ Approved

☐ Rejected

Additional Information*

All Required information is here.

*Required to proceed

Cancel Complete

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

Object Workflow with Task Comments ★

▼ PROPERTIES

Report Type Workflow with New Product

► FILTERS (0)

Workflow (5)				
Workflow Name	Workflow Owner	Workflow Status	Workflow Start Date	Task Verdict Comment
New Product	Maria Ruoto	Complete	1/3/2020 11:14 PM EST	Logo also approved.
New Product	Maria Ruoto	Cancelled	1/4/2020 12:14 AM EST	
New Product	Maria Ruoto	Cancelled	1/4/2020 12:14 AM EST	
New Product	Maria Ruoto	Cancelled	1/6/2020 1:19 PM EST	
New Product	Maria Ruoto	Complete	1/6/2020 1:21 PM EST	All Required information is here.

Edit Columns to Display

Search:

Available Columns

Workflow

Action

Task Assignment Date

Task Cancellation Date

Task Capacity

Task Comment

Task Creation Date

Task Duration

Task Last Modified Date

Task Owner

Task Queue Group

Task Reason Code

Task Verdict

Workflow Cancellation Date

Workflow Completion Date

Workflow Count (fx)

Workflow Due Date

Displayed Columns

Workflow

Workflow Name

Workflow Owner

Workflow Status

Workflow Start Date

Task Verdict Comment

Task Completed By

Task Completion Date

Task Due Date

Task Name

Task Status

New Product

Name

Cancel OK

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

Verdicts

Verdict Label*

Approved

✕

☐ Short-circuit tasks with the configured tags.

Prompt for Comments

✕

Additional Information

☒ Required

[+ Add eSignature](#)

[+ Add Reasons](#)

[+ Add Field Prompts](#)

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

Picklists > Report Tags ?

Details

Label: Report Tags

Name: report_tags__sys

Source: System Picklist ▼

Used in: Report > Tags (tags__sys)

Picklist values

Picklist Value Label	Picklist Value Name	Picklist Value Status
Inactive Report Tag Value	inactive_report_tag_value__c	Inactive
KPI	kpi__c	Active
Process Optimization	process_optimization__c	Active

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

FILTERS

▶ RUNS AS

▼ TAGS

in

Administration

Claims

Compliance

Content Reuse

Cycle Time

Inactive Report Tag V...

KPI

Number of Cycles

Process Optimization

Productivity

References

Rights Management

Time to Approve

User Task

FILTERS

▶ RUNS AS

▼ TAGS

☒ All

☐ User Task 6

☐ Content Reuse 4

☐ Cycle Time 4

☐ KPI 2

☐ Productivity 2

☐ References 2

☐ Rights Management 2

☐ Administration 1

☐ Claims 1

☐ Inactive Report Tag Value 1

☐ Number of Cycles 1

☐ Time to Approve 1

Advanced

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

FILTERS

▶ RUNS AS

▼ TAGS

in

Administration

Claims

Compliance

Content Reuse

Cycle Time

KPI

Number of Cycles

Process Optimization

Productivity

References

Rights Management

Time to Approve

User Task

Users

FILTERS

▶ RUNS AS

▼ TAGS

☒ All

☐ User Task 6

☐ Content Reuse 4

☐ Cycle Time 4

☐ KPI 2

☐ Productivity 2

☐ References 2

☐ Rights Management 2

☐ Administration 1

☐ Claims 1

☐ Number of Cycles 1

☐ Time to Approve 1

☐ (undefined) 25

- 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

Tasks Library Claims References **Reports** Dashboards Admin Tools Portal Multichannel Loader CRM Publishing Last Login Approved Images

« Back to reports

Workflow Workday Duration

PROPERTIES

Report Type Workflow with Document

CONDITIONAL FIELDS

FILTERS (optional)

Select Field

PROMPTS (optional)

Workflow Name	Workflow Owner	Workflow Start Date	Workflow Completion Date	Document Name

Group rows by Select Field

Add field to group by (optional)

