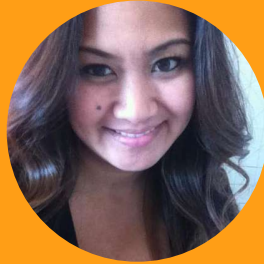


Veeva Commercial Vault PromoMats 20R3 Deep Dive

November 2020





Janice Ruiz

Manager, Commercial Content
Customer Success NA



Maria Ruoto

Senior Customer Success Manager, NA

Self Serve Recording Navigation

The screenshot shows a video player interface. On the left, there is a navigation panel with the following content:

- 20R3 PromoMats Vault Release Deep Dive (35m 37s)
- Maria Ruoto, Customer Success Manager
- CONTENT
 - 01. Veeva Commercial Vault ... 00:19
 - 02. Introduction 00:26
 - 03. Self Serve Recording Navi... 00:05
 - 04. 20R3 Key Dates 00:28
 - 05. Announcements 00:07
 - 06. EU Summit 00:23
 - 07. Atomic Security for Docu... 00:36
 - 08. eCTD Compliance Packa... 00:07
 - 09. New eCTD Requirements 00:29
 - 10. eCTD Compliance Packa... 01:03
 - 11. eCTD Compliance Packa... 00:23
 - 12. eCTD Compliance Packa... 00:16

The main video area displays a title slide with the text: "Veeva Commercial Vault PromoMats 20R3 Deep Dive November 2020" and the Veeva logo. The bottom control bar shows the video is at 00:02 / 00:19, with 1 / 82 slides. The BRAINSHARK logo is visible in the bottom left corner of the player.

- 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

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

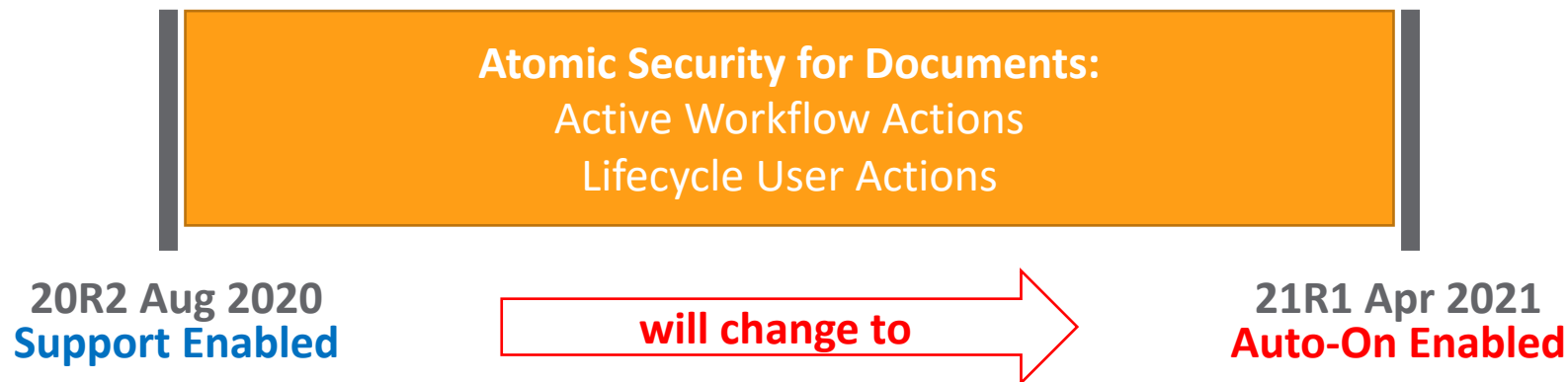
Medical

Commercial Content

Data & Intelligence



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



eCTD Compliance Package Generation

New eCTD Requirements

- By June 2021, organizations must submit the following submissions to the FDA via the electronic gateway:
 - *Postmarketing submissions* of promotional materials using Form FDA 2253
 - *Pre-Clearance* of promotional materials for accelerated approval products

**Providing Regulatory
Submissions in Electronic and
Non-Electronic Format —
Promotional Labeling and
Advertising Materials for
Human Prescription Drugs**

Guidance for Industry

U.S. Department of Health and Human Services
Food and Drug Administration
Center for Drug Evaluation and Research (CDER)
Center for Biologics Evaluation and Research (CBER)

June 2019
Electronic Submissions

OMB Control No. 0910-0870
Expiration Date: 05/31/2022
See additional PRA statement in section VIII of this guidance.

eCTD Compliance Package Generation



- This feature helps customers meet FDA guidelines by:
 - Automatically generating a new eCTD Compliance Package
 - Submission Ready Documents for Materials, References, and Labelling
 - Vault link annotations are converted to relative PDF links
 - Compliance Package Generation Support for Pre-Clearance and 2253 Submissions
- Considerations
 - Once the package has been generated in Vault, it can then be exported and submitted to the FDA through a publishing tool
 - The pre-existing Create Compliance Package bulk action will remain

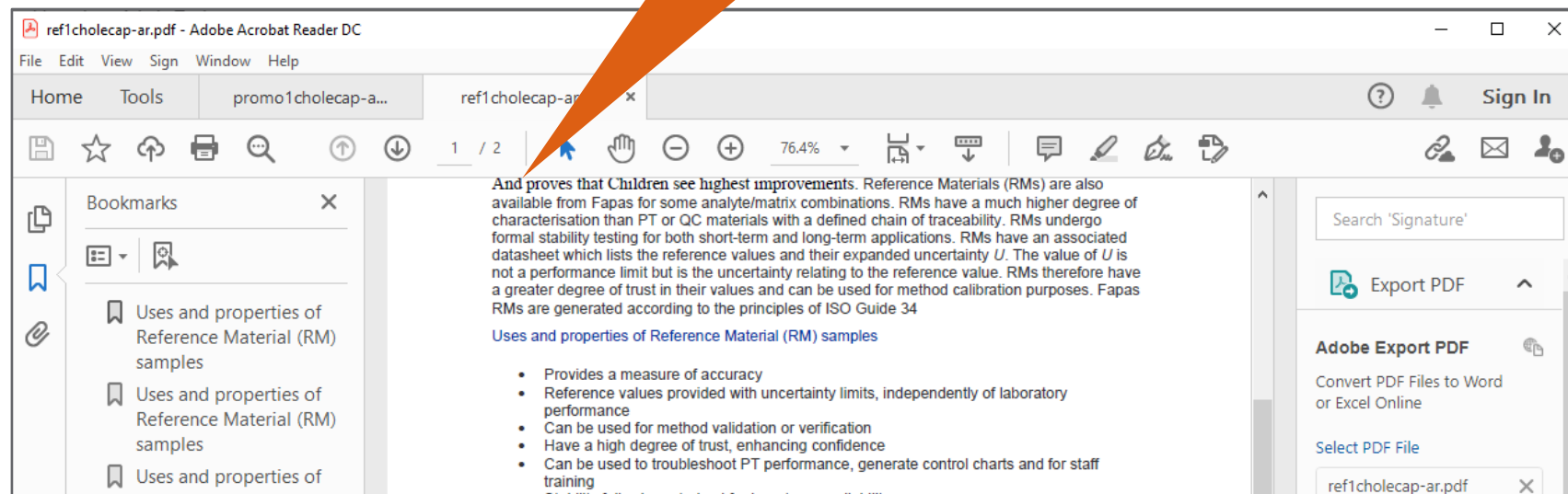
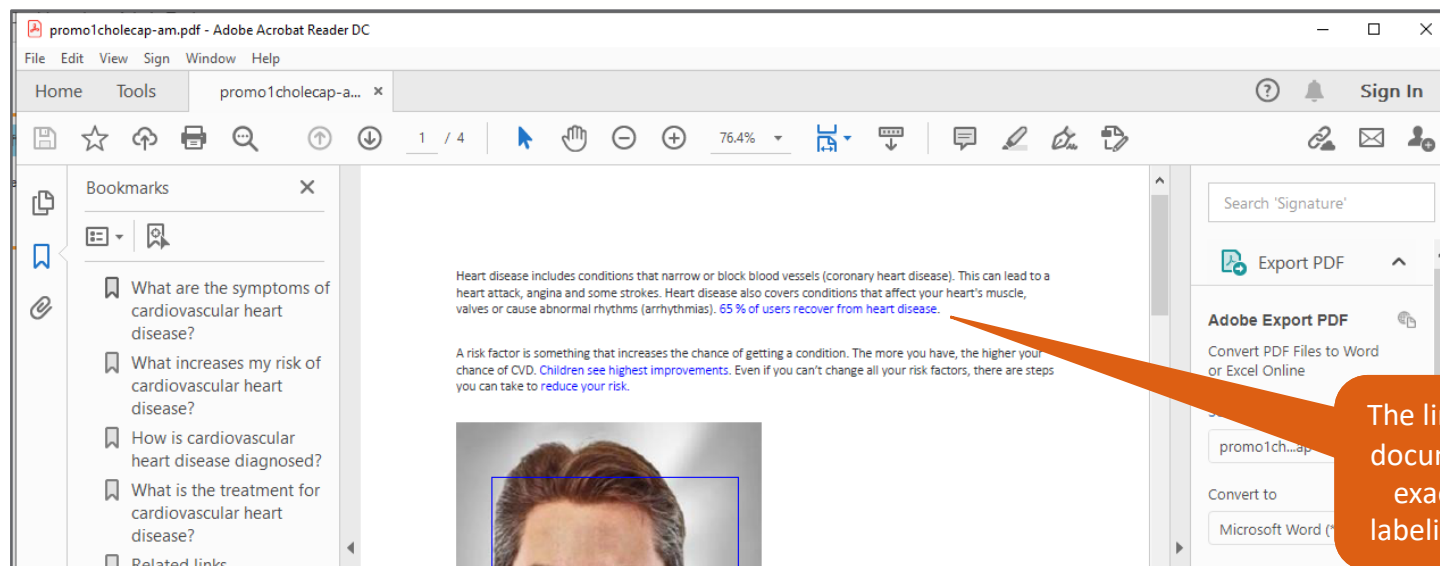
eCTD Compliance Package Generation



