# Veeva Commercial Vault MedComms 20R2 Deep Dive

July 2020

Veeva

Geoff Peters

Senior Customer Success Manager

Loyd Vidal

Manager, Commercial Content
Customer Success EU

Veeva

# Self Serve Recording Navigation


- 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<br>**July 13**: System Release Memo<br>**July 14**: Compliance Documents<br>**July 17**: Executed OQs |
| **July 16** | Veeva Commercial Vault 20R2 Developer Release Deep Dive<br>https://veeva.zoom.us/webinar/register/WN_1vHoZYNrRqytWiSxODJMzA |
| **July 20** | 20R2 Release Kit<br>Includes 20R2 Brainshark Recording |
| **July 28** | 20R2 MedComms Q&A Session<br>https://veeva.zoom.us/webinar/register/WN_gXrj1EZATCWyGnZT97w6cg |
| **July 29** | 20R2 EU PromoMats Q&A Session<br>https://veeva.zoom.us/webinar/register/WN_ebl_MtAMS3KIBjr3Vxmycw |
| **July 30** | 20R2 NA PromoMats Q&A Session<br>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<br>*Vault File Manager does not release at this time, and instead releases with the general release PODs* |
| **August 7** | Release to applicable general release PODs |

# Announcements

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# CRM: UI WebView Support

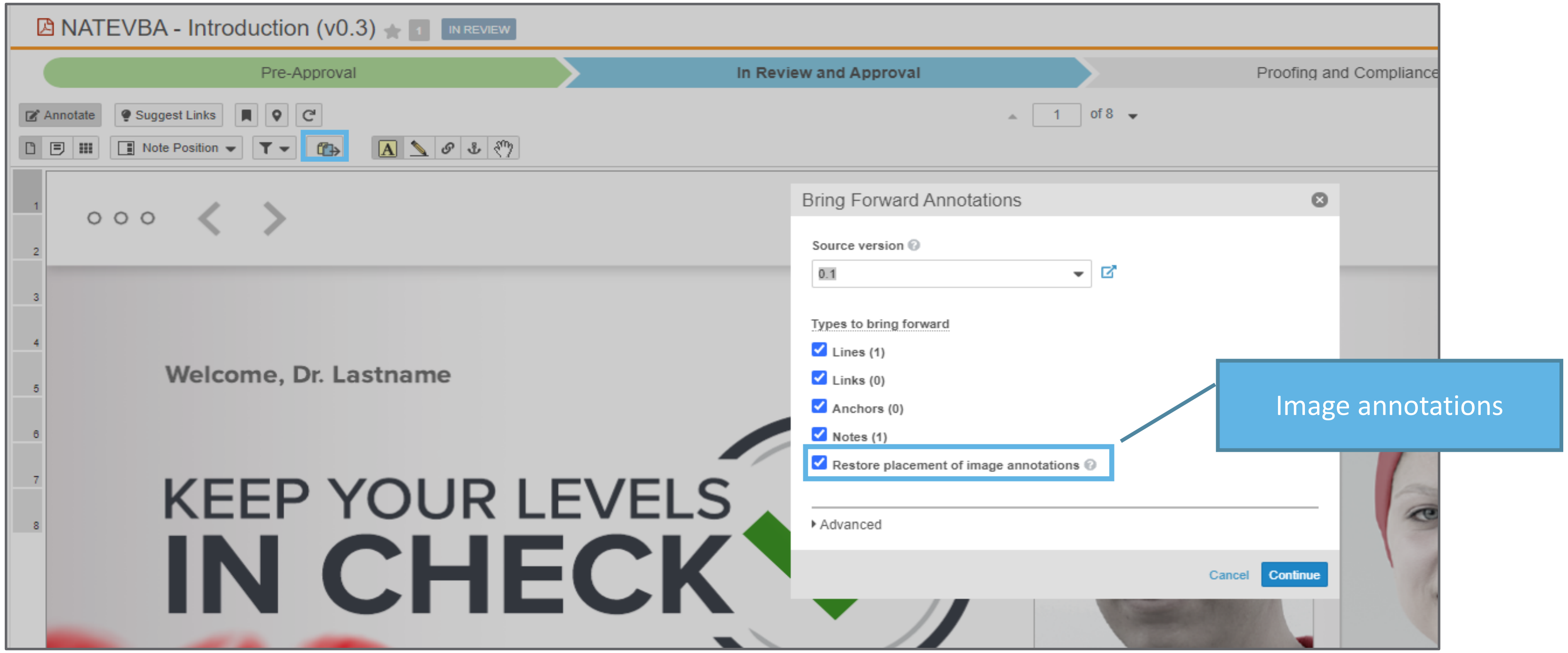
# CRM: UI WebView Support Ending in 20R2

- 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



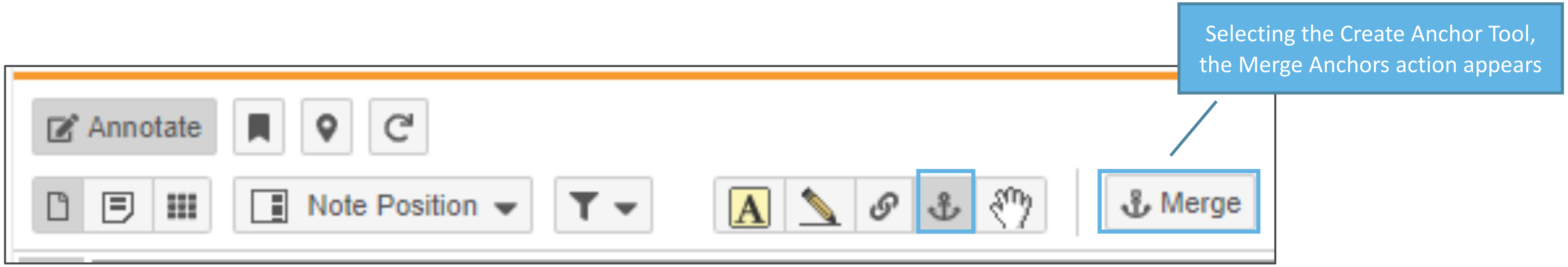
# Indicate When Annotations Hidden by Filters

- 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

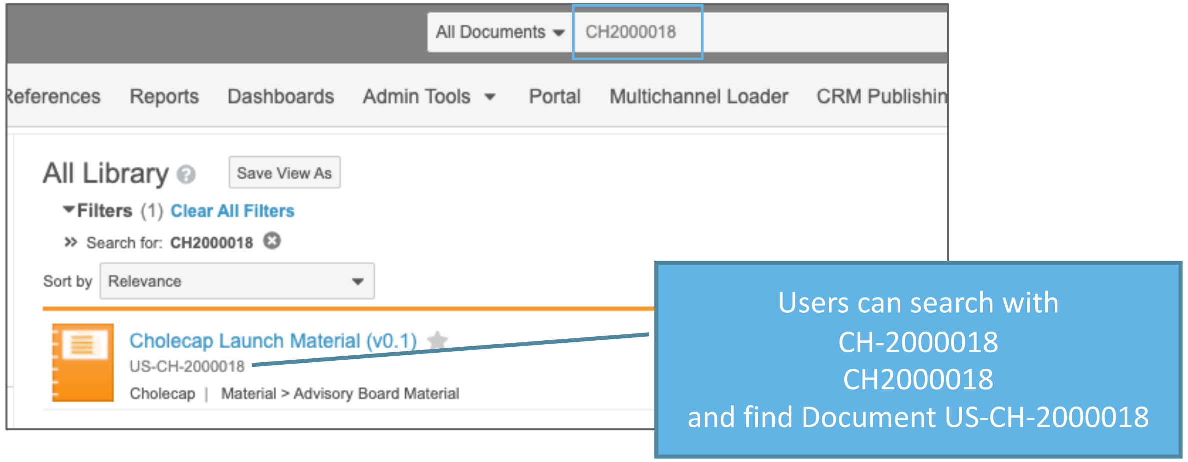
<table>
<tr><th>Search Terms:</th><th colspan="4">Search Result Must Include:</th></tr>
<tr><td>Cholecap<br>Efficacy</td><td colspan="4">Cholecap and Efficacy</td></tr>
<tr><td>Cholecap<br>Efficacy<br>Safety</td><td>Cholecap and Efficacy</td><td>Cholecap and Safety</td><td colspan="2">Efficacy and Safety</td></tr>
<tr><td>Cholecap<br>Efficacy<br>Safety<br>MOA</td><td>Cholecap and Efficacy and Safety</td><td>Cholecap and Efficacy and MOA</td><td>Cholecap and Safety and MOA</td><td>Efficacy and Safety and MOA</td></tr>
</table>

# Minimum Match Logic: Strict Matching

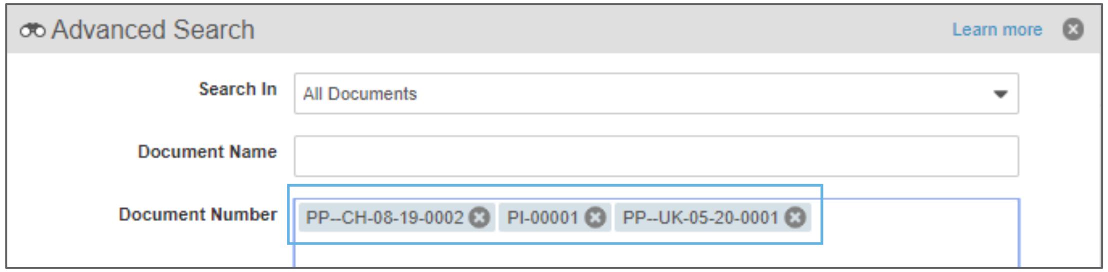
- Configuration
  - This feature is Auto-on but can be turned off by Admins: Admin > Settings > Search Settings > Match Settings > Uncheck 'Enable Strict Matching'

# 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 now search for multiple documents based on different document numbers in Advanced Search

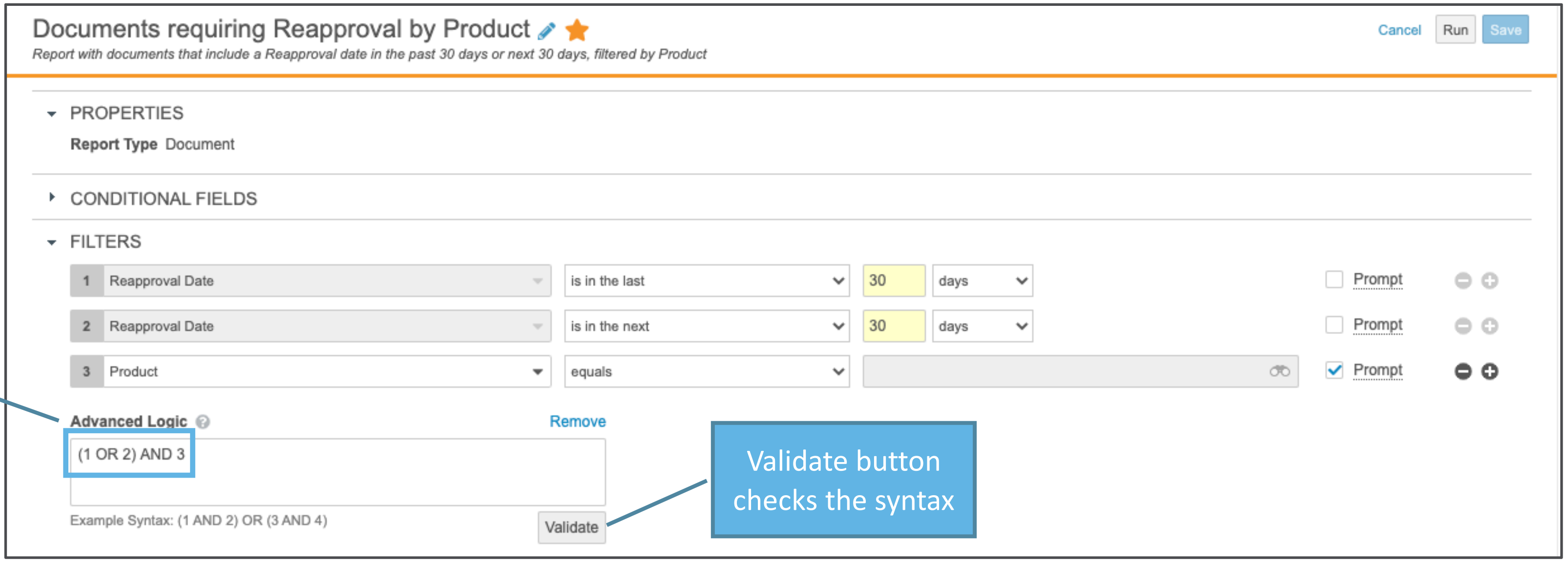


# Auto-On: Reports

# 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



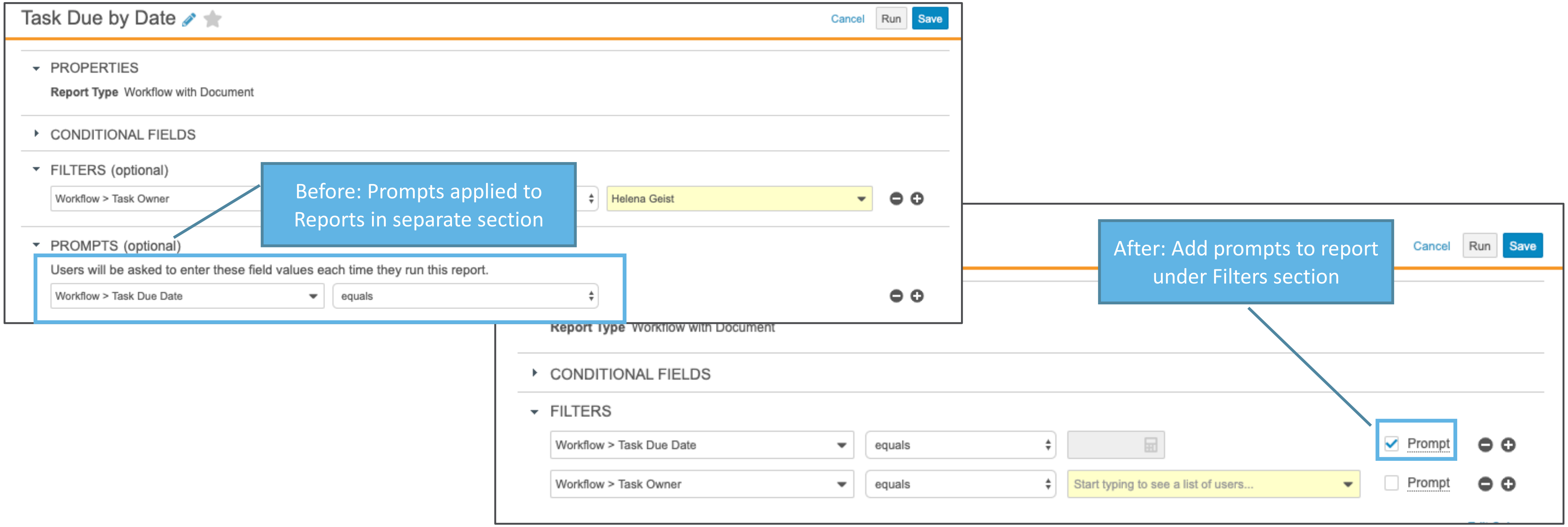

Validate button checks the syntax

# 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

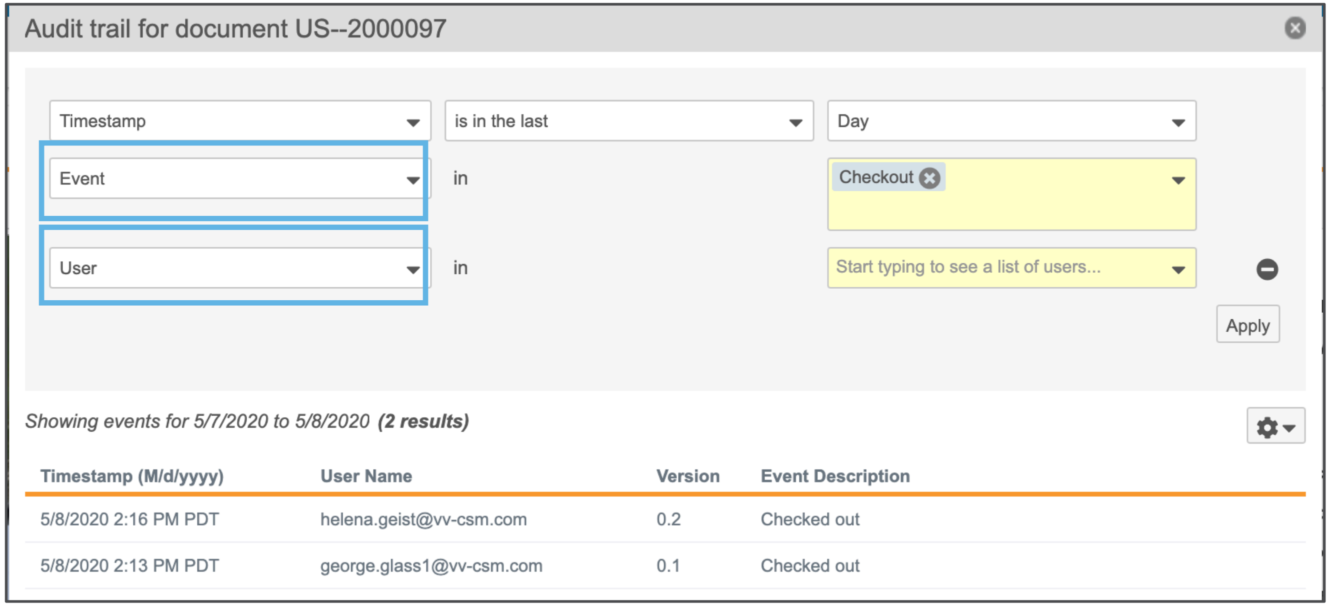
- Overview
  - The ability to create Prompts has been moved to the Filters section of the Report Builder
- Considerations
  - To convert a Filter to be a Prompt, users now simply need to tick the Prompt checkbox



