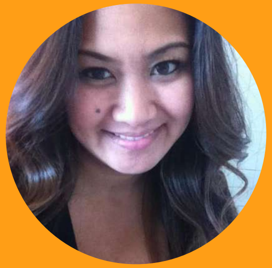
Veeva Commercial Vault PromoMats 20R3 Deep Dive

November 2020



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Veeva

Self Serve Recording Navigation

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

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

Get Best
Practices

Connect &
Collaborate

250+
life science
companies

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

Atomic Security for Documents:
Active Workflow Actions
Lifecycle User Actions

20R2 Aug 2020
Support Enabled

will change to

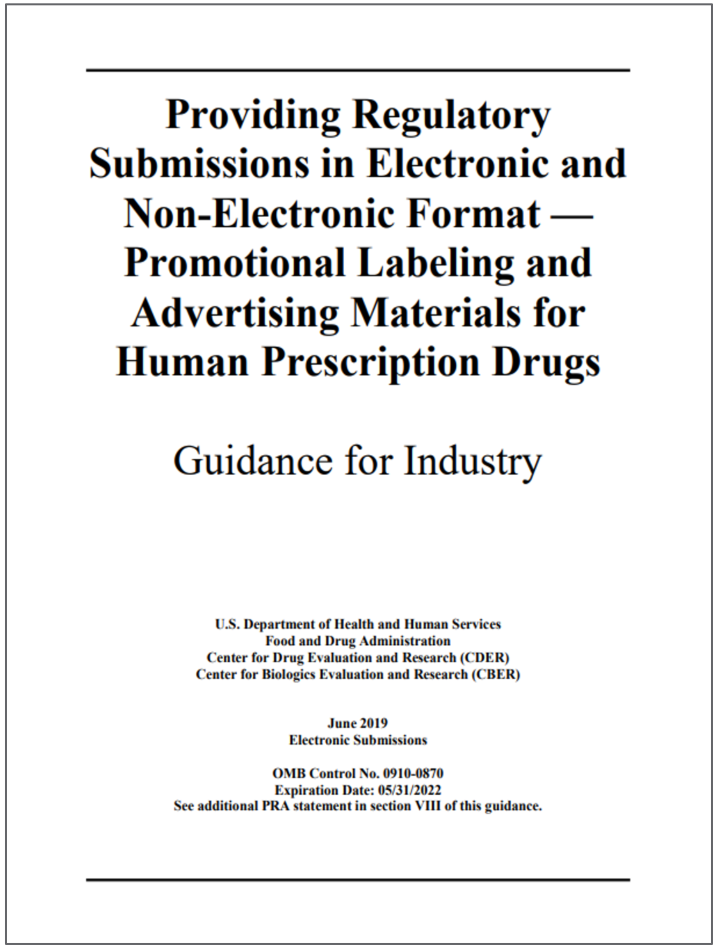
21R1 Apr 2021
Auto-On Enabled

- ***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

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.

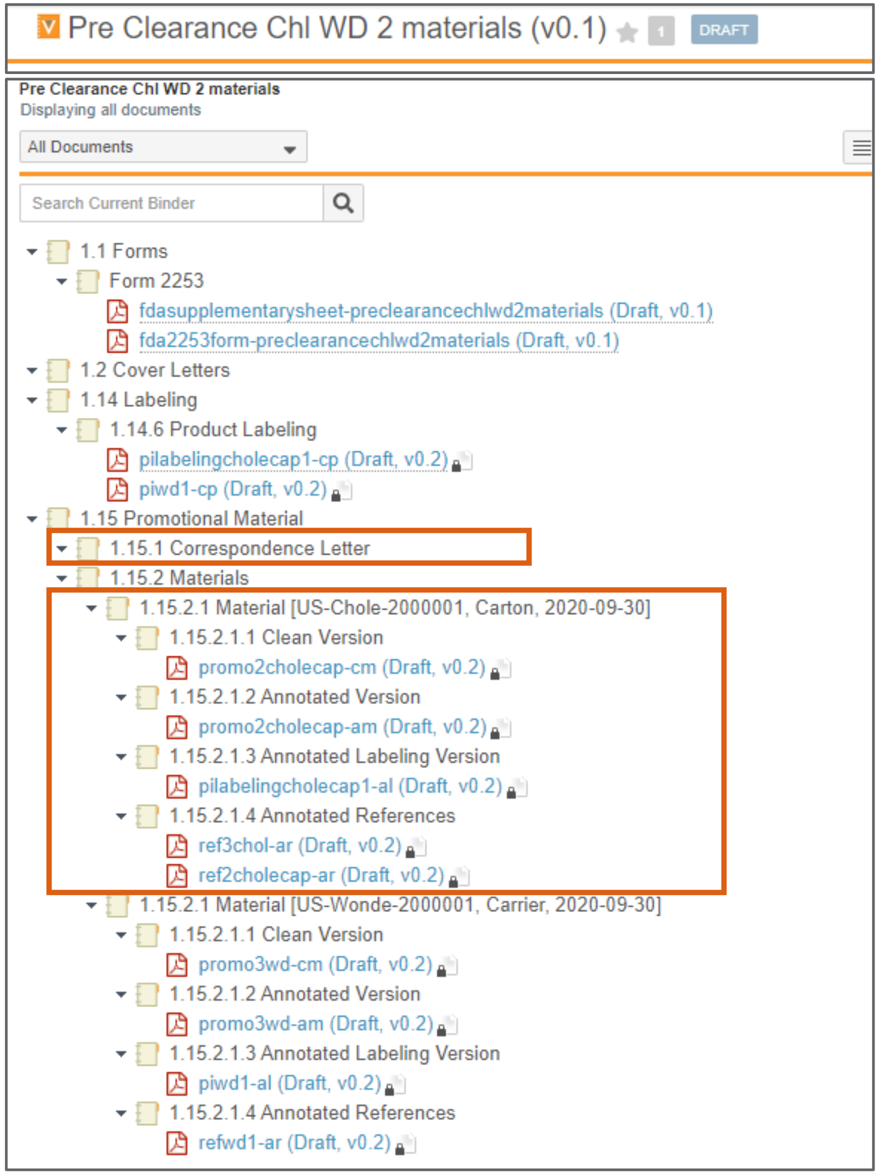
eCTD Compliance Package Generation

- 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

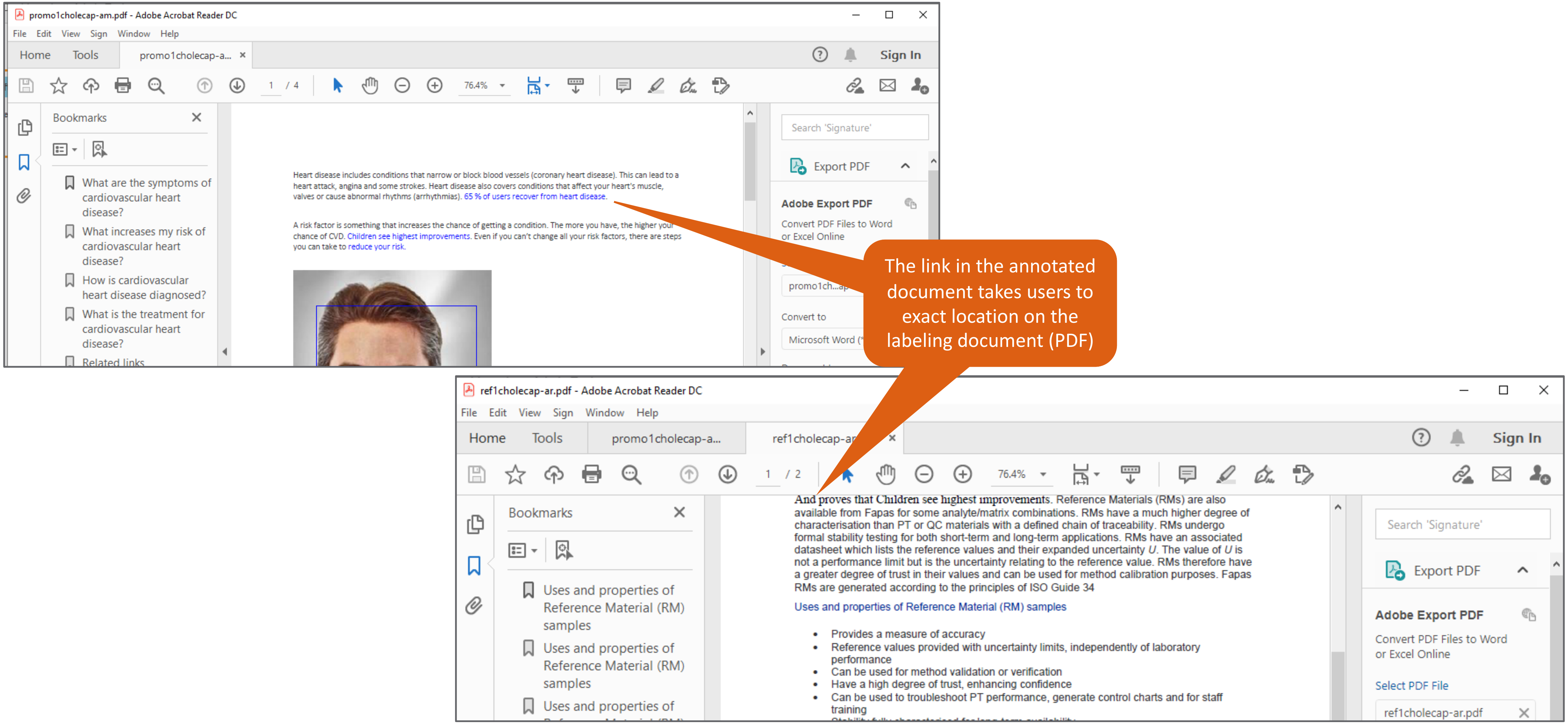
eCTD Compliance Package Generation

- 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

Quick access
- Desktop
- Downloads
- Documents
- Pictures
- 21R1
- eCTD Demo Materia
- EU Summit 2020
- Forms and letters Te

OneDrive

This PC

Network

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
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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

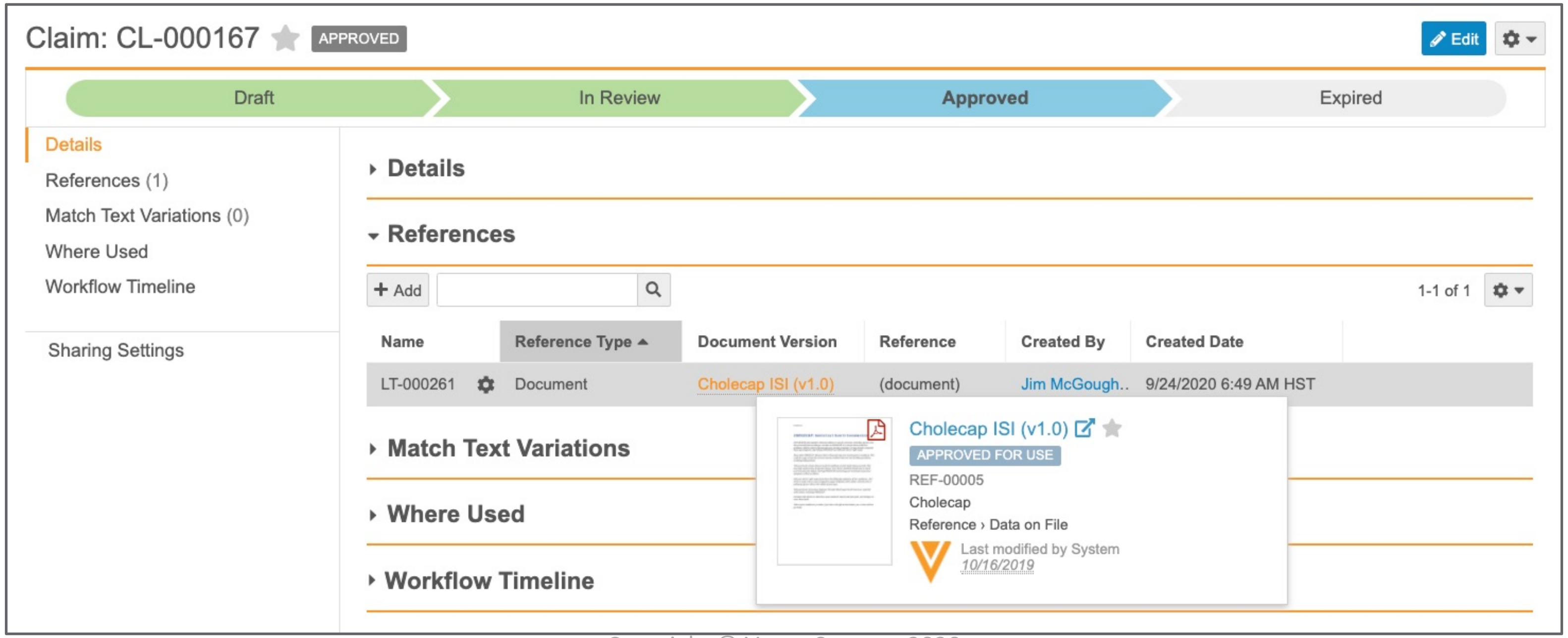
eCTD Compliance Package Generation

- 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

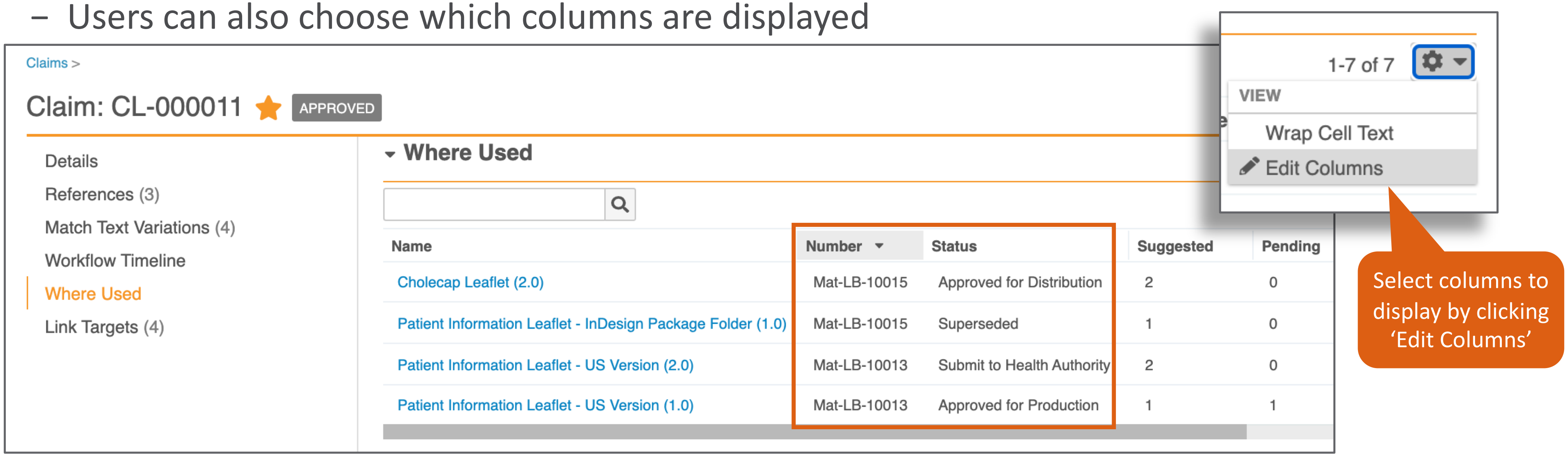
Simple Version Binding on References in Claims

- 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.



Where Used Enhancements

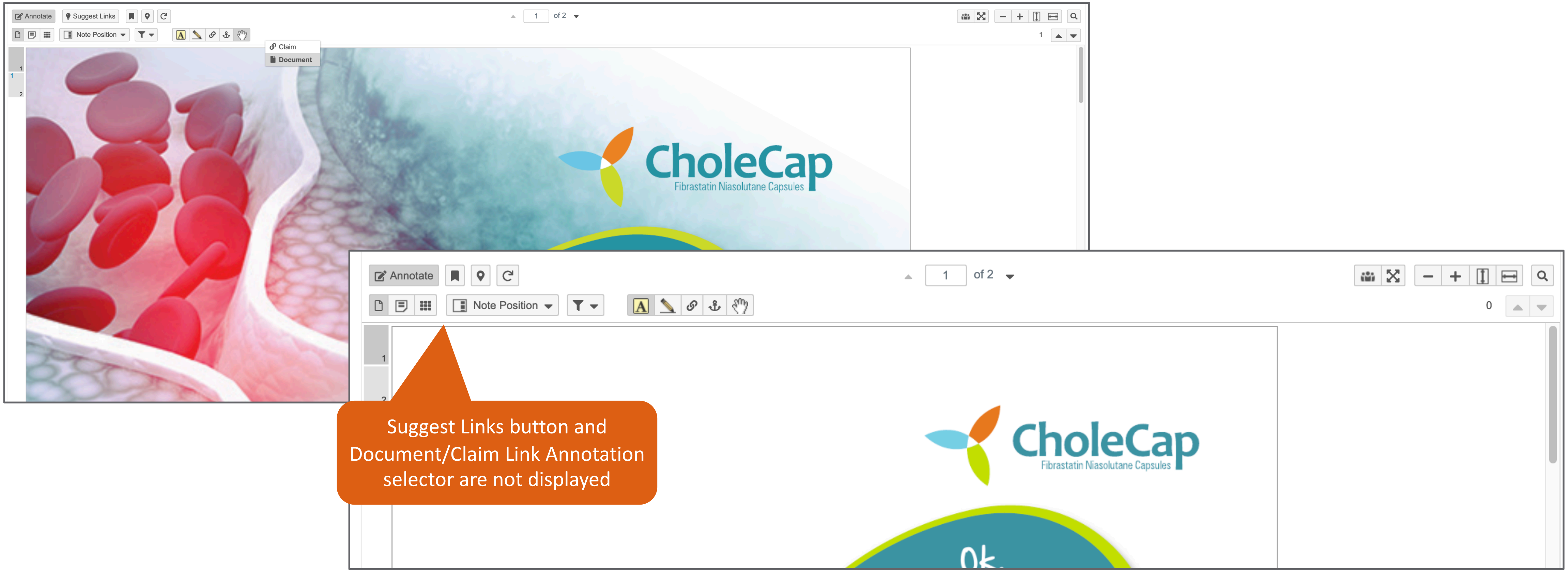
- Overview
  - This enhancement provides additional details to users when they are viewing the Where Used table on a Claim record by adding two columns to the Claim's Where Used component:
    - *Document Number*: Displays the document number of the document where the Claim is used
    - *Document Status*: Displays the lifecycle state of the document where the Claim is used
- Considerations
  - Users can also choose which columns are displayed



- Learn more about the [Where Used component]

