

Veeva Commercial Vault MedComms 20R2 Deep Dive

July 2020





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Self Serve Recording Navigation

The screenshot shows a video player interface. On the left is a dark sidebar with the Veeva logo at the top. Below the logo, the text reads "20R2 MedComms Vault Release Deep Dive" and "8m 20s". Underneath is a "CONTENT" section with a red underline. It lists sections: "Introduction", "01. Veeva Commercial Vault ..." (00:05), "02. Presenters" (00:05), "03. Self Serve Recording Navl..." (00:05), "04. 20R2 Key Dates" (00:05), "Announcements", "05. Announcements" (00:05), and "06. EU Summit" (00:05). At the bottom of the sidebar is the "BRAINSHARK" logo. The main video area has an orange background with the text "Veeva Commercial Vault MedComms 20R2 Deep Dive" and "July 2020" in white. The Veeva logo is centered at the bottom of the video area. At the bottom of the player is a control bar with a red play button, a progress bar showing "00:04 / 00:05", and a "1 / 100" indicator. There are also icons for volume, settings, and full screen.

- Use the panel on the left to navigate between features and demonstrations
- Both sections and features are labeled for your convenience

20R2 Key Dates

Dates	Event
July 13	(all PODs) Pre-release vaults available
July 13 – 17	Validation package available on VeevaDocs July 13: System Release Memo July 14: Compliance Documents July 17: Executed OQs
July 16	Veeva Commercial Vault 20R2 Developer Release Deep Dive https://veeva.zoom.us/webinar/register/WN_1vHoZYNRrRqytWiSxODJMzA
July 20	20R2 Release Kit Includes 20R2 Brainshark Recording
July 28	20R2 MedComms Q&A Session https://veeva.zoom.us/webinar/register/WN_gXrj1EZATCWyGnZT97w6cg
July 29	20R2 EU PromoMats Q&A Session https://veeva.zoom.us/webinar/register/WN_ebl_MtAMS3KIBjr3Vxmycw
July 30	20R2 NA PromoMats Q&A Session https://veeva.zoom.us/webinar/register/WN_59KMkJLLRoODkBgdQYTSKA
July 31	Release to all limited release PODs and PODs VV1-8, VV1-1065, VV1-1068, and VV1-1088 <i>Vault File Manager does not release at this time, and instead releases with the general release PODs</i>
August 7	Release to applicable general release PODs





Announcements

3000+

attendees from
life sciences

250+

life science
companies

Hear Latest
Technology
Innovations

Get Best
Practices

Connect &
Collaborate

Join our European
Community

— Veeva Commercial & Medical Europe —
SUMMIT ONLINE

17 - 18 November 2020

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Medical

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Data & Intelligence



Veeva & U – Your Commercial Innovation Hub

Veeva & U Webinar Library

Show All

Best Practice

Content Reuse

Deep Dive

Key Features

MedComms



Vault MedComms: Enable Effective Virtual Collaboration

Discover and share the latest approved scientific content for more effective HCP engagements.

[Learn More >](#)



MedComms Medical Inquiry Management

Unifying medical content management and medical inquiry management for more efficient scientific communications.

[Learn More >](#)



Vault MedComms Medical Inquiry Education Session

Discover more about Vault MedComms Medical Inquiry with our Veeva experts.

[Learn More >](#)





CRM: UI WebView Support

CRM: UI WebView Support Ending in 20R2

- CLM content currently renders on iPad using Apple's old HTML rendering engine
 - Old version UIWebView will be removed by Apple in iOS 14 (likely September 2020)
 - Veeva will also remove support for UIWebView in 20R2 (targeted 13 August 2020)
- Veeva CRM will exclusively support Apple's newer HTML rendering engine
 - All CLM content will render using WKWebView with the 20R2 release
 - Veeva has supported and recommended WKWebView since iOS 10
- Considerations for preparation
 - Use the [evaluation app](#) to test content and determine if changes are necessary
 - No additional configuration is required
 - No other content types (e.g. PDF, Video, Images) impacted
 - Vast majority of content renders flawlessly in WKWebView based on feedback from customers who have already completed this process





Auto-On: Annotations



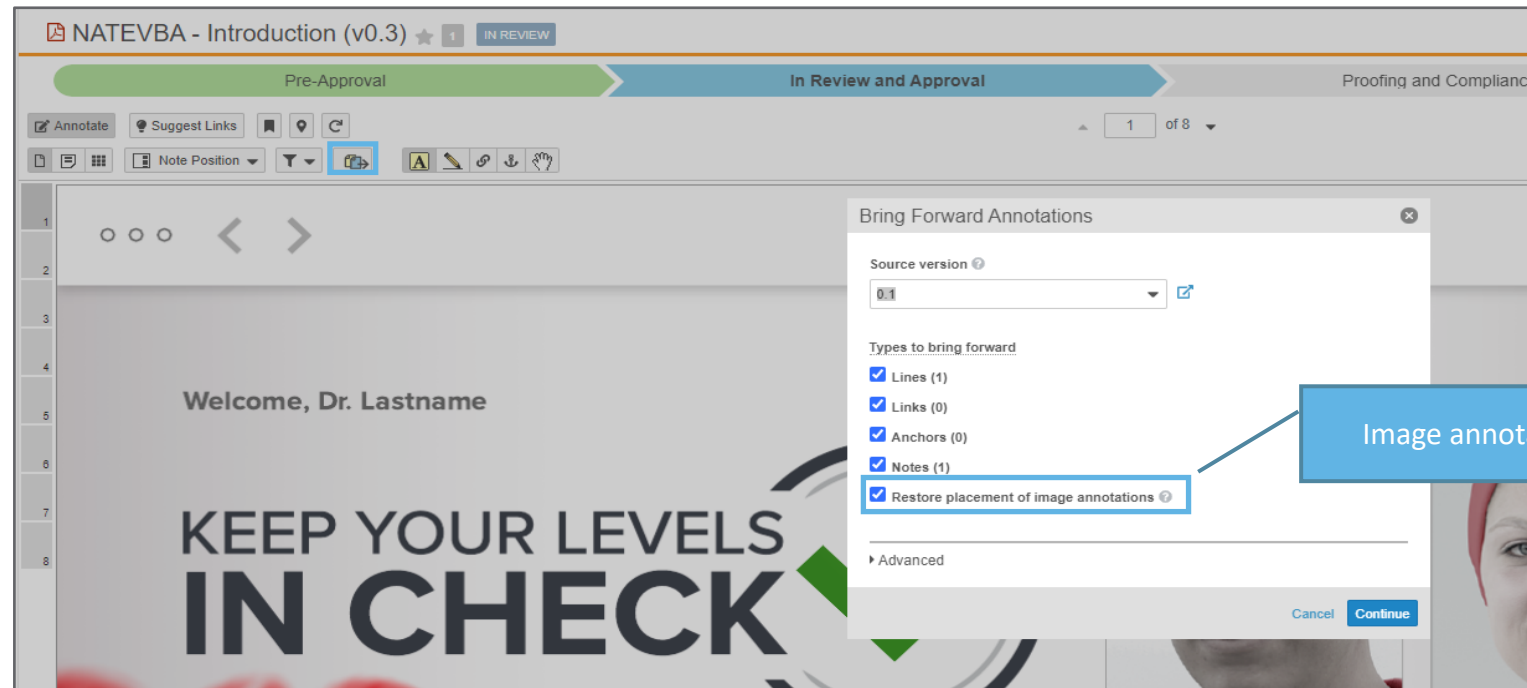
Auto-Place Brought Forward Image Annotations

- Overview

- Image annotations (sticky notes, lines, notes, links, and anchors) can now be brought forward and placed based on page and coordinates in the source version

- Considerations

- If the coordinates or page do not exist in the new version, Vault places the annotations at the page level
- Brought forward image annotations can be moved or left at page level



Indicate When Annotations Hidden by Filters

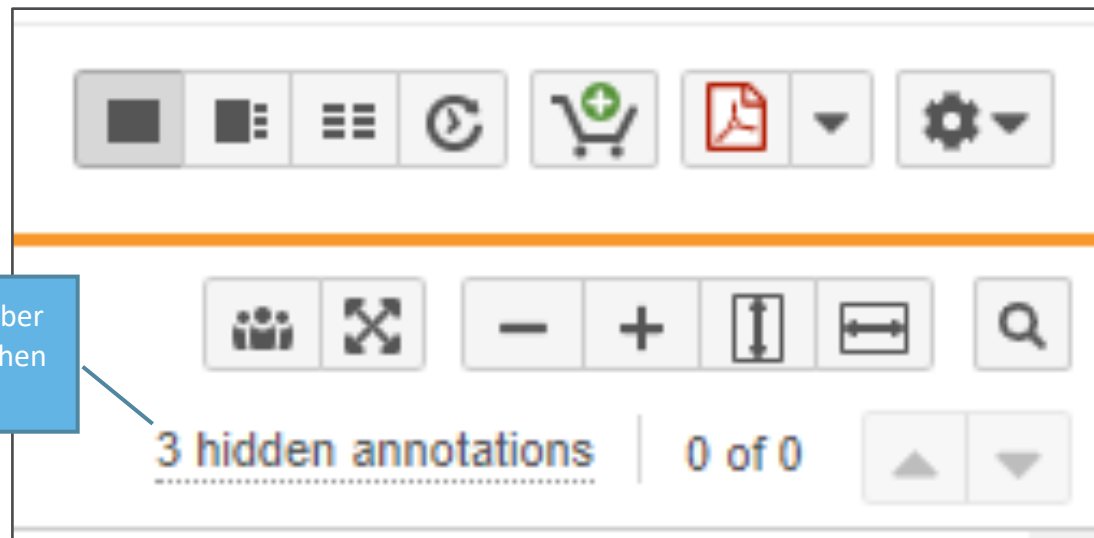


- Overview

- When viewing a document that has annotations hidden by the Annotate filter setting or by the Info Card's Hide button, Vault will now display an alert message that includes a count of the currently hidden annotations

- Considerations

- The message count is limited to 99
 - If there are more than 99 hidden annotations Vault will display '99+'
- The count will update when annotations are created, hidden, unhidden, or deleted



Alert displaying the number of hidden annotations when in Annotate mode

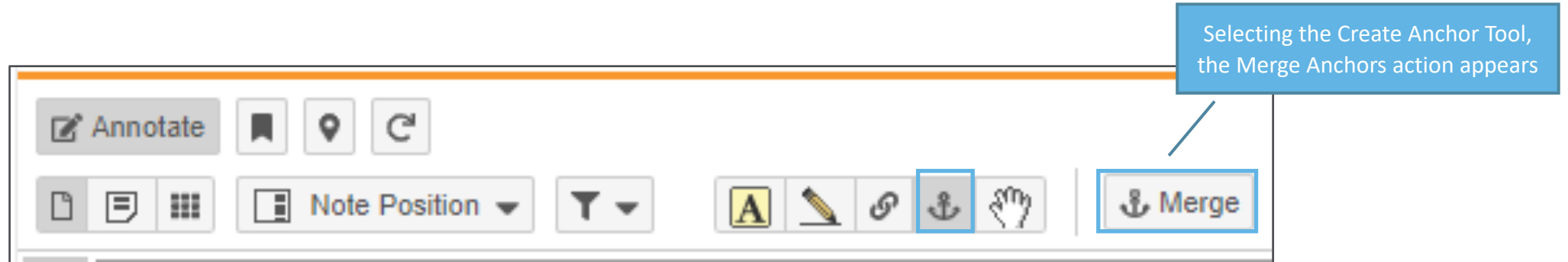


Move Merge Anchors to Create Anchor Tool



- Overview

- When users select the Create Anchor tool, the Merge Anchors action now appears



- Considerations

- The Merge Anchors action will no longer appear when users select the Link tool



Auto-On: Filtering/Search



Minimum Match Logic: Strict Matching

- Overview

- In order to return a more precise set of search results, Vault’s minimum Match Logic has been set to default to Strict Matching:
 - Searches with 1-2 terms will require all terms to match
 - Searches with 3-4 terms require all but 1 term to match
 - Searches with 5+ terms require all but 2 terms to match

Search Terms:	Search Result Must Include:			
Cholecap Efficacy	Cholecap and Efficacy			
Cholecap Efficacy Safety	Cholecap and Efficacy	Cholecap and Safety	Efficacy and Safety	
Cholecap Efficacy Safety MOA	Cholecap and Efficacy and Safety	Cholecap and Efficacy and MOA	Cholecap and Safety and MOA	Efficacy and Safety and MOA



Minimum Match Logic: Strict Matching



- Configuration

- This feature is Auto-on but can be turned off by Admins: Admin > Settings > Search Settings > Match Settings > Uncheck 'Enable Strict Matching'

