

# Veeva Commercial Vault MedComms 20R3 Deep Dive

November 2020





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# Self Serve Recording Navigation

The screenshot shows a video player interface. On the left, there is a dark sidebar with the Veeva logo at the top, followed by the title "20R3 MedComms Vault Release Deep Dive". Below the title is a "CONTENT" section with a list of five items, each with a play button icon and a duration of 00:05. The first item, "01. Veeva Commercial Vault ...", is highlighted with a red bar. The main video area is orange and displays the title "Veeva Commercial Vault MedComms 20R3 Deep Dive" and the date "November 2020" above the Veeva logo. At the bottom, there is a video control bar with the BRAINSHARK logo, a menu icon, play/pause buttons, a progress bar showing 00:00 / 00:05, and a 1/96 indicator. There are also volume, settings, and full-screen icons.

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

# 20R3 Key Dates

Dates	Event
Oct 20	(PODs VV1-2, VV1-8, VV1-12 only) Pre-release vaults available
Nov 2	(all PODs) Pre-release vaults available
Nov 2-6	Validation package available on VeevaDocs <b>November 2:</b> System Release Memo <b>November 3:</b> Compliance Documents <b>November 6:</b> Executed OQs
Nov 20	Release to all limited release PODs and PODs VV1-12, VV1-1065, VV1-1069, VV1-1088 Vault File Manager does not release at this time, and instead releases with the general release PODs
Nov 11	20R3 MedComms Q&A Session <a href="https://veeva.zoom.us/webinar/register/WN_EXzZRh1cRVOHstp6ZlvHDg">https://veeva.zoom.us/webinar/register/WN_EXzZRh1cRVOHstp6ZlvHDg</a>
Nov 17	20R3 NA PromoMats Q&A Session <a href="https://veeva.zoom.us/webinar/register/WN_0gjt1ZWQT1yfJDpYLZSrGA">https://veeva.zoom.us/webinar/register/WN_0gjt1ZWQT1yfJDpYLZSrGA</a>
Nov 24	20R3 EU PromoMats Q&A Session <a href="https://veeva.zoom.us/webinar/register/WN_rNXUcdxsT468fZVoRFwgZg">https://veeva.zoom.us/webinar/register/WN_rNXUcdxsT468fZVoRFwgZg</a>
Dec 4	Release to all general release PODs





# Announcements

**3000+**

attendees from  
life sciences

**250+**

life science  
companies

Hear Latest  
Veeva  
Innovations

Get Best  
Practices

Connect &  
Collaborate

Join our European  
Community

— Veeva Commercial & Medical Europe —  
**SUMMIT ONLINE**

17 - 18 November 2020

Register Now

Commercial Excellence

Medical

Commercial Content

Data & Intelligence



# Veeva & U Community Forums

Join a Growing European Community



**142%**

increase in participants since 2017



**86**

total companies represented



Average event rating

**8.2**

out of 10



Help Your Company Drive Business Value



Hear upcoming releases, tips and tricks, and topics relevant for your roles

Good format with a mix of Veeva CRM and Vault PromoMats roadmaps, roundtables, and customer insights.

- IT LEAD



Get inspired with best practices from experts and colleagues

I loved the open discussion with peers on how we can better use Veeva. It helps me improve the adoption and usage in my own affiliate.

- COMMERCIAL EXCELLENCE



Network and meet with industry peers in your region

I liked exchanging with my peers from different companies, and networking in Italian.

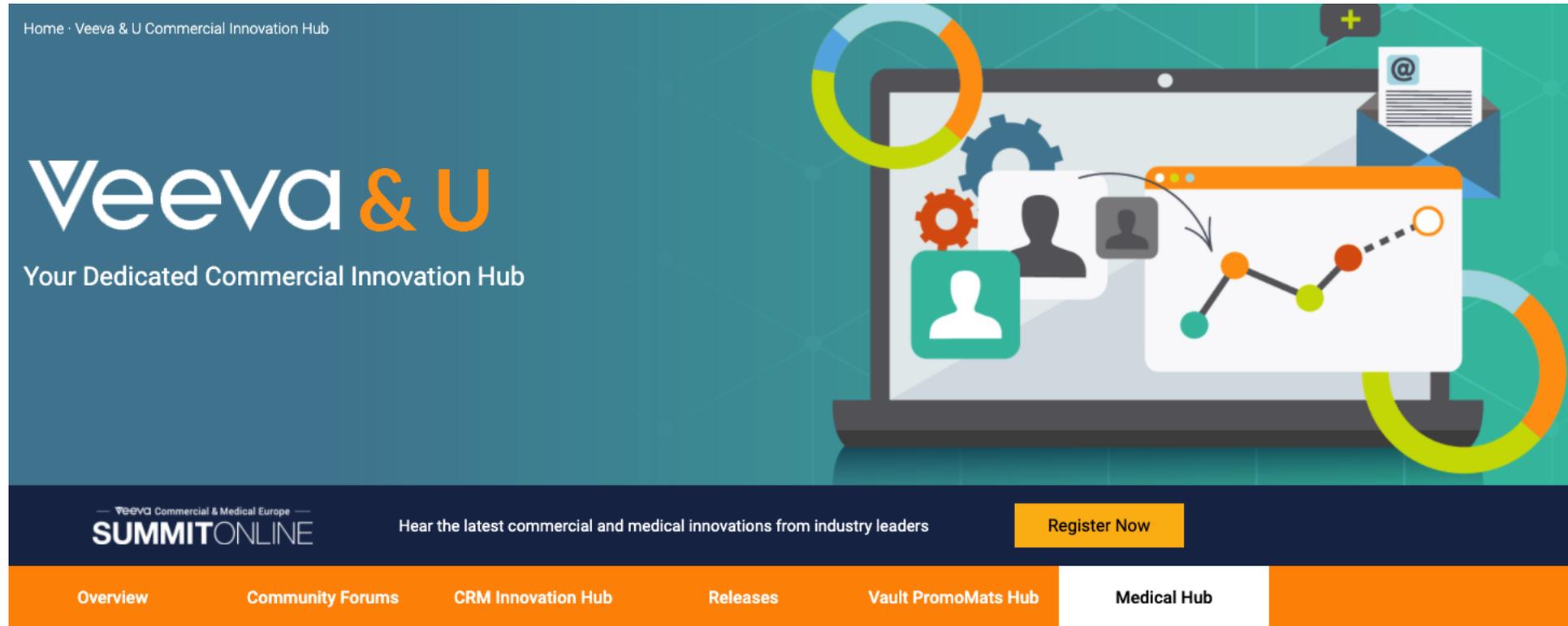
- SALES & MARKETING



Save the Date

or contact your Customer Success Manager

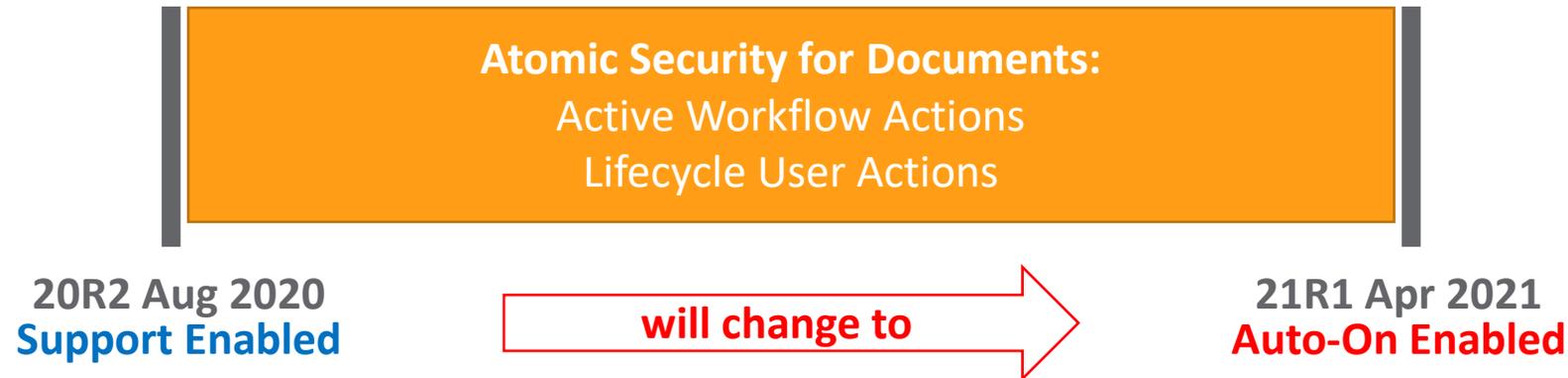
# New Medical Hub on Veeva & U



## Explore Medical Innovation in Life Sciences

Veeva Medical Cloud is a unified solution for tailored scientific engagement. Key stakeholder engagement and scientific processes come together, helping medical affairs transform organizational strategies – from product development to commercialization.

# Atomic Security for Documents: 21R1 Enablement Change



- ***Lifecycle User Actions*** (i.e. change state, start workflow, etc.) on documents will automatically migrate to Atomic Security configurations
- ***Active Workflow Actions*** (i.e. Cancel Task, Cancel Workflow, Reassign, etc.) on documents will be enabled in Atomic Security configurations
  - Customers will need to verify ***Workflow Initiators*** have a role on a document that permits them to perform *Active Workflow Actions*
- Your Customer Success Manager, Managed Services Consultant, or implementation's Project Manager will help you assess the impact

# Legend

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



Auto-On



Configuration



Vevea  
Support

# Auto On Features





# Auto On: Working with Documents

# Changes to Make a Copy for Read-Only Fields



- Overview

- Prior to 20R3 Read Only fields did not retain source document values or populate with default values when making a copy of a document. Now:
  - If 'Copy Fields' is selected, Read Only fields will retain the original document field value
  - If 'Copy Fields' is not selected, the Read Only field will populate with the default value\*

- Considerations

- Fields retain values even if Read Only to user or hidden to the user via Field Dependencies
- If fields are hidden to the user via Security Overrides they will not retain values

Agency Lead field configured to be Read Only and has a default value defined

Agency	Design Specialists
SOW #	DS-5711
Agency Lead	Jack Tripper
Agency Team	

Make a Copy

Name\* Patient Information

Reason for Copy Local to Local

Copy content (Large Size Asset not included)

Copy fields

Cancel Continue

Copy fields selected

Agency Details

Agency Design Specialists

SOW # DS-5711

Agency Lead Jack Tripper

Agency Team

Source document value retained

Make a Copy

Name\* Patient Information

Reason for Copy Local to Local

Copy content (Large Size Asset not included)

Copy fields

Cancel Continue

Copy fields NOT selected

Agency Details

Agency

SOW #

Agency Lead Chrissy Snow

Agency Team

Default value populates

\* If one has been configured by the Admin



# Participant Control Help Labels

- Overview

- Workflow initiators for Object and Multi-Document Workflows now see the label Assigned to every user or Available to any user on the participant control at the start of the workflow

- Considerations

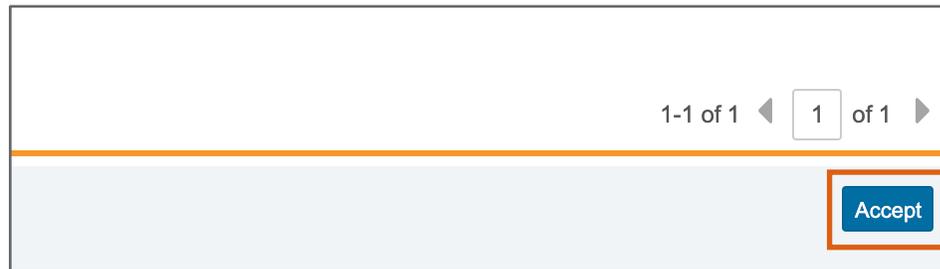
- The label that is displayed is based on whether tasks in the workflow use the Assign to all users in a participant group or Make available to users in the participant group options

The image shows two side-by-side screenshots of a 'Start' dialog box for a workflow task. The left dialog shows the 'Reviewers\*' field with three users (Jake Roberts, Maria Ruoto, Tony Tiger) and a label 'Assigned to every user' in a red box. The right dialog shows the same setup but with a label 'Available to any user' in a red box. Below these is a 'Workflow Task Options' dialog box with 'General Settings' section. It shows 'Task Label' as 'Review' and 'Assign Task To' as 'Reviewers'. Two radio button options are shown: 'Assign to all users in participant group' (unselected) and 'Make available to users in participant group' (selected). A red callout bubble points to these options with the text 'Label is dependent on how the workflow tasks are assigned'.