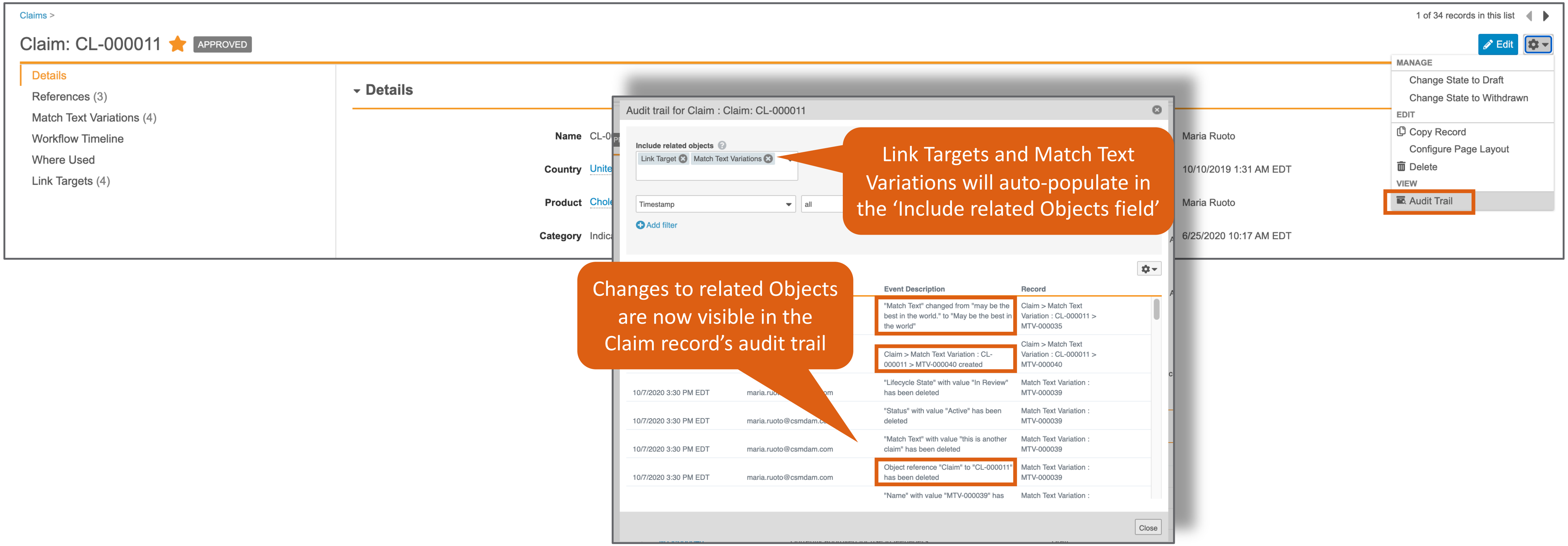
Hide Suggest Links Button When No Matching Claims Exist

- 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



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:

Copyright: ©	**Registered: ®**	**Trademark: ™**	**Servicemark: ℠**

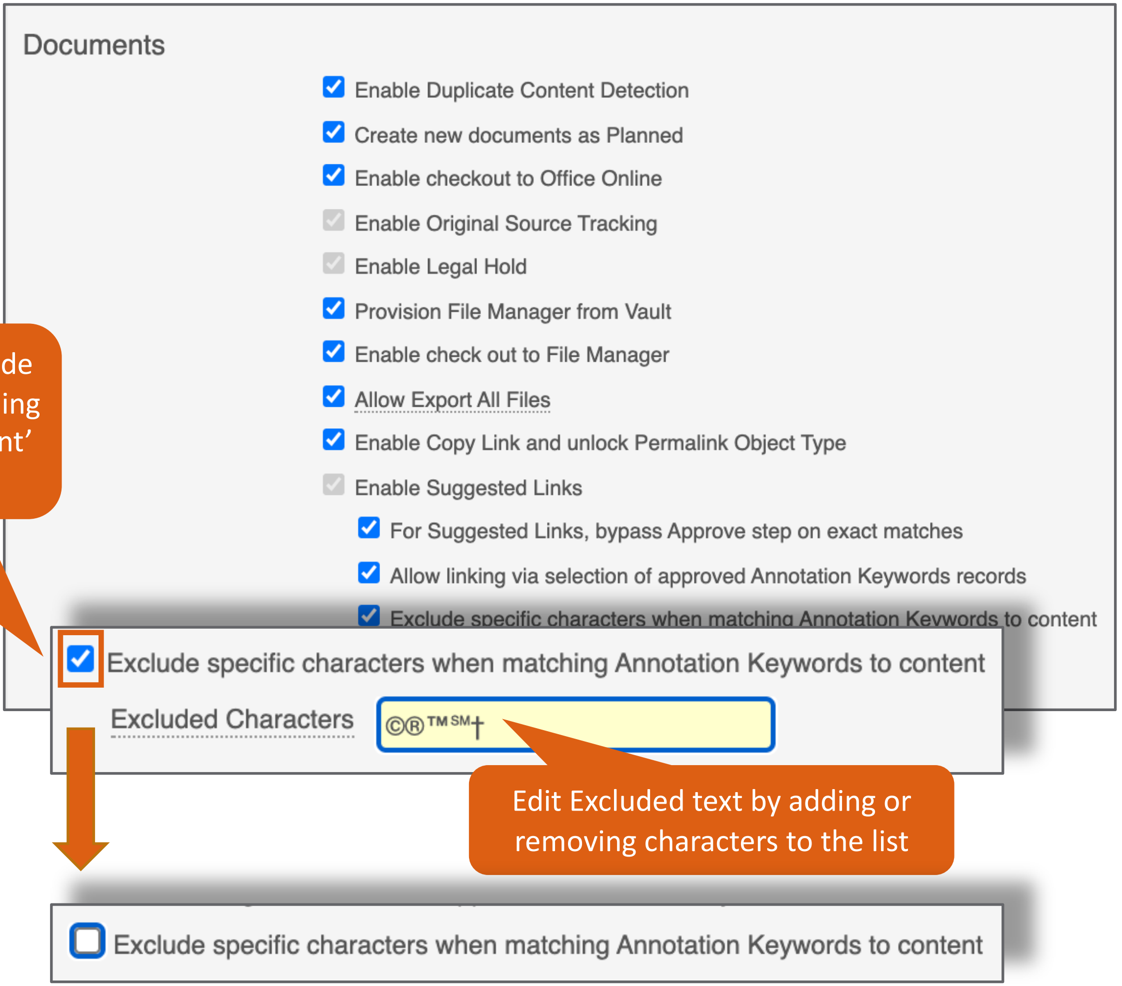
  - This feature is auto-on, but Admins can edit the default set of Excluded Characters
  - Vault limits the Excluded Characters field to 20 characters, including spaces
  - Vault treats each character independently – entering ‘always’ will read each letter (’a’, ‘l’, ‘w’, etc.) as a separate excluded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

“Cholecap works!”	**“Cholecap works.”**	**“Cholecap works”**

Excluded Characters

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

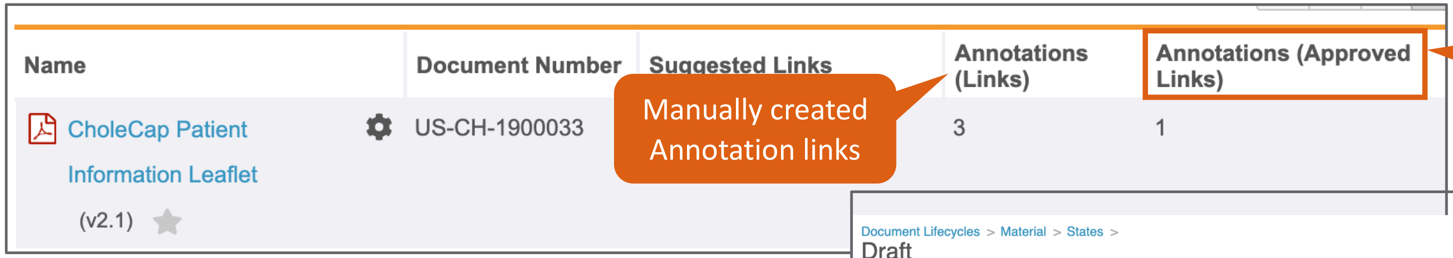
Admins can uncheck the 'Exclude specific characters when matching Annotation Keywords to content' to disable this feature



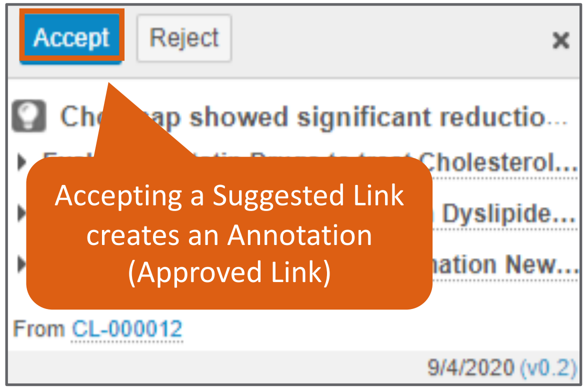
Edit Excluded text by adding or removing characters to the list

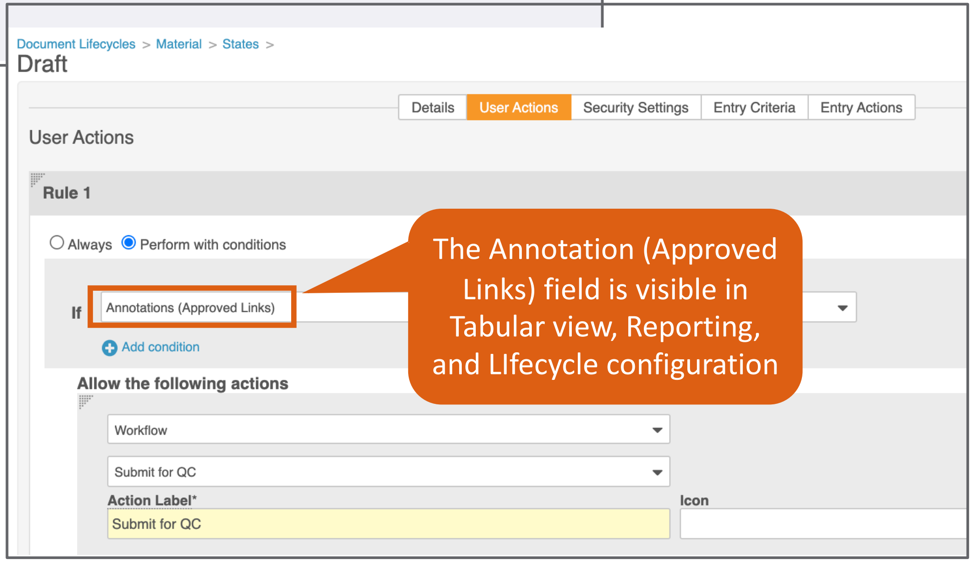
Add Annotation (Approved Links) Field

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



Approved Suggested Link annotations will be viewable as a separate field called 'Annotation (Approved Links)'





- 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 *Country* and *Product*	Lifecycle State

  - To use this action, Annotations must be:

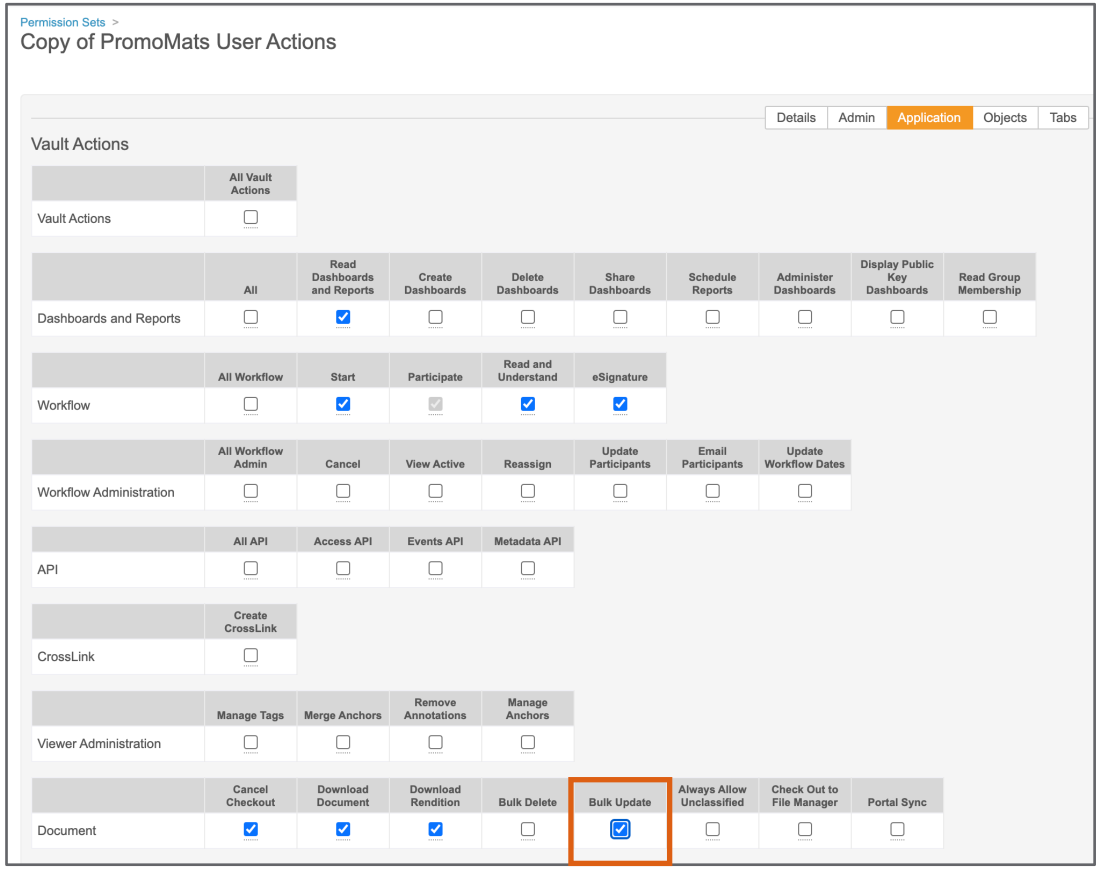
Manually created Document Links	Applied to a text selection	Direct links to documents or anchors

  - 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



Create Claims from Link Annotations

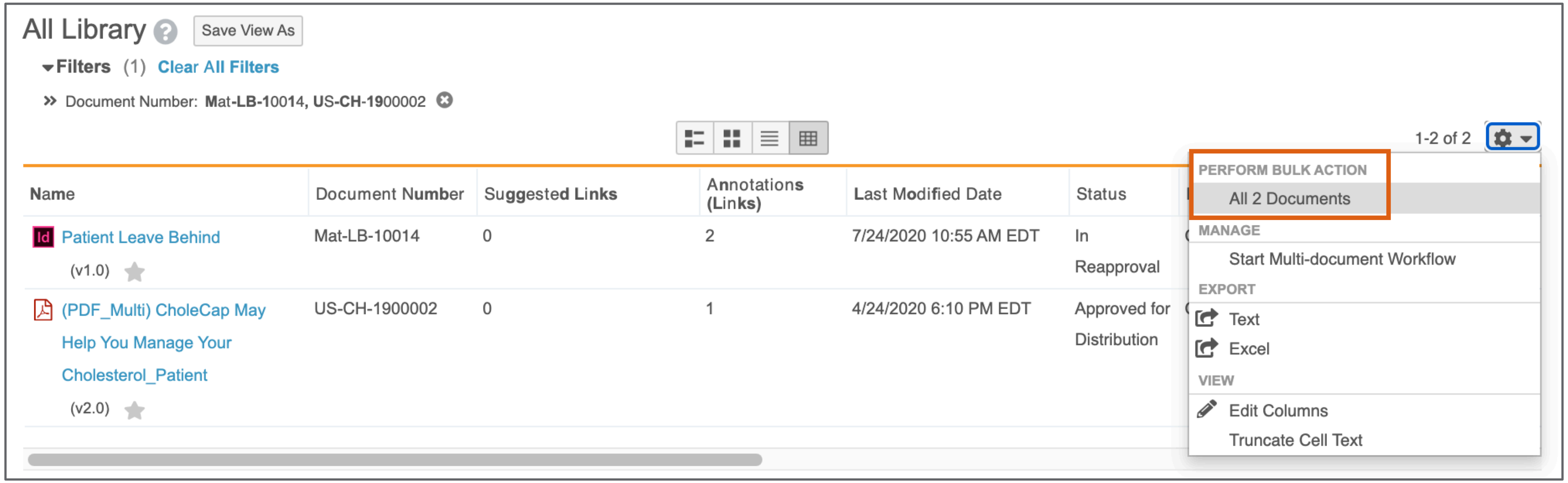
- Before you begin, you may wish to edit 1_annotation_keywords__sys.csv in one or more of the following ways:
  - If you have added required fields to the Claim Object: Add columns and values for any required Claim fields not already present in the CSV
  - Edit other specific values – for example, you 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

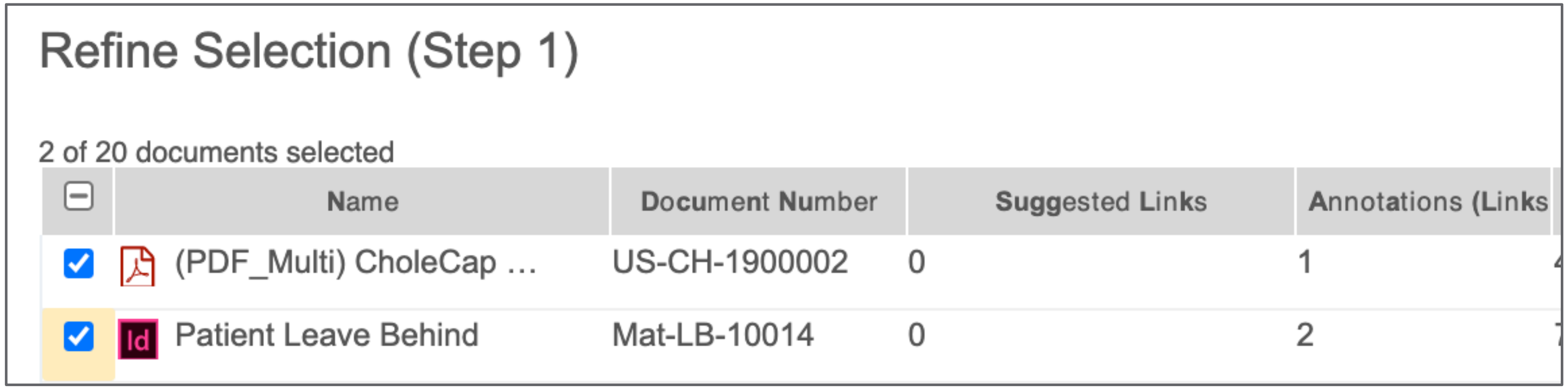
create_from_annotation_id__sys	match_text__sys	product__v	state__v	create_from_annotation_source__sys	Reference: Source Document State
63946_386	CholeCap may be effective in controlling your cholesterol[1]	00P000000000501	approved_state__sys	1520_0_1	Approved

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

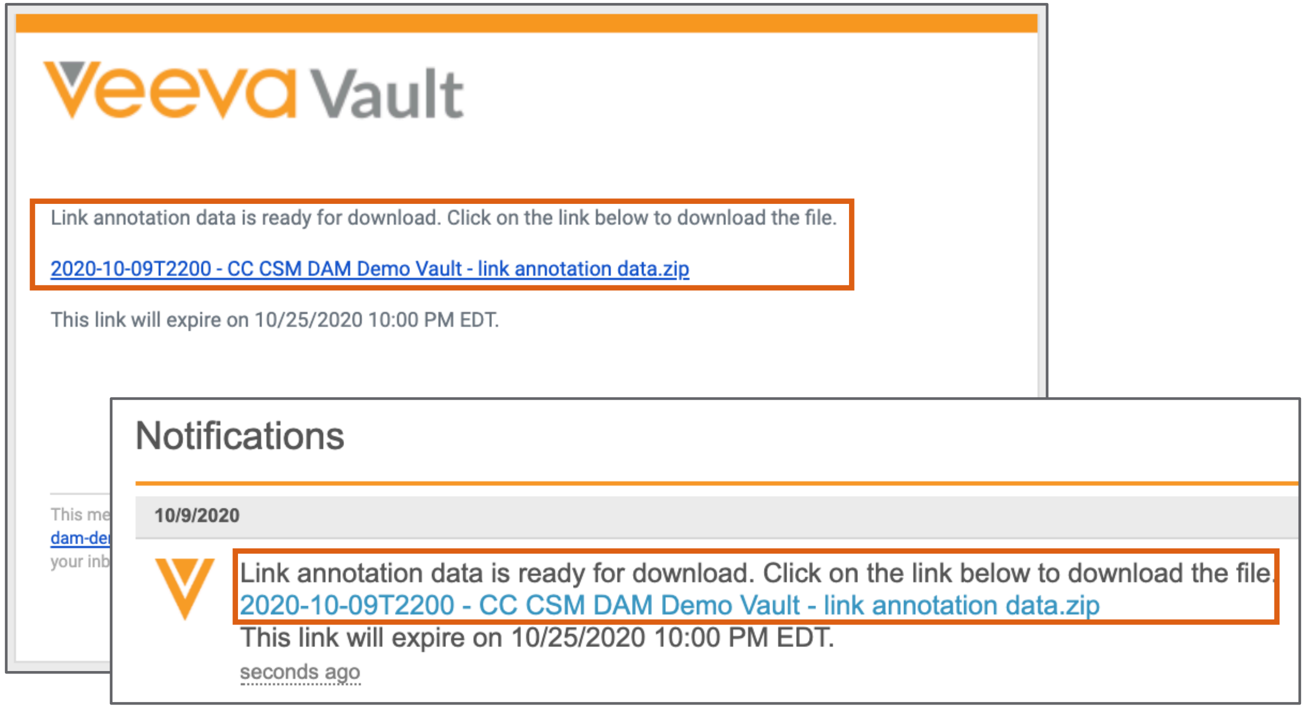
- Extracting link annotation data
  1. Select Documents and Refine selection as needed