Match Settings

Enable Strict Matching

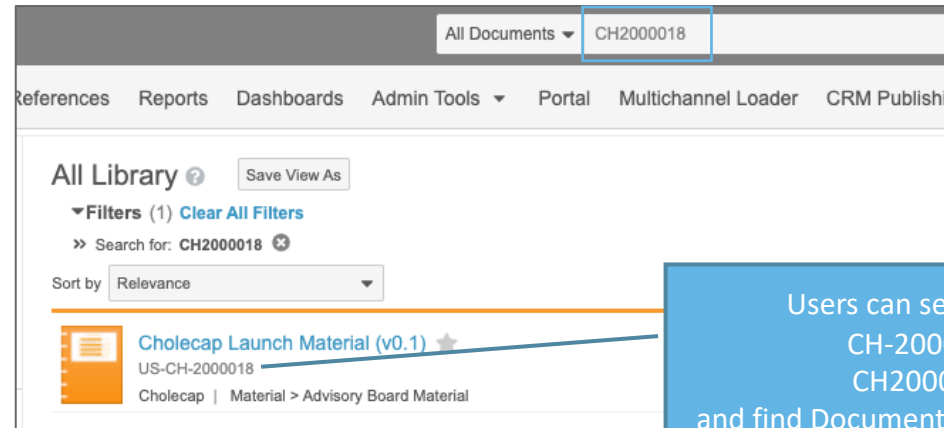
Cancel **Save**

Enhanced Document Number & ID Search



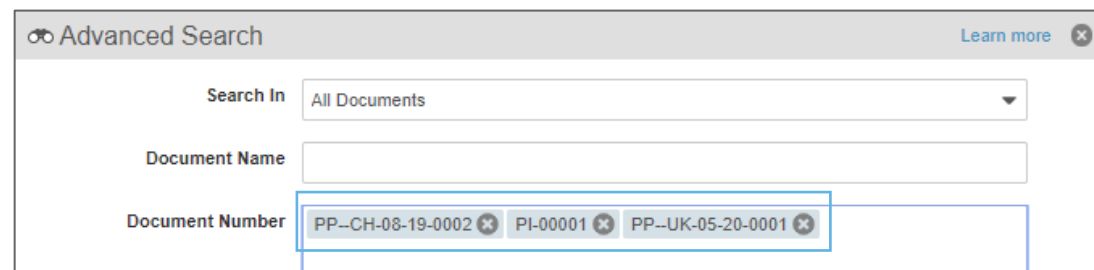
- Overview

- Users can now search by partial document number:
 - Searching for the beginning, middle, or end of a document number will result in a match



Users can search with
CH-2000018
CH2000018
and find Document US-CH-2000018

- Users can now search for multiple documents based on different document numbers in Advanced Search





Auto-On: Reports



Or Filter Logic

- Overview

- OR logic is now available between filters or prompts when building reports
- The Advanced Logic feature allows users to determine whether AND or OR logic should apply between 2 filters or prompts

- Use Case

- Create a report that includes documents with a reapproval date in the past 30 day or next 30 days, with a prompt to filter by Product

User can edit the formula using numbers next to the filters, and add parenthesis to group certain filters together

The screenshot shows a report configuration interface for "Documents requiring Reapproval by Product". It includes sections for PROPERTIES (Report Type: Document), CONDITIONAL FIELDS, and FILTERS. The FILTERS section contains three items: 1. Reapproval Date is in the last 30 days, 2. Reapproval Date is in the next 30 days, and 3. Product equals. Each filter has a "Prompt" checkbox. Below the filters is an "Advanced Logic" section with a text input field containing the formula "(1 OR 2) AND 3". A "Validate" button is located below the input field. A "Remove" button is also present next to the "Advanced Logic" label. The interface also includes "Cancel", "Run", and "Save" buttons at the top right.

Validate button checks the syntax



Or Filter Logic

- Considerations
 - **AND** operations are evaluated before **OR** operations by default
 - Users can add parenthesis to group certain filters together and determine which logic is evaluated first
 - The connector **OR** cannot be used between fields on different objects
 - Some filters are ineligible for advanced logic and will not have a corresponding number.
 - These filters include roles (*Approver, Owner, etc.*), formula fields, and relationship constraints
 - Reports that use advanced logic cannot be exported from the reports list page
 - You can still export it while the report is open
 - The following report types do not support advanced logic:
 - Workflow
 - Multi-pass
 - Document relationship
 - Binder
 - R&U

Include Prompts with Filters in Report Builder



- Overview
 - The ability to create Prompts has been moved to the Filters section of the Report Builder
- Considerations
 - To convert a Filter to be a Prompt, users now simply need to tick the Prompt checkbox

The image shows two screenshots of the 'Task Due by Date' report configuration interface. The left screenshot shows the 'Before' state where filters and prompts are in separate sections. The right screenshot shows the 'After' state where prompts are added to the filters section.

Before: Prompts applied to Reports in separate section

The left screenshot shows the 'Task Due by Date' report configuration. It has sections for 'PROPERTIES', 'CONDITIONAL FIELDS', 'FILTERS (optional)', and 'PROMPTS (optional)'. A filter for 'Workflow > Task Owner' is set to 'Helena Geist'. A prompt for 'Workflow > Task Due Date' is set to 'equals'. A blue box highlights the 'PROMPTS (optional)' section with the text: 'Users will be asked to enter these field values each time they run this report.'

After: Add prompts to report under Filters section

The right screenshot shows the same report configuration, but the 'PROMPTS (optional)' section is no longer visible. The 'FILTERS' section now contains two entries: 'Workflow > Task Due Date' set to 'equals' with a 'Prompt' checkbox checked, and 'Workflow > Task Owner' set to 'equals' with a 'Prompt' checkbox unchecked. A blue box highlights the 'Prompt' checkbox for the 'Task Due Date' filter with the text: 'After: Add prompts to report under Filters section'.



Auto-On: Audit



Individual Audit Filters

- Overview

- Users can now apply event and user filters to individual Document and Object Audit Trails, allowing them to more easily find specific activities

- Use Case

- Filter audit trail to include each time document was checked out for revisions or to include each time a specific user accessed the document

- Considerations

- You can filter by multiple users but not user groups
- You can add multiple filters
- These filters were previously only available to Admins

Audit trail for document US--2000097

Timestamp is in the last Day

Event in Checkout

User in Start typing to see a list of users...

Apply

Showing events for 5/7/2020 to 5/8/2020 (2 results)

Timestamp (M/d/yyyy)	User Name	Version	Event Description
5/8/2020 2:16 PM PDT	helena.geist@vv-csm.com	0.2	Checked out
5/8/2020 2:13 PM PDT	george.glass1@vv-csm.com	0.1	Checked out



Multi-Document & Object Workflows

Variables for Multi-Document & Object Workflows



- Overview

- With this feature Admins can define a text, picklist, or yes/no variable within a Multi-Document or Object Workflow and use the variable answer as a basis for a decision step

- Use Case

- Create one workflow which incorporates variables at the start and branches based on the answer
 - Is training required? Y = branch to create a training user task

- Configuration

- Admin > Configuration > Multi-Document Workflows > [Workflow] > Edit Start Step

Multi-document Workflows > Create Workflow

Details

Label* Review Workflow

Name* review_workflow

Document Lifecycle* Any document lifecycle

Status **Editing**

Description

Variables

Variable 1

+ Add Variable

Text Yes/No Picklist

New section on Workflow Details Page where you create Variables

Control 3 Variable

Variables

Training Required?

+ Add variable

Use Variables in the Control of the Start Step

Start Multi-document Workflow

Description* Review Documents - 7/8/2020

Please start the review workflow.

Reviewer* Helena Geist

Training Required?* Yes No

*Required to proceed

Cancel Start

Variables can be required or not and can be used to branch your workflow

Confirm Training

Confirm you have attended training prior to approving these documents.

Verdict* Confirmed- I have attended training

Please enter your credentials to e-sign.

Capacity*

User Name*

Password*

*Required to proceed

Cancel Complete

Additional tasks can be sent to participants based on response to variables



Multi-Document Workflow: Execute Entry Action & Entry Criteria When Cancelling Workflows or Removing Documents

- Overview

- When a MDW is cancelled, in addition to moving the document to the Workflow Cancel State, Vault will now execute entry actions and entry criteria allowing for:
 - Details such as Cancellation Date to be captured
 - Values that were set during the workflow process to be reset

- Use Case

- You can configure an Entry Action that resets the ‘Review Cycle Start Date’ if you cancel your Review Workflow

- Considerations

- Veeva Support can disable this feature
- This enhancement does not apply to traditional, single Document Workflows
- Administrators can configure the *Cancel Workflow State* to be either the ‘state in which the workflow started’ or a specific state in a document lifecycle

Auto-Number Envelope Record for Multi-Document Workflow



- Overview

- Within a Multi-Document Workflow, Admins now have the ability to configure Vault to automatically generate a name for the Envelope record
- This auto-naming can use any string of text and a token that generates a unique number
 - For example, Review-{#####} would generate “Review-000001”

- Use Case

- Customers who generate a number of Multi-Document Workflows a day have the option to let Vault auto-generate the envelope name with a unique identifier to easily identify each envelope record

When the Workflow Initiator starts the workflow, the system-generated envelope name will display as a read only value

Start Multi-document Workflow

0.1

Description
Review-000001

You are about to start review for multiple documents. Please complete the following fields to begin this workflow.

Medical Reviewers

Legal Reviewers

Regulatory Reviewers

*Required to proceed

Cancel Start



Auto-Number Envelope Record for Multi-Document Workflow



- Considerations
 - Veeva Support Enabled
 - Format: [string of text-{{#####}}] similar to Vault Object Framework system managed record name
- Configuration
 - Once enabled by Veeva Support
 - Admin > Configuration > Multi-document Workflows > [Select Workflow] > Envelope Details > Edit

Auto-naming can use any string of text to suit your business needs e.g. 'Document Review' or 'Review'

▼ Envelope Details

System generates envelope name

Value Format*



Support Priority Multi-Document Workflow Fields in Reports

- Overview

- Task Verdict Comment and Task Verdict Reason fields from multi-document workflows are now available in Workflow with Document reports
- Task Verdict Comments has been added as a default field to the Workflow History report

- Use Case:

- Create a report to assess Task Verdict Comments or Reasons outlining why a document has not been approved in the workflow task

Legal Review

Please review and apply verdicts for all documents, then click the complete button for this task to finalize your review.

Verdict*

Approved

Not Approved

Additional Comments*

Update end matter

*Required to proceed

Document task

Please review and apply verdicts for all documents, then click the complete button for this task to finalize your review.

Verdict*

Approved

Not Approved

Reason not approved:

Missing annotations or references

Incorrect medical content

Other

Multiple Document Workflow Verdicts report ★

Report Type: Workflow with Document

FILTERS (3)

Expand all Collapse all

Workflow Name	Document Name	Task Name	Task Owner	Task Verdict	Task Verdict Comment	Task Verdict Reason	Lifecycle
Document Name: Anti-TNF Long Term Safety Study (2)							
References Review & Approval	Anti-TNF Long Term Safety Study (v0.1)	DT: Librarian Intake	George Smith	Approved for MLR Review			Reference Documents
References Review & Approval	Anti-TNF Long Term Safety Study (v0.1)	DT: Medical Review	Helena Geist	Not Approved	Duplicate reference		Reference Documents
Document Name: Patient Kit Brochure (3)							
MLR Multi-Document Review	Patient Kit Brochure (v0.1)	Regulatory Review Task	George Smith	Not Approved			Material
MLR Multi-Document Review	Patient Kit Brochure (v0.1)	Legal Review Task	George Smith	Not Approved	Update end matter		Material
MLR Multi-Document Review	Patient Kit Brochure (v0.1)	Medical Review Task	Helena Geist	Not Approved		Incorrect medical content	Material
Document Name: Patient Kit Housing Unit (3)							
MLR Multi-Document Review	Patient Kit Housing Unit (v0.1)	Medical Review Task	Helena Geist	Not Approved		Missing annotations or references	Material

Returned 14 records

Identify patterns in reviewer Verdict Comments or Verdict Reasons picklist



New Workflow Cancel State Option: No State Change



- Overview:
 - A new 'Workflow Cancel State' option 'No State Change' is now available for both Multi-Document and traditional Document Workflows
- Configuration
 - To configure the 'Workflow Cancel State' to 'No State Change':
 - Admin > Configuration > Document Lifecycles > States > [Select State]

'No State Change' is available as a new 'Workflow Cancel State' option.

Offers flexibility in workflow configuration, such as avoiding triggering Entry Actions.

The screenshot shows the configuration page for a workflow state named 'In Review'. The page has tabs for 'Details', 'User Actions', 'Security Settings', 'Entry Criteria', and 'Entry Actions'. The 'Details' tab is active. The form includes the following fields:

- Label***: In Review
- Name**: in_review__c
- Source**: Custom
- Description**: (empty text area)
- Status**: Active
- Workflow Cancel State**: No state change (highlighted with a blue box)

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.