ADVANCED OPTIONS

Excel Template

Sample Upload

Fit PDF export columns to one page

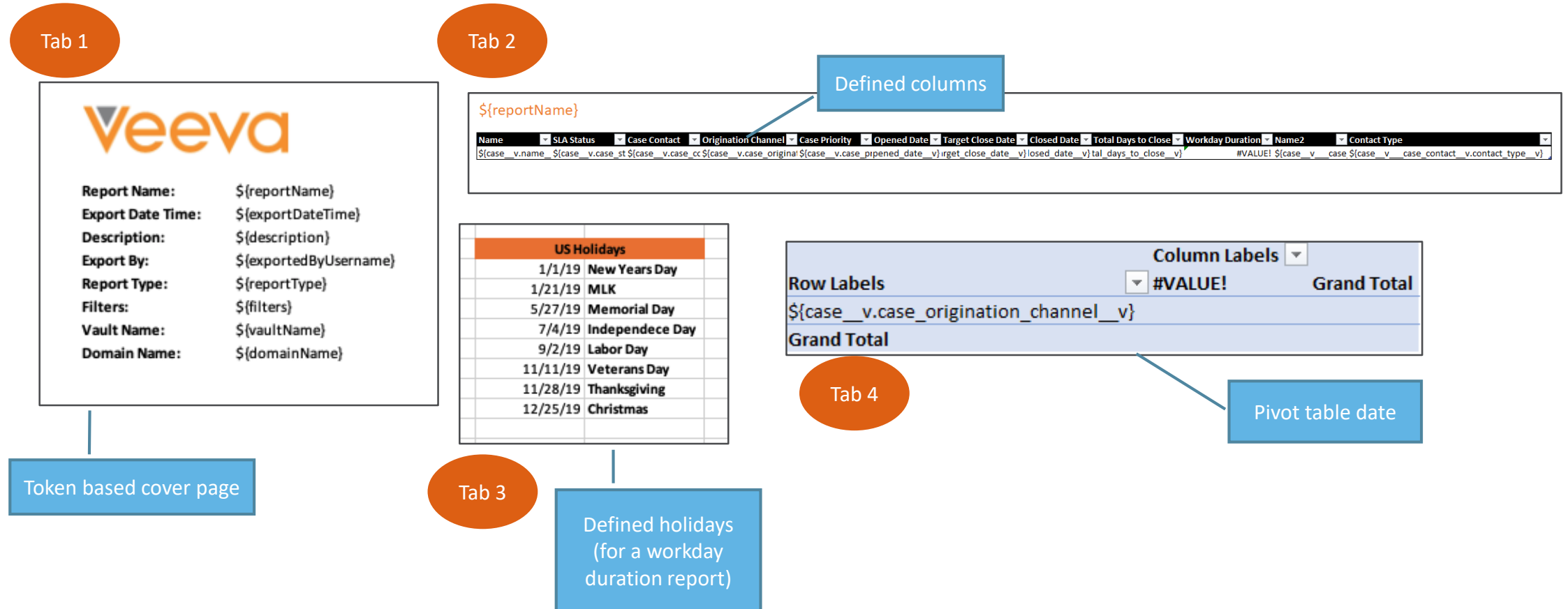
Upload the updated Excel template

Download the report's sample template and customize as desired



Excel Templates for Reports

- Example: Excel template





Excel Templates for Reports

- Example: Excel export results

MANAGE

Schedule Flash Report

Start Multi...

EDIT

Copy Rec...

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=ched	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=ched	Karen Benson	Email	Standard	5/13/2019	5/18/2019	5/14/2019	1	1	Karen Benson	Health Care Practitioner
CASE-000003	icon_name=ched	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=ched	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=ched	Karen Benson	Email	Urgent	6/11/2019	6/12/2019	6/12/2019	1	1	Karen Benson	Health Care Practitioner
CASE-000007	icon_name=ched	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=ched	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=ched	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=ched	Anthony Lucator	Email	Standard	6/11/2019	6/16/2019	6/12/2019	1	1	Anthony Lucator	Health Care Practitioner
CASE-000012	icon_name=ched	Martina Bernarde	Email	Standard	7/3/2019	7/8/2019	7/4/2019	1	0	Martina Bernarde	Health Care Practitioner
CASE-000013	icon_name=ched	Sabrina Schimdt	Email	Standard	7/3/2019	7/8/2019	7/5/2019	2	1	Sabrina Schimdt	Health Care Practitioner
CASE-000014	icon_name=ched	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=ched	Sabrina Schimdt	Email	Standard	7/3/2019	7/8/2019	7/5/2019	2	2	Sabrina Schimdt	Health Care Practitioner
CASE-000017	icon_name=ched	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=ched	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=ched	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=ched	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=ched	Martina Bernarde	Email	Standard	12/13/2018	12/18/2018	12/17/2018	4	2	Martina Bernarde	Health Care Practitioner
CASE-000022	icon_name=ched	Yoonjoo Kim	Email	Standard	10/22/2018	10/27/2018	10/23/2018	1	1	Yoonjoo Kim	Health Care Practitioner
CASE-000023	icon_name=ched	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=ched	Mark Sweeney	Call Center	Standard	9/21/2018	9/26/2018	9/21/2018	0	0	Mark Sweeney	Health Care Practitioner
CASE-000025	icon_name=ched	Frederic Girard	Call Center	Standard	2/7/2019	2/12/2019	2/7/2019	0	0	Frederic Girard	Health Care Practitioner
CASE-000026	icon_name=ched	Michael Sandberg	Email	Standard	1/7/2019	1/12/2019	1/8/2019	0	0	Michael Sandberg	Health Care Practitioner
CASE-000027	icon_name=ched	Johanne Mordhor	Web Form	Standard	2/26/2019	3/3/2019	2/28/2019	0	0	Johanne Mordhor	Health Care Practitioner
CASE-000028	icon_name=ched	John Difilippo	Call Center	Standard	7/31/2019	8/5/2019	7/31/2019	0	0	John Difilippo	Health Care Practitioner
CASE-000029	icon_name=ched	Sabrina Schimdt	Email	Standard	7/31/2019	8/5/2019	8/2/2019	0	0	Sabrina Schimdt	Health Care Practitioner
CASE-000030	icon_name=ched	Alex Troncosco	Email	Standard	8/5/2019	8/10/2019	8/6/2019	0	0	Alex Troncosco	Health Care Practitioner
CASE-000033	icon_name=ched	Mark Sweeney	Email	Standard	8/5/2019	8/10/2019	8/5/2019	0	0	Mark Sweeney	Health Care Practitioner
CASE-000035	icon_name=ched	Christine Schneid	Email	Standard	9/17/2019	9/22/2019	11/12/2019	0	0	Christine Schneid	Health Care Practitioner
CASE-000036	icon_name=ched	Martina Bernarde	Call Center	Standard	9/9/2019	9/14/2019	9/11/2019	0	0	Martina Bernarde	Health Care Practitioner
CASE-000037	icon_name=ched	John Difilippo	Call Center	Standard	9/17/2019	9/22/2019	9/17/2019	0	0	John Difilippo	Health Care Practitioner
CASE-000038	icon_name=ched	Anthony Lucator	Email	Standard	9/17/2019	9/22/2019	9/17/2019	0	0	Anthony Lucator	Health Care Practitioner
CASE-000039	icon_name=ched	John Difilippo	Call Center	Standard	9/20/2019	9/25/2019	9/20/2019	0	0	John Difilippo	Health Care Practitioner