- The new eCTD Compliance Package Binder will include:
 - Promotional Material
 - Clean version with no Vault link annotations
 - Annotated version, with Vault link annotations converted to relative PDF links
 - Annotated labeling: Copy of PI labeling document with anchors converted to destinations
 - Annotated references: Copy of the reference material with anchors converted to destinations

Example: Pre-Clearance APLB package with 2 products and 2 promotional materials (*includes 2253 form and supplementary form as well as the annotated materials*)

eCTD Compliance Package Generation



eCTD Compliance Package Generation



Compliance Package export

Pre Clearance Cholecap WonderDrug APLB Accelerated Launch

File Home Share View

« Dow... » Pre Clearance Cholec... Search Pre Clearance Cholecap WonderDrug APLB Accelerated Launch

Name	Date modified	Type	Size
compliance_package.xml	08/10/2020 13:43	XML Document	9 KB
fda-2253-preclearancecholecapwonderdrugapl...	08/10/2020 13:43	Adobe Acrobat Docu...	1,829 KB
fda2253supplementarysheet-preclearancechole...	08/10/2020 13:43	Adobe Acrobat Docu...	975 KB
pi1cholecap-al.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	763 KB
pi1cholecap-cp.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	763 KB
pi3wd-al.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	869 KB
pi3wd-cp.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	869 KB
promo1cholecap-am.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	106 KB
promo1cholecap-cm.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	105 KB
promo3wonderdrug-am.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	79 KB
promo3wonderdrug-cm.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	74 KB
ref1cholecap-ar.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	54 KB
ref2cholecap-ar.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	54 KB
ref5wd-ar.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	172 KB
ref6wd-ar.pdf	08/10/2020 13:43	Adobe Acrobat Docu...	172 KB



eCTD Compliance Package Generation



- Considerations

- The Regenerate Compliance Package user action allows users to regenerate the Compliance Package
- The Set binder content state type entry action updates all documents in a binder to match the binder state
- The Binder Content entry criteria verifies that all documents are in a specified state before the binder moves to the next state
- The Submission Ready workflow VPK allows users to send the generated Compliance Package binder through its lifecycle until it reaches Steady state
- This feature also allows Vault to automatically add video and audio files to the Compliance Package if the video/audio file is attached to the Promotional Piece as a Final Video/Audio rendition type
 - Two Submission Ready copies of the clean material are now generated automatically
 - One copy of the document
 - One video or audio file
- The new eCTD functionality is not auto-on
 - To use the new functionality there will be *moderately* complex configuration required
- The existing PromoMats eCTD functionality will remain available in parallel

- Learn more about [eCTD Compliance Packages](#)





Auto-Claims Linking



Simple Version Binding on References in Claims

- Overview

- Vault no longer removes references from Claims when the targeted document is up-versioned
- You can now reference an approved document (ex. Approved ISI) in a Claim, then begin draft and review of a subsequent version, knowing that existing references in Claims will remain in place

- Considerations

- Other events can still remove references from Claims, including making the document obsolete, deleting the referenced anchor, deleting the referenced version, deleting the document, or changing configuration to make the document's type ineligible for referencing by Claims.

Claim: CL-000167 ★ APPROVED Edit ⚙️

Draft ➤ In Review ➤ **Approved** ➤ Expired

Details

- References (1)
- Match Text Variations (0)
- Where Used
- Workflow Timeline

Sharing Settings

References

+ Add

1-1 of 1 ⚙️

Name	Reference Type	Document Version	Reference	Created By	Created Date
LT-000261 ⚙️	Document	Cholecap ISI (v1.0)	(document)	Jim McGough..	9/24/2020 6:49 AM HST

Match Text Variations

Where Used

Workflow Timeline

Cholecap ISI (v1.0) 🔗 ★

APPROVED FOR USE

REF-00005

Cholecap

Reference > Data on File

Last modified by System
10/16/2019



Where Used Enhancements

- Overview

- This enhancement provides additional details to users when they are viewing the Where Used table on a Claim record by adding two columns to the Claim's Where Used component:

- *Document Number*: Displays the document number of the document where the Claim is used
 - *Document Status*: Displays the lifecycle state of the document where the Claim is used

- Considerations

- Users can also choose which columns are displayed

The screenshot shows a 'Claims >' page for 'Claim: CL-000011' with an 'APPROVED' status. The 'Where Used' section is expanded, showing a table with the following data:

Name	Number	Status	Suggested	Pending
Cholecap Leaflet (2.0)	Mat-LB-10015	Approved for Distribution	2	0
Patient Information Leaflet - InDesign Package Folder (1.0)	Mat-LB-10015	Superseded	1	0
Patient Information Leaflet - US Version (2.0)	Mat-LB-10013	Submit to Health Authority	2	0
Patient Information Leaflet - US Version (1.0)	Mat-LB-10013	Approved for Production	1	1

A callout box points to the 'Edit Columns' option in the table's view menu, with the text: 'Select columns to display by clicking 'Edit Columns''.