# Undo Acceptance of Tasks

- Overview
  - Object and Multi-Document Workflow task recipients can now undo acceptance of an optional task
- Considerations
  - This action is only available when a task is assigned to ‘any user’
  - When a user clicks ‘Undo acceptance’, the task is returned to the list of Available Tasks and will be available to everyone in the recipient list



Audit trail for New Product : New Product: MinoVox

Showing events for 3/28/2019 to 10/26/2020 (36 results)

Timestamp (M/d/yyyy)	User Name	Event Description	Record
10/26/2020 3:36 PM EDT	maria.ruoto@csmdam.com	Releasing "New Product" task "Review": "maria.ruoto@csmdam.com"	New Product : MinoVox
10/26/2020 3:36 PM EDT		"New Product" workflow "Review" task assigned to "maria.ruoto@csmdam.com"	New Product : MinoVox

‘Releasing’ represents undoing the task acceptance

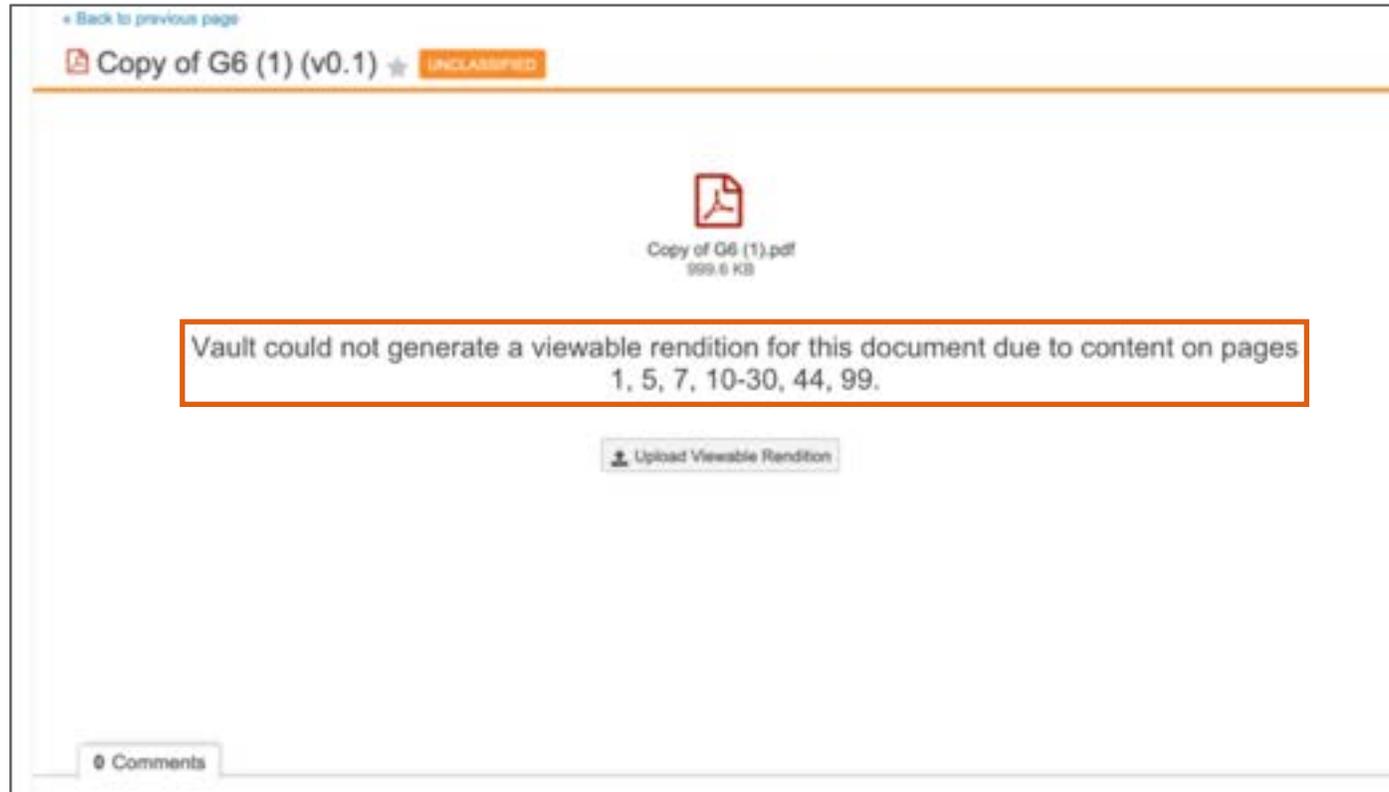
‘Task Assigned’ represents the task acceptance



# Improved Rendering Feedback

- Overview

- Vault will now detect the content in documents that is the cause of rendering failures and provide users with error messages to troubleshoot issues





# Auto On: Vault File Manager



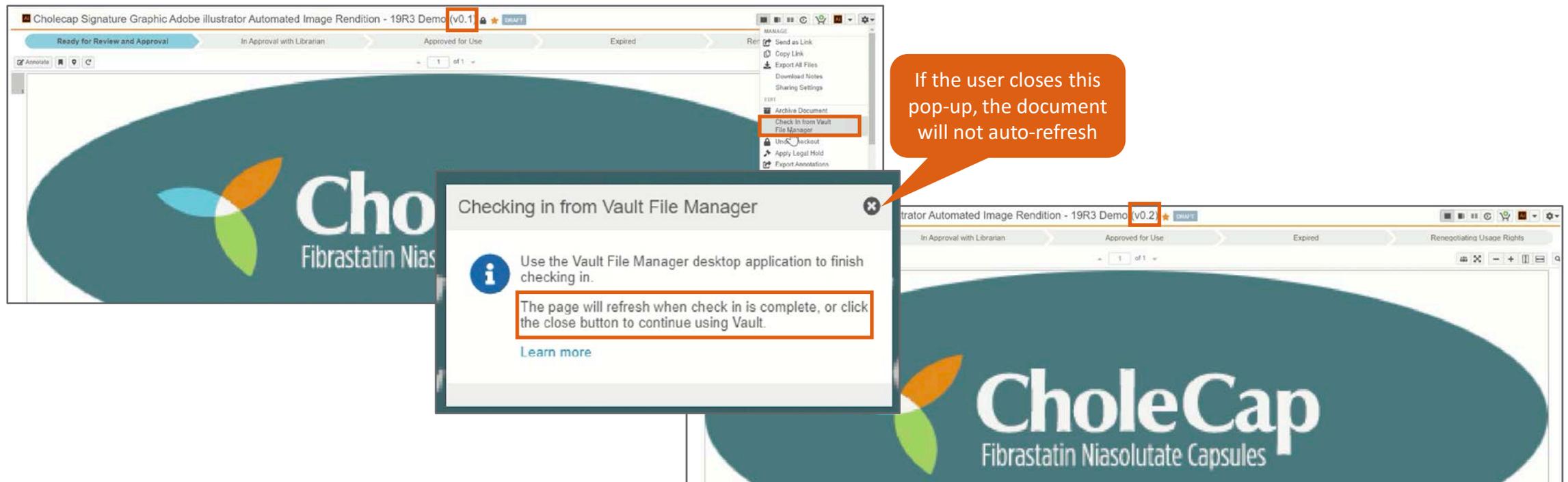
# Vault File Manager: Auto-Refresh When Checking In

- Overview

- When a user uses the Check In from Vault File Manager feature, found in the document action menu, Vault will now auto-refresh to the latest version

- Considerations

- Prior to 20R3 users had to manually refresh the document viewer to see the latest version
- If the user closes the pop-up, the document page will not auto-refresh





# Vault File Manager: Auto-Refresh When Checking In



AI Cholecap Signature Graphic Adobe Illustrator Automated Image Rendition - 19R3 Demo (v0.1) DRAFT

Ready for Review and Approval | In Approval with Librarian | Approved for Use | Expired | Renegotiating Usage Rights

Annotate

1 of 1

CholeCap  
Fibrastatin Niasoluate Capsules



Auto-On: Reporting



# Reporting: Combine Dashboards Prompts

- Overview

- Dashboard prompts that reference the same Object and use the same Operator will only need to be selected once