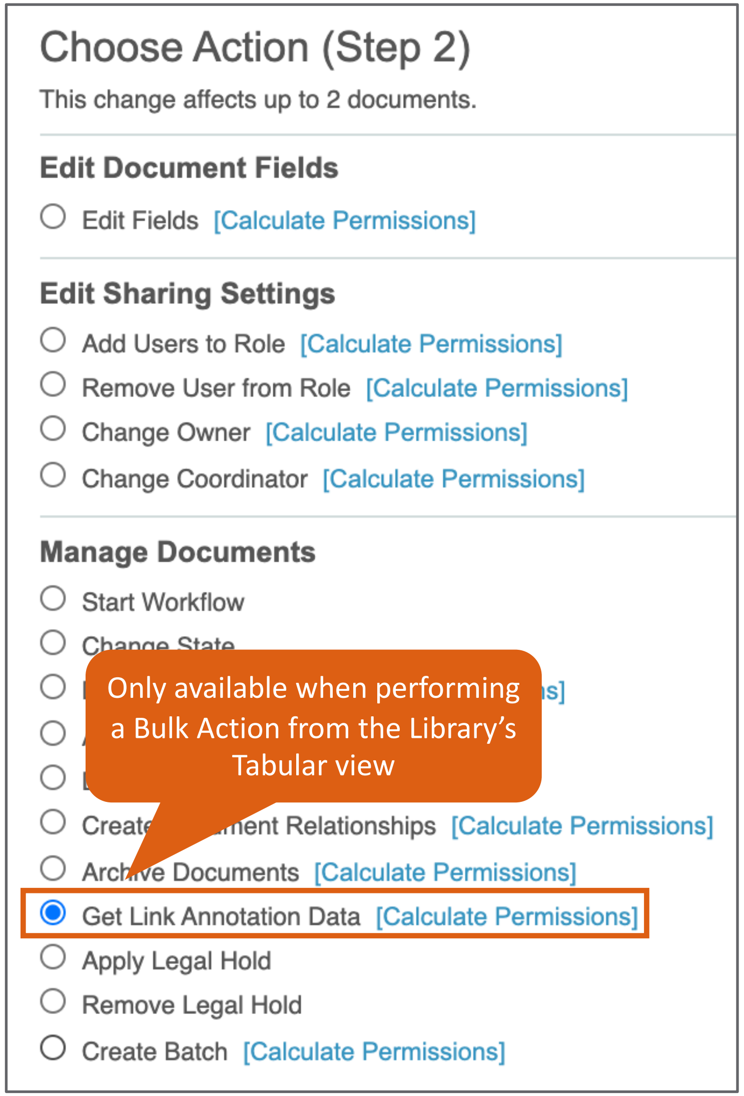




Create Claims from Link Annotations

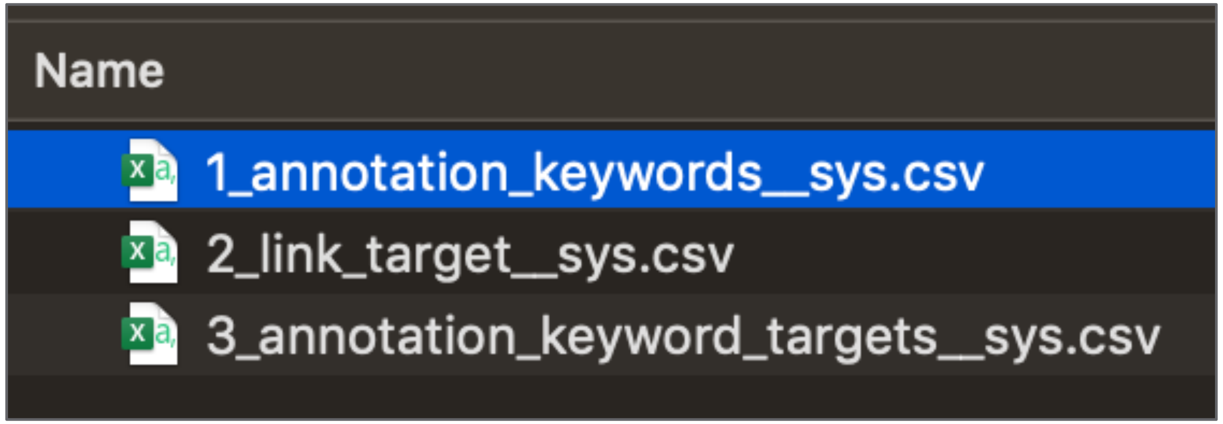
2. From the Choose Action page, select Get Link Annotation Data
3. Click Next to open the Confirmation page and review the summary of selected documents
4. Click Finish
5. You will receive a Notification and an email with a link to download a ZIP file when the export is complete





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



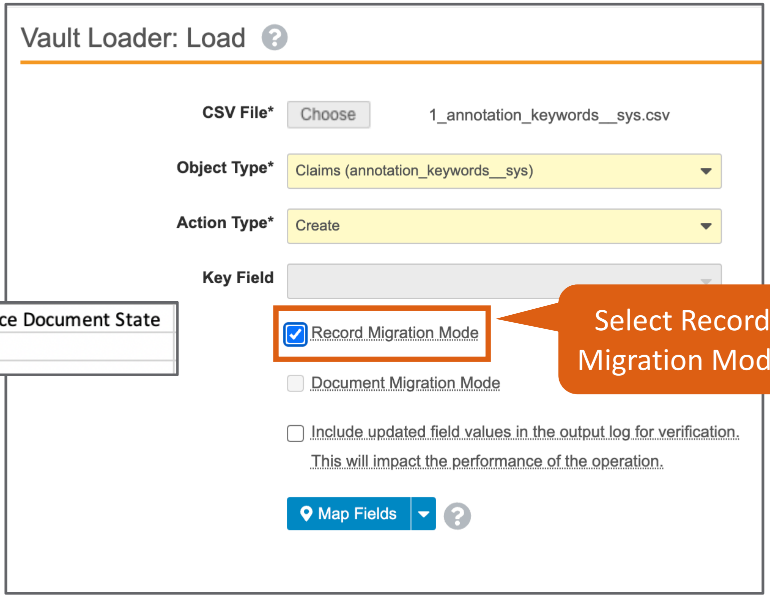
Create Claims from Link Annotations

- 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



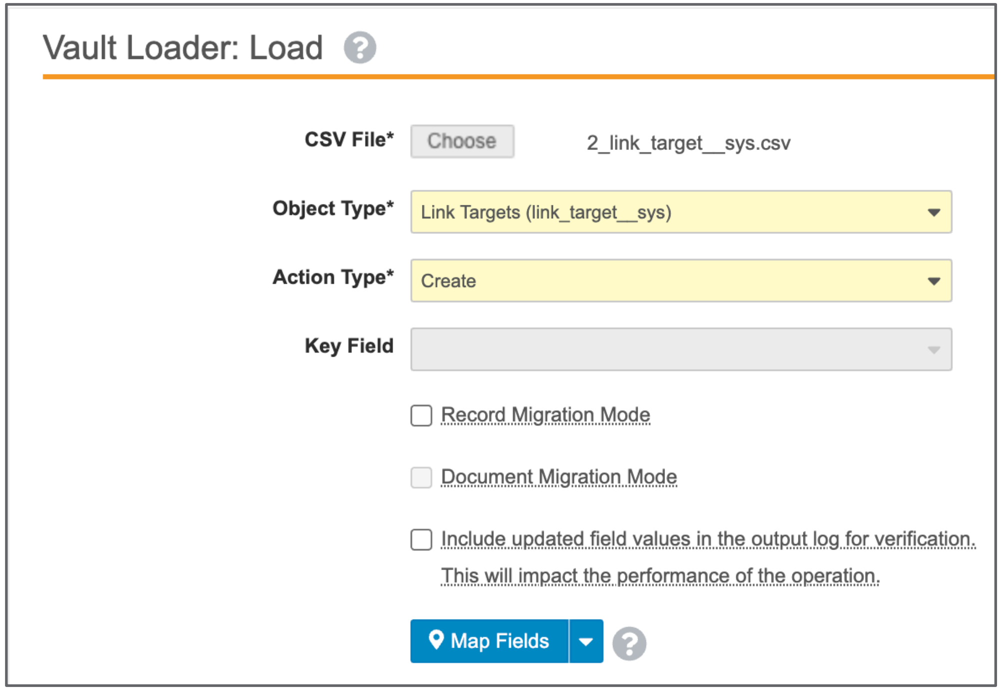
Select Record Migration Mode

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

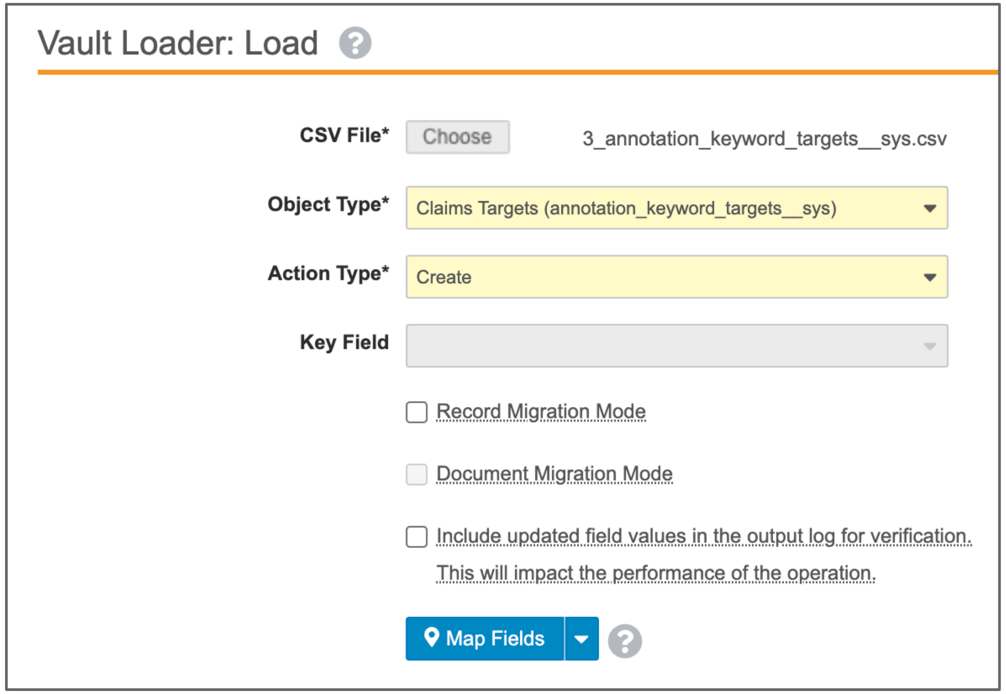
- Creating *Link Target Records* using Vault Loader
  1. Click the Choose button in the CSV File fields and select 2_link_target__sys.csv
  2. From the Object Type dropdown, select Link Targets (link_target__sys)
  3. From the Action Type dropdown, select Create
  4. Click the Start Load button



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

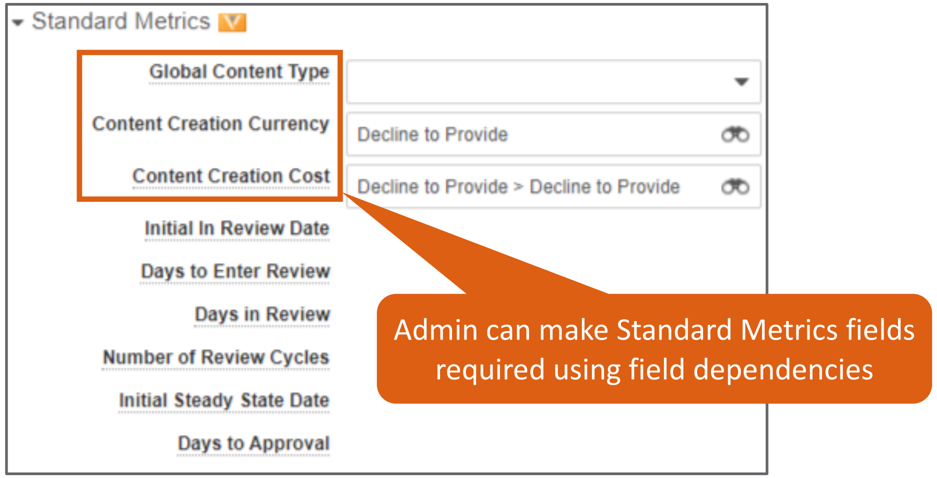


Claim Target records join Claim records to Link Target records.

Auto-On: Working with Documents

Configurable Standard Metrics

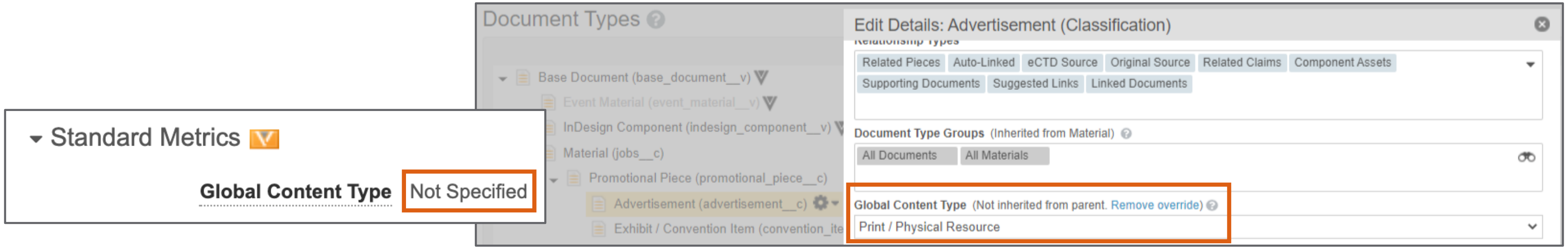
- Overview
  - The three user input fields for Standard Metrics will no longer be required by default
    - Global Content Type
    - Content Creation Currency
    - Content Creation Cost



  - 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

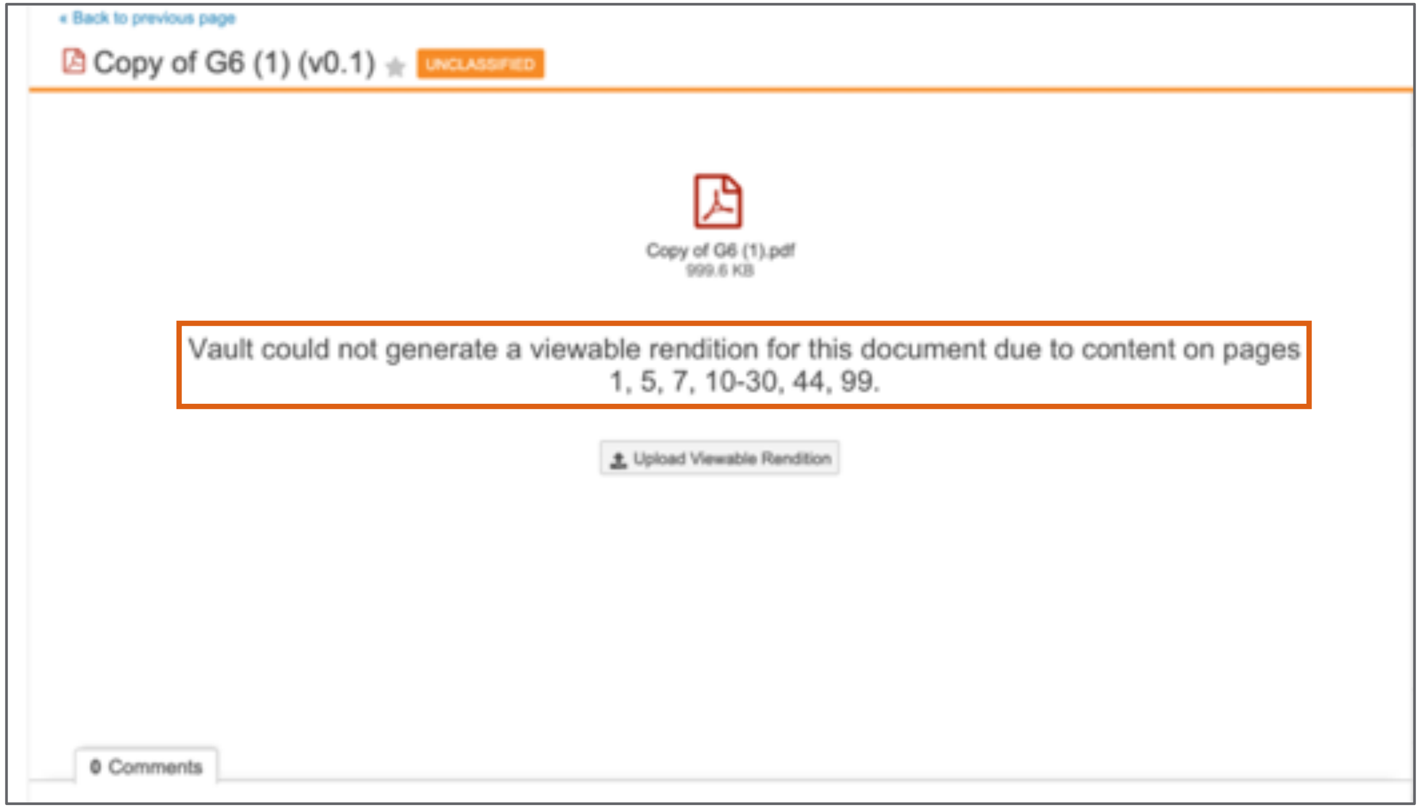
- Overview
  - When 20R3 releases, an asynchronous job called Standard Metrics GCT Mapping Document Update will run *automatically* and will update any documents whose Global Content Type is *Not Specified* to a mapped GCT value



- 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]