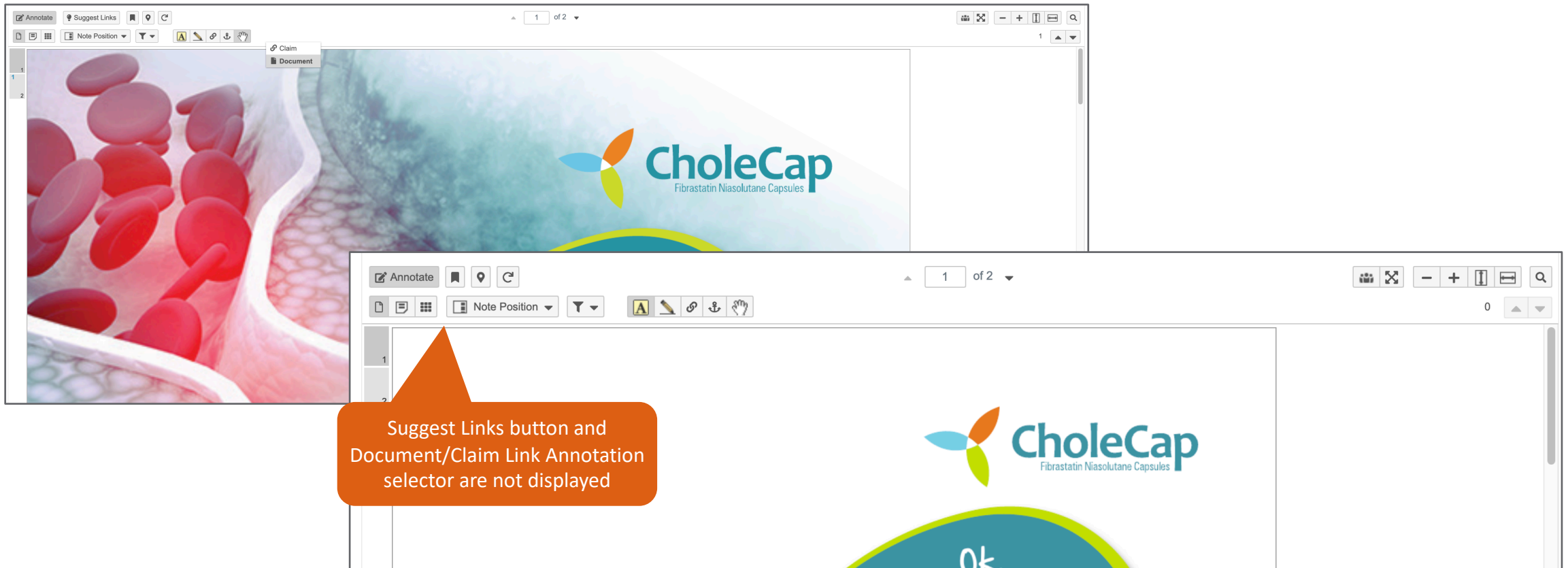
- Learn more about the [Where Used component](#)

Hide Suggest Links Button When No Matching Claims Exist



- Overview

- Vault will no longer display the *Suggest Links* button or Document/Claim Link Annotation selector on documents when no matching approved Claims match the Product and Country fields
 - If your content has a Country and/or Product that matches an approved Claim with the same Country and/or Product, the Suggest Links button will be visible even though you have no Match Claims text





References in Audit Trail

- Overview

- Users can now see changes to related Objects, including *Link Targets* and *Match Text Variations*, in the Claim record's audit trail, providing comprehensive visibility to important changes to a Claim, including when:
 - References are added or removed
 - Match Text Variations are added, edited, or removed

Claims > Claim: CL-000011 ★ APPROVED

Details

- References (3)
- Match Text Variations (4)
- Workflow Timeline
- Where Used
- Link Targets (4)

Audit trail for Claim : Claim: CL-000011

Include related objects Link Target Match Text Variations

Timestamp: all

Event Description	Record
"Match Text" changed from "may be the best in the world." to "May be the best in the world"	Claim > Match Text Variation : CL-000011 > MTV-000035
Claim > Match Text Variation : CL-000011 > MTV-000040 created	Claim > Match Text Variation : CL-000011 > MTV-000040
"Lifecycle State" with value "In Review" has been deleted	Match Text Variation : MTV-000039
"Status" with value "Active" has been deleted	Match Text Variation : MTV-000039
"Match Text" with value "this is another claim" has been deleted	Match Text Variation : MTV-000039
Object reference "Claim" to "CL-000011" has been deleted	Match Text Variation : MTV-000039
"Name" with value "MTV-000039" has	Match Text Variation :

MANAGE

- Change State to Draft
- Change State to Withdraw

EDIT

- Copy Record
- Configure Page Layout
- Delete

VIEW

- Audit Trail**

1 of 34 records in this list

Edit

Maria Ruoto

10/10/2019 1:31 AM EDT

Maria Ruoto

6/25/2020 10:17 AM EDT

Link Targets and Match Text Variations will auto-populate in the 'Include related Objects field'

Changes to related Objects are now visible in the Claim record's audit trail



Excluded Characters

- Overview

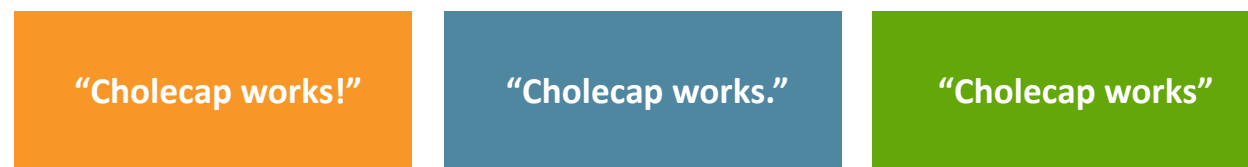
- Vault now has a defined set of special characters which are ignored when comparing Match Text and Match Text Variation values to document content, allowing a string of text to match regardless of the presence or absence of those characters in either location
 - E.g., Trust Cholecap and Trust Cholecap© would match

- Considerations

- The default set of Excluded Characters is:



- This feature is auto-on, but Admins can edit the default set of Excluded Characters
- Vault limits the Excluded Characters field to 20 characters, including spaces
- Vault treats each character independently – entering ‘always’ will read each letter (‘a’, ‘l’, ‘w’, etc.) as a separate excluded character
- Exclamation marks and trailing periods in Match Text will also be ignored





Excluded Characters

- Configuration (to edit or disable Excluded Characters)
 - Admin > Settings > General Settings > Edit > Documents section > Excluded Characters

Documents

- Enable Duplicate Content Detection
- Create new documents as Planned
- Enable checkout to Office Online
- Enable Original Source Tracking
- Enable Legal Hold
- Provision File Manager from Vault
- Enable check out to File Manager
- Allow Export All Files
- Enable Copy Link and unlock Permalink Object Type
- Enable Suggested Links
 - For Suggested Links, bypass Approve step on exact matches
 - Allow linking via selection of approved Annotation Keywords records
 - Exclude specific characters when matching Annotation Keywords to content

Exclude specific characters when matching Annotation Keywords to content

Excluded Characters

Exclude specific characters when matching Annotation Keywords to content

Admins can uncheck the 'Exclude specific characters when matching Annotation Keywords to content' to disable this feature

Edit Excluded text by adding or removing characters to the list



Add Annotation (Approved Links) Field

- Overview

- The new *Annotation (Approved Links)* field has been created so that Approved Suggested Link annotations and manually created Annotation Links can be differentiated

The image contains three screenshots illustrating the new 'Annotation (Approved Links)' field:

- Table Screenshot:** A table with columns: Name, Document Number, Suggested Links, Annotations (Links), and Annotations (Approved Links). The row for 'CholeCap Patient Information Leaflet (v2.1)' shows 3 Suggested Links, 3 Annotations (Links), and 1 Annotation (Approved Link). Callouts indicate that manually created links are in the 'Suggested Links' column and approved links are in the 'Annotations (Approved Links)' column.
- Acceptance Dialog Screenshot:** A dialog box with 'Accept' and 'Reject' buttons. A callout states: 'Accepting a Suggested Link creates an Annotation (Approved Link)'. The background shows a document snippet with a suggested link.
- Configuration Screenshot:** A 'Draft' configuration page for 'User Actions' showing 'Rule 1' with a condition 'If Annotations (Approved Links)'. A callout states: 'The Annotation (Approved Links) field is visible in Tabular view, Reporting, and Lifecycle configuration'. Below, the 'Allow the following actions' section shows 'Submit for QC' with an 'Action Label' of 'Submit for QC'.