Collaborative Authoring

Collaborative Authoring: Alert Box for Documents Being Edited



- Overview

- When a user views a document which is being edited by another user using Collaborative Authoring, Vault displays an alert box which says:

Document is being edited. Click Edit to see the latest updates.

- Considerations

- This Auto-On feature only impacts Vaults utilizing Collaborative Authoring

The screenshot shows the Veeva Vault interface for a document titled "Cholecap Important Safety Information New (v0.2)". The document is in a "DRAFT" state and is checked out by "Jean Marie Schiraldi" on "5/4/2020 4:01 PM EDT". A blue callout box points to the document title, stating "The user currently editing the document is identified". A black alert box is overlaid on the document content, displaying the message "Document is being edited. Click Edit to see the latest updates." with a close button. A blue callout box points to this alert box, stating "New Alert Box". The document content includes sections for "INDICATION", "IMPORTANT SAFETY INFORMATION", and "Common side effects". The right sidebar shows document metadata such as "Name", "Document Number", "Subtype", "Country", "Product", "Lifecycle", "Reference Source", "Source Date", "Volume Number", "Page Range", "Authors", "Tags", "Created By", "Last Modified By", "Copy Depth", "Presenius Test", "Job Type", "Lifecycle State Stage ID", "Lifecycle Stage", "Global ID", "Global Version ID", "Document Link", "Document Version Link", and "Checked Out By".



Save Version to Vault Without Ending Collaboration Session

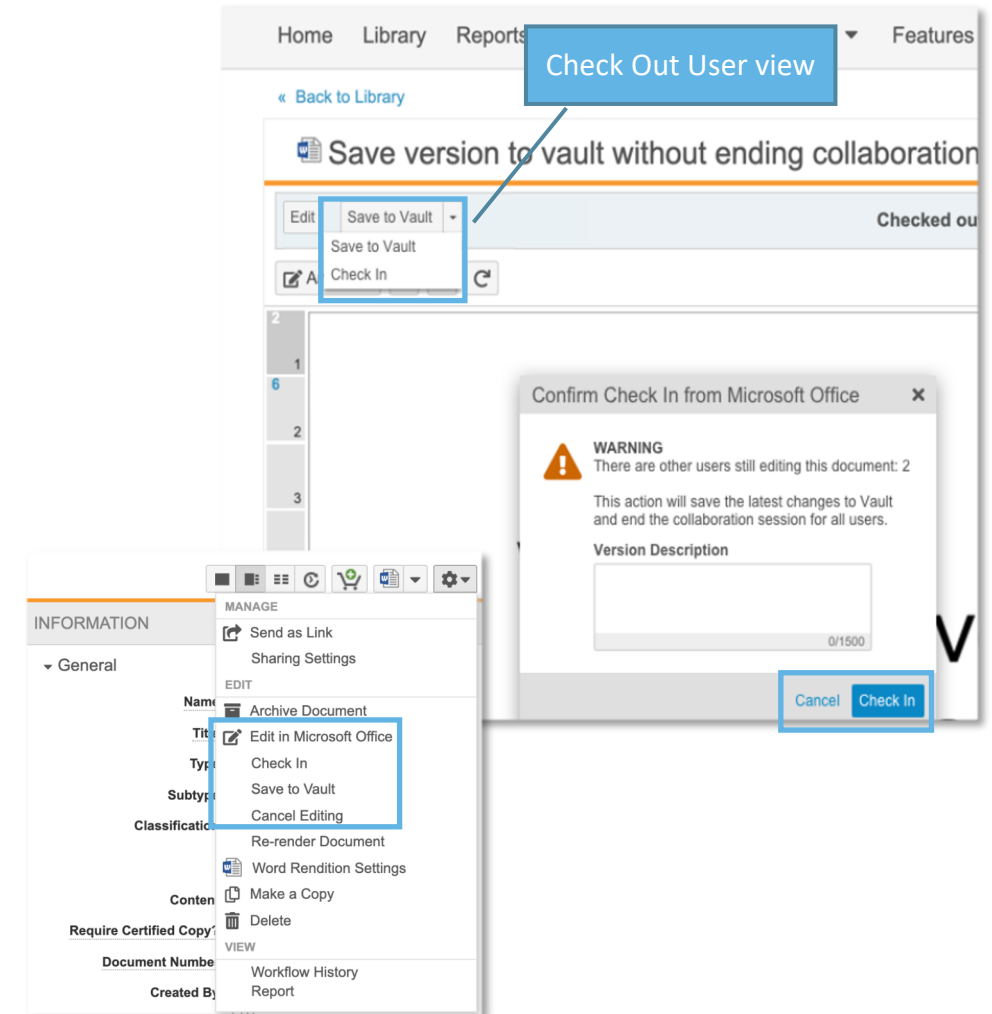


- Overview

- Users can now save the latest version of the document they are editing without ending the collaborative session for themselves or other users
 - The file will remain checked out to Microsoft Office 365, allowing collaborative editing to continue
- All collaborators will now get a notification and email when a collaboration session is ended

- Considerations

- Save to Vault
 - Creates a new minor version of the document
 - Can be used by any user with the Edit Document permission
- The Check Out User, Document Owner, and Vault Owners can use Check In in addition to Save to Vault
- Cancel Check Out does not delete versions created by Save to Vault





Vault File Manager

Configure Auto-Open Safelist for Vault File Manager



- Overview

- A new object called VFM File Security Policy controls which file extensions will open automatically when checked out to the Vault File Manager (VFM)
 - Prior to this release, VFM would attempt to auto-open any file checked out to the file manager
- A document checked out to the VFM will auto open if:
 - The file extension is listed on a File Security Policy record
 - The File Security Policy record is in an Active state

- Considerations

- Users will need to re-login to the VFM to get the latest auto open safelist from Vault whenever there is a modification made to the VFM File Security Policy records
- Users must have Read access to the object VFM File Security Policy in order for filea to auto open

The screenshot shows the 'All VFM File Security Policies' configuration page. A table lists various file types and their auto-open status. Two callout boxes provide additional context: one points to the 'File Extensions' column, stating that extensions not listed will not auto-open; the other points to the 'Status' column, stating that an inactive status prevents auto-opening.

Description	File Extensions	Policy Type	Status
Adobe Photoshop	psd	Auto Open	Active
Archive	rar, zip	Auto Open	Active
Audio	mp3, wav	Auto Open	Active
CSV	csv	Auto Open	Active
Image	gif, png, jpg, jpeg, tif	Auto Open	Active
Microsoft Excel	xlsx, xls	Auto Open	Active
Microsoft Powerpoint	pptx, ppt	Auto Open	Active
Microsoft Word	doc, docx, dot, dotx	Auto Open	Inactive
PDF	pdf	Auto Open	Active
Rich Text Format	rtf	Auto Open	Active
Video	m4v, mp4, mpg	Auto Open	Active

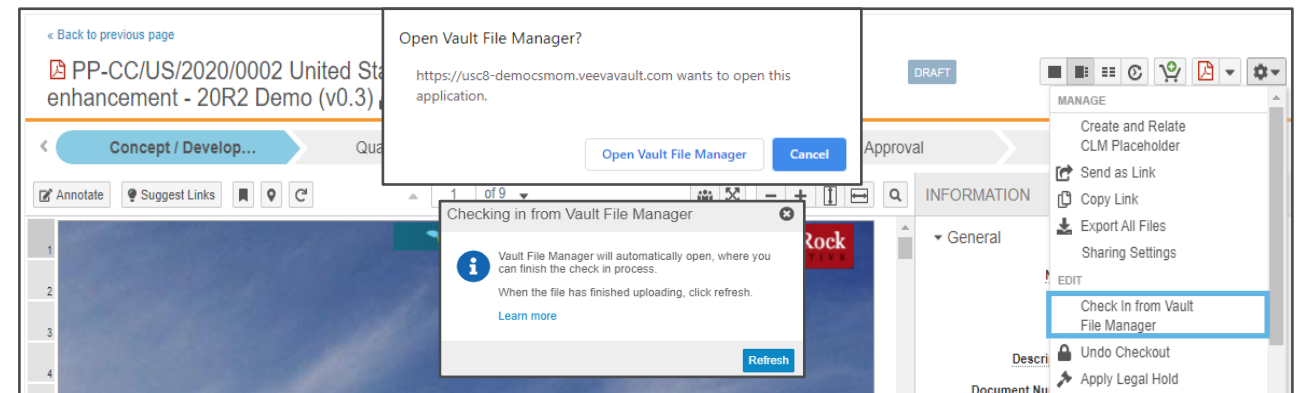
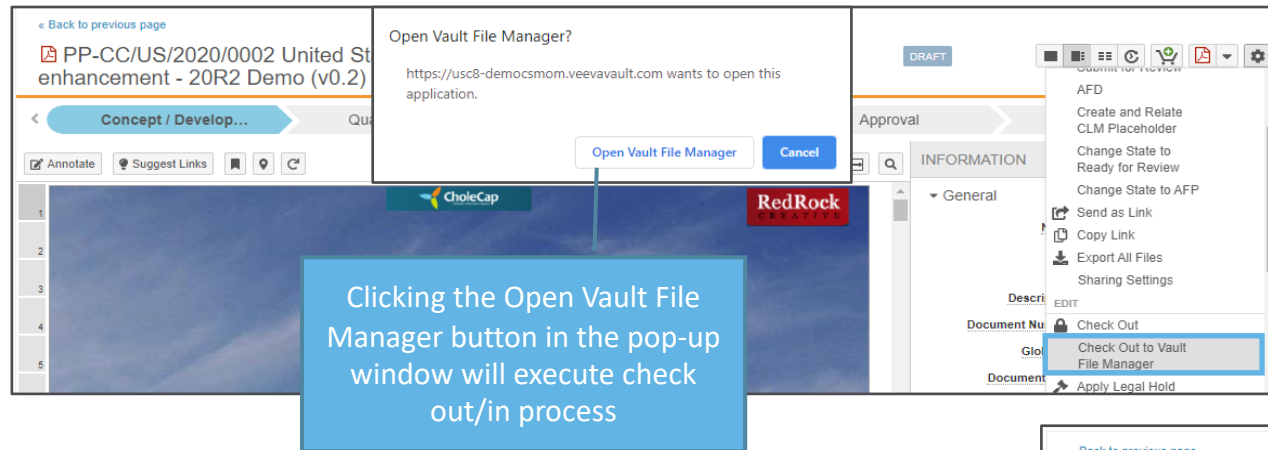




Vault File Manager: Check In & Check Out Enhancements

- Overview

- When users check out or check in a single document using Vault File Manager, Vault will no longer open a new browser tab
- VFM processes are now handled in the current browser tab using banners and pop ups





Archived Documents

Archived Document Security Enhancements



- Overview

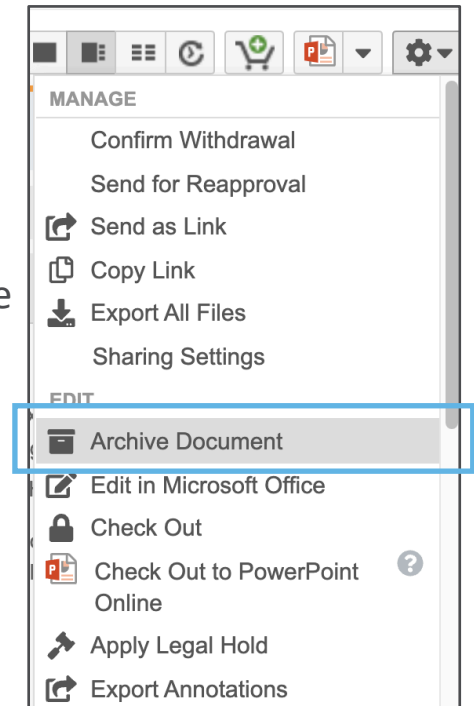
- As of this release, users will need a security profile with the Tab: Archive and the new Application: View Archive permissions in order to see archived documents
 - Users with the Manage Archive permission will automatically have the View Archive permission
 - Like before, users will also need to be in a document role that includes the View Document permission

	Manage Archive	User Filters	View Archive
Search	✓	✓	✓

- Once documents are Archived, documents cannot be edited
 - Some field edits can be made if in Migration Mode
- New user action to move documents in and out of the archive
 - Users with a security profile that grants the Manage Archive permission can now move documents into and out of the archive from an action in the document Actions menu
 - The Archive Document (Yes/No) field will still be available

- Considerations

- This feature is Auto-On for Vaults that have enabled Archiving (by Support)
- Users may lose access to archived documents until they are given the new View Archive permission after the upgrade





MedComms

Unified Medical Inquiry Case Intake Form



- Overview

- Unified Medical Inquiry Case Intake introduces a single unified form to improve the capture of Medical Inquiry Cases
- Users can create the case, enter details of the Case Request and Case Response if they are to process it immediately

- Considerations

- This feature must be enabled by your Administrator
- You can configure this to include additional fields you have added to your configuration on either *Cases*, *Case Request*, or *Case Response* records
- Data mapping from the Intake Form to the case records requires that you use the Vault API field name, not the field Label

