Veeva Commercial Vault MedComms 20R3 Deep Dive

November 2020

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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

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 **November 2**: System Release Memo **November 3**: Compliance Documents **November 6**: 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 https://veeva.zoom.us/webinar/register/WN_EXzZRh1cRVOHstp6ZlvHDg
Nov 17	20R3 NA PromoMats Q&A Session https://veeva.zoom.us/webinar/register/WN_0gjt1ZWQT1yfJDpYLZSrGA
Nov 24	20R3 EU PromoMats Q&A Session https://veeva.zoom.us/webinar/register/WN_rNXUcdxsT468fZVoRFwgZg
Dec 4	Release to all general release PODs

Announcements

3000+
attendees from life sciences

Join our European Community

Hear Latest Veeva Innovations

Get Best Practices

Connect & Collaborate

250+
life science companies

Veeva Commercial & Medical Europe

SUMMIT ONLINE

17 - 18 November 2020

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Veeva & U Community Forums

Join a Growing European Community

142% increase in participants since 2017

86 total companies represented

+4 new regions since 2017

Average event rating **8.2** out of 10

Help Your Company Drive Business Value

1 **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

2 **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

3 **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

Atomic Security for Documents:
Active Workflow Actions
Lifecycle User Actions

20R2 Aug 2020
Support Enabled

will change to

21R1 Apr 2021
Auto-On Enabled

- ***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

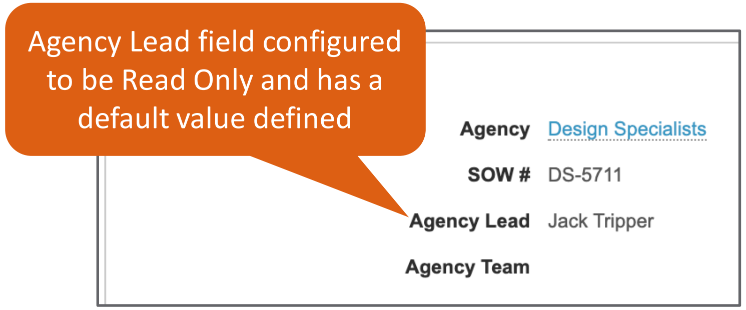
Veeva Support

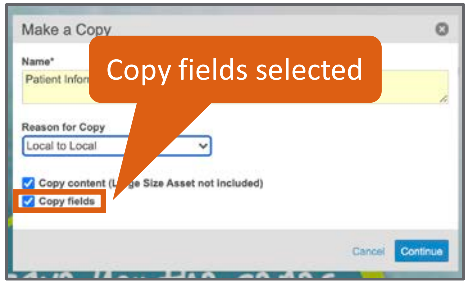
Auto On Features

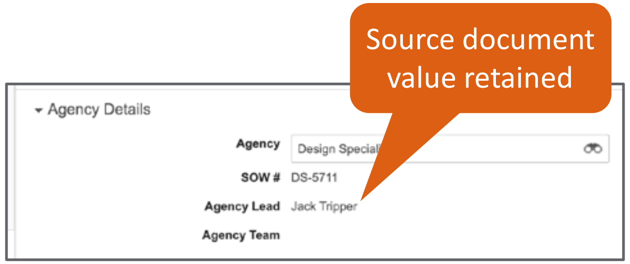
Auto On: Working with Documents

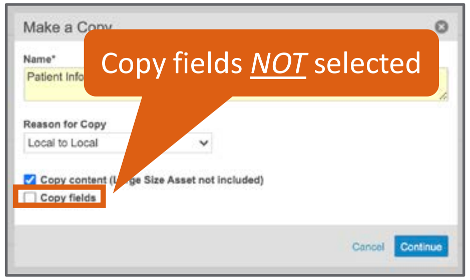
Changes to Make a Copy for Read-Only Fields

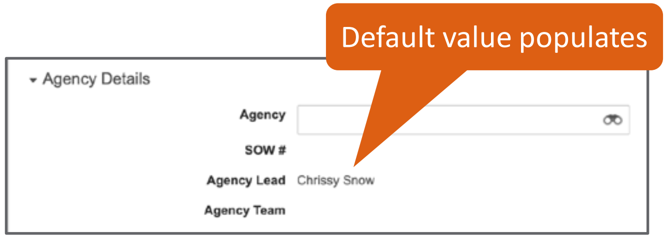
- Overview
  - Prior to 20R3 Read Only fields did not retain source document values or populate with default values when making a copy of a document. Now:
    - If ‘Copy Fields’ is selected, Read Only fields will retain the original document field value
    - If ‘Copy Fields’ is <u>not</u> selected, 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







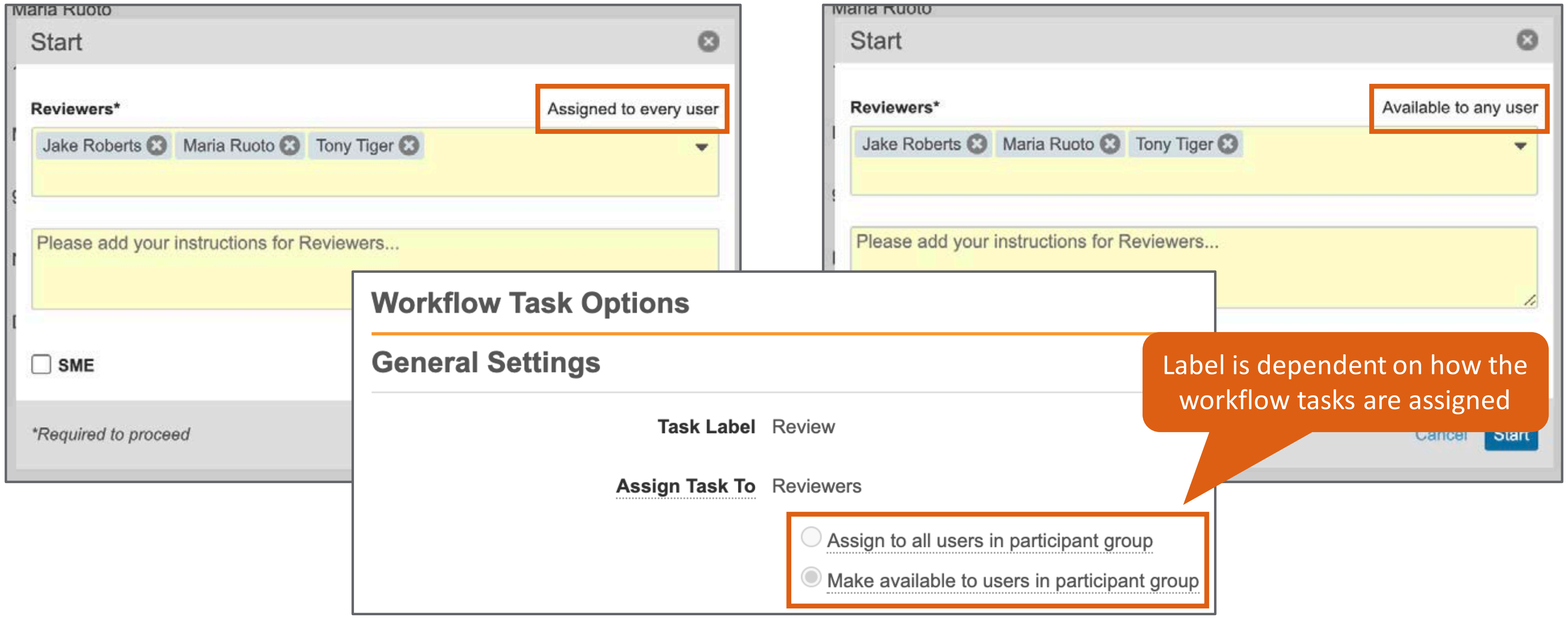




** If one has been configured by the Admin*

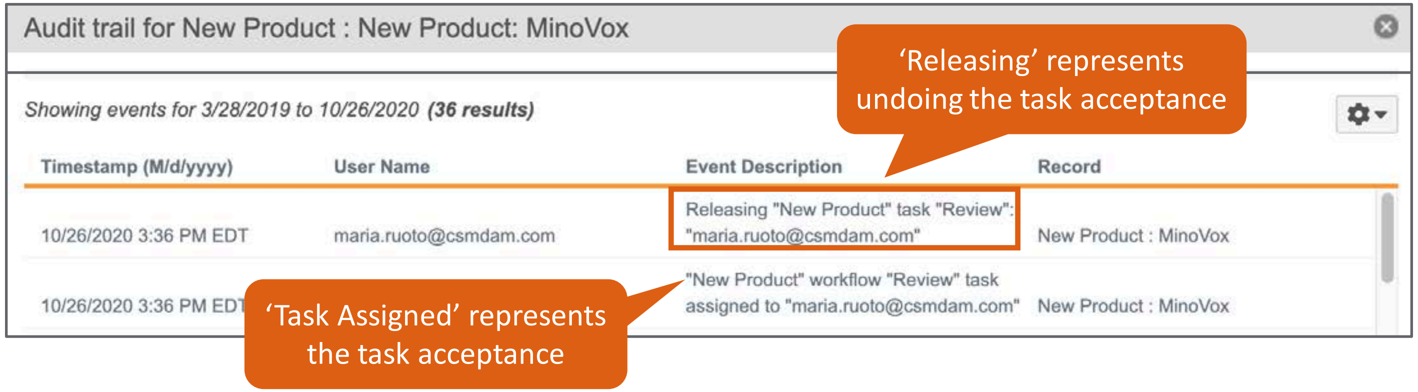
Participant Control Help Labels

- 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



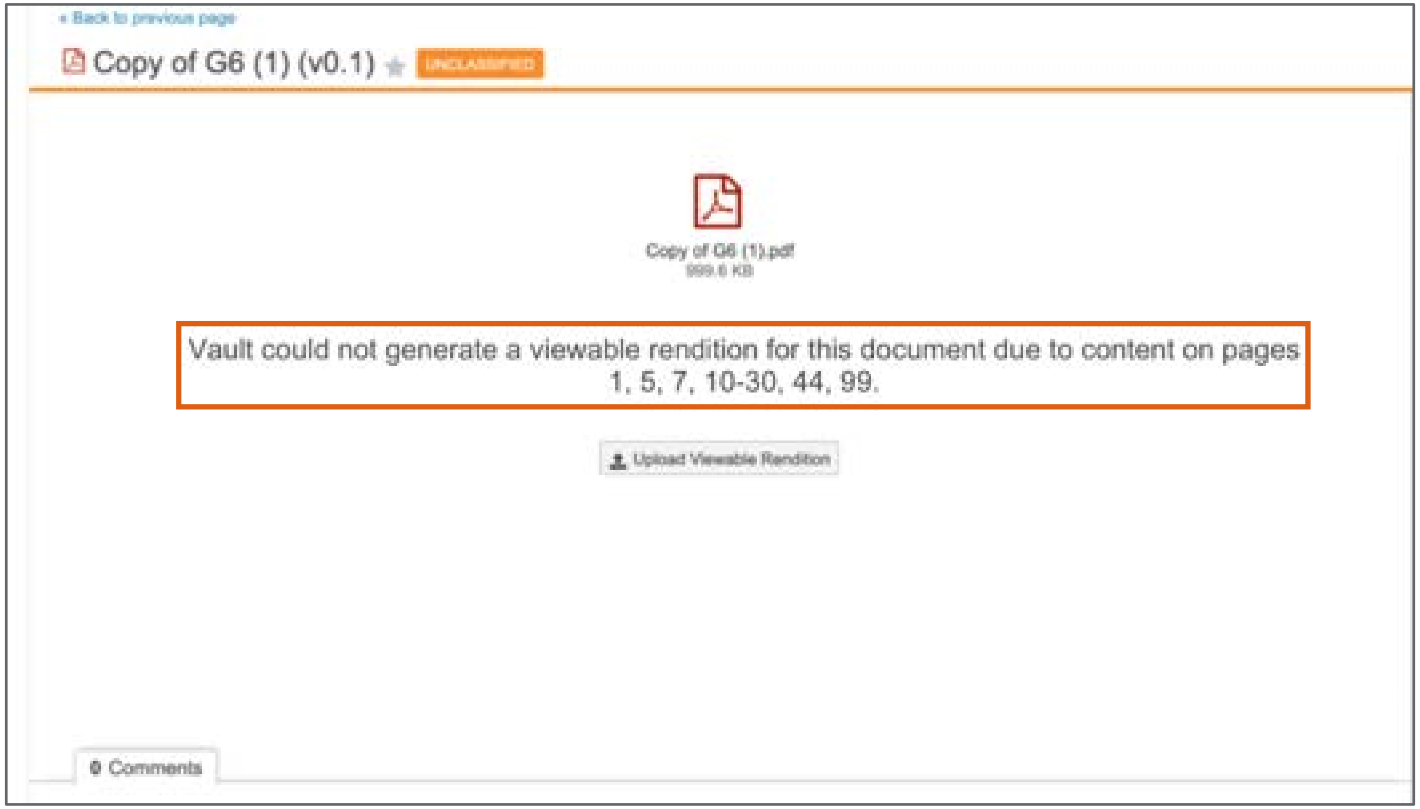
Undo Acceptance of Tasks

- 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



Improved Rendering Feedback

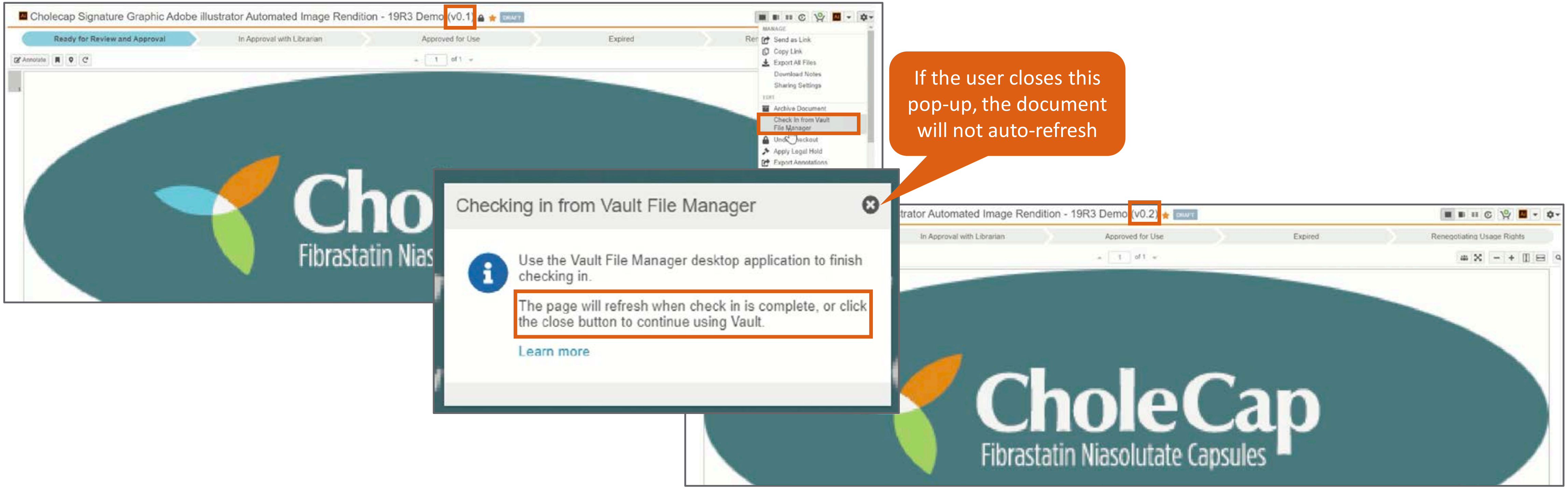
- Overview
  - Vault will now detect the content in documents that is the cause of rendering failures and provide users with error messages to troubleshoot issues



