Veeva Commercial Vault 20R1 Deep Dive



Always refer to the latest Release Notes and Online Documentation for the most up to date version of documentation and configuration steps



Automatically activated and no configuration is required before using the feature; note that in some cases, a new feature is dependent on another feature that must be enabled or configured. Admins must turn on the feature with an Admin checkbox. Note that some "Auto-On" features have a checkbox setting that hides the feature; these will show "Auto-On." Admins must configure the feature (separately from an Admin checkbox) before it is available to use or is active; for example, an Admin must add document templates before users can create documents from templates. Contact Veeva Support to enable/disable

Agenda

- Standard Metrics
- Auto-On Features
- Automated Claims Linking
- Configurable Features
- Admin Features
- Multi-Document Workflows
- Object Lifecycles
- Resources

New Veeva Global Support Offering

Veeva Product Support Engineers are reachable via phone starting January 2020

Open a support ticket Utilize the phone • An Interactive Voice online on Veeva channel to report Response (IVR) system **Product Support Portal** production outages guides the caller through and/or request Veeva Product Support the options: information about open cannot open tickets on Select the Veeva Product tickets Outage report or inquiry behalf of customer about an existing ticket contacts over the phone

Regional Phone Numbers

- The following numbers could be used to report outages or speak to the Veeva support engineer currently assigned to work on your tickets
- Phone support cannot be used to open a new ticket

Country	Phone Number	Country	Phone Number
Australia	+61 (2) 80741203	Philippines	+63 (2) 86396781
Brazil	+55 (11) 49355403	Mexico	+52 (5) 565991794
Canada	(800) 467-7818	Poland	+48 (22) 2922149
France	+33 (805) 371639	Spain	+34 (900) 423475
Germany	+49 (800) 0009586	Switzerland	+41 (800) 563377
Hungary	+36 (80) 019385	United States	(888) 537-3064
India	(000800) 9190775	United Kingdom	+44 (800) 3686283



Us

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• Overview

- Standard Metrics, a new document metadata section, will be visible in all PromoMats Vaults in 20R1
- Standard Metrics includes the following document fields:
 - Global Content Type
 - Content Creation Currency
 - Content Creation Cost
 - Initial In Review Date (System Generated)
 - Days to Enter Review (System Generated)
 - Days in Review (System Generated)
 - Number of Review Cycles (System Generated)
 - Initial Steady State Date (System Generated)
 - Days of Approval (System Generated)

 Standard Metrics

	Global Content Type	Event Material
er input	Content Creation Currency	European Euro
fields	Content Creation Cost	European Euro > 4. €50,001 to €100,000
	Initial In Review Date	11/5/2019 11:31 AM GMT
	Days to Enter Review	0
Auto-	Days in Review	3
pulated v Vault	Number of Review Cycles	4
	Initial Steady State Date	11/9/2019 10:01 AM GMT
	Days to Approval	4



Considerations

- The user input fields (Global content type, Content creation currency, and content creation cost) will not be mandatory in the 20R1 release
- In 20R2 the 3 user input fields will be required
 - For existing documents, Vault will automatically set required fields to Not Specified
 - For custom permission sets created after 20R1, users will need Read access to these fields so that they can select a value
 - These fields are editable up until it reaches a steady state
- Weekends are included in the count for fields:
 - Days to Enter Review
 - Days in Review
 - Days to Approval

Global Content Type	Not Specified
Content Creation Currency	Not Specified
Content Creation Cost	Not Specified > Not Specified

- Standard Metrics <u> </u>	
Global Content Type	Event Material
Content Creation Currency	European Euro
Content Creation Cost	European Euro > 4. €50,001 to €100,000
Initial In Review Date	11/5/2019 11:31 AM GMT
Days to Enter Review	0
Days in Review	3
Number of Review Cycles	4
Initial Steady State Date	11/9/2019 10:01 AM GMT
Days to Approval	4



• Configuration

- Contact your Managed Services consultant or CSM for additional guidance
 - Admin > Configuration > Document Lifecycles
 - For each Document Lifecycle under 'Details', ensure the Document Lifecycle states are set for each of the required states Steady State & In Review State

ocument L /lateri	ifecycles > al											
	Details State	es Event Actions Workflows Roles Expiration eSignature Pages Overlays										
Details	8	Delete										
	Labe	I Material										
	Name	e materialc										
Source 🔨 Custom												
Description MLR Review and Approval for promotional materials.												
	Status ACTIVE											
	Document Type	a Material										
	Starting State	a Draft										
	Steady State	e Approved for Distribution										
	Superseded State	a Superseded										
	Obsolete State											
Multi-d	locument Workflow:											
Multi d	Pre-Approval											
Multi-u	Approved											
Multi-d	locument Workflow:											
	Rejected	1										
	In Review	n Review										
	Rejected	Revise and Resubmit										
	Deleted State	2										



- Configuration
 - Global Content Type
 - Admin > Configuration > Document Types > Edit Details > Global Content Type > Save



- Global Content Currency
 - Admin > Settings > Application Settings > Edit > Standard Metrics > Default Content Creation Currency > Select > Save