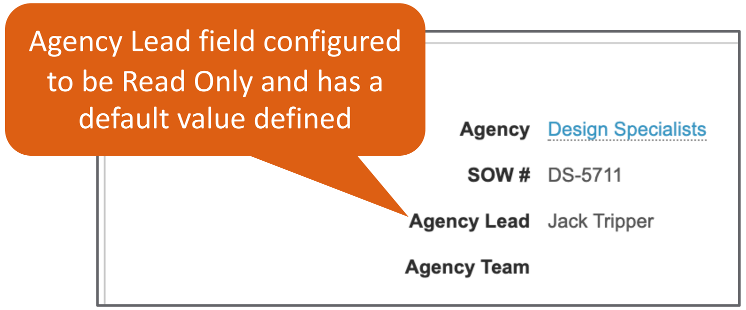
Improved Rendering Feedback

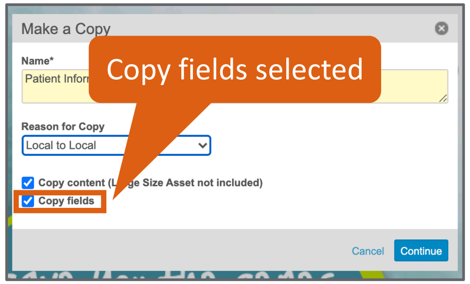
- Overview
  - Vault will now detect the content in documents that is the cause of rendering failures and provide users with error messages to troubleshoot issues

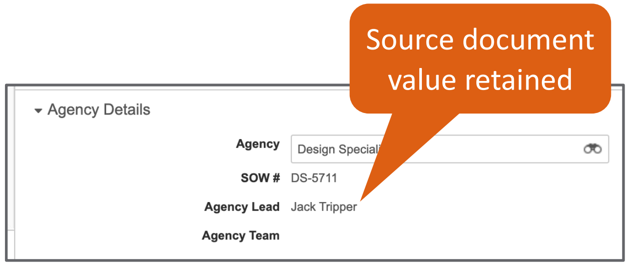


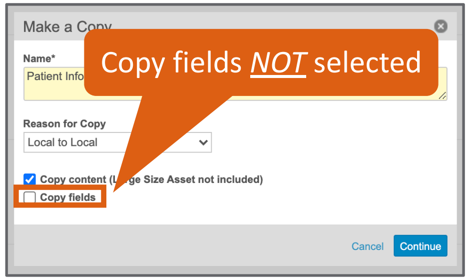
Changes to Make a Copy for Read-Only Fields

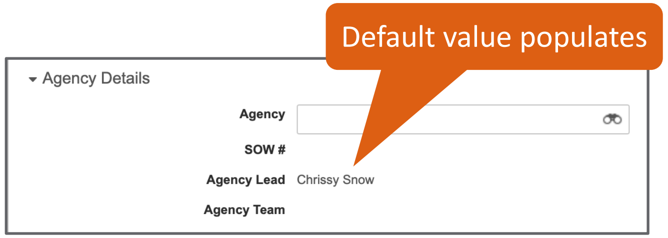
- Overview
  - Prior to 20R3 Read Only fields did not retain source document values or populate with default values when making a copy of a document. Now:
    - If ‘Copy Fields’ is selected, Read Only fields will always retain the original document field value
    - If ‘Copy Fields’ is not selected,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







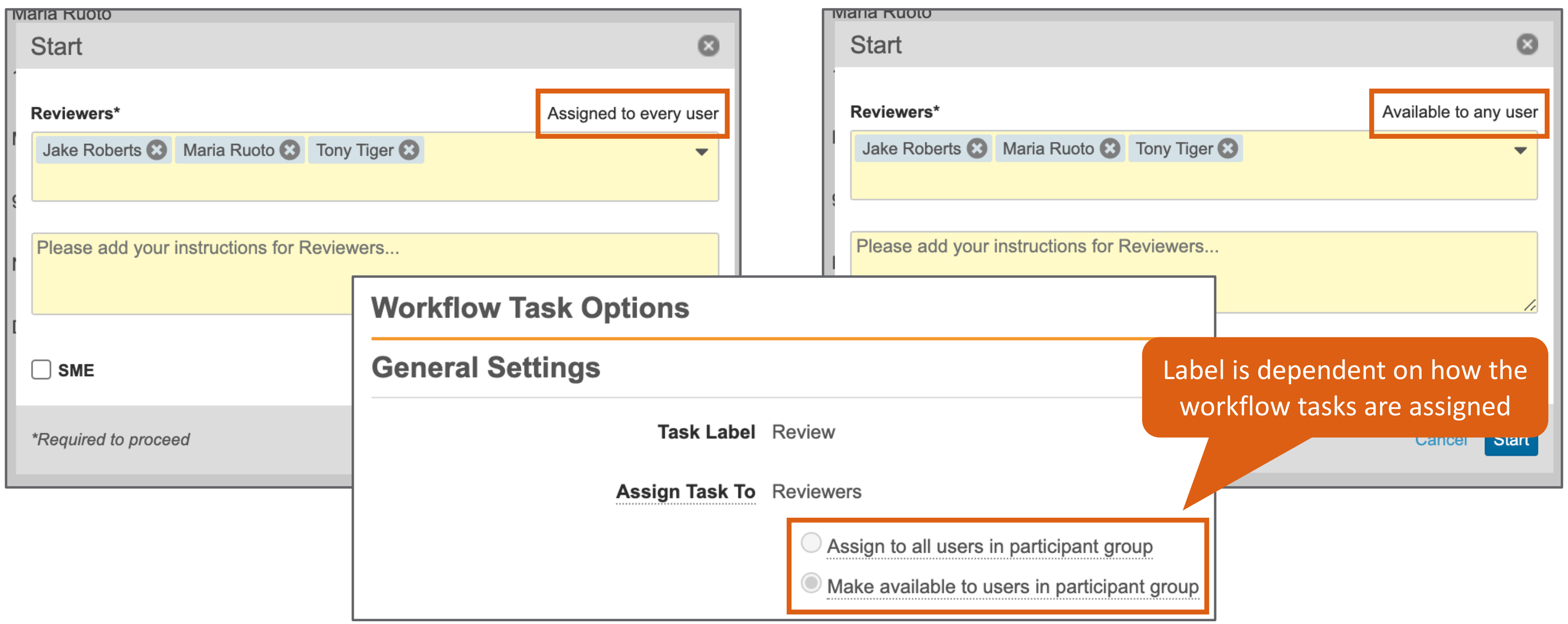




** If one has been configured by the Admin*

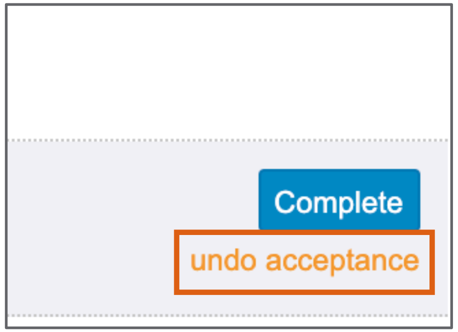
Participant Control Help Labels

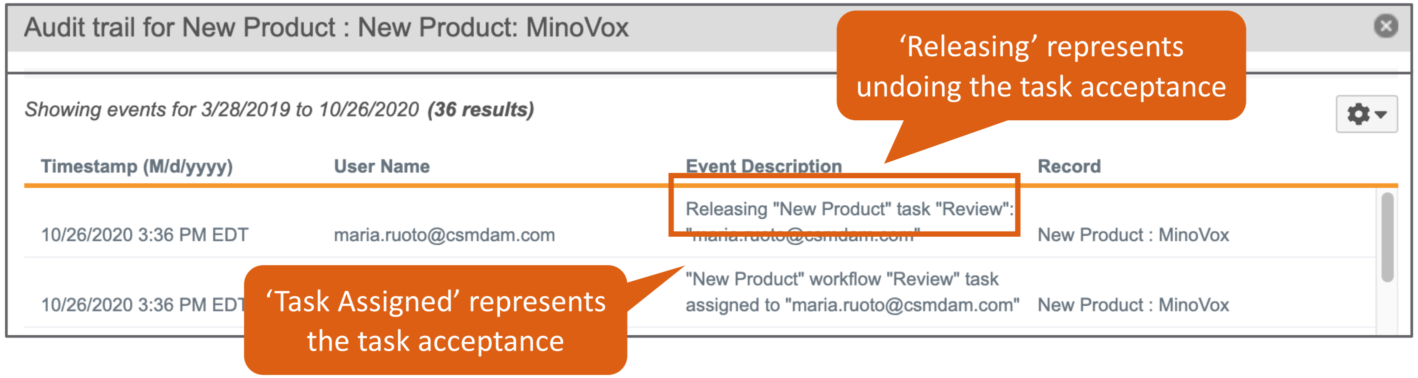
- Overview
  - Workflow initiators for Object and Multi-Document Workflows now see the label Assigned to every user or Available to any user on the participant control at the start of the workflow
- Considerations
  - The label that is displayed is based on whether tasks in the workflow use the Assign 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

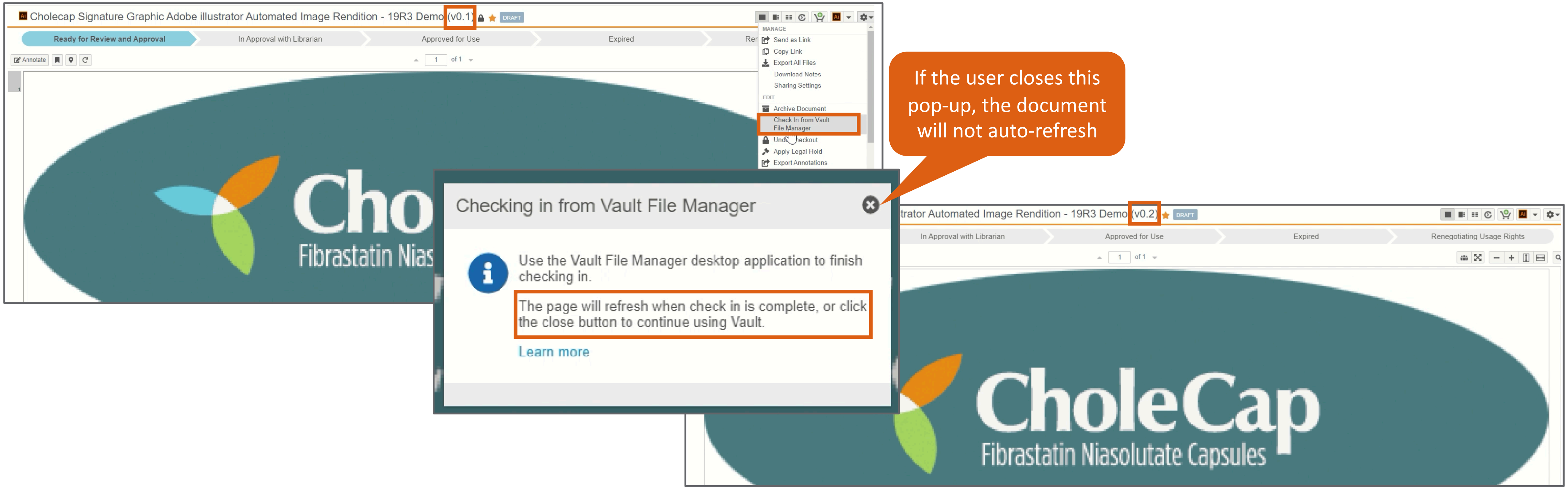




Auto-On: Vault File Manager

Vault File Manager: Auto-Refresh When Checking In

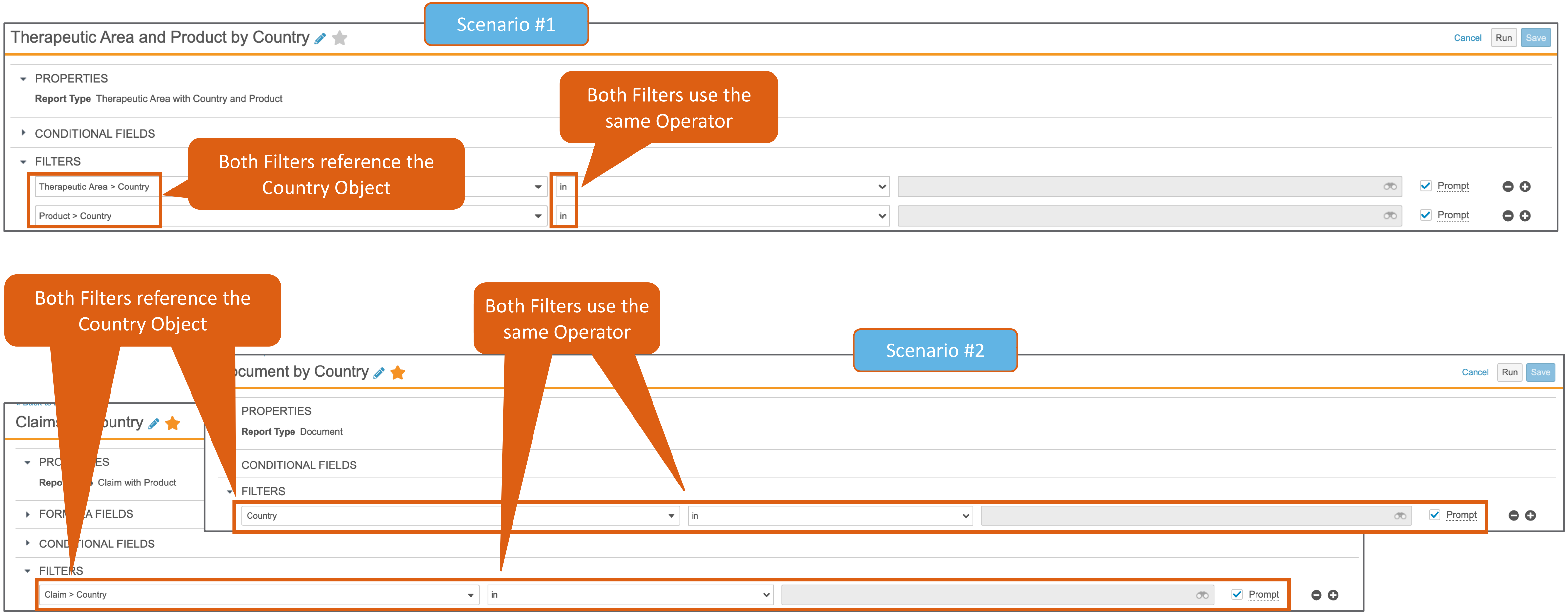
- Overview
  - When a user uses the Check In from Vault File Manager feature, found in the document action menu, Vault will now auto-refresh to the latest version
- Considerations
  - Prior to 20R3 users had to manually fresh the document viewer to see the latest version
  - If the user closes the pop-up, the document page will not auto-refresh



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

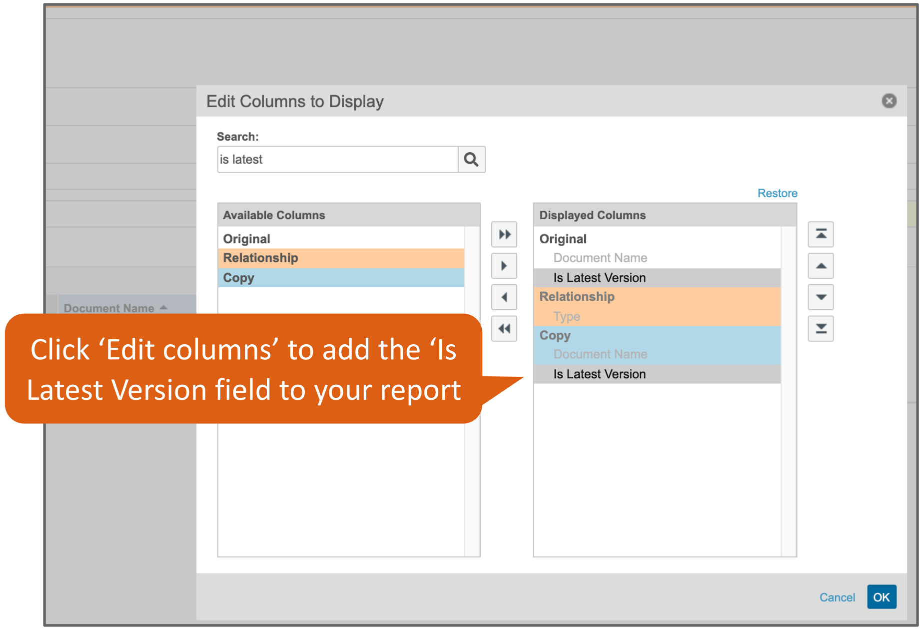


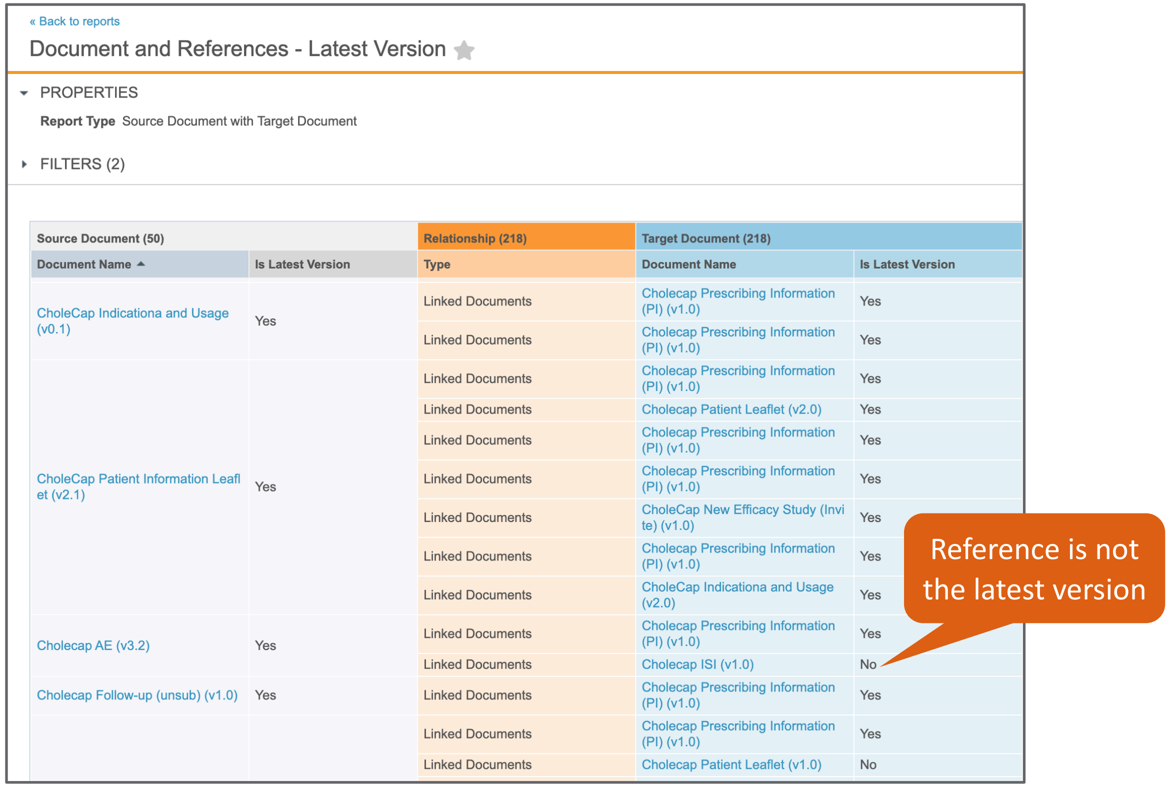
Reporting: Combine Dashboards Prompts

- 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

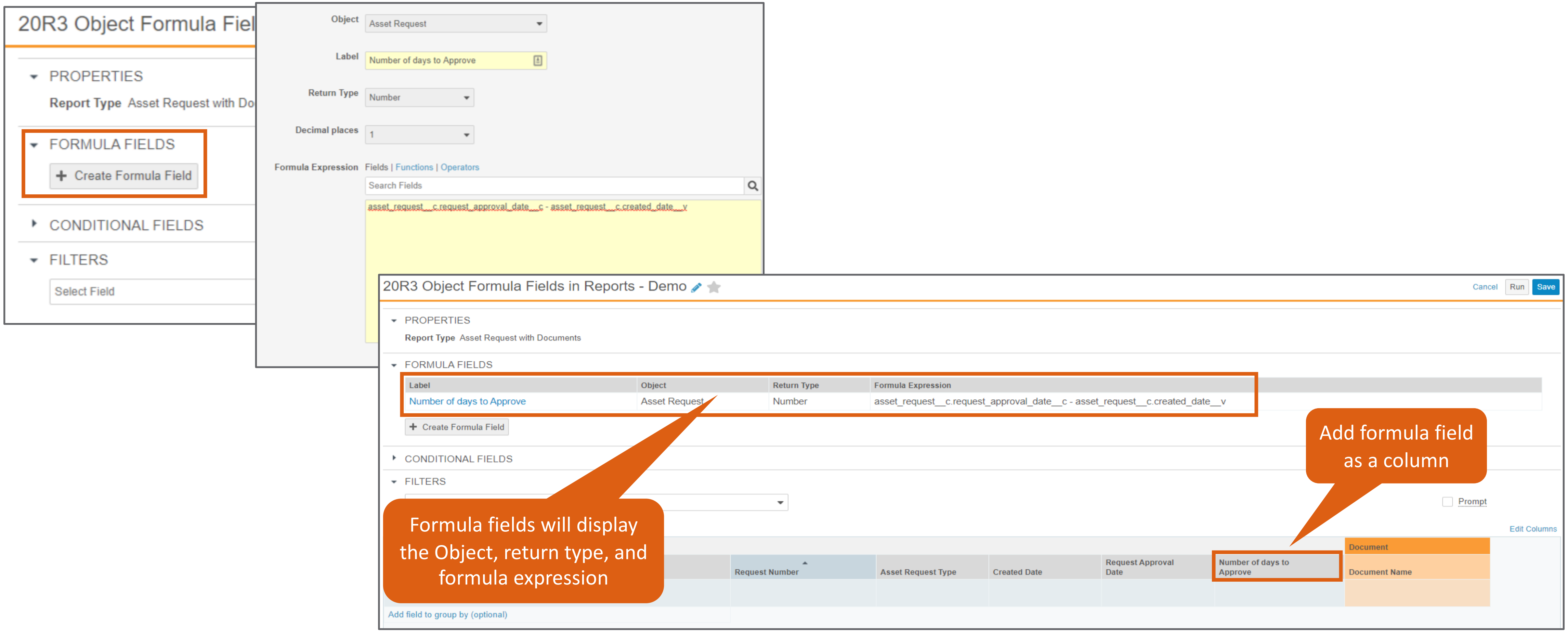




Source Document (50)		Relationship (218)	Target Document (218)	
Document Name	Is Latest Version	Type	Document Name	Is Latest Version
CholeCap Indicationa and Usage (v0.1)	Yes	Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
CholeCap Patient Information Leaflet (v2.1)	Yes	Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	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 New Efficacy Study (Invite) (v1.0)	Yes
		Linked Documents	Cholecap Prescribing Information (PI) (v1.0)	Yes
		Linked Documents	CholeCap Indicationa and Usage (v2.0)	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