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

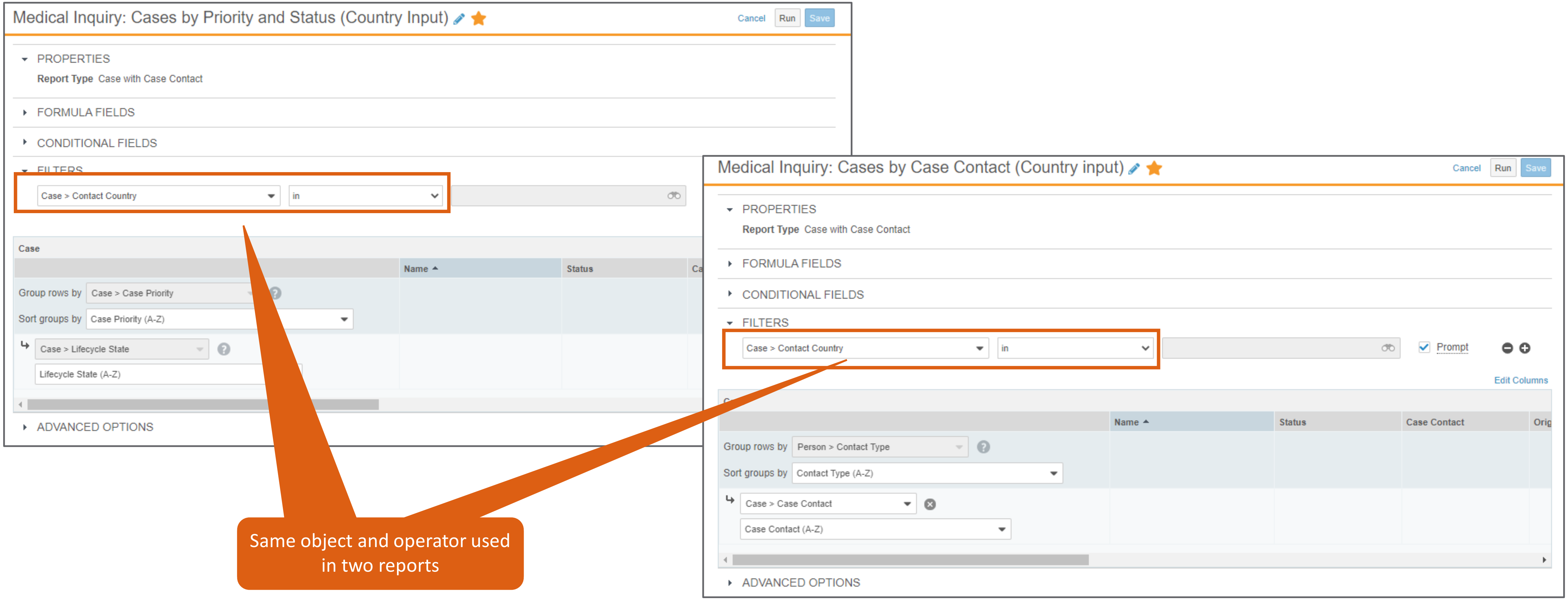


Vault File Manager: Auto-Refresh When Checking In

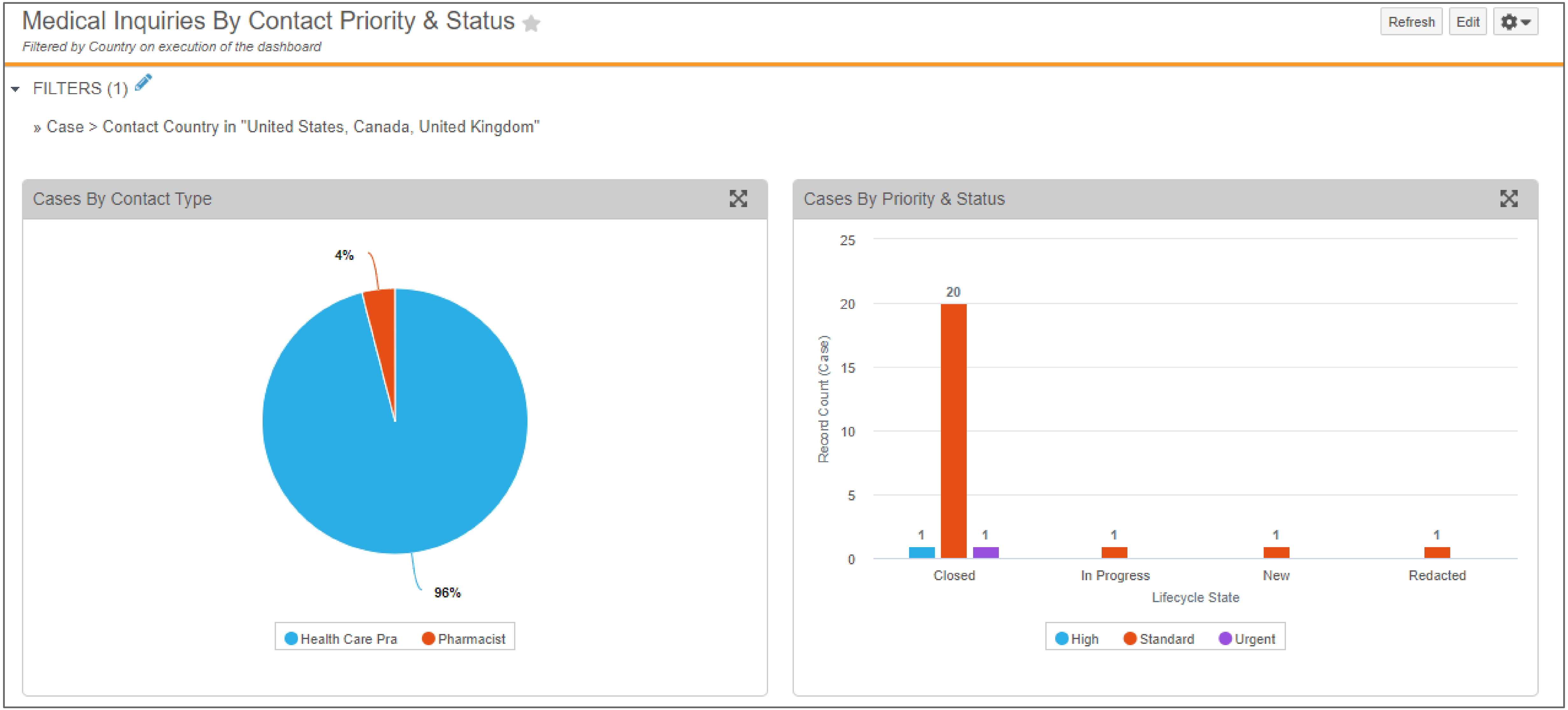
Auto-On: Reporting

Reporting: Combine Dashboards Prompts

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



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

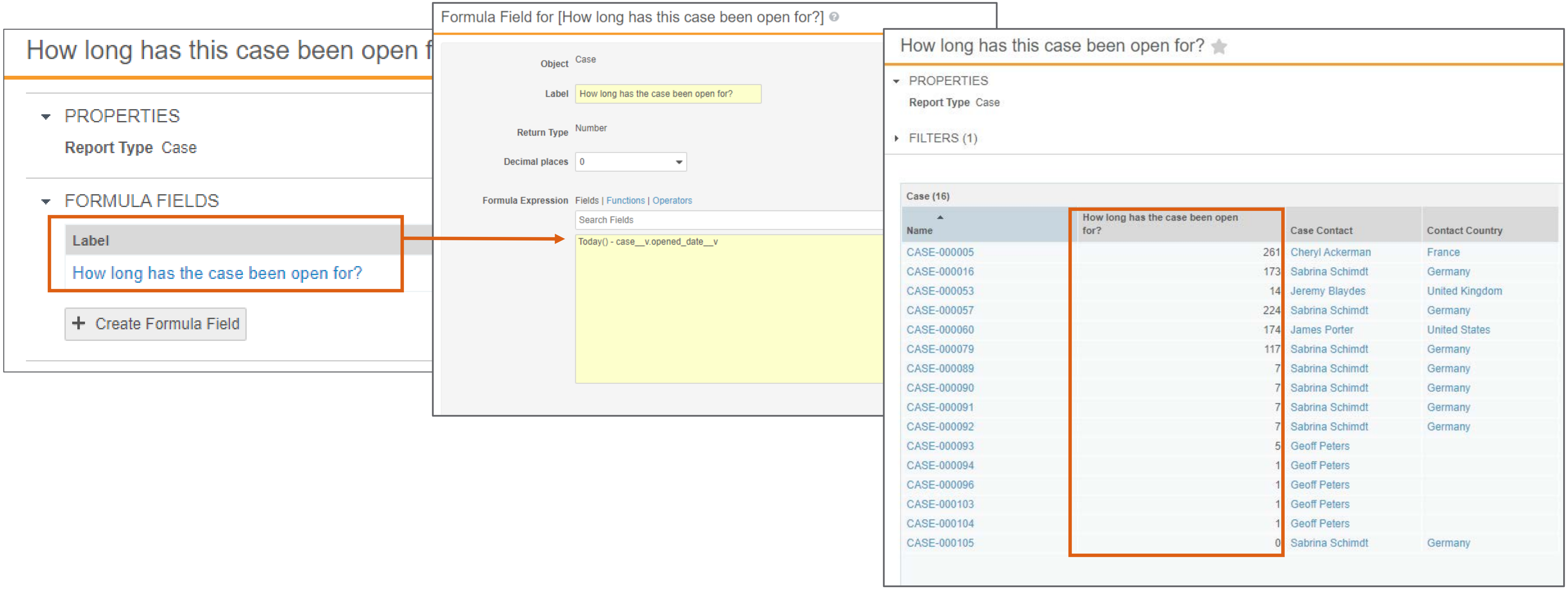
FILTERS (2)

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
				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 (v 0.1)	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

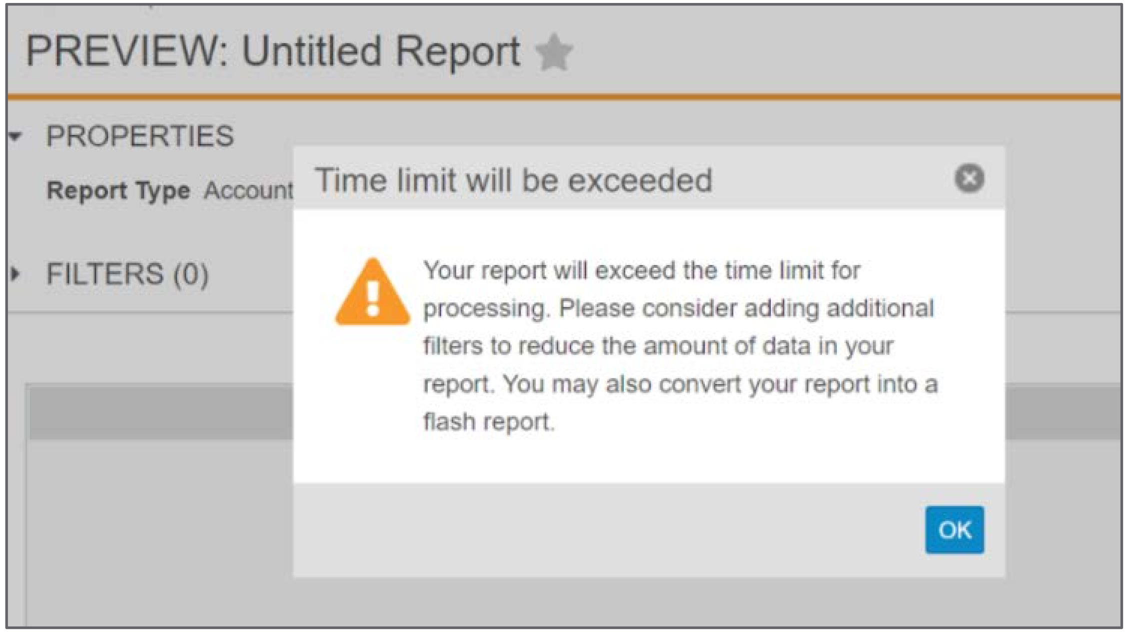


Reporting: Object Formula Fields in Reports

- 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

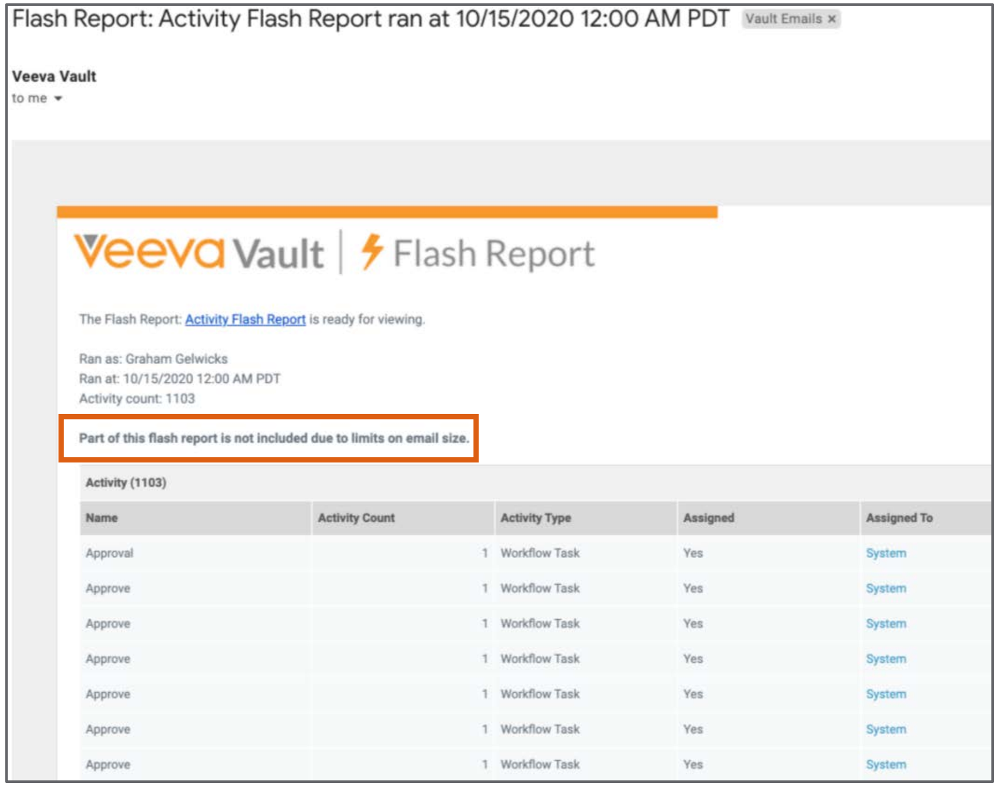
Reporting: Early Timeout Detection for Reports

- 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 ×

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	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System