# Auto-On: Audit

# Individual Audit Filters

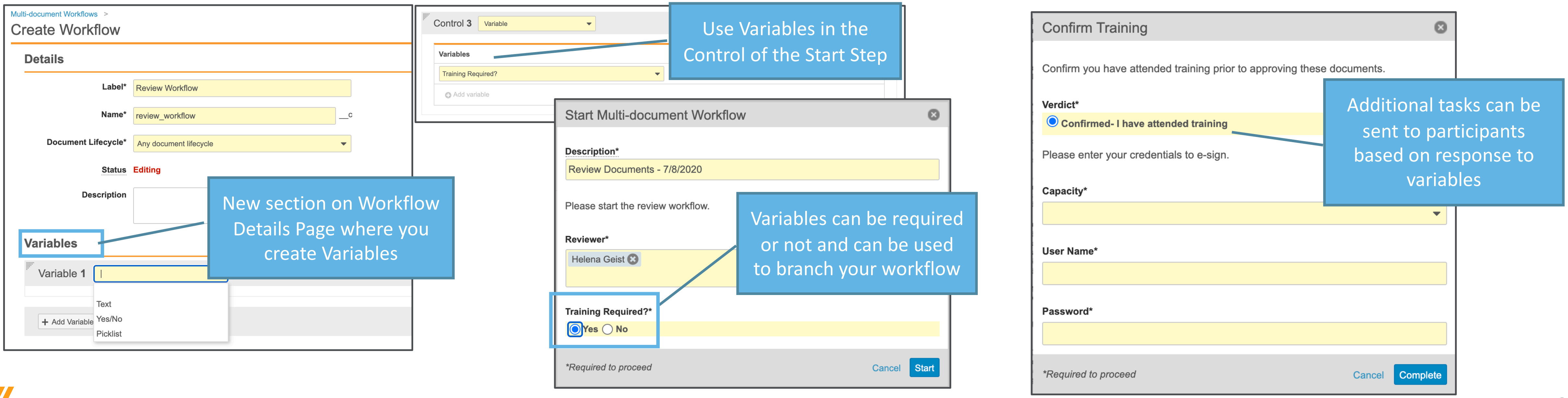
- Overview
  - Users can now apply event and user filters to individual Document and Object Audit Trails, allowing them to more easily find specific activities
- Use Case
  - Filter audit trail to include each time document was checked out for revisions or to include each time a specific user accessed 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



# 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



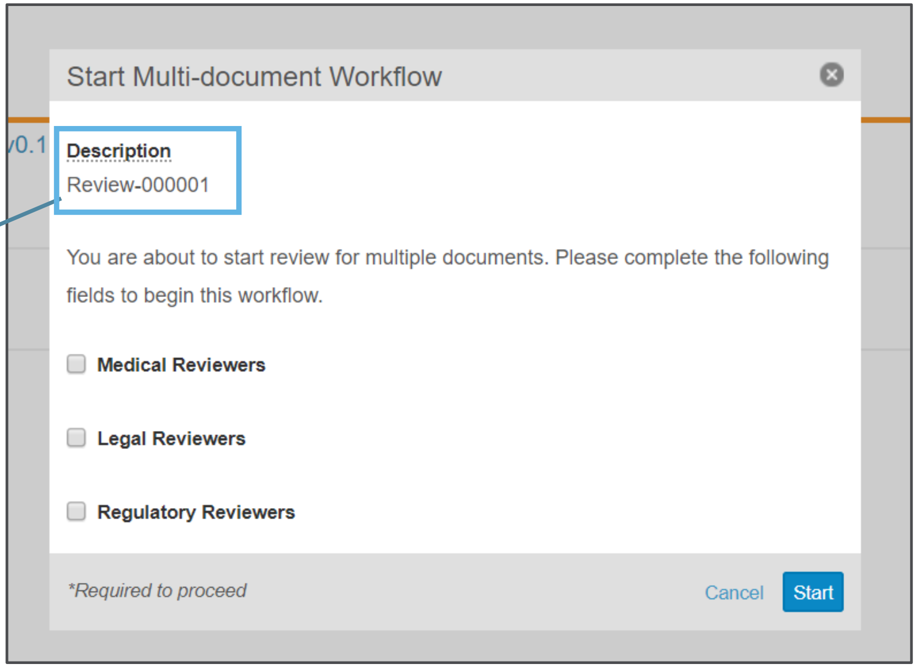
# Multi-Document Workflow: Execute Entry Action & Entry Criteria When Cancelling Workflows or Removing Documents

- 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 Cancelation 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

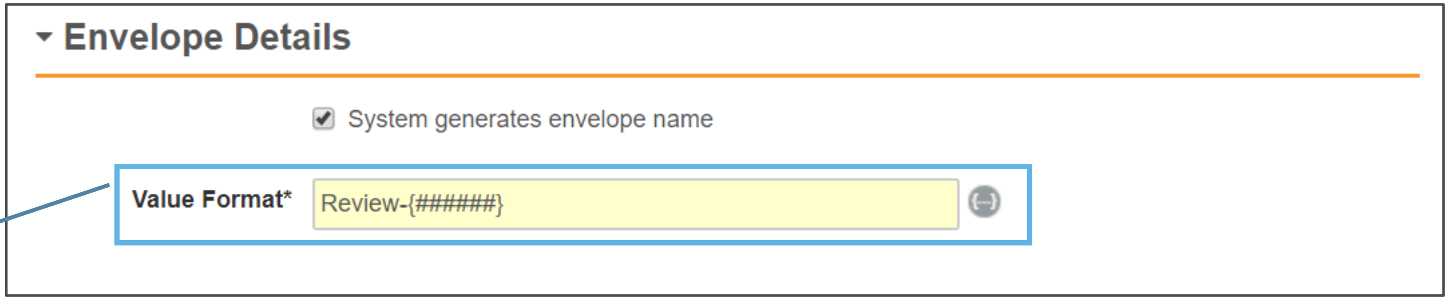
When the Workflow Initiator starts the workflow, the system-generated envelope name will display as a read only value



# Auto-Number Envelope Record for Multi-Document Workflow

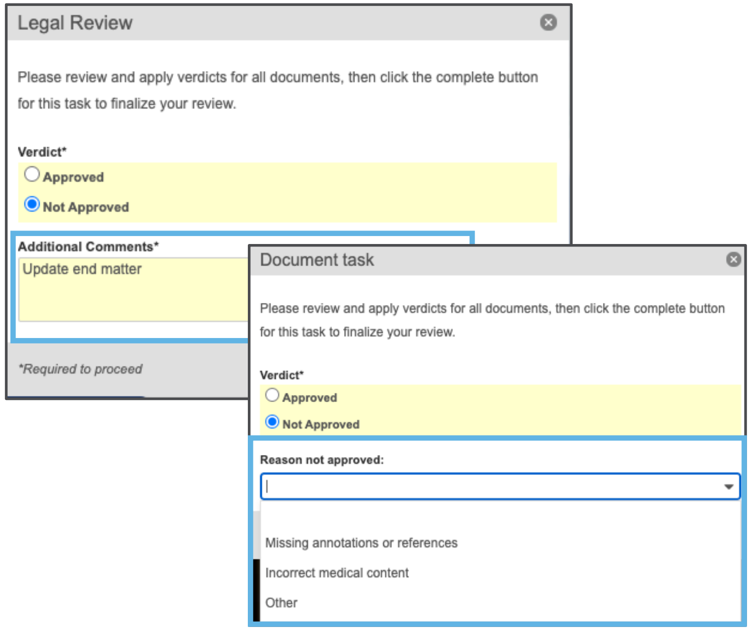
- Considerations
  - Veeva Support Enabled
  - Format: [string of text-{######}] similar to Vault Object Framework system managed record name
- Configuration
  - Once enabled by Veeva Support
    - Admin > Configuration > Multi-document Workflows > [Select Workflow] > Envelope Details > Edit

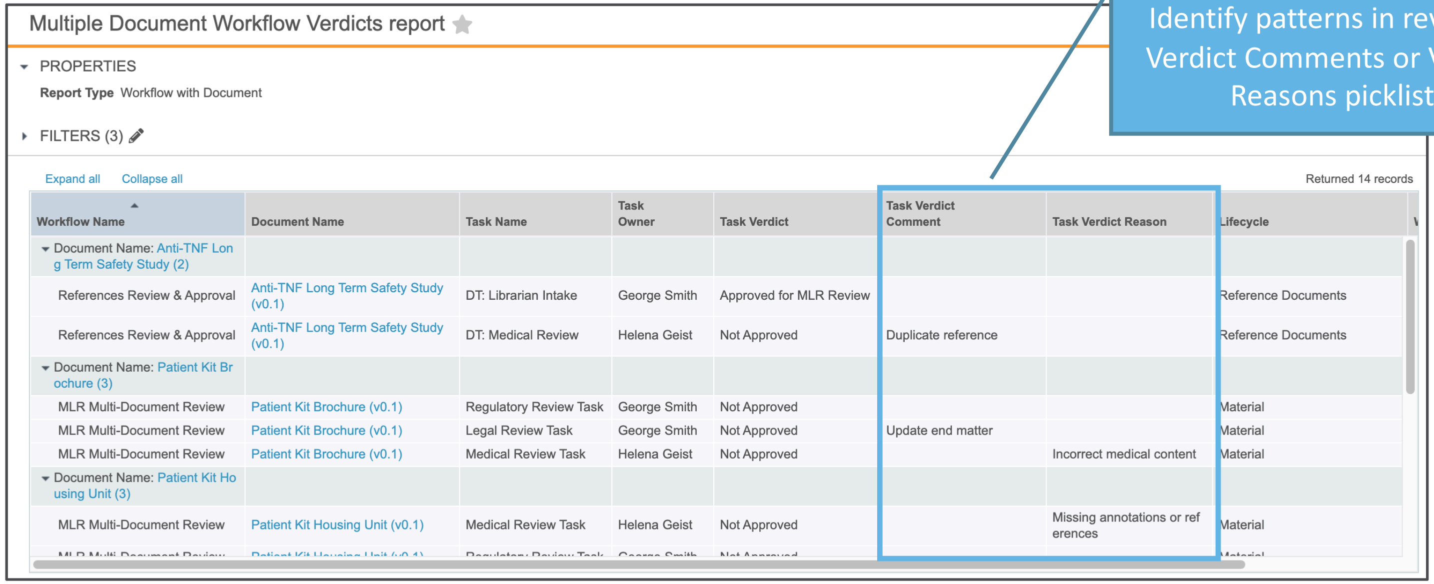
Auto-naming can use any string of text to suit your business needs e.g. ‘Document Review’ or ‘Review’



# 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




| 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 |

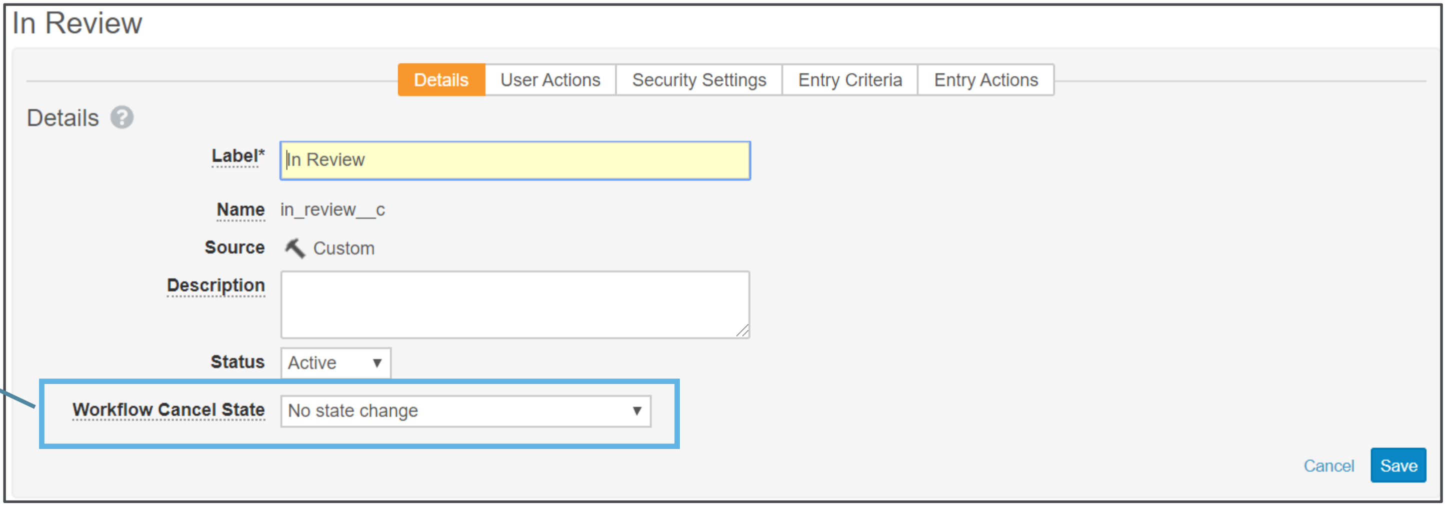
Identify patterns in reviewer Verdict Comments or Verdict Reasons picklist