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

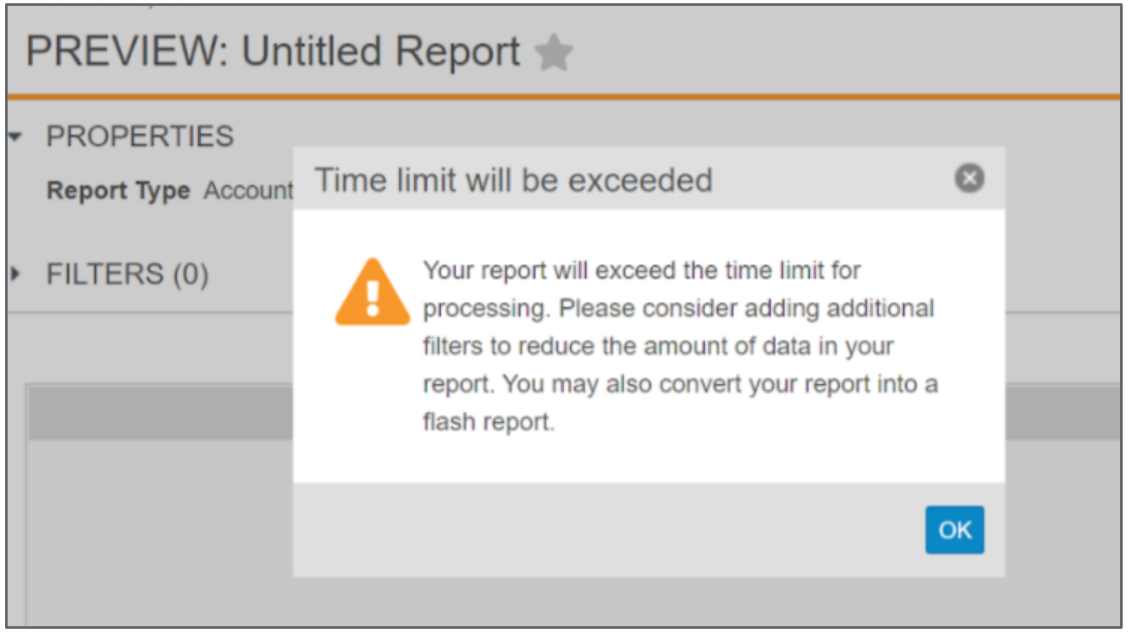


Reporting: Object Formula Fields in Reports

- 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

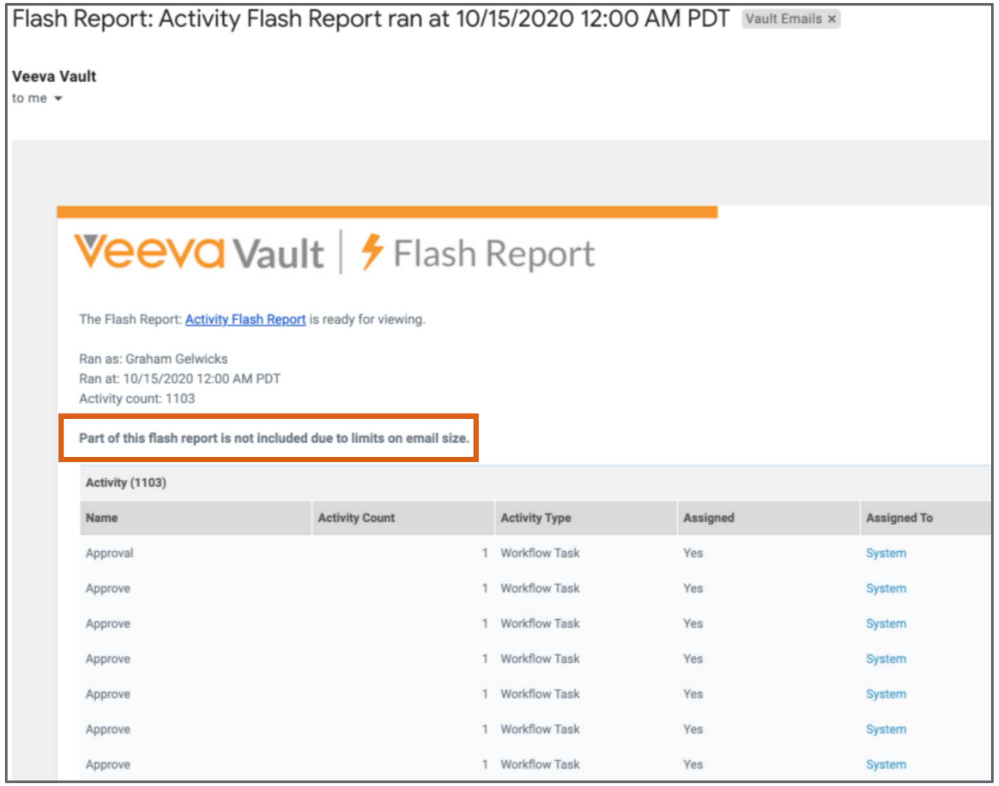
Reporting: Early Timeout Detection for Reports

- 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 ×

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.

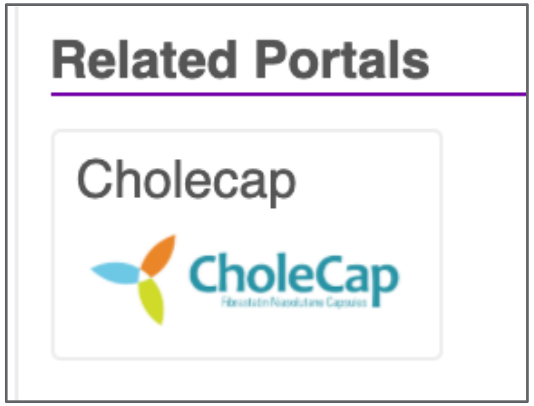
Activity (1103)

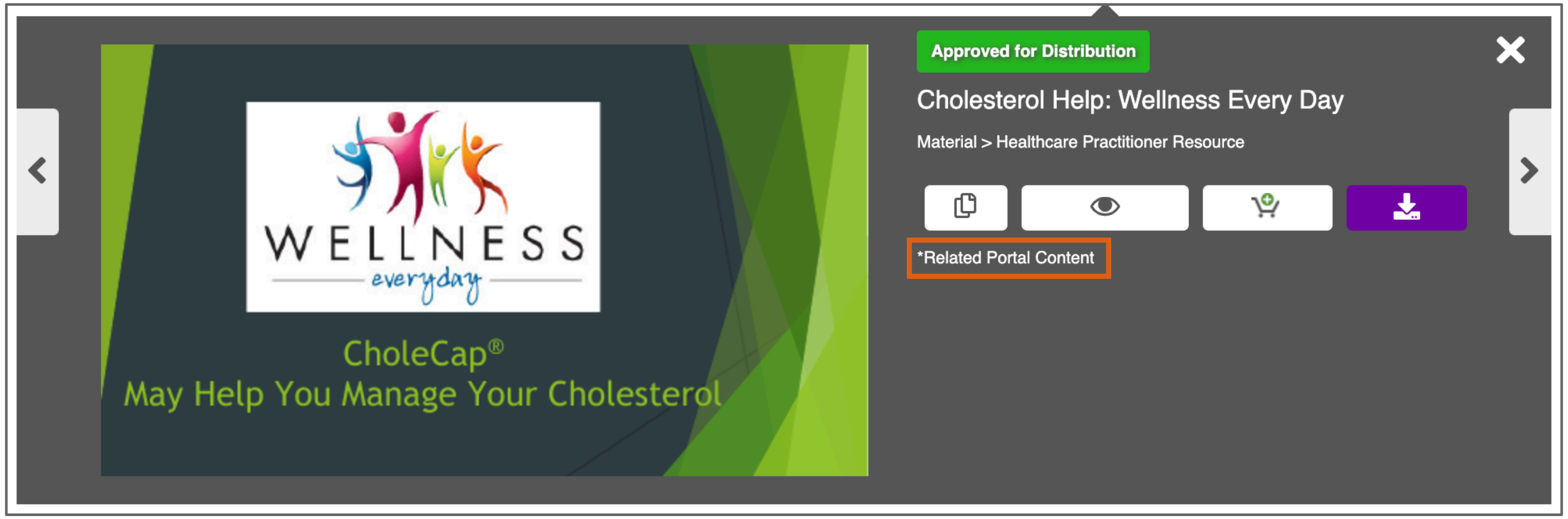
Name	Activity Count	Activity Type	Assigned	Assigned To
Approval	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System
Approve	1	Workflow Task	Yes	System

Configuration: Portals

Portals: Related Portals

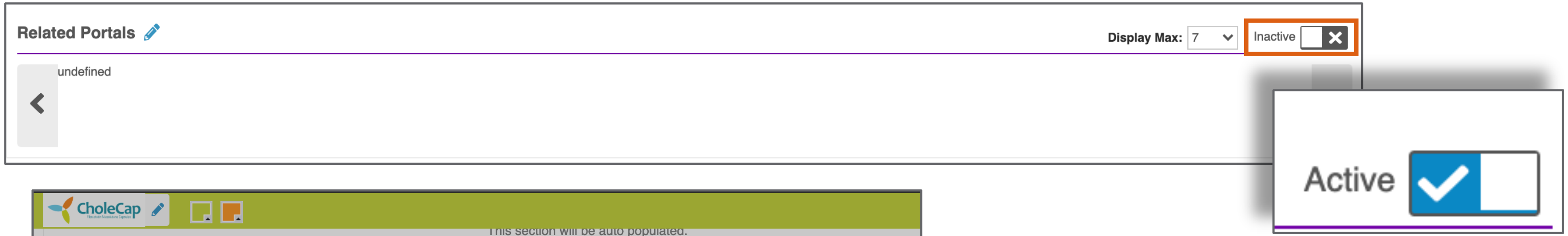
- Overview
  - This feature allows Portal Admins to associate multiple Portals, allowing users to filter and search results from the current and any related Portals
- Considerations
  - The Related Portals widget will be inactive by default; it must be made active by a Portal Admin
  - The Related Portals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

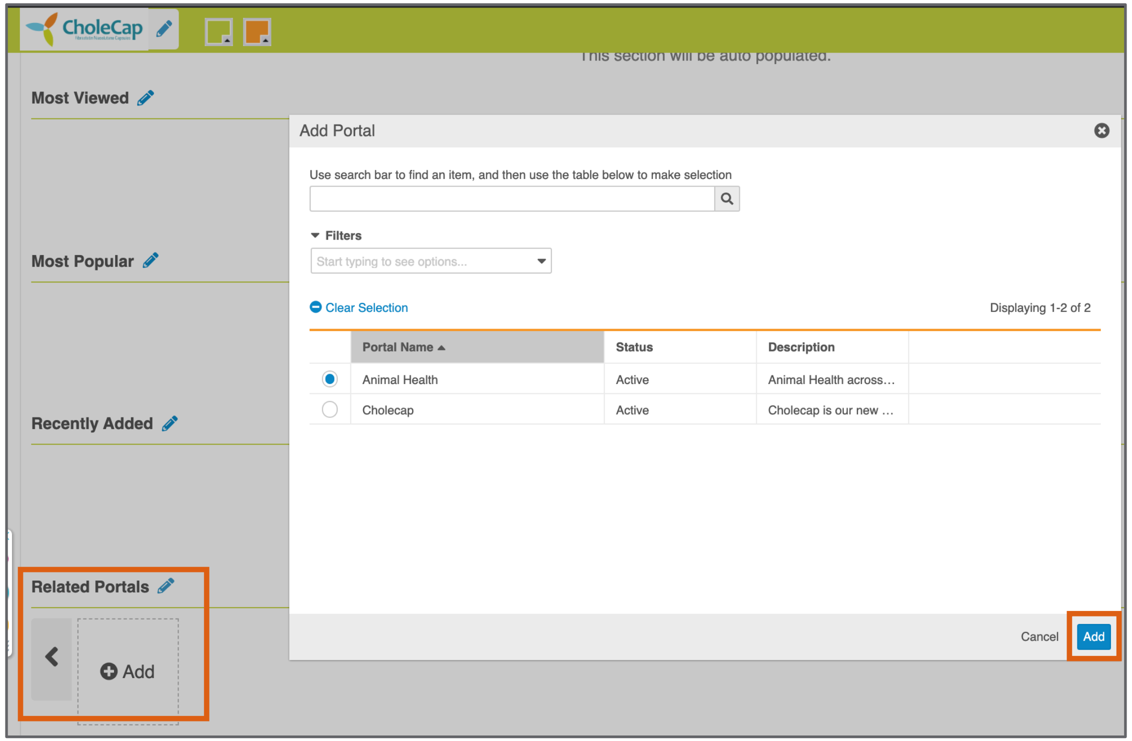


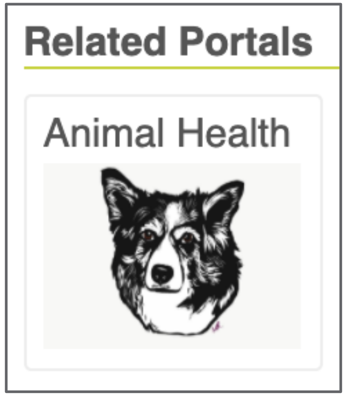


Portals: Related Portals

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







Configuration: Object & Multi-Document Workflows

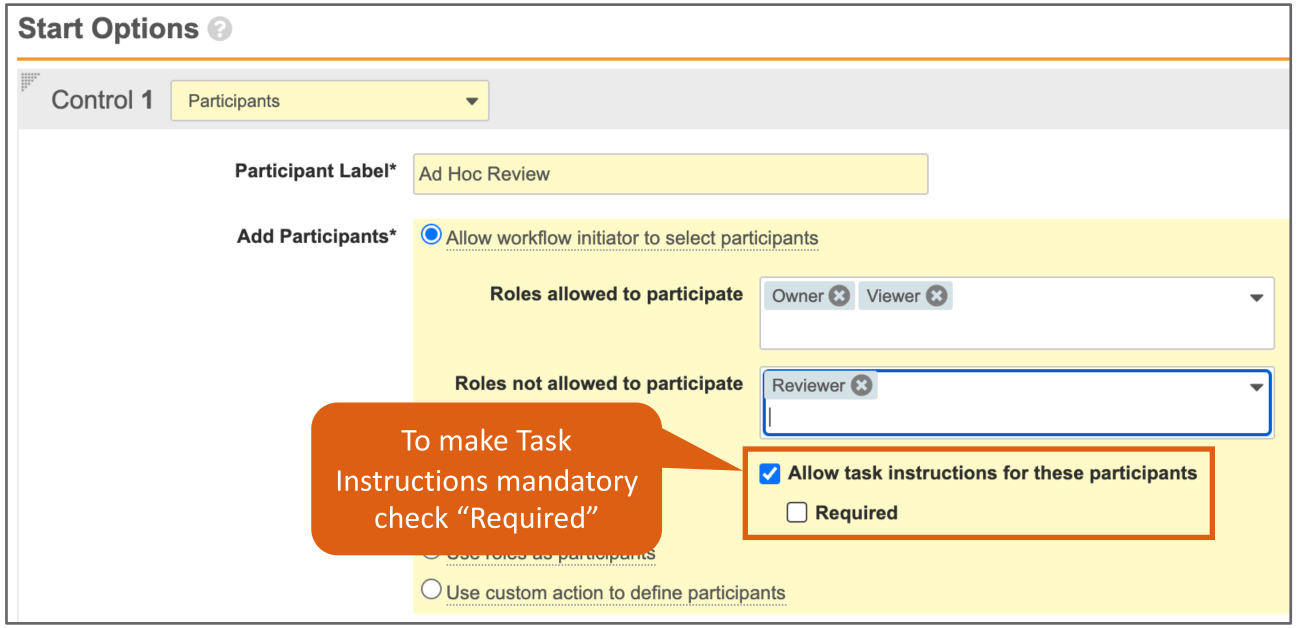
Multi-document workflows (MDW) allow you to send one or more documents out for review and apprval on a single workflow instance.