Standard Metrics		
	Enable Standard Metrics	
	Default Content Creation Currency	Not Set 🔹
User Profile		Not Set Decline to Provide USD EUR
	Show "Grant Access to Veeva Supp	GBP JPY

Vault PromoMats Standard Metrics Summary

Overview	Availability	Benefits
 Vault PromoMats Standard Metrics empowers you to gain insights about key business challenges at the heart of your content strategy What is the avg. approval time? How many review cycles does it take? What is the avg. time content spends in review? What is the cost to create content across various types? 	 When will Vault PromoMats Standard Metrics be available? Announced at the 2019 Veeva Summit Released in 19R3 (December 2019) as an optional feature Auto-On in 20R1 (April 2020) Mandatory in 20R2 (August 2020) Benchmarking (2021), industry benchmarking data provided by Veeva 	 Run reports based on the data captured in Standard Metrics (Days in Review, Time to Approval, Cycle Count, etc.) For the first time, allow you to compare your business processes against anonymized average industry benchmarks (mid/late 2021)



Auto-on Features

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 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 <u>Create Button</u>





Updated Document and Record Picker Dialog



- 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
- Cart is now available as a filter
- Considerations
 - The new dialog is available in document relationships, document reference fields on records, and related document sections in object records

Search: Product					S	Select Document
Search, Floudel		Ac	dd Related Documents	O		
Use search bar to find an item, and the	en use the table below to make s	[Fields • Q			Fields -
▼ Filters			▶ Filters ▲ Upload Document Name (A-Z) ▼	All Documents Recent Documents		Filters
Start typing to see op Before	e		Screen Shot 2017-06-23 at 4.08.34 PM(1) (v0.1) US1900069 Cholecap Material > Advertisement	Favorites ↓ Cart		Clear Selection Document Name (A-Z) -
Product Name	Product Abbreviation		Screen Shot 2017-06-23 at 4.08.34 PM(1) (v0 Cart is now	DRAFT		21 CFR Part 11 & Annex 11 Overview - Supplemental (v0.1)
Cholecap	CC		US-1900068 Call Lis How Cholecap Material > Advertisement available as a			VV-QUAL-00008
Email Receipt	0		Shutterstock Doctor Images(6) - United States US-1900027	DRAFT		Training > Material > Reference Material
Felinsulin	FIN		Cholecap Material > Advertisement			
General	GEN		Shutterstock Doctor Images(6) - United States - CC-04-201900 (v0.1)	DRAFT		VV-QUAL-00062
		I	Cholecap Material > Advertisement			Governance and Procedure > Standard Operating Procedure (SOP)
	Checkma for multi-s		Sunrise Business Considerations - CSM Education (v0.1) US1900030 Cholecap Material > Advertisement	DRAFT		
			Sunrise Business Considerations - CSM Education(1) (v0.1)	DRAFT		Radio buttons
				Close		for single-select

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**





Footnote & Endnote Linking in PDF Renditions of MS Word Files

- 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%									
Suppo	orting References								
1. 2.	Role of Atorvastatin in Dyslipidemia - A Clinical Study. Med Educ. 2005; 89: 548-549 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	e Notes								
•	Full ISI & Link to the PI must be presented within visual proximity of statement								
¹ Curren	t PI can always be found in PromoMats								



Navigate External Bookmarks

- 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





Dynamic Tabs



- 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

Product: Chole	есар 🚖 астіче	Tasks Library	Claims and	Reference - Reportir	d 🔻 Portal	✓ Portal Users ¥					
▶ Product Det	tails		FILTERS	1 100	« Back to previous page Countries Appre	oved for Sale	e Dynam	ic tabe will	default to		
	pproved for Sale/N rketing	✓ APPROVAL STATUS ✓ FIITERS (1) Clear All Filters					Dynamic tabs will default to a filtered set of records				
+ Add	Q Show in Tab		1-6 of 6 🏾 🗢 🔻	Approval Pending	2	Name	Approval	Local Product	Country Name	Product Name	
Name A Canada	Country Name > Country Name Approve Canada Approve	al Status Local Product Name d Cholecap-CA	e Product Name Cholecap	Col	Not Approved	1 Advanced	Canada 🔺	Status Approved	Name Cholecap-CA	Canada	Cholecap
China	China Not App	roved	Cholecap	CN	▼ PRODUCT NAME		Germany 🔺	Approval Pending	Cholecaper	Germany	Cholecap
Germany	Clicking the Show In Tab li	nk ^{g Cholecaper}	Cholecap	DE	All Cholecap		Italy 🌟	Approved	Colecap	Italy	Cholecap
Italy	will always show the relate		Cholecap	IT	Cholecap Restolar	0	China 🔺	Not Approved		China	Cholecap
Netherlands		g Colecan	Cholecap	NL	- Restolar	2 Advanced	United Kingdom 🔺	Approved	Choletab	United Kingdom	Cholecap
United Kingdom	records in a dynamic tab	Choletab	Cholecap	UK			Netherlands 🔺	Approval Pending	Colecap	Netherlands	Cholecap