Unified Medical Inquiry Case Intake Form



- Considerations
 - Mandatory fields on the *Case* object must be required on the Case Intake Form
 - You must configure a validation rule to ensure that mandatory fields on the *Case Request* and *Case Response* are also captured on the Intake Form
 - For more information on validation rules, search for [Configuring Record Validation Rules in Vault Help](#)
- Configuration
 - Admin > Settings > Application Settings > Medical Inquiry section > Enable Case Intake Form
 - Additional configuration is required to map to the Case Intake Form.
 - Information is available by searching Vault Help for [Configuring the Case Intake Form](#)

Unified Medical Inquiry Case Intake Form



Tasks **Cases** Verbal Responses Written Responses Medical Library Portal Reporting Other **+ Create**

▼ VIEWS **All Cases** Save View As 1-25 of 54 1 of 3

📁 All Cases
🕒 Recent Cases
★ Favorites

FILTERS
▶ CASE CONTACT
▶ CASE PRIORITY
▶ CLOSED DATE
▶ OPENED DATE
▶ RESPONSE SENT DATE

Name	Case Contact	Case Priority	Closed Date	Description	Opened Date	Requestor Name
CASE-000001	James Wilson	Standard	13/05/2019		13/05/2019	
CASE-000002	Karen Benson	Stan				
CASE-000003	Mark Sweeney	Stan				
CASE-000004	John Difilippo	Stan				
CASE-000005	Cheryl Ackerman	Stan				
CASE-000006	Karen Benson	Urge				
CASE-000007	Brian Aarons	High				

Tasks **Cases** Verbal Responses Written Responses Medical Library Portal Reporting **+ Create**

Case Intakes >

Create Case Intake

Cancel **Save + Create** **Save**

Case

Case Request
Case Response
System Details

Case

Case Contact* Opened Date

Requestor

Target Close Date

Origination Channel

Response Sent Date

Case Priority* Closed Date

Total Days to Close

Case Request

Product

Request Category

Request Details

Preferred Response Method

Case Response

Case Response Type

Response Notes





Admin



Notification Preferences

- Overview

- Admins can now configure a user's Task, User Mention, Send as Link, and Shared View notifications to be delivered in a summary email
 - When set to Summary, messages will be held and sent together at the next scheduled delivery

- Considerations

- Email preferences are controlled at the user level via the User Object record and can be set to: Never, Every Occurrence, or Summary
 - Email preference fields can be set via Bulk Update
 - Email preferences are Vault specific
- Admins can also control the following general Email Summary Settings:
 - The delivery frequency (1, 2, 3, 4, 6, 12, or 24 hours) – Initially set to 24 hours
 - Maximum Notifications per Type – up to 100 messages – Initially set to 20
 - The order that notification types appear in the email
- Messages in the summary email will be collated by notification type and displayed in chronological order
- If the Max Notifications per Type is exceeded, there will be a link to view the remaining notifications in Vault

Veeva Vault

You have received the following notifications from CC CSM DAM Demo Vault for 6/19/20 12:41:26 AM EDT

User Mentions

- Maria Ruoto** mentioned you in a comment on [Brochure Holder \(Copied from Brochure\)](#)
6/19/20 12:34:48 AM EDT
- Maria Ruoto** mentioned you in a comment on [CholeCap Indications and Usage](#)
6/19/20 12:32:39 AM EDT
- Maria Ruoto** mentioned you in a comment on [CholeCap Indications and Usage](#)
6/19/20 12:32:29 AM EDT
- Maria Ruoto** mentioned you in a comment on [CholeCap Indications and Usage](#)
6/19/20 12:32:24 AM EDT

Send As Link

- [CholeCap May Help You Manage Your Cholesterol](#) has been sent to you by Maria Ruoto.
6/19/20 12:38:07 AM EDT
- [Cholesterol Help with related sub-presentations 10](#) has been sent to you by Maria Ruoto.
6/19/20 12:37:47 AM EDT
- [Patient Information Leaflet](#) has been sent to you by Maria Ruoto.
6/19/20 12:37:28 AM EDT

Shared Views

- Maria Ruoto** has shared the following view with you in the **CC CSM DAM Demo Vault**: [VDP Promo Material](#)
6/19/20 12:36:29 AM EDT

Tasks

- You have been assigned the task "Verify Piece Meets QC Criteria" for the document: ["Brochure Holder \(Copied from Brochure\)"](#) (State: Pending QC).
Perform your task, then click Complete to proceed.
6/19/20 12:35:29 AM EDT
- You have been assigned the task "Regulatory Review" for the document: ["Patient Information Leaflet"](#) (State: In Review).
Perform your task, then click Complete to proceed.
6/19/20 12:34:18 AM EDT
- You have been assigned the task "Check the uploaded file" for the document: ["CholeCap Indications and Usage"](#) (State: In Coordinator Review).
Perform your task, then click Complete to proceed.
6/19/20 12:33:29 AM EDT
- The "Send to Content Creator" workflow for [CholeCap Indications and Usage](#) has been canceled.
6/19/20 12:33:04 AM EDT
- You have been assigned the task "Content Uploaded" for the document: ["CholeCap Indications and Usage"](#) (State: Draft).
Perform your task, then click Complete to proceed.
6/19/20 12:32:51 AM EDT

This message is automatically generated by Veeva Vault and sent from the CC CSM DAM Demo Vault vault: [csmdam-cc-csm-dam-demo.veevavault.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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Notification Preferences

- Considerations
 - Both Document and Object task notifications will be included
 - Email Settings can be viewed and [inline] updated from the User Object

Users ?

+ Create Active Users Search Columns Q

Name	Email	Title	Security Profile	Send As Link	Tasks	User Mentions	Shared Views
Maria Ruoto	maria.ruoto@veeva.com	Customer Success Manager	Vault Owner	Summary	Summary	Summary	Summary
Application Owner	dev.null@veeva.com		Vault Owner				
Janice Ruiz	janice.ruiz@veeva.com		Vault Owner				
Cindy DiNitto	cindy.dinitto@veeva.com						
Maria Owner	maria.ruoto@veeva.com						
Helena Geist	helena.geist@veeva.com						
Integration User	maria.ruoto@veeva.com		System Administrator				
Regan Ruoto	maria.ruoto@veeva.com	Director of Marketing	Submission Coordinators	Every Occurrence			
Jake Roberts	maria.ruoto@veeva.com		Submission Coordinators				
Quint Portal_Only	maria.ruoto@veeva.com	Account Executive	PromoMats User				
Cody Commenter	maria.ruoto@veeva.com		PromoMats User				
Cholecap Reviewer	maria.ruoto@veeva.com		PromoMats User				
Tony Tiger	maria.ruoto@veeva.com		Document User				
Pending User	maria.ruoto@veeva.com		Cholecap Reviewers				

Email Settings can be viewed and [inline] updated from the User Object

Never
Every Occurrence
Summary





Notification Preferences

- Configuration: Summary Email Settings
 - Admin > Configuration > Email & Notifications > Email Settings
- Configuration: Add the Shared Views, Tasks, User Mentions, and Send as Link fields to the Email Preferences section of the User Object Page Layout
 - Admin > Configuration > Objects > User > Page Layout > User Detail Page Layout > Email Preferences > Add

The image displays two screenshots from the Veeva system. The left screenshot shows the 'Email Settings' configuration page. The 'Email Summaries' section is highlighted with a blue box, showing four sections: Section 1 (Send As Link), Section 2 (Shared Views), Section 3 (Tasks), and Section 4 (User Mentions). Below this, 'Max Notifications per Type*' is set to 20, and 'Delivery Interval*' is set to 24 Hours. A blue callout box labeled 'Email Settings' points to the left sidebar. The right screenshot shows the 'Email Preferences' section of a 'User Object Page Layout'. A blue callout box labeled 'User Object Page Layout' points to the 'Add' button at the bottom of the list. The list contains several notification types, with 'Shared Views', 'Tasks', 'User Mentions', and 'Send As Link' highlighted by a blue box.





Notification Preferences

- Configuration: User Object Records
 - Admin > Business Admin > Users > [User Object Record] > Email Preferences

Users >

User: Maria Ruoto ★ ACTIVE

General Info

- Activation Details
- Details
- Email Preferences
- User Role Setup (22)
- Workflow Timeline
- Groups
- Delegate Access
- Security Overrides
- Veeva Support

Title Customer Success Manager

▶ **Activation Details**

▶ **Details**

▼ **Email Preferences**

- Service Availability Notifications
- Product Announcement Emails
- Favorite New Content
- Favorite Document New Status
- Favorite Document New Comment

Shared Views [Dropdown]

Tasks [Dropdown: Never, Every Occurrence, Summary]

User Mentions [Dropdown]

Send As Link [Dropdown]



Notification Preferences

- Configuration: Bulk Action
 - Admin > Business Admin > Users > Click Action Wheel > Perform Bulk Action

1-24 of 24 [Settings]

VIEW

- Edit Columns
- Truncate Cell Text

MANAGE

- Create Cross Domain User

PERFORM BULK ACTION

- All 24 records

EXPORT

- Text
- Excel

BULK ACTION

- Refine Selection
- Choose Action**
- Edit Details
- Confirmation

Choose Action (Step 2)

This change affects up to 24 records.

- Manage Records**
- Edit Fields

Manage Lifecycle

- Change State

User Mentions

Never

Every Occurrence

Summary

Click pencil to edit

Additional Operators for Document Lifecycle State Entry Actions, User Actions & Entry Criteria



- Overview

- The following operators for conditional state entry actions, user actions, and entry criteria in document lifecycles have been added to Vault:
 - The **is not equal to** operator is available for conditions based on Document Type, Subtype, or Classification
 - The **does not include** operator is available for conditions based on Document Type, Subtype, or Classification as well as all object reference fields

- Use Case

- Set an Entry Criteria for the Ready for Distribution state to exclude digital subtypes such as websites from requiring a Production Proof rendition

Document Lifecycles > Material > States > Ready for Distribution

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

Entry Criteria

Always Conditional

If Subtype is not equal to Material > Website

+ Add condition

Validate that Rendition Production Proof is attached

+ Add criteria

Additional Operators for Document Lifecycle State Entry Actions, User Actions & Entry Criteria



- Considerations
 - Previously, because Vault only supported **is equal to** and **includes** operators, Admins had needed to list all Document Types, Subtypes, or Classifications rather than just the exceptions
- Configuration
 - Admin > Configuration > Document Lifecycles > States > [Lifecycle State] > User Action/Entry Criteria/Entry Actions > Edit > Create Rule > Select Perform with Conditions > Set rule criteria & operator



Long Text Field Enhancements

- Overview

- Long Text fields can be edited using a pop-up editor window that provides a better user experience when working with a lot of text
- The entire Long Text Field value can be exported from the object list page
- Object Long Text Fields can now be created in the object field creation page

The screenshot displays a 'Details' page for an object with the following fields:

- Name: CL-000001
- Match Text*: Now approved for the treatment of hypercholesterolaemia in teenagers and young adults with familial hypercholesterolaemia
- Product: Cholecap
- Country: United States
- Lifecycle: Claims Lifecycle
- Lifecycle State: Approved
- Category: [Dropdown]
- Claim Risk: Medium
- Created By: CSM U
- Created Date: 11/15/2
- Last Modified By: System
- Last Modified Date: 2/25/20
- Status: Active
- Claim Restrictions: [Empty field with edit icon]

The 'Claim Restrictions' field is highlighted with a blue box, and a blue callout box points to the edit icon, stating: "Pop-up window icon launches the Long Text Field editor window".

The 'Claim Restrictions' pop-up window contains the following text:

Claim Restrictions

In this release, we've enhanced LongText fields to provide a better Admin and user experience:

Vault Admins can now create LongText fields from the Objects > (Object) > Fields > Create Field page. Users can edit LongText fields in a pop-up dialog on the object record details page, which provides them a larger area to edit large content. Users can now export the entire content of LongText fields in an object tab.

Audit Captures Source Record ID in Copy

In past releases, Vault used the same Event Description in the audit trail when users created a new object record or copied an object record. Now, Vault uses separate descriptions for these actions. When users select the Copy Record action, the Event Description in the new record's audit trail includes the source record's name. Learn more about copying object records.

Auto-Number Envelope Record for Multi-Document Workflow

With this feature, Admins can configure a multi-document workflow where Vault automatically generates a name for the Envelope record. The auto-naming can use any string and a token that generates a unique number, for example, Document Review - [#####] would generate names like "Document Review - 000001" and "Document Review - 000002".

When the workflow initiator starts the workflow, the system-generated envelope name will display in the start dialog as a read-only value.

Multi-Document Workflow: Execute Entry Action & Entry Criteria When Canceling Workflows or Removing Documents

When users cancel a multi-document workflow, Vault moves the content documents to the configured Cancel Workflow State. Your organization can configure this to be either the "state in which the workflow started" or a specific state in the document's lifecycle.