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

Start Multi-document Workflow

Description*

Med Info Fulfilment Document Approval - 18/03/2020

☒ Medical Reviewer*

Medical Information Documents-Medical

☐ Regulatory Reviewer

*Required to proceed

Cancel Start



Object & MDW: Optional Tasks

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

Regulatory Review

Details

Label*

Regulatory Review

Name*

regulatory_review

__c

Type*

Document Task

Description

Next Steps

Join

Document Task Options

General Settings

Task Label*

Regulatory Review

Assign Task To*

Regulatory Reviewer

☒ Assign to all users in participant group

☐ Make available to users in participant group

Instructions*

Please review and provide verdict.

Task Requirement*

Optional

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

The screenshot displays the Veeva MDW interface. The top section shows the workflow title "Med Info Fulfilment Document Approval - 18/03/2020" with an "ACTIVE" status. Below this, a timeline view shows a "Medical Review" task on 23/03/2020. A blue callout box points to the task controls in the timeline, stating: "Workflow Participant and Task controls are accessed from the Timeline view". The controls include a gear icon, a green play button, and a dropdown menu with options: "+ Add Participants" and "x Cancel Workflow".

The bottom section shows the "DETAILS" view for the "Medical Review" task. It displays the task name, a user icon, "Username CSM", and "Due: 23/03/2020". A blue callout box points to the task controls in the details view, which include a gear icon, a "Reassign" button, and a "x Cancel Task" button.

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

Reference MDW - 2/13/2020 **ACTIVE**

Medical Review [Show more](#)

All Documents 1-3 of 3 **Clinical evaluation of belicoxib and carprofen for the treatment of dogs with osteoarthritis, Polme (v0.1)**

The effects of belicoxib (Osteocox) in geriatric dogs over a period of 90 days, Joubert KE. (v0.1)

Comparison of belicoxib and phenylbutazone in dogs with naturally occurring osteoarthritis, Doucet, (v0.1)

Clinical evaluation of belicoxib and carprofen for the treatment of dogs with osteoarthritis, Polme (v0.1)

Medical Review

Review and provide comments or approval

Verdict*

☐ Approve

☐ Reject

*Required to proceed

Cancel Complete

Clicking Complete opens the verdict dialog box

Reviewer selects one verdict that will apply to all documents

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

Multi-document Workflows > Reference MDW >

Review

Details

Label* Review

Name* review

Type* Document Task

Description

Next Steps End

Document Task Options

General Settings

Task Label* Medical Review

Assign Task To* Approver

☒ Assign to all users in participant group
☐ Make available to users in participant group

Instructions* Review and provide comments or approval

Task Requirement* Required

Due Date

Due Date

Prompts ?