# 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.

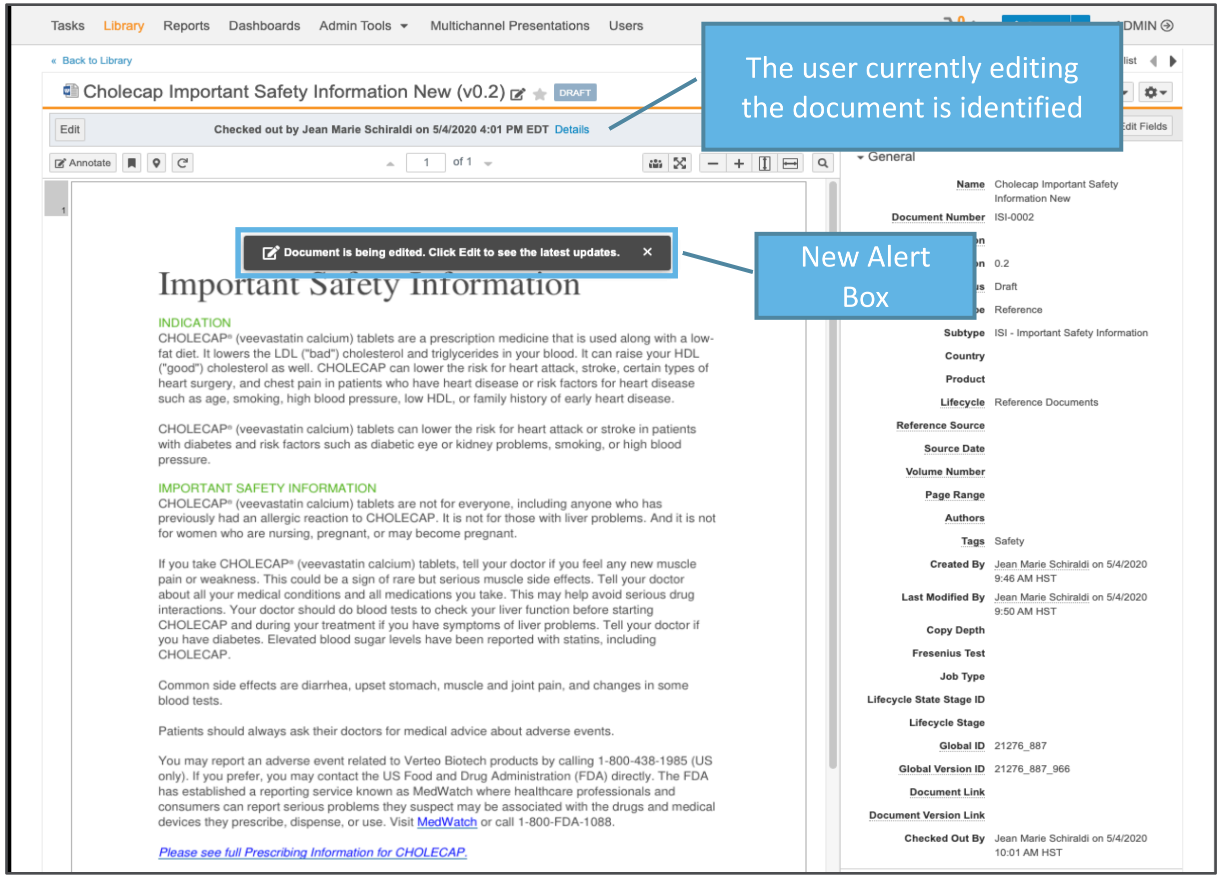


# Collaborative Authoring

# Collaborative Authoring: Alert Box for Documents Being Edited

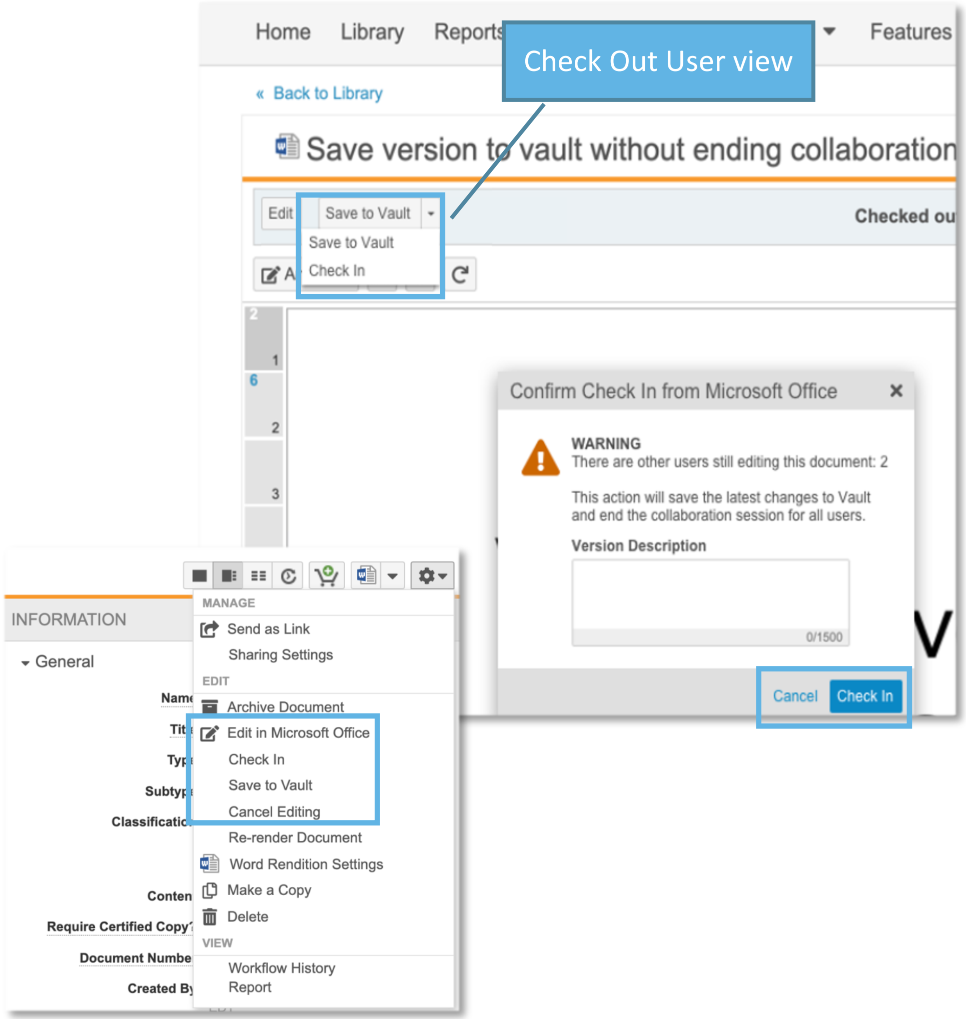
- Overview
  - When a user views a document which is being edited by another user using Collaborative Authoring, Vault displays an alert box which says:


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



# 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

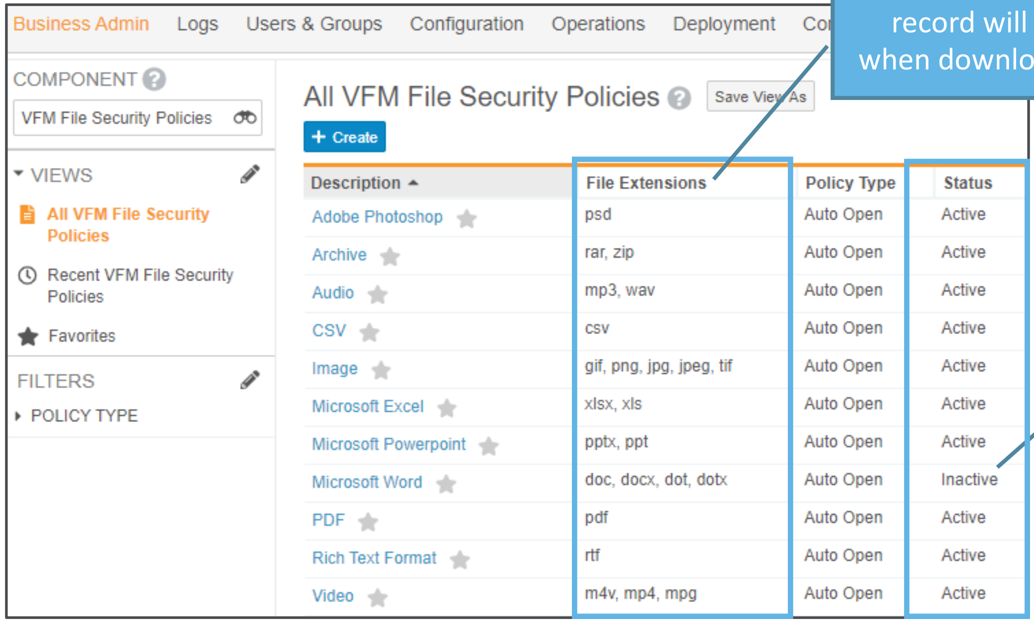


# Vault File Manager

# 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

File extensions not list in a record will not auto open when downloaded to the VFM

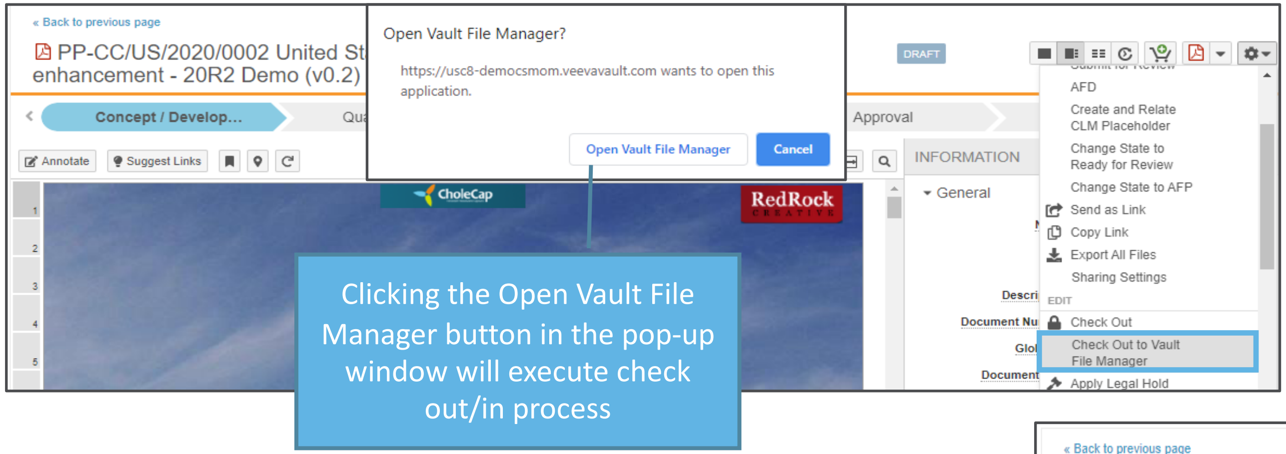


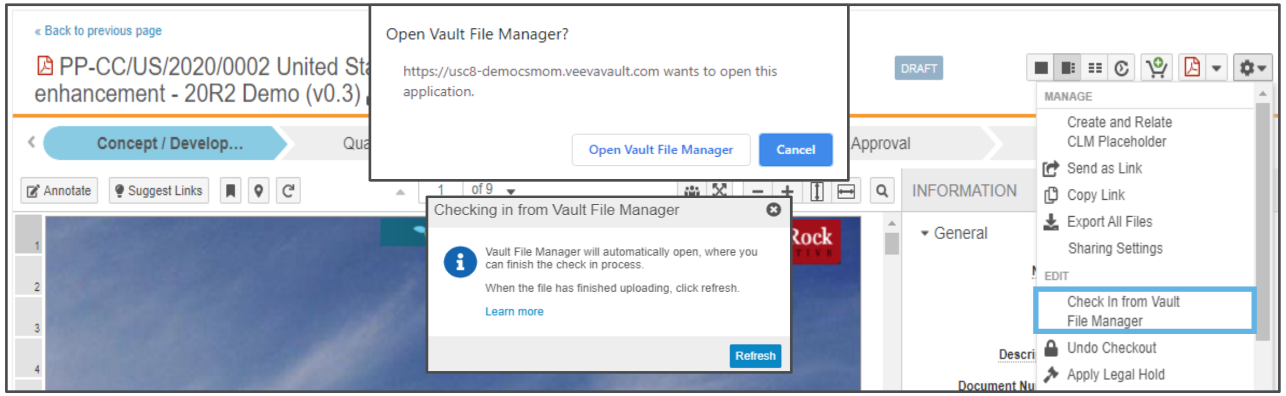

| Description | File Extensions | Policy Type | Status |
|---|---|---|---|
| Adobe Photoshop | psd | Auto Open | Active |
| Archive | rar, zip | Auto Open | Active |
| Audio | mp3, wav | Auto Open | Active |
| CSV | csv | Auto Open | Active |
| Image | gif, png, jpg, jpeg, tif | Auto Open | Active |
| 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 |

An Inactive record status will prevent the listed file extensions from auto opening when downloaded to the VFM

# 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



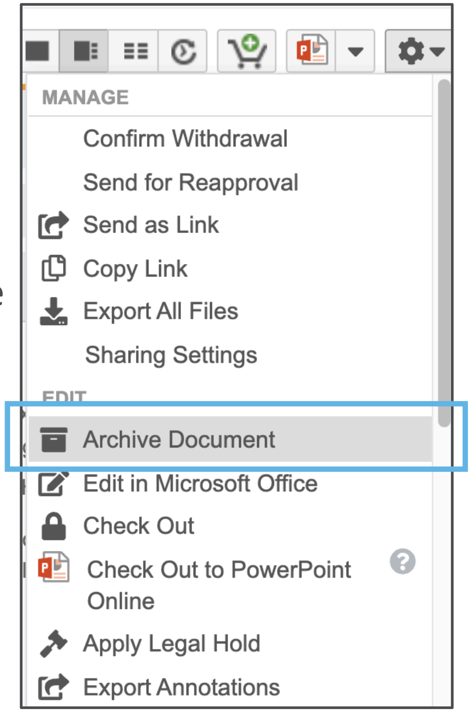
# Archived Documents

# 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

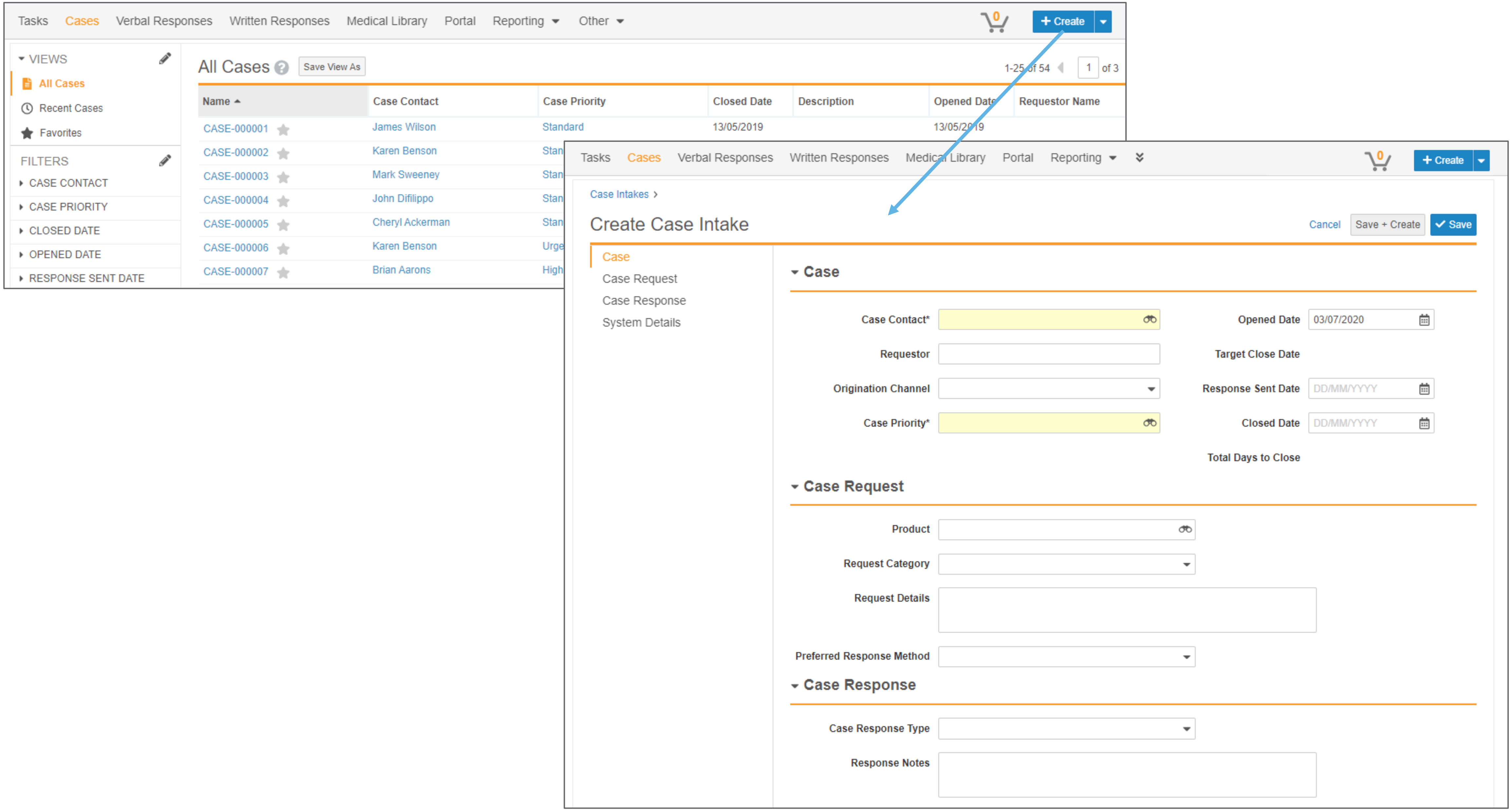
- Overview
  - Unified Medical Inquiry Case Intake introduces a single unified form to improve the capture of Medical Inquiry Cases
  - Users can create the case, enter details of the Case Request and Case Response if they are to process it immediately
- Considerations
  - This feature must be enabled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

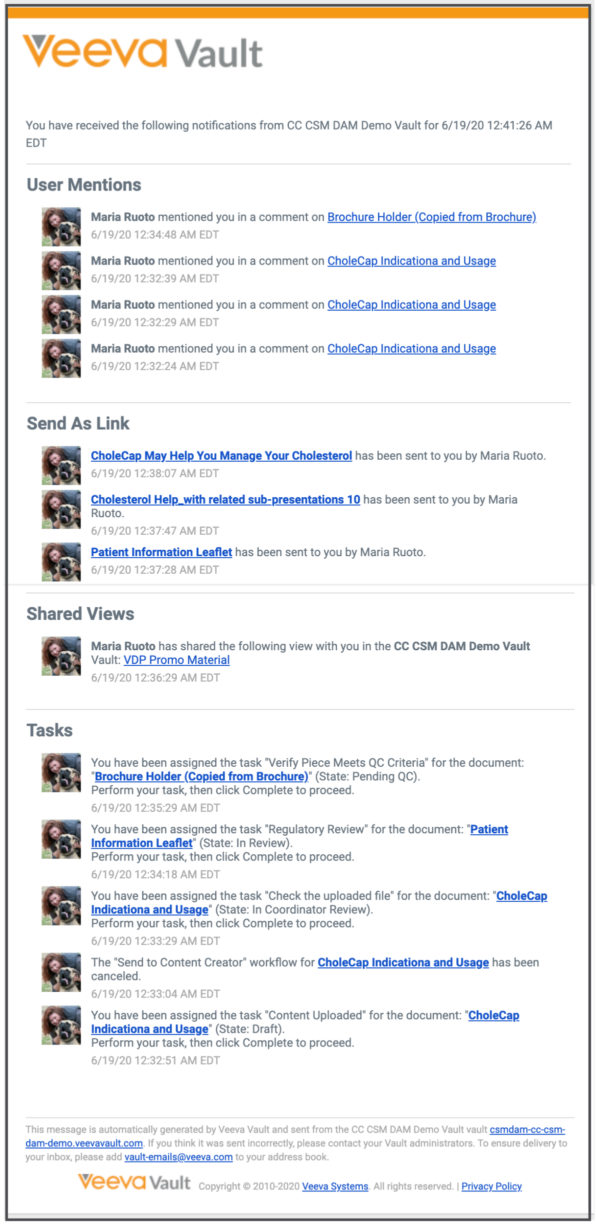
# Unified Medical Inquiry Case Intake Form



# 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 Indicationa and Usage
6/19/20 12:32:39 AM EDT

**Maria Ruoto** mentioned you in a comment on CholeCap Indicationa and Usage
6/19/20 12:32:29 AM EDT

**Maria Ruoto** mentioned you in a comment on CholeCap Indicationa 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** 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 Indicationa 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 Indicationa 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 Indicationa 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