With this enhancement, Vault also executes entry actions and entry criteria for the cancel state. This change will help customers who would like to capture information like workflow cancellation date or reset values that were set during the workflow process.

Close



Long Text Field Enhancement

- Considerations
 - Use Long Text Fields when you need to capture 1500 characters or more
 - There is a default limit of 3 Long Text fields per object
- Configuration
 - Admin > Configuration > Objects > {Object} > Fields > Create Field page

Objects > Claim > Fields > Create Field ?

Step 1: Select the field type

Use a LongText field to store anything the user types, up a limit of 32,000 characters.

Example:
Job Number: AB-10293854

Text
Number
Date
DateTime
Yes/No
Picklist
Object
Lookup
Formula
Currency
LongText

Step 2: Choose label and name for the field

Label*

Name* _c

Step 3: Set the options

Status

User must always enter a value (required)

Display in default lists and hovercards

Do not copy this field in Copy Record

Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)

Maximum Length (max 32000)

Help Content



Shared Lookup Fields for Documents

- Overview
 - Lookup document fields can now be used as shared fields in Vault
- Considerations
 - Existing lookup fields can be converted into shared fields
 - Lookup fields on documents must utilize an object relationship (created through an object document field)
 - It cannot use a relationship created through a document reference field on an object
 - The source field for the Lookup field must have an Object or Picklist field type
- Configuration
 - Admin > Configuration > Document Fields > Shared Fields > Create > Select the field type = Lookup

Document Fields >
Create Shared Field ?

Step 1: Select the field type

Date
DateTime
Yes/No
Picklist
URL
Object
Formula
Lookup

Use a lookup field to copy from a source field of an object referenced in an object field.

The value of the lookup field is automatically synchronized with the source field. Lookup fields can only use objects referenced in an object field within its document type hierarchy, and cannot be shared fields.

Step 2: Choose a label for the field*

Therapeutic Area

Step 3: Set the options

Status Active

Display Section* General

Lookup Object Field* Product

Lookup Source Field* Therapeutic Area

Help Content

Separate SAML SSO Configuration for Login & eSignature

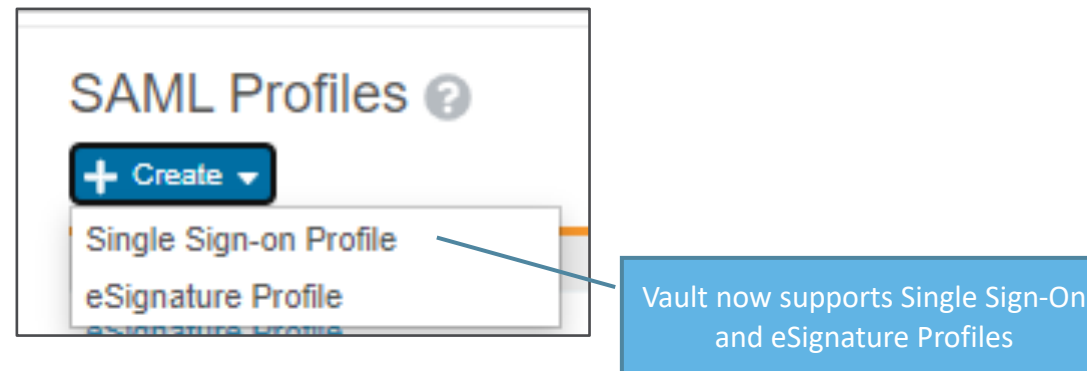


- Overview

- Vault now supports a new type of SAML profile, eSignature Profile, for electronically signing documents and object records via SAML
- SAML profiles have been renamed to Single Sign-on profiles as part of this feature

- Use Case

- Multi-factor authentication can be cumbersome for eSignature; this feature now allows separate flows for Sign-On and eSignature Profiles in scenarios where an organization wishes to require multi-factor authentication for SSO login and only the username & password for eSignatures



Separate SAML SSO Configuration for Login & eSignature



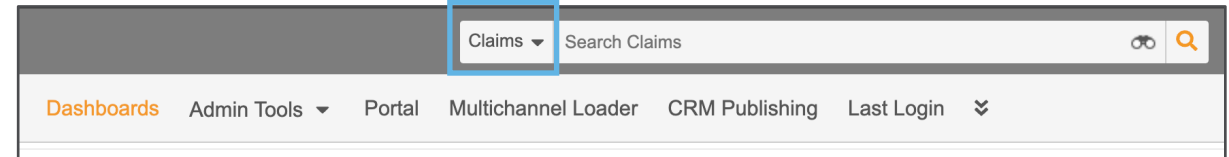
- Considerations
 - Two profile types can be configured
 - Single Sign-on Profile: required for SSO login
 - eSignature Profile: optional, used specifically for signing documents and object records electronically via SAML
 - If no eSignature profile is configured in a Security Policy, the Single Sign-on profile is used for both SSO login and eSignatures
 - One Single Sign-on profile and one eSignature profile can be associated with the same Security Policy
- Configuration
 - Admin > Settings > SAML Profiles > Click Create > Select Sign-On Profile or eSignature Profile > Enter a Label and Name for the profile > Complete the SAML Profile Configuration > Save



Default Search Context

- Overview

- Admins can now define the Advanced Search box filter, on any non-searchable document or object tab, such as Home or Dashboards



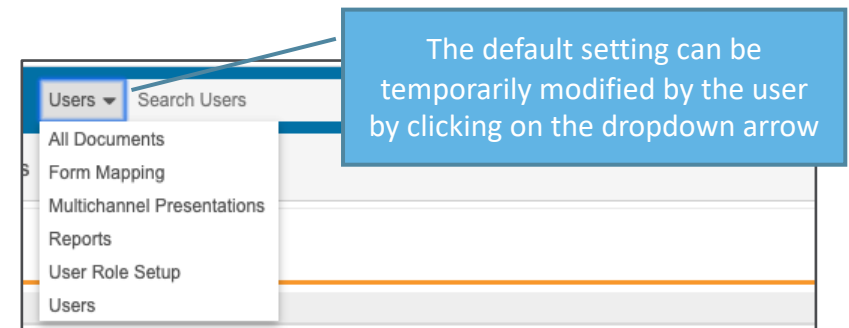
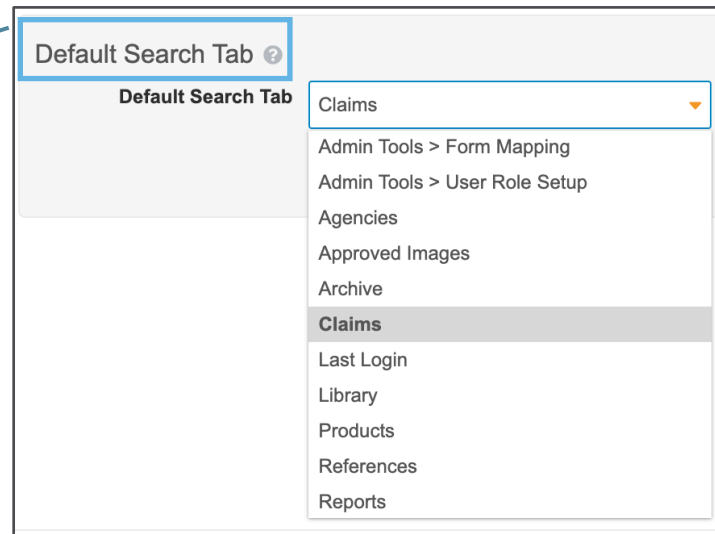
- Considerations

- Users can temporarily modify the default setting by clicking on the filter dropdown

- Configuration

- Admin > Settings > Search Settings > Default Search Tab

Select the tab to be searched by default when a user has navigated to a tab that is not searchable



Document Migration Mode for Vault Loader



- Overview

- Vault Loader now allows Document Migration Mode to be only applied to the Action Type Create and the Object Types below without placing the entire Vault into Migration Mode:

- Document Renditions
- Document Versions
- Documents, Versions, Roles

The screenshot shows the 'Vault Loader: Load' interface. It includes a 'CSV File*' field with a 'Choose' button, an 'Object Type*' dropdown menu, an 'Action Type*' field, and a 'Key Field' dropdown menu. The 'Object Type*' dropdown is open, showing a list of options under the 'DOCUMENTS' category: 'Documents', 'Document Relationships', 'Document Renditions', 'Document Roles', 'Document Versions', and 'Documents, Versions, Roles'. The 'Document Renditions' option is highlighted with a blue border.



Document Migration Mode for Vault Loader



- Considerations

- In Document Migration Mode Vault will not force one to move document versions through their lifecycles and allows the following import functions:
 - Manual version setting
 - Manual adding of renditions
 - Manual assignment of document numbers
 - Editing of archived
- Some Vault functions are limited in Document Migration Mode

- Configuration

- To enable contact Veeva Support
- Users must have the new Document Migration permission
- Document Migration Mode in the Vault Loader UI must be checked or use the *documentmigrationmode* parameter in the Vault Loader Commander Line tool

Vault Owner Actions	Re-render	Power Delete	Vault Loader	Record Migration	Document Migration
Vault Owner Actions	✓	✓	✓	✓	✓

- More Information: [Document Migration Mode for Vault Loader](#)

Vault Loader: Load ?

CSV File*

Object Type*

Action Type*

Key Field

Record Migration Mode

Document Migration Mode

Include updated field values in the output log for verification.
This will impact the performance of the operation.



Inbound Component Dependency Validation



- Overview

- Users can now see details of component dependencies during the Review & Deploy process
- In the case any steps in the Configuration Package are not ordered correctly for deployment, users can now easily reorder them prior to deployment within Vault

Inbound Packages ?

+ Import Search Columns

Name	Summary	Source Vault	Owner	Deployment Status	Last Modified Date
PKG-0017	Migration package- website	3,012	Helena Geist	Blocked	6/17/2020 4:15 PM EDT
PKG-0012			Chris Lozinak	Deployed	1/31/2018 11:17 AM EST
PKG-0010			Chris Lozinak	Deployed	1/31/2018 11:19 AM EST
PKG-0009			Chris Lozinak	Deployed	1/31/2018 11:13 AM EST

MANAGE

- Validate
- Review & Deploy
- Delete

EXPORT

- Package Component Comparison

Comparison and Dependencies

Report website_domain_view__c

Comparison Dependencies

All Status

Component Name	Component Type	Subcomponent Name	Subcomponent Type	Status
document_number__v	Docfield			In Target
created_by__v	Docfield			In Target
website_domain__c	Docfield			In Package - Wrong Order
base_document__v	Doctype			In Target
name__v	Docfield			In Target

Click on reorder to change order of components

Click on the Deployment Action and Dependencies tab to view dependency information

If component is in the wrong order, use Reorder to button to adjust the package

User can view Deployment Status & error details or warnings

Inbound Packages > PKG-0015 >

Review and Select Steps (Step 1)

Reorder

Step	Step Type	Label	Name	Type	Deployment Status	Deployment Action
00010	Component	Campaign Type	test_picklist__c	Picklist	Verified	Add (missing in Vault)
00020	Component	Campaign	campaign__c	Object	Verified	Add (missing in Vault)
00030	Component	Campaign Meeting	promotional_campaign_meeting__c	Object	Verified	Add (missing in Vault)
00040	Component	Object Campaign	object_campaign__c	Object	Verified	Add (missing in Vault)
00050	Component	Object Campaign Meeting	object_campaign_meeting__c	Object	Blocked	Add (missing in Vault)

There are required missing references.





Atomic Security for Documents: Active Workflow Actions

- Overview

- “Active Workflow Actions” can be granted based on Document Lifecycle State and Lifecycle Role, allowing for greater control over who can Cancel Workflow, Add Participant, Reassign Task, Cancel Task, and Remove Content in a Multi-Document Workflow

- Use Case

- Users in the Editor Role should be able to Cancel Task but only in certain lifecycle states

- Considerations

- Once enabled by Support: Admin > Config > Document Lifecycle > [Lifecycle] > [State] > Atomic Security > Edit
- Once turned on, it cannot be turned off

The screenshot shows the 'Atomic Security: Active Workflow Actions' configuration page. The breadcrumb trail is 'Document Lifecycles > General > States > Draft'. The page title is 'Atomic Security: Active Workflow Actions'. There are tabs for 'Details', 'User Actions', 'Security Settings', 'Entry Criteria', 'Entry Actions', and 'Atomic Security'. A '+ Role Override' button is visible. The main table has columns for 'Action Label', 'State Behavior', and various roles: 'Approver', 'Consumer', 'Coordinator', 'Reviewer', 'Viewer', 'Owner', and 'Editor'. Each cell contains a dropdown menu with 'Execute' or 'Hide' options.