☐ Prompt for Document Fields: One field value that applies to all documents

☒ Prompt for Verdicts

☐ Multiple Verdicts: One verdict for each document

☒ 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

Create Case

Details

System Details

▼ Details

Name

Opened Date 09/03/2020

Case Contact*

Target Close Date

Contact Country

Response Sent Date DD/MM/YYYY

Origination Channel

Closed Date DD/MM/YYYY

Requestor

Total Days to Close

Requestor Name

Status

Case Priority*

19R3

Create Case

Details

System Details

▼ Details

Name

Opened Date 09/03/2020

Case Contact

Target Close Date

Contact Country

Response Sent Date DD/MM/YYYY

Origination Channel

Closed Date DD/MM/YYYY

Requestor

Total Days to Close

Requestor Name

Status

Case Priority

20R1

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

The screenshot displays the Veeva Configuration interface. The top navigation bar includes links for Business Admin, Logs, Users & Groups, Configuration (highlighted), Operations, Deployment, Connections, and Settings. A 'VAULT' link with a right arrow is also present. On the left, a sidebar menu lists various setup categories: DOCUMENT SETUP (Document Types, Document Fields, Field Dependencies, Field Layout, Rendition Types, Document Tags, Rendition Profiles), OBJECT SETUP (Objects, highlighted), REPORT SETUP (Report Types, Report Views), and QUEUE SETUP (Queues). The main content area shows the breadcrumb path 'Objects > Case > Fields >' followed by 'Case Priority'. Below this, the 'Details' section contains the following information: Label (Case Priority), Status (Active), Source (Standard), Name (case_priority__v), and Data Type (Object (Case SLA)). An 'Edit' button is located in the top right of the details section. The 'Options' section below contains several checkboxes: 'User must always enter a value (required)' (checked and highlighted with a blue box), 'Values must be unique' (unchecked), 'Display in default lists and hovercards' (checked), 'Do not copy this field in Copy Record' (unchecked), 'Allow create new reference record' (unchecked), and 'Secure relationship' (unchecked with a help icon).





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

The screenshot displays the MedComms system interface, specifically the 'Response Sent' stage of a workflow. The top navigation bar shows four stages: 'Assembling Response', 'In Approval (Optional)', 'Approved (Optional)', and 'Response Sent'. The left sidebar contains links for 'Case Details', 'Response', 'Add Fulfillment Document', 'Case Response Email', 'Workflow Timeline', 'System Details', and 'Sharing Settings'. The main content area shows the 'Audit trail for Case Response : Email: CASE-000005-RESPONSE-001'. It includes search filters for 'Included Objects', 'Quick history' (set to 'Last 7 days'), and 'Date range' (set to 'dd/MM/yyyy'). A 'Get History' button is present. Below the filters, it states 'Showing events for 11/03/2020 to 18/03/2020 (9 results)'. A table with four columns (Timestamp, User Name, Event Description, Record) displays the audit trail events. The first two rows are highlighted with a blue border.

Timestamp (dd/MM/yyyy)	User Name	Event Description	Record
16/03/2020 15:20 GMT	System	Email Successfully Received by Relay - Name: MSG-000004, Message Id: 4	Case Response : Email : CASE-000005-RESPONSE-001
16/03/2020 15:07 GMT	geoff.peters@vpmdemo.com	Email sent successfully - Name: MSG-000004, Message Id: 4	Case Response : Email : CASE-000005-RESPONSE-001
16/03/2020 15:07 GMT	System	Completed entry action execution for lifecycle state "Response Sent"	Case Response : Email : CASE-000005-RESPONSE-001



Enhanced Medical Inquiry Email Capabilities

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

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

VAULT SETTINGS

- General Settings
- Security Settings
- Checkout Settings
- Versioning Settings
- Branding Settings
- Search Settings
- Language & Region Settings
- Rendition Settings
- Help Settings
- Application Settings**
- CDN Settings
- CRM Rendition Settings

DOMAIN SETTINGS

- Security Policies
- Network Access Rules
- SAML Profiles
- OAuth 2.0 / OpenID Connect Profiles

Application Settings ?

Approved Email

Authentication tokens expire after

Portal

- ☒ Enable Portal
- ☐ Open Full Portal

DAM

- ☒ Enable InDesign Auto Linking

Linked Documents

- ☒ Allow creation of link annotations ?
- ☒ Enable Create & Import Document Links ?
- ☒ Allow creation of links to whole documents ?
- ☒ Bring forward Linked Document relationships to new versions ?
- ☒ Allow users to view and navigate annotation links in View mode. ?

Integration

- ☒ Updated iRep Integration
- ☐ Enable CLM Preview ?

Make a Copy

- ☐ Enable Reason for Copy

Medical Inquiry

- ☒ Enable Email Tracking
- ☒ Enable "Reply to" with Email Responses

Cancel Save





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

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

Objects > Case Response

Configure Page Layout for Email Records

Layout Rules (0) | Cancel | Save

Case Details

Response

Case Response Emails

Add Fulfillment Documents

Workflow Timeline

System Information

Response

Response Notes

Cover Letter

Allow Document Download

Link Expires In (Number of Days)

Preview Response Link*

Response Document Link*

+ Add

Case Response Emails

Name	Message Id	Sender	Recipient(s)	Status	Subject	Response Link URL
------	------------	--------	--------------	--------	---------	-------------------

Choose the columns to display



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	Date range	to
<input type="text"/>	Last day	dd/MM/yyyy	dd/MM/yyyy
Showing events for 17/03/2020 to 18/03/2020 (11 results)			
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

Response package failed to send. Case contact email is missing

Error if Case Contact has no email address

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.