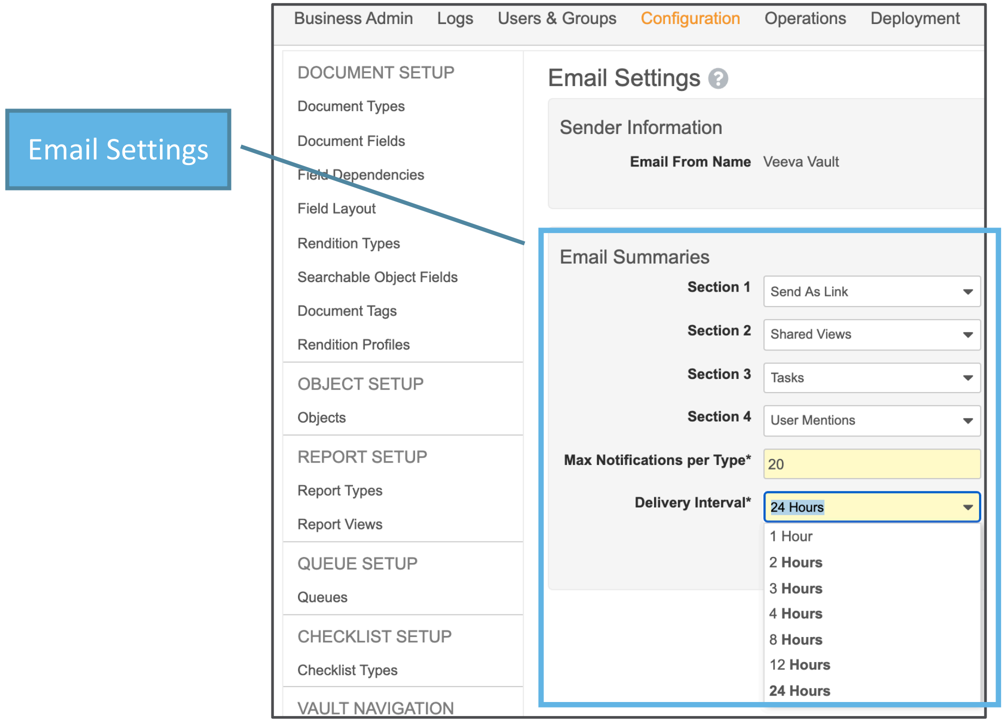
| Name | Email | Title | Security Profile | Send As Link | Tasks | User Mentions | Shared Views |
|---|---|---|---|---|---|---|---|
| Maria Ruoto | maria.ruoto@veeva.com | Customer Success Manager | Vault Owner | Summary | Summary | Summary | Summary |
| Application Owner | dev.null@veeva.com | | Vault 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 | | | | |

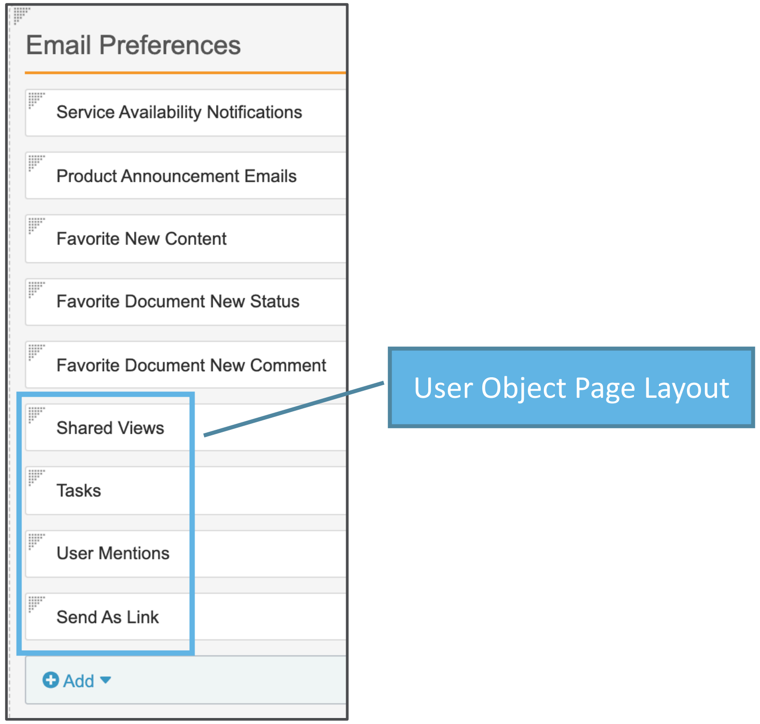
Never
Every Occurrence
Summary

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

# Notification Preferences

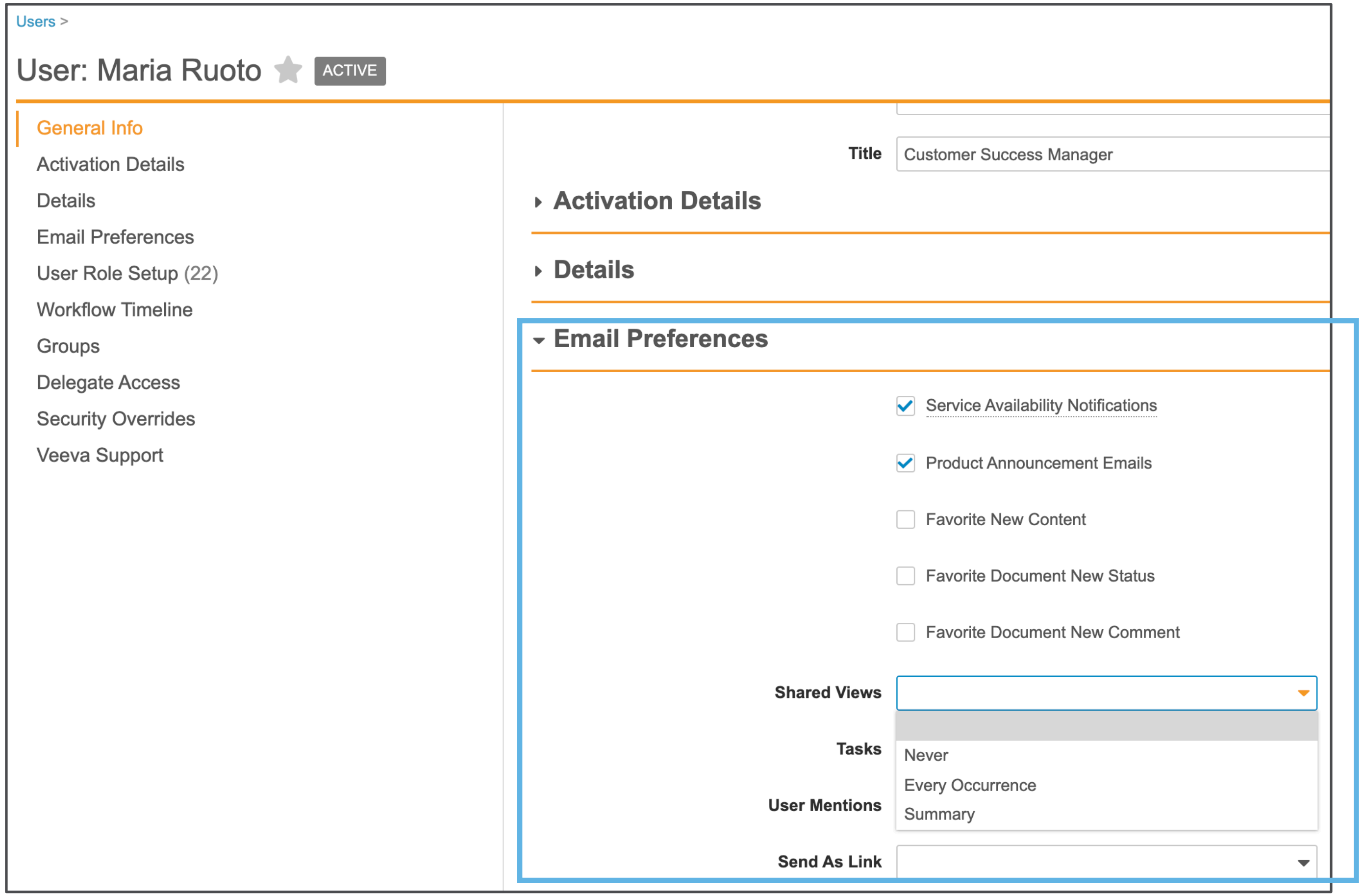
- Configuration: Summary Email Settings
  - Admin > Configuration > Email & Notifications > Email Settings
- Configuration: Add the Shared Views, Tasks, User Mentions, and Send as Link fields to the Email Preferences section of the User Object Page Layout
  - Admin > Configuration > Objects > User >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



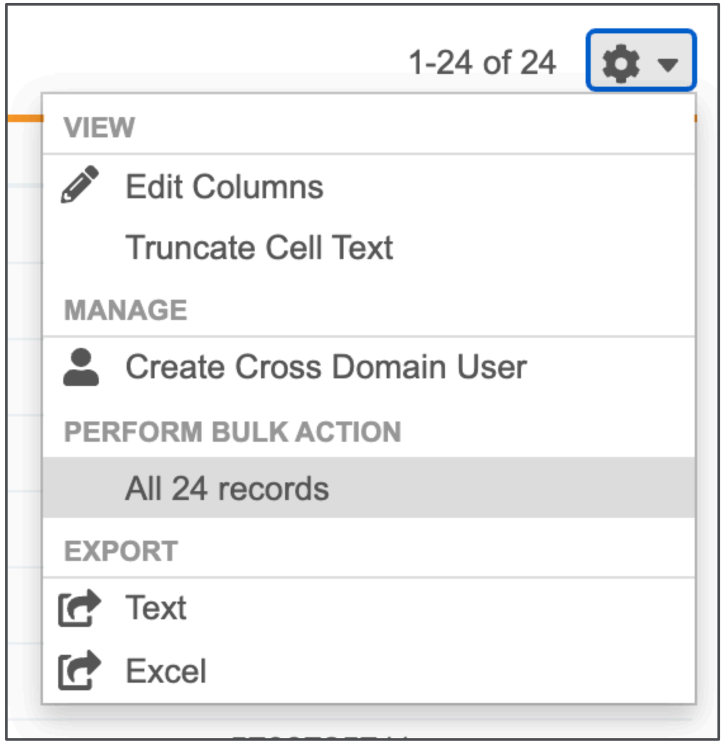
# Notification Preferences

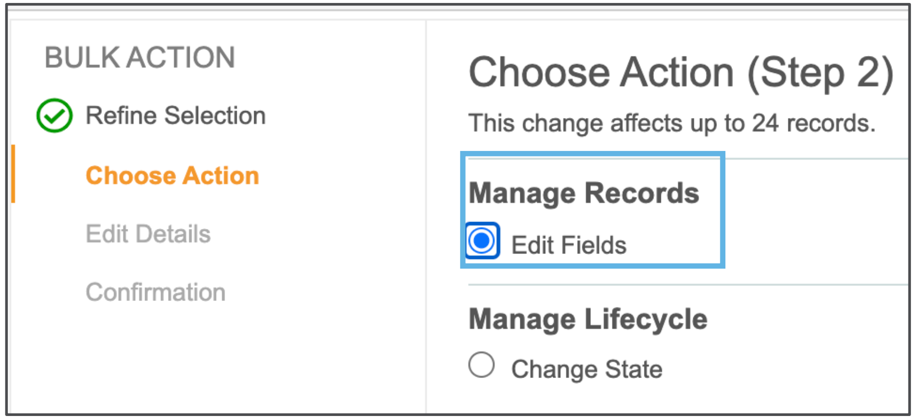
- Configuration: User Object Records
  - Admin > Business Admin > Users > [User Object Record] > Email Preferences