Demo

Reporting Demo: Part 2

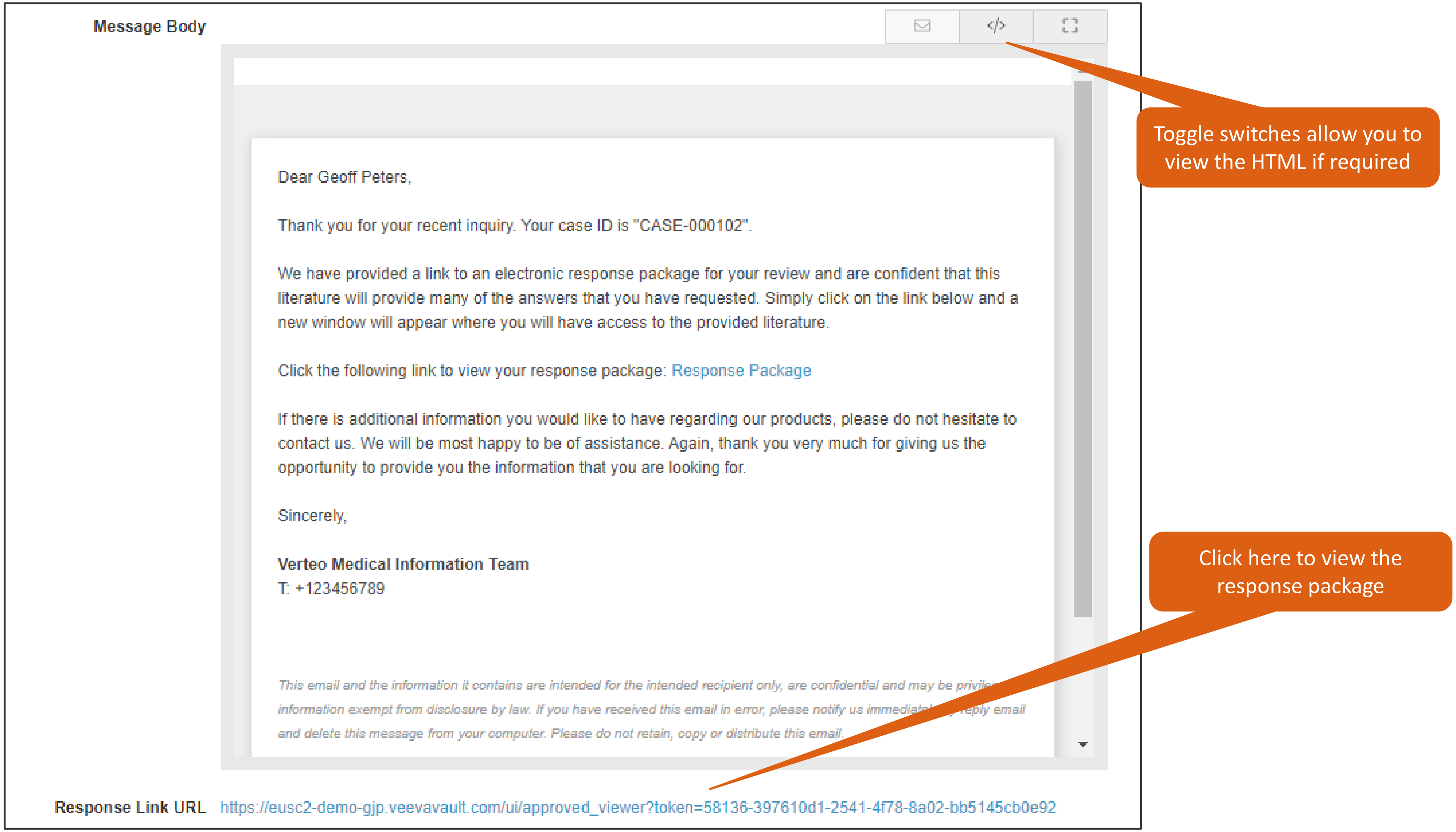
Configuration: Medical Inquiry Changes

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

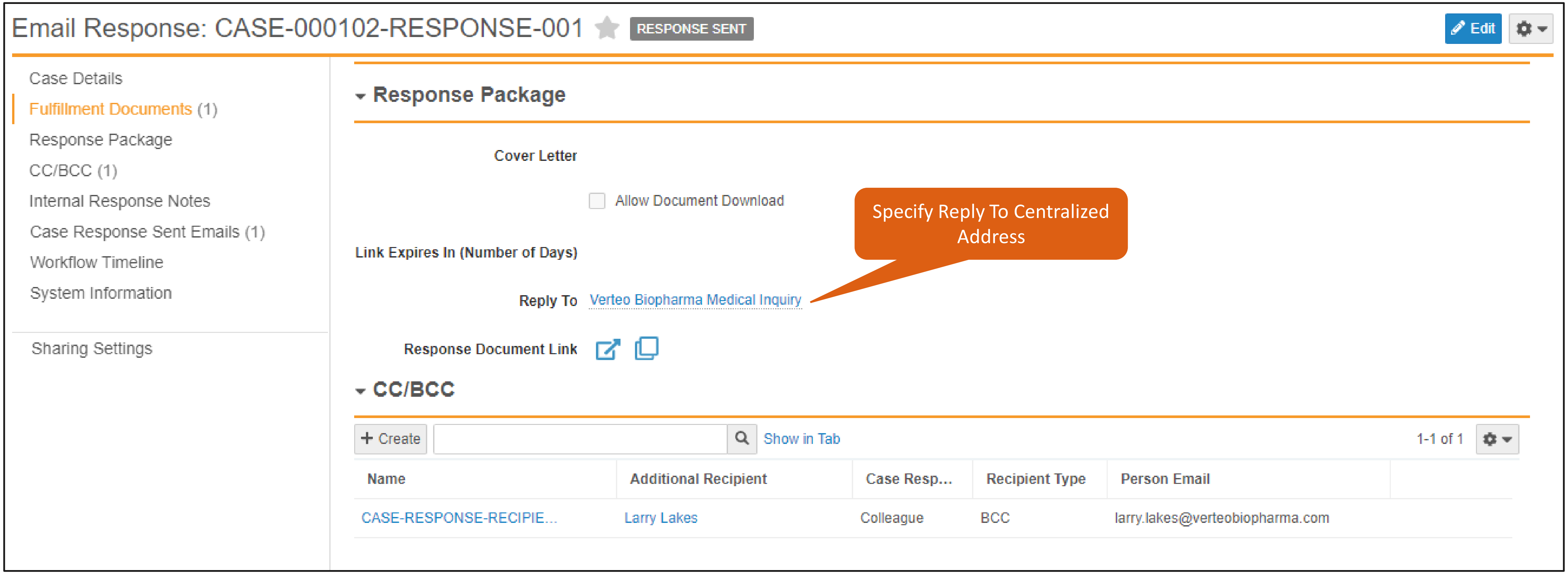
Case Response Email Body Rendering



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



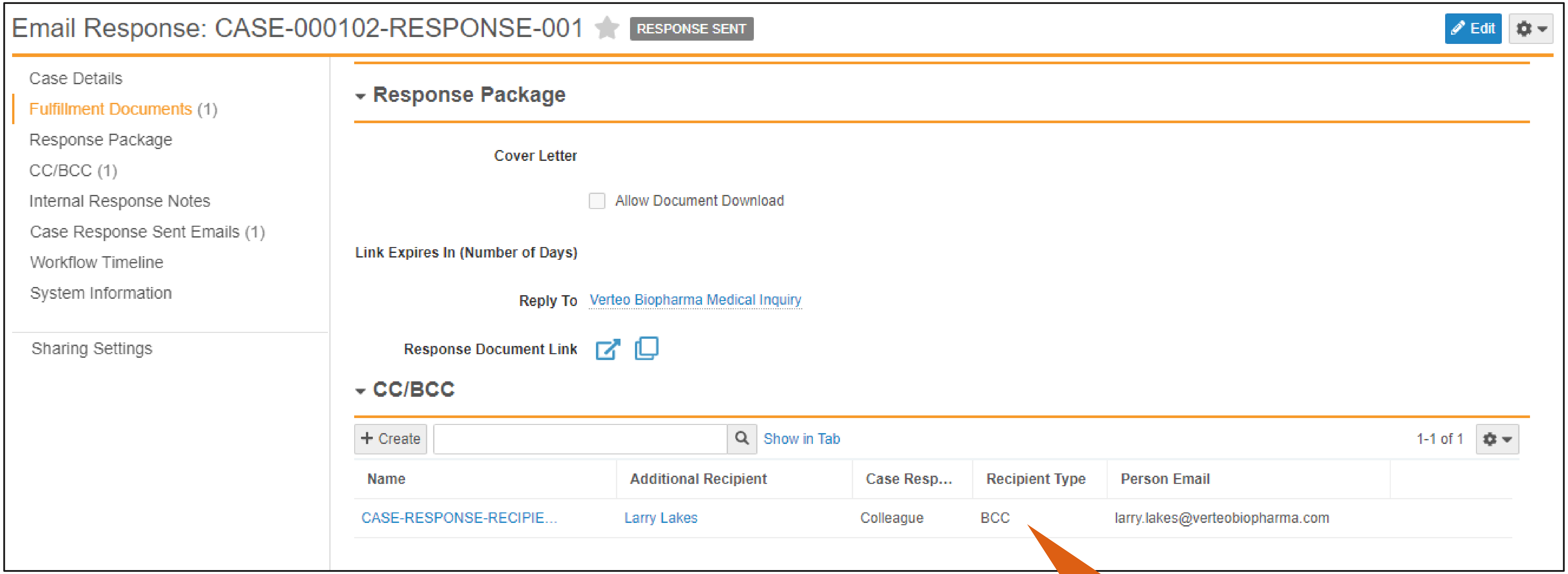
Demo

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



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

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

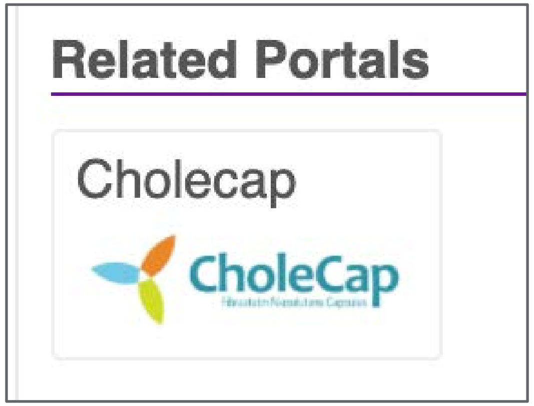
Demo

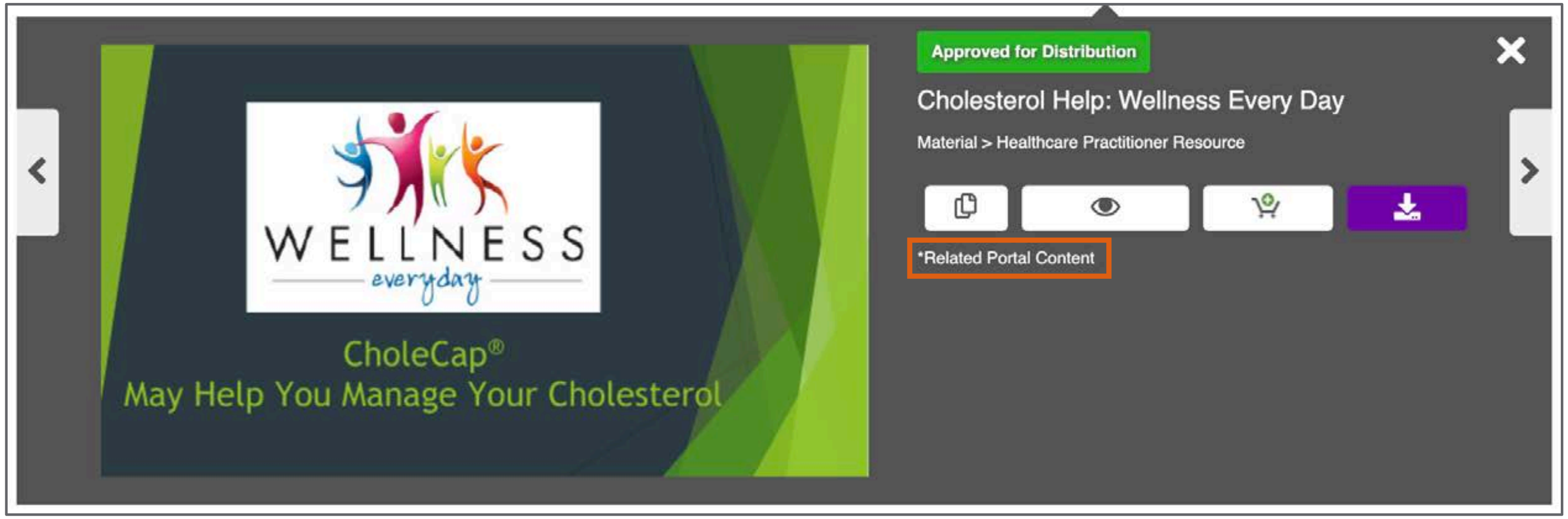
Medical Information Updates: Part 2

Configuration: Portals

Portals: Related Portals

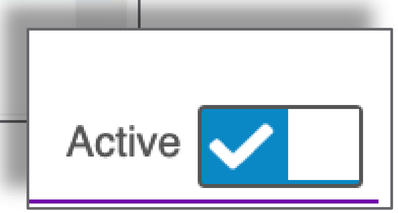
- Overview
  - This feature allows Portal Admins to associate multiple Portals, allowing users to filter and search results from the current and any related Portals
- Considerations
  - The Related Portals widget will be inactive by default; it must be made active by a Portal Admin
  - The Related Portals relationship is not reciprocal
  - Content from related Portals is marked as '*Related Portal Content'
  - You can add up to 12 Related Portals

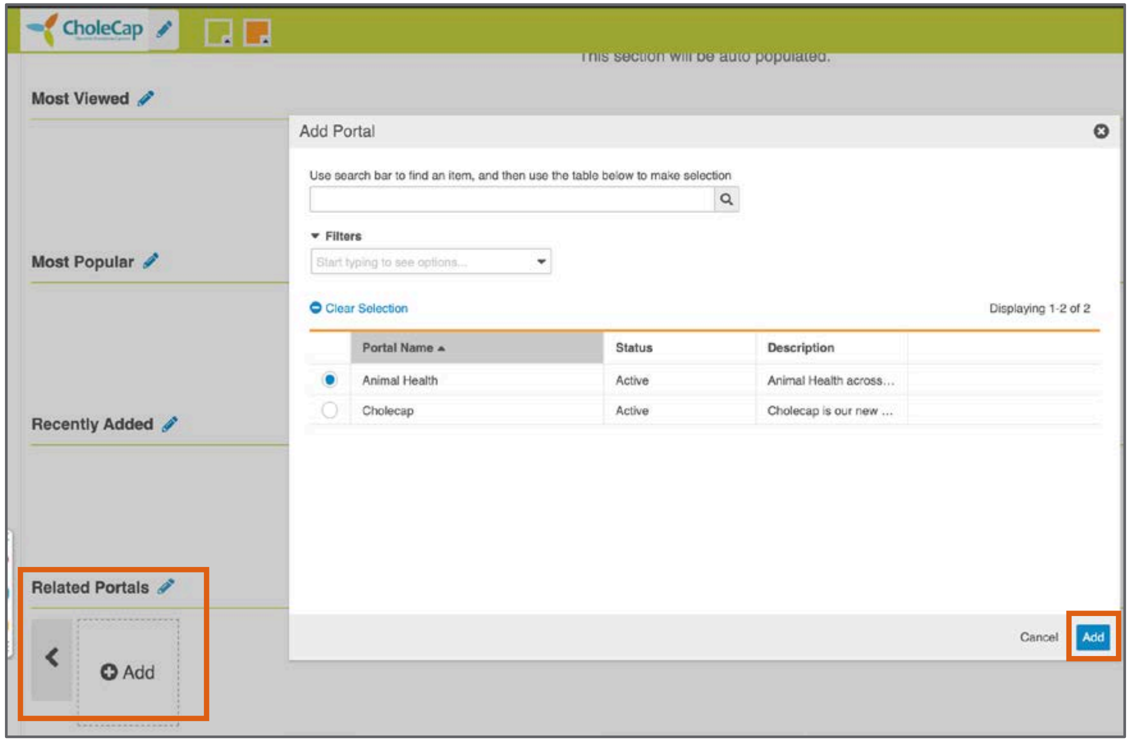




Portals: Related Portals

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





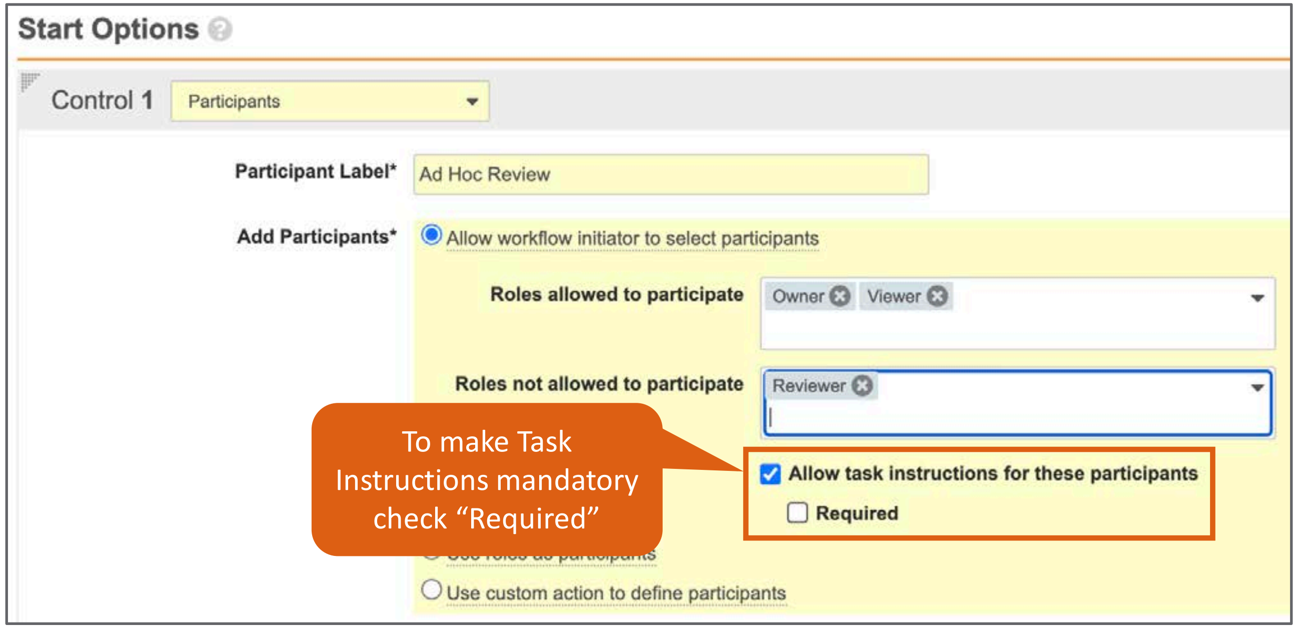
Configuration: Object & Multi-Document Workflows

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

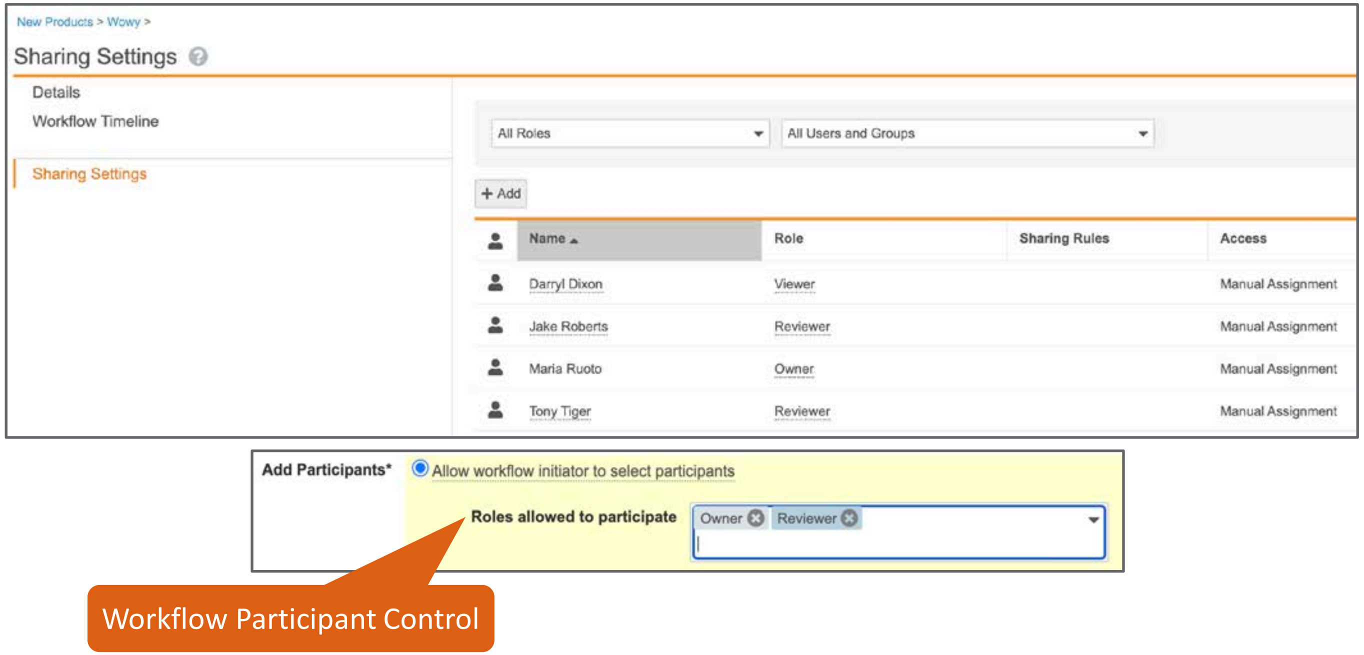
Ad Hoc Task Instructions

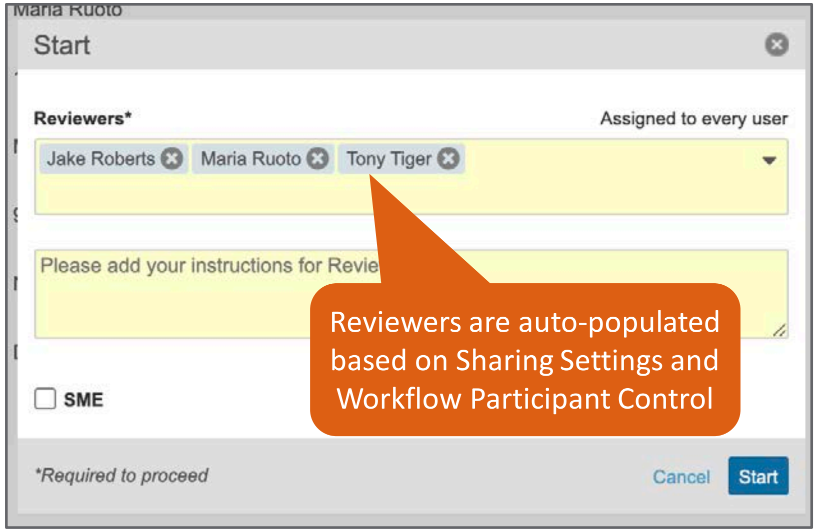
- Use Case
  - Workflow initiators can provide additional instructions to each user group
- Configuration
  - *Start Step*: Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > Start > Edit > Add Control
  - *Object Message*: Admin > Configuration > Object Messages >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