Medical Inquiry: Cases by Priority and Status (Country Input) Cancel Run Save

▼ PROPERTIES  
Report Type Case with Case Contact

▶ FORMULA FIELDS

▶ CONDITIONAL FIELDS

▼ FILTERS

Case > Contact Country in

Case

Name	Status
Case > Case Priority	
Case > Lifecycle State	

▶ ADVANCED OPTIONS

Medical Inquiry: Cases by Case Contact (Country input) Cancel Run Save

▼ PROPERTIES  
Report Type Case with Case Contact

▶ FORMULA FIELDS

▶ CONDITIONAL FIELDS

▼ FILTERS

Case > Contact Country in  Prompt

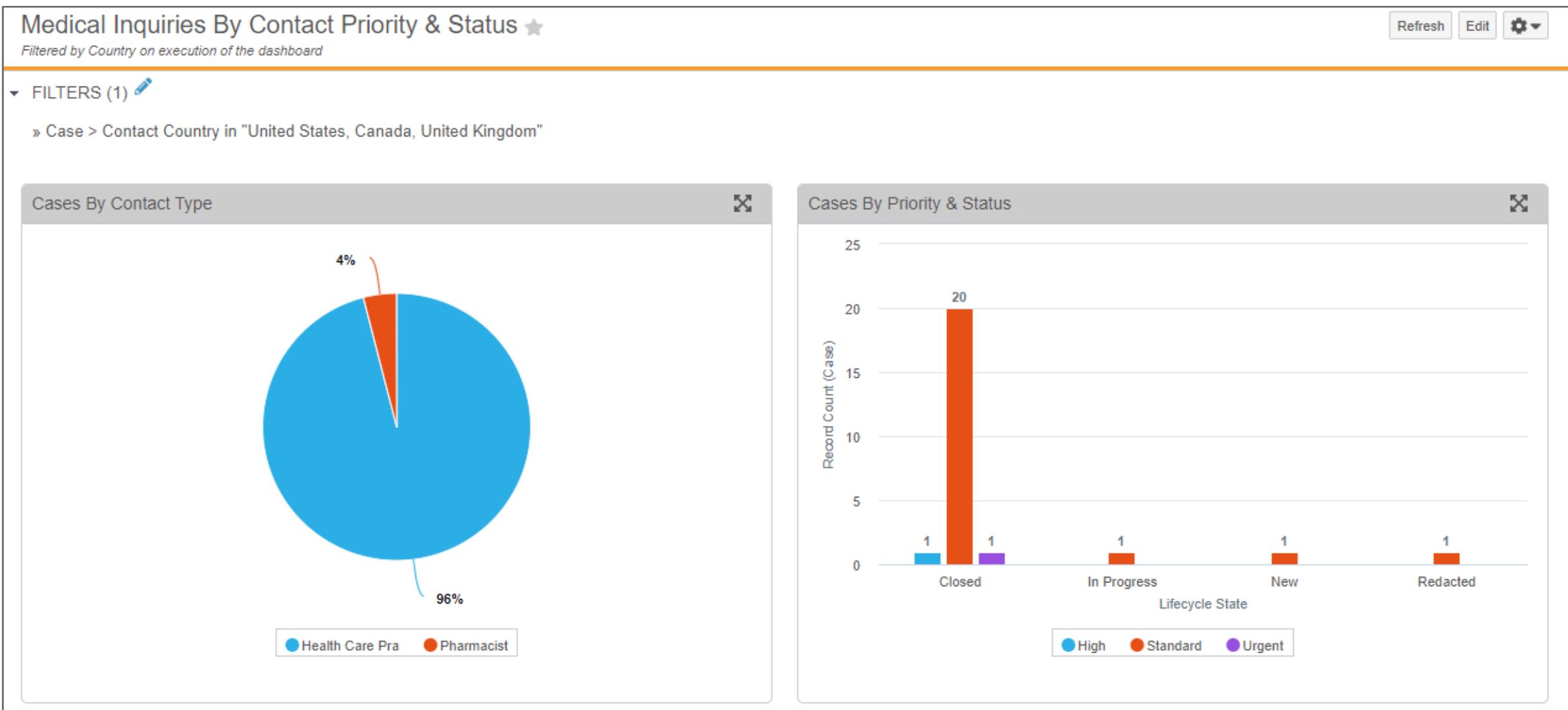
Case

Name	Status	Case Contact	Orig
Person > Contact Type			
Case > Case Contact			
Case Contact (A-Z)			

▶ ADVANCED OPTIONS

Same object and operator used in two reports

# Reporting: Combine Dashboards Prompts





# Demo

## Reporting Demo: Part 1



# Reporting: Support Is Latest Version in Matched Document & Relationship Reports

- Overview
  - Matched Document and Document Relationship Reports now support the 'Is Latest Version' field
- Use Case
  - This field is often used to understand whether a document has been superseded
- Where to Find
  - Reports > [Create or Edit Matched Document or Document Relationship Report] > Edit Columns

# Reporting: Support Is Latest Version in Matched Document & Relationship Reports



Scientific Engagement & Report Reference ★  
*Used to ascertain if the reference is the latest version or not.*

Refresh Edit ⚙️

PROPERTIES  
 Report Type Scientific Engagement Content with Reference Document

FILTERS (2)

Scientific Engagement Content (6)				Relationship (16)	Reference Document (16)			
Document Name	Document Number	Product	Country	Type	Document Name	Document Number	Country	Is Latest Version
CholeCap Basic Frequently Asked Questions (v0.2)	MED-CC-ALL-0007	Cholecap	Global	Linked Documents	Cholecap Prescribing Information (PI) (v0.1)	MED-CC-US-0033	Global	Yes
				Linked Documents	Cholecap Prescribing Information (PI) (v0.1)	MED-CC-US-0033	Global	Yes
				Linked Documents	Cholecap Prescribing Information (PI) (v0.1)	MED-CC-US-0033	Global	Yes
				Linked Documents	Cholecap Prescribing Information (PI) (v0.1)	MED-CC-US-0033	Global	Yes
Krauss Beyond LDL Cholesterol (v1.0)	MED-CC-ALL-0014	Cholecap	Global	Linked Documents	AHA Guideline on Treatment of Cholesterol (v0.1)	MED-CC-US-0006	United States	Yes
				Linked Documents	Role of CholeCap (veevastatin) in Dyslipidemia- A Clinical Study (v1.0)	MED-CC-US-0018	Global	Yes
				Linked Documents	Role of CholeCap (veevastatin) in Dyslipidemia- A Clinical Study (v1.0)	MED-CC-US-0018	Global	Yes
				Linked Documents	Role of CholeCap (veevastatin) in Dyslipidemia- A Clinical Study (v1.0)	MED-CC-US-0018	Global	Yes
Krauss Beyond LDL Cholesterol - Spain (v0.1)	MED-CC-ES-0009	Cholecap	Spain	Linked Documents	AHA Guideline on Treatment of Cholesterol (v0.1)	MED-CC-US-0006	United States	Yes
				Linked Documents	Role of CholeCap (veevastatin) in Dyslipidemia- A Clinical Study (v1.0)	MED-CC-US-0018	Global	Yes
				Linked Documents	Role of CholeCap (veevastatin) in Dyslipidemia- A Clinical Study (v1.0)	MED-CC-US-0018	Global	Yes
NATEVBA Field Resource (v1.0)	MED-NAT-ALL-0004	Natevba	Global	Linked Documents	NATEVBA_Prescribing Information (v1.0)	MED-NAT-ALL-0001	Global	No
Safety and efficacy of voderal versus oral morphine for the treatment of post-operative pain followi (v0.1)	MED-VOD-ALL-0004	Voderal	Global	Linked Documents	Anti-TNF Long Term Safety Study (v0.1)	MED-VOD-US-0013	United States	Yes
The Liver MSL Training (v0.3)	MED-CC-US-0012	Cholecap	United States	Linked Documents	Mayo Clinic Liver Report (v0.1)	MED-NP-ALL-0014	Global	Yes
				Linked Documents	Mayo Clinic Liver Report (v0.1)	MED-NP-ALL-0014	Global	Yes

Reference is no longer latest version





# Reporting: Object Formula Fields in Reports

- Overview

- This feature allows users to define formula fields directly in their object reports if they have the ability to create and edit reports

The screenshot illustrates the configuration of a formula field for a report. On the left, a report titled "How long has this case been open for" is shown with its "FORMULA FIELDS" section expanded. A red box highlights the label "How long has the case been open for?". An arrow points from this label to the "Formula Field for [How long has this case been open for?]" configuration window. In this window, the "Object" is set to "Case", the "Label" is "How long has the case been open for?", the "Return Type" is "Number", and the "Decimal places" are set to "0". The "Formula Expression" is defined as "Today() - case\_\_v.opened\_date\_\_v".

On the right, the report preview shows a table with 16 rows. A red box highlights the column "How long has the case been open for?". The table data is as follows:

Name	How long has the case been open for?	Case Contact	Contact Country
CASE-000005	261	Cheryl Ackerman	France
CASE-000016	173	Sabrina Schimdt	Germany
CASE-000053	14	Jeremy Blaydes	United Kingdom
CASE-000057	224	Sabrina Schimdt	Germany
CASE-000060	174	James Porter	United States
CASE-000079	117	Sabrina Schimdt	Germany
CASE-000089	7	Sabrina Schimdt	Germany
CASE-000090	7	Sabrina Schimdt	Germany
CASE-000091	7	Sabrina Schimdt	Germany
CASE-000092	7	Sabrina Schimdt	Germany
CASE-000093	5	Geoff Peters	
CASE-000094	1	Geoff Peters	
CASE-000096	1	Geoff Peters	
CASE-000103	1	Geoff Peters	
CASE-000104	1	Geoff Peters	
CASE-000105	0	Sabrina Schimdt	Germany

# Reporting: Object Formula Fields in Reports



- Overview Continued

- Examples:

- Calculating the difference between or comparing dates
      - `capa_action__qdm.date_closed__qdm - capa_action__qdm.created_date__v`
      - `Today("user") >= capa_action__qdm.due_date__qdm`
    - Simulating a contains operator
      - `Find("123", capa_action__qdm.risk_analysis__c) > 0`
    - Reformatting and changing data types
      - `Round(lots_of_decimals__c, 2)`
      - `Left(complete__v, length(complete__v) - 1)`
      - `Text(date__c, "MM/DD/YY")`

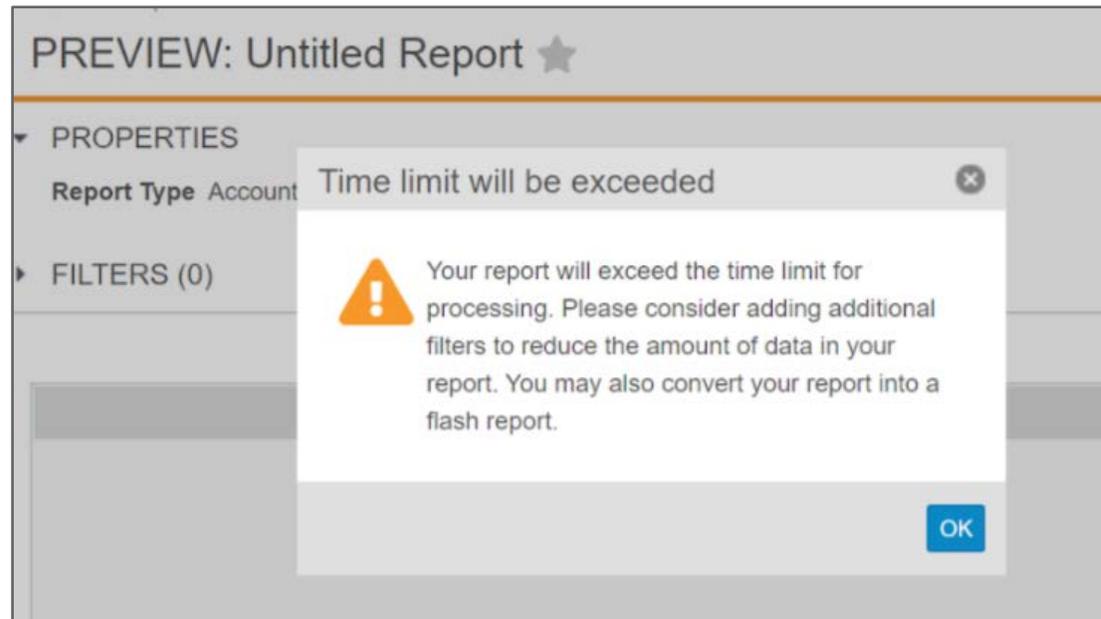
- Considerations

- Only supported for object reports initially
  - Multi-pass report types, matrix reports, and EDL Item report are not supported
  - Conditional fields are not supported

# Reporting: Early Timeout Detection for Reports



- Overview
  - This feature allows Vault to predict if a single entity report will time out
  - If Vault determines that a report will time out, the system displays an error message advising the user to add filters or schedule a flash report
- Considerations
  - Reports are set to time out after 30 minutes





# Decrease Maximum Size for Flash Report Emails

- Overview

- This enhancement reduces the default maximum email size from 9 MB to 3 MB for flash reports in order to avoid potential email distribution issues
- The Flash Report will indicate that part of the report is not included
- The complete flash report can be viewed by clicking the report link in the email

Flash Report: Activity Flash Report ran at 10/15/2020 12:00 AM PDT [Vault Emails x](#)

**Veeva Vault**  
to me ▾

---

**Veeva Vault** | ⚡ Flash Report

The Flash Report: [Activity Flash Report](#) is ready for viewing.