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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 be seen in full if required – source info is HTML

Sent documents are visible here

Case Response Email: MSG-000005 ★ ACTIVE

Details

▼ Details

Name MSG-000005

Status Active

Created By System

Created Date 18/03/2020 14:36 GMT

Last Modified By System

Last Modified Date 18/03/2020 14:36 GMT

Message Id 5

Sender Veeva Biopharma Inc. <vault-emails@vault.veeva.com>

Recipient(s) David Smith <david.smith@abchospital>

Subject Medical Inquiry Response Received for: CASE-000006

Message Body

```
<html>
<head>
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
<title>Veeva Vault Notification</title>
<style type="text/css">
/* Client-specific Styles */
#outlook a {padding:0;} /* Force Outlook to p...Show more
```

Case Response [CASE-000006-RESPONSE-001](#)

Response Link URL https://medicaldemo3-vpmdemo.vaultdev.com/ui/approved_viewer?token=10001118-



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.



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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](#)

The screenshot shows a configuration form with three sections: 'Lifecycle*' with a dropdown menu set to 'Medical Information'; 'Document Version*' with two radio buttons, 'Absolute Latest' and 'Latest Steady State' (which is selected); and 'Current States*' with a dropdown menu set to 'Approved for Use'. A blue callout box with a pointer to the 'Latest Steady State' radio button contains the text: 'Choosing Latest Steady State will auto-select the Latest Steady State for you'.

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](#)

Permission Sets >
Custom External User Actions

	Manage Tags	Merge Anchors	Remove Annotations	Manage Anchors
Viewer Administration				✓

Custom Permission Set

Document's Lifecycle State
Security Settings

In Review						
Security Settings ?						
Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate
Owner	✓	✓				✓
Coordinator	✓	✓	✓	✓	✓	✓
Editor						
Viewer	✓	✓				✓

External users are now able
to Bring Forward Anchor
Annotations

External Schiraldi ▾

Bring Forward Annotations

Source version ?
0.3 ▾

Types to bring forward

- ☒ Lines (0)
- ☐ Links
- ☒ Anchors (1)
- ☒ Notes (2)

▸ Advanced

Cancel Continue





Object References in Advanced Search

- Overview

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

The diagram illustrates the process of adding object reference filters to the Advanced Search interface. On the left, a box titled "Advanced Search Document Filters" contains a list of five filters: "Filter 1 Portal", "Filter 2", "Filter 3", "Filter 4", and "Filter 5". A blue box highlights the first filter, "Filter 1 Portal". A callout box above this list states: "Add object reference fields to use as documents filters from advanced search. Fields that reference child objects must be added with the field that references its parent." A line connects the highlighted filter to a blue box in the center that says: "Up to 5 Object Reference fields can be added as a filter to Advanced Search". On the right, a screenshot of the "Advanced Search" dialog is shown. It includes fields for "Search In" (set to "All Documents"), "Document Name", "Document Number", "Search Scope" (with checkboxes for "Include content" and "Include attachments"), "Any of these words", and "All of these words". At the bottom, there is a dropdown menu labeled "Portal" which is highlighted with a blue box. A line connects the central blue box to this dropdown menu. The dialog also features "Clear All", "Cancel", and "Search" buttons at the bottom right.

- 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

Business Admin Logs Users & Groups Configuration Operations Deployment Connections **Settings**

VAULT SETTINGS

- General Settings
- Security Settings
- Checkout Settings
- Versioning Settings
- Branding Settings
- Search Settings**
- Language & Region Settings
- Rendition Settings
- Help Settings
- Application Settings
- CDN Settings
- CRM Rendition Settings

Search Settings

Search Thesaurus ?

Language Please select Export

Thesaurus File Choose File No file chosen Import

Advanced Search Document Filters ?

Filter 1	
Filter 2	
Filter 3	Allow PDF Download
Filter 4	Allow Source Download
Filter 5	Applicant
	Application
	Approver
	Batch Number

Select the appropriate Object Reference field

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

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

The screenshot displays the Vault MedComms interface. At the top, the header includes the 'Vault MedComms' logo, a 'Medical Library' dropdown, a search bar, and user information. Below the header is a navigation bar with tabs for 'Tasks', 'Cases', 'Verbal Responses', 'Written Responses', 'Medical Library', 'Portal', 'Reporting', and 'Other'. The main content area is titled 'All Medical Library' and shows a grid of medical documents. Each document card includes a status (DRAFT or APPROVED FOR USE), a thumbnail, and a title. The left sidebar contains 'VIEWS' (All Medical Library, Recent Medical Library, My Medical Library, Favorites) and 'FILTERS' (COUNTRY, PRODUCT, DOCUMENT TYPES, STATUS). The bottom right corner shows pagination: '1-25 of 58' and '1 of 3'.



Open Portal Experience from Vault



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

The screenshot displays the Veeva Vault Settings interface. The top navigation bar includes links for Business Admin, Logs, Users & Groups, Configuration, Operations, Deployment, Connections, and Settings (highlighted in orange). The left sidebar lists VAULT SETTINGS: General Settings, Security Settings, Checkout Settings, Versioning Settings, Branding Settings, and Search Settings. The main content area is titled 'Application Settings' with a help icon. It contains two sections: 'Approved Email' and 'Portal'. In the 'Approved Email' section, there is a label 'Authentication tokens expire after' followed by a dropdown menu set to 'Never'. The 'Portal' section contains two toggle switches, both of which are checked (indicated by green checkmarks). The first toggle is labeled 'Enable Portal'. The second toggle is labeled 'Open Full Portal' and is highlighted with a blue rectangular box.