Default Users from Sharing Settings

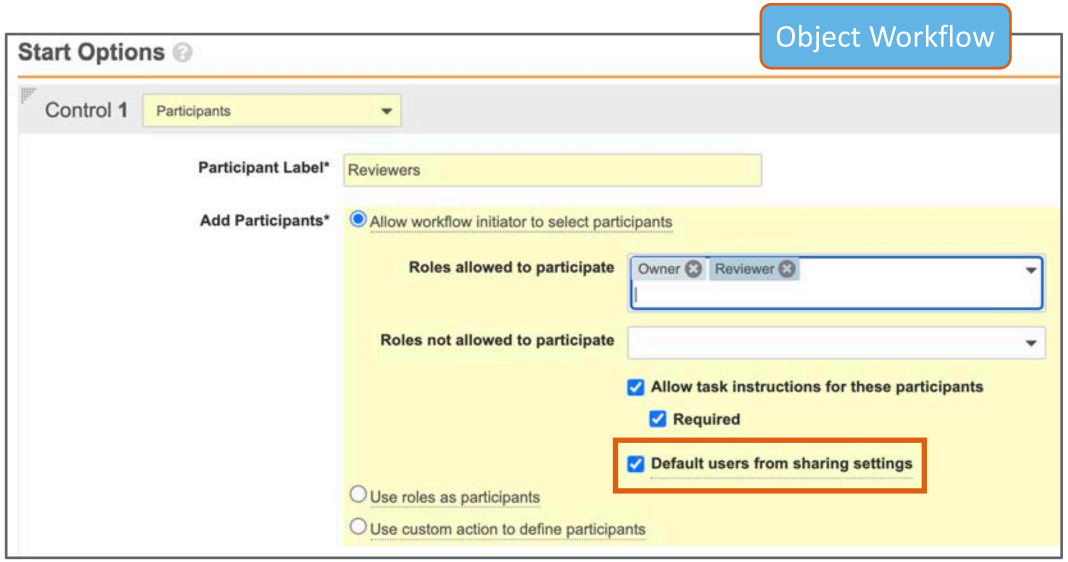
- Overview
  - Admins can now configure Object and Multi-Document Workflows to auto-populate users and groups at the workflow start step based on their roles
    - For example, if the Reviewer and Owner roles are allowed to participate in the Review Task, users assigned those roles in the Sharing Settings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

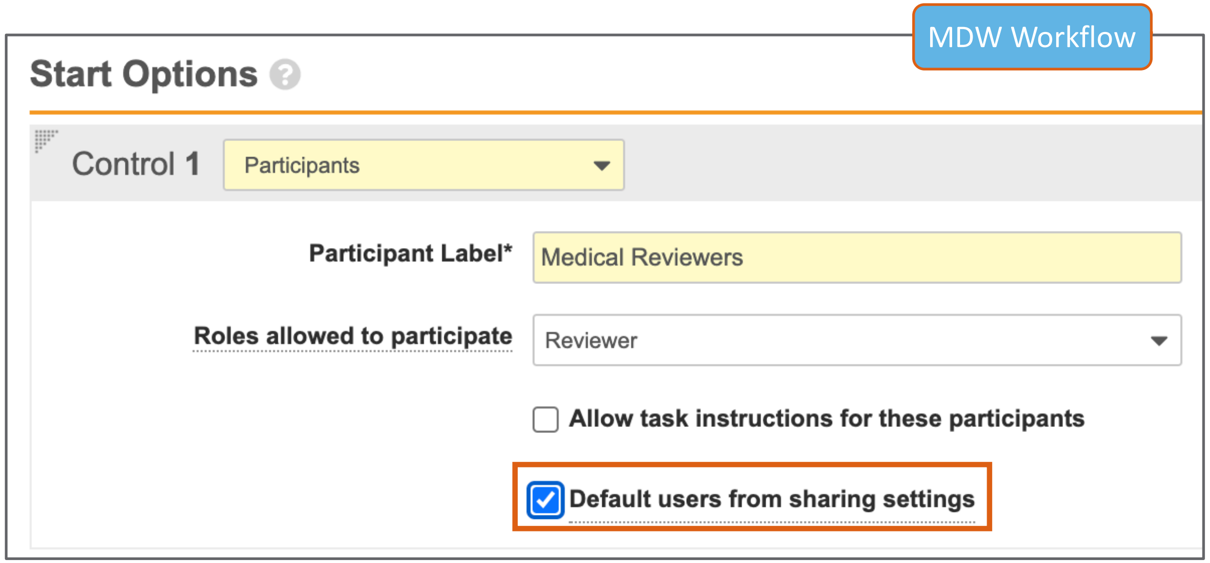




Default Users from Sharing Settings

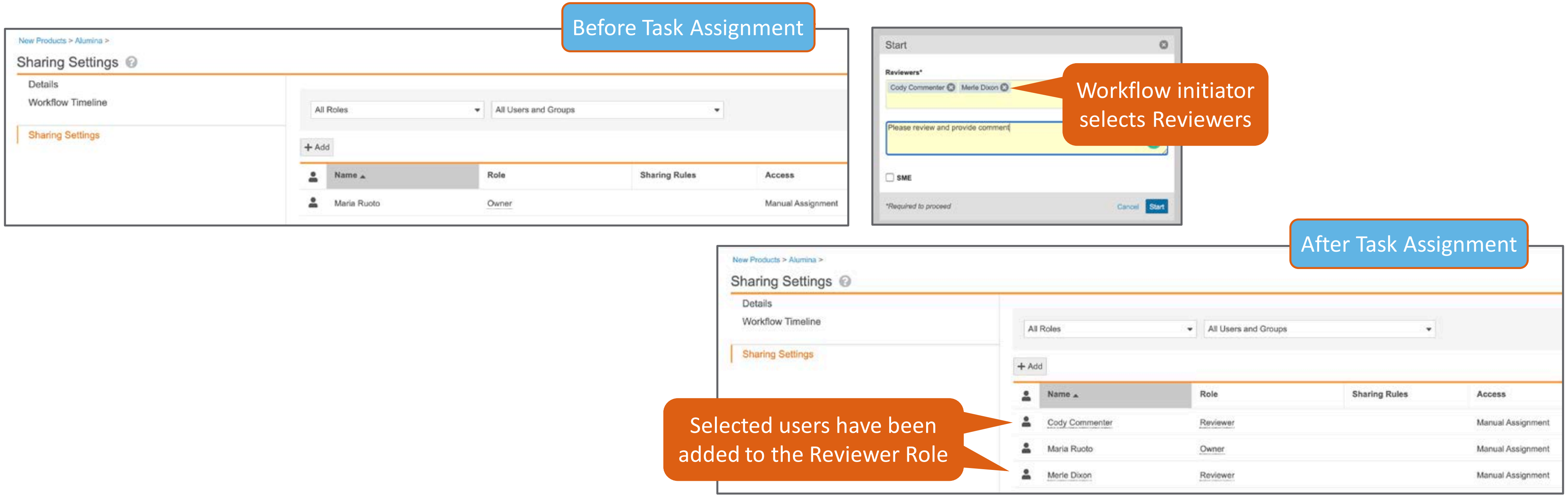
- Configuration
  - Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > [Workflow Start Step] > Edit > Default users from sharing settings





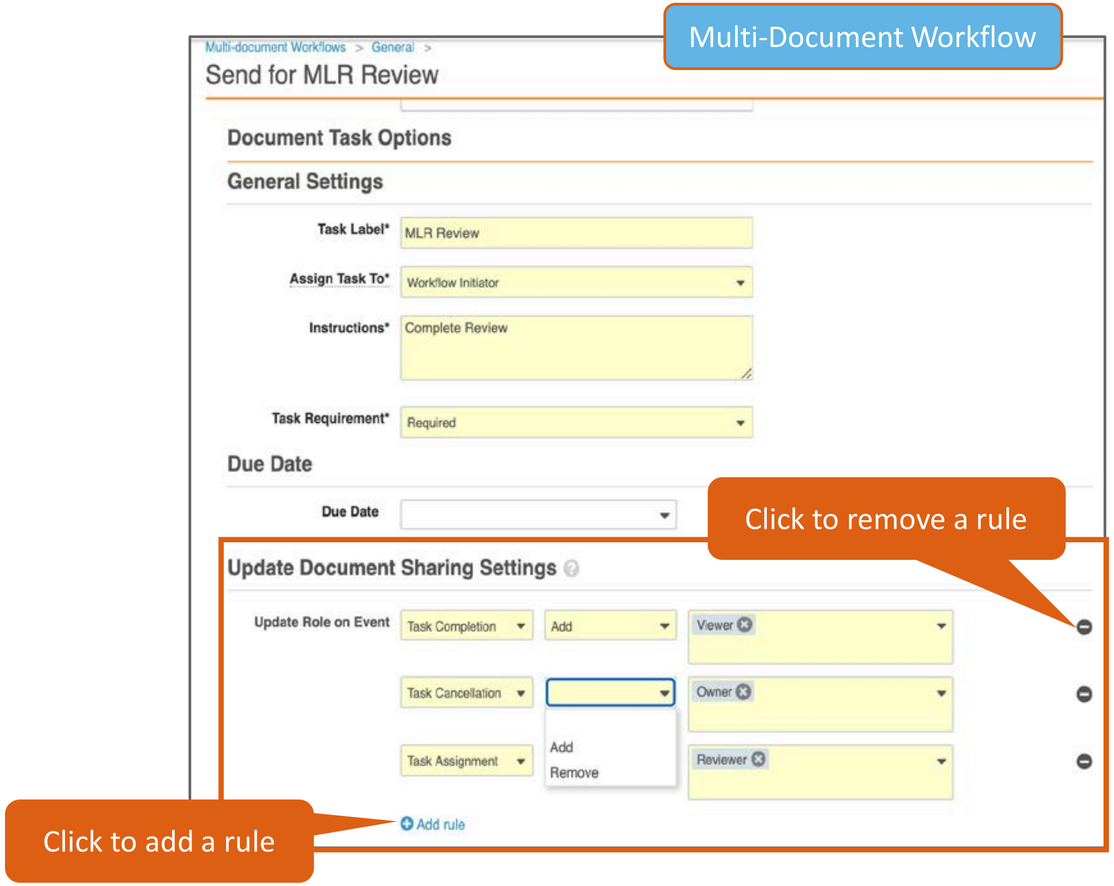
Update Sharing Settings in Task Step

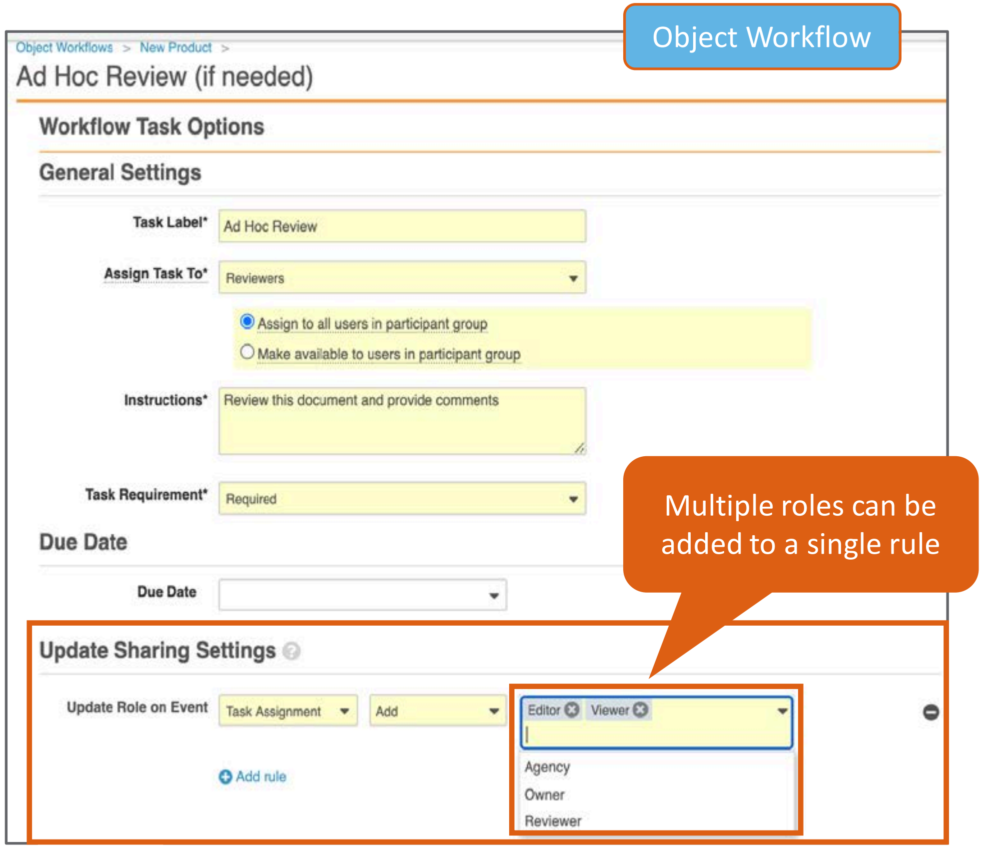
- Overview
  - Users can now be automatically added to or removed from Object or Document task roles sharing settings based on task events (task assignment, cancellation, or completion)
- Considerations
  - Multiple roles can be added to a single task step and multiple roles can be added to a single rule
  - The role must exist on the relevant Lifecycle
  - If the workflow is cancelled the sharing settings do not revert



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]

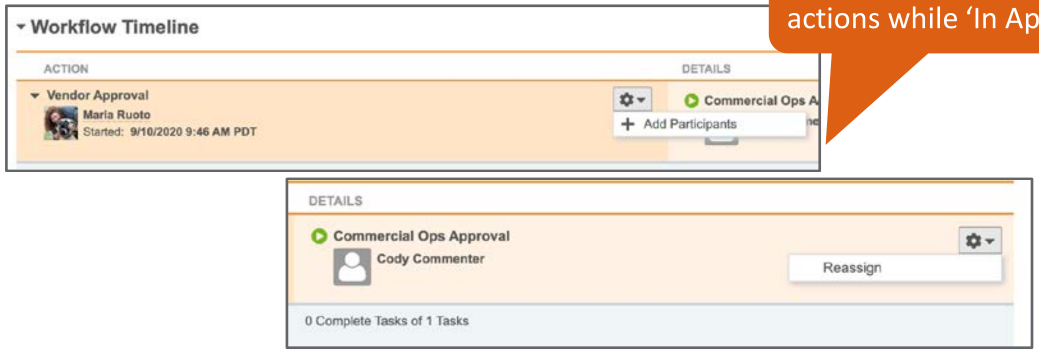




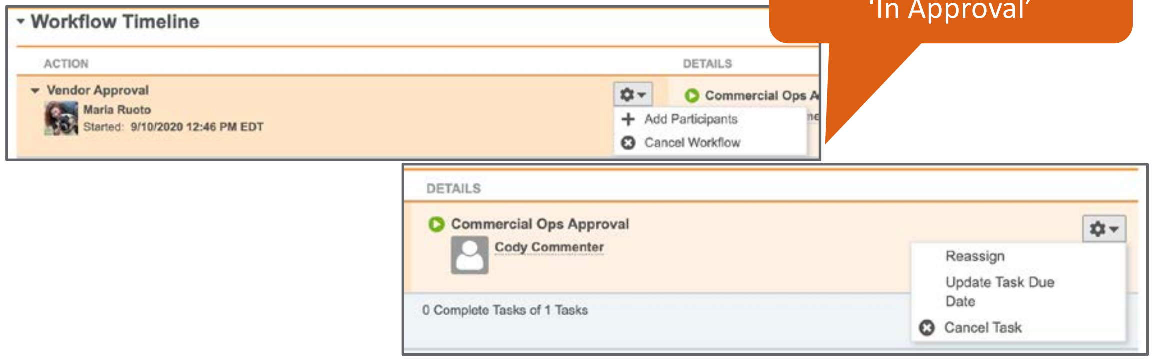
Atomic Security for Active Workflow Actions