- 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





- You need to exclude holidays and weekends from your workflow report in order to get proper metrics for your business users
- Where to Find

Up

- 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 F	References	Reports	Dashboards	Admin Tools	Portal	Multichannel	Loader	CRM Publishing	Last Login	Approved Images			
		^{ck to reports} Orkflow V	Vorkday	Duration	/*											
	•	PROPERT Report Type	TES Workflow with	th Document												
	•	CONDITIC	NAL FIELDS	S												
	Ť	FILTERS (Select Field	. ,			•										
	•	PROMPTS	6 (optional)													
							Workfl	ow Name		Workflow O	Dwner	Workflow	Start Date	Workflow Completion Date	Document Name	,
		oup rows by	Select Field p by (optional)	_			the repo									
oad the updated Excel template	·	Excel Temp	ple				nplate a as desir									
		Upload Fit PDF	export columns	s to one page												



• Example: Excel template







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

		Returned 109 records												
1 -	ADVANCED OPTIONS	Document Name	Document Number	Document Status	Created By	Created Date	Туре	Subtype	Classification	Product	Country	Annotations (AII)	Annotations (L	inks)
	Excel Template 😨	16.5.4 Create & Relate Records from Document Fields Example (v0.1)	US-1900079	Draft	Jean Marie Schiraldi	5/1/2019 5:47 PM EDT	Material	Advertisement		Cholecap	United States		0	0
	La Sample	16.5.4 Create & Relate Records from Document Fields Example (v0.1)	US1900080	Draft	Jean Marie Schiraldi	5/1/2019 5:47 PM EDT	Material	Advertisement		Cholecap	United States		0	0
	Opioad													
	Eit PDE expert columns to one p	200												
	Fit PDF export columns to one p	age												
	Upload Fit PDF export columns to one particular of the particula													

Returned 109 records			
Document Name	Document Number	Document Status	Created By
16.5.4 Create & Relate Records from Document Fields Example (v0.1)	US1900079	Draft	Jean Marie Schiraldi
16.5.4 Create & Relate Records from Document Fields Example (v0.1)	US1900080	Draft	Jean Marie Schiraldi

Task Verdict Comments in Reports



 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

Object Workflow with Task Comments 🚖

Report Type Workflow with New Product

PROPERTIES

	_	 FILTERS (0) 				
		Workflow (5)	Workflow Owner	Workflow Status	Workflow Start Date	Task Verdict Comment
Review S		New Product New Product New Product New Product	Maria Ruoto Maria Ruoto Maria Ruoto Maria Ruoto	Complete Cancelled Cancelled Cancelled	1/3/2020 11:14 PM EST 1/4/2020 12:14 AM EST 1/4/2020 12:14 AM EST 1/6/2020 12:19 PM EST	Logo also approved.
Review product details and provide disposition	L	New Product	Maria Ruoto	Complete	1/6/2020 1:21 PM EST	All Required information is here.
Reason Verdict* O Approved		dict Commen		Edit Columns to Display Search: Available Columns Workflow Action Task Assignment Date		Restore
Rejected Additional Information* All Required information is here. G *Required to proceed Cancel Complete		kflow Task Ow be included in		Task Cancellation Date Task Capacity Task Creation Date Task Creation Date Task Last Modified Date Task Aust Modified Date Task Queue Group Task Reason Code Task Verdict Workflow Cancellation Date Workflow Conpetion Date Workflow Count (fx) Workflow Due Date	World/w Status World/w Status Date Task Verdict Comment Task Verdict Comment Task Completed By Task Completed Date Task Name Task Status New Product Name	
	Co	opyright © Veeva	Systems 2020			

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Task Verdict ment column t be added to he 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	8
	Short-circuit tasks with the configured tags.	
	Prompt for Comments	8
	Additional Information	
	O Add eSignature	
	O Add Reasons	
	Add Field Prompts	



Auto Claims Linking

Auto Claims Linking: Make Dependent on Link Annotation Enablement

Overview

- When 'Allow creation of link annotations' is disabled in Admin, Vault:
 - Hides the Suggest Link button on the Doc Info page
 - Hides any existing Suggested Links
 - Does not display Suggested Link options in the Document Type settings
- Configuration
 - Admin > Settings > Application Settings > Linked Documents > Allow creation of link annotations

Linked Documents

Allow creation of link
 Bring forward Linked
 Allow users to view a

' is	Application Settings 😮
nfo page	Approved Email Authentication tokens expire after Never
the	Portal Enable Portal Open Full Portal
Linked tations	Compliance Package Generation Allow Compliance Package Generation <u>PI Document Type</u> Reference > FPI - Full Prescribing Information Enforce Documents are in Steady State
	DAM
	Linked Documents
annotations Ocument relationships t an navigate annotation lin	Bring forward Linked Document relationships to new versions

Auto Claims Linking: Match Text Variations

- Overview
 - Users can now add up to five Match Text Variations (alternate phrases) to each Claim record
 - If you need more, contact Support (max 9)
 - The Automated Claims Linking feature will be able to find and link each variation to the defined set of references on the Approved Claim
- Considerations
 - Match Text Variations must be individually approved before Vault will recognize them
 - Match Text Variations must be between 20 and 1500 characters
 - If a Match Text Variation is withdrawn, it no longer counts towards the variation limit