Action Label ^	State Behavior	Approver x	Consumer x	Coordinator x	Reviewer x	Viewer x	Owner x	Editor x
Cancel Task	Execute v	Hide v	Hide v	Execute v	Hide v	Hide v	Execute v	Hide v
Cancel Workflow	Execute v	Hide v	Hide v	Execute v	Hide v	Hide v	Execute v	Hide v
Reassign	Execute v	Hide v	Hide v	Execute v	Execute v	Hide v	Execute v	Hide v
Remove Content	Execute v	Hide v	Hide v	Execute v	Hide v	Hide v	Execute v	Hide v
Update Participants	Execute v	Hide v	Hide v	Execute v	Execute v	Hide v	Execute v	Hide v





Atomic Security for Documents: Lifecycle User Actions

- Overview

- Atomic Security for Document Lifecycle User Actions provides more granular control over who can perform specific Lifecycle User Actions like changing document state and starting a workflow

Previously Document Lifecycle User Actions permissions were all or nothing

Now the Hide, View, or Execute security can be defined for each individual Document Lifecycle User Action

- The new Multi-Channel Actions permission is introduced upon enabling Atomic Security for Document Lifecycle User Actions

Multi-Channel Actions such as Send to CLM and Create Presentation have a new control permission



Atomic Security for Documents: Lifecycle User Actions



- Considerations

- Upon enablement Vault performs the following migration actions:

- For all configured user actions (previously controlled by Start Workflow and Change State permissions), Vault will set the State Behavior to Execute
 - Vault will apply overrides to hide these actions for any role that did not include the controlling permission before enablement
 - Vault will grant access to the new Multi-channel Actions permission for any roles which included Start Workflow permission

- Configuration

- Once enabled by Support: Admin > Config > Document Lifecycle > [Lifecycle] > [State] > Atomic Security > Edit

- In 20R3 the feature is planned to be enabled across all Vaults

Action Label ▲	State Behavior	Agency X	Approver X	Consumer X	Content Creator X	Coordinator X
Cancel Material	Execute ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼
Change State to Rea...	Execute ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼
Expire material	Execute ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼
References Review (...)	Execute ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼	Hide ▼





Objects



Audit Captures Source Record ID in Copy

- Overview

- Vault Object Framework (VOF) audit trail is enhanced to capture the Copy Record event as a separate event description
- The source ID of the record from which the record is copied is now captured in the log

Claim: CL-000023 ★ DRAFT

Pending Review | In Process | Approved for Use | No Longer Approved

Details

- Match Text Variations (0)
- References (3)
- Core Supporting Documents
- Where Used
- Claim Documents (0)

Details

Name CL-000023

Match Text Now approved for the treatment of hypercholesterolaemia in teenagers and young adults with familial hypercholesterolaemia

Audit trail for Claim : Claim: CL-000023

Include related objects

Timestamp is in the last Day

+ Add filter

Showing events for 5/20/2020 to 5/21/2020 (2 results)

Timestamp (M/d/yyyy)	User Name	Event Description	Record
5/20/2020 12:14 PM EDT	csm@usc8.com	Claim : CL-000023 copied hierarchy from Claim : CL-000001 (V1Y000000000101)	Claim : CL-000023
5/20/2020 12:14 PM EDT	csm@usc8.com	Claim : CL-000023 copied from CL-000001	Claim : CL-000023

Access the Copy Record event from the newly created record's Audit Trail

The Event Description in the new record's audit trail includes the source record's name



Sharing Settings UI Enhancements for Objects



- Overview

- The Object Sharing Settings UI has been redesigned to improve the user experience
- There is now one sortable table for role assignment types (manual, custom, and match sharing rules)
- Search by user or group and results return both directly assigned roles and implicit group membership assignments

The screenshot displays the 'Sharing Settings' interface. On the left is a navigation menu with categories like 'Workflow Timeline', 'Details', 'Quality Event Signatures (0)', 'Batches (0)', 'Assets (0)', 'Material (0)', 'Extension Request (0)', 'Additional Details', 'Attachments (1)', 'Referenced QEs (0)', and 'Contexts (0)'. The main area shows a table of role assignments with columns for Name, Role, Sharing Rules, and Access. A search dropdown is open, showing results for 'Orville Mills'. A blue box highlights the 'Access' column, and another blue box explains that search results include both direct user role assignments and those from user groups.

Name	Role	Sharing Rules	Access
All Controlled Forms-QA	Editor	Display Rule	Custom Sharing Rules
All Internal Users	Editor	Display Rule	Custom Sharing Rules
QA Manager	Editor	Display Rule	Custom Sharing Rules
Pleasanton-Manufacturing ...	Manufacturing Facility Lead	Display Rule	Matching Sharing Rules
JC Meriaux	Owner		Manual Assignment
All Controlled Documents-QA	Quality Analyst	Display Rule	Custom Sharing Rules
Jane A. Austin	Quality Analyst		Manual Assignment
Pleasanton-Quality Analyst-...	Quality Analyst	Display Rule	Matching Sharing Rules

Search results will return direct user role assignments and role assignments done through user groups

The Access column indicates how the role is assigned (custom, manual, or matching)

- Use Case

- This enhancement allows organizations to have a truer picture of all of the role assignments a particular individual has on a record





Record Related List Enhancements

- Overview

- You can now perform the following actions on Object record related lists:

- Copy Record Action - allows users to copy a related object record directly from the Actions menu within related record sections on an object record details page
- Change Type Action - allows users to change the object type of related object records using the Actions menu within related record sections on an object record details page
 - This action only applies to objects with Types configured

The screenshot displays the Veeva CRM interface for a claim record (CL-000007) in an 'APPROVED' state. A progress bar at the top shows the workflow stages: Pending Review, In Process, and Approved for Use. The main content area is divided into a left sidebar with navigation options (Details, Match Text Variations, References, etc.) and a central details pane. The details pane shows fields for Name, Match Text, Product, Country, Lifecycle, Claim Risk, Created By, Created Date, Last Modified By, Last Modified Date, and Status. A 'Match Text Variations' list is visible at the bottom, with a context menu open over the first entry, highlighting the 'Copy Record' action.

Name	Lifecycle State	Created By	Created Date
MTV-000002	Approved	CSM User	1/7/2020 12:38 F





Resources

Resources

- Contact your Customer Success Manger
- Email: VaultCustomerSuccess@veeva.com
- Vault Resource Library: <https://support.veeva.com/hc/en-us/articles/360013243773-Veeva-Vault-Educational-Resource-Library>
- Vault Help: <http://vaulthelp2.vod309.com/wordpress/>
- Vault Standard Metrics Resource Center: <https://www.veeva.com/vault-promomats-standard-metrics/>





Thank you



Appendix



Constrain Object Reference Search

- Overview

- For object reference fields, values returned in the filter search box will now be constrained to those that are relevant to the current set of documents or object records

- Considerations

- In Vault, a search box appears on filters when there are more than 15 available values
- Previously, all of the object's reference field values would appear in the search box, even if a value was not included in any of the standing search results

FILTERS

▼ COUNTRY

Search Country

<input type="checkbox"/>	Australia	1
<input type="checkbox"/>	Austria	1
<input type="checkbox"/>	Belgium	1
<input type="checkbox"/>	Canada	1
<input type="checkbox"/>	Denmark	1
<input type="checkbox"/>	Finland	1
<input type="checkbox"/>	France	1
<input type="checkbox"/>	Germany	1
<input type="checkbox"/>	Global	1
<input type="checkbox"/>	Ireland	1
<input type="checkbox"/>	Italy	1
<input type="checkbox"/>	Japan	1
<input type="checkbox"/>	Netherlands	1
<input type="checkbox"/>	Sweden	1

▼ COUNTRY

Norway

Norway

Advanced

Before: Norway does not appear as value for Object Reference Field, but when searched, appears with checkbox

FILTERS

▼ COUNTRY

Search Country

<input type="checkbox"/>	Australia	1
<input type="checkbox"/>	Austria	1
<input type="checkbox"/>	Belgium	1
<input type="checkbox"/>	Canada	1
<input type="checkbox"/>	Denmark	1
<input type="checkbox"/>	Finland	1
<input type="checkbox"/>	France	1
<input type="checkbox"/>	Germany	1
<input type="checkbox"/>	Global	1
<input type="checkbox"/>	Ireland	1
<input type="checkbox"/>	Italy	1
<input type="checkbox"/>	Japan	1
<input type="checkbox"/>	Netherlands	1
<input type="checkbox"/>	Sweden	1

▼ COUNTRY

Norway

Advanced

After: When Norway is entered into search box, no result is given



State Change Job Improvements

- Overview

- State change jobs on documents have been enhanced to handle cases where there is an active workflow on the latest version of a document, and a prior Steady State document needs to change states
- For example, if a job is run to expire Document Version 1.0 in the Approved for Distribution state, this document can change states to Expired while the newer draft (Version 1.1) is in the In Review state

- Considerations:

- Previously, if a job had been run to expire documents in a Steady state but that document had been versioned up, the steady state document would not have changed to the Expired state

Version History [See more details](#)

	Created On	Status	
1.1	7/2/2020	In Coordinator Review	
1.0	5/13/2020	Approved for Distribution	

Previously, the Steady State version would stay in Approved for Distribution even if expiration date had passed once a new version and workflow started

Version History

	Created On	Status	
1.1	7/1/2020	In Coordinator Review	
1.0	7/1/2020	Expired	

Now, Steady State version will expire even if a new version has entered a workflow

Change to Maximum Length for Link Field



- Overview

- This Link system field (link__sys) maximum character length has been reduced to 255 characters from 1,500 characters

Field Label	Field Name	Source	Data Type
Abbreviation	abbreviation__sys	System ▼	Picklist
Created By	created_by__v	Standard ▼	Object (User)
Created Date	created_date__v	Standard ▼	DateTime
Global ID	global_id__sys	System ▼	Text (200)
ID	id	Standard ▼	ID
Last Modified By	modified_by__v	Standard ▼	Object
Last Modified Date	modified_date__v	Standard ▼	DateTime
Link	link__sys	System ▼	Text (255)
Name	name__v	Standard ▼	Text (128)
Rate	rate__sys	System ▼	Number (0 - 1,000,000,000)
Status	status__v	Standard ▼	Picklist

The maximum length for the Link system field is now 255 characters



Default Profile Image for System User



- Overview

- System owned users such as System and Application owner now appear with the Veeva “V” logo as a user image throughout Vault
- This image will also appear in notification summary emails when a notification is sent from a System-owned user



Veeva “V” logo appears as user image in Vault

Commercial Data Model Changes



- Overview

- Vault Standard Metrics was deployed to all Vaults in 20R1
- Three fields will become mandatory in 20R2
 - Global Content Type
 - Content Creation Currency
 - Content Creation Cost

- Considerations

- It is possible to default:
 - Global Content Type
 - Content Creation Currency

- For more information on the configuration of Vault Standard Metrics see here:
 - [Configuring PromoMats Standard Metrics](#)

Commercial Data Model Changes



- Overview
 - To improve the syndication of content to Multichannel CRM users, there is a new option to identify multichannel content for this market – this will be leveraged in a future CRM release
 - New shared document field *Use China CDN* (use_china_cdn__v)
 - New object field *Use China CDN* (use_china_cdn__v) on the *Distribution* (distribution__v) object
- Considerations
 - An administrator needs to activate this field if this feature is going to be used
 - This Vault configuration will be used by a future CRM release

Commercial Data Model Changes



- Overview

- The following fields have been added to documents:

- *Annotations (Claim Links)* (annotations_claim__v) - count of links created by manually linking to a Claim record
 - *Annotations (Auto Links)* (annotations_auto__v) - count of links created by Suggest Links when Auto Links feature is enabled and no wildcard is used

MedComms Data Model Changes



- Overview

- A new object has been added: Case Intake (case_intake__v)
 - This supports the Unified Case Intake Form, speeding up case creation
- If the Enable Case Intake Form admin feature flag is ticked, the following Page Link is added:
 - Case to Case Intake Form redirect (case_to_case_intake_redirect__v)
- A new picklist has been added: Case Response Type (case_response_type__v)
 - This is used in the Case Intake Form to determine the Case Response Type to create





Improvements for Long Running Jobs

- Overview

- Scheduled, in-progress and completed job instances can be monitored in Vault via the Job Status page
- Vault now clears out jobs that are stuck and do not make progress for three days
- Prior to this release, job instances would remain stalled in a Running state for 14 days before getting cleared out

JOBS
Job Definitions
Job Status

Job Status

Scheduled

Instance ID	Job Title	Scheduled Start Time	Job Status
58050	Synchronize Portal Assets	7/6/2020 1:00 AM EDT	Scheduled
57966	User Account Activation	7/6/2020 3:00 AM EDT	Scheduled
57969	Task Reminder Notification	7/6/2020 5:00 AM EDT	Scheduled