Ran as: Graham Gelwicks  
Ran at: 10/15/2020 12:00 AM PDT  
Activity count: 1103

**Part of this flash report is not included due to limits on email size.**

**Activity (1103)**

Name	Activity Count	Activity Type	Assigned	Assigned To
Approval		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>
Approve		1 Workflow Task	Yes	<a href="#">System</a>



# Demo

## Reporting Demo: Part 2



# Configuration: Medical Inquiry Changes

# Case Response Email Body Rendering



- Overview

- Emails are now displayed as they appear to the recipient
- Can still see the HTML source if required

- Considerations

- This feature is enabled with an API call – contact you Managed Services Team to deliver this change
- Note the response package link in the email will not take you to the response package by design
  - Disabled to ensure Security is preserved
  - Click on the response package link below the email



# Case Response Email Body Rendering

**Message Body**

Dear Geoff Peters,

Thank you for your recent inquiry. Your case ID is "CASE-000102".

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

Click the following link to view your response package: [Response Package](#)

If there is additional information you would like to have regarding our products, please do not hesitate to contact us. We will be most happy to be of assistance. Again, thank you very much for giving us the opportunity to provide you the information that you are looking for.

Sincerely,

**Verteo Medical Information Team**  
T: +123456789

This email and the information it contains are intended for the intended recipient only, are confidential and may be privileged information exempt from disclosure by law. If you have received this email in error, please notify us immediately by reply email and delete this message from your computer. Please do not retain, copy or distribute this email.

**Response Link URL** [https://eusc2-demo-gjp.veevavault.com/ui/approved\\_viewer?token=58136-397610d1-2541-4f78-8a02-bb5145cb0e92](https://eusc2-demo-gjp.veevavault.com/ui/approved_viewer?token=58136-397610d1-2541-4f78-8a02-bb5145cb0e92)

Toggle switches allow you to view the HTML if required

Click here to view the response package



# Enhancements to Medical Inquiry Case Response Email Capabilities



- Overview

- Enhancements have been made to MedComms Medical Inquiry Case Response Email functionality:

- Define one or more centralized email addresses that can be set as the *Reply To* field

- Use Case

- Means you can create dedicated centralized email inboxes for each country

- Considerations

- Admin > Settings > Application Settings > Medical Inquiry Section > Enable “Reply To” with Email Responses

# Enhancements to Medical Inquiry Case Response Email Capabilities



Email Response: CASE-000102-RESPONSE-001 ★ RESPONSE SENT Edit ⚙️

Case Details

- Fulfillment Documents (1)**
- Response Package
- CC/BCC (1)
- Internal Response Notes
- Case Response Sent Emails (1)
- Workflow Timeline
- System Information

Sharing Settings

**Response Package**

Cover Letter

Allow Document Download

Link Expires In (Number of Days)

Reply To [Verteo Biopharma Medical Inquiry](#)

Response Document Link

**CC/BCC**

+ Create  🔍 Show in Tab 1-1 of 1 ⚙️

Name	Additional Recipient	Case Resp...	Recipient Type	Person Email
<a href="#">CASE-RESPONSE-RECIPIE...</a>	Larry Lakes	Colleague	BCC	<a href="mailto:larry.lakes@verteobiopharma.com">larry.lakes@verteobiopharma.com</a>

Specify Reply To Centralized Address





# Demo

## Medical Information Updates: Part 1

# Enhancements to Medical Inquiry Case Response Email Capabilities



- Overview
  - Add CC and BCC recipients
- Use Case
  - Often Medical Inquiries are raised to MSL's by Healthcare Professionals
  - Med Info Team handles responses & needs to copy MSL on the response
  - Doctors often request that Assistants are copied on responses to Inquiries
- Considerations
  - You need to be using the "Enable Email Tracking" feature to use this
- Configuration
  - More information can be found [here](#)
  - Contact your Managed Services representatives for help in setting this up

# Enhancements to Medical Inquiry Case Response Email Capabilities



Email Response: CASE-000102-RESPONSE-001 ★ RESPONSE SENT Edit ⚙️

Case Details

**Fulfillment Documents (1)**

Response Package

CC/BCC (1)

Internal Response Notes

Case Response Sent Emails (1)

Workflow Timeline

System Information

Sharing Settings

**Response Package**

Cover Letter

Allow Document Download

Link Expires In (Number of Days)

Reply To [Verteobiopharma Medical Inquiry](#)

Response Document Link

**CC/BCC**

+ Create  🔍 Show in Tab 1-1 of 1 ⚙️

Name	Additional Recipient	Case Resp...	Recipient Type	Person Email
<a href="#">CASE-RESPONSE-RECIPIE...</a>	Larry Lakes	Colleague	BCC	<a href="mailto:larry.lakes@verteobiopharma.com">larry.lakes@verteobiopharma.com</a>

BCC and CC email recipients



# Enhancements to Medical Inquiry Case Response Email Capabilities



- Overview
  - Administrators can remove the Vault header and footer from all emails
- Use Case
  - Customers prefer to use their own header and footer
  - Remove the general Vault header and footer
- Considerations
  - Admin > Settings > Application Settings > Do Not Include Vault Email Header & Footer checkbox

# Enhancements to Medical Inquiry Case Response



- Overview
  - Enhanced cover letter options enable a response to a specific Case Request where you have multiple requests
- Use Case
  - You want to reply to one case request where many are present on a Case
- Consideration
  - Additional document type has been created to support this which includes additional fields you can merge in Cover Letter
- Configuration
  - For more information speak to your Managed Services contact or CSM

▼ General

<b>Name</b>	Cover Letter: CASE-000091
<b>Title</b>	
<b>Type</b>	Medical Inquiry Case Response Cover Letter
	<a href="#">Reclassify</a>
<b>Country</b>	
<b>Product</b>	<a href="#">Cholecap</a>
<b>Document Number</b>	MED-CC--0038
<b>Created By</b>	Username CSM on 21/10/2020 14:26 EDT
<b>Last Modified By</b>	Username CSM on 21/10/2020 14:26 EDT
<b>Version</b>	0.1
<b>Lifecycle</b>	Medical Inquiry Cover Letter
<b>Status</b>	Draft
<b>Tags</b>	
<b>Related Case</b>	<a href="#">CASE-000091</a>
<b>Related Case Request</b>	<a href="#">CASE-000091 &gt;</a> <a href="#">CR-000083</a>
<b>Related Case Response</b>	<a href="#">CASE-000091-RESPONSE-001</a>
<b>Lifecycle State Stage ID</b>	
<b>Lifecycle Stage</b>	
<b>Global ID</b>	58136_425
<b>Global Version ID</b>	58136_425_1240
<b>Document Link</b>	
<b>Document Version Link</b>	





# Demo

## Medical Information Updates: Part 2



Configuration: Portals



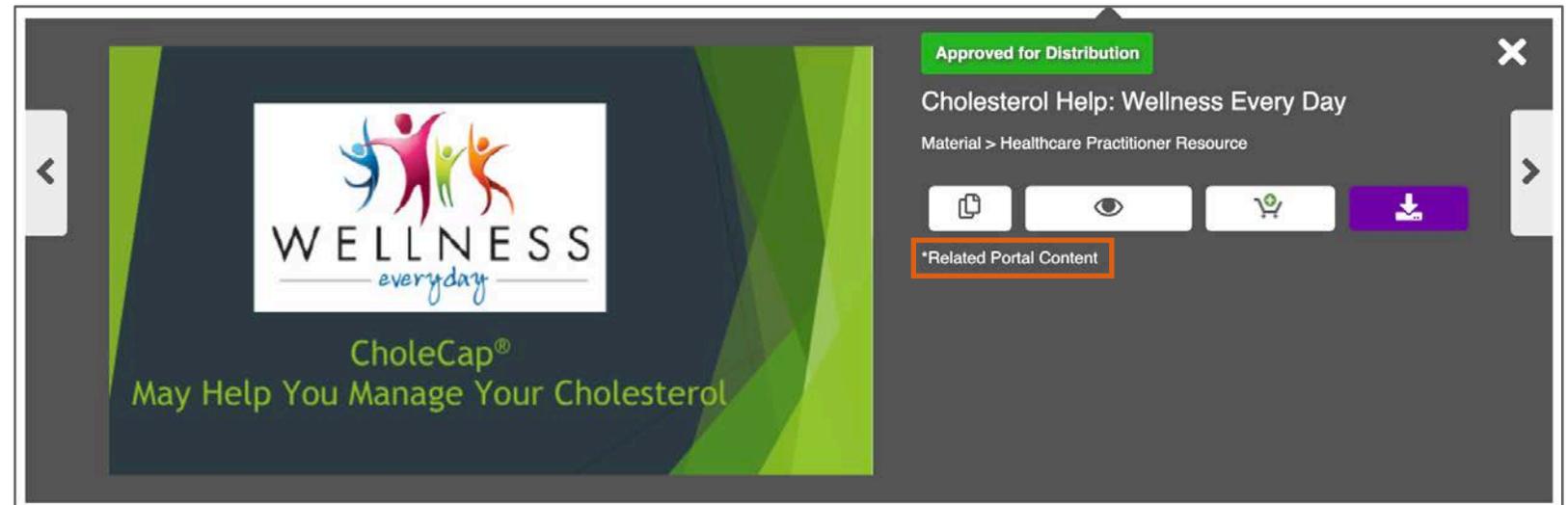
# Portals: Related Portals

- Overview

- This feature allows Portal Admins to associate multiple Portals, allowing users to filter and search results from the current and any related Portals

- Considerations

- The Related Portals widget will be inactive by default; it must be made active by a Portal Admin
- The Related Portals relationship is not reciprocal
- Content from related Portals is marked as ‘\*Related Portal Content’
- You can add up to 12 Related Portals





# Portals: Related Portals

- Configuration

- [Portal] > Edit Portal > Make Active > Save > Related Portals > Add Portal

Related Portals Display Max: 7 Inactive

undefined

CholeCap

This section will be auto populated.

Most Viewed

Most Popular

Recently Added

Related Portals

← Add

Add Portal

Use search bar to find an item, and then use the table below to make selection

Start typing to see options...

Filters

Start typing to see options...

Clear Selection Displaying 1-2 of 2

Portal Name	Status	Description
<input checked="" type="radio"/> Animal Health	Active	Animal Health across ...
<input type="radio"/> Cholecap	Active	Cholecap is our new ...

Cancel Add

Related Portals

Animal Health

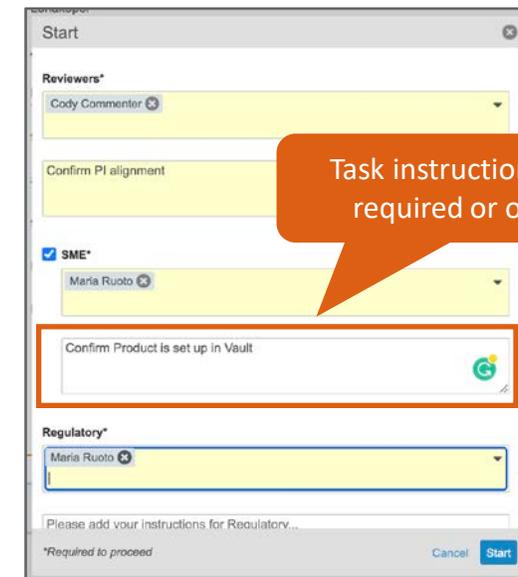


# Configuration: Object & Multi-Document Workflows



# Ad Hoc Task Instructions

- Overview
  - Ad hoc task instructions are now supported for Object and Multi-Document Workflow emails and notifications
- Considerations
  - Ad hoc task instructions can be configured to be optional or required
  - Task instructions are entered by the workflow initiator in the workflow start dialog
  - The workflow initiator can provide a different set of instructions to each participant group
  - The Ad hoc task instructions ‘`{taskInstructionsByInitiator}`’ token must be added to the appropriate templates





# Ad Hoc Task Instructions

- Use Case
  - Workflow initiators can provide additional instructions to each user group
- Configuration
  - *Start Step*: Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > Start > Edit > Add Control
  - *Object Message*: Admin > Configuration > Object Messages > [Object Message] > Edit

**Start Options** ?

Control 1 Participants

Participant Label\* Ad Hoc Review

Add Participants\*  Allow workflow initiator to select participants

Roles allowed to participate Owner x Viewer x

Roles not allowed to participate Reviewer x

Allow task instructions for these participants

Required

To make Task Instructions mandatory check "Required"

**Object Messages** > Task Assigned ?

Details

Label Task Assigned

Name task\_assigned\_c

Status Active

Object All objects

Source Custom

Description

Message Text

Subject \${Object.state\_\_v} - \${taskName} (due: \${taskDueDate})

Notification Text You have been assigned the task "\${taskName}" for the object: "\${Object.name\_\_v}" (State: \${Object.state\_\_v}). <b>\${taskInstructionsByInitiator}</b> <br> Perform your task, then click Complete to proceed.