- Considerations

- The Annotation (Approved Links) field is visible in Tabular view, Reporting, and Lifecycle configuration

Create Claims from Link Annotations



Streamline your Claim creation and approval process

- Overview

- Claim records can now be created in bulk from existing document references (link annotations) using the new *'Get Link Annotation Data'* action in conjunction with Vault Loader

- Considerations

- The resulting Claims can adopt:

The selected text	References to both documents and anchors	Metadata attributes such as <i>Country</i> and <i>Product</i>	Lifecycle State
-------------------	--	---	-----------------

- To use this action, Annotations must be:

Manually created Document Links	Applied to a text selection	Direct links to documents or anchors
---------------------------------	-----------------------------	--------------------------------------

- This action is only available when performing a Bulk Action from the Library's Tabular view
 - The visible columns in the Tabular view determine the data set retrieved by the bulk action

- Vault does not export data from:

Manual links with image selection	Suggested, Approved, Auto or Claim Links
-----------------------------------	--

Create Claims from Link Annotations



- Additional Considerations

- The user performing the Loader action becomes the Claim creator
- Vault does not currently prevent duplicate Claims
- The *Bulk Update* document permission is required to perform the 'Get Link Annotation Data' action

Permission Sets >
Copy of PromoMats User Actions

Details Admin **Application** Objects Tabs

Vault Actions

	All Vault Actions
Vault Actions	<input type="checkbox"/>

Dashboards and Reports

	All	Read Dashboards and Reports	Create Dashboards	Delete Dashboards	Share Dashboards	Schedule Reports	Administer Dashboards	Display Public Key Dashboards	Read Group Membership
Dashboards and Reports	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Workflow

	All Workflow	Start	Participate	Read and Understand	eSignature
Workflow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Workflow Administration

	All Workflow Admin	Cancel	View Active	Reassign	Update Participants	Email Participants	Update Workflow Dates
Workflow Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

API

	All API	Access API	Events API	Metadata API
API	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CrossLink

	Create CrossLink
CrossLink	<input type="checkbox"/>

Viewer Administration

	Manage Tags	Merge Anchors	Remove Annotations	Manage Anchors
Viewer Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Document

	Cancel Checkout	Download Document	Download Rendition	Bulk Delete	Bulk Update	Always Allow Unclassified	Check Out to File Manager	Portal Sync
Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Create Claims from Link Annotations

- Before you begin, you may wish to edit 1_annotation_keywords__sys.csv in one or more of the following ways:
 - If you have added required fields to the Claim Object: Add columns and values for any required Claim fields not already present in the CSV
 - Edit other specific values – for example, you may wish to revise values in the match_text__sys column for brevity, or to replace superscript numbers with [wildcards](#)
 - If you do not wish to create Claims in the Approved state from approved documents, you must edit the corresponding state__v column value before uploading
 - Check the file for potential duplicate records

create_from_annotation_id__sys	match_text__sys	product__v	state__v	create_from_annotation_source__sys	Reference: Source Document State
63946_386	CholeCap may be effective in controlling your cholesterol ¹	00P000000000501	approved_state__sys	1520_0_1	Approved

create_from_annotation_id__sys	match_text__sys	product__v	state__v	create_from_annotation_source__sys	Reference: Source Document State	notes__c
63946_386	CholeCap may be effective in controlling your cholesterol{*}	00P000000000501	draft_state__sys	1520_0_1	Approved	Efficacy study



Create Claims from Link Annotations

- Extracting link annotation data
 1. Select Documents and Refine selection as needed

All Library Save View As

▼ Filters (1) [Clear All Filters](#)

» Document Number: **Mat-LB-10014, US-CH-1900002** ✕

1-2 of 2 ⚙️

Name	Document Number	Suggested Links	Annotations (Links)	Last Modified Date	Status	
Patient Leave Behind (v1.0) ★	Mat-LB-10014	0	2	7/24/2020 10:55 AM EDT	In Reapproval	<div style="border: 1px solid orange; padding: 2px;">PERFORM BULK ACTION</div> <div style="border: 1px solid gray; padding: 2px;">All 2 Documents</div> <div style="border: 1px solid gray; padding: 2px;">MANAGE</div> <div style="border: 1px solid gray; padding: 2px;">Start Multi-document Workflow</div> <div style="border: 1px solid gray; padding: 2px;">EXPORT</div> <div style="border: 1px solid gray; padding: 2px;">Text</div> <div style="border: 1px solid gray; padding: 2px;">Excel</div> <div style="border: 1px solid gray; padding: 2px;">VIEW</div> <div style="border: 1px solid gray; padding: 2px;">Edit Columns</div> <div style="border: 1px solid gray; padding: 2px;">Truncate Cell Text</div>
(PDF_Multi) CholeCap May Help You Manage Your Cholesterol_Patient (v2.0) ★	US-CH-1900002	0	1	4/24/2020 6:10 PM EDT	Approved for Distribution	

Refine Selection (Step 1)

2 of 20 documents selected

	Name	Document Number	Suggested Links	Annotations (Links)
<input checked="" type="checkbox"/>	(PDF_Multi) CholeCap ...	US-CH-1900002	0	1
<input checked="" type="checkbox"/>	Patient Leave Behind	Mat-LB-10014	0	2



Create Claims from Link Annotations

- From the Choose Action page, select Get Link Annotation Data
- Click Next to open the Confirmation page and review the summary of selected documents
- Click Finish
- You will receive a Notification and an email with a link to download a ZIP file when the export is complete

veeva Vault

Link annotation data is ready for download. Click on the link below to download the file.

[2020-10-09T2200 - CC CSM DAM Demo Vault - link annotation data.zip](#)

This link will expire on 10/25/2020 10:00 PM EDT.

Notifications

10/9/2020

Link annotation data is ready for download. Click on the link below to download the file.

[2020-10-09T2200 - CC CSM DAM Demo Vault - link annotation data.zip](#)

This link will expire on 10/25/2020 10:00 PM EDT.

seconds ago

Choose Action (Step 2)
This change affects up to 2 documents.

Edit Document Fields

- Edit Fields [\[Calculate Permissions\]](#)

Edit Sharing Settings

- Add Users to Role [\[Calculate Permissions\]](#)
- Remove User from Role [\[Calculate Permissions\]](#)
- Change Owner [\[Calculate Permissions\]](#)
- Change Coordinator [\[Calculate Permissions\]](#)

Manage Documents




- Start Workflow
- Change State
- [\[Calculate Permissions\]](#)
- [\[Calculate Permissions\]](#)
- [\[Calculate Permissions\]](#)
- Create Document Relationships [\[Calculate Permissions\]](#)
- Archive Documents [\[Calculate Permissions\]](#)
- Get Link Annotation Data [\[Calculate Permissions\]](#)**
- Apply Legal Hold
- Remove Legal Hold
- Create Batch [\[Calculate Permissions\]](#)

Only available when performing a Bulk Action from the Library's Tabular view



Create Claims from Link Annotations

- The downloaded package will contain three files, which must be loaded in numerical order, using [Vault Loader](#):
 - **1_annotation_keywords__sys.csv**: Used to create new Claim Object records
 - **2_link_target__sys.csv**: Used to create new Link Target Bbject records
 - **3_annotation_keyword_targets__sys.csv**: Used to create new Claim Targets Object records

Name	
 1_annotation_keywords__sys.csv	
 2_link_target__sys.csv	
 3_annotation_keyword_targets__sys.csv	



Create Claims from Link Annotations

- Creating new *Claim Records* using Vault Loader

1. Click the Choose button in the CSV File fields and select 1_annotation_keywords__sys.csv

- When creating Claim records in the Approved state:

- The Approved state must be defined in the CSV
- The Claim must pass validation for Approved state
- Loading the 1_annotation_keywords__sys.csv without loading one or both of the additional files results in Approved Claims without References



If these conditions are not met, Vault creates the records in Draft state



Vault will ignore these records when performing the Suggest Links action

2. From the Object Type dropdown, select Claims (annotation_keywords__sys)

3. From the Action Type dropdown, select Create

- Important: Select the Record Migration Mode checkbox

4. Click the Start Load button

Vault Loader: Load ?

CSV File* Choose 1_annotation_keywords__sys.csv

Object Type* Claims (annotation_keywords__sys)

Action Type* Create

Key Field

Record Migration Mode

Document Migration Mode

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

Map Fields ?

Select Record Migration Mode

create_from_annotation_id__sys	match_text__sys	product__v	state__v	create_from_annotation_source__sys	Reference: Source Document State
63946_386	Prescribing Information	00P000000000501	approved_state__sys	1520_0_1	Approved

The Approved state must be defined in the CSV



Create Claims from Link Annotations

- Creating *Link Target Records* using [Vault Loader](#)
 1. Click the Choose button in the CSV File fields and select 2_link_target__sys.csv
 2. From the Object Type dropdown, select Link Targets (link_target__sys)
 3. From the Action Type dropdown, select Create
 4. Click the Start Load button

Vault Loader: Load ?

CSV File* 2_link_target__sys.csv

Object Type*

Action Type*

Key Field

Record Migration Mode

Document Migration Mode

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

?

Link Target Records establish the relationships to documents and anchors.