Use Case

Claims that have multiple approved ways of being stated

Accept Reject

Skele

Cholecap can significantly reduce LDL

▼ Cholecap Prescribing Information (PI) (v1.0)

about a minute an

reduce cholesterol levels (p.1)

- Helpful when working with multi-language geographies (e.g. Canada)
- Cholecap can significantly reduce LDL-C when used as directed

reduce LDL-C

When used as directed,

Cholecap can significantly





+ Create

Name 🔺

MTV-00000





Auto Claims Linking: Match Text Variations



- To add Match Text Variations
 - Open the Match Text Variations panel from the Claim record detail page
 - Click the Create button
 - Enter the alternate Match Text
 - Click Save or click Save + Create (to enter additional match text variations)
 - Approve Match Text Variation (must be Approved to be used by feature)

^{Claims >} Claim: CL-00001	2 📩 APPROVED									
- Details										
	Name CL-000012					Clai	ims > CL-000023 > Match Text Vari	ations		
	Country United State	35.				100000	reate Match Text Val			
	Product Cholecap					-				
	Match Text Reduces ris	k of mortality by 41% with Cholecap vs pla	acebo				✓ Details			
	Category Efficacy							Name		
	Lifecycle Claims Lifec	cycle						Claim	CL-000023	
	Lifecycle State Approved							Match Text*	When used as directed, Cholecap can significantly reduce LDL-C	
	Created By Maria Ruoto									C
	Created Date 10/10/2019	1:32 AM EDT						Lifecycle State	-	
	Last Modified By Maria Ruoto							Created By		
	Last Modified Date 10/10/2019	2:40 AM EDT						Created Date		
	Status Active									
- References								Last Modified By		
+ Add	Q,							Last Modified Date		
Name 👻	Reference Type	Document	Reference	Created By	Created Date			Status		
LT-000019	Anchor	Cholecap Prescribing Information (PI) (v1.0)	1570648520996	Maria Ruoto	10/10/2019 2:19 AM EDT					
- Match Text Vari	ations									
+ Create	Q Show in Tab									

Auto Claims Linking: Hierarchical Copy on Claims

Overview

 When making a copy of a Claim record users will have the option to also copy the original Claim's References (Claim Targets) and Match Text Variations



Considerations

- Match Text Variations will be created in the new Claim record in a Draft state



Overview

 A new Remove Suggested Links button has been added that allows users to removes all Suggested Link annotations on the document



- When users with the proper permissions are in annotate mode
- When Suggested Link annotations exist
- Removing Suggested Links does not prevent users with the correct permissions from using the Suggest Links action on the document in the future
- Links created manually and Suggested Links that have been accepted will not be removed



Continue

Auto Claims Linking: Prevent Move & Edit References on Approved Links

- Overview
 - Once a Suggested Link is accepted
 - The ability to add or remove references, or move the resulting Link Annotation will be locked
 - The associated Move and Link 💿 buttons will not appear in the Annotation toolbar

	J.	Î	The Move and Link buttons do not appear in the toolbar
Complications of long term	elevated Cho	×	and the ability to edit and delete is not available
Cholecap Patient Leaflet (v	1.0)		
Maria Ruoto	seconds ago (v1	.1)	

- Considerations
 - The link creator will have the ability to edit comment and tags or delete the Accepted Link



Auto Claims Linking: Add Suggested Links Doc Field

- Admins can now add a new field, 'Suggested Links' (annotations_suggested___v), that shows the count of pending Suggested Link annotations as:
 - a column in document tabular views
 - a filter criteria in document reporting
 - a lifecycle state entry criteria
 - a condition for a lifecycle state entry action
- Considerations
 - Once a user accepts, rejects, or removes a suggested link, that link is no longer included in the count

Recent Library 😮									
Name		Document Number	Status	Product	Туре	Created By	Global Content Type	Suggested Links	
CholeCap Indicationa and	۵	US-CH-2000001	Draft	Cholecap	Material	Maria Ruoto	Meeting Materials	2	
Usage (v0.1) 🌟									

Auto Claims Linking: Add Suggested Links Doc Field

- Use Case
 - Use Suggested Links as Entry Criteria to confirm that all Suggested Links have been resolved prior to routing for review

	ecycles > Material > States > for Review							
Entry C	itorio		Details	User Actions	Security Settings	Entry Criteria	Entry Actions	
Entry C	iteria							
Alwa	ays OConditional							
lf	Suggested Links	✓ is less than		-	1			
	Add condition							
Va	lidate that					Confirm ther	e are no	
	Relationship	✓ Linked Documents	•	exists		Suggested Links to be resolved workflow pro	before the	

Auto Claims Linking: Where Used Component

- Overview
 - For PromoMats Vaults utilizing Auto Claims Linking, the Claim Detail page will include the Where Used component
 - Where Used presents a list of documents where the claim was a Suggested Link result
 - Allows for quick reference of everywhere the Claim has been suggested and/or used in materials
- Use Case
 - If a claim needs to be revised or removed from materials, the Where Used list will support an audit of materials that include the claim