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

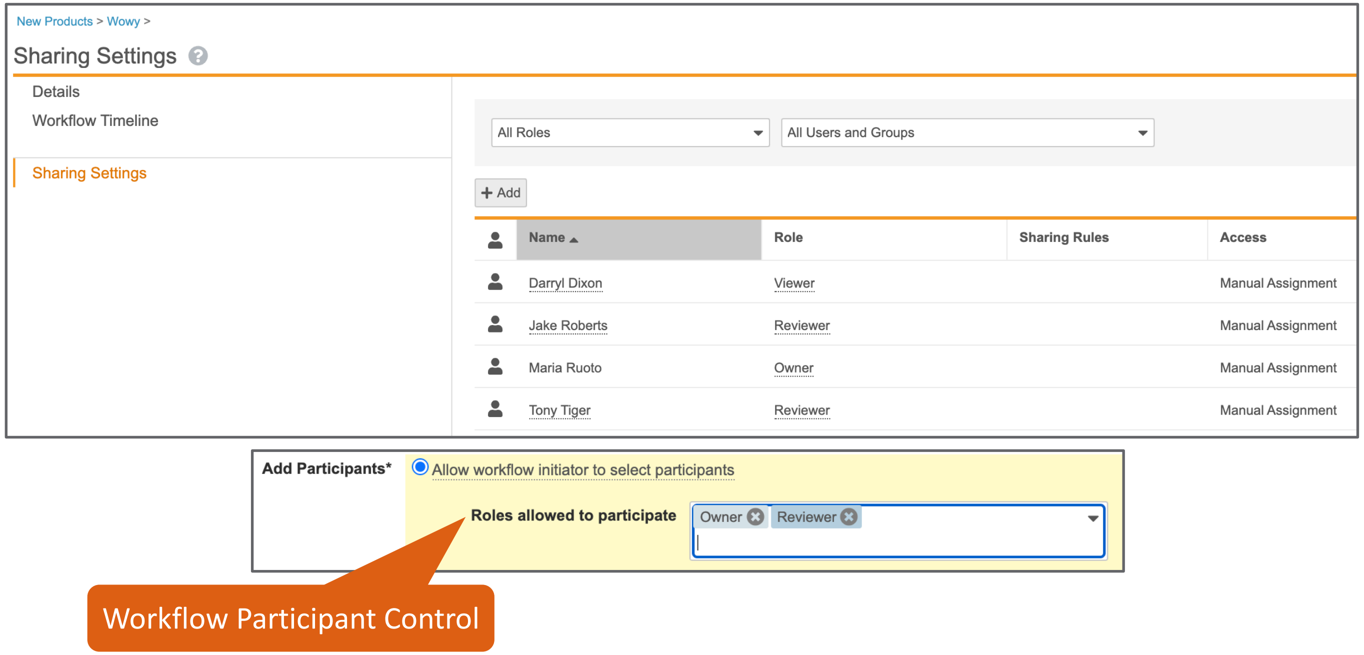
Ad Hoc Task Instructions

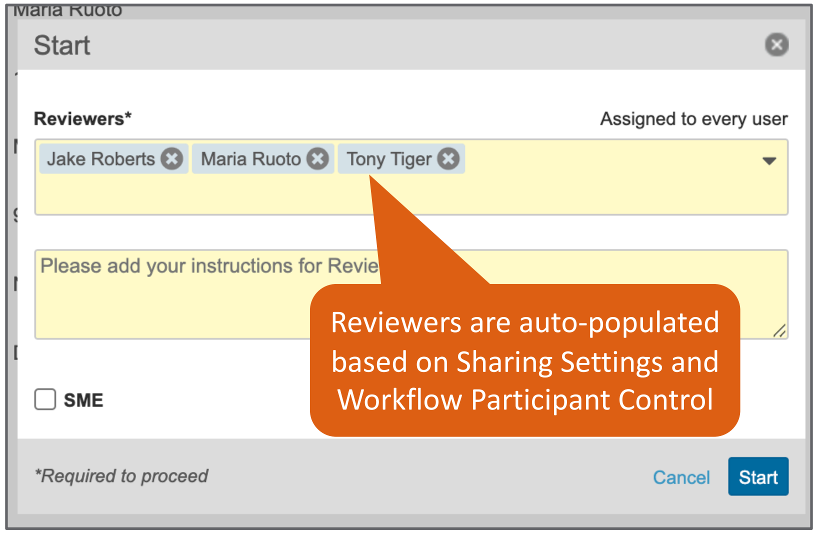
- Use Case
  - Workflow initiators can provide additional instructions to each user group
- Configuration
  - *Start Step*: Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > Start > Edit > Add Control
  - *Object Message*: Admin > Configuration > Object Messages >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



Default Users from Sharing Settings

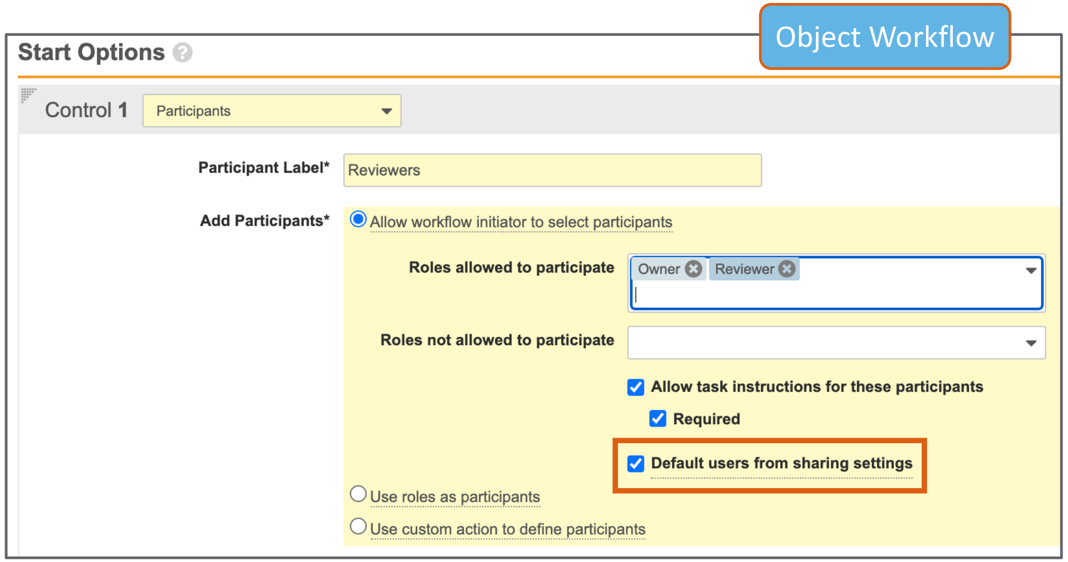
- Overview
  - Admins can now configure Object and Multi-Document Workflows to auto-populate users and groups at the workflow start step based on their roles
    - For example, if the Reviewer and Owner roles are allowed to participate in the Review Task, users assigned those roles in the Sharing Settings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

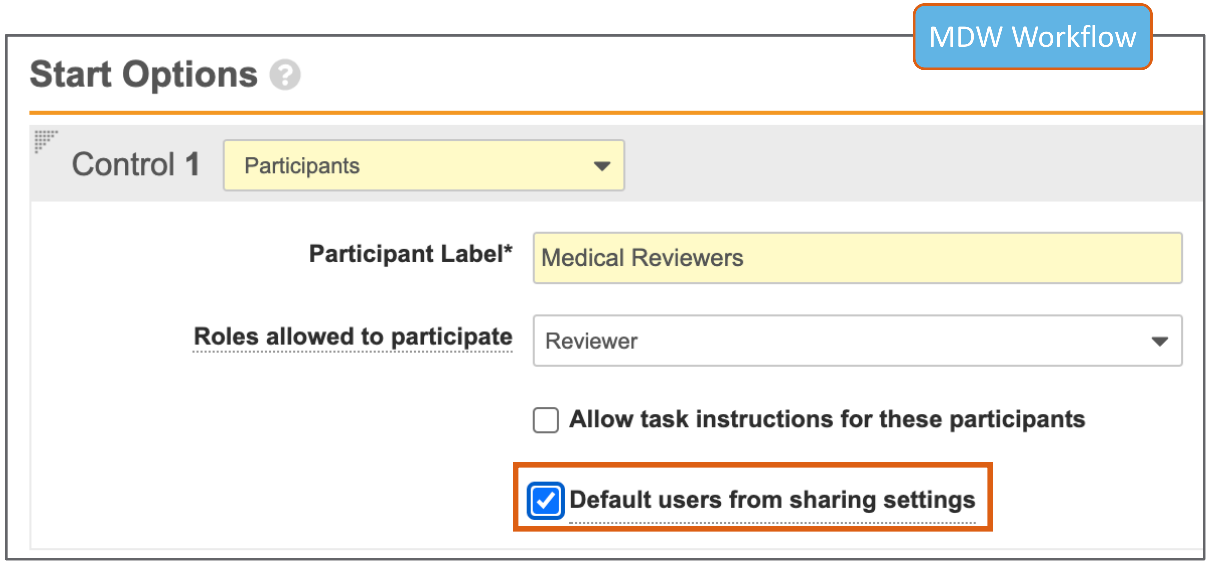




Default Users from Sharing Settings

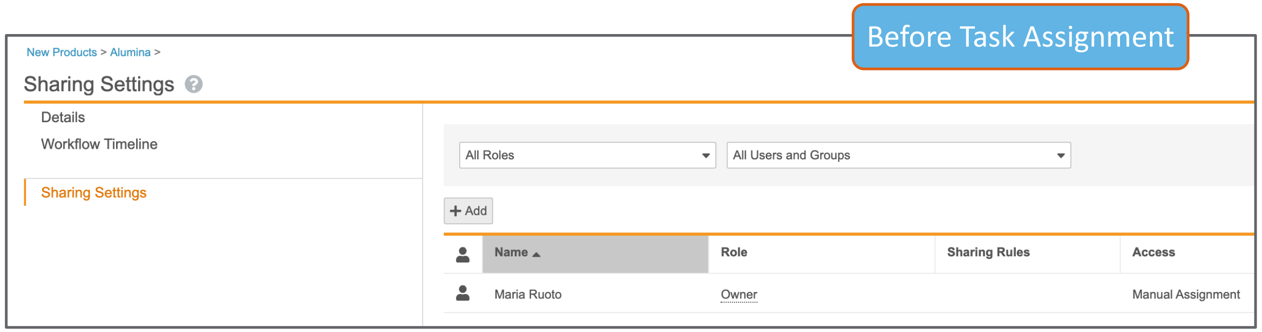
- Configuration
  - Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > [Workflow Start Step] > Edit > Default users from sharing settings

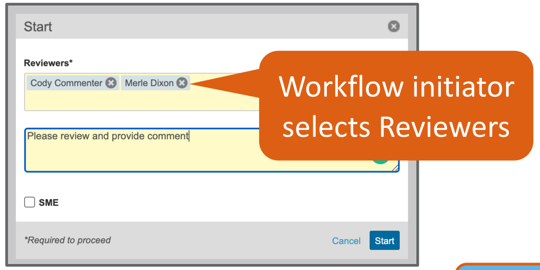


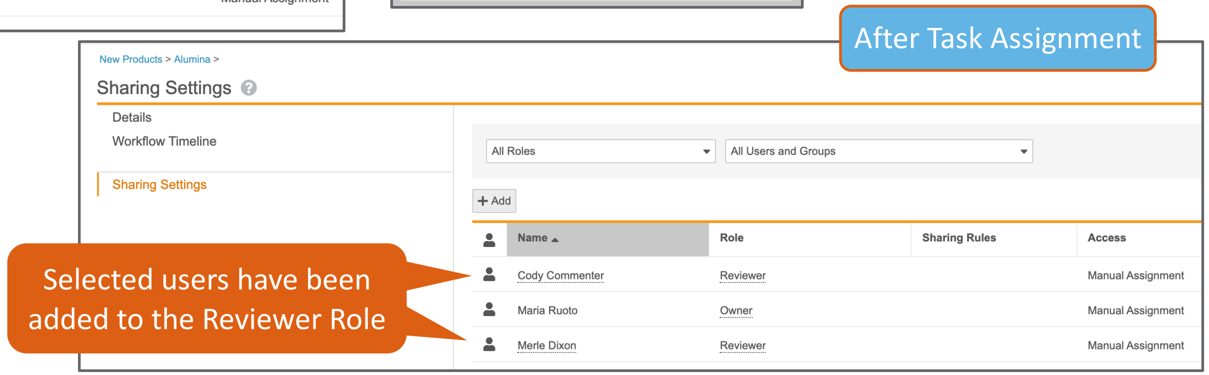


Update Sharing Settings in Task Step

- 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 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

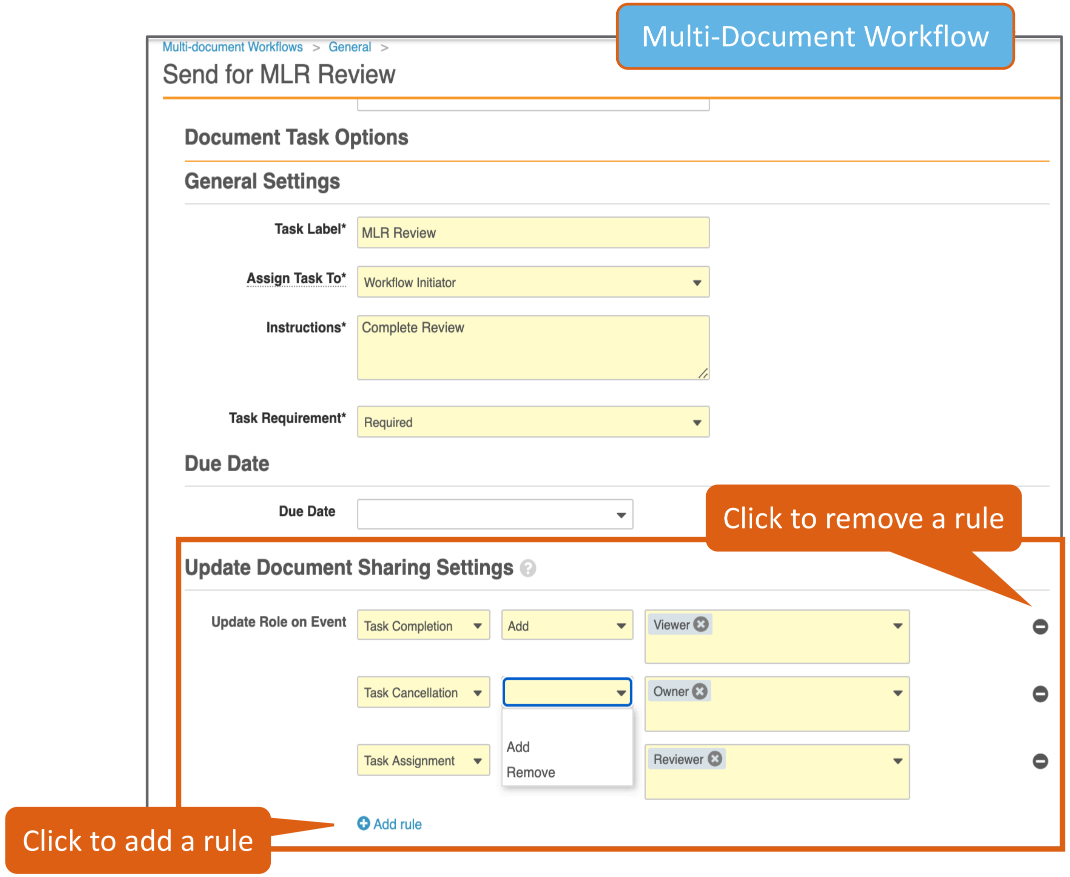


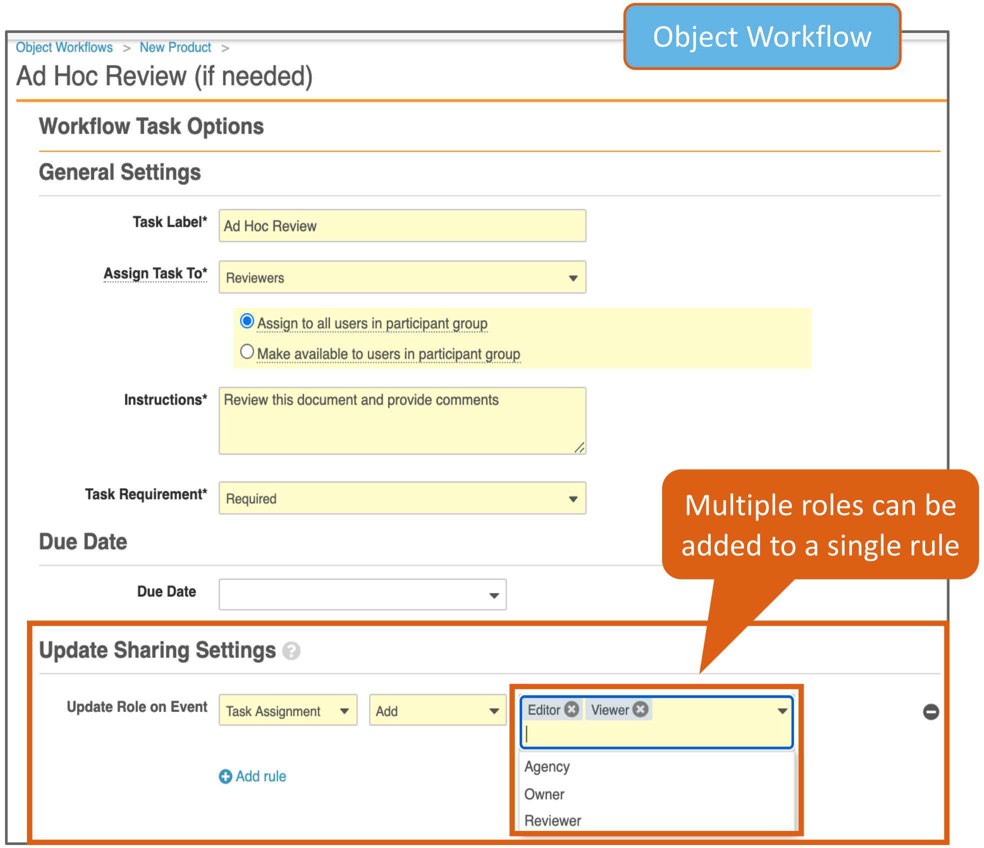




Update Sharing Settings in Task Step

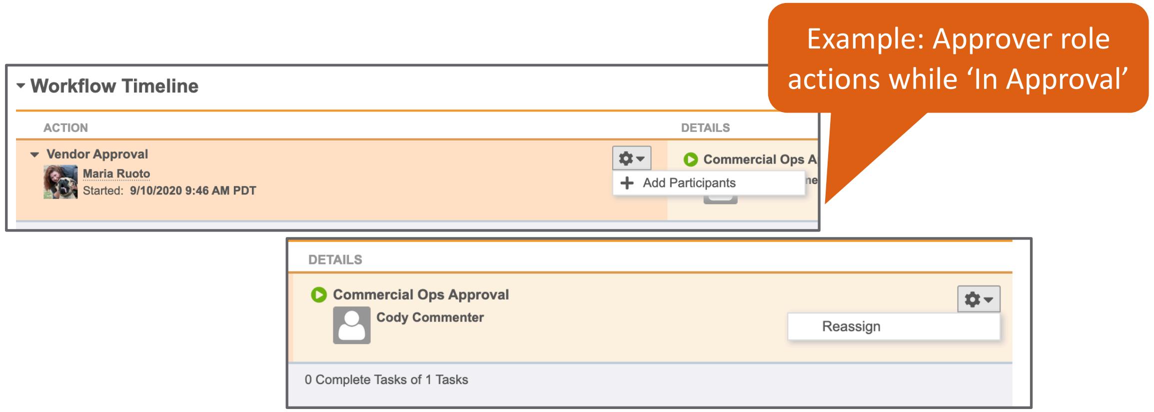
- Configuration
  - Admin > Configuration > [Object Workflows or Multi-Document Workflows] > [Workflow] > [Workflow Task] > Edit > [Update Sharing Settings or Update Document Sharing Settings]