Create Claims from Link Annotations

- Creating *Claims Target Records* using Vault Loader
 1. Click the Choose button in the CSV File fields and select 3_annotation_keyword_targets__sys.csv
 2. From the Object Type dropdown, select Claims Targets (annotation_keyword_targets__sys)
 3. From the Action Type dropdown, select Create
 4. Click the Start Load button

Vault Loader: Load ?

CSV File* 3_annotation_keyword_targets__sys.csv

Object Type*

Action Type*

Key Field

Record Migration Mode

Document Migration Mode

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

?

Claim Target records join Claim records to Link Target records.



Auto-On: Working with Documents



Configurable Standard Metrics

- Overview

- The three user input fields for Standard Metrics will no longer be required by default

- Global Content Type
- Content Creation Currency
- Content Creation Cost

Standard Metrics

Global Content Type	
Content Creation Currency	Decline to Provide
Content Creation Cost	Decline to Provide > Decline to Provide
Initial In Review Date	
Days to Enter Review	
Days in Review	
Number of Review Cycles	
Initial Steady State Date	
Days to Approval	

Admin can make Standard Metrics fields required using field dependencies

- All configuration options available to other standard fields are now available to Standard Metrics fields

- Considerations

- Admins can now use:

- Field Dependencies to make Standard Metrics fields Required
- Field Level Security to hide Standard Metrics fields from all or select users and roles

- For more information please visit [Vault PromoMats Standard Metrics](#)

Standard Metrics Job to Update Global Content Type to Mapped Value



- Overview

- When 20R3 releases, an asynchronous job called Standard Metrics GCT Mapping Document Update will run *automatically* and will update any documents whose Global Content Type is *Not Specified* to a mapped GCT value

The screenshot displays the Veeva Vault interface for configuring document types. On the left, a tree view under 'Document Types' shows a hierarchy: Base Document (base_document__v) > Event Material (event_material__v) > InDesign Component (indesign_component__v) > Material (jobs__c) > Promotional Piece (promotional_piece__c) > Advertisement (advertisement__c). A callout box points to 'Standard Metrics' and 'Global Content Type Not Specified'. The main window, 'Edit Details: Advertisement (Classification)', shows 'relationship types' (Related Pieces, Auto-Linked, eCTD Source, Original Source, Related Claims, Component Assets, Supporting Documents, Suggested Links, Linked Documents), 'Document Type Groups (Inherited from Material)' (All Documents, All Materials), and 'Global Content Type (Not inherited from parent. Remove override)' set to 'Print / Physical Resource'.

- Considerations

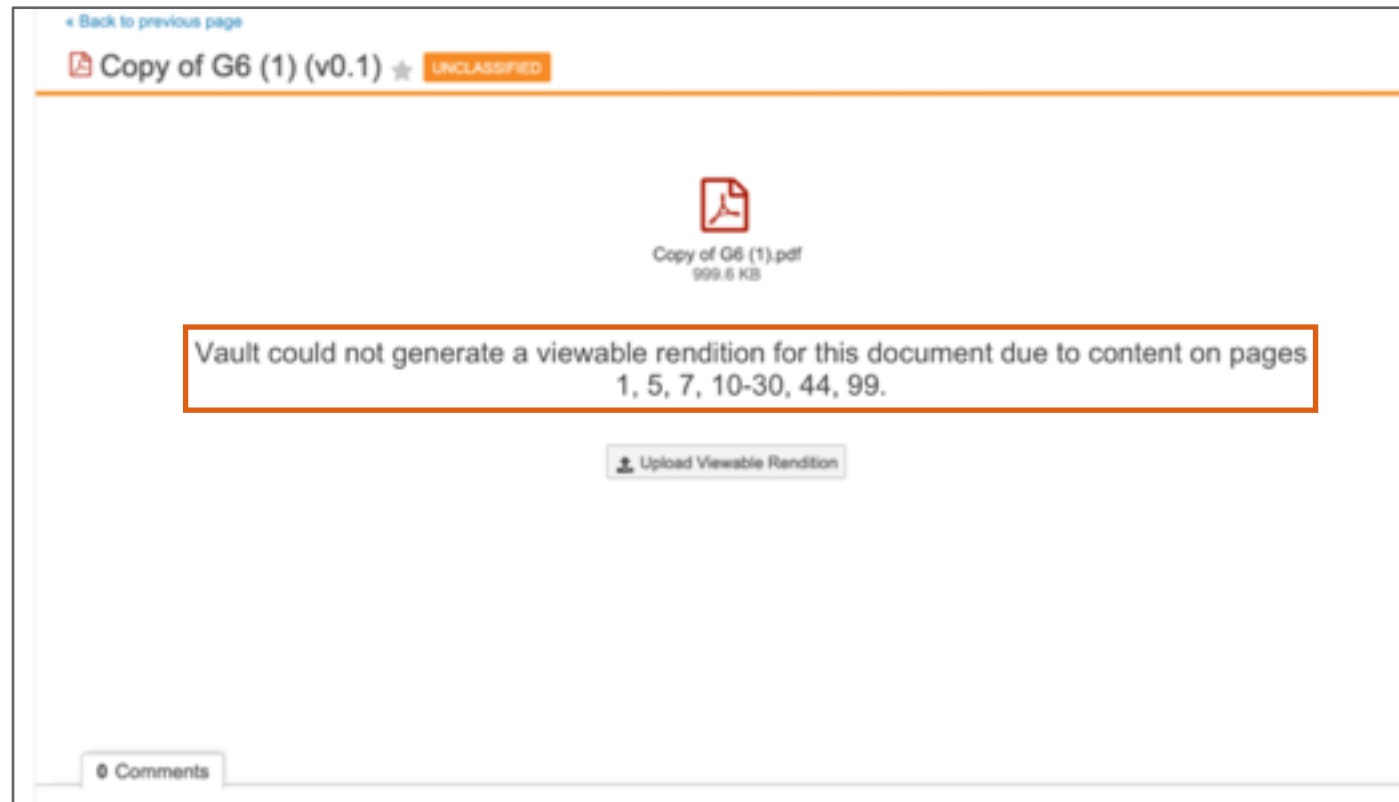
- If no mapped Global Content Type value is configured or inherited from the parent document type, Vault will not update the document
- This job will not update archived documents
- Vault Owners can run and re-run this job using Vault REST API version 20.1 or higher
 - Learn more in the [Vault Developer Portal release notes](#)



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



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 always 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 or hidden 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

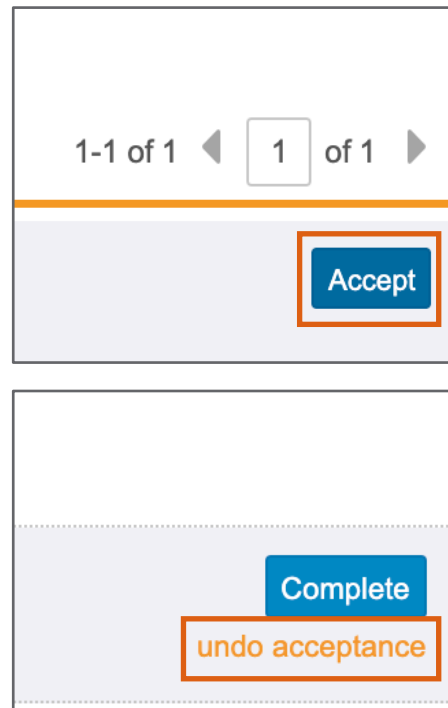
- The label that is displayed is based on whether tasks in the workflow use the Assign to all users in a participant group or Make available to users in the participant group options

The image shows two side-by-side screenshots of a 'Start' dialog box for a workflow task. Both dialog boxes have a 'Reviewers*' field containing 'Jake Roberts', 'Maria Ruoto', and 'Tony Tiger'. The left dialog box has a label 'Assigned to every user' in an orange box, and the right dialog box has a label 'Available to any user' in an orange box. Below these is a 'Workflow Task Options' dialog box with 'General Settings' showing 'Task Label' as 'Review' and 'Assign Task To' as 'Reviewers'. Under 'Assign Task To', there are two radio button options: 'Assign to all users in participant group' (which is selected and highlighted with an orange box) and 'Make available to users in participant group'. An orange callout bubble points to these options with the text 'Label is dependent on how the workflow tasks are assigned'. The 'Start' dialog boxes also have a 'Please add your instructions for Reviewers...' text area and a 'SME' checkbox.