- 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

Atomic Security: Active Workflow Actions

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

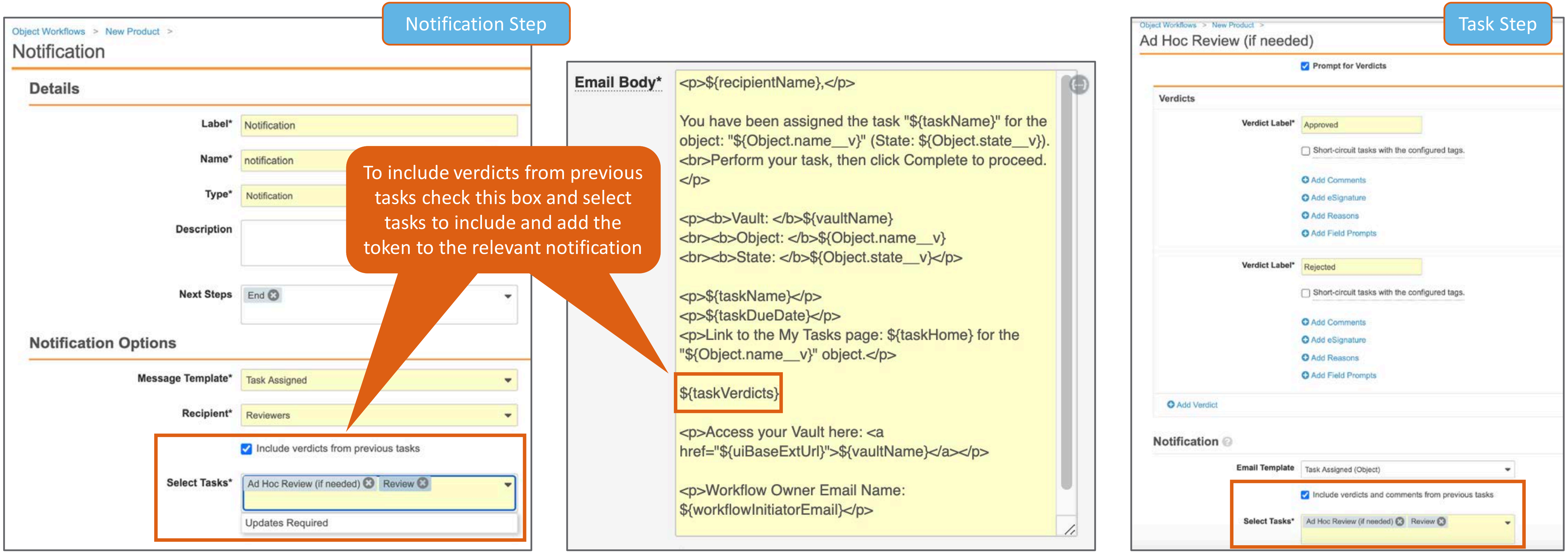
Behavior Options:
Execute: Allows users to see and click on the action
Hide: The action is never visible to users

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

Additional Task & Workflow Initiator Tokens

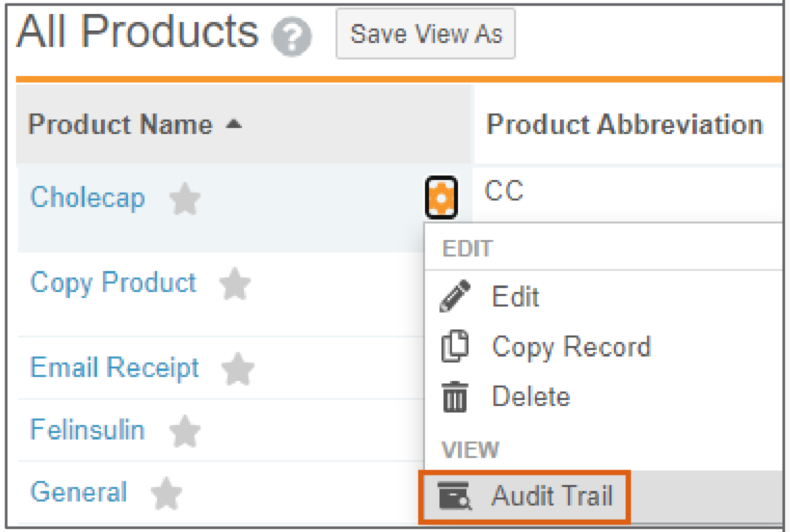
- Configuration
  - Admin > Configuration > Object Messages > [Message]
  - Admin > Configuration > [Object Workflow] > [Notification Step] or [Task Step]
  - Admin > Configuration > [Multi-Document Workflow] > [Notification Step] or [Task Step]

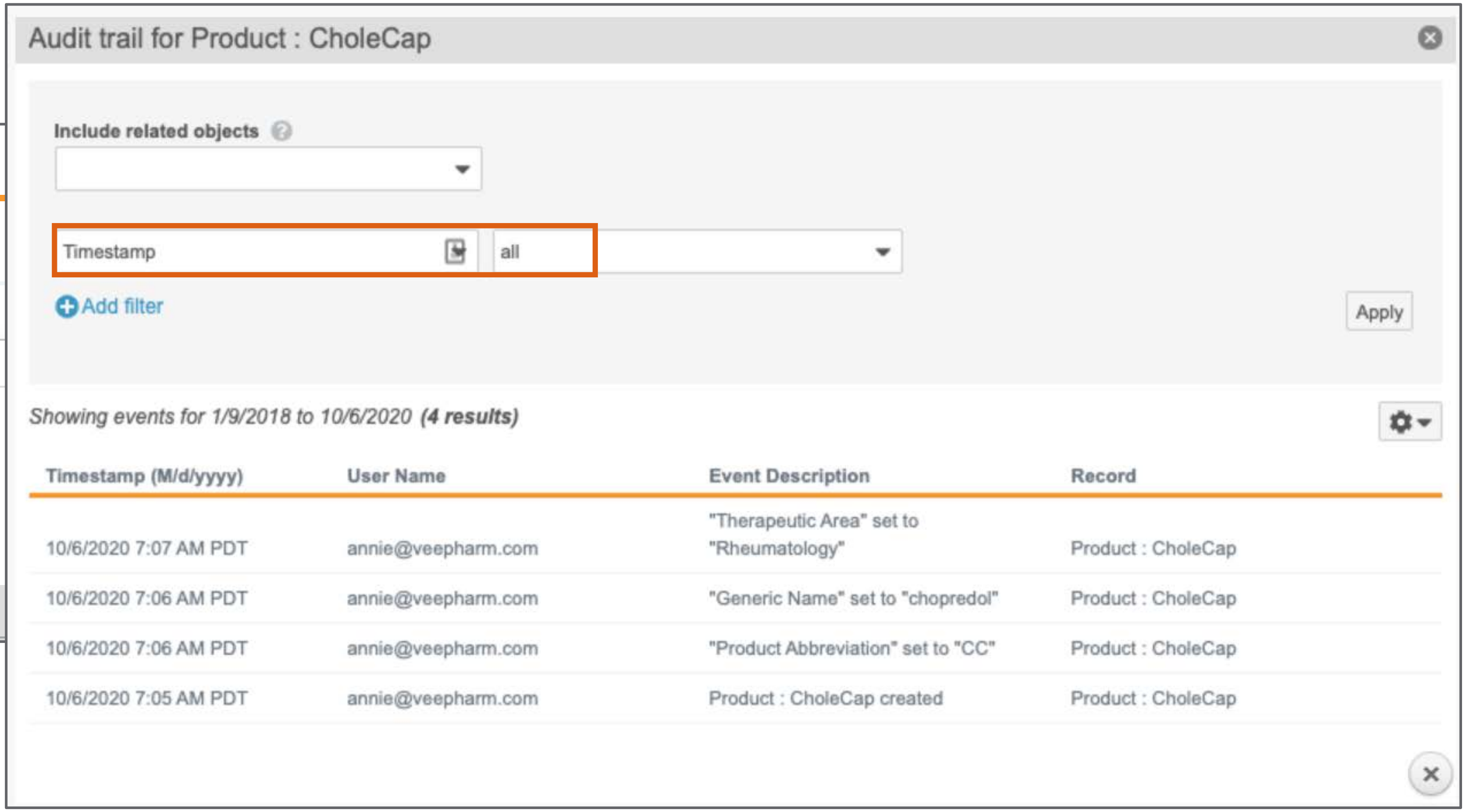


Objects

Filter by All Dates in Object Record Audit Trail

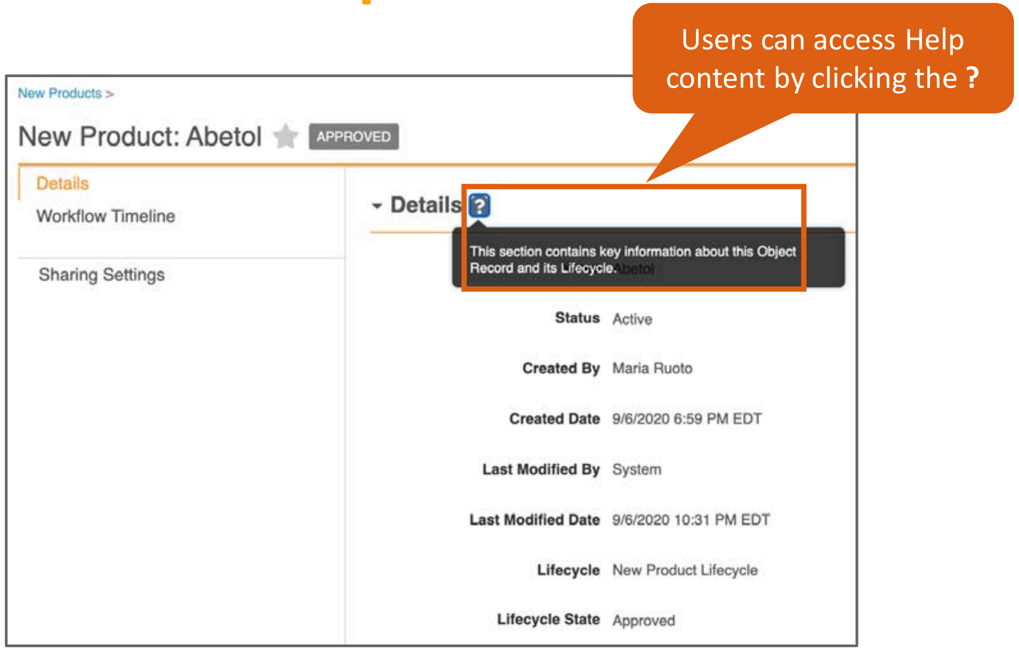
- Overview
  - This enhancement adds the ’all’ option back to the Timestamp filter in individual object record audit trails, allowing user to more easily view and export complete audit trails

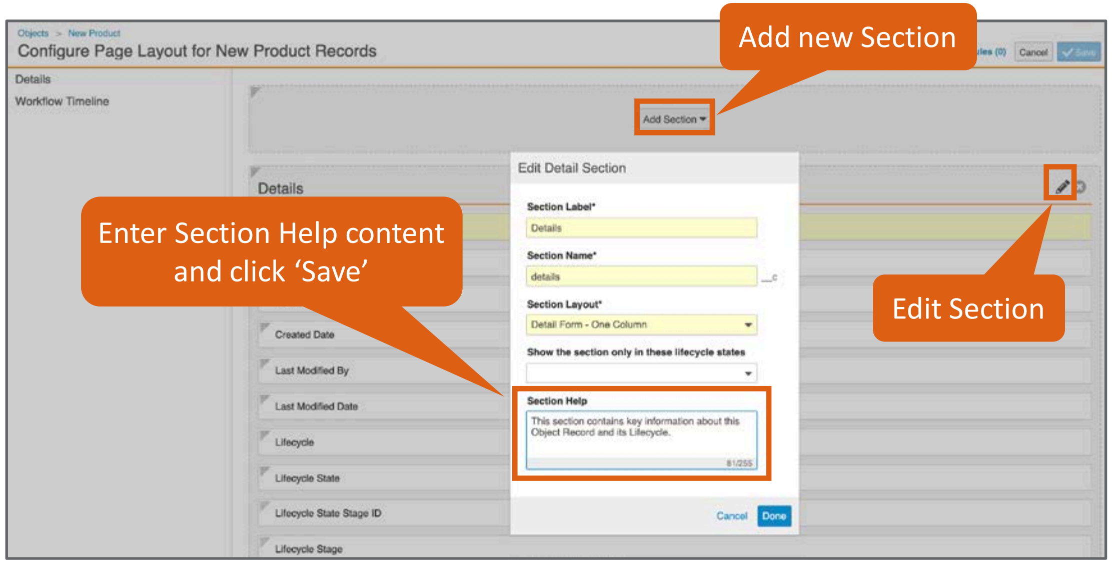




Section Level Help

- 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



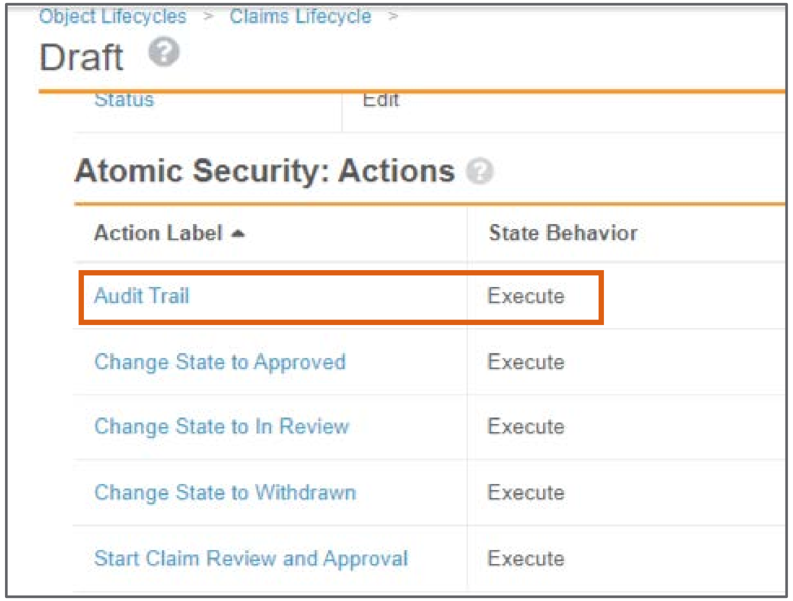


Demo

Section Level Help

Audit Action Security for Objects

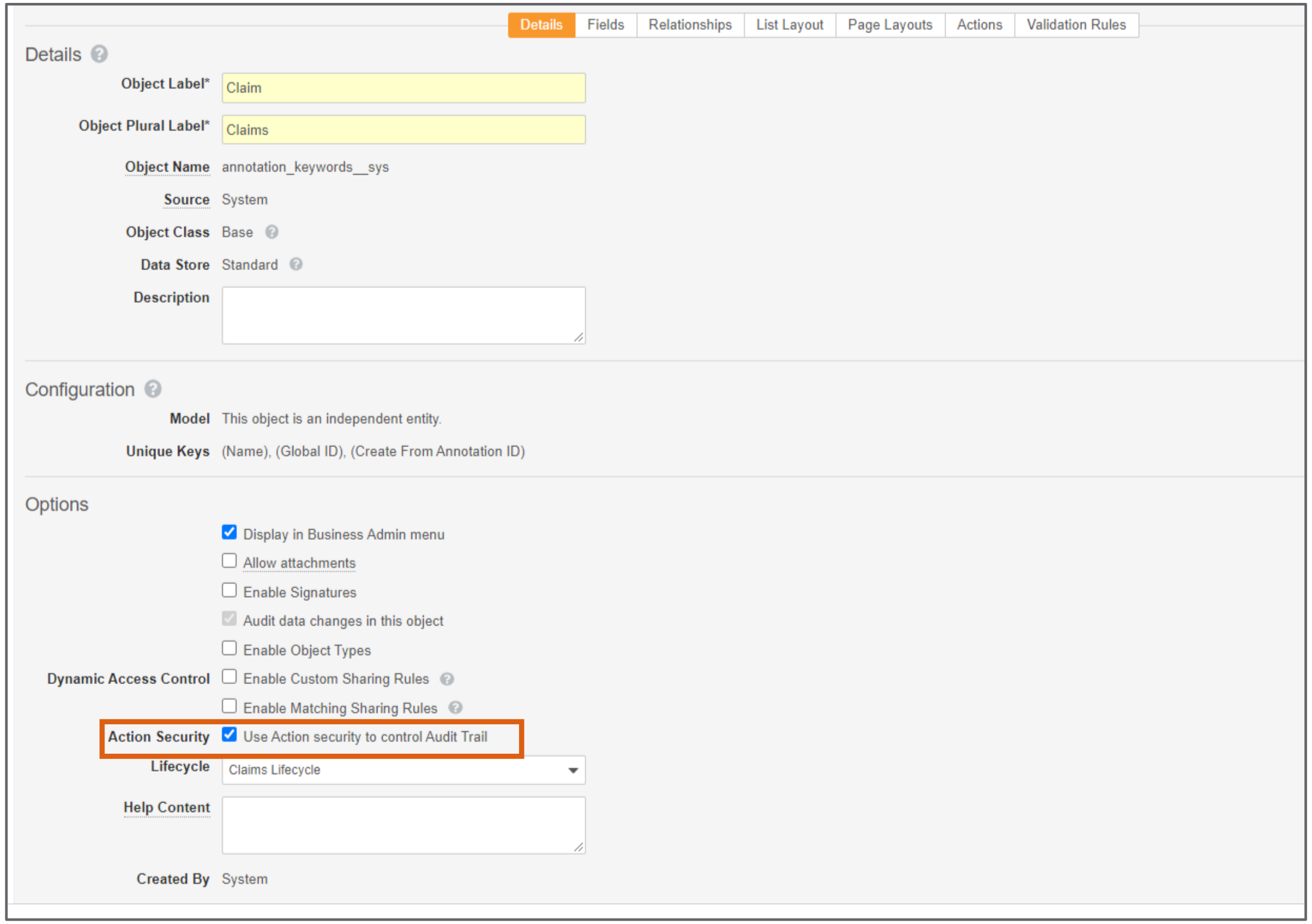
- Overview
  - Previously the object record audit trails were either all visible or all hidden based on the application permission shared with documents that applied to all objects
  - This feature allows admins to control access to the object audit trail by object, state and role via the Object Lifecycle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