Running

Instance ID	Job Title	Started Time	Job Status
No items found			

History

Instance ID	Job Title	Completion Time	Job Status	Log Expiration Date
58030	Task Reminder Notification	7/5/2020 5:03 AM EDT	Success	
58026	User Account Activation	7/5/2020 3:04 AM EDT	Success	
58004	Task Reminder Notification	7/4/2020 5:05 AM EDT	Success	
57993	Vault Loader	7/5/2020 8:55 PM EDT	Success	7/21/2020 8:55 PM EDT
57989	Vault Loader	7/5/2020 7:47 PM EDT	Success	7/21/2020 7:47 PM EDT

China CDN Replication Support



- Overview
 - Admins can configure which CRM Engage and CLM content for Chinese customers will be replicated to a China-hosted CDN, improving load times and overall performance
- Considerations
 - This Vault configuration will be used by a future CRM release
 - This feature introduces:
 - New shared document field Use China CDN (use_china_cdn__v)
 - New object field Use China CDN (use_china_cdn__v) on the Distribution (distribution__v) object



CJK Optimized Record Search

- A 'CJK Optimized' setting is now offered for Vaults with Chinese, Japanese, or Korean text in object record fields
- When this setting is enabled by Support, Vault will split all CJK phrases into words on object record text fields when users search so that field values are easier to find



Localize Vault: Hungarian & Dutch



- Localize Vault to Hungarian

- Overview:

- The Veeva Vault UI now supports Hungarian
 - Vault also supports setting Hungarian translations for labels in user-configurable data such as document types, fields, picklist values, and lifecycle names; learn more about [supported languages](#) and [localization settings](#)

- Where to Find:

- Click User Name > User Profile > Edit > Settings > Language

- Enablement Change: Localize Vault to Dutch

- Overview:

- Previously, the Veeva Vault UI supported Dutch for customers that requested it through Veeva Support; in 20R2 Dutch is available automatically
 - Vault also supports setting Dutch translations for labels in user-configurable data such as document types, fields, picklist values, and lifecycle names; learn more about [supported languages](#) and [localization settings](#)

- Where to find:

- Click User Name > User Profile > Edit > Settings > Language





Vault Digital Publishing Security Update

- Overview

- When initially configuring or updating an existing Vault Digital Publishing configuration, a verification file (JSON Web Token, .jwt) will now need to be downloaded and placed in the root of each of the specified S3 buckets to ensure appropriate S3 access and to validate the configuration

- Considerations

- Vaults that already have VDP configured do not need to make any changes unless the CloudFront or S3 configuration needs to be updated
- The verification file is valid for 30 minutes
 - If not validated in that timeframe, a new verification file will need to be downloaded

Note: 'CDN Settings' has been updated to 'Digital Publishing Settings'

Digital Publishing Settings ?

You must download the following file and place in the root of each of the S3 buckets specified below in order to save changes to configuration. This is valid for 30 minutes.

[Download Verification File](#)

- Admins will receive an error message if the verification file has not been placed in the S3 bucket

- Where to find

- Admin > Settings > Digital Publishing Settings

Production Bucket

S3 Endpoint*
s3.us-east-1.amazonaws.com

S3 Bucket Name*
csm-production

CDN Domain*
d3m04c9tjv8jd.cloudfront.net

CloudFront Origin Access Identity Canonical ID*
44b96fe829c8b8de3f5a86bde0680bba8844eac49221184f

Verification file not found in bucket [Validate](#)



Rename Permission for Mobile Applications



- Overview
 - The Enable App Store Configuration permission has been relabeled to Enable Direct Installation in order to better reflect the behavior of this permission for Vault mobile applications
- Considerations
 - This permission grants the ability to use the public version of mobile apps from the App Store
 - Without this permission, Vault users must use the mobile application version provisioned by their organization
- Where to Find
 - Admin > Users & Groups > Permission Sets > [Permission Set] > Application Tab > Client Applications

Client Applications	Enable	Enable Direct Installation
Veeva Snap	✓	✓

As an example for Veeva Snap, this now grants the ability to use the public version available from the App Store



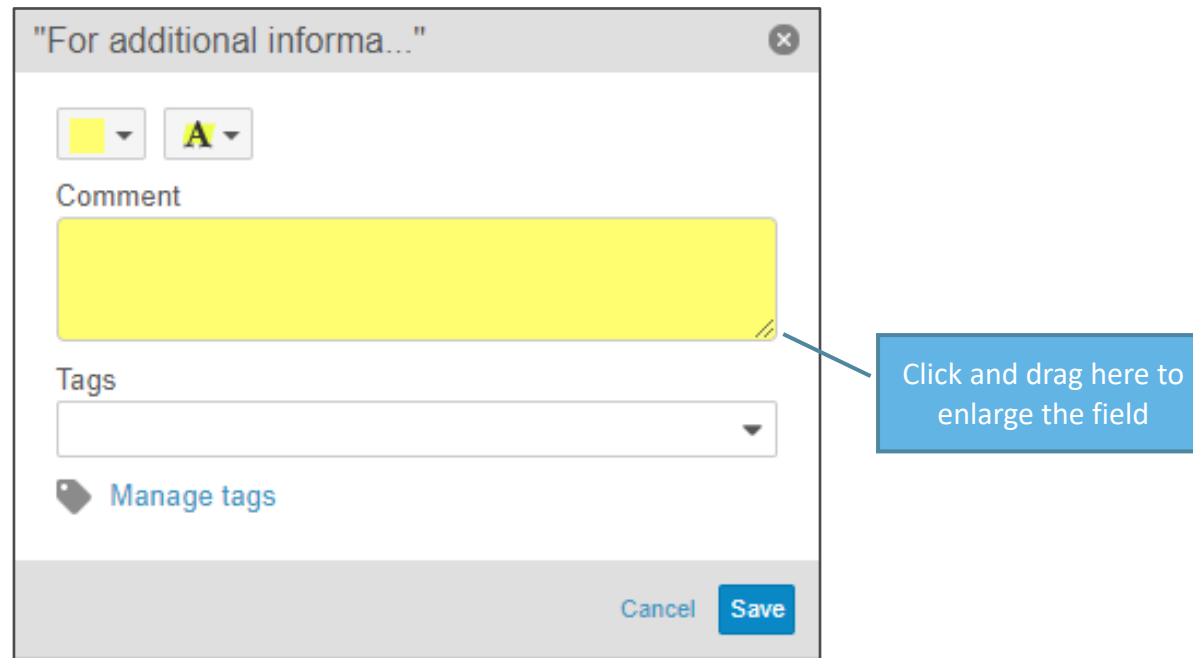
Restore Resizing to Annotation Comments Field

- Overview

- The ability to manually resize the Comment Field in Create Annotation and Edit Annotation dialog has been restored

- Considerations

- The Comment Field can be resized vertically but cannot be made wider
- When resized, the entire dialog will increase to accommodate the new field size

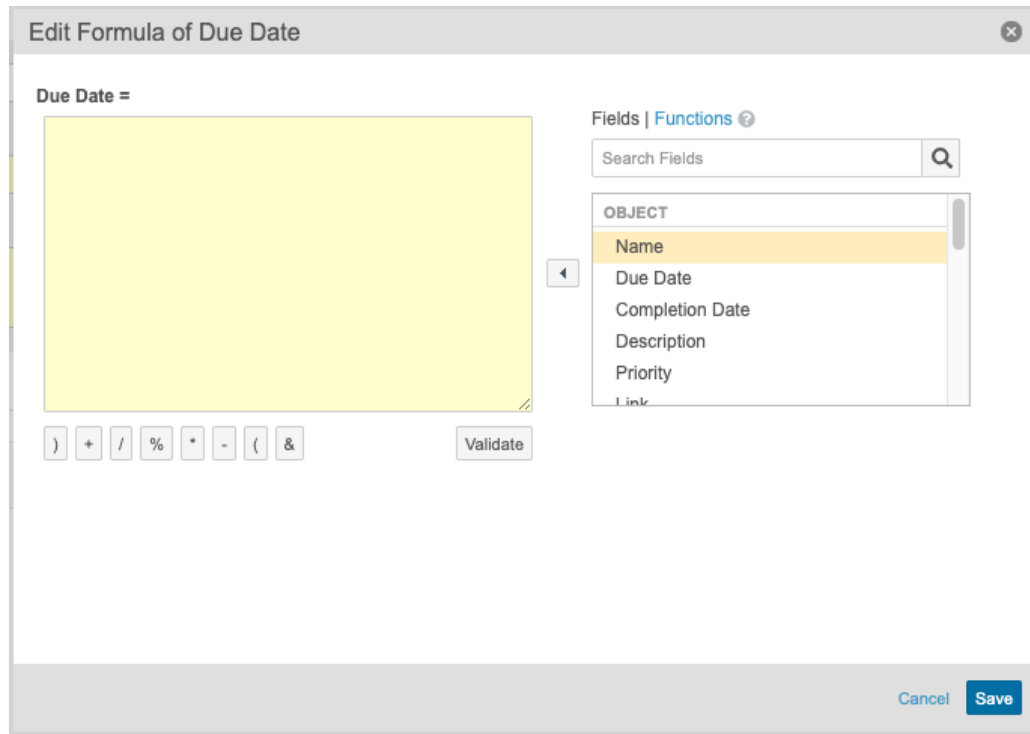


Updates to Object Workflow & Lifecycle Formula UI

- Overview

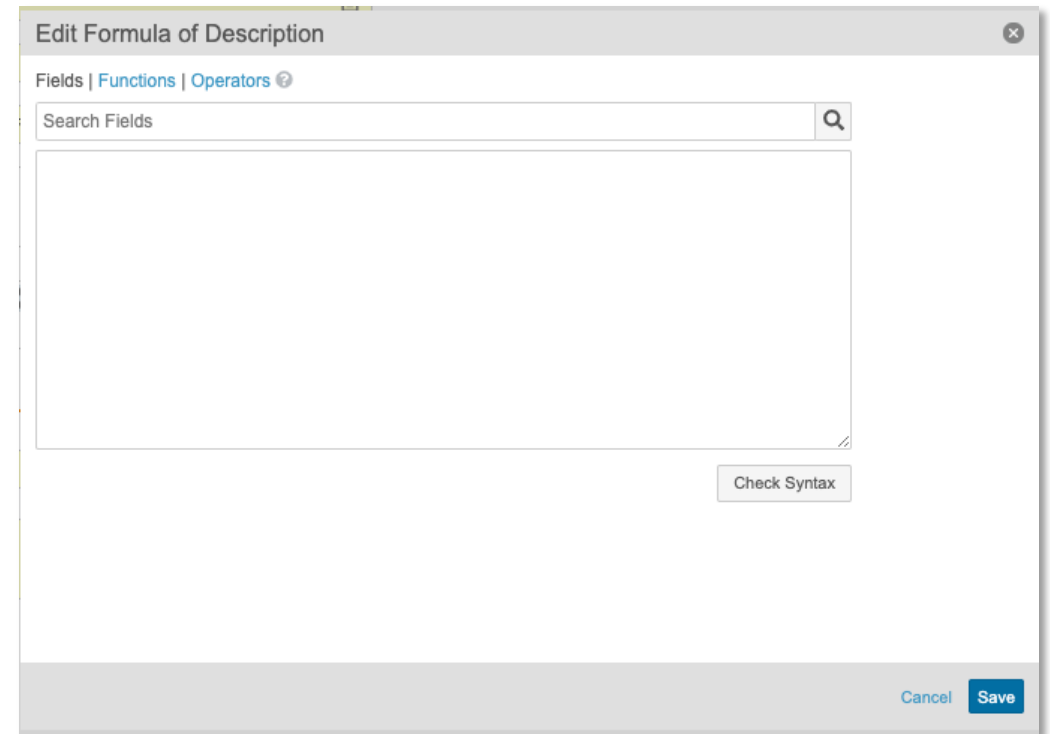
- This feature updates the formula editor for Object Lifecycle and Workflows, it is now consistent with the editor available when configuring objects

Previous



The screenshot shows a window titled "Edit Formula of Due Date". On the left, there is a large yellow text area labeled "Due Date =" with a small arrow icon to its right. Below this area is a row of mathematical operators: `)`, `+`, `/`, `%`, `*`, `-`, `(`, and `&`. To the right of the operators is a "Validate" button. On the right side of the window, there is a "Fields | Functions ?" section with a "Search Fields" input field and a search icon. Below this is a list of fields under the heading "OBJECT": "Name", "Due Date", "Completion Date", "Description", "Priority", and "Link". The "Name" field is highlighted. At the bottom right of the window are "Cancel" and "Save" buttons.

New



The screenshot shows a window titled "Edit Formula of Description". At the top, there are tabs for "Fields", "Functions", and "Operators". Below the tabs is a "Search Fields" input field with a search icon. The main area of the window is a large empty text box. At the bottom right of the text box is a "Check Syntax" button. At the bottom right of the window are "Cancel" and "Save" buttons.