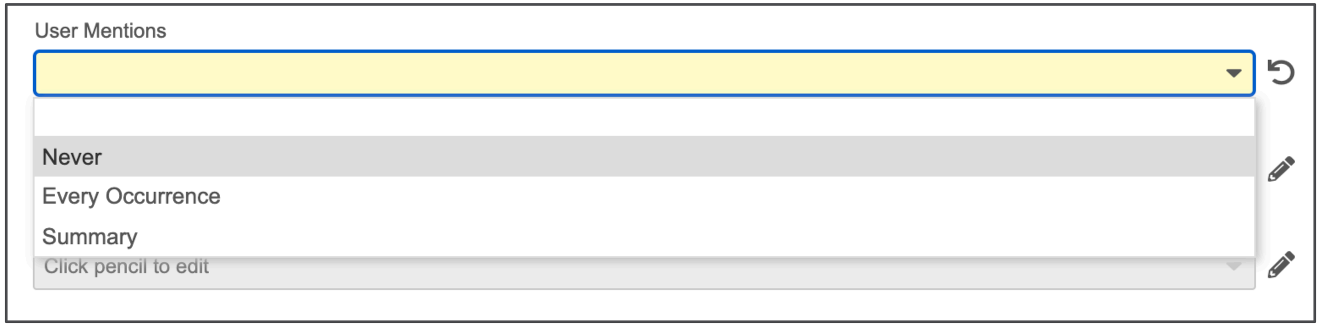


# Notification Preferences

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

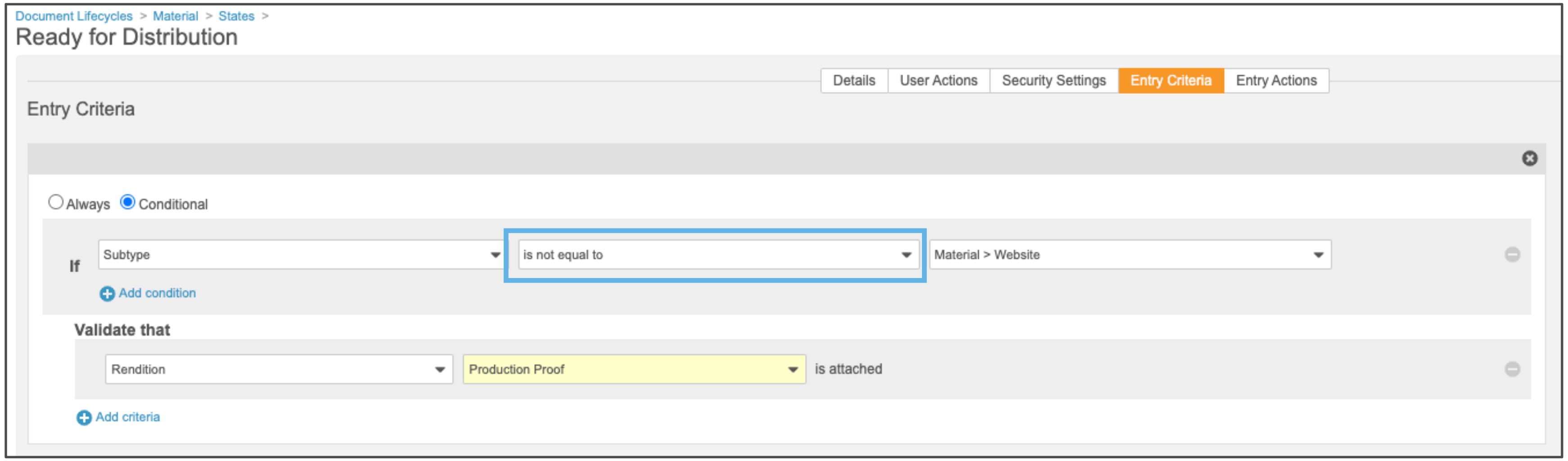


# Additional Operators for Document Lifecycle State Entry Actions, User Actions & Entry Criteria

- 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

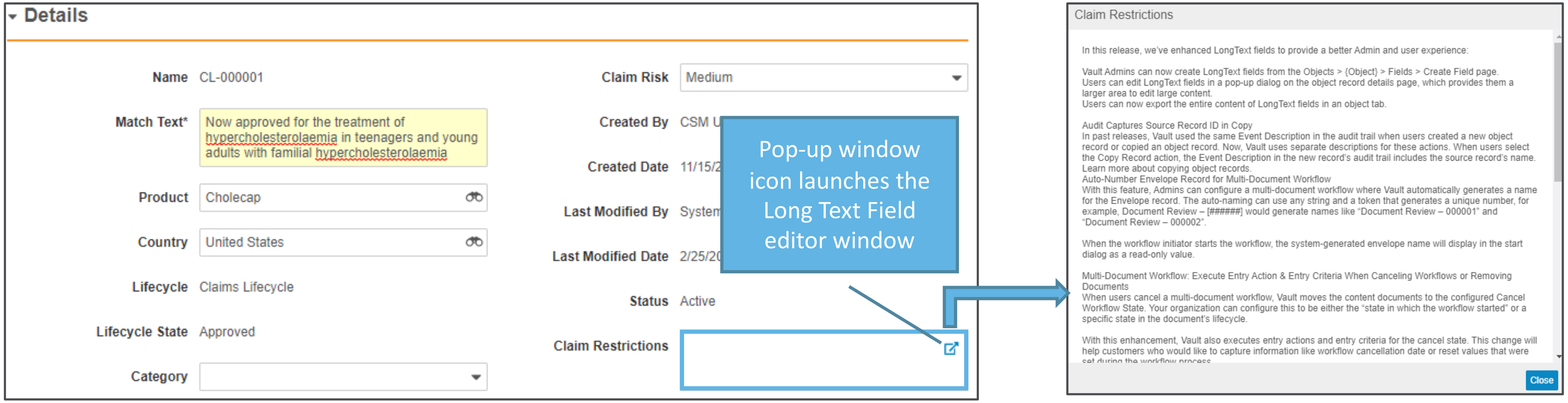


# Additional Operators for Document Lifecycle State Entry Actions, User Actions & Entry Criteria

- 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

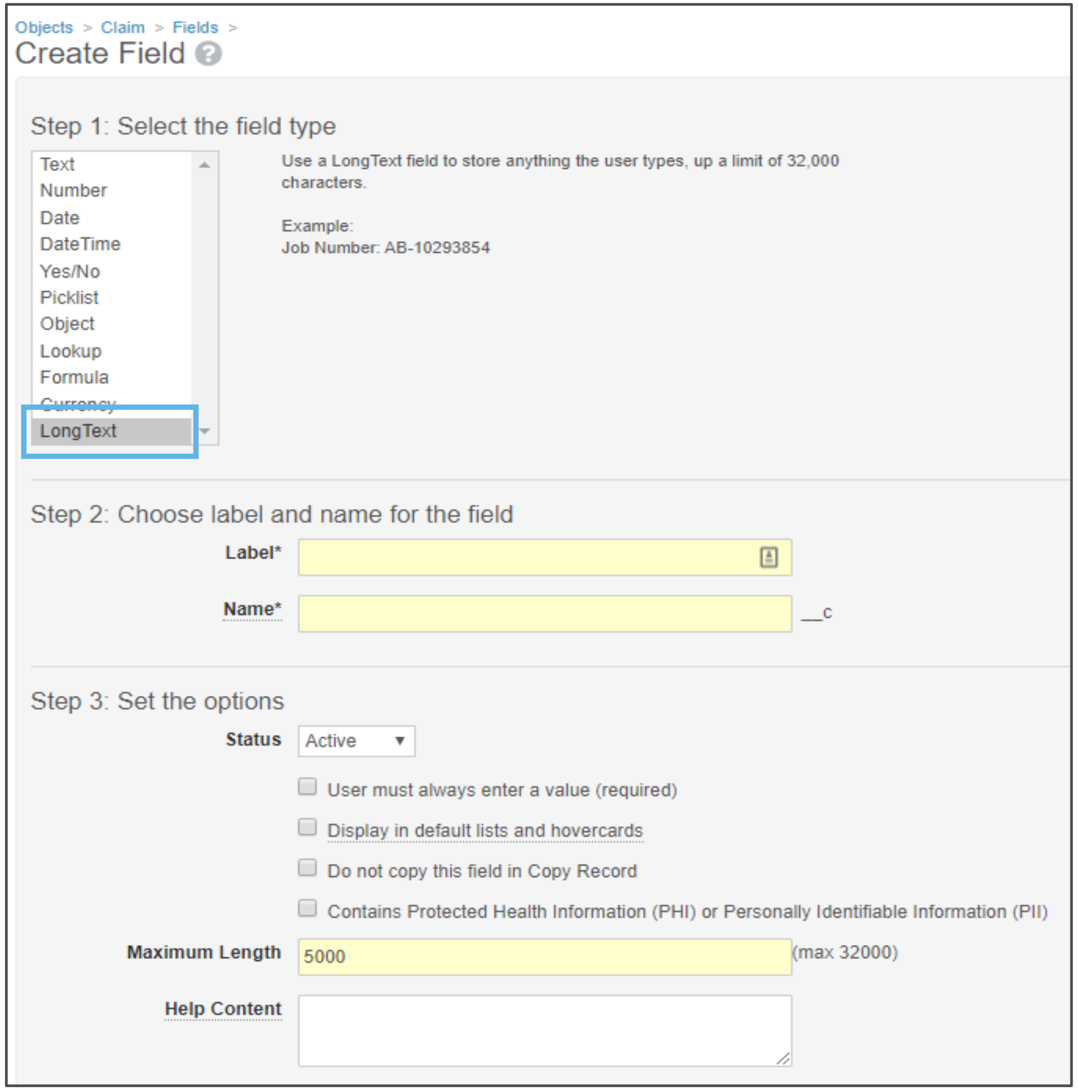
# Long Text Field Enhancements

- 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



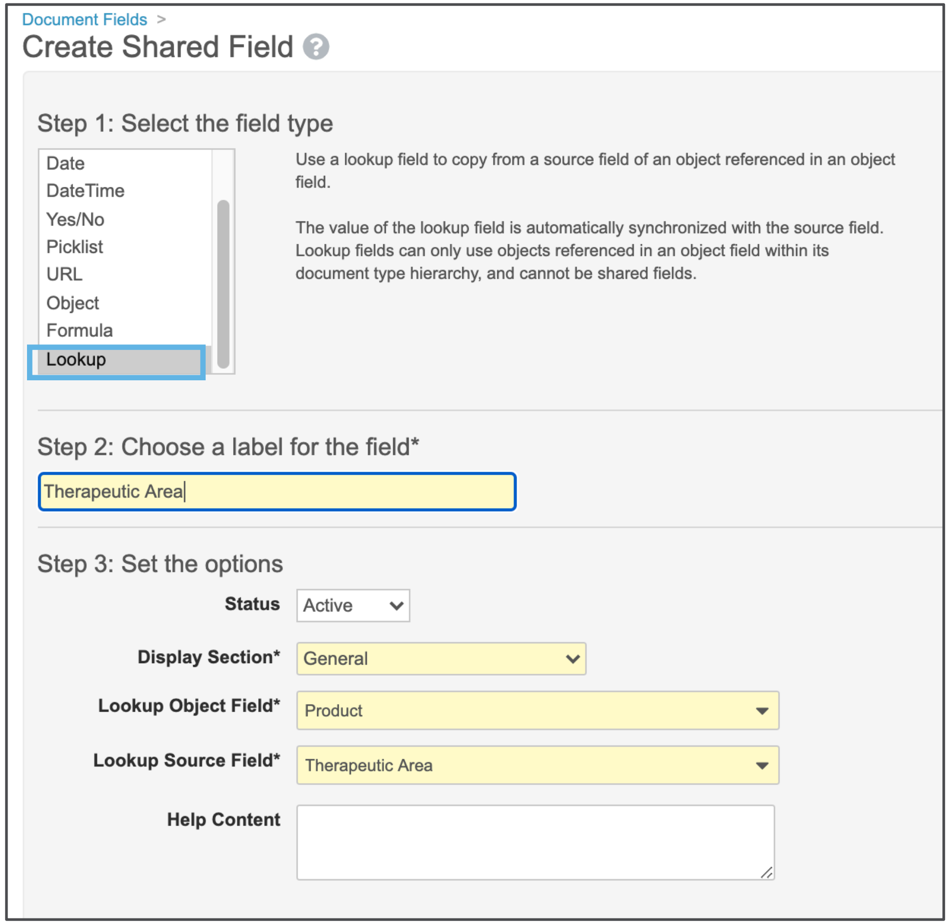
# Long Text Field Enhancement

- Considerations
  - Use Long Text Fields when you need to capture1500 characters or more
  - There is a default limit of 3 Long Text fields per object
- Configuration
  - Admin > Configuration > Objects > {Object} > Fields > Create Field page



# 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



# 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

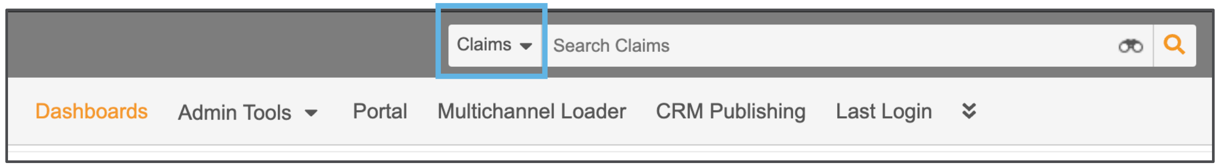

Vault now supports Single Sign-On and eSignature Profiles

# Separate SAML SSO Configuration for Login & eSignature

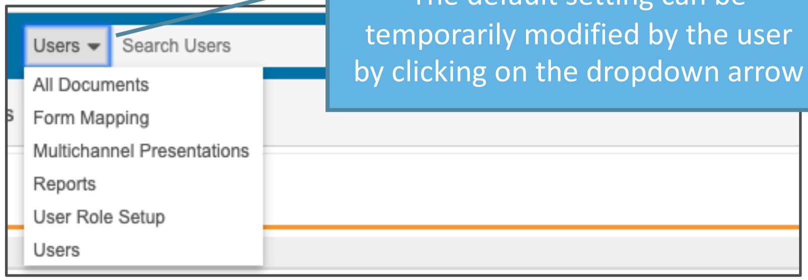
- Considerations
  - Two profile types can be configured
    - Single Sign-on Profile: required for SSO login
    - eSignature Profile: optional, used specifically for signing documents and object records electronically via SAML
  - If no eSignature profile is configured in a Security Policy, the Single 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



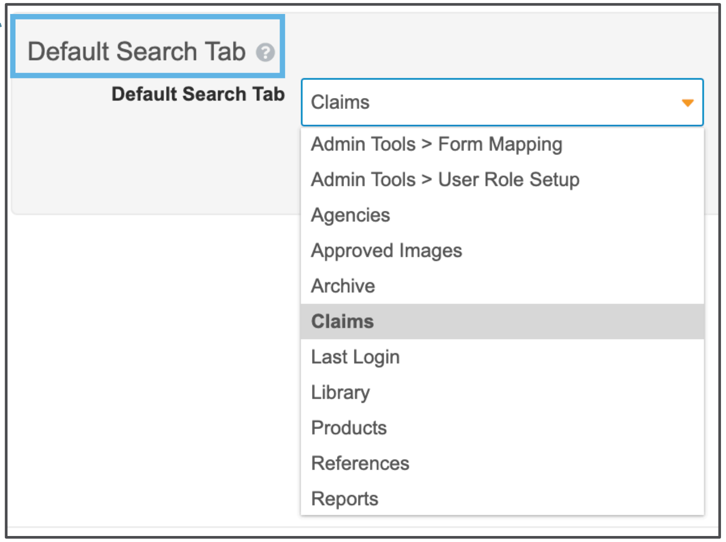

- Considerations
  - Users can temporarily modify the default setting by clicking on the filter dropdown




The default setting can be temporarily modified by the user by clicking on the dropdown arrow

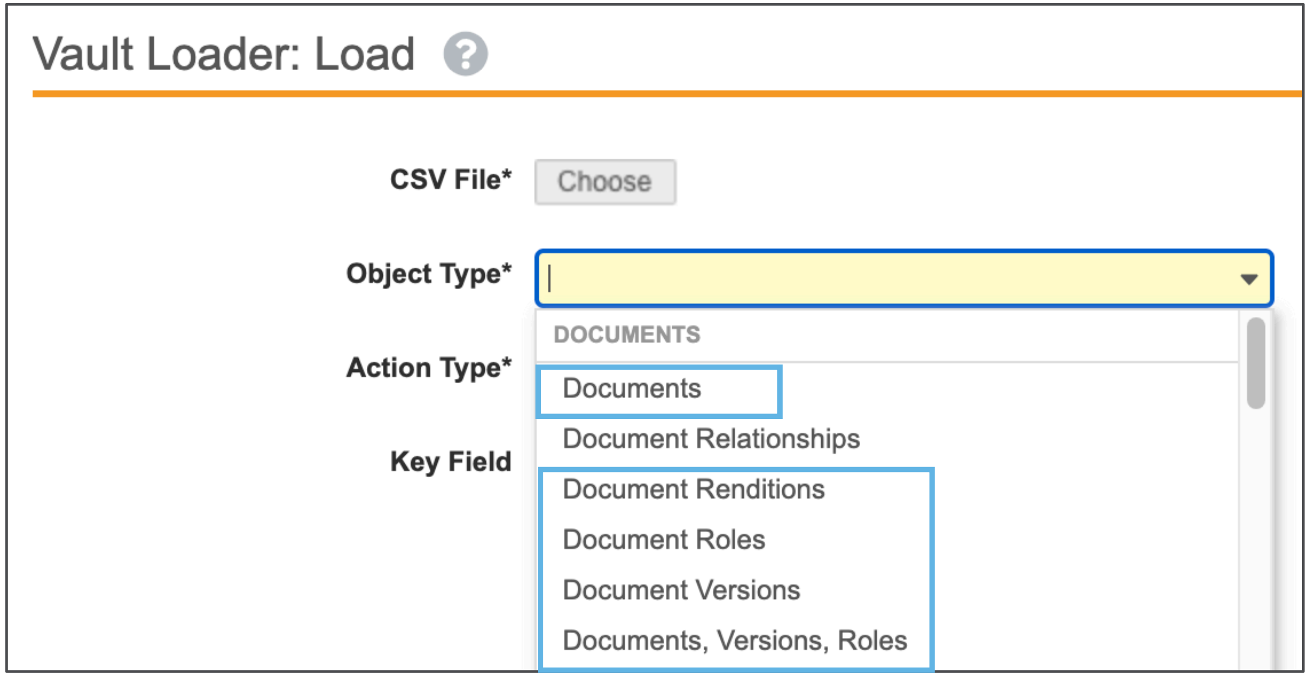
- Configuration
  - Admin > Settings > Search Settings > Default Search Tab

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



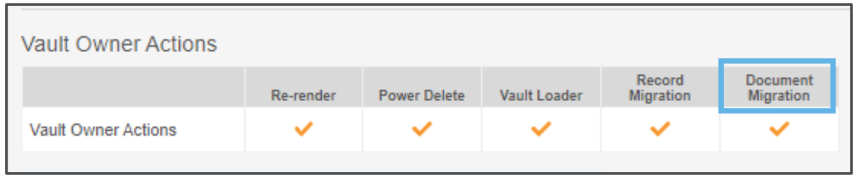
# Document Migration Mode for Vault Loader

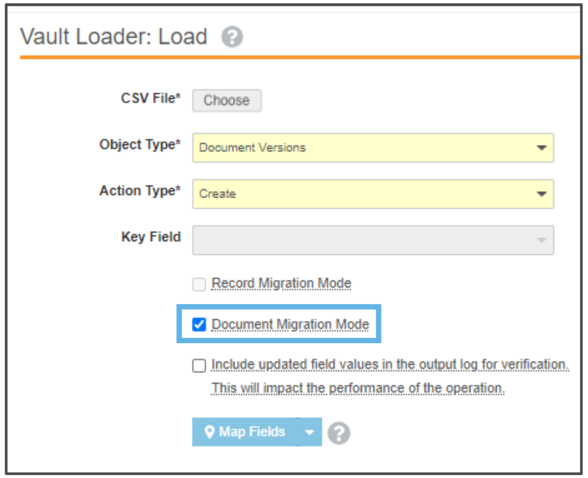
- Overview
  - Vault Loader now allows Document Migration Mode to be only applied to the Action Type Create and the Object Types below without placing the entire Vault into Migration Mode:
    - Document Renditions
    - Document Versions
    - Documents, Versions, Roles



# Document Migration Mode for Vault Loader

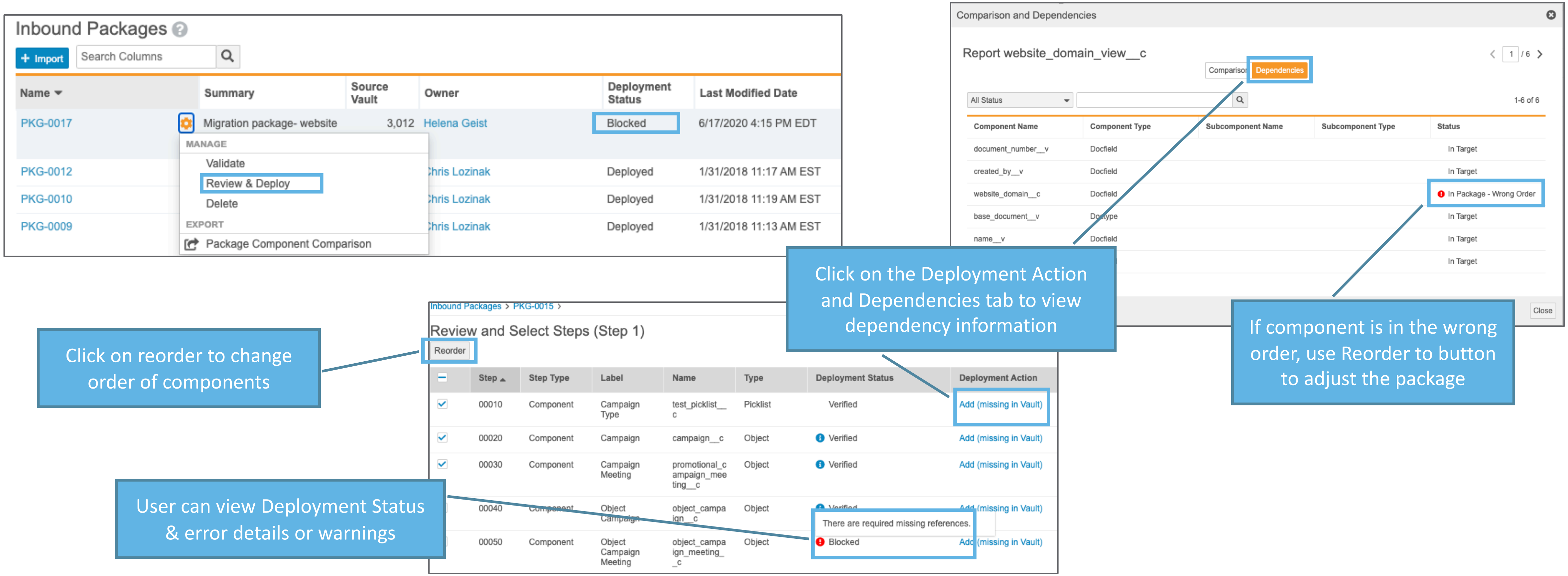
- Considerations
  - In Document Migration Mode Vault will not force one to move document versions through their lifecycles and allows the following import functions:
    - Manual version setting
    - Manual adding of renditions
    - Manual assignment of document numbers
    - Editing of archived
  - 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
- More Information: [Document Migration Mode for Vault Loader]