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

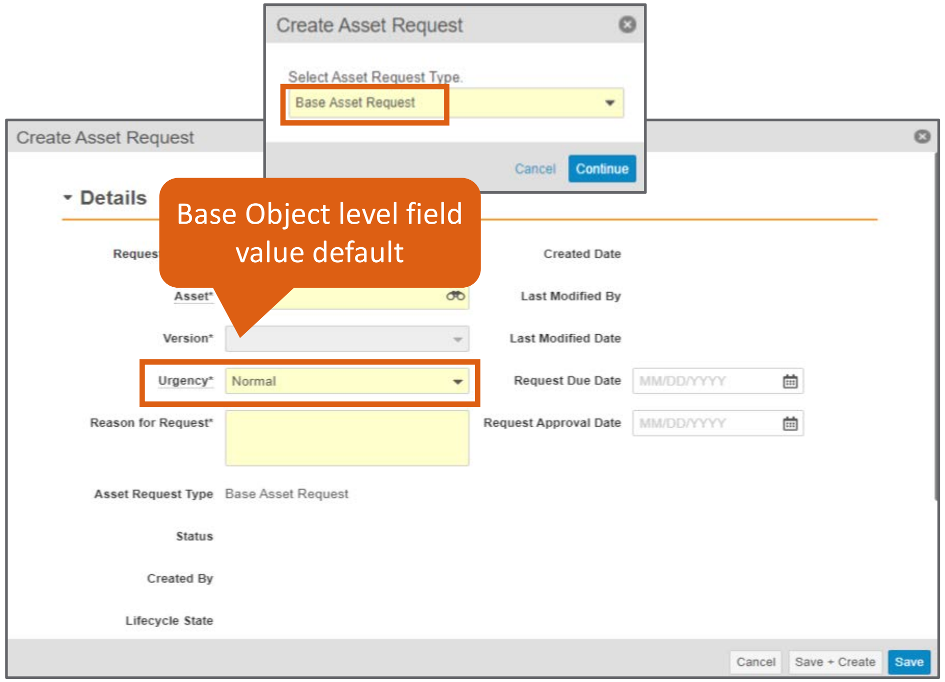
Audit Action Security for Objects

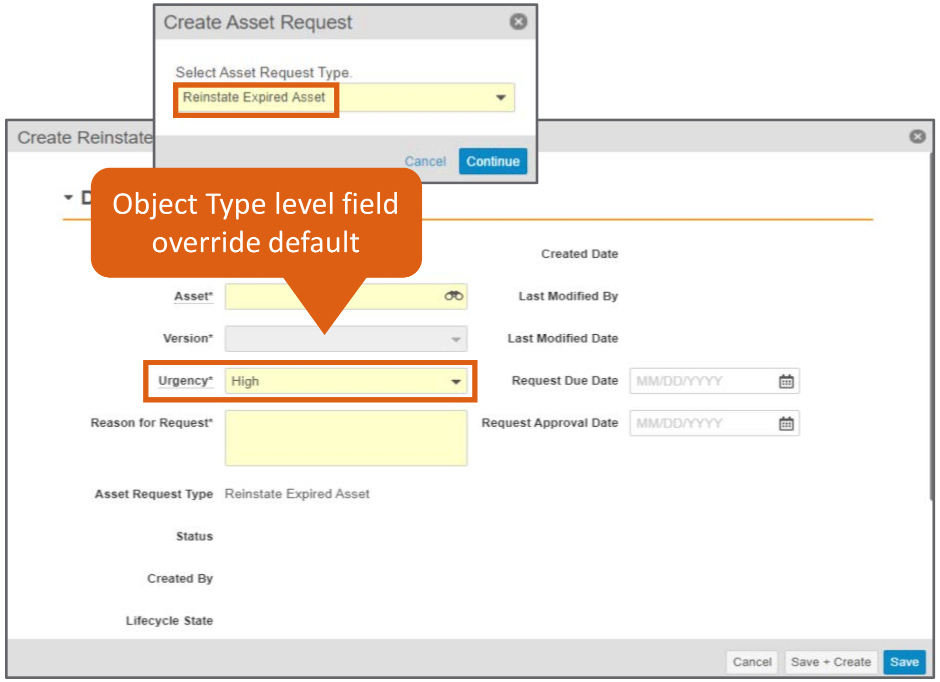
- Configuration
  - Admin > Configuration > Objects > {Object} > Details Tab > Edit Object > Options > Action Security



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

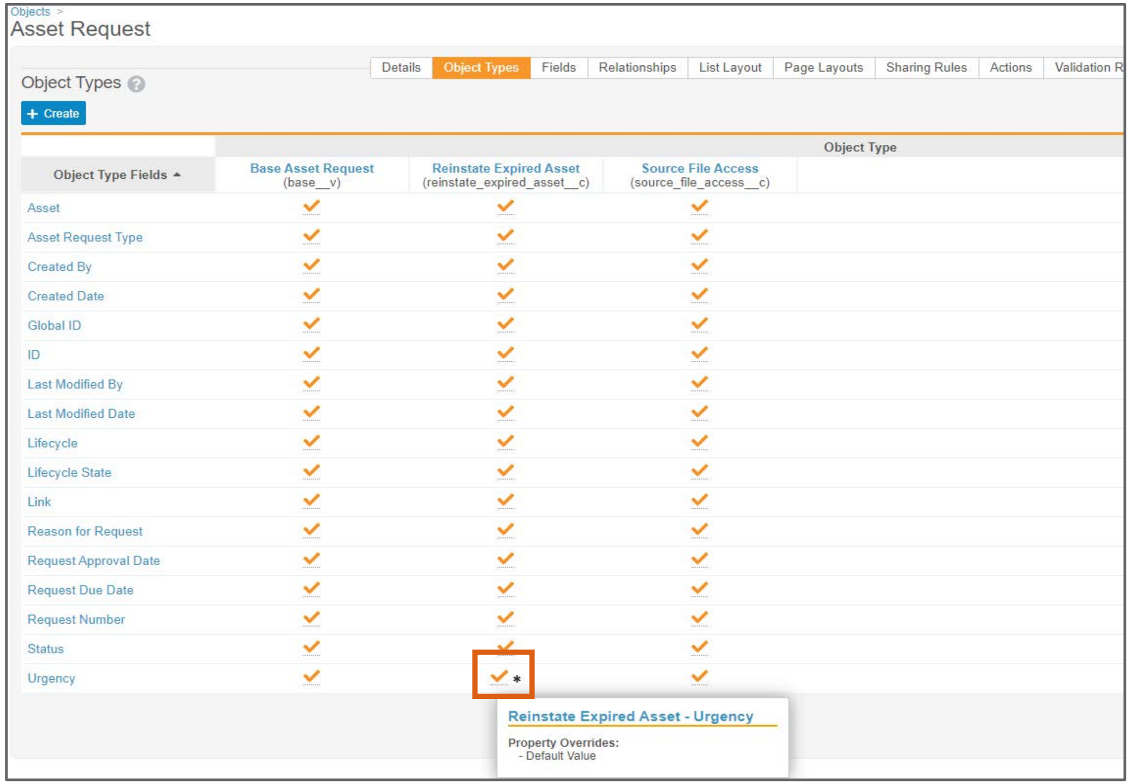


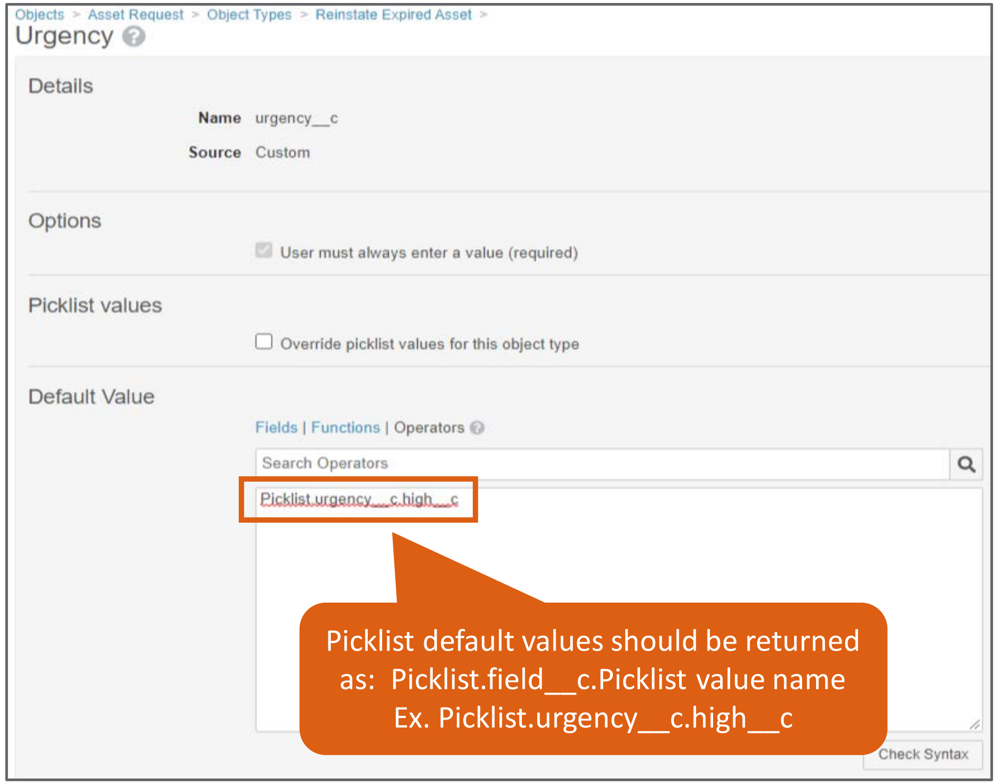


- Considerations
  - Default overrides can be defined for all field types where default values are allowed

Default by Object Type

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

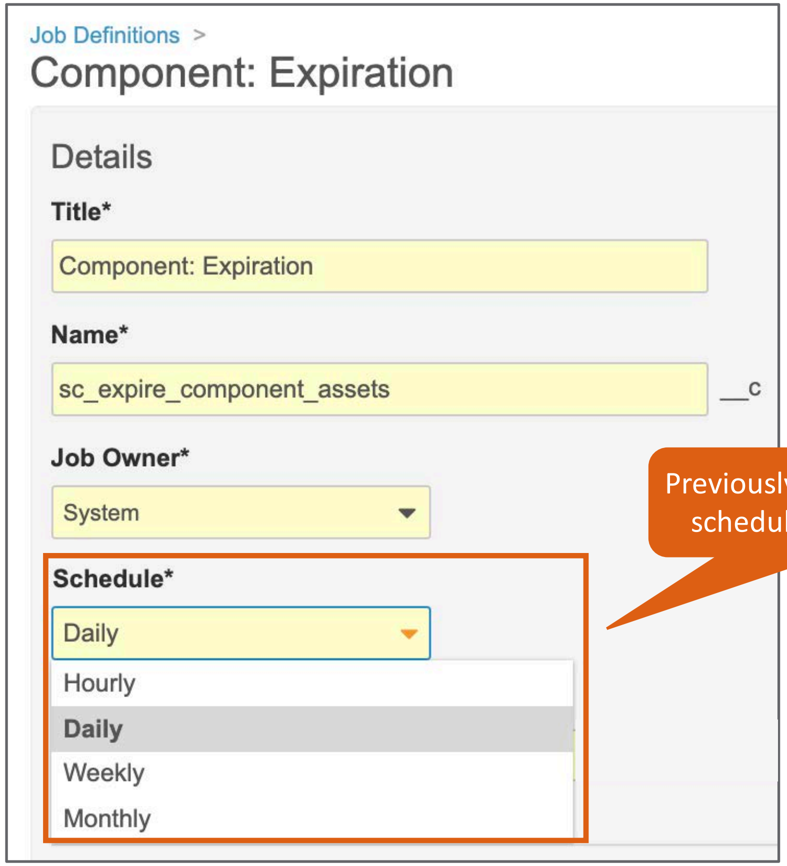




Admin

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



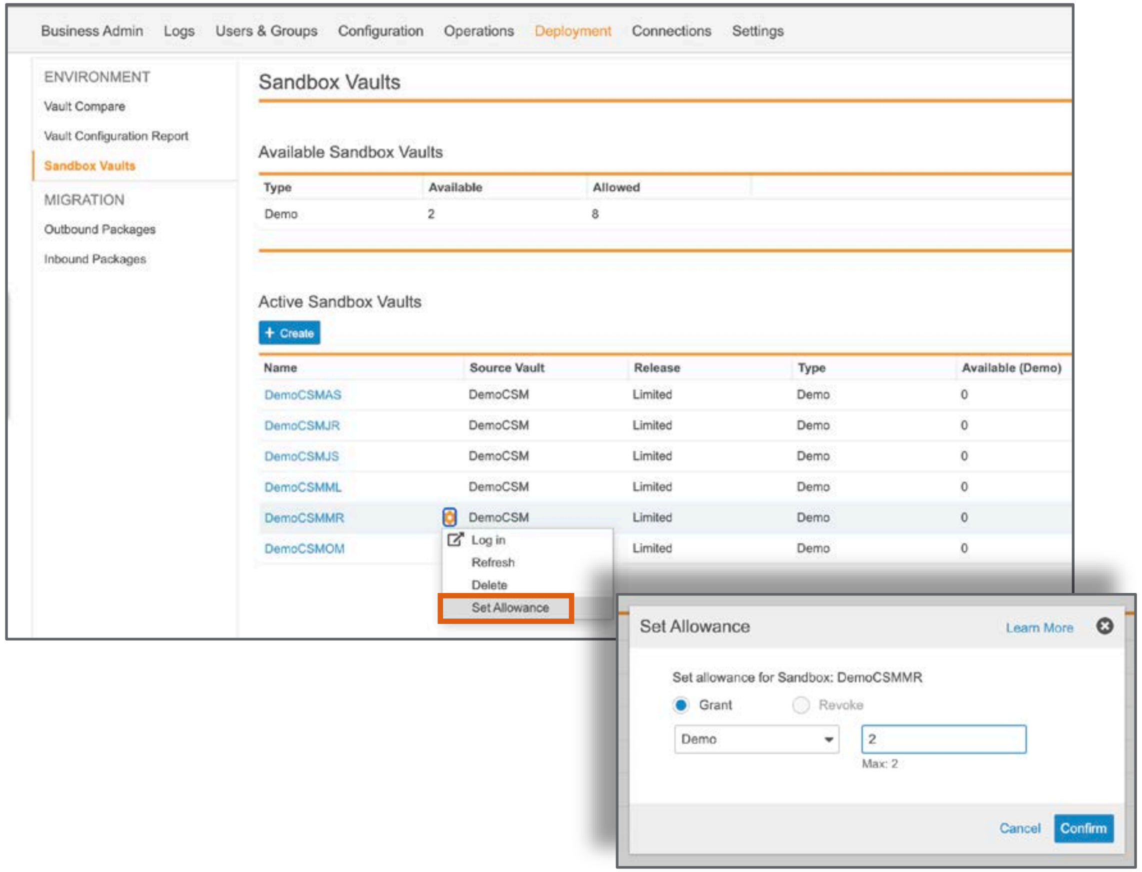
Previously, Admins could only schedule jobs to run daily