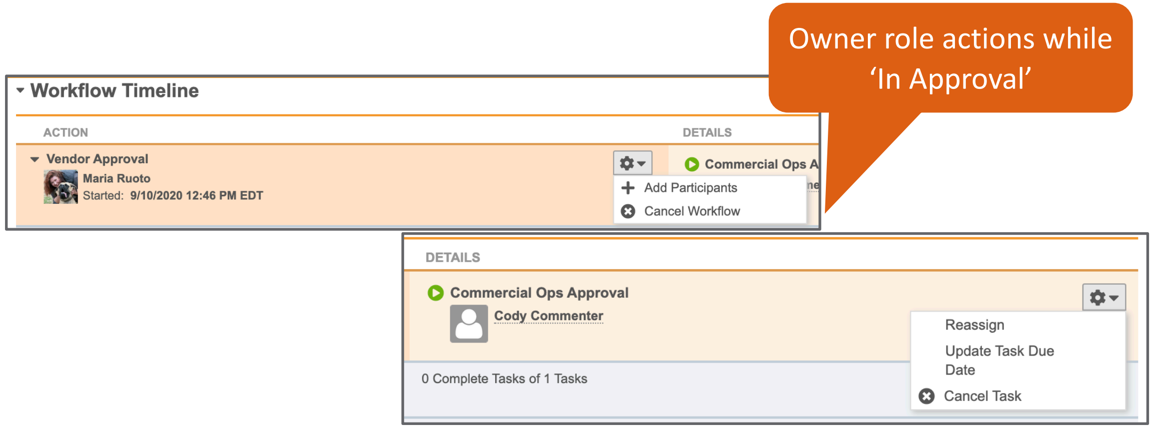




Atomic Security for Active Workflow Actions

- 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





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

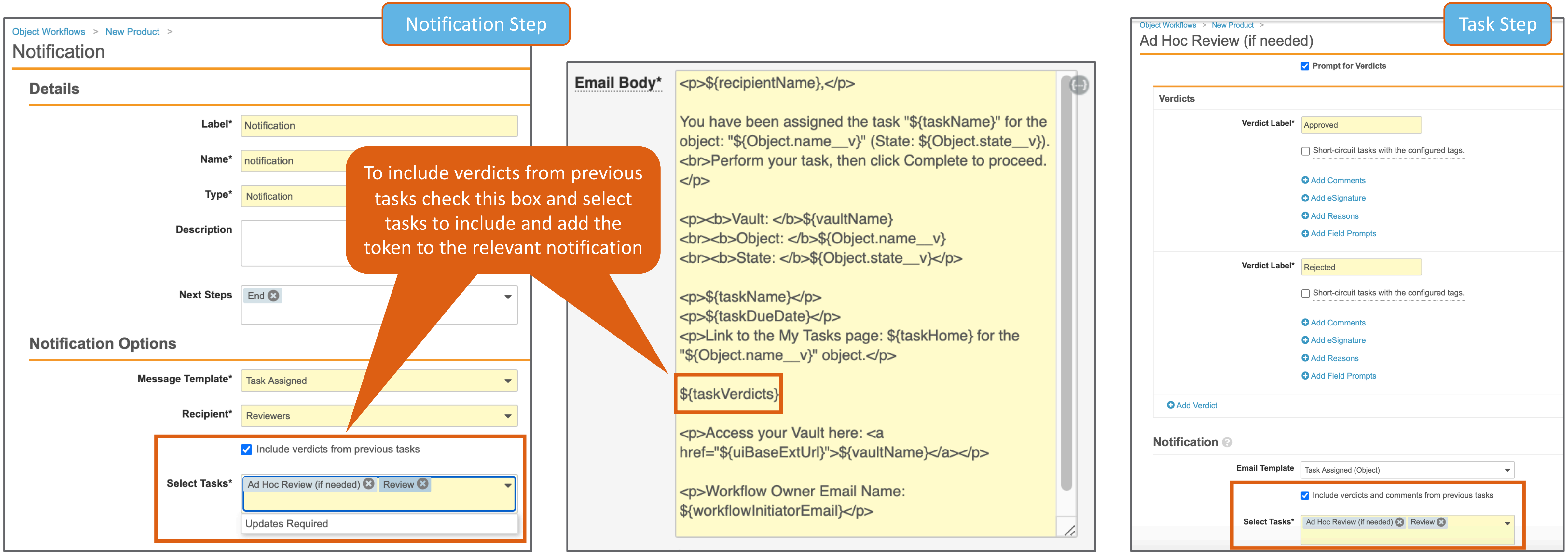
Behavior Options:
Execute: Allows users to see and click on the action
Hide: The action is never visible to users

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

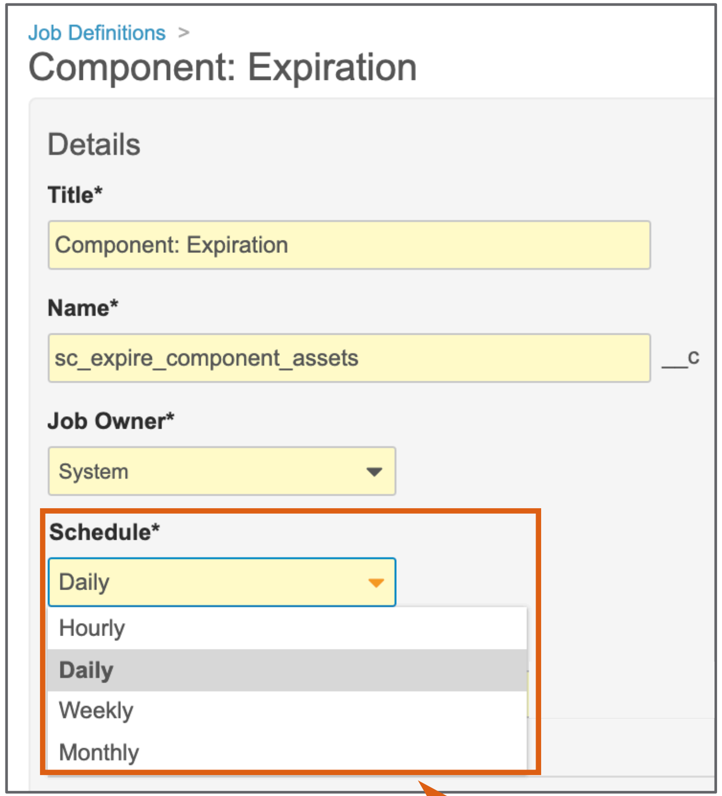
- Configuration
  - Admin > Configuration > Object Messages > [Message]
  - Admin > Configuration > [Object Workflow] > [Notification Step] or [Task Step]
  - Admin > Configuration > [Multi-Document Workflow] > [Notification Step] or [Task Step]



Admin

Flexible Job Scheduling

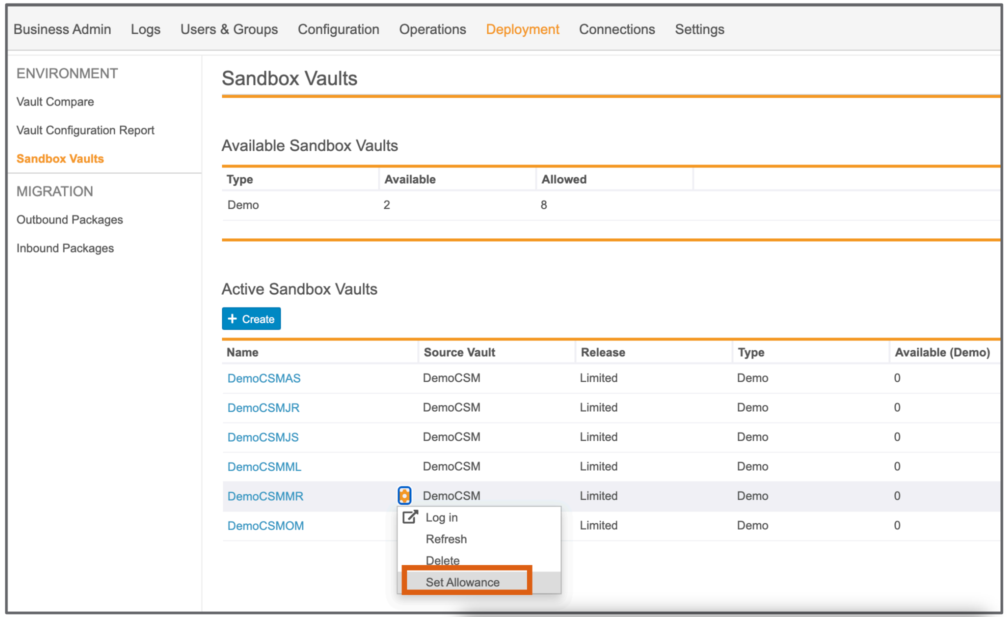
- Overview
  - Job scheduling options have been expanded to allow Admins to schedule jobs to run on an hourly, daily, weekly, or monthly basis
- Considerations
  - This feature is available to Admins automatically when creating or updating Job Definitions
- Where to find
  - Admin > Operations > Job Definitions
- Learn more about configuring Job Definitions

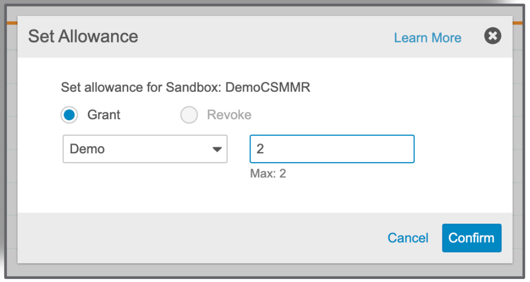


Previously, Admins could only schedule jobs to run daily

Managing Sandbox Allowances

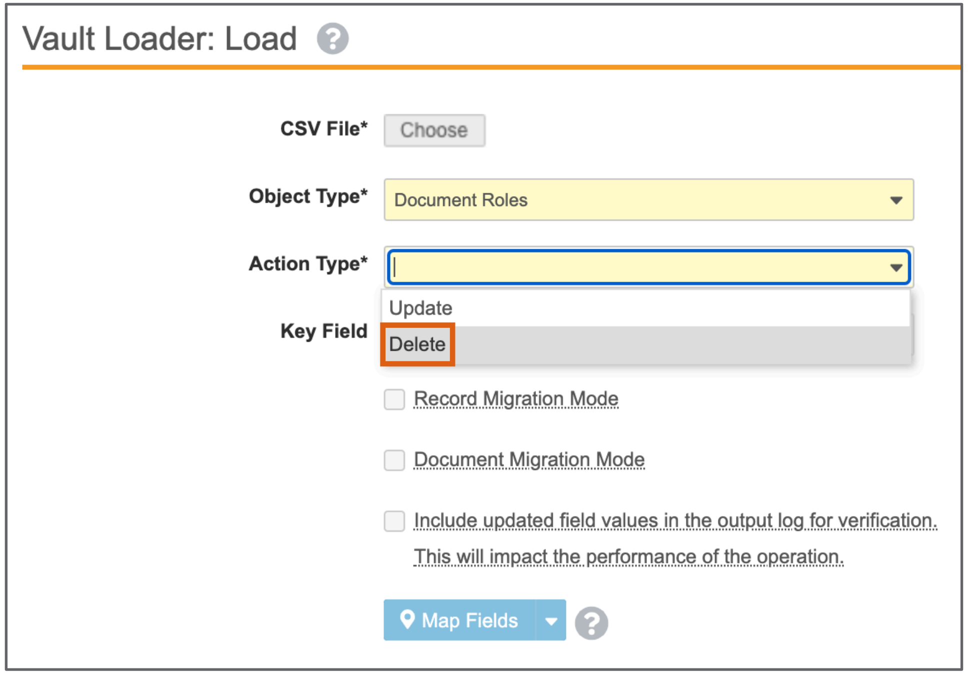
- Overview
  - This feature enables Vault Admins to:
    - Grant and revoke allowances to Sandboxes
    - View all Sandboxes in their Production tree, both direct and indirect clones, in one place
- Considerations
  - The Set Allowance action is available via UI and REST API
  - Limit: 4 level deep trees
  - 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





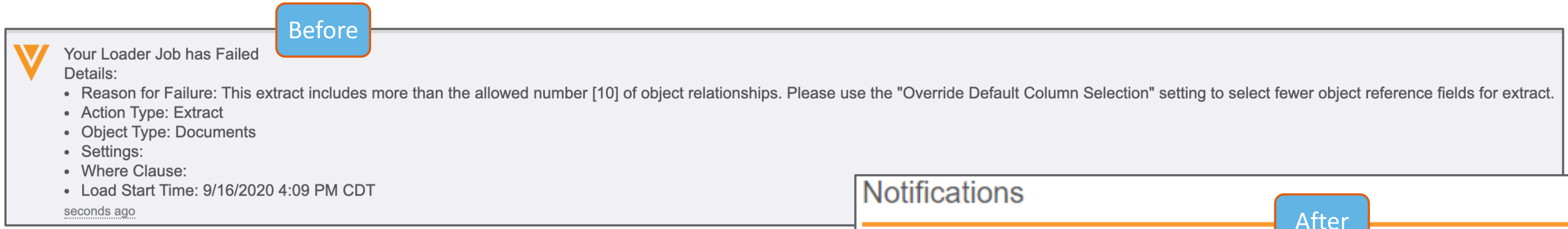
Vault Loader: Bulk Remove Users from Document Roles

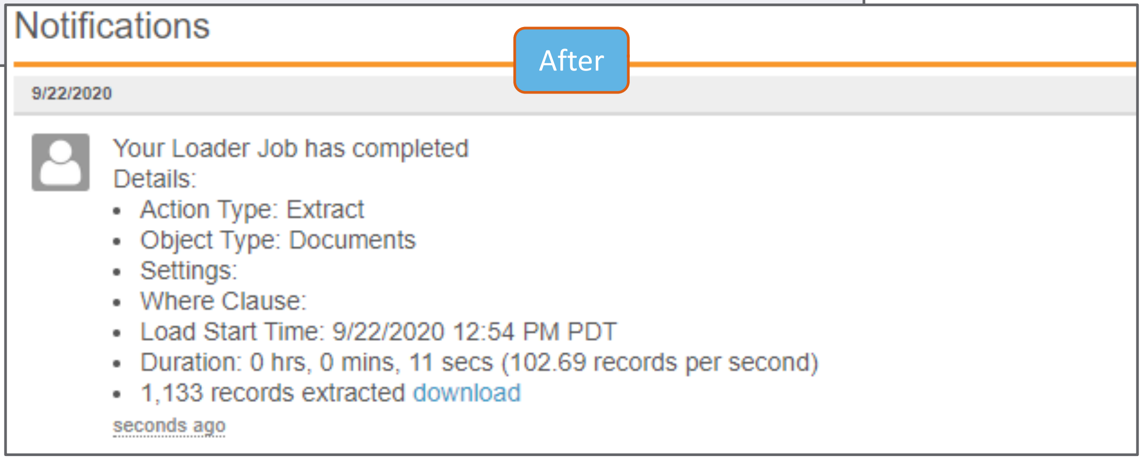
- Overview
  - Vault Loader will now support the bulk removal of users and groups from document roles
- Considerations
  - You need to know the user and group IDs
  - Loader ignores role names that are not available on specific documents



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

- Overview
  - 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



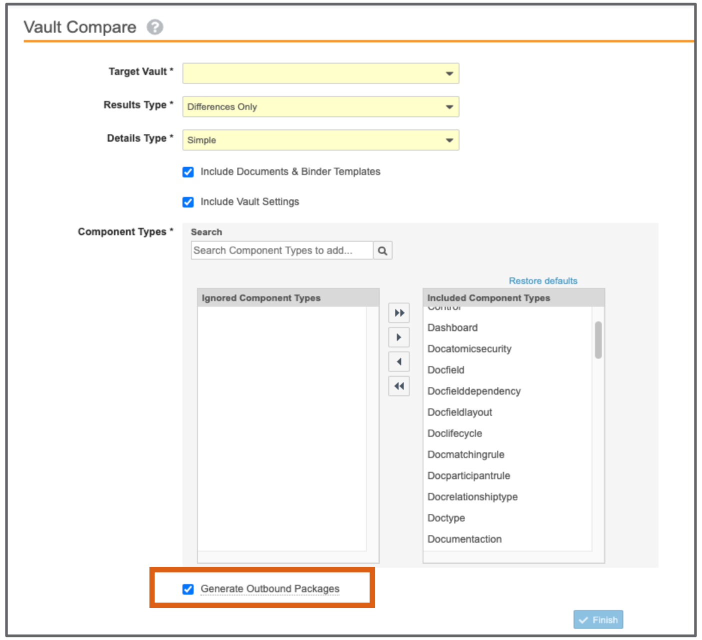


Vault Loader: Support Upsert with Object Types

- 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

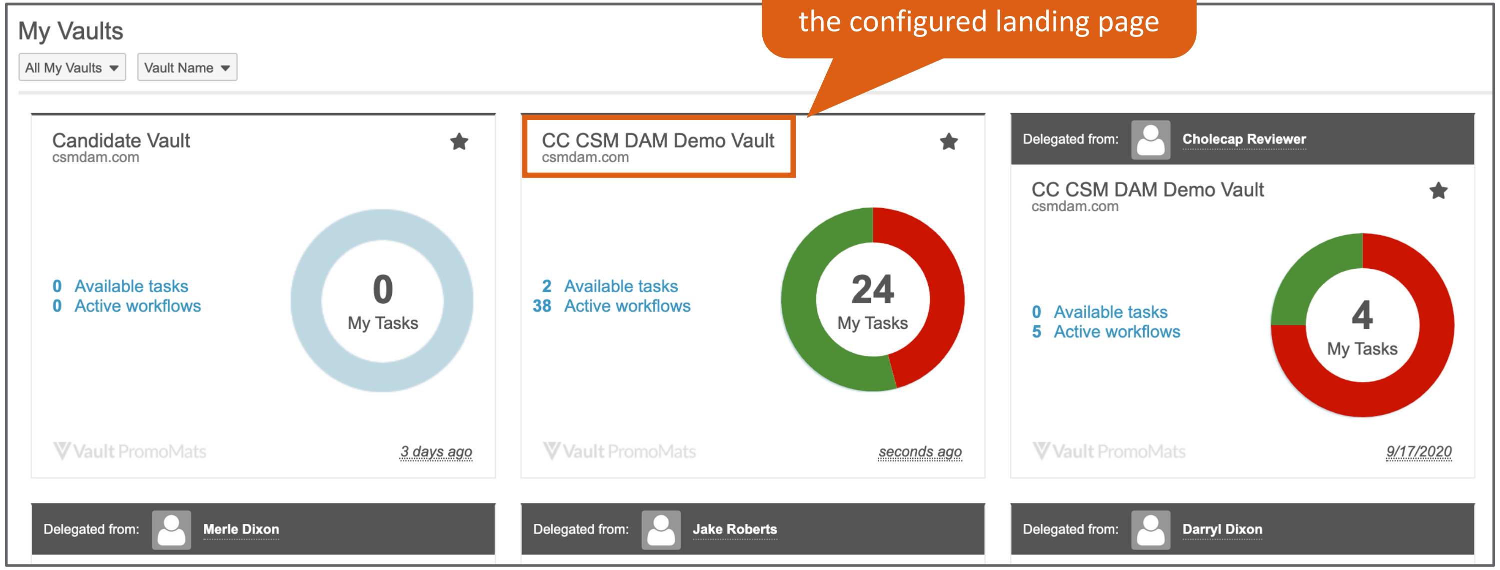
- Overview
  - This feature enhances the Vault Comparison report with an option to generate Outbound Packages based on the differences found in the Vault comparison, if components are missing or different, they will get added to the outbound packages
- Considerations
  - Each Outbound package can contain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