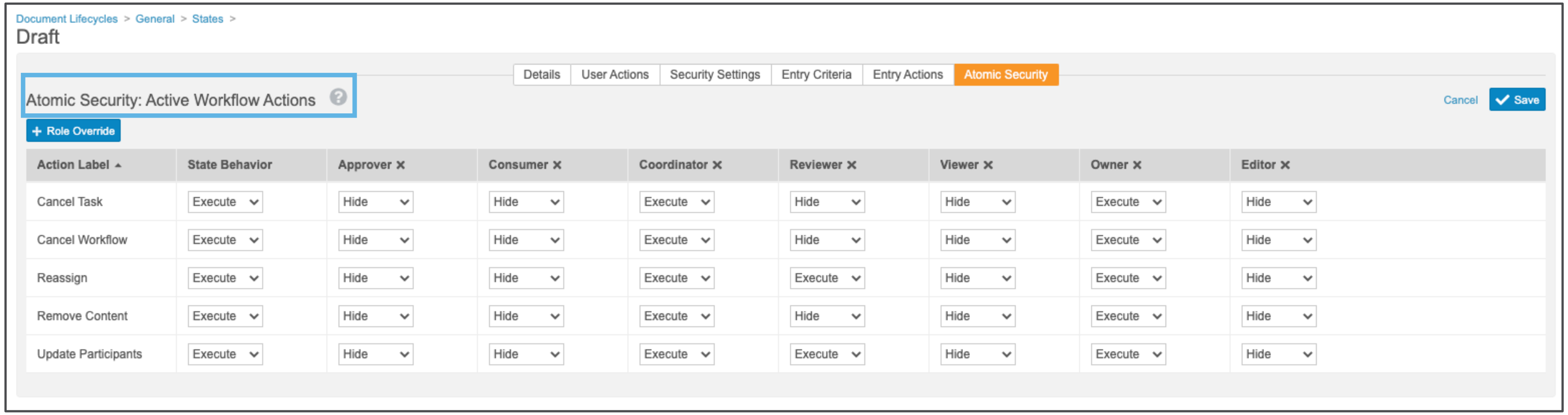
# Inbound Component Dependency Validation

- 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



# Atomic Security for Documents: Active Workflow Actions

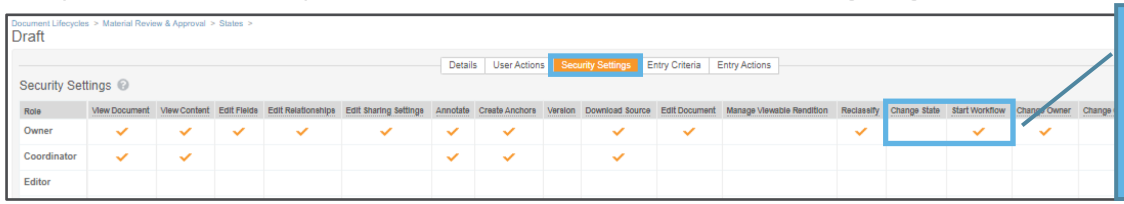
- Overview
  - "Active Workflow Actions" can be granted based on Document Lifecycle State and Lifecycle Role, allowing for greater control over who can Cancel Workflow, Add Participant, Reassign Task, Cancel Task, and Remove Content in a Multi-Document Workflow
- Use Case
  - Users in the Editor Role 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



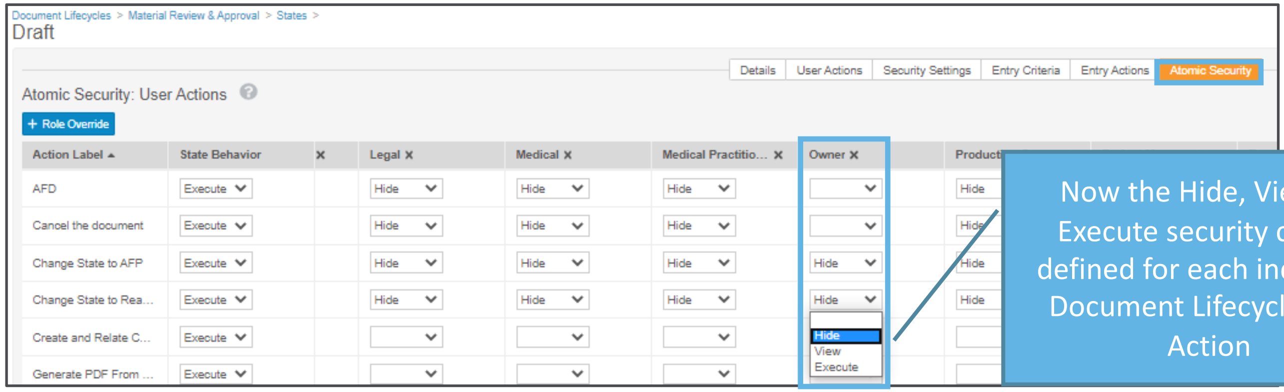

| Action Label | State Behavior | Approver | Consumer | Coordinator | Reviewer | Viewer | Owner | Editor |
|---|---|---|---|---|---|---|---|---|
| Cancel Task | Execute | Hide | Hide | Execute | Hide | Hide | Execute | Hide |
| Cancel Workflow | Execute | Hide | Hide | Execute | Hide | Hide | Execute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

# 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



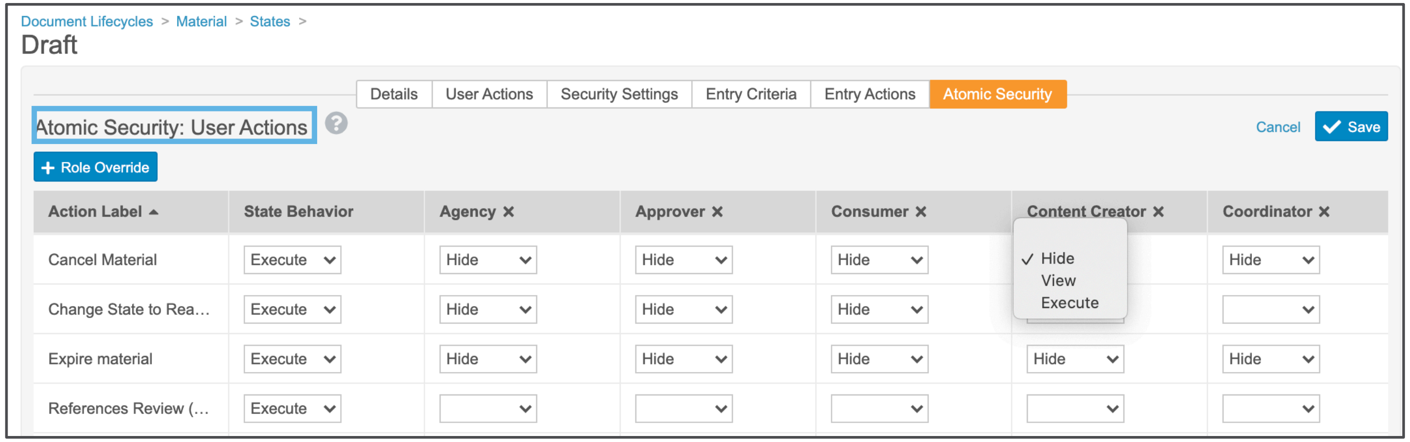

Now the Hide, View, or Execute security can be defined for each individual Document Lifecycle User Action

  - 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

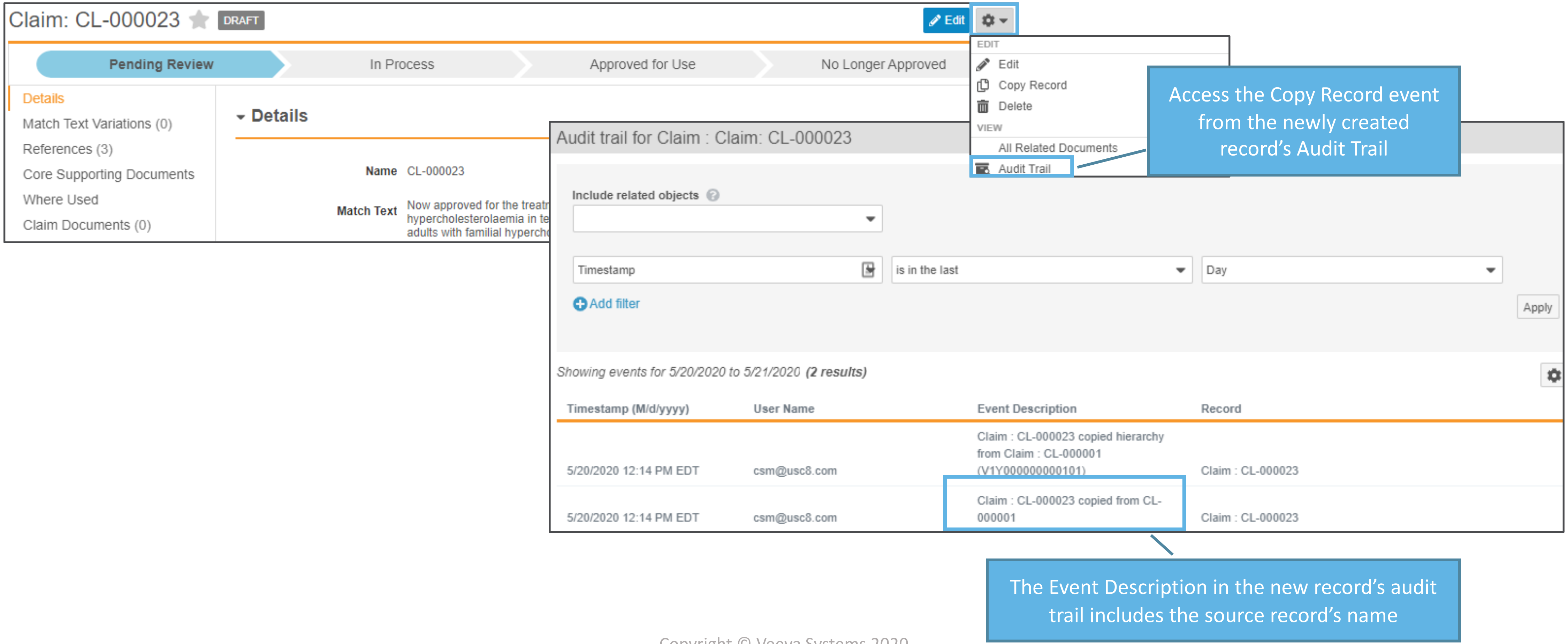
- Considerations
  - Upon enablement Vault performs the following migration actions:
    - For all configured user actions (previously controlled by Start Workflow and Change State permissions), Vault will set the State Behavior to Execute
    - Vault will apply overrides to hide these actions for any 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



# Objects

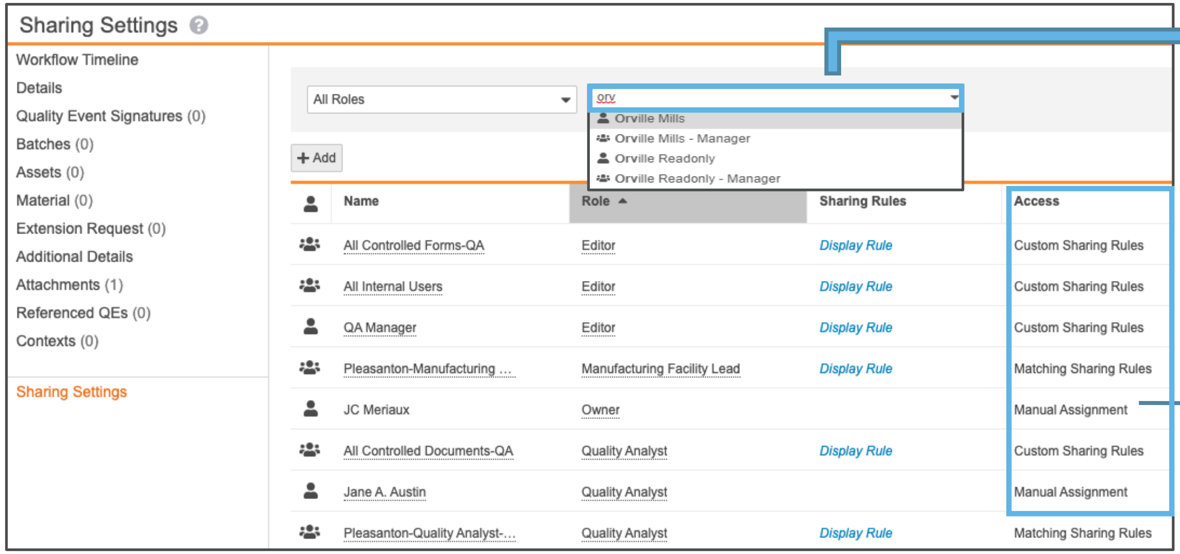
# Audit Captures Source Record ID in Copy

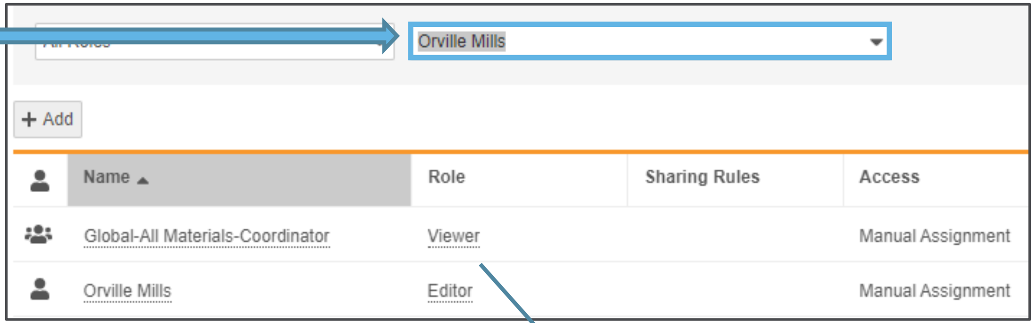
- Overview
  - Vault Object Framework (VOF) audit trail is enhanced to capture the Copy Record event as a separate event description
  - The source ID of the record from which the record is copied is now captured in the log



# 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



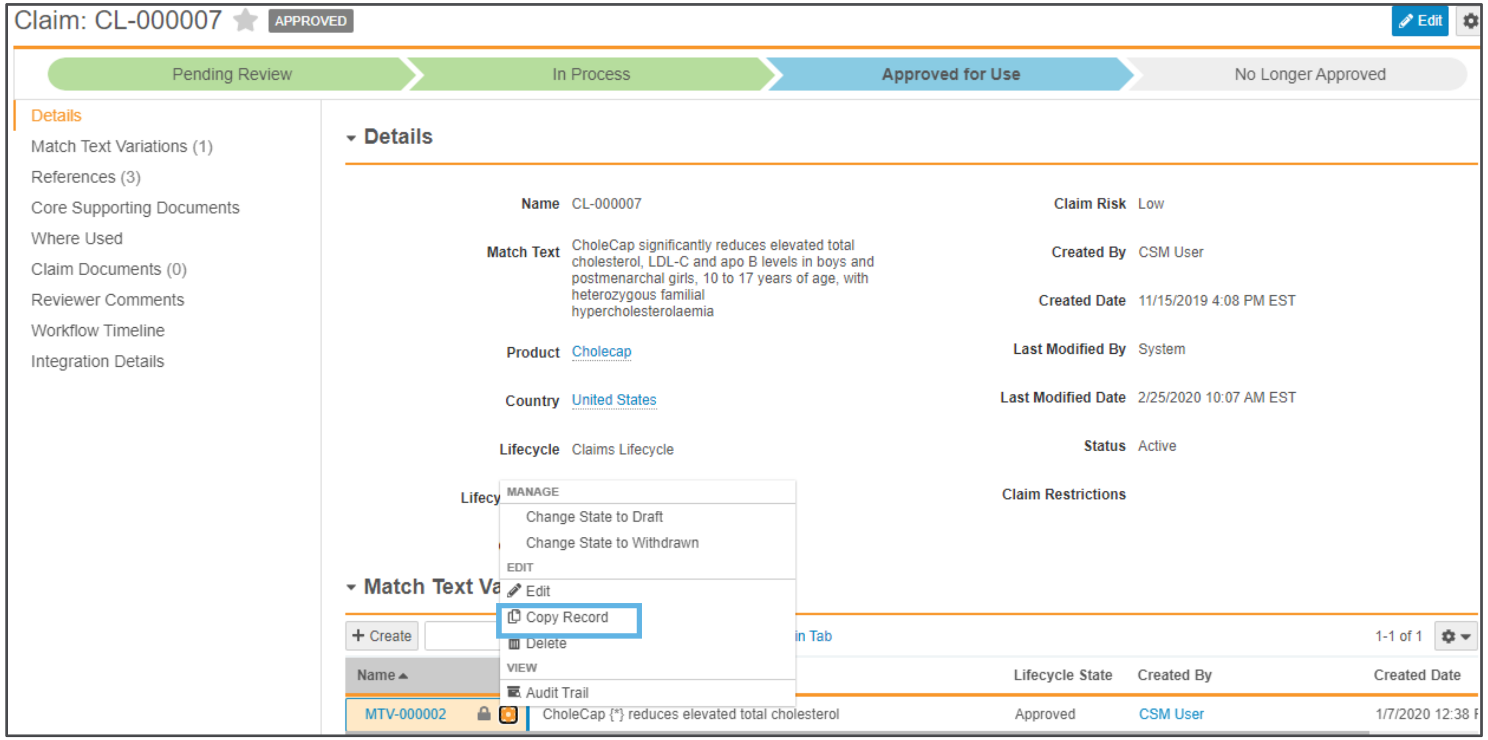

The Access column indicates how the role is assigned (custom, manual, or matching)