Email Body <p>\${recipientName}</p> You have been assigned the task "\${taskName}" for the object: "\${Object.name\_\_v}" (State: \${Object.state\_\_v}). <br> Perform your task, then click Complete to proceed.</p> <p><b>Special Instructions: <b>\${taskInstructionsByInitiator}</b></b></p> <p><b>Vault: </b>\${vaultName} <br><b>Object: </b>\${Object.name\_\_v} <br><b>State: </b>\${Object.state\_\_v}</p> <p>\${taskName}</p> <p>\${taskDueDate}</p> <p>Link to the My Tasks page: \${taskHome} for the "\${Object.name\_\_v}" object.</p> <p>\${taskVerdicts}</p> <p>Access your Vault here: <a href=\${uiBaseExtUrl}>\${vaultName}</a></p> <p>Workflow Owner Email Name: \${workflowInitiatorEmail}</p>



# Default Users from Sharing Settings

- Overview

- Admins can now configure Object and Multi-Document Workflows to auto-populate users and groups at the workflow start step based on their roles
  - For example, if the Reviewer and Owner roles are allowed to participate in the Review Task, users assigned those roles in the Sharing Settings will be auto-populated at the start step

- Considerations

- Workflow initiators can manually remove users if necessary

Name	Role	Sharing Rules	Access
Darryl Dixon	Viewer		Manual Assignment
Jake Roberts	Reviewer		Manual Assignment
Maria Ruoto	Owner		Manual Assignment
Tony Tiger	Reviewer		Manual Assignment

Add Participants\*  Allow workflow initiator to select participants

Roles allowed to participate: Owner, Reviewer

Workflow Participant Control

Reviewers\* Assigned to every user

Jake Roberts, Maria Ruoto, Tony Tiger

Please add your instructions for Review

SME

\*Required to proceed Cancel Start

Reviewers are auto-populated based on Sharing Settings and Workflow Participant Control



# Default Users from Sharing Settings

- Configuration

- Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > [Workflow Start Step] > Edit > Default users from sharing settings

Start Options ? Object Workflow

Control 1 Participants

Participant Label\* Reviewers

Add Participants\*  Allow workflow initiator to select participants

Roles allowed to participate Owner Reviewer

Roles not allowed to participate

Allow task instructions for these participants

Required

**Default users from sharing settings**

Use roles as participants

Use custom action to define participants

Start Options ? MDW Workflow

Control 1 Participants

Participant Label\* Medical Reviewers

Roles allowed to participate Reviewer

Allow task instructions for these participants

**Default users from sharing settings**



# Update Sharing Settings in Task Step

- Overview

- Users can now be automatically added to or removed from Object or Document task roles sharing settings based on task events (task assignment, cancellation, or completion)

- Considerations

- Multiple roles can be added to a single task step and multiple roles can be added to a single rule
- The role must exist on the relevant Lifecycle
- If the workflow is cancelled the sharing settings do not revert

The image shows two screenshots of the Veeva CRM interface. The top screenshot, labeled 'Before Task Assignment', shows the 'Sharing Settings' page with a table containing one entry: Maria Ruoto, Owner, Manual Assignment. The bottom screenshot, labeled 'After Task Assignment', shows the same page but with an additional entry: Cody Commenter, Reviewer, Manual Assignment. An orange callout bubble points to the 'Reviewers' field in the task step configuration, stating 'Workflow initiator selects Reviewers'. Another orange callout bubble points to the new 'Cody Commenter' entry in the table, stating 'Selected users have been added to the Reviewer Role'.

**Before Task Assignment**

Name	Role	Sharing Rules	Access
Maria Ruoto	Owner		Manual Assignment

**After Task Assignment**

Name	Role	Sharing Rules	Access
Cody Commenter	Reviewer		Manual Assignment
Maria Ruoto	Owner		Manual Assignment
Merle Dixon	Reviewer		Manual Assignment



# Update Sharing Settings in Task Step

- Configuration

- Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > [Workflow Task] > Edit > [Update Sharing Settings or Update Document Sharing Settings]

Multi-Document Workflow

Multi-document Workflows > General > Send for MLR Review

**Document Task Options**

**General Settings**

Task Label\* MLR Review

Assign Task To\* Workflow Initiator

Instructions\* Complete Review

Task Requirement\* Required

**Due Date**

Due Date

**Update Document Sharing Settings**

Update Role on Event Task Completion Add Viewer

Task Cancellation Add Owner

Task Assignment Add Remove Reviewer

Add rule

Click to add a rule

Click to remove a rule

Object Workflow

Object Workflows > New Product > Ad Hoc Review (if needed)

**Workflow Task Options**

**General Settings**

Task Label\* Ad Hoc Review

Assign Task To\* Reviewers

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

Instructions\* Review this document and provide comments

Task Requirement\* Required

**Due Date**

Due Date

**Update Sharing Settings**

Update Role on Event Task Assignment Add Editor Viewer

Agency  
Owner  
Reviewer

Multiple roles can be added to a single rule

# Atomic Security for Active Workflow Actions



- Overview

- Active workflow actions in object workflows can now be secured based on lifecycle state and role
- The securable actions are
  - Cancel Workflow
  - Cancel Task
  - Reassign
  - Add Participants
  - Update Task Due Date

- Considerations

- Workflow initiators will have access to these actions regardless of permission sets and Atomic Security

Example: Approver role actions while 'In Approval'

Owner role actions while 'In Approval'

# Atomic Security for Active Workflow Actions



- Configuration

- Admin > Configuration > Object Lifecycles > [State] > Atomic Security: Actions > Edit > + Rule Override

Action Label ▲	State Behavior	Approver
Add Participants	Execute	Execute
Cancel Task	Execute	Hide
Cancel Workflow	Execute	Hide
Reassign	Execute	Execute
Update Task Due Date	Execute	Hide

**Behavior Options:**  
Execute: Allows users to see and click on the action  
Hide: The action is never visible to users

# Additional Task & Workflow Initiator Tokens



- Overview

- Message Templates for Object and Multi-Document Workflows now support additional Workflow Initiators and Task tokens

- $\${objectType}$ : Object Type
- $\${recipientName}$ : Task Recipient Name
- $\${taskComments}$ : Task Comments
- $\${taskDueDate}$ : Task Due Date
- $\${taskHome}$ : Link to the My Tasks page
- $\${taskInstructionsByInitiator}$ : Instructions provided by the workflow owner
- $\${taskName}$ : Task Name
- $\${taskVerdicts}$ : Task Verdicts
- $\${workflowInitiatorEmail}$ : Workflow Owner Email Name
- $\${workflowInitiatorFirstName}$ : Workflow Owner First Name
- $\${workflowInitiatorLastName}$ : Workflow Owner Last Name
- $\${workflowInitiatorMobilePhone}$ : Workflow Owner Mobile Phone
- $\${workflowInitiatorName}$ : Workflow Owner Name
- $\${workflowInitiatorOfficePhone}$ : Workflow Owner Office Phone
- $\${workflowInitiatorTitle}$ : Workflow Owner Title

**Veeva Vault**

Maria Ruoto,

You have been assigned the task "" for the object: "**Abetol**" (State: Perform your task, then click Complete to proceed.

**Vault:** CC CSM DAM Demo Vault  
**Object:** **Abetol**  
**State:** Approved

Link to the My Tasks page: <https://csmdam-cc-csm-dam-demo.veevavault.com/ui/#home/tasks> for the "**Abetol**" object.

**Task Name:** Review  
**Task Participant:** Maria Ruoto on behalf of Cody Com  
**Verdict:** Approved  
**Additional Information:** FDA approved PI 7/2/20  
**Completion Date:** 9/6/2020 7:30 PM PDT

**Task Name:** Approved PI Distribution  
**Task Participant:** Maria Ruoto  
**Verdict:** Complete  
**Completion Date:** 9/6/2020 10:31 PM EDT

**Task Name:** Ad Hoc Review  
**Task Participant:** Maria Ruoto  
**Verdict:** Approved  
**Completion Date:** 9/6/2020 10:31 PM EDT

Access your Vault here: [CC CSM DAM Demo Vault](#)

Workflow Owner Email Name: [maria.ruoto@veeva.com](mailto:maria.ruoto@veeva.com)

Callouts in the image:  
- Link to the My Tasks page (points to the URL)  
- Task comments (points to the Additional Information)  
- Previous task verdicts (points to the Approved PI Distribution task)  
- Workflow Owner email (points to the email address)



# Additional Task & Workflow Initiator Tokens

- Configuration

- Admin > Configuration > Object Messages > [Message]
- Admin > Configuration > [Object Workflow] > [Notification Step] or [Task Step]
- Admin > Configuration > [Multi-Document Workflow] > [Notification Step] or [Task Step]

Notification Step

Task Step

To include verdicts from previous tasks check this box and select tasks to include and add the token to the relevant notification

**Email Body\***

```

<p>${recipientName},</p>
You have been assigned the task "${taskName}" for the object: "${Object.name__v}" (State: ${Object.state__v}).
<br>Perform your task, then click Complete to proceed.
</p>
<p><b>Vault: </b>${vaultName}
<br><b>Object: </b>${Object.name__v}
<br><b>State: </b>${Object.state__v}</p>
<p>${taskName}</p>
<p>${taskDueDate}</p>
<p>Link to the My Tasks page: ${taskHome} for the "${Object.name__v}" object.</p>
${taskVerdicts}
<p>Access your Vault here: <a href="${uiBaseExtUrl}">${vaultName}</a></p>
<p>Workflow Owner Email Name:
${workflowInitiatorEmail}</p>

```



Objects

# Filter by All Dates in Object Record Audit Trail



- Overview

- This enhancement adds the 'all' option back to the Timestamp filter in individual object record audit trails, allowing user to more easily view and export complete audit trails

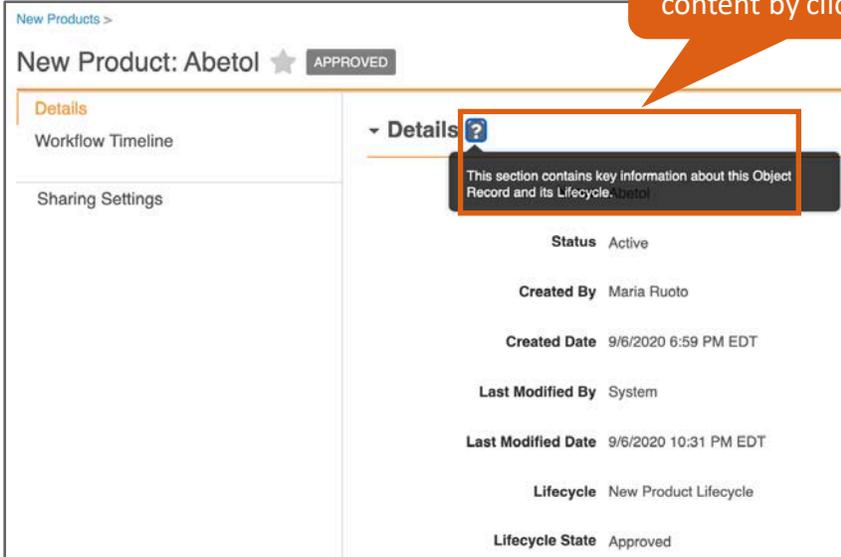
The screenshot shows the 'All Products' list on the left and the 'Audit Trail for Product : CholeCap' window on the right. In the 'All Products' list, the 'Audit Trail' option is highlighted. The 'Audit Trail' window shows a filter for 'Timestamp' set to 'all'. Below the filter, a table displays 4 audit trail results for the product 'CholeCap'.