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



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

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

MANAGE
Send as Link
Copy Link
Export All Files
Download Notes
Sharing Settings

EDIT
Archive Document
Check In from Vault File Manager
Undo Checkout
Apply Legal Hold
Export Annotations

Checking in from Vault File Manager

Use the Vault File Manager desktop application to finish checking in.

The page will refresh when check in is complete, or click the close button to continue using Vault.

[Learn more](#)

CholeCap Signature Graphic Adobe Illustrator Automated Image Rendition - 19R3 Demo (v0.2) DRAFT

In Approval with Librarian Approved for Use Expired Renegotiating Usage Rights

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

Scenario #1

Therapeutic Area and Product by Country

Cancel Run Save

PROPERTIES
Report Type Therapeutic Area with Country and Product

CONDITIONAL FIELDS

FILTERS

Therapeutic Area > Country in

Product > Country in

Both Filters reference the Country Object

Both Filters use the same Operator

Scenario #2

Claims by Country

Cancel Run Save

PROPERTIES
Report Type Document

CONDITIONAL FIELDS

FILTERS

Country in

Claim > Country in

Both Filters reference the Country Object

Both Filters use the same Operator

Reporting: Combine Dashboards Prompts



Document and Claims Dashboards

Filters (1): Claim > Country in United States

Prompt selection will apply to both Dashboard components

Document Name	Record Count
AdobeStock_93001580	1
Brand Portal_updated deck April 3	1
EventSearch_02_05_2020_123923	1
Screen Shot 2020-03-27 at 12.37.40	1
VeevaProm HCP Presentation Rise Ab	1
Voderal & Cholecap Combination Pill	1

Name	Record Count (Claim)
CL-000044	1
The first and only statin approved	1

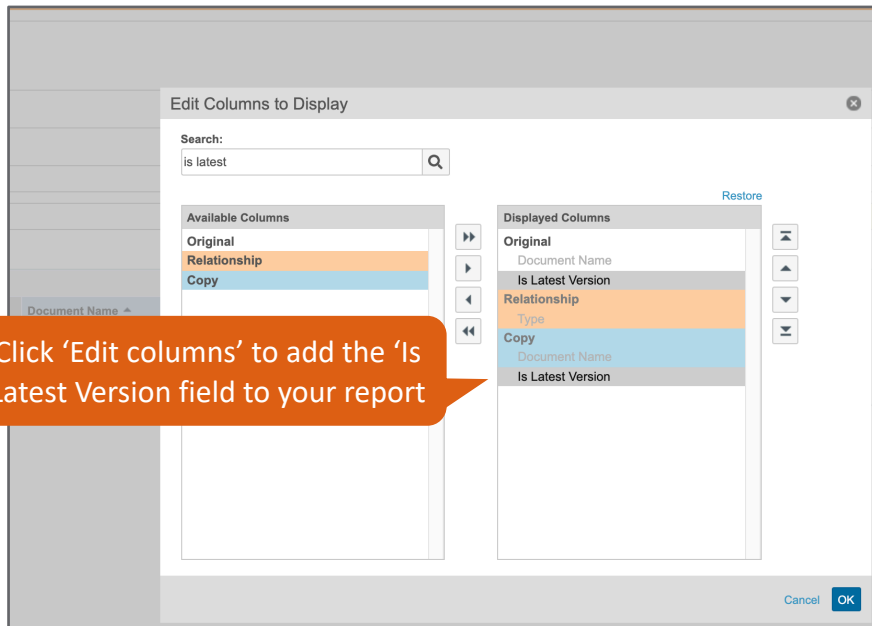
- Considerations

- If filter prompts are within the same report, they will still need to be selected individually when running the Report outside of the Dashboard



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

- Overview
 - Matched Document and Document Relationship Reports now support the 'Is Latest Version' field
- Where to Find
 - Reports > [Create or Edit Matched Document or Document Relationship Report] > Edit Columns



Click 'Edit columns' to add the 'Is Latest Version' field to your report

Document and References - Latest Version ★

PROPERTIES
Report Type Source Document with Target Document

FILTERS (2)

Source Document (50)		Relationship (218)	Target Document (218)	
Document Name	Is Latest Version	Type	Document Name	Is Latest Version
CholeCap Indicationa and Usage (v0.1)	Yes	Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
CholeCap Patient Information Leaflet (v2.1)	Yes	Linked Documents	Cholecap Patient Leaflet (v2.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	CholeCap New Efficacy Study (Invite) (v1.0)	Yes
Cholecap AE (v3.2)	Yes	Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap ISI (v1.0)	No
Cholecap Follow-up (unsub) (v1.0)	Yes	Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Patient Leaflet (v1.0)	No

Reference is not the latest version



Reporting: Object Formula Fields in Reports

- Overview

- Users who have the ability to create and edit reports will now be able to define formula fields directly in Object reports

The screenshot illustrates the process of creating and displaying a formula field in a report. On the left, a sidebar shows the configuration options for a report, with the 'FORMULA FIELDS' section highlighted. The main area shows the configuration for a formula field named 'Number of days to Approve' for the 'Asset Request' object. The return type is set to 'Number' and the decimal places are set to '1'. The formula expression is `asset_request__c.request_approval_date__c - asset_request__c.created_date__v`.

Below the configuration, a report titled '20R3 Object Formula Fields in Reports - Demo' is shown. The report table includes a column for the formula field, 'Number of days to Approve', which is highlighted with an orange callout: 'Add formula field as a column'. The table also includes columns for 'Request Number', 'Asset Request Type', 'Created Date', 'Request Approval Date', and 'Document Name'. An orange callout points to the formula field configuration in the report: 'Formula fields will display the Object, return type, and formula expression'.

Request Number	Asset Request Type	Created Date	Request Approval Date	Number of days to Approve	Document Name

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")`

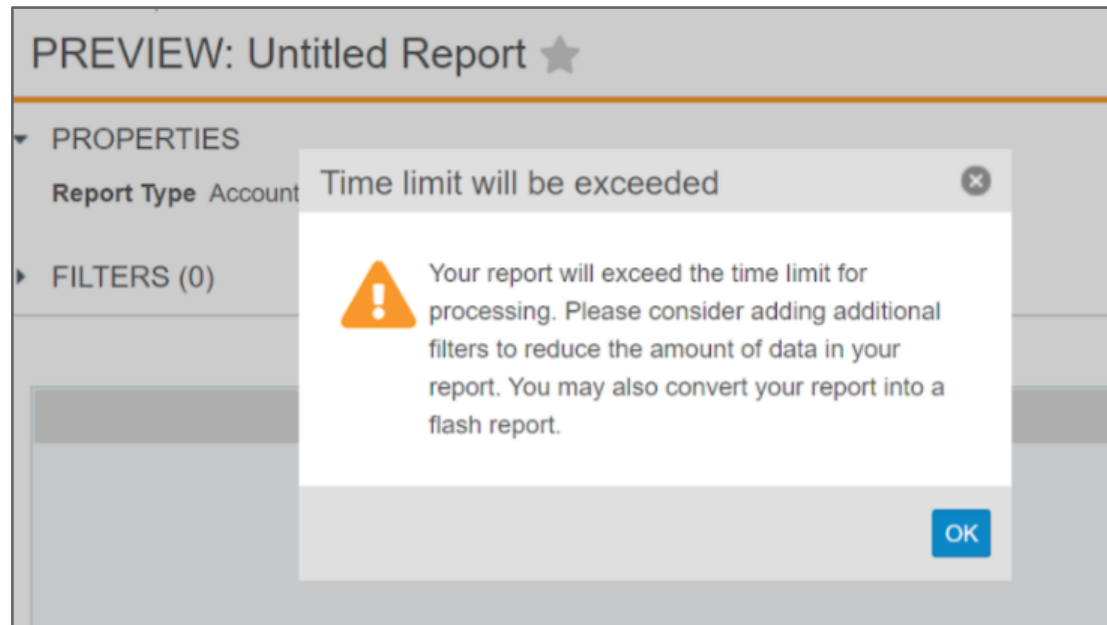
- Considerations

- Multi-pass report types, matrix reports, and EDL Item reports 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	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