Section	Setting	Status
Approved Email	Authentication tokens expire after	Never
	Portal	
Portal	Enable Portal	Checked
	Open Full Portal	Checked

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

The screenshot shows a configuration panel titled "CrossLinks". Inside the panel, there is a checked checkbox labeled "Enable CrossLink Documents". Below this, there are two unchecked checkboxes: "Exclude source document overlays" and "Exclude source document signature pages". A blue rectangular box highlights these two checkboxes.

- 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

The screenshot displays the Veeva User Object Admin Page for a user named Jake Roberts. The page is structured with a top navigation bar, a left sidebar, a main content area, and a right-hand menu.

Top Navigation Bar: Business Admin, Logs, **Users & Groups**, Configuration, Operations, Deployment, Connections, Settings.

Left Sidebar: USERS & GROUPS, **Vault Users**, Domain Users, Active Delegations, Groups, Security Profiles, Permission Sets, Application Roles.

Main Content Area: User: Jake Roberts (ACTIVE). **General Info** section includes fields for Name, Title, First Name, Manager, Last Name, Image, User Name, Language, Email, Office Phone, Preferred Currency, Mobile, Locale, Fax, and Location.

Right-Hand Menu: Edit, MANAGE (Make User Inactive, Resend Welcome Email, Reset Password), EDIT (Configure Page Layout), VIEW (Audit Trail).

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

The screenshot shows a dialog box titled "CLM Properties" with three sections: "CLM Properties", "Sharing Settings", and "KPI". The "CLM Properties" section is expanded, showing a dropdown menu for "iOS Resolution". The dropdown menu is open, displaying three options: "Default For Device", "Scale To 1024x768", and "Scale To Fit". The "Default For Device" option is currently selected. At the bottom of the dialog box, there are "Cancel" and "Save" buttons.

Default for Device displays in the device's native resolution

Scale to 1024x768 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

Document Fields > iOS Resolution

Details Security Overrides

Details ? Edit

Label iOS Resolution

Status INACTIVE

Source ▼ Standard Field

Name ios_resolution__v

Field Type Picklist

Used in Multichannel Slide

Help Content Select Default for Device to display in the device's resolution. Select Scale to 1024x768 to fix the resolution and display centered & letterboxed. Select Scale to Fit to stretch the content to full screen. Blank will default to Scale to 1024x768.

Label iOS Resolution

Status ✓ Active
Inactive

Source ▼ Standard Field



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

The screenshot displays the Vault MedComms web application. At the top, there's a navigation bar with the Vault MedComms logo, a search bar for cases, and user information (MedComms Deep Dive, Username CSM). Below this is a secondary navigation bar with tabs for Tasks, Cases (active), Verbal Responses, Written Responses, Medical Library, Portal, Reporting, and Other. A shopping cart icon, a '+ Create' button, and an 'ADMIN' link are also present.

The main content area shows a breadcrumb trail: Case Responses > CASE-000064-RESPONSE-001. Below this, the case title 'Case: CASE-000064' is followed by a status indicator (green circle) and a star icon, with a 'IN PROGRESS' label. To the right of the case title are 'Edit' and 'Settings' icons.

A progress bar at the top of the case details shows three stages: 'Received' (green), 'In Progress' (blue, currently active), and 'Complete' (grey).

On the left, a sidebar lists various case-related items: Case Requests (1), Case Responses (1), Adverse Events and Product Complaints (0), Case Content Request (0), Attachments (0), QAs (0), Workflow Timeline, System Details, and Sharing Settings.

The main details section is titled 'Details' and contains the following information:

- Status: Green circle icon
- Opened Date: 12/03/2020
- Case Contact: [Diana Feelgood](#)
- Target Close Date: 17/03/2020
- Contact Type: Pharmacist
- Name: CASE-000064
- Contact Country: [United States](#)
- Origination Channel: Call Center
- Case Priority: [Standard](#)

Below the details is a section for 'Case Requests'. It includes a '+ Create' button, a search bar, and a 'Show in Tab' link. A table lists the request details:

Name	Product	Request Category	Request Details	Preferred Response Method
CR-000059	Cholecap	Clinical Study Information	Please share phase II clinical tria...	Mail

At the bottom, there are expandable sections for 'Case Responses', 'Adverse Events and Product Complaints', and 'Case Content Request'.



Display Custom Participant Group on Object Workflow Start Dialog



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

Object Workflows > Claim Record Review and Approve ... >

Start

Name start__c

Type Start

Description

Next Steps [Change State: In Review](#)

Start Options ?

Control 1: Instructions

Instructions Send claim out to for review and approval by an MLR team

Control 2: Participants

Participant Label Medical

Add Participants ☒ Allow workflow initiator to select participants

Roles allowed to participate

Roles not allowed to participate

☐ Use roles as participants

☐ Use custom action to define participants



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

Product: Cholecap ★ ACTIVE Edit Settings

Details

Product Name Cholecap

Status Active

Product Abbreviation CC

Generic Name

Internal Name

Compound ID

INN

Therapeutic Area

Product Family

External ID P102

Case Requests

+ Create Show in Tab

Name ^	Product	Request Category
CR-000001	Cholecap	Dosage and Administration
CR-000002	Cholecap	Efficacy
CR-000003	Cholecap	Concomitant use / Interactions

FILTERS Back to previous page

CONSENT RECEIVED?