Timestamp (M/d/yyyy)	User Name	Event Description	Record
10/6/2020 7:07 AM PDT	annie@veepharm.com	"Therapeutic Area" set to "Rheumatology"	Product : CholeCap
10/6/2020 7:06 AM PDT	annie@veepharm.com	"Generic Name" set to "chopredol"	Product : CholeCap
10/6/2020 7:06 AM PDT	annie@veepharm.com	"Product Abbreviation" set to "CC"	Product : CholeCap
10/6/2020 7:05 AM PDT	annie@veepharm.com	Product : CholeCap created	Product : CholeCap



# Section Level Help

- Overview
  - Admins can now define help content for Object Record Detail Page Sections
- Considerations
  - When users view the Object Record Page, they can see this information by clicking the ? icon on the section heading
- Configuration
  - Admin > Objects > [Object] > Page Layouts > New Product Detail Page Layout > [Add Section or  Section] > Section Help



New Products >  
New Product: Abetol ★ APPROVED

Details  
Workflow Timeline

Sharing Settings

▼ Details ?

This section contains key information about this Object Record and its Lifecycle. *abetol*

Status Active

Created By Maria Ruoto

Created Date 9/6/2020 6:59 PM EDT

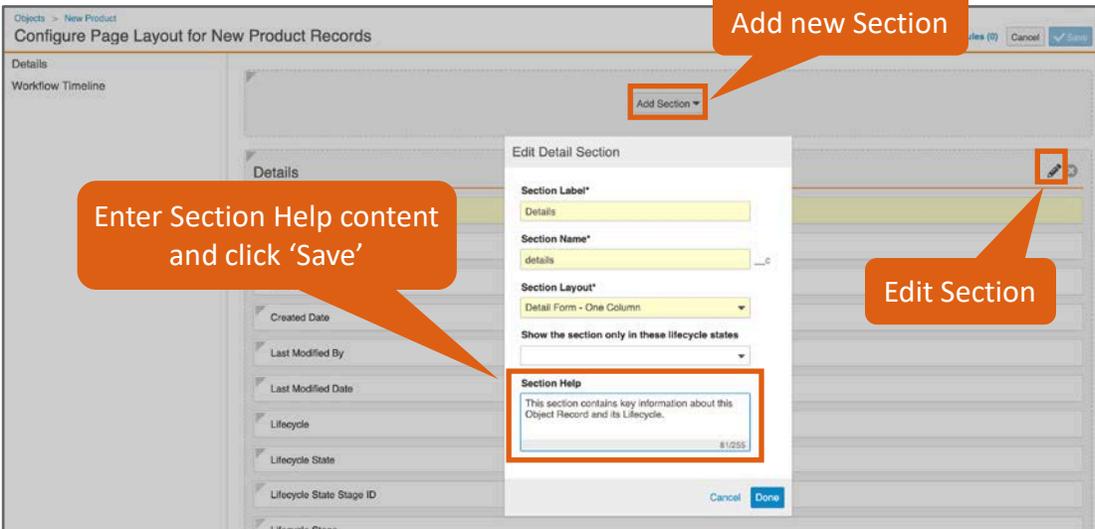
Last Modified By System

Last Modified Date 9/6/2020 10:31 PM EDT

Lifecycle New Product Lifecycle

Lifecycle State Approved

Users can access Help content by clicking the ?



Objects > New Product  
Configure Page Layout for New Product Records

Details  
Workflow Timeline

Add Section ▼

Edit Detail Section

Section Label\* Details

Section Name\* details

Section Layout\* Detail Form - One Column

Show the section only in these lifecycle states

Section Help  
This section contains key information about this Object Record and its Lifecycle.

Cancel Done

Add new Section

Enter Section Help content and click 'Save'

Edit Section



# Demo

## Section Level Help



# Audit Action Security for Objects

- Overview

- Previously the object record audit trails were either all visible or all hidden based on the application permission shared with documents that applied to all objects
- This feature allows admins to control access to the object audit trail by object, state and role via the Object Lifecycle Atomic Security actions

Action Label ▲	State Behavior
Audit Trail	Execute
Change State to Approved	Execute
Change State to In Review	Execute
Change State to Withdrawn	Execute
Start Claim Review and Approval	Execute

- Considerations

- This feature requires enablement within the object configuration detail options
- This feature does not apply to documents



# Audit Action Security for Objects

- Configuration

- Admin > Configuration > Objects > {Object} > Details Tab > Edit Object > Options > Action Security

The screenshot shows the configuration page for an object named 'Claim'. The page is divided into three sections: Details, Configuration, and Options. The 'Action Security' checkbox is highlighted with a red box.

**Details**

- Object Label\*: Claim
- Object Plural Label\*: Claims
- Object Name: annotation\_keywords\_\_sys
- Source: System
- Object Class: Base
- Data Store: Standard
- Description: (empty text area)

**Configuration**

- Model: This object is an independent entity.
- Unique Keys: (Name), (Global ID), (Create From Annotation ID)

**Options**

- Display in Business Admin menu
- Allow attachments
- Enable Signatures
- Audit data changes in this object
- Enable Object Types
- Dynamic Access Control
  - Enable Custom Sharing Rules
  - Enable Matching Sharing Rules
- Action Security**  Use Action security to control Audit Trail
- Lifecycle: Claims Lifecycle
- Help Content: (empty text area)
- Created By: System



# Default by Object Type

- Overview

- Admins are now able to define field default values at the Object Type level
- This feature also allows you to override the Field Default values defined at the base object level

The screenshot shows the 'Create Asset Request' form. A callout box labeled 'Base Object level field value default' points to the 'Urgency' dropdown menu, which is currently set to 'Normal'. The 'Asset Request Type' is 'Base Asset Request'. Other fields include 'Asset\*', 'Version\*', 'Request Due Date', and 'Request Approval Date'. Buttons for 'Cancel', 'Save + Create', and 'Save' are visible at the bottom.

The screenshot shows the 'Create Reinstatement' form. A callout box labeled 'Object Type level field override default' points to the 'Urgency' dropdown menu, which is currently set to 'High'. The 'Asset Request Type' is 'Reinstatement Expired Asset'. Other fields include 'Asset\*', 'Version\*', 'Request Due Date', and 'Request Approval Date'. Buttons for 'Cancel', 'Save + Create', and 'Save' are visible at the bottom.

- Considerations

- Default overrides can be defined for all field types where default values are allowed



# Default by Object Type

- Configuration

- Admin > Configuration > Objects > {Object} > Object Types > {Object Type Field} > Edit

Objects > Asset Request

Object Types ?

+ Create

Object Type Fields	Base Asset Request (base__v)	Reinstate Expired Asset (reinstate_expired_asset__c)	Source File Access (source_file_access__c)
Asset	✓	✓	✓
Asset Request Type	✓	✓	✓
Created By	✓	✓	✓
Created Date	✓	✓	✓
Global ID	✓	✓	✓
ID	✓	✓	✓
Last Modified By	✓	✓	✓
Last Modified Date	✓	✓	✓
Lifecycle	✓	✓	✓
Lifecycle State	✓	✓	✓
Link	✓	✓	✓
Reason for Request	✓	✓	✓
Request Approval Date	✓	✓	✓
Request Due Date	✓	✓	✓
Request Number	✓	✓	✓
Status	✓	✓	✓
Urgency	✓	✓*	✓

Reinstate Expired Asset - Urgency

Property Overrides:  
- Default Value

Objects > Asset Request > Object Types > Reinstate Expired Asset > Urgency ?

Details

Name urgency\_\_c

Source Custom

Options

User must always enter a value (required)

Picklist values

Override picklist values for this object type

Default Value

Fields | Functions | Operators ?

Search Operators

Picklist.urgency\_\_c.high\_\_c

Picklist default values should be returned as: Picklist.field\_\_c.Picklist value name  
Ex. Picklist.urgency\_\_c.high\_\_c

Check Syntax



Admin



# Flexible Job Scheduling

- Overview
  - Job scheduling options have been expanded to allow Admins to schedule jobs to run on an hourly, daily, weekly, or monthly basis
- Availability
  - This feature will be available to Admins automatically when creating or updating Job Definitions
    - Admin > Operations > Job Definitions
- Learn more about configuring [Job Definitions](#)

Job Definitions >  
Component: Expiration

Details

**Title\***  
Component: Expiration

**Name\***  
sc\_expire\_component\_assets \_\_c

**Job Owner\***  
System

**Schedule\***  
Daily  
Hourly  
Daily  
Weekly  
Monthly

Previously, Admins could only schedule jobs to run daily



# Support Upsert with Object Types

- Overview

- Vault loader now ignores values in the Object Type field during upsert and no longer errors when the same object type is specified for an existing record
  - Previously this action would fail because the object type field is a read-only on a record after creation

- Considerations

- New header added to toggle this behavior
  - NeverIgnore (Default pre-20R3): Must have edit permission on all fields
  - IgnoreSetOnCreateOnly (Default 20R3+): Ignore "set on create only" fields whose value has not changed
  - AlwaysIgnore: Ignore all fields whose value has not changed



# Managing Sandbox Allowances

- Overview

- This feature enables Vault Admins to:
  - Grant and revoke allowances to Sandboxes
  - View all Sandboxes in their Production tree, both direct and indirect clones, in one place

- Considerations

- The Set Allowance action is available via UI and REST API to manage allowances
- Limit: 4 level deep trees
- Can manage direct children only
- Temporary allowance management also available
- General Release: Only sees direct children
- Limited Release: Sees everything below
- Pre-Release allowances are not transferable

- Required Permission

- The Sandbox – Edit permission must be granted to the relevant permission set
- Admin > Users & Groups > Permission Sets > [Permission Set] > Admin > Sandbox - Edit

The screenshot displays the 'Sandbox Vaults' management interface. It is divided into two main sections: 'Available Sandbox Vaults' and 'Active Sandbox Vaults'. The 'Available Sandbox Vaults' section shows a table with columns for Type, Available, and Allowed. The 'Active Sandbox Vaults' section shows a table with columns for Name, Source Vault, Release, Type, and Available (Demo). A context menu is open over the 'DemoCSMMR' entry in the Active table, with the 'Set Allowance' option highlighted. A 'Set Allowance' dialog box is overlaid on the bottom right, showing options to Grant or Revoke an allowance for the selected sandbox (DemoCSMMR). The dialog includes a dropdown menu for the source vault (set to 'Demo') and a numeric input field for the allowance value (set to '2', with a maximum of 2). The dialog has 'Cancel' and 'Confirm' buttons.