Configurable Landing Tabs

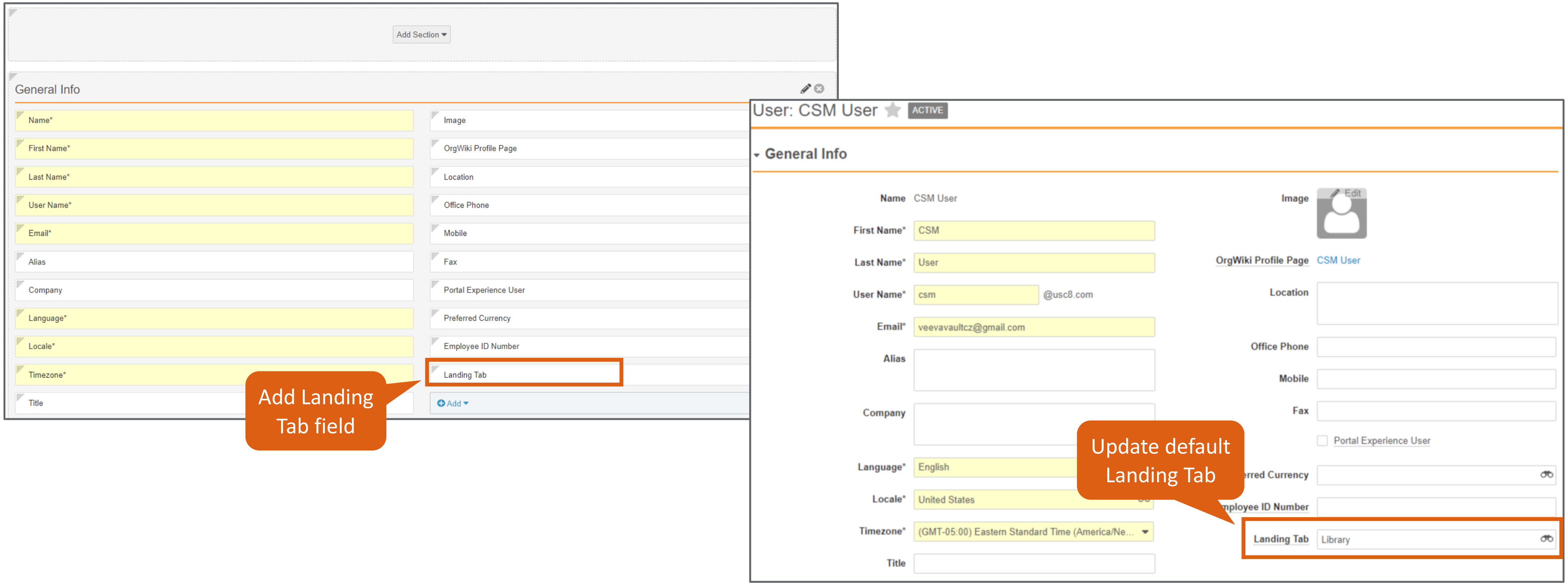
- Overview
  - This feature allows Admins to configure which tab a user navigates to when they log in to Vault
    - For example, users can be directed to the *Library* upon logging in, rather than the *Tasks (Home)* tab
- Considerations
  - This feature also adds the new *Landing Tab* field to the *User* Object to support configuration
  - If using My Vaults, click on the *Vault name* to be directed to the configured landing page

If using My Vaults, click on the Vault name to be directed to the configured landing page



Configurable Landing Tabs

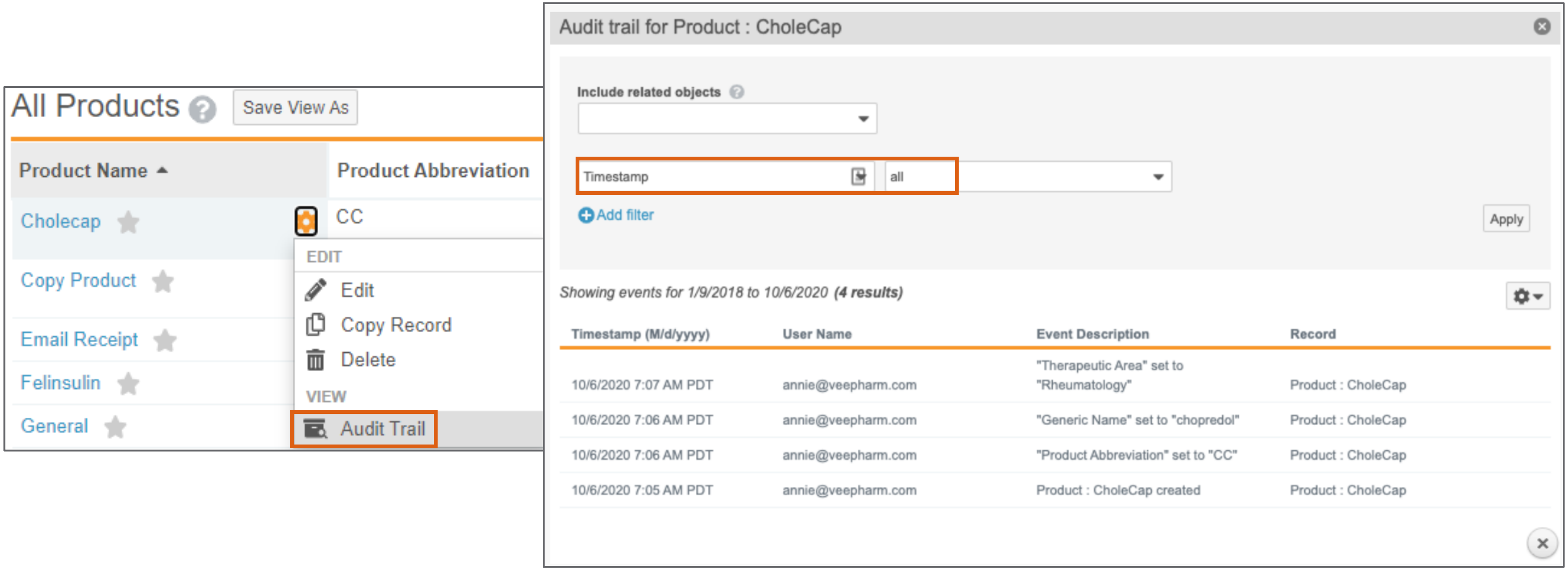
- Configuration
  - *To add Landing Tab field*: Admin > Configuration > Objects > User Object > Page Layout > {Layout} > Add Landing Tab field to layout section
  - *To update Landing Tab*: Admin > Users and Groups > Vault Users > (User) > Landing Tab



Objects

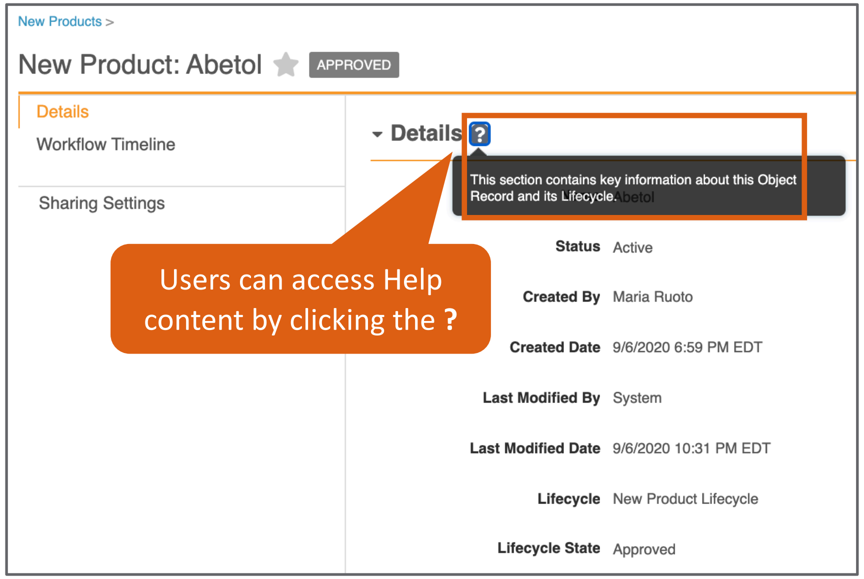
Filter by All Dates in Object Record Audit Trail

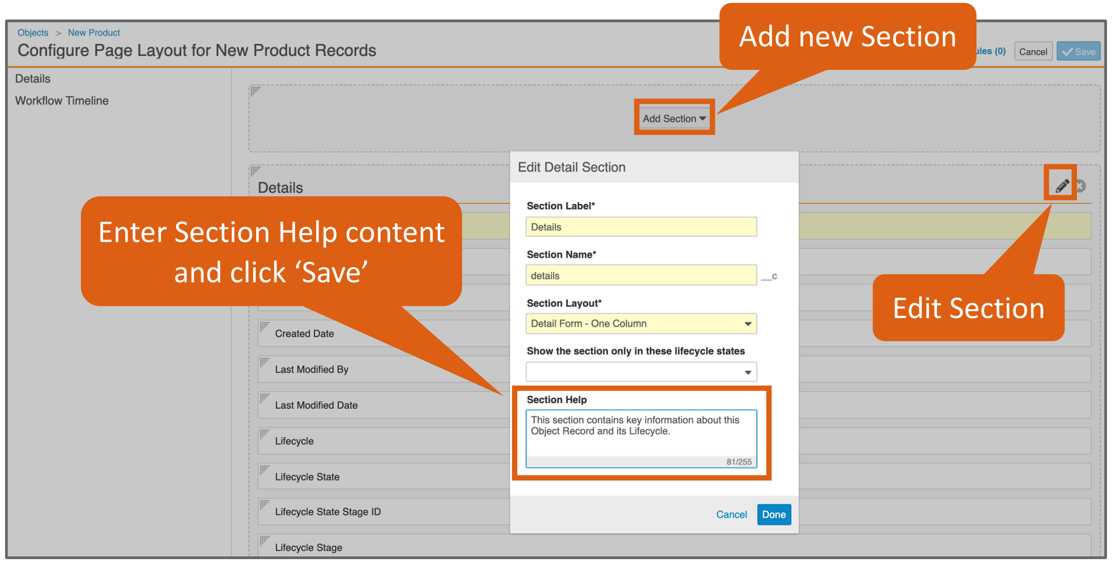
- Overview
  - This enhancement adds the *'all'* option back to the Timestamp filter in individual Object record audit trails, allowing user to more easily view and export complete audit trails



Section Level Help

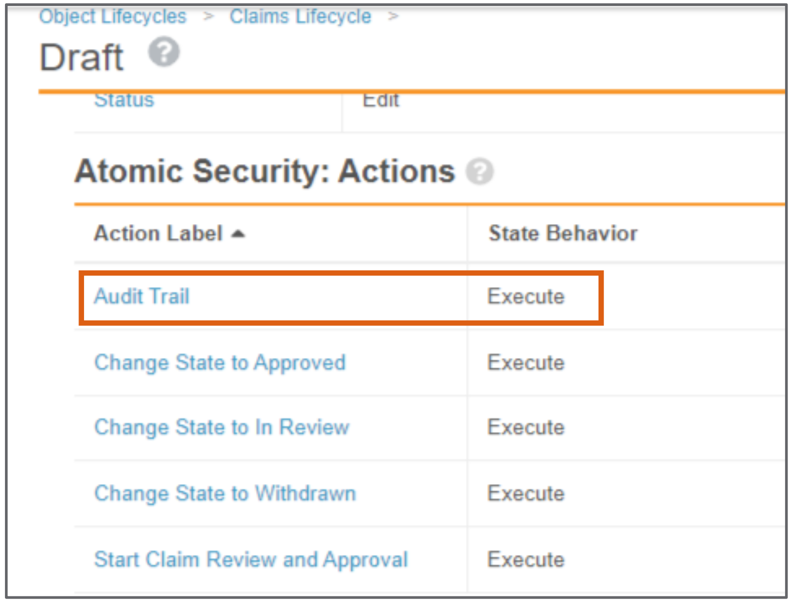
- Overview
  - Admins can now define help content for Object Record Detail Page Sections
- Considerations
  - When users view the Object Record Page, they can see this information by clicking the **?** icon on the section heading
- Configuration
  - Admin > Objects > [Object] > Page Layouts > New Product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





Audit Action Security for Objects

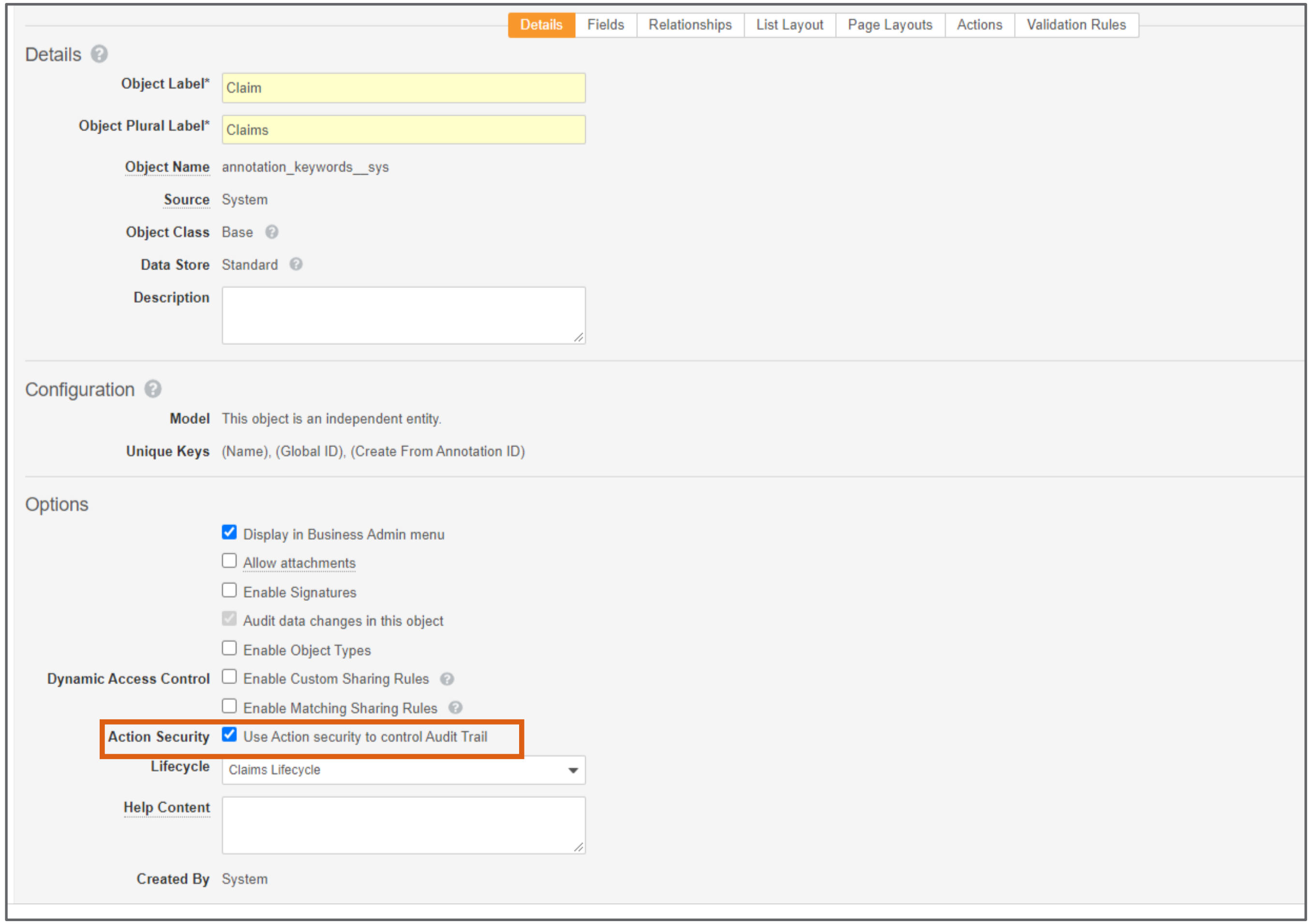
- Overview
  - This feature allows admins to control access to the Object audit trail by Object, state, and role via the Object Lifecycle Atomic Security actions
    - Previously the object record audit trails were either all visible or all hidden based on the application permission shared with documents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



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

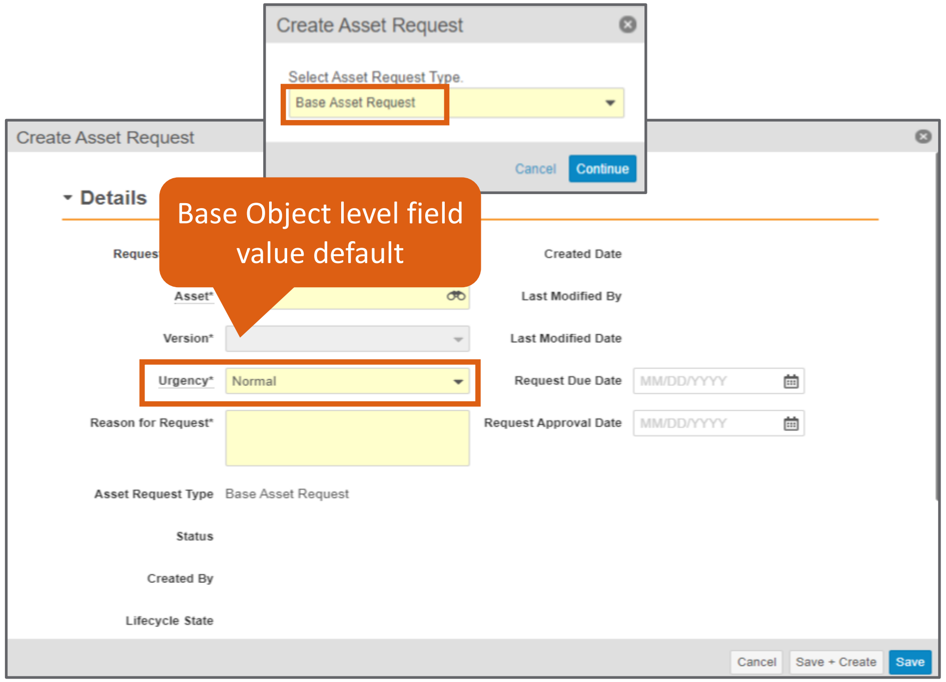
Audit Action Security for Objects

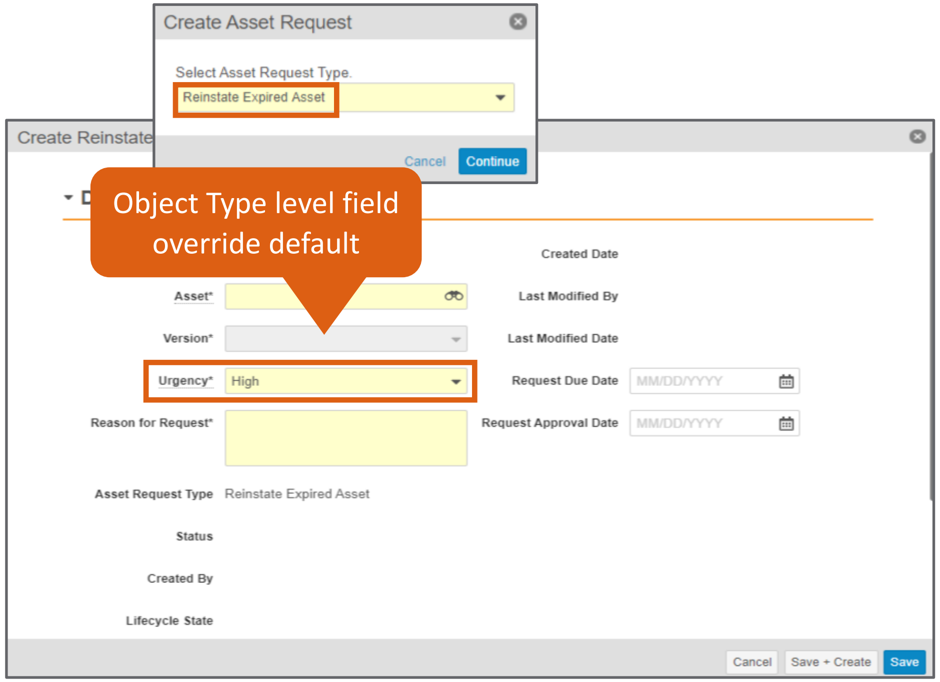
- Configuration
  - Admin > Configuration > Objects > {Object} > Details Tab > Edit Object > Options > Action Security



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