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

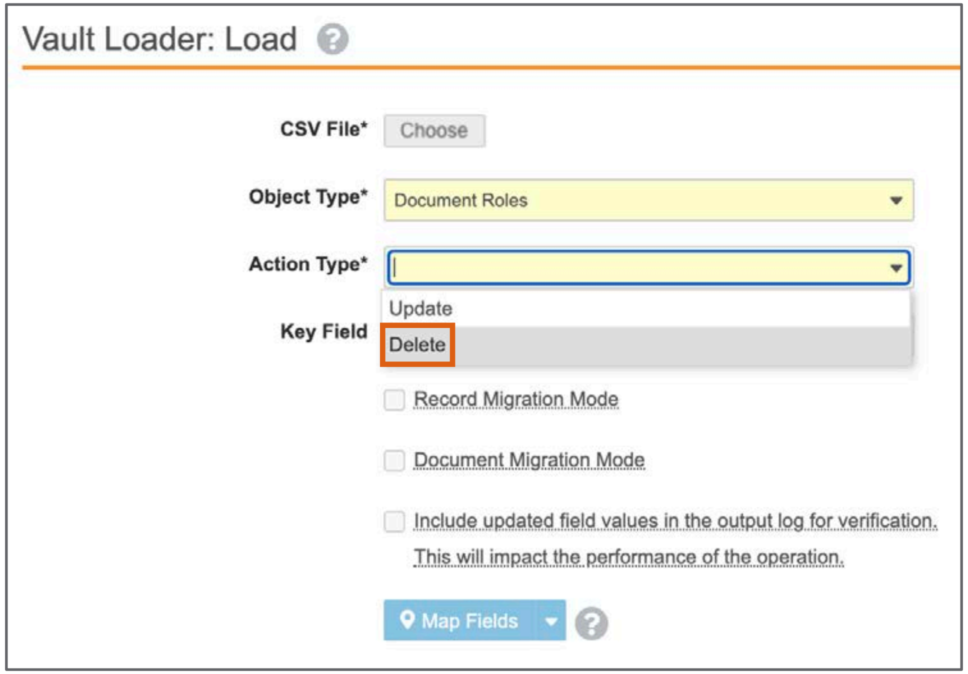
Managing Sandbox Allowances

- 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



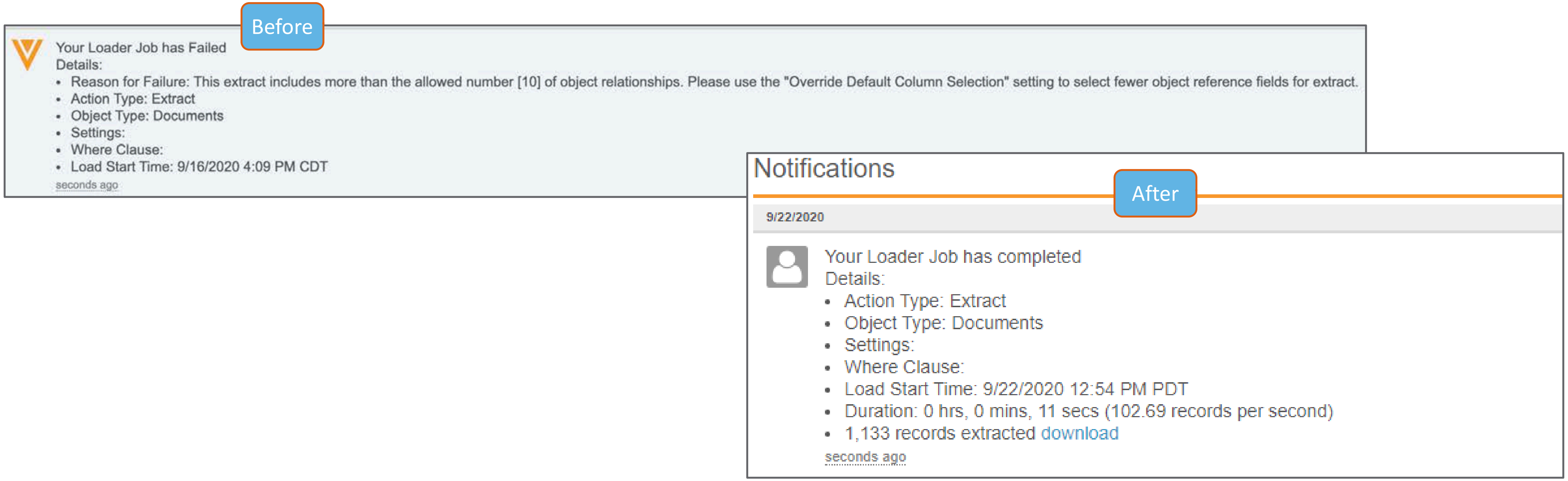
Vault Loader: Bulk Remove Users from Document Roles

- 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



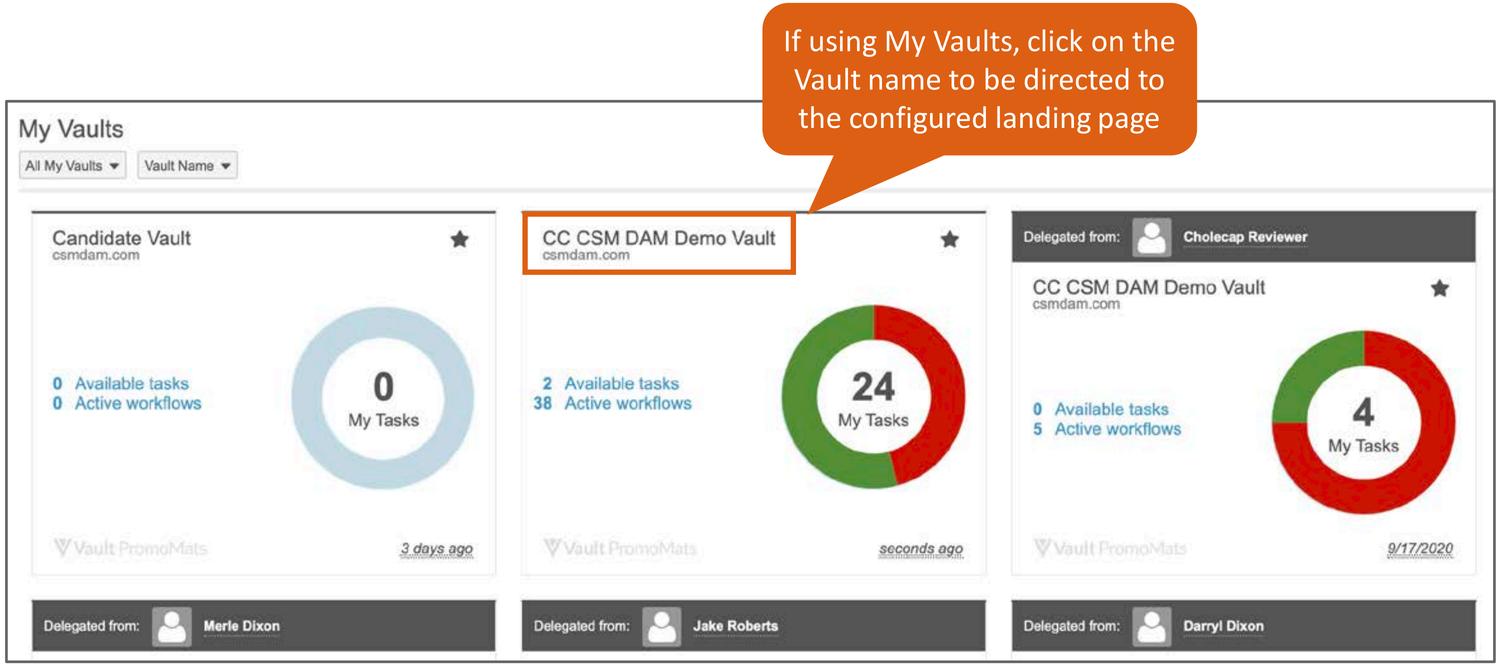
Vault Loader: Document Metadata Extract to handle more than 10 Object References

- 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



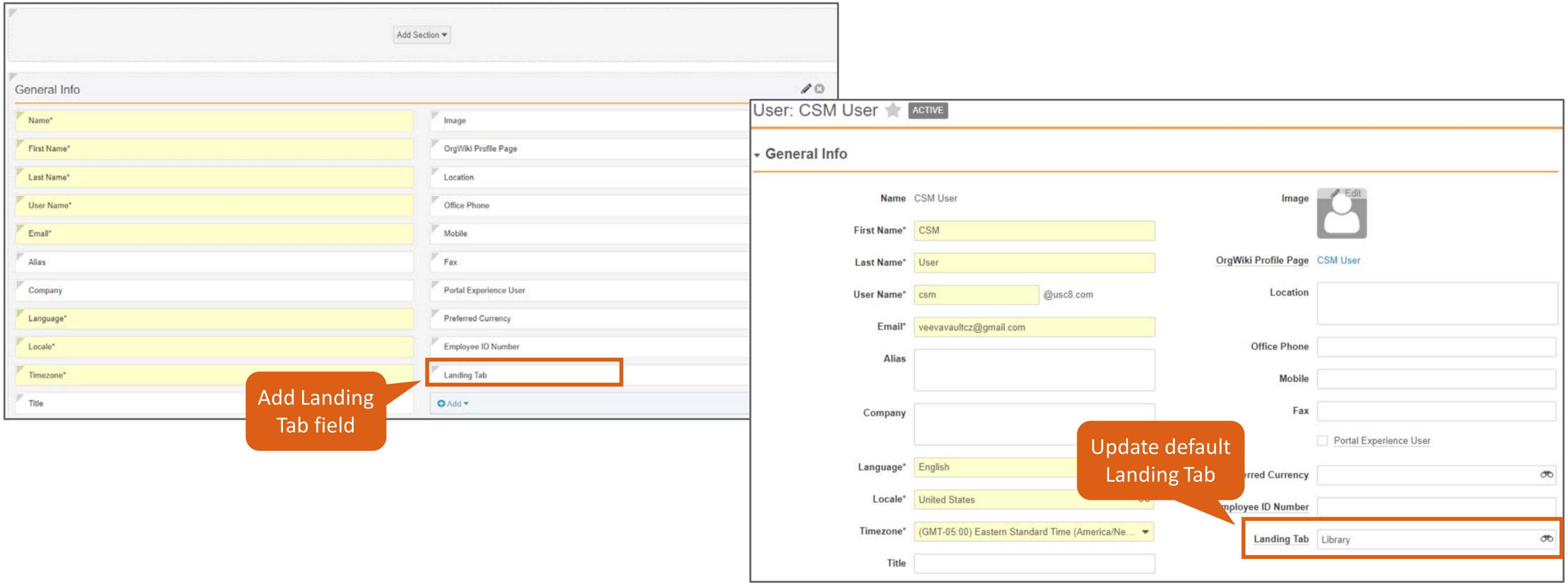
Configurable Landing Tabs

- 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



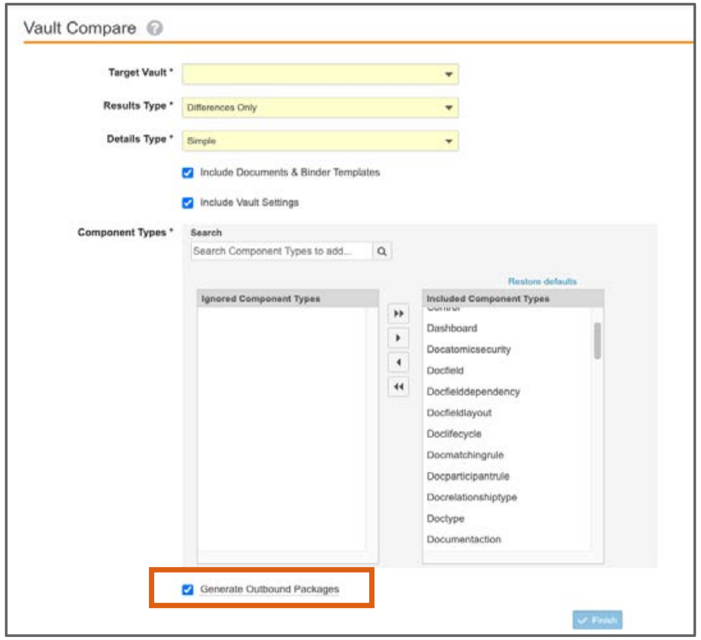
Configurable Landing Tabs

- 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



Generate Outbound Package from Vault Compare

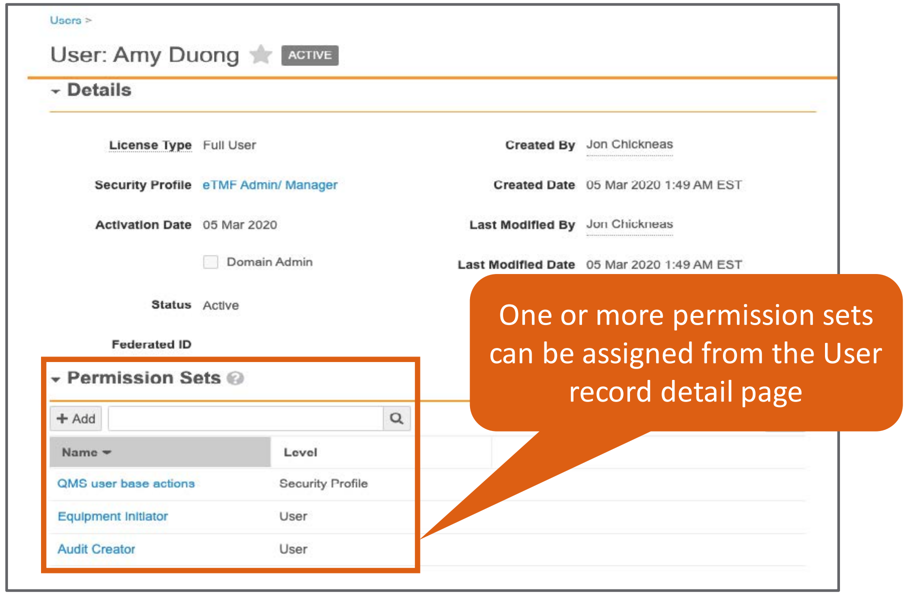
- Overview
  - This feature enhances the Vault Comparison report with an option to generate Outbound Packages based on the differences found in the Vault comparison, if components are missing or different, they will get added to the outbound packages
- Considerations
  - Each Outbound package can contain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



Appendix

User Permission Sets

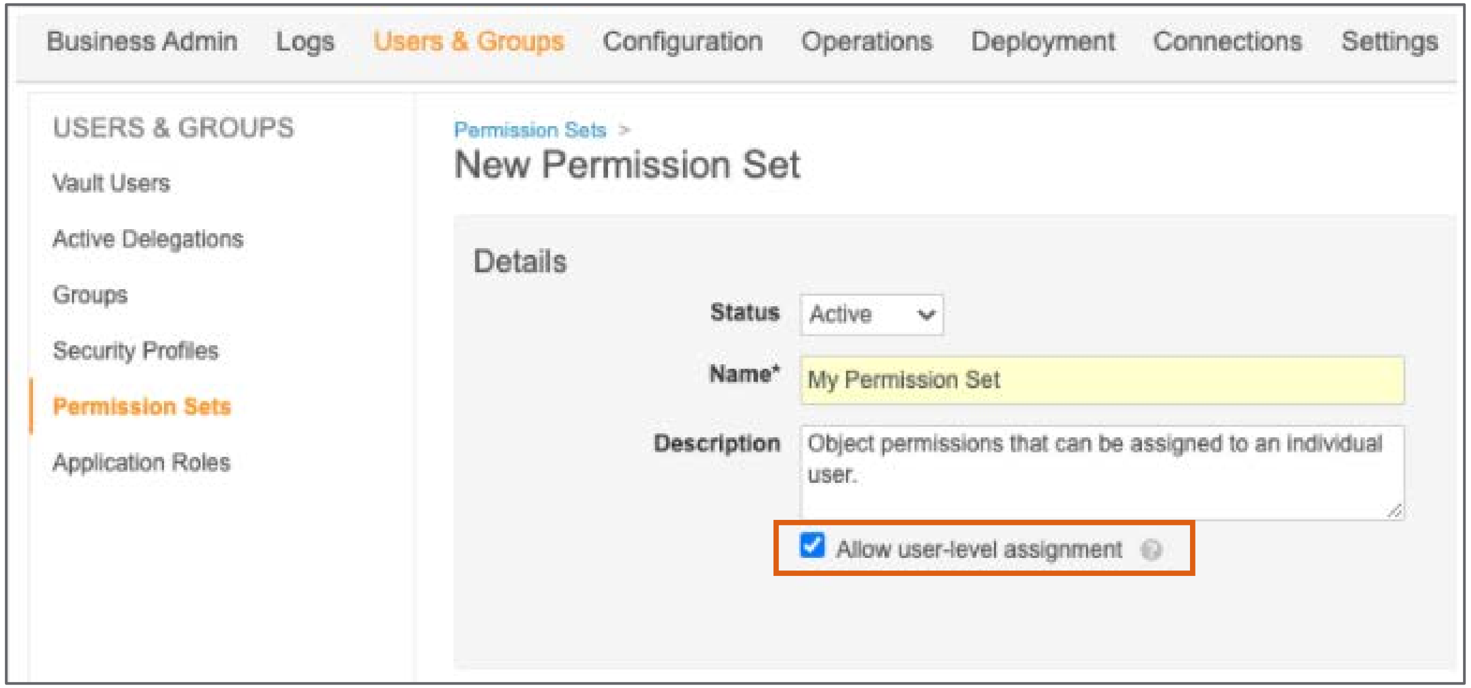
- Overview
  - When the *Allow User-level Assignment* feature is enabled the User detail page displays a new Permission Sets section allowing the Admin to assign permission sets at the individual user record level