- Where Used					
Q					
Name	Suggested -	Pending	Accepted	Rejected	Last Used
Cholecap Patient Brochure - US (0.1)	5	2	2	1	Feb 26 2020 7:38:08 AM CST
Cholecap Patient Brochure - Canada (0.1)	3	0	2	1	Feb 26 2020 7:38:25 AM CST
Cholecap Patient Brochure - Global (0.1)	1	1	0	0	Feb 26 2020 7:35:27 AM CST

Includes columns indicating total count for Suggested Link as well as totals for Pending, Accepted, and Rejected status



Configurable Features
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



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Open Portal Experience from Vault



Configuration

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

Business Admin Logs Use	rs & Groups Configuratio	n Operations	Deployment	Connections	Settings
VAULT SETTINGS	Application Settin	gs 😮			
General Settings	Approved Email				
Security Settings	Approved Email	Authentica	tion tokens expire	after Never	
Checkout Settings		Additiona			•
Versioning Settings	Portal				
Branding Settings	i ortai	Enable Por	tal		
Search Settings		 Enable Pol Open F 			



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 Lifecycle's State Security Settings
- Configuration
 - Admin > Settings > Users & Groups > [Permission Set]
 - Admin > Settings > Configurations > [Lifecycle] > [State] > Security Settings

• Learn more about **Bring Forward Annotations**



Source version 🚱	ations Exterr	nal users are no	w able to
0.3	Bring Fo	rward Anchor A	Annotation
Types to bring forward			
 Lines (0) Links 			
Anchors (1)			
Anchors (1)Notes (2)			



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

Business Admin Logs Users	s & Groups Configuration	Operations Deployment	Connections	Settings	
VAULT SETTINGS	Search Settings				
General Settings Security Settings Checkout Settings Versioning Settings Branding Settings	Search Thesaurus (2) Language Thesaurus File	Please select Choose File No file chosen		Export Import	
Search Settings Language & Region Settings Rendition Settings	Advanced Search Docu Filter 1 Filter 2	iment Filters @	•	Select the appropriate Obj Reference field	ject
Help Settings Application Settings CDN Settings	Filter 3 Filter 4	Allow PDF Download Allow Source Download Applicant Application			
CRM Rendition Settings	Filter 5	Approver Batch Number			

Additional Deletion Rule for Document Reference Fields

Overview

- Document reference fields on an object have a new Deletion Rule called *Set field to blank when related document is deleted*
- When a user deletes the referenced document, Vault sets the field that references the deleted document to Null (blank)

		17.2	% Reduction in LDL-C ·	- Delete Doc	(v0.1) ★ 🛛	DRAFT Edit		Export Annotations	\$ -	
▼ Details			Pending Approval	Approved Fo	r Use	Do Not Use		Import Document Links	1	
Match Text Product	CL-000016 Cholecap beats all competition in lowering LDL-C <u>Cholecap</u> 37.2% Reduction in LDL-C - Delete Doc (v0.1)	Z Annotate ²	Cholecap beats all competition in low Supporting References	Pelete Doc Are y "37.2	ou sure you w	ant to delete the document n LDL-C - Delete Doc''?	▲ Gene	 Upload New Version Create Draft Re-render Document Word Rendition Settings Make a Copy Delete Workflow History Report Duplicate Content Report Where Used]	
Lifecycle	Claims Lifecycle	Last Modifi	ed Date 2/11/2020 2:53 PM EST Status Active			- Details				
Lifecycle State	Draft					Name CL-00	00016	с	ategory	
						Match Text Chole lower	ecap beats all com ing LDL-C by 37 .2	petition in Cla 2 % at 6 weeks	im Risk	
		The	referenced docume	ent field is		Product Chole	ecap	Cre	ated By	CSM User
			o blank when the do		<u> </u>	Claim Document		Creat	ed Date	11/20/2019 12:07 PM EST
			deleted			Country		Last Mod	ified By	System
						Lifecycle Claim	is Lifecycle	Last Modifi	ed Date	2/11/2020 3:28 PM EST
			Copyright ©	Veeva System	ns 2020	Lifecycle State Draft			Status	Active

Additional Deletion Rule for Document Reference Fields



Configuration

- Admin > Configuration > Objects > [Object] > Fields > [Field] > Edit Field

Label*	Claim Document				
Status	Active •				
Source	K Custom				
Name*	claim_document	c			
Data Type	Object (Documents)				
Unbound Document Field	Claim Document (unbound) (claim_document_unboundc))			
Help Content					
Options					
(User must always enter a value (required)				
	Values must be unique				
	Display in default lists and hovercards			Th	e labels of the Deletion Rule
(Do not copy this field in Copy Record			drop	o-down have been updated to
	Secure relationship 🔞				nore accurately reflect the
Document Version	Latest version 🔻				
Reference					functionality
Outbound Relationship	claim_document	cr			
Name*					
Inbound Relationship	Claims				
Label*					· .
Inbound Relationship	claims	cr	Delet	ion Rules	Set field to blank when related document is
Name*					Prevent deletion of the related document