Configuration: Portals



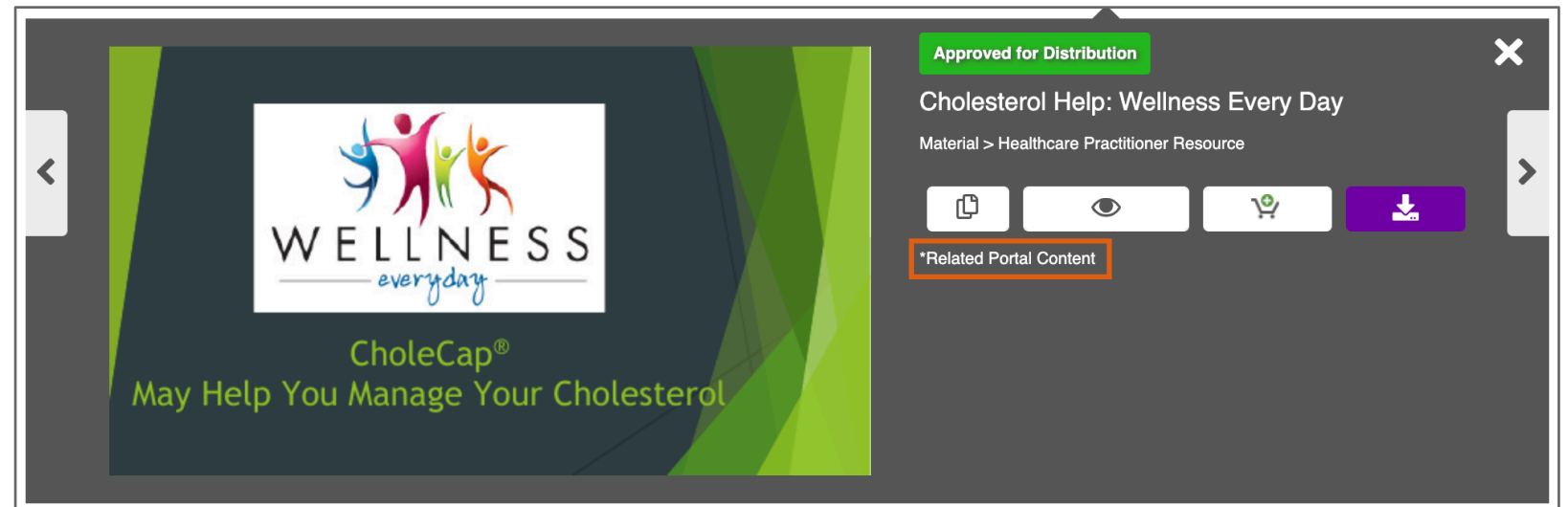
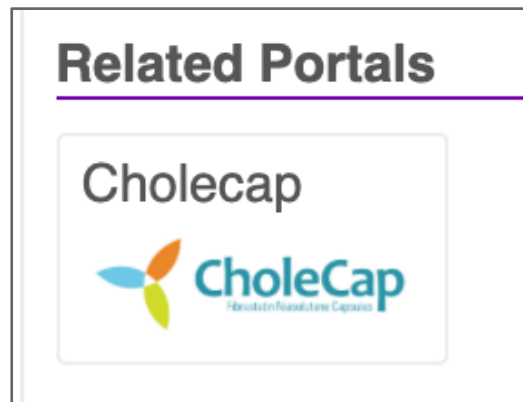
Portals: Related Portals

- 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

Active

Related Portals

Animal Health





Configuration: Object & Multi-Document Workflows

Multi-document workflows (MDW) allow you to send one or more documents out for review and approval on a single workflow instance.



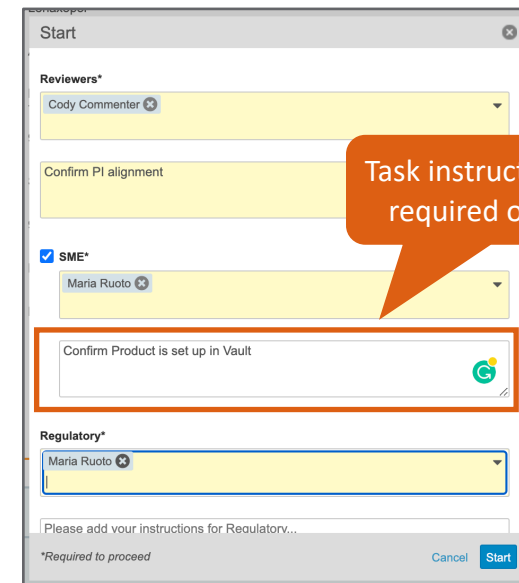
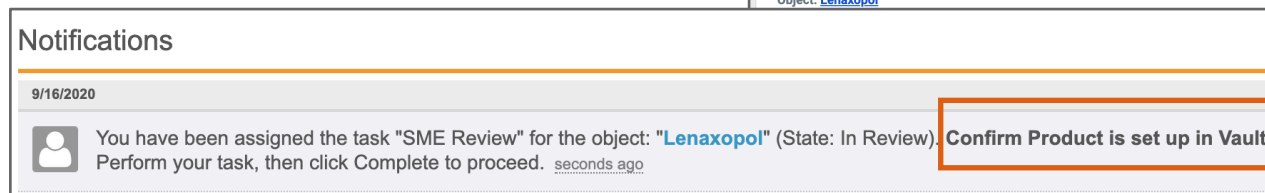
Ad Hoc Task Instructions

- 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

Use roles as participants

Use custom action to define participants

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}). Special Instructions: \${taskInstructionsByInitiator}
 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}).
 Perform your task, then click Complete to proceed.</p> <p>Special Instructions: \${taskInstructionsByInitiator}</p> <p>Vault: \${vaultName}
 Object: \${Object.name__v}
 State: \${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: \${vaultName}</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*

Add Participants* Allow workflow initiator to select participants

Roles allowed to participate

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*

Roles allowed to participate

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 rules 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

Before Task Assignment

Name	Role	Sharing Rules	Access
Maria Ruoto	Owner		Manual Assignment

Workflow initiator selects Reviewers

After Task Assignment

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

Selected users have been added to the Reviewer Role



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

+ Add rule

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

The image displays two screenshots of the 'Workflow Timeline' interface. The top screenshot shows a 'Vendor Approval' task initiated by Maria Ruoto on 9/10/2020 at 9:46 AM PDT. The 'DETAILS' panel for this task shows the 'Commercial Ops Approval' role and a 'Reassign' button. An orange callout bubble points to this panel with the text 'Example: Approver role actions while 'In Approval''. The bottom screenshot shows the same 'Vendor Approval' task initiated by Maria Ruoto on 9/10/2020 at 12:46 PM EDT. The 'DETAILS' panel for this task shows the 'Commercial Ops Approval' role and a menu with options: 'Reassign', 'Update Task Due Date', and 'Cancel Task'. An orange callout bubble points to this panel with the text '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*

Veeva Vault

Maria Ruoto,

You have been assigned the task "" for the object: "**Abetol**" (State: **Approved**). 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 Compton
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

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]