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

- 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



# Resources

# Resources

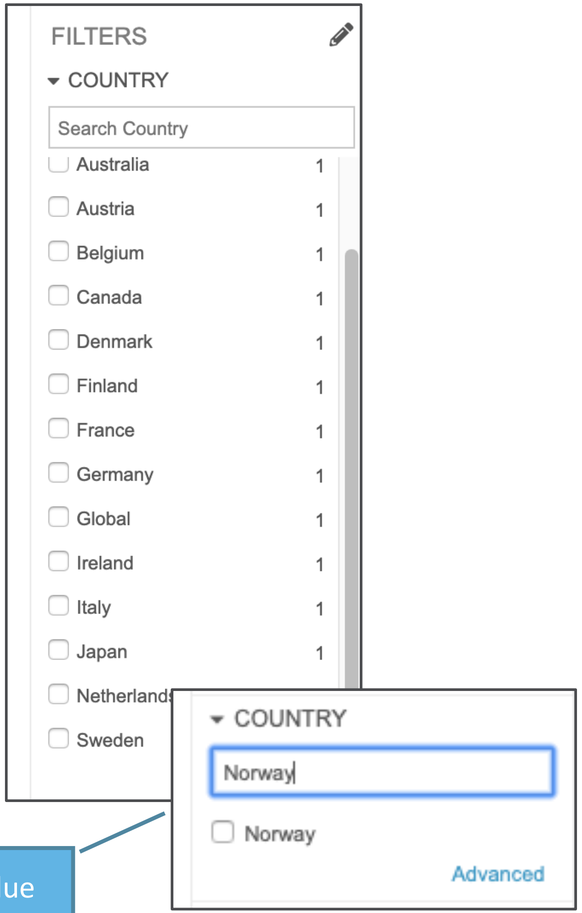
- Contact your Customer Success Manger
- Email: VaultCustomerSuccess@veeva.com
- Vault Resource Library: https://support.veeva.com/hc/en-us/articles/360013243773-Veeva-Vault-Educational-Resource-Library
- Vault Help: http://vaulthelp2.vod309.com/wordpress/
- Vault Standard Metrics Resource Center: https://www.veeva.com/vault-promomats-standard-metrics/

Thank you

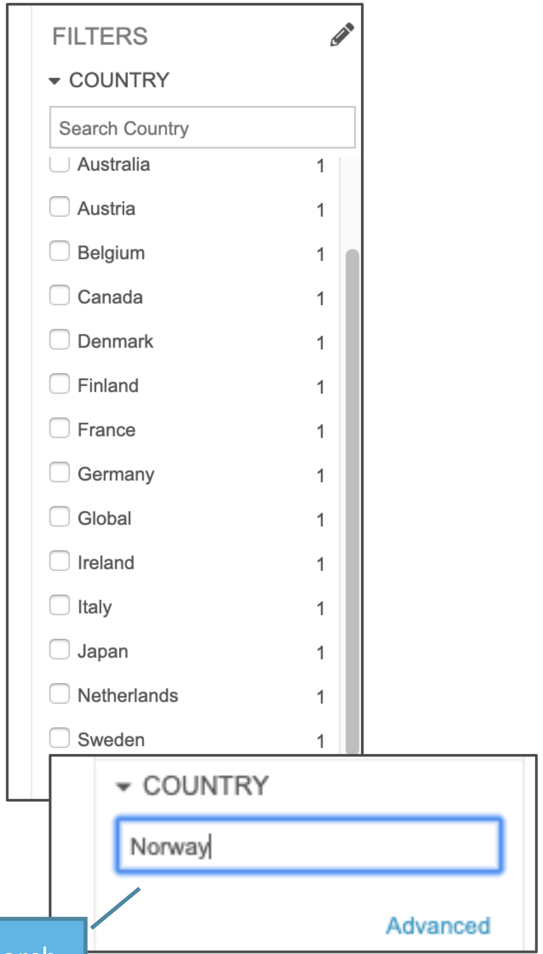
# Appendix

# 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



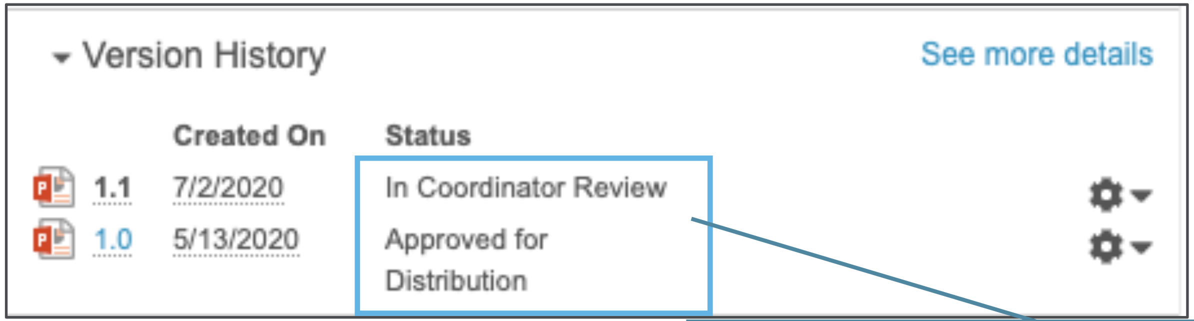

Before: Norway does not appear as value for Object Reference Field, but when searched, appears with checkbox



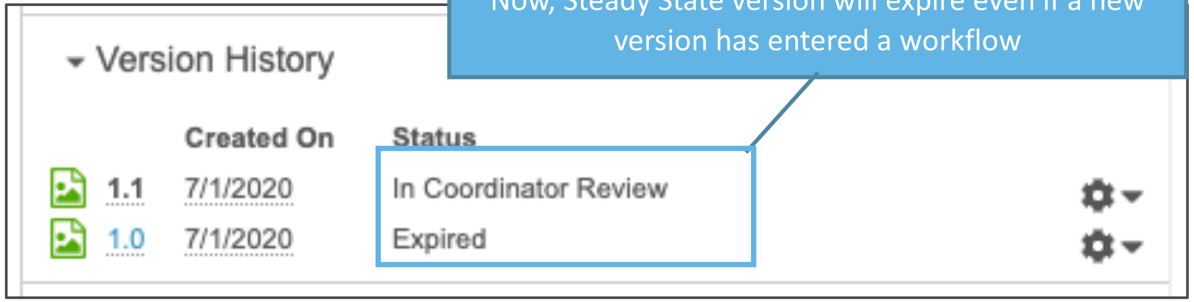

After: When Norway is entered into search box, no result is given

# 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




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




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

Details | Fields | Relationships | List Layout | Page Layouts | Actions | Validation Rules

Fields

| 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

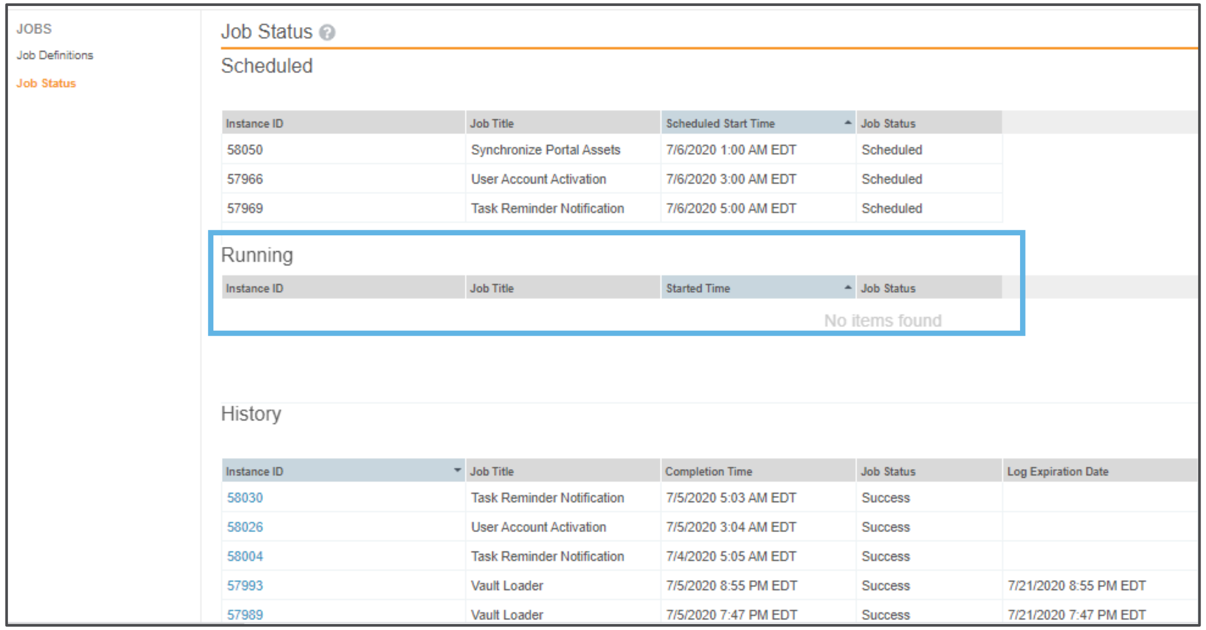
- Overview
  - The following fields have been added to documents:
    - *Annotations (Claim Links)* (annotations_claim__v) - count of links created by manually linking to a Claim record
    - *Annotations (Auto Links)* (annotations_auto__v) - count of links created by Suggest Links when Auto Links feature 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



# 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

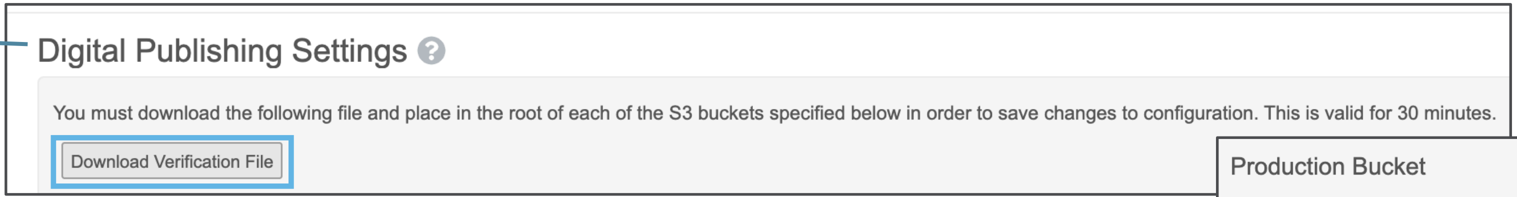
# Localize Vault: Hungarian & Dutch

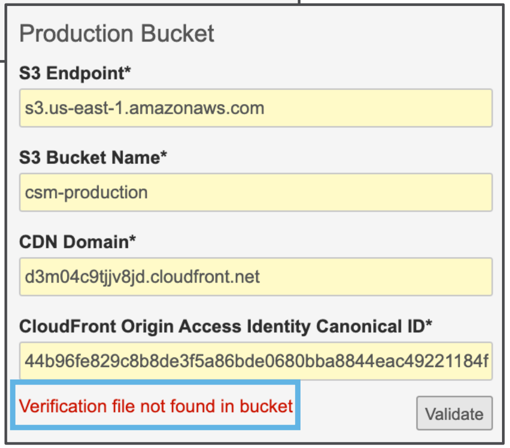
- Localize Vault to Hungarian
  - Overview:
    - The Veeva Vault UI now supports Hungarian
    - Vault also supports setting Hungarian translations for labels in user-configurable data such as document types, fields, picklist values, and lifecycle names; learn more about supported languages and localization 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'




  - 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

# 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

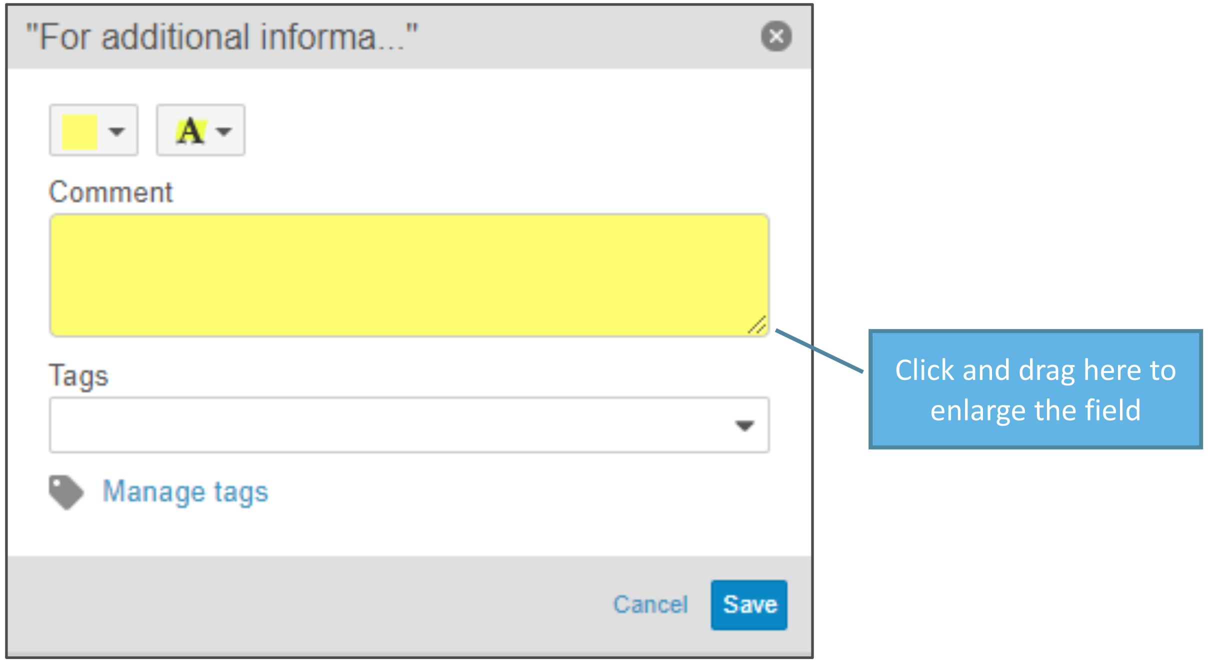
Client Applications

| | 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

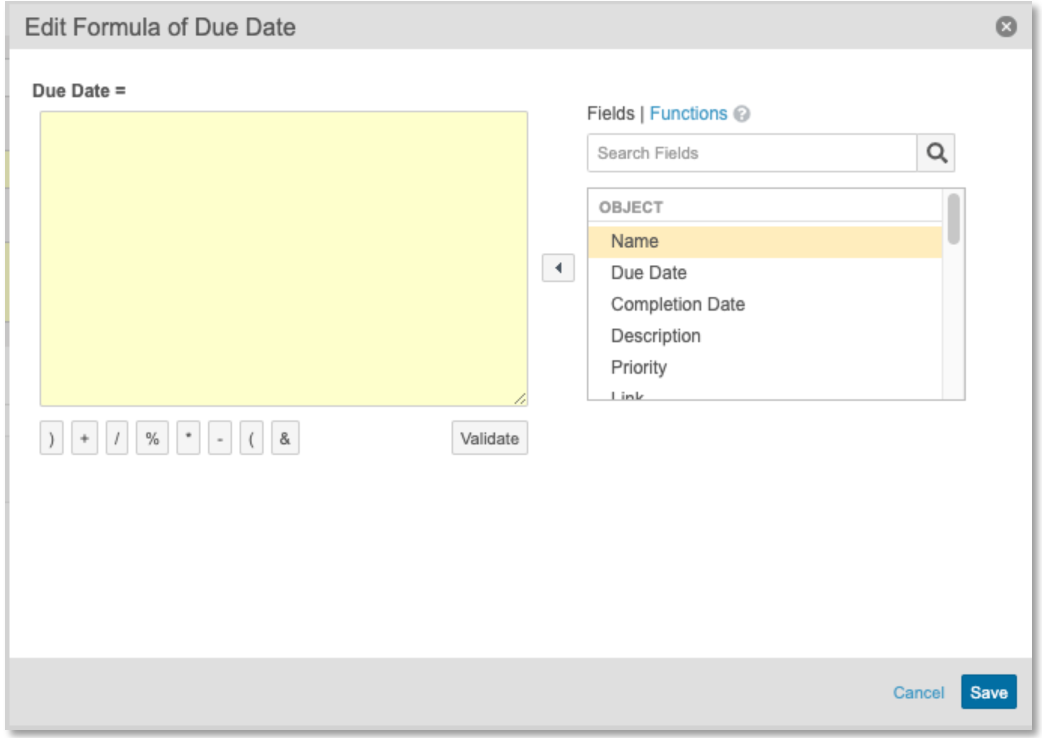
- Overview
  - The ability to manually resize the Comment Field in Create Annotation and Edit Annotation dialog has been restored
- Considerations
  - The Comment Field can be resized vertically but cannot be made wider
  - When resized, the entire dialog will increase to accommodate the new field size