OFF-LABEL?

PREFERRED RESPONSE METHOD

☐ All 14

☒ Email 14

☐ Phone 5

☐ Mail 2

☐ (undefined) 5 Advanced

REQUEST CATEGORY

☐ All

☒ Efficacy 10

☒ Dosage and Administration 4

Case Requests

▼ Filters (2) Clear All Filters

» Preferred Response Method: Email ✕

» Request Category: Efficacy, Dosage and Administration ✕

Name ^	Product	Request Category	Request Details
CR-000002 ★	Cholecap	Efficacy	What is the optimal temperature at which Cholecap should be stored?
CR-000005 ★	Cholecap	Dosage and Administration	Is Cholecap Indicated for pediatric patients under 18 years of age?
CR-000010 ★	Cholecap	Dosage and Administration	Can Cholecap be given to patients under 18 years of age?
CR-000012 ★	Cholecap	Dosage and Administration	Can Cholecap be given to patients under 18 years of age?

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

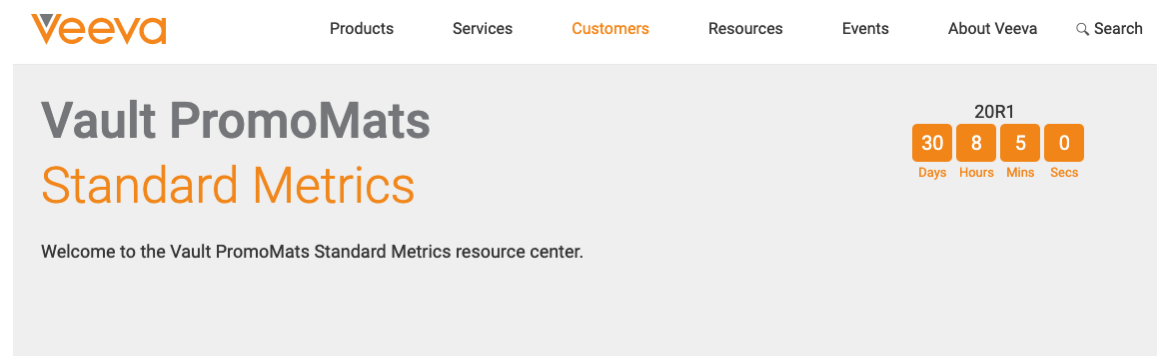
Use filters to show data you need



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



4 Steps for Getting Ready

Download this library of resources to help your organization prepare for Vault PromoMats Standard Metrics and support with end-user communications.



Vault PromoMats Standard Metrics

Vault PromoMats Standard Metrics Overview Presentation

Learn more about Vault PromoMats Standard Metrics and discover the benefits and value this feature will bring to the life sciences industry.

[Download Presentation ▶](#)

FAQ

Use this FAQ resource to address any questions you or your end users might have on Vault PromoMats Standard Metrics.

[Download FAQ ▶](#)



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

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

ENVIRONMENT

- Vault Compare
- Vault Configuration Report
- Sandbox Vaults

MIGRATION

- Outbound Packages**
- Inbound Packages

Outbound Packages ?

+ Create | Search Columns

Name ^	Summary	Owner
PKG-0002	Migration mode	Maria Ruoto
PKG-0004	Export Object data, including Object	Maria Ruoto

Create Outbound Package

Select Outbound Package Type.

- Test Data
- Migration
- Test Data



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

Outbound Packages > Create Test Data

Details

Name* Outbound Package Type Test Data

Status* Active

Owner

Summary*

Description

Test Data User

Created Date

Last Modified Date

Outbound Packages > PKG-0004 > New Dataset ?

Dataset Configuration

Primary Object *

Country (country__v)

+ Add Related Object

Related Object

Product Country

+ Add R

Outbound Packages > Test Data: PKG-0004 ★ ACTIVE

Details

Name PKG-0004 Outbound Package Type Test Data

Summary Export Object data, including Object relationships between two Vaults

Owner Maria Ruoto

Created Date 2/12/2020 5:03 PM EST

Description

Test Data User

Last Modified Date 2/12/2020 5:03 PM EST

Data

Dataset	Object Name	Object Label	Action	Key Field	Key Field Label
DSET-00004	country__v	Country	Create		
DSET-00004	product_country__c	Product Country	Create		
DSET-00004	product__v	Product	Create		