- 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

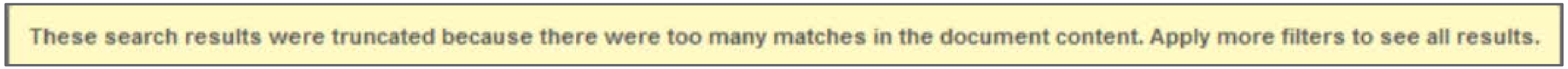
User Permission Sets

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



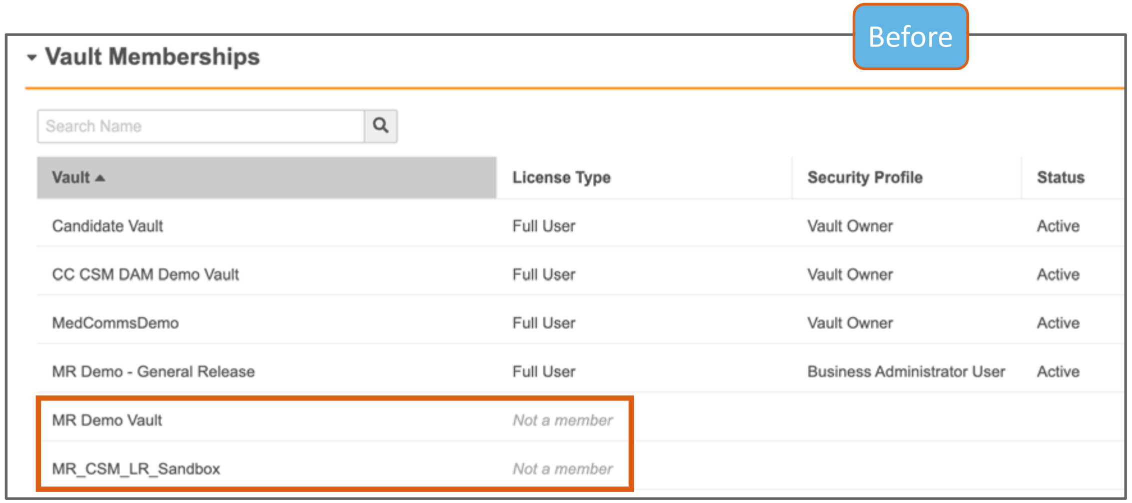
Truncated Search Result Warning

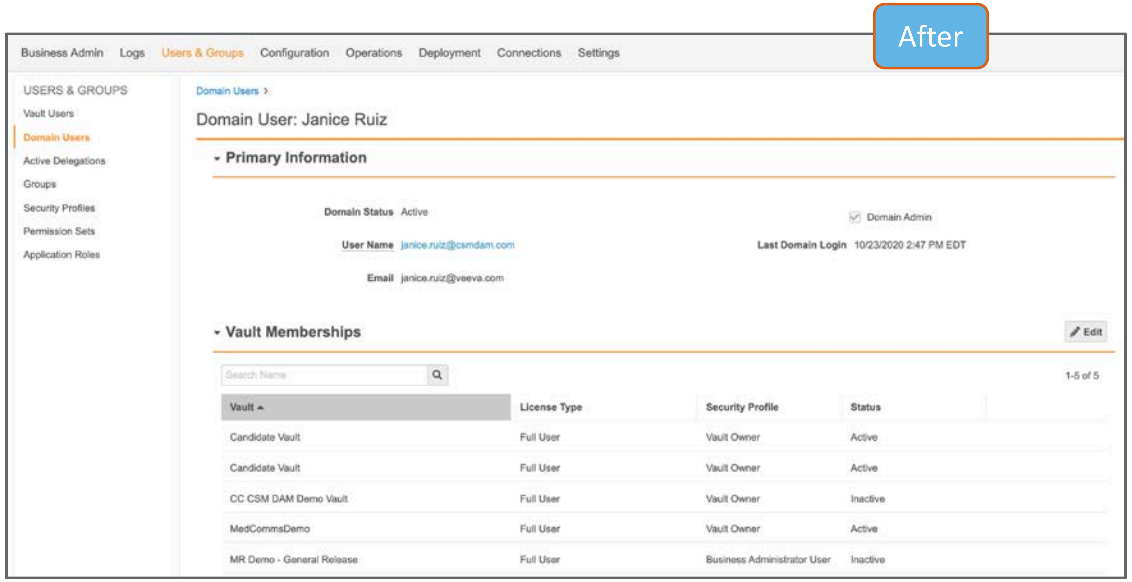
- Overview
  - This enhancement provides users with a UI banner notification when they perform a full-text search that hits the 5,000 results limit of relevant matches
  - The banner will inform the user that some of the results have been omitted
  - The user can see a complete set of results by applying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



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





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

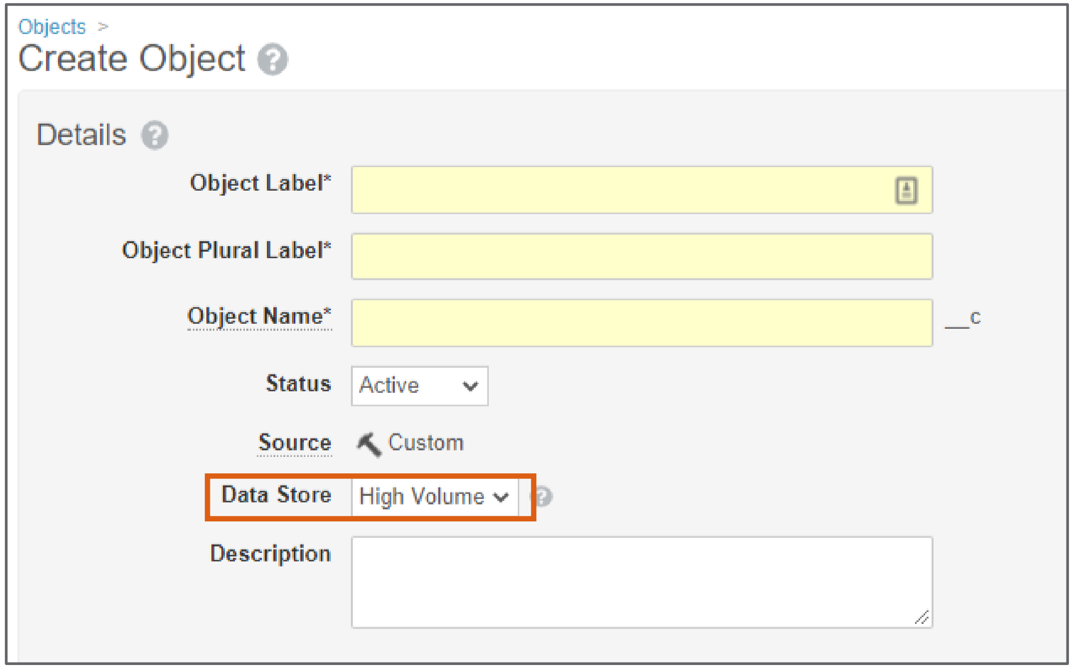
- Overview
  - Organizations can now control when the Vault File Manager automatically updates to the latest version by adding keys to the user's registry to indicate the highest version that the VFM client can update to
- Considerations
  - Setting up this option could prevent users from receiving critical 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



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

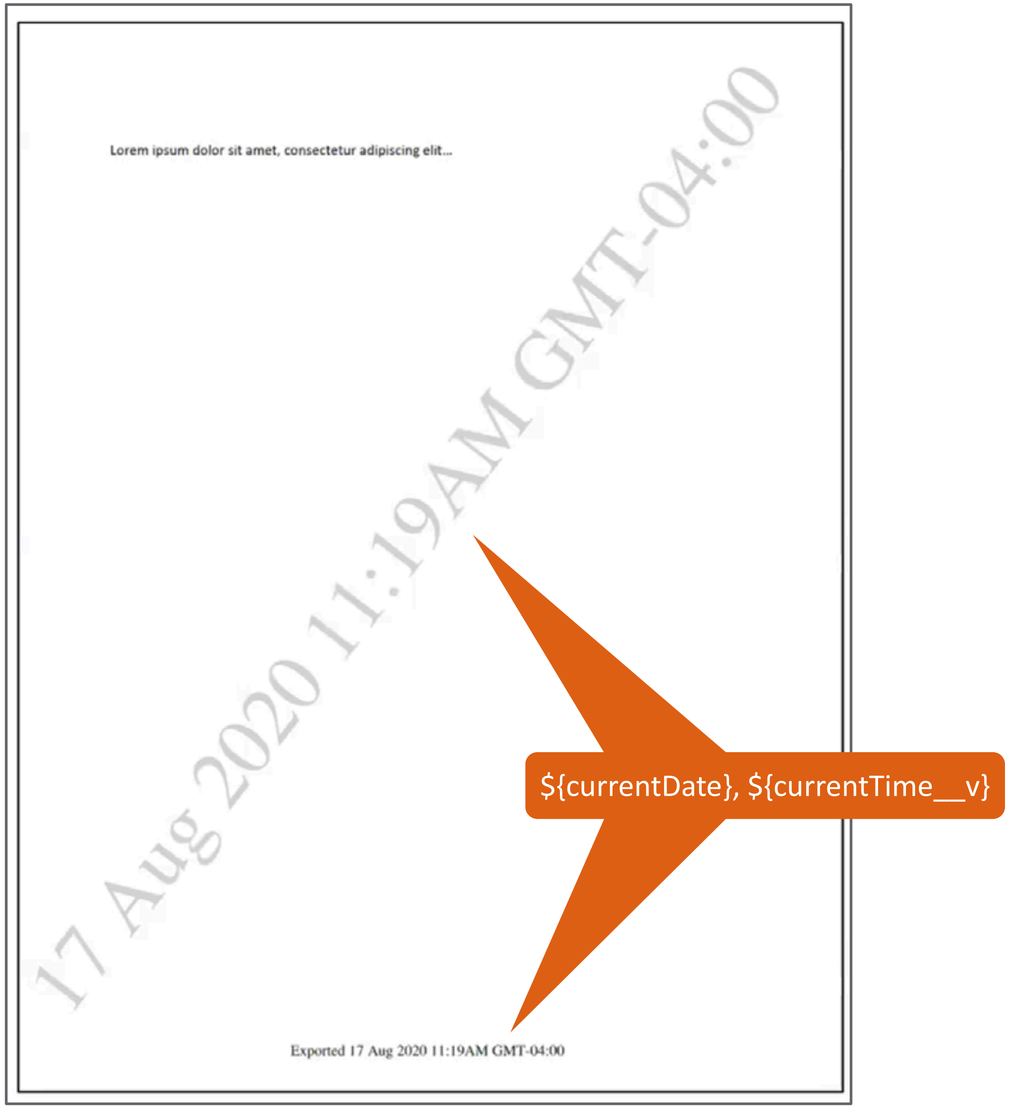
- Overview
  - This total length of a Merge Field token in Microsoft Word DOCX files has been increased to a maximum of 1,000 characters to make it easier to use referencing fields in related object records

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

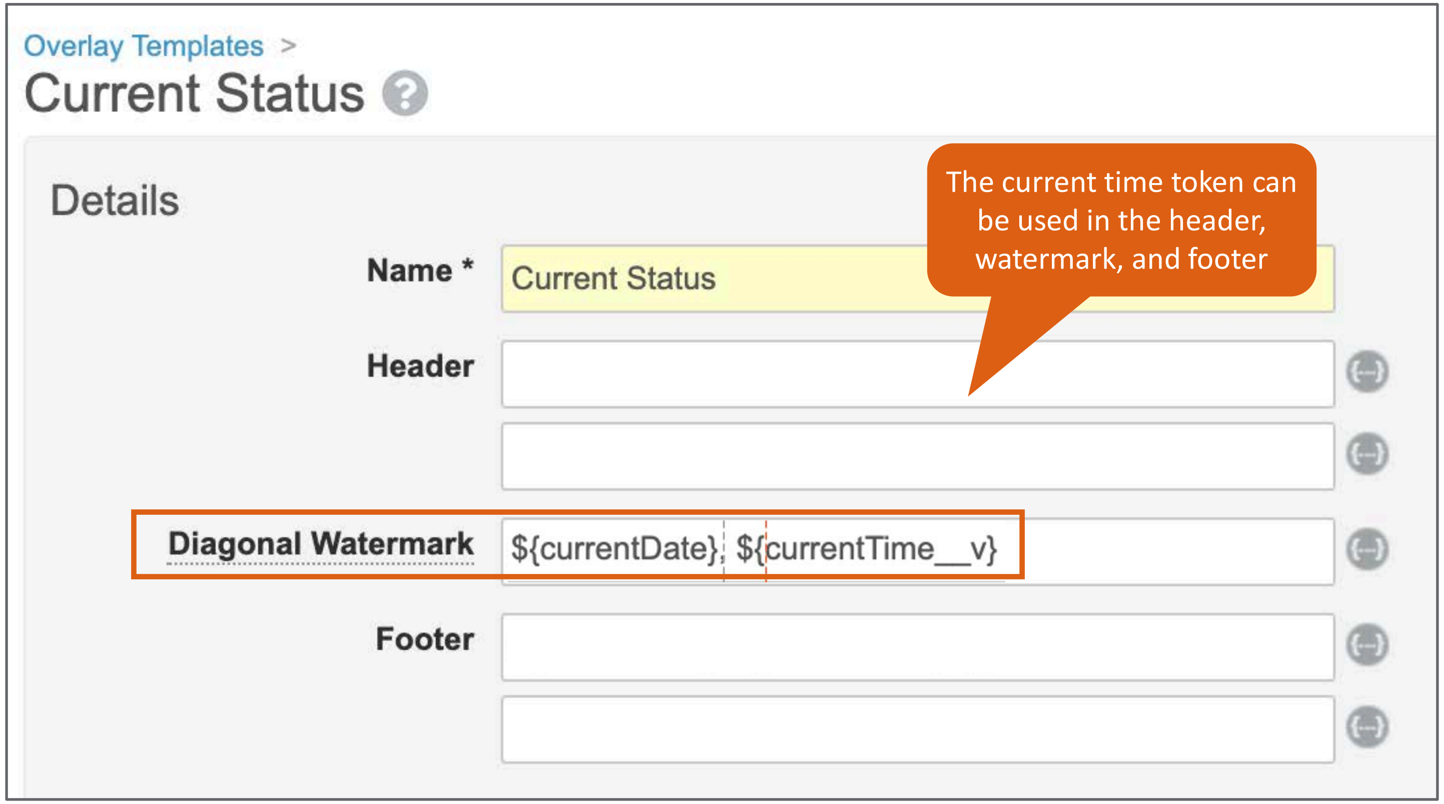
Show Current Time in Overlays

- 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 capture by utilizing the current time token along with the existing current date token

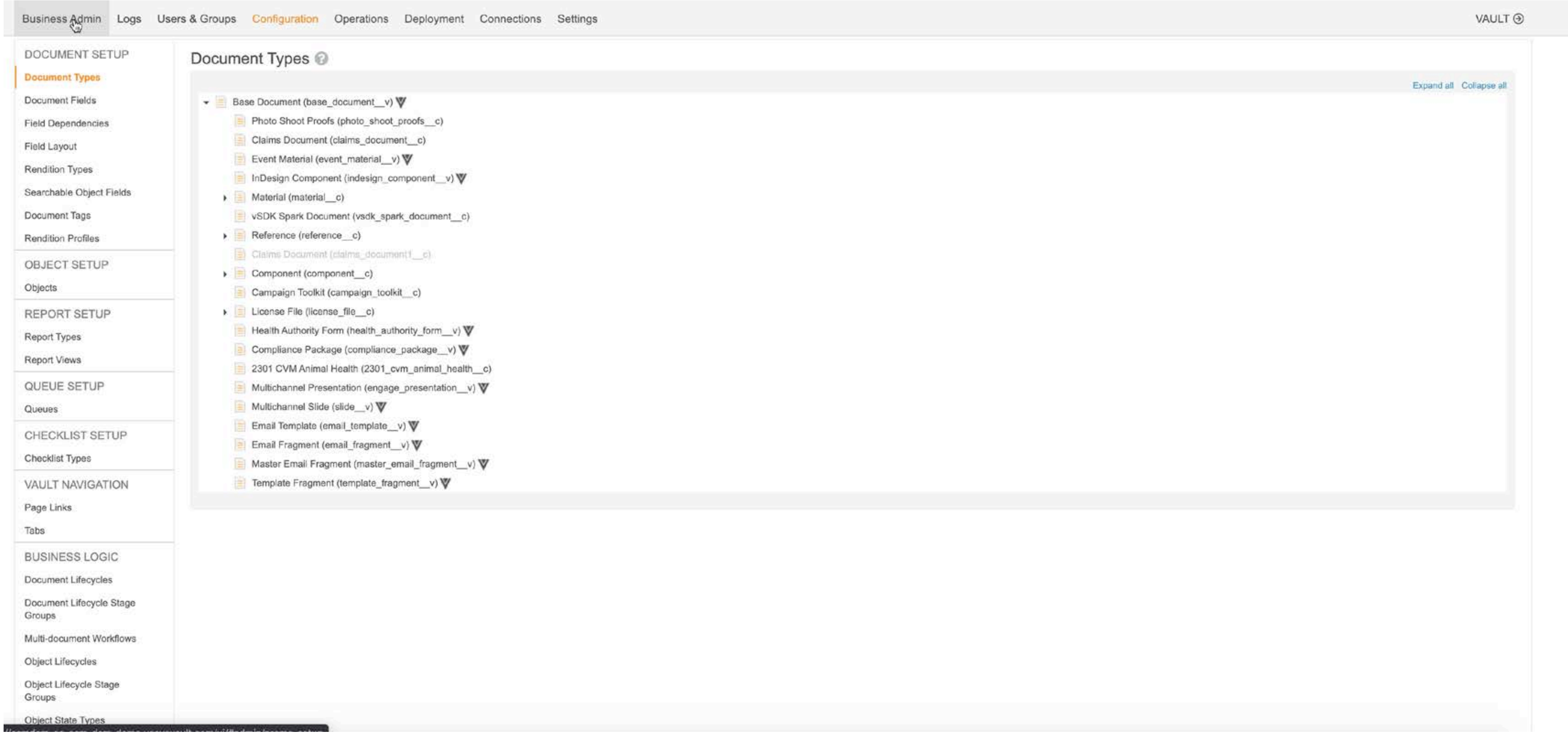


Show Current Time in Overlays

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



Show Current Time in Overlays



Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: 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