Set the Deletion Rules to "Set fiel to blank when related document deleted"



Admin

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

Products >		1 of 4 records in this list		
Product: Test 🔺 ACTIVE		🖉 Edit 🔹	•	
Product Details Health Authority Details	- Product Details		-	
User Role Setup (0) System Details	Product Name Test			
	Product Abbreviation			
	Generic Name			
	Current PI/Label Number	Products >	1	
	 Health Authority Details 	Product: Test 🚖 ACTIVE		🖋 Edit 🔹 🗢
2004	User Role Setup	- Product Details	Product Details Health Authority Details	
20R1	 System Details 	Product Name Test	User Role Setup (0) System Details	
		Product Abbreviation		
		Generic Name		
		Current Pillabei Number		•
		Health Authority Details		
		User Role Setup		19R3
		System Details		

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 to the Submissions Vault, the option to exclude overlays and signature pages now exists so the PDF will be clean for submission to the FDA
- Configuration
 - Admin > Settings > General Settings > CrossLinks

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





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

User Object Admin Page



 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

Business Admin Logs	rs & Groups Configuration Operations Deployment Connections S	Settings						
USERS & GROUPS	Users > User: Jake Roberts 🛧 Астіче		MANAGE Make User Inactive					
Active Delegations Groups	Delegations - General Info Activation Details							
Security Profiles Permission Sets	Name Jake Roberts	Title	Details Email Preferences User Role Setup (0)					
Application Roles	First Name Jake Last Name Roberts	Manager Image	Workflow Timeline Groups					
	User Name Jake.Roberts@csmdam.com	Language English	Delegate Access Security Overrides Veeva Support					
	Office Phone	Preferred Currency	Additional Functionality Includes:					
	Mobile	Locale United States	Resend Welcome Emails					
	Fax	Location	 Reset Passwords Configure Page Layout 					
			 Viewing and managing group membership Delegating access Viewing Security Overrides Providing Vault Support Access 					
			Creating Cross domain users					

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

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





	Send as Link Learn more	8
L	You can send this link to any users and groups in Vault, as well as to any external e	8
L	Add Recipients	
L	Olivia Cattington	•
L	ALL	
L	Beau Blanchard beau.blanchard@veepharm.com	
L	Paul Brinley (Paul) paul@veepharm.com	
L	Olivia Cattington Olive@veepharm.com	11
	La Olivia Cattington - Manager	
L	Josh Dempsey jdempsey@veepharm.com	
L	Owen Eribo owen@veepharm.com	
	Mansa Gills mansa@veepharm.com	
	Megan Murray megan@veepharm.com	
L		
L		11
	Send a copy to myself	
	Cancel Ser	nd

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 > Material Review & Approval > States > Approved for Production									
	Details	User Actions	Security Se	ttings	Entry Criteria	Entry Actions			
Entry Criteria 🔞									
Rules									
Always				Subm	te that ission Required? ent has been uplo				
If Country equals United St	tates			Materi	te that ial Type is not bla mination / Publica		lank		
If Country includes France,	, Italy, Spa	in, United Kingo	lom	Rendi	te that tion Production F tion Distribution				
If Meeting Required? equal	s Yes				te that w Meeting is not t	blank			
Always					te that nt is not checked	out			

Entry Criteria: Content Must Not be Checked Out

Configuration

– Admin > Configuration > Document Lifecycle > [Lifecycle] > States > [State] > Entry Criteria > Edit

Document Lifecycles > Material Review & Approval > States > Approved for Production										
Details User Actions Security Settings Entry Criteria Entry Actions										
Always Oconditional Validate that										
Content is not checked ou Add criteria										

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





Multi-Document Workflows

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]

lulti-document Workflows > Review > _egal Review	
Details	
Label*	Legal Review
Name*	legal_reviewC
Type*	Document Task
Description	Review and provide feedback
Next Steps	Review Join 🔇 🗸
Document Task Options	
General Settings	
Task Label*	Legal Review
Assign Task To*	Legal Reviewers
	• Assign to all users in participant group
Instructions*	Make available to users in participant group
Instructions	

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
- 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
 - If the workflow uses the 'Roles Allowed to Participate' setting, Vault will only allow users who belong to the specified role in all content documents to be selected when starting, adding, or reassigning participants to a workflow task

									-	
« Back to Report	Help: Wellness Every Day (v0.1) 🛨 1 DRAFT						¢.~],	
You have a task on an act	tive multi-document workflow.									Workflow Participant ar
	Draft	Review	Approval		FDA Submission	Approved for Use	Reapproval	D	Γ	Task controls are access
	(V0.1) Review Maria Ruoto Stanter: 21/30200 12:42 AM EST View Workflow History Report			+ A	Add Participants Cancel Workflow	ST	Reassign Cancel Task	a- a-		from the Timeline viev
	(v0.1) Simple Review and Approval Cancelled: 2/12/2020 10:58 PM EST				0 Complete Tasks of 1 Tasks					
	(v0.1) Simple Review and Approval Cancelled: 2/12/2020 10:56 PM EST				0 Complete Tasks of 1 Tasks					
DRAFT	(v0.1) Created Document Created by Maria Ruoto 1/29/2020 11:14 AM EST									