Outbound Packages > Test Data: PKG-0004 ★ ACTIVE

Details

Name PKG-0004 Outbound Package Type Test Data

Summary Export Object data, including Object relationships between two Vaults

Owner Maria Ruoto

Created Date 2/12/2020 5:03 PM EST

Description

Test Data User

Last Modified Date 2/12/2020 5:03 PM EST

Data

Packages

Download All Upload

34820_PKG-0004.vpk

02/12/2020 17:05 Exported by: Maria Ruoto



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

User Name	Domain Status	Last Login
@vpmdemo.com	Inactive	
icon-001@vpmdemo.com	Active	11/9/2017 4:36 PM EST
medical2@vpmdemo.com	Active	
medical3@vpmdemo.com	Active	
not.applicable@vpmdemo.com	Active	
ViewBased1@vpmdemo.com	Active	
Gannie.Aaron@vpmdemo.com	Active	
Regan.Abercrombie@vpmdemo.com	Active	
amy.demo@vpmdemo.com	Active	12/2/2019 1:52 PM EST
Coriss.Abrams@vpmdemo.com	Active	

- Considerations

- New Domain User page is read-only except for membership assignments across Vaults
- Domain User Management requires the Domain Admin setting enabled

Details

Created Date: 2/13/2020 10:45 AM PST

Created By: Maria Ruoto

Last Modified By: System

Last Modified Date: 2/20/2020 5:43 PM PST

License Type: Full User

Security Profile: Vault Owner

☐ Domain Admin

Status: Active

Federated ID

Last Login: 2/20/2020 5:43 PM PST

Security Policy: Basic

Salesforce Username

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

The screenshot displays the Veeva Vault interface for configuring migration packages. It includes several panels and callouts:

- Top Panel:** Shows 'All Vendors' with a table of records. A callout points to the 'Lifecycle State' column, stating: "Custom Object with data records in non-initial Lifecycle state".
- Dataset Configuration Panel:** Shows 'Vendor (vendor__c)' as the primary object. The 'Action' is set to 'Create'. A checkbox for 'Record Migration Mode' is checked. A callout points to this checkbox, stating: "Record Migration Mode only available with the Create action: Outbound Package > [Package] > Data > [Dataset] > Action Wheel > Edit".
- Columns Panel:** Shows 'Available Columns' and 'Selected Columns'. 'Lifecycle State (state__v)' is selected. A callout points to this selection, stating: "Outbound Package showing that Record Migration Mode is set to Yes".
- Outbound Package Details Panel:** Shows details for 'PKG-0002'. The 'Record Migration Mode' is set to 'Yes'.



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

Users ?		
+ Create	Active Users ▾	Search Columns 🔍
Name ▲	Email	Lifecycle State
Application Owner	dev.null@veeva.com	Active
Cholecap Reviewer	maria.ruoto@veeva.com	Active
Cindy DiNitto	cindy.dinitto@veeva.com	Active
Cody Commenter	⚙️ maria.ruoto@csm.com	Active
Integration User	maria.ruoto@veeva.com	Active
Jake Roberts	maria.ruoto@veeva.com	Active
Janice Ruiz	janice.ruiz@veeva.com	Active
Maria Ruoto	maria.ruoto@veeva.com	Active
Pending User	maria.ruoto@veeva.com	Active
Quint Portal_Only	maria.ruoto@veeva.com	Active
Regan Ruoto	maria.ruoto@veeva.com	Active
Tony Tiger	maria.ruoto@veeva.com	Active
Tyler Vicknair	tyler.vicknair@veeva.com	Active

Details

License Type* ▾

Last Modified By

Security Profile* ▾

Last Modified Date

☐ Domain Admin

Last Login

Status

Security Policy ▾

Federated ID

Salesforce Username

Created By

Created Date

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

Created Date 1/25/2018 12:16 PM PST	Status Active
Created By System	Federated ID
Last Modified By System	Last Login 2/19/2020 9:10 PM PST
Last Modified Date 2/19/2020 9:55 PM PST	Security Policy Basic
License Type Full User	Salesforce Username
Security Profile Vault Owner	<input type="checkbox"/> System Owned User
<input checked="" type="checkbox"/> Domain Admin	

Yes/No field is system managed and read only

- 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

Login Audit History ?

Quick history

Select time period... ▼

Date range

12/1/2019

to

12/31/2019

Get History

Showing events for 12/1/2019 to 12/31/2019 (341 results)

Timestamp (M/d/yyyy)	User Name	Source IP	Type	Status
12/31/2019 10:00 PM PST	sandra.schmitt@vv-csm.com	54.71.227.136	User Login	Success

- 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

Edit Details: Base Document

Source ▼ Standard

Label*

Base Document

Name

base_document__v

Description

Document Number Format

VV-{} (Field truncates at 60 resolved characters)

Document Name Format (Not inherited from parent. Remove override) ?

☒ Use File Name

☐ Use custom format

Available Lifecycles*

General Lifecycle ✕

Rendition Types

Viewable Rendition Large Size Asset **Unmodified Source** Imported Rendition ✕ Custom Thumbnail ✕

Panoramic Thumbnail ✕ Veeva Distribution Package ✕

Cancel Save

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.

Login Audit History ?

Quick history

Select time period... ▾

Date range

1/1/2020

to

2/12/2020

Get History

Please enter a valid date The time period can not exceed 2 weeks

Login Audit History ?

Vault ID



equals

3012

+ Add filter

Apply

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