Type	Available	Allowed
Demo	2	8

Name	Source Vault	Release	Type	Available (Demo)
DemoCSMAS	DemoCSM	Limited	Demo	0
DemoCSMJR	DemoCSM	Limited	Demo	0
DemoCSMJS	DemoCSM	Limited	Demo	0
DemoCSMML	DemoCSM	Limited	Demo	0
DemoCSMMR	DemoCSM	Limited	Demo	0
DemoCSMOM	DemoCSM	Limited	Demo	0



# Vault Loader: Bulk Remove Users from Document Roles

- Overview
  - Vault Loader will now support the bulk removal of users and groups from document roles
- Considerations
  - You need to know the user and group IDs
  - Loader ignores role names that are not available on specific documents

Vault Loader: Load ?

CSV File\* Choose

Object Type\* Document Roles

Action Type\* [Dropdown]

Key Field Update  
Delete

Record Migration Mode

Document Migration Mode

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

Map Fields ?

# Vault Loader: Document Metadata Extract to handle more than 10 Object References



- Overview

- Enhanced Vault Loader to support the extract of all document metadata and object columns in a single call even when there are more than 10 object references.
- The enhancement has been made to Vault Loader UI, CLI, and REST API

- Considerations

- VQL has a limit of 10 maximum object references allowed
  - Customers would have to perform multiple extracts and combine the data manually

**Before**

 Your Loader Job has Failed  
Details:  
• Reason for Failure: This extract includes more than the allowed number [10] of object relationships. Please use the "Override Default Column Selection" setting to select fewer object reference fields for extract.  
• Action Type: Extract  
• Object Type: Documents  
• Settings:  
• Where Clause:  
• Load Start Time: 9/16/2020 4:09 PM CDT  
seconds ago

**After**

**Notifications**

9/22/2020

 Your Loader Job has completed  
Details:  
• Action Type: Extract  
• Object Type: Documents  
• Settings:  
• Where Clause:  
• Load Start Time: 9/22/2020 12:54 PM PDT  
• Duration: 0 hrs, 0 mins, 11 secs (102.69 records per second)  
• 1,133 records extracted [download](#)  
seconds ago



# Configurable Landing Tabs

- Overview

- This feature allows Admins to configure which tab a user navigates to when they log in to Vault
  - For example, users can be directed to the *Library* upon logging in, rather than the *Tasks (Home)* tab

- Considerations

- This feature also adds the new *Landing Tab* field to the *User Object* to support configuration
- If using My Vaults, click on the *Vault name* to be directed to the configured landing page

The screenshot displays the 'My Vaults' section of a user interface. It features three vault cards, each with a 'My Tasks' donut chart and task/workflow counts. The middle card, 'CC CSM DAM Demo Vault', is highlighted with an orange box. An orange callout bubble points to this box with the text: 'If using My Vaults, click on the Vault name to be directed to the configured landing page'. Below each card is a 'Delegated from' field with a user icon and name.

Vault Name	Available tasks	Active workflows	My Tasks	Delegated from
Candidate Vault	0	0	0	Merle Dixon
CC CSM DAM Demo Vault	2	38	24	Jake Roberts
CC CSM DAM Demo Vault	0	5	4	Darryl Dixon



# Configurable Landing Tabs

- Configuration

- To add Landing Tab field: Admin > Configuration > Objects > {User Object} > Page Layout > {Layout} > Add Landing Tab field to layout section
- To update Landing Tab: Admin > Users and Groups > Vault Users > (User) > Landing Tab

The image displays two screenshots of the Veeva Vault user configuration interface. The left screenshot shows the 'General Info' section of a user object configuration page. The 'Landing Tab' field is highlighted with a red box, and a callout bubble points to it with the text 'Add Landing Tab field'. The right screenshot shows the 'User: CSM User' profile page. The 'Landing Tab' dropdown menu is highlighted with a red box, and a callout bubble points to it with the text 'Update default Landing Tab'.

# Generate Outbound Package from Vault Compare



- Overview
  - This feature enhances the Vault Comparison report with an option to generate Outbound Packages based on the differences found in the Vault comparison, if components are missing or different, they will get added to the outbound packages
- Considerations
  - Each Outbound package can contain a max of 200 components
- Learn more about [Generating Outbound Packages from Vault Compare](#)

The screenshot shows the 'Vault Compare' configuration page. At the top, there are three dropdown menus: 'Target Vault', 'Results Type' (set to 'Differences Only'), and 'Details Type' (set to 'Simple'). Below these are two checked checkboxes: 'Include Documents & Binder Templates' and 'Include Vault Settings'. The 'Component Types' section features a search bar and two columns: 'Ignored Component Types' (empty) and 'Included Component Types' (containing a list of component types like Dashboard, Docatomicsecurity, Docfield, etc.). At the bottom left, the checkbox 'Generate Outbound Packages' is checked and highlighted with a red box. A 'Finish' button is located at the bottom right.



# Appendix



# User Permission Sets

- Overview

- When the *Allow User-level Assignment* feature is enabled the User detail page displays a new Permission Sets section allowing the Admin to assign permission sets at the individual user record level

Users >  
User: Amy Duong ★ ACTIVE

Details

License Type Full User  
Security Profile eTMF Admin/ Manager  
Activation Date 05 Mar 2020  
Status Active

Created By Jon Chickneas  
Created Date 05 Mar 2020 1:49 AM EST  
Last Modified By Jon Chickneas  
Last Modified Date 05 Mar 2020 1:49 AM EST

Federated ID

Permission Sets ?

Name	Level
<a href="#">QMS user base actions</a>	Security Profile
<a href="#">Equipment Initiator</a>	User
<a href="#">Audit Creator</a>	User

- Considerations

- Vault applies the permission sets assigned at the user level and profile level at run time, when the user is logged in
- Requires Support enablement and product manager approval



# User Permission Sets

- Configuration
  - Admin > User & Groups > Permission Sets > {Permission Set} > Edit

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

USERS & GROUPS

- Vault Users
- Active Delegations
- Groups
- Security Profiles
- Permission Sets**
- Application Roles

Permission Sets >  
**New Permission Set**

**Details**

Status Active ▾

Name\* My Permission Set

Description Object permissions that can be assigned to an individual user.

Allow user-level assignment ⓘ



# Truncated Search Result Warning

- Overview

- This enhancement provides users with a UI banner notification when they perform a full-text search that hits the 5,000 results limit of relevant matches
- The banner will inform the user that some of the results have been omitted
- The user can see a complete set of results by applying additional filters to the full-text search

These search results were truncated because there were too many matches in the document content. Apply more filters to see all results.



# Domain User UI Enhancement

- Overview

- With this release, the Vault Memberships section on the Domain User record detail page lists only Vaults for which a domain user has an active or inactive Vault membership

**Before**

▼ Vault Memberships			
Search Name <input type="text"/>			
Vault ▲	License Type	Security Profile	Status
Candidate Vault	Full User	Vault Owner	Active
CC CSM DAM Demo Vault	Full User	Vault Owner	Active
MedCommsDemo	Full User	Vault Owner	Active
MR Demo - General Release	Full User	Business Administrator User	Active
MR Demo Vault	Not a member		
MR_CSM_LR_Sandbox	Not a member		

**After**

The screenshot shows the 'Domain User: Janice Ruiz' record detail page. The 'Vault Memberships' section is expanded, showing a table with columns for Vault, License Type, Security Profile, and Status. The table lists several vaults, including 'MR Demo Vault' and 'MR\_CSM\_LR\_Sandbox', which are now listed with a status of 'Inactive'.

Vault ▲	License Type	Security Profile	Status
Candidate Vault	Full User	Vault Owner	Active
Candidate Vault	Full User	Vault Owner	Active
CC CSM DAM Demo Vault	Full User	Vault Owner	Inactive
MedCommsDemo	Full User	Vault Owner	Active
MR Demo - General Release	Full User	Business Administrator User	Inactive



# Platform Data Model Changes

- Added the following components to support Landing Tabs:
  - Added the Tab Group (tab\_group\_\_sys) object, which contains records of all tabs that can be selected for a Landing Tab
  - Added a new User Landing Tab (landing\_tab\_\_sys) field to the User (user\_\_sys) object
- Added the following components to support Integration Query Object Rules:
  - The Integration Rules component is extended with subcomponent Query Object Rules, including fields:
    - Active (active)
    - Label (label)
    - Filter (filter\_clause)
    - Object (query\_object)
    - Primary Object (Yes/No) (primary\_object)
    - Relationship (relationship)
- Added the following component to support User Permission Sets (support-only feature enablement):
  - Added the User Permission Set (user\_permission\_set\_\_sys) object. This object is used to provision user permission set assignments

# Platform Data Model Changes



- Added components to support Checklist Question Guidance Text:
  - Added the Question Help Text (`question_help_text__v`) field to the following objects:
    - Question Design (`question_design__sys`)
    - Response (`response__sys`)
    - Library Question (`library_question__sys`)
- Added components to support Checklist Enhancement: Decimal Response:
  - Added the Decimal Places (`decimal_places__sys`) field to the following objects for the Number Question object type (`number_question__sys`):
    - Question Design (`question_design__sys`)
    - Response (`response__sys`)
    - Library Question (`library_question__sys`)
- Added the following components to support Application Performance Statistics:
  - A new standard object Performance Stats-Application (`app_perfstats__sys`) has been added to all vaults. This object captures additional performance statistics specific to your application
  - As of 20R2.3, this object exists to support this future functionality and does not yet track any statistics



# Platform Data Model Changes

- Added the following values to the Language (language\_\_v) picklist:
  - Chechen
  - Chuvash
  - Corsican
  - Herero
  - Kalaallisut-Greenlandic
  - Kirghiz-Kyrgyz
  - Mandarin
  - Romansh
  - Samoan
  - Turkmen
- Updated the Link (link\_\_sys) field on Checklist related objects to enforce uniqueness and help with migration:
  - Checklist Design (checklist\_design\_\_sys)
  - Section Design (section\_design\_\_sys)
  - Question Design (question\_design\_\_sys)
  - Available Answer Design (available\_answer\_design\_\_sys)
  - Dependency Design (dependency\_design\_\_sys)
  - Checklist Design Master (checklist\_design\_master\_\_sys)
  - Sub-Checklist Design (subchecklist\_design\_\_sys)

# Commercial Data Model Changes



- Overview

- In this release, we've added the following components to the Commercial data model to support new features:

- Added new object *Embedded Metadata* (embedded\_metadata\_\_sys)
    - Added new document field *Approved Links* (annotations\_approved\_\_v)
    - Updated the following fields to be non-mandatory on all documents:
      - *Content Creation Cost* (content\_creation\_cost\_\_v)
      - *Content Creation Currency* (content\_creation\_currency\_\_v)
      - *Global Content Type* (global\_content\_type\_\_v)
    - Added new *Related Portals* Portal Widget object type
    - Added new *Related Portals* Portal Widget Content object type
    - Added a label for the description/about section to the *Portal* object
    - Added new *Create From Annotation ID* (create\_from\_annotation\_id\_\_sys) field on the *Link Target* and *Claim* objects
    - Added new *Create From Annotation Source* (create\_from\_annotation\_source\_\_sys) field on the *Claim* object

# Commercial Data Model Changes



- Considerations

- Please note that some of these data model changes are relevant to your MedComms Vault too – such as the related portals changes.
- Features related specifically to PromoMats only are not relevant to MedComms Vaults, these include those changes for Standard Metrics and Auto Claims Linking.
- Click on the links for more information. Links are available on the downloadable slides – see the penultimate slide called Resources.