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

Details		
Label*	Review	
Name*	reviewC	
Туре*	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 doc	um
	Prompt for Verdicts Multiple Verdicts: One verdict for each document	



Object Lifecycles

Advanced Criteria for Entry Actions on Related Records

Overview

- Vault Admins can configure Change Related Object Lifecycle State entry actions with conditions that control which related records are impacted based on the related record's state
- In this example, when I initiate review on a claim record the related Match Text Variation (MTV) records move into an In-Review State, unless the MTV record is withdrawn





- Use Case
 - Organizations can leverage this enhancement to ensure Claims records and their related Match Text Variation records are in sync while moving through an approval process

Advanced Criteria for Entry Actions on Related Records



• Configuration

– Admin > Configuration > Objects Lifecyle > [Lifecyle] > [State] > Edit Entry Action

	Object Lifecycles > Claims Lifecycle > In Review > Entry Actions	
	Always Perform with conditions perform actions	
	Change related object lifecycle state	
	Related Object* Match Text Variations	
	Change State To* In Review	
ited records	Conditions On Related Records	
ide or	Exclude related records in the following lifecycle states Include related records in the following lifecycle sta Exclude related records in the following lifecycle st	
ate(s)	Related Record's State* Withdrawn & Approved	

- Enable conditions on related records
 Set the condition to Exclude or Include related records
- Select the appropriate State(s)

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



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

Lookup Field on Lifecycle State

- Overview
 - Vault Admins can now create Lookup-type fields that reference the Lifecycle State (state___v) field on related Objects
- Considerations
 - A Lifecycle State lookup field is not available for use in layout rules
 - The related object must have an assigned Lifecycle to use Lifecycle State as a Lookup-type field
- Use Case
 - Organizations can set up fields that allow users to view states of related objects

Users > Orville Mills > Review Meetings >		Meeting Cool	rdinator (Orville Mills	
Review Meeting: MEETING-000001 🌟 Planned		r User Lifecyc	cle State	Orville Mills	
✓ Meeting Details				Email	orville.mills@veeva.com
Meeting ID MEETING-000001	Related Campaign Healthy Hearts Campaign			Company Title	Veeva Pharma CSM
Meeting Type Live Meeting	Meeting Date & Time 7/29/2019 10:00 AM EDT			Lifecycle State	Active
Meeting Duration 1 hour	Lifecycle Review Meeting			Employee ID Number	12345-OM
Product Cholecap	Lifecycle State Planned				22435_1513047
✓ Live Meeting Details				Profile Page	Orville Mills
Conference Room Location Conf Room 2	Meeting Coordinator Orville Mills Coordinator User Lifecycle Active State	Lookup Type field referencing the related record's Lifecyle State	_[Manager Manager User Lifecycle State	Roger Richards Active

Lookup Field on Lifecycle State



Configuration

– Admin > Configuration > Objects > [Object] > Fields > Create Lookup Field

Objects > Review Meeting > Fields > Create Field					
Step 1: Select the field type					
Text	۸ U	Use a Lookup field to get values by looking up through existing object re			
Number	L.	Lookup field is read-only. It displays values from related record and has			
Date DateTime	ty	type as Source field of related record. Learn more			
Yes/No					
Picklist					
Object					
Parent Object					
Lookup					
Formula					
Currency	Ψ				
Step 2: Choose label and name for the field					
Label*		User Lifecycle State			
Name*		user_lifecycle_statec			
Step 3: Set the options					
Status ACTIVE					
Lookup Relationship*		User (meeting_coordinatoror)			
Lookup Source Field*		•			
		Lifecycle			
		Lifecycle State			



Multichannel

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



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
- This only impacts iPads with a 10.5" screen or larger
- Content creators cannot set the display resolution for pdfs, images, videos, or any CLM content generated via Single Doc Publishing or Create Presentation
 - These types of content automatically display in the device's default resolution
- Updates need to be made in Vault, CRM configuration, and the Vault to CRM integration mappings
- Configuration
 - Admin > Configuration > Document Fields > Shared Fields > iOS Resolution
 - Edit > Status: Active > Save





Inactive

Status
</k>



Resources

Resources

- Contact your Customer Success Manager
- Email: <u>VaultCustomerSuccess@veeva.com</u>
- Vault Resource Library: <u>https://support.veeva.com/hc/en-us/articles/360013243773-</u> <u>Veeva-Vault-Educational-Resource-Library</u>
- Vault Help: <u>http://vaulthelp2.vod309.com/wordpress</u>



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: <u>https://www.veeva.com/vault-promomats-standard-metrics</u>
 - 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)

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

Download FAQ >

FAO
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	Outbou + Create	nd Package	s 🕜			
	Name 🔺		Summary	,	Owner	
Sandbox Vaults	PKG-0002		Migration r	mode	Maria Ruoto	
MIGRATION	PKG-0004		Export Obj		Maria Ruoto	
Outbound Packages			including C	Dbject		
Inbound Packages		Create Out	bound Pac	kage	8	
		Select Outbo	und Package	Туре.		
		Test Data			•	
commend		Migration				
cords betwee	n 📔	Test Data				
ne						