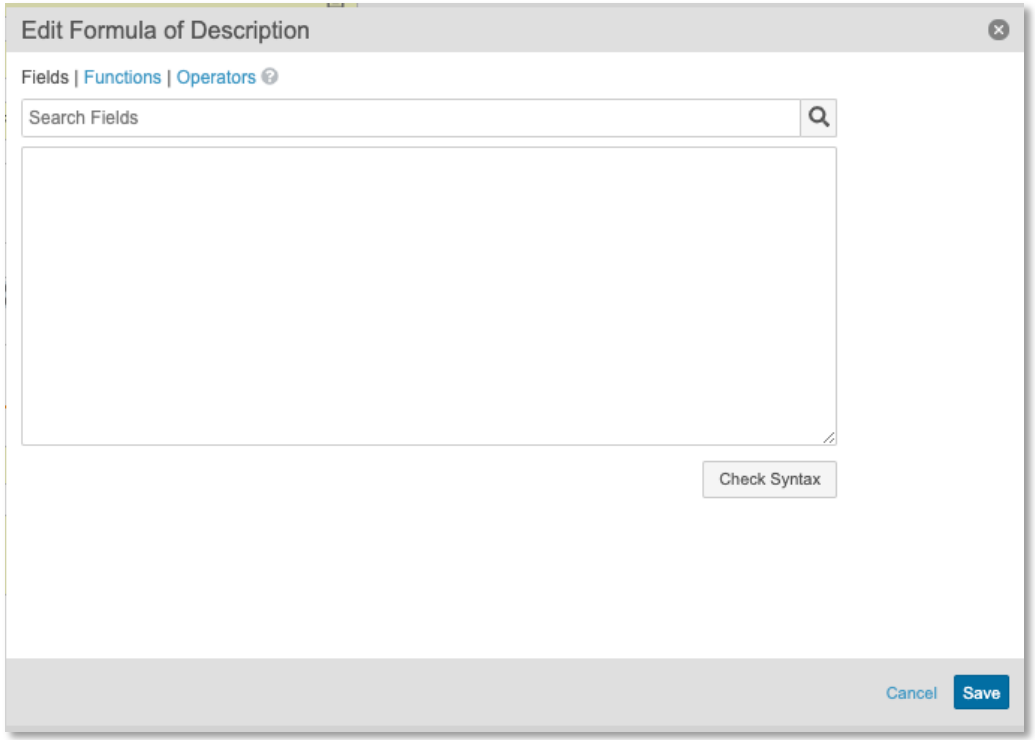
# Updates to Object Workflow & Lifecycle Formula UI

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

Previous

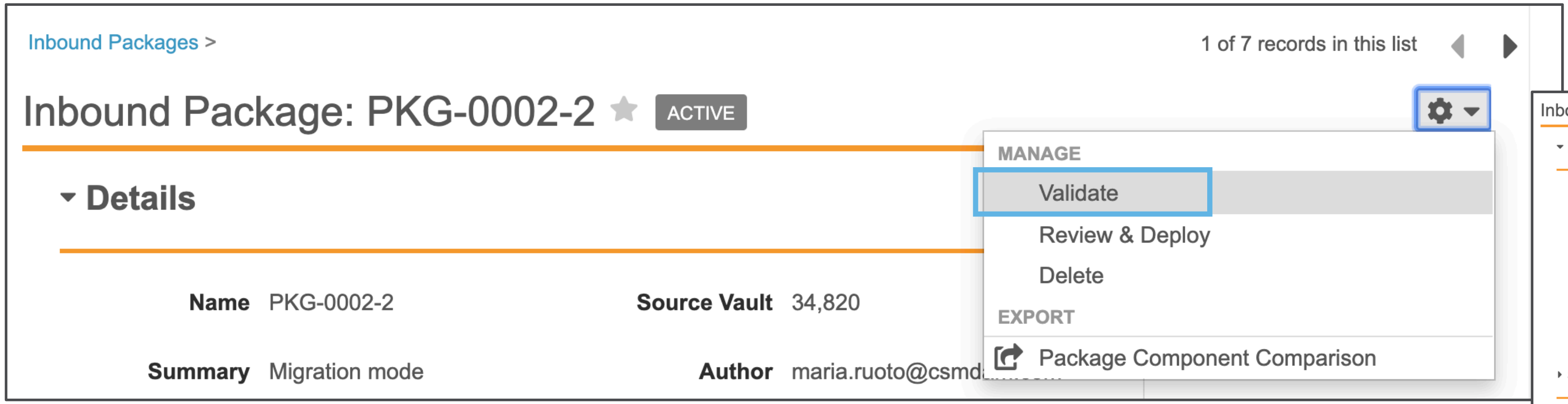


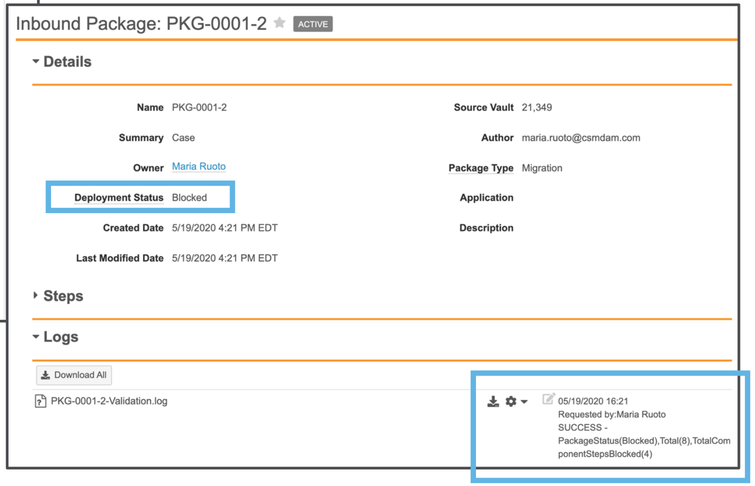

New



# VPK Deployment Order Dependency & Validation

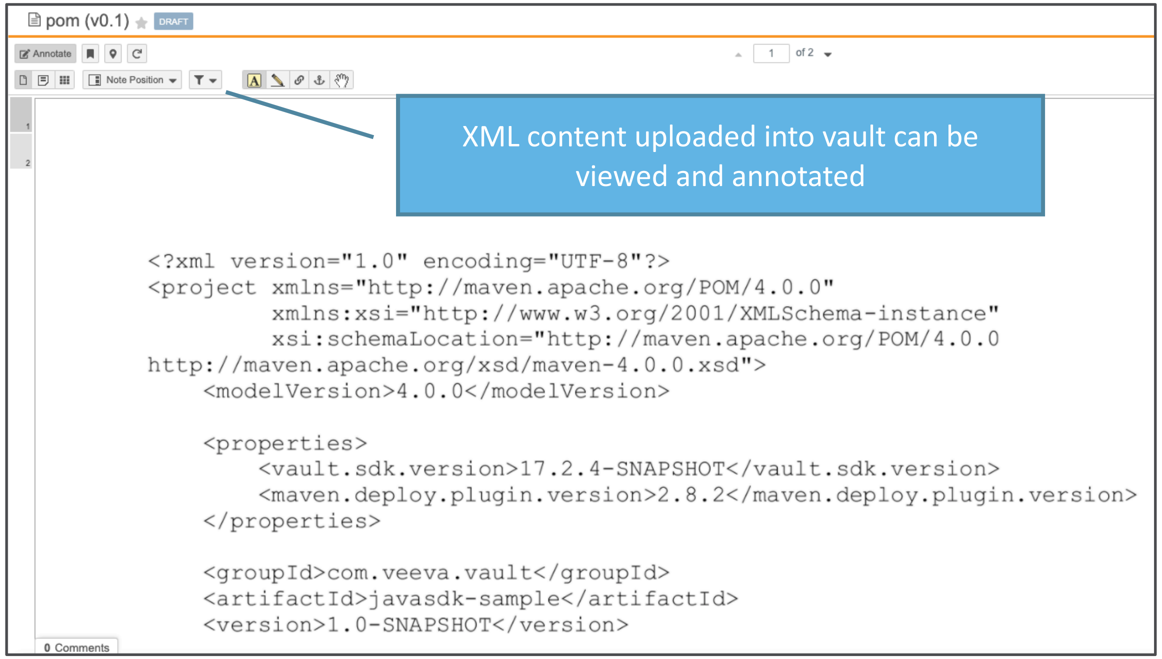
- Overview
  - The following enhancements allow Admins to validate all supported dependencies prior to deploying VPK packages
    - A validation process will automatically run that will determine if the Inbound Package has any dependencies (e.g., a picklist-type document field Audience the picklist it 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

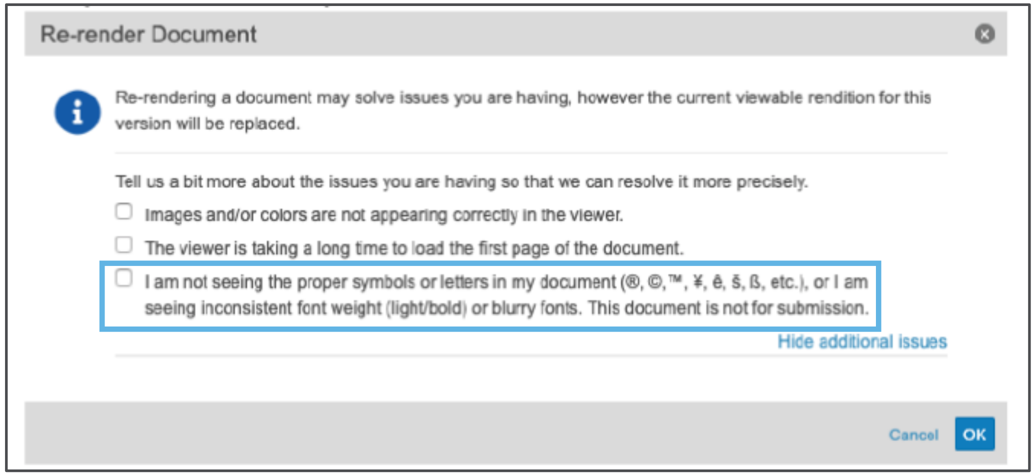


# XML Rendering

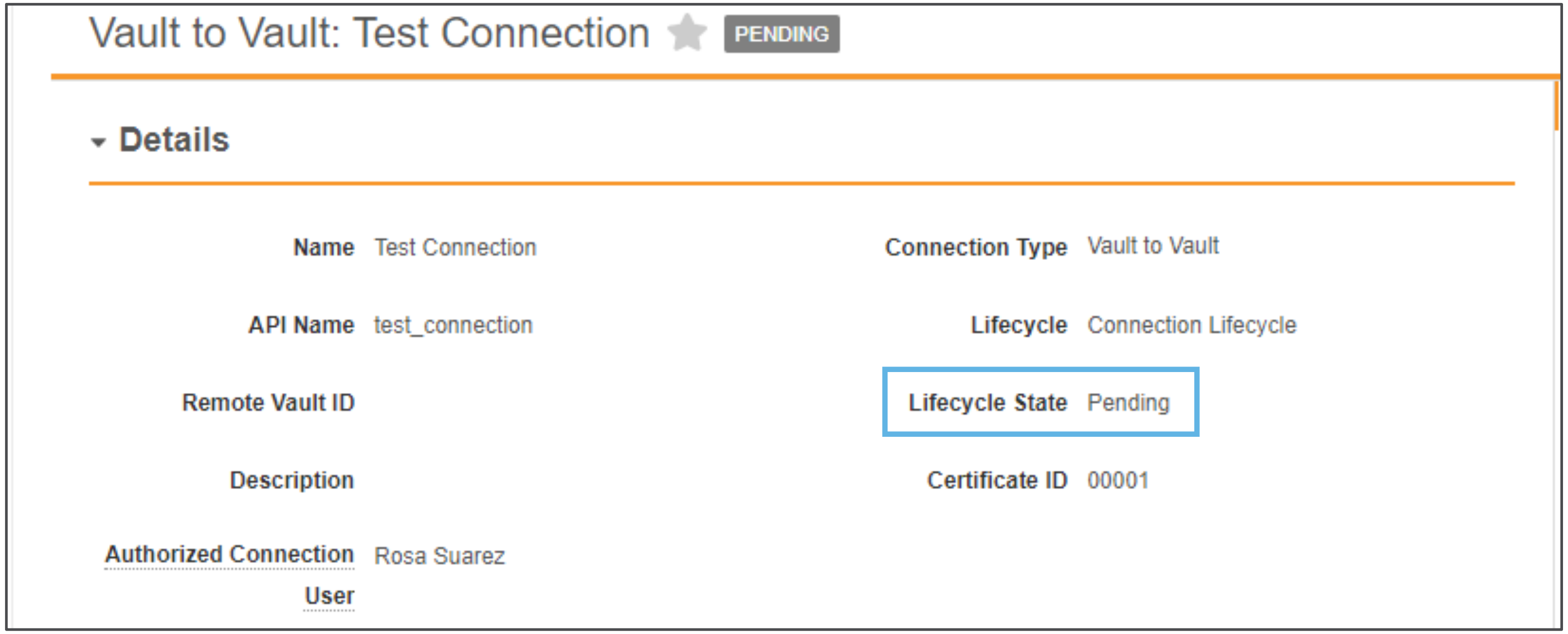
- Overview
  - This new feature provides the ability to generate a viewable rendition for XML files which can be reviewed and annotated within Vault
- Considerations
  - XML content can be uploaded through the UI or API
  - XML content can be re-rendered choosing specific options for XML content



# 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

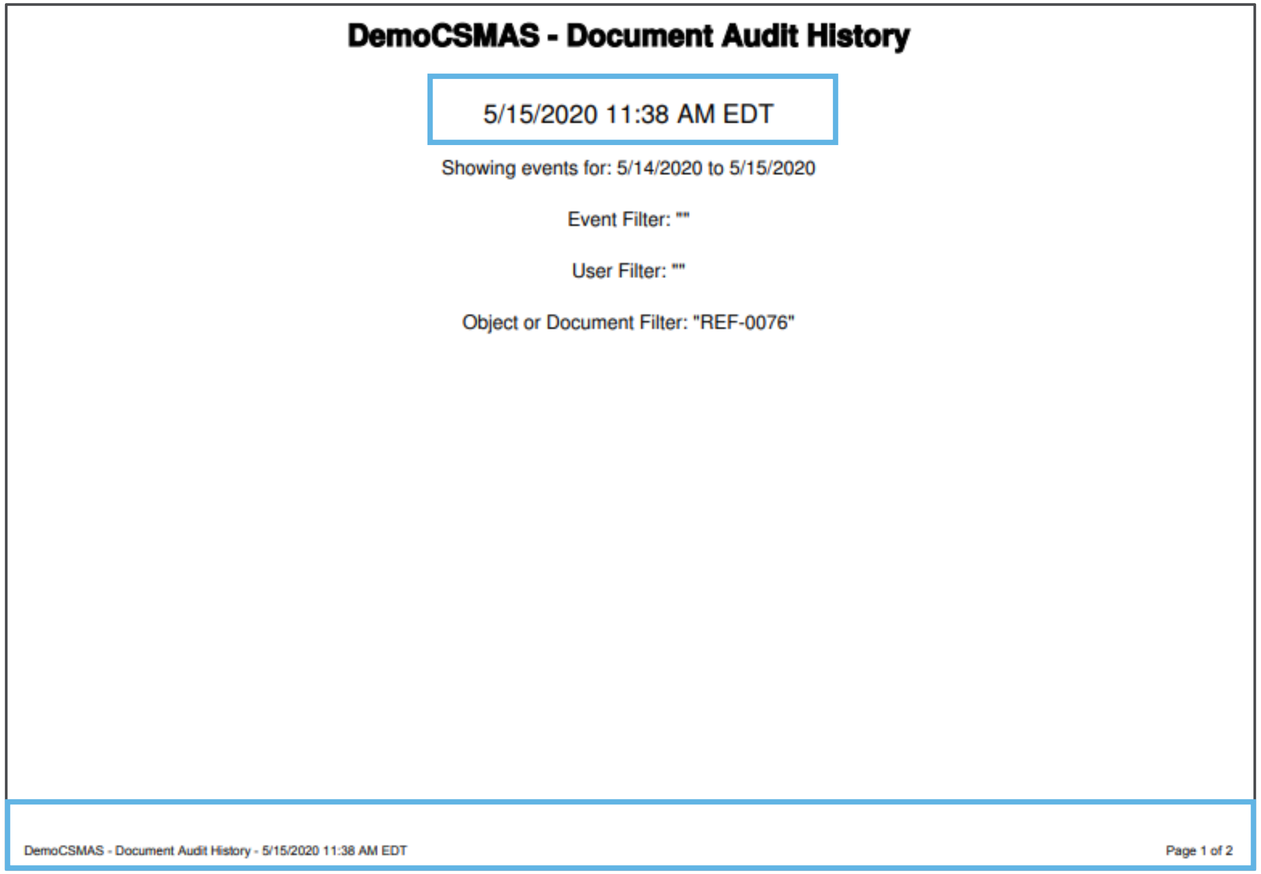


# Re-establish Vault to Vault Connection

- 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 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