# MedComms Data Model Changes



- Following changes have been made to the MedComms Data Model
  - Added new join object Case Response Recipient Join (case\_response\_recipient\_join\_\_v) with the following fields:
    - Case Response (Parent Object)
    - Person (Parent Object)
    - User (Parent Object)
    - Recipient Type (recipient\_type\_\_v)
  - Case\_response\_recipient\_join\_\_v object has the following object types:
    - Associated Contact (associated\_contact\_\_v)
    - Colleague (colleague\_\_v)
    - Case Contact (case\_contact\_\_v)
    - User (user\_\_v)
  - Added new picklist Recipient Type (recipient\_type\_\_v) with values CC (cc\_\_v) and BCC (bcc\_\_v)
  - Added the following new fields on the *Case Response Emails* object:
    - Reply To (reply\_to\_\_v)
    - CC Recipients (cc\_recipients\_\_v)
    - BCC Recipients (bcc\_recipients\_\_v)

# MedComms Data Model Changes



- Continued ...
  - Added the following new object types on the *Person* object:
    - Associated Contact (associated\_contact\_\_v)
    - Colleague (colleague\_\_v)
    - Centralized Email Address (centralized\_email\_address\_\_v)
  - Added new field *Primary Case Contact* (primary\_case\_contact\_\_v) on the *Person* object\*
  - Added the following new fields on the *Case Response* object:
    - Case Response Recipient Join (case\_response\_recipient\_join\_\_v)
    - Reply To (reply\_to\_\_v)

\* Only for the *Associated Contact* object type

# Set Latest Version for Vault File Manager



- Overview

- Organizations can now control when the Vault File Manager automatically updates to the latest version by adding keys to the user's registry to indicate the highest version that the VFM client can update to

- Considerations

- Setting up this option could prevent users from receiving critical bug fixes
- Vault File Manager will not update to a newer version than the one defined in the user's registry, even when there are updates available



# High Volume Object

- Overview

- This feature add a new high-volume data store option for Vault objects that is optimized to deliver fast write performance for large or frequent transactions

- Considerations

- The high-volume option has a narrower feature set than standard Vault objects and requires technical knowledge to configure optimally
  - No tokenized search, Lookup, Multi-value picklist, or PII fields
- We recommend thoroughly reviewing the feature documentation and/or working with managed services before using this data store option



# High Volume Object

- Configuration
  - Admin > Configuration > Objects > Create New Object

Objects >  
Create Object ?

Details ?

Object Label\*

Object Plural Label\*

Object Name\*  \_c

Status

Source

**Data Store**

Description



# Integration Query Object Rules

- Overview

- Integrations query object rules are used to define rules that restrict the data or documents sent to a target vault in HTTP callbacks associated with Spark integrations
- Query object rules are a rule type within Integration Rules where the existing field rule SELECT data or documents
- The new query object rule can filter the data further with a WHERE filter clause using Criteria VQL

# Exclude Security Overrides Referencing Auto-Managed Groups When Migrating Document Fields

- Overview

- When migrating document fields, Vault does not include security overrides that reference Auto-Managed Groups in configuration migration packages

# Merge Fields Token Character Length Increase



- Overview

- This total length of a Merge Field token in Microsoft Word DOCX files has been increased to a maximum of 1,000 characters to make it easier to use referencing fields in related object records

# Expand Sibling Record State Check Entry Action to All Applications



- Overview

- The lifecycle entry action ‘Check Sibling Records’ before updating related record, which validates that all the siblings of a record are in the same state or group of states before changing the state of a related record, is now available in all Vaults

- Use Case

- This configuration option is ideal for actions where an organization wants the related record to change states once all actions are complete

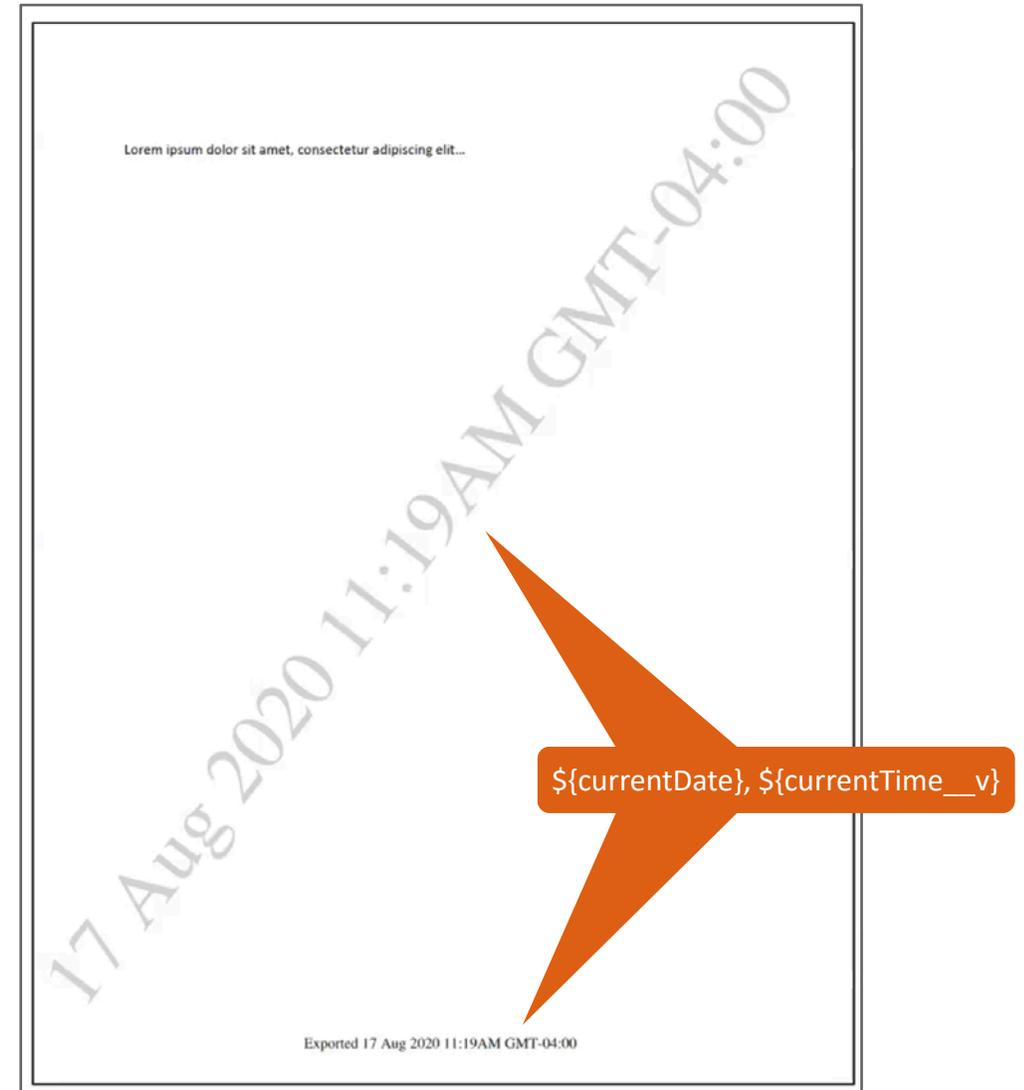
- Configuration

- Admin > Configuration > Object Lifecycles > [Lifecycle that applies to the “sibling” object]
  - Click into the lifecycle state that you want all sibling records to be in when you change the related record state
  - Add the Check sibling records before updating related record entry action
  - Under All sibling records in lifecycle state, select one or more lifecycle states of records that you want to check
  - Under Related Object, select the related object that you want to move to a new state. The object must be related through an outbound relationship, either Parent or Reference
  - Select the Target State for the related object
  - Click Save



# Show Current Time in Overlays

- Overview
  - In order to provide a more compliant way to track documents exported from Vault, Document Overlays can now be configured to display the current time and time zone by utilizing the new ``${currentTime__v}`` token
- Considerations
  - The token will display the user's time zone
    - Time format can be 12-hr or 24-hr depending on user's locale and Vault format setting
- Use Case
  - The full date and time the rendition was downloaded from Vault can be captured by utilizing the current time token along with the existing current date token





# Show Current Time in Overlays

- Configuration
  - Admin > Business Admin > Overlays > [Overlay] > Edit
- Learn more about managing [Overlays](#)

Overlay Templates >  
**Current Status** ?

Details

<b>Name *</b>	Current Status	
<b>Header</b>	<input type="text"/>	<input type="button" value="[-]"/>
	<input type="text"/>	<input type="button" value="[-]"/>
<b>Diagonal Watermark</b>	<code>\${currentDate}; \${currentTime__v}</code>	<input type="button" value="[-]"/>
<b>Footer</b>	<input type="text"/>	<input type="button" value="[-]"/>
	<input type="text"/>	<input type="button" value="[-]"/>

The current time token can be used in the header, watermark, and footer



# Show Current Time in Overlays

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

DOCUMENT SETUP

- Document Types
- Document Fields
- Field Dependencies
- Field Layout
- Rendition Types
- Searchable Object Fields
- Document Tags
- Rendition Profiles

OBJECT SETUP

- Objects

REPORT SETUP

- Report Types
- Report Views

QUEUE SETUP

- Queues

CHECKLIST SETUP

- Checklist Types

VAULT NAVIGATION

- Page Links
- Tabs

BUSINESS LOGIC

- Document Lifecycles
- Document Lifecycle Stage Groups
- Multi-document Workflows
- Object Lifecycles
- Object Lifecycle Stage Groups
- Object State Types

### Document Types

Expand all Collapse all

- Base Document (base\_document\_\_v) ▾
  - Photo Shoot Proofs (photo\_shoot\_proofs\_\_c)
  - Claims Document (claims\_document\_\_c)
  - Event Material (event\_material\_\_v) ▾
  - InDesign Component (indesign\_component\_\_v) ▾
  - Material (material\_\_c)
  - vSDK Spark Document (vsdk\_spark\_document\_\_c)
  - Reference (reference\_\_c)
    - Claims Document (claims\_document1\_\_c)
  - Component (component\_\_c)
    - Campaign Toolkit (campaign\_toolkit\_\_c)
  - License File (license\_file\_\_c)
    - Health Authority Form (health\_authority\_form\_\_v) ▾
    - Compliance Package (compliance\_package\_\_v) ▾
    - 2301 CVM Animal Health (2301\_cvm\_animal\_health\_\_c)
    - Multichannel Presentation (engage\_presentation\_\_v) ▾
    - Multichannel Slide (slide\_\_v) ▾
    - Email Template (email\_template\_\_v) ▾
    - Email Fragment (email\_fragment\_\_v) ▾
    - Master Email Fragment (master\_email\_fragment\_\_v) ▾
    - Template Fragment (template\_fragment\_\_v) ▾





Resources

# Resources

- Contact your Customer Success Manager or Managed Services Consultant
- Email: [VaultCustomerSuccess@veeva.com](mailto:VaultCustomerSuccess@veeva.com)
- 20R3 Release Kit: <https://www.veeva.com/products/commercial-vault-release-presentations/>
- Vault Resource Library: <https://support.veeva.com/hc/en-us/articles/360013243773-Veeva-Vault-Educational-Resource-Library>
- Veeva & U: <https://www.veeva.com/eu/commercial-hub/medical-innovation/>
- Vault Help: <http://vaulthelp2.vod309.com/wordpress/>





Thank you