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*	l	Created Date	
	11	Last Modified Date	
Description			
Test Data User			

Outbound Packages > PKG-0004 > New Dataset ?							Outbound Packages > Test Data: PKG-0	004 🚖 ACTIVE	
-							- Details		
Dataset Configuration		Outbound Packages >						Name PKG-0004	Outbound Package Type Test Data
		Test Data: PKG-0004	ACTIVE				Su	mmary Export Object data, including Object relationships between two Vaults	Owner Maria Ruoto Created Date 2/12/2020 5:03 PM EST
Primary Object *	Related Obj	- Details					Desc Test Dat		Last Modified Date 2/12/2020 5:03 PM EST
Country (country_v)	Product Cou		PKG-0004 Export Object data, includi	ng Object relationships	Outbound Pa	ackage Type Test Data Owner Maria Ruoto	▶ Data	a User	
* Add Related Object	+ Add R	Description	between two Vaults			Created Date 2/12/2020 5:03 PM E:	✓ Packages		
		Test Data Use	r		Lange Her		초 Download All 초 Uplo	bad	
		- Data	Q				34820_PKG-0004.vpk		📩 🌣 マ 📝 02/12/2020 17:05 Exported by: Maria Ruoto
		+ Add Dataset -	Object Name	Object Label	Action	Key Field	1-3 of 3 Key Field Label		
		DSET-00004	country_v	Country	Create				
		DSET-00004 DSET-00004	product_countryc productv	Product Country Product	Create				

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

USERS & GROUPS	Domain Users 🚱			
Vault Users	All Users - All Us	ers Search Name	Q	
Domain Users	All Users			
Active Delegations	Current Domain	User Name	Domain Status	Last Login
Groups	Cross-Domain	@vpmdemo.com	Inactive	
Security Profiles	Current Vault 17R2 PromoMats Base	icon-001@vpmdemo.com	Active	11/9/2017 4:36 PM EST
Permission Sets	18R2 Vault	medical2@vpmdemo.co	Active	
Application Roles	18R3 Uniclin (2)	m		
	19R1 RIM Publishing 19R3 Publishing	medical3@vpmdemo.co m	Active	
	19R3_QualityOne 2019-01 RIM 20R1Checklist	not.applicable@vpmdem o.com	Active	
	AlQualityOne APM eTMF	ViewBased1@vpmdemo. com	Active	
	APM Quality Asi's Clinical Vault	Gannie.Aaron@vpmdem o.com	Active	
	Abercrombie, Regan	Regan.Abercrombie@vp mdemo.com	Active	
	Abraham, Amy	amy.demo@vpmdemo.co m	Active	12/2/2019 1:52 PM EST
	Abrams, Coriss	Coriss.Abrams@vpmdem o.com	Active	



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 <u>Configuration</u> <u>Migration Packages</u>
- 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

License Type*	•	Last Modified By	
Security Profile*	ත	Last Modified Date	
	Domain Admin	Last Login	
Status		Security Policy	đ
Federated ID		Salesforce	
Created By		Username	
Created Date			

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

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 PS	r l
Last Modified Date	2/19/2020 9:55 PM PST	Security Policy	Basic	Yes/No field is system managed and read only
License Type	Full User	Salesforce Username		
Security Profile	Vault Owner		System Owned Use	er
	Domain Admin			

• 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 Histor	ту 😮			
Quick history	Date range	to		
Select time period V	12/1/2019	12/31/2019	Get His	tory
Showing overte for 42/4/204	0 to 40/24/2040 (244 results)			
Showing events for 12/1/2015	9 to 12/31/2019 (341 results)			
Timestamp (M/d/yyyy)	User Name	Source IP	Туре	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	8
Source W Standard	
Label*	
Base Document	
Name	
base_documentv	
Description	
Document Number Format	
VV-{#####}	
Field truncates at 60 resolved characters	
Document Name Format (Not inherited from parent. Remove override)	Note: this rendition type does not
Use File Name Use custom format	require configuration. It will be
	automatically added to the base
Available Lifecycles*	
General Lifecycle 🔇	document type in 20R1 and cannot
	removed
Rendition Types	
	endition 😮 Custom Thumbnail 🚷 👻
Panoramic Thumbnail 🔇 Veeva Distribution Package 🔇	
	Cancel Save

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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	Туре	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

The by valie b and select	Login Audit History			
	Before: Date ranges were limited.	Quick history Select time period Please enter a valid date	Date range to 1/1/2020 2/12/2020 The time period can not exceed 2 weeks	
Login Audit History 🕢				
Vauit ID equals	3012		Apply	After: Date range is omitted with ability to filter by Vault ID indefinitely.

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Minor Enhancements



Truncate Long URLs 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 custome schat request it through Verra Support. Users can u, that the language Vault uisplays 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 statev Support This feature introduces the following nev_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 statev. Previously, formulas could only access the label with Text(statev).	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.
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Thank you