VPK Deployment Order Dependency & Validation



- Overview

- The following enhancements allow Admins to validate all supported dependencies prior to deploying VPK packages
 - A validation process will automatically run that will determine if the Inbound Package has any dependencies (e.g., a picklist-type document field Audience the picklist it uses) that are blocking the deployment
 - A validation log that contains component dependency information, including whether they are required and whether they exist in the package or in the target Vault, will be available for download
 - A new gear option will be available to allow the user to rerun the validation process
- VPK export has been enhanced to determine the correct deployment order for supported component types

The screenshot displays the Veeva VPK interface for managing inbound packages. On the left, the 'Inbound Package: PKG-0002-2' is shown as 'ACTIVE'. A 'MANAGE' dropdown menu is open, highlighting the 'Validate' option. The package details include Name: PKG-0002-2, Source Vault: 34,820, Summary: Migration mode, and Author: maria.ruoto@csmd.com. On the right, the 'Inbound Package: PKG-0001-2' is shown as 'ACTIVE'. Its details include Name: PKG-0001-2, Source Vault: 21,349, Summary: Case, Author: maria.ruoto@csmd.com, Owner: Maria Ruoto, Package Type: Migration, Application, and Description. The 'Deployment Status' is 'Blocked'. The 'Created Date' and 'Last Modified Date' are both 5/19/2020 4:21 PM EDT. Below the details, there are sections for 'Steps' and 'Logs'. A log entry for 'PKG-0001-2-Validation.log' is shown, with a download icon and a gear icon. The log entry details are: 05/19/2020 16:21, Requested by: Maria Ruoto, SUCCESS - PackageStatus(Blocked), Total(8), TotalComponentStepsBlocked(4).





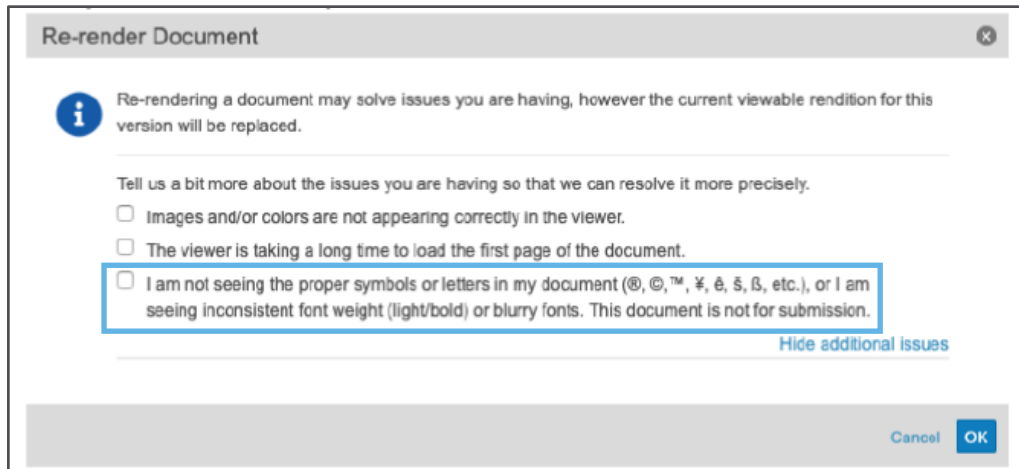
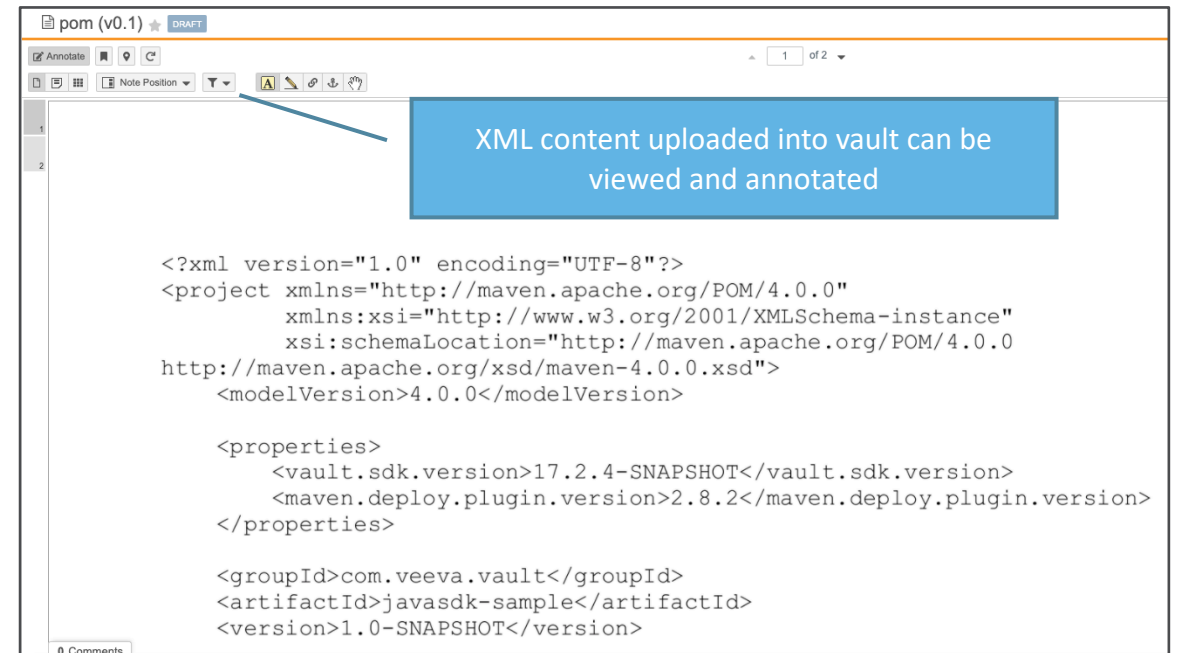
XML Rendering

- Overview

- This new feature provides the ability to generate a viewable rendition for XML files which can be reviewed and annotated within Vault

- Considerations

- XML content can be uploaded through the UI or API
- XML content can be re-rendered choosing specific options for XML content





Re-establish Vault to Vault Connection

- Overview

- This feature allows connections to be more easily broken and re-established when a source or target Vault is created, cloned or refreshed in non-production Vaults
- All Active Vault to Vault connections are set to Pending during a sandbox creation or refresh, the corresponding connection in the remote Vault remains in an Active state
- To re-establish a Vault to Vault connection, re-download the connection file in the source Vault, re-upload the connection file in the target vault and approve the connection

Vault to Vault: Test Connection ★ **PENDING**

▼ **Details**

Name Test Connection	Connection Type Vault to Vault
API Name test_connection	Lifecycle Connection Lifecycle
Remote Vault ID	Lifecycle State Pending
Description	Certificate ID 00001
Authorized Connection Rosa Suarez	
User	

Re-establish Vault to Vault Connection



- Use Case
 - When you have two sandbox Vaults (source and target) and you refresh the target Vault, the connection will break, you can re-establish the connection from the source Vault to the new target Vault
- Additional Information
 - For detailed information on how to re-establish connection between two Vaults, please go to this link: <http://vaulthelp.vod309.com/wordpress/admin-user-help/managing-connections/>

Display Page X of Y and Datetime in PDF



- Overview

- This feature creates consistency within PDF report export and improves audit exports to PDF by:
 - Including the total page count, audit, and Vault name on each page
 - Providing the date_time on each page

DemoCSMAS - Document Audit History

5/15/2020 11:38 AM EDT

Showing events for: 5/14/2020 to 5/15/2020

Event Filter: ""

User Filter: ""

Object or Document Filter: "REF-0076"

DemoCSMAS - Document Audit History - 5/15/2020 11:38 AM EDT Page 1 of 2



Unified Navigation Behavior when Clicking Object References in Document Fields



- Overview

- Rather than taking the user to a custom tab, the business admin page, or to a standalone object details page, depending on the user's access, Vault will now always take the user to a standalone object detail page for the object record, even if the user has access to a custom tab or the Business Admin page
- This feature makes the Vault's response to a user clicking on an object record in a document field more consistent



Domain Users: Add Vaults in CSV Export

- Overview

- When a Domain Admin filters on All Users or Current Domain on the Domain Users page and exports the list of users to CSV, the exported file now includes a list of Vaults to which each user is assigned

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

USERS & GROUPS

Vault Users

Domain Users

Active Delegations

Groups

Security Profiles

Permission Sets

Application Roles

Domain Users ?

Current Domain | All Users | Search Name

Name	User Name	Domain Status	Last Login
<input type="checkbox"/> 1, MSL	MSL1@csmdam.com		
<input type="checkbox"/> Agency, External	externaluser1@csmdam.com		
<input type="checkbox"/> Begum, Saleha	saleha.begum@csmdam.com		
<input type="checkbox"/> Black, Jack	jack.black@csmdam.com		
<input type="checkbox"/> Block, Jennifer	jennifer.block@csmdam.com		
<input type="checkbox"/> brown, tom	tom.brown@csmdam.com		
<input type="checkbox"/> Cholecap_Reviewer, Amity	amity@csmdam.com		
<input type="checkbox"/> Collins, Lynzee	lynzee.collins@csmdam.com		
<input type="checkbox"/> Commenter, Cody	CodyCommenter@csmdam.com		
<input type="checkbox"/> DePalma, Nathan	nathan.depalma@csmdam.com		
<input type="checkbox"/> DiNitto, Cindy	cindy.dinitto@csmdam.com		
<input type="checkbox"/> Fairchild, Mark	mark.fairchild@csmdam.com		
<input type="checkbox"/> Garcia (US Reviewer/Approver), Penelope	PenelopeGarcia@csmdam.com		
<input type="checkbox"/> Lindley, Melissa	melissa.lindley@csmdam.com		
<input type="checkbox"/> Vidal, David	david.vidal@csmdam.com		

users_as_of_2020_07_06_EDT

Home | Insert | Draw | Page Layout | Formulas | **Data** | Review | View | Acrobat | Tell me

From HTML | From Text | New Database Query | Refresh All | Edit Links | Connections | Properties | Stocks | Geography | Sort | Filter | Clear | Reapply | Text to Columns | Flash Fill | Remove Duplicates | Data Validation

Possible Data Loss: Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

	A	B	C	D	
1	Agency, External	externaluser1@csmdam.com	Active	6/26/2020 7:06:55 PM EDT	CC CSM DAM Demo Vault
2	Begum, Saleha	saleha.begum@csmdam.com	Inactive		CC CSM DAM Demo Vault
3	Cholecap_Reviewer, Amity	amity@csmdam.com	Active	4/19/2019 11:58:55 AM PDT	CC CSM DAM Demo Vault
4	DePalma, Nathan	nathan.depalma@csmdam.com	Active	10/17/2019 5:58:57 AM PDT	CC CSM DAM Demo Vault
5	Klimkowski, Robert	robert.klimkowski@csmdam.com	Active		CC CSM DAM Demo Vault
6	Liggett, Kevin	kevin.liggett@csmdam.com	Active	10/30/2019 11:58:13 AM PDT	CC CSM DAM Demo Vault
7	mcgough, jim	jim.mcgough@csmdam.com	Active	1/30/2020 11:46:19 AM PST	CC CSM DAM Demo Vault
8	Owner, Maria	maria.owner@csmdam.com	Active	3/20/2020 4:21:51 PM EDT	CC CSM DAM Demo Vault
9	Portal_Only, Quint	quint@csmdam.com	Active	4/19/2019 7:35:19 PM PDT	CC CSM DAM Demo Vault
10	Reviewer, Cholecap	Cholecap@csmdam.com	Active	6/4/2020 6:51:45 AM PDT	CC CSM DAM Demo Vault
11	Roberts, Jake	Jake.Roberts@csmdam.com	Active	6/26/2020 3:59:08 PM PDT	CC CSM DAM Demo Vault
12	Ruoto, William	william@csmdam.com	Active		CC CSM DAM Demo Vault
13	Tiger, Tony	pending@csmdam.com	Active		CC CSM DAM Demo Vault
14	User, Pending	pending.user@csmdam.com	Active		CC CSM DAM Demo Vault
15	Vicknair, Tyler	tyler.vicknair@csmdam.com	Active	3/9/2020 10:59:38 PM EDT	CC CSM DAM Demo Vault
16	DiNitto, Cindy	cindy.dinitto@csmdam.com	Active	3/13/2020 8:15:27 AM EDT	CC CSM DAM Demo Vault, MR Demo - General Release
17	Geist, Helena	helena.geist@csmdam.com	Active	7/6/2020 4:46:22 PM EDT	CC CSM DAM Demo Vault, MR Demo - General Release
18	Collins, Lynzee	lynzee.collins@csmdam.com	Active	5/29/2020 12:44:37 PM EDT	MedCommsDemo
19	Fairchild, Mark	mark.fairchild@csmdam.com	Active		MedCommsDemo
20	Lindley, Melissa	melissa.lindley@csmdam.com	Active	10/15/2018 11:58:06 AM PDT	MedCommsDemo
21	Vidal, David	david.vidal@csmdam.com	Active	1/30/2020 4:10:10 AM PST	MedCommsDemo