Object Workflows > New Product > Notification

Notification Step

Details

Label* Notification

Name* notification

Type* Notification

Description

Next Steps End

Notification Options

Message Template* Task Assigned

Recipient* Reviewers

Include verdicts from previous tasks

Select Tasks* Ad Hoc Review (if needed) Review

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>
<b>${taskVerdicts}</b>
<p>Access your Vault here: <a href="${uiBaseExtUrl}">${vaultName}</a></p>
<p>Workflow Owner Email Name:
${workflowInitiatorEmail}</p>

```

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

Task Step

Prompt for Verdicts

Verdicts

Verdict Label* Approved

Short-circuit tasks with the configured tags.

+ Add Comments

+ Add eSignature

+ Add Reasons

+ Add Field Prompts

Verdict Label* Rejected

Short-circuit tasks with the configured tags.

+ Add Comments

+ Add eSignature

+ Add Reasons

+ Add Field Prompts

+ Add Verdict

Notification

Email Template Task Assigned (Object)

Include verdicts and comments from previous tasks

Select Tasks* Ad Hoc Review (if needed) Review



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
- Considerations
 - This feature is available to Admins automatically when creating or updating Job Definitions
- Where to find
 - 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



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
- Limit: 4 level deep trees
- Can manage direct children only
- Temporary allowance management also available
- General Release: Sees direct children / Limited Release: Sees everything below
- Pre-Release allowances are not transferable
- The Sandbox – Edit permission must be granted to the relevant permission set
 - Admin > Users & Groups > Permission Sets > [Permission Set] > Admin > Sandbox – Edit

- Where to Find

- Admin > Deployment > Sandbox Vaults

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

Set Allowance

Set allowance for Sandbox: DemoCSMMR

Grant Revoke

Demo Max: 2

Cancel Confirm



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*

Object Type*

Action Type*

Key Field

Record Migration Mode

Document Migration Mode

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

?

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



- Overview

- Vault Loader now supports the extract of all document metadata and Object columns in a single call even when there are more than 10 Object references

- Considerations

- The enhancement has been made to Vault Loader UI, CLI, and REST API
- 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](#)

Vault Loader: 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

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' interface. 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 'Generate Outbound Packages' checkbox is checked and highlighted with a red box. A 'Finish' button is visible at the bottom right.



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

My Vaults

All My Vaults ▾ Vault Name ▾

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

Note: The middle card is highlighted with an orange box and a callout bubble.



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 from the Veeva CRM interface. The left screenshot shows the 'General Info' configuration page for the User Object. It features a grid of fields for user information, including Name, First Name, Last Name, User Name, Email, Alias, Company, Language, Locale, Timezone, Image, OrgWiki Profile Page, Location, Office Phone, Mobile, Fax, Portal Experience User, Preferred Currency, and Employee ID Number. A callout box with the text 'Add Landing Tab field' points to the 'Landing Tab' field at the bottom of the grid. The right screenshot shows the user profile page for 'User: CSM User'. It displays the user's details, including Name, First Name, Last Name, User Name, Email, Alias, Company, Language, Locale, Timezone, Image, OrgWiki Profile Page, Location, Office Phone, Mobile, Fax, Portal Experience User, Preferred Currency, and Employee ID Number. A callout box with the text 'Update default Landing Tab' points to the 'Landing Tab' dropdown menu at the bottom of the page, which is currently set to 'Library'.



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' interface. The 'Cholecap' product is selected, and the 'Audit Trail' option is highlighted in the context menu. The secondary window displays the audit trail for 'CholeCap' with the following details:

Audit trail for Product : CholeCap

Include related objects ?

Timestamp [all]

+ Add filter

Apply

Showing events for 1/9/2018 to 10/6/2020 (4 results)

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 ▼

Add new Section

Edit Detail Section

Section Label* Details
Section Name* details_c
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.
81/255

Edit Section

Enter Section Help content and click 'Save'



Audit Action Security for Objects

- Overview

- This feature allows admins to control access to the Object audit trail by Object, state, and role via the Object Lifecycle Atomic Security actions
 - 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

Object Lifecycles > Claims Lifecycle >
Draft ?

Status Edit

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



Resources

Resources

- Contact your Customer Success Manager 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>
- Vault Help: <http://vaulthelp2.vod309.com/wordpress/>





Appendix



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

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	<i>Not a member</i>		
MR_CSM_LR_Sandbox	<i>Not a member</i>		

After

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

USERS & GROUPS

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

Domain Users >

Domain User: Janice Ruiz

▼ Primary Information

Domain Status: Active Domain Admin

User Name: [janice.ruiz@csmdam.com](#) Last Domain Login: 10/23/2020 2:47 PM EDT

Email: [janice.ruiz@veeva.com](#)

▼ Vault Memberships ✎ Edit

Search Name 1-5 of 5

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

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 Active ▾

Source ← Custom

Data Store High Volume ▾ ?

Description

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

- Considerations

- Learn more about specific [components added to PromoMats Vaults](#)
 - Learn more about specific [components added to MedComms Vaults](#)

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

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 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 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)

Expand Sibling Record State Check Entry Action to All Applications

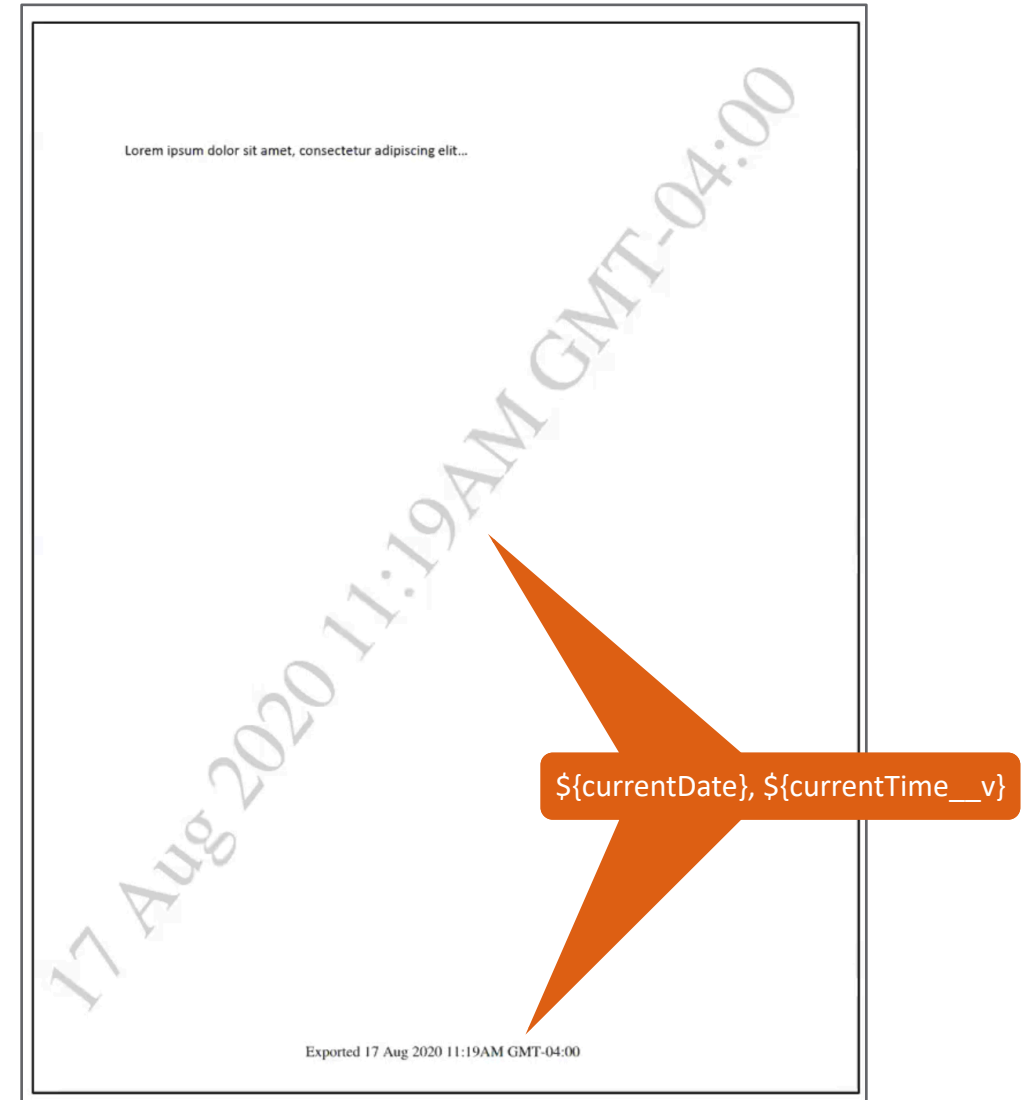


- Overview
 - The lifecycle entry action ‘Check Sibling Records’ before updating related record, which validates that all the siblings of a record are in the same state or group of states before changing the state of a related record, is now available in all Vaults
- Use Case
 - This configuration option 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 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](#)

Overlay Templates >
Current Status ?

Details

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





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 level

The screenshot shows the user detail page for Amy Duong. The 'Permission Sets' section is highlighted with an orange box. It includes an '+ Add' button and a search field. Below is a table of assigned permission sets:

Name	Level
QMS user base actions	Security Profile
Equipment Initiator	User
Audit Creator	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 ?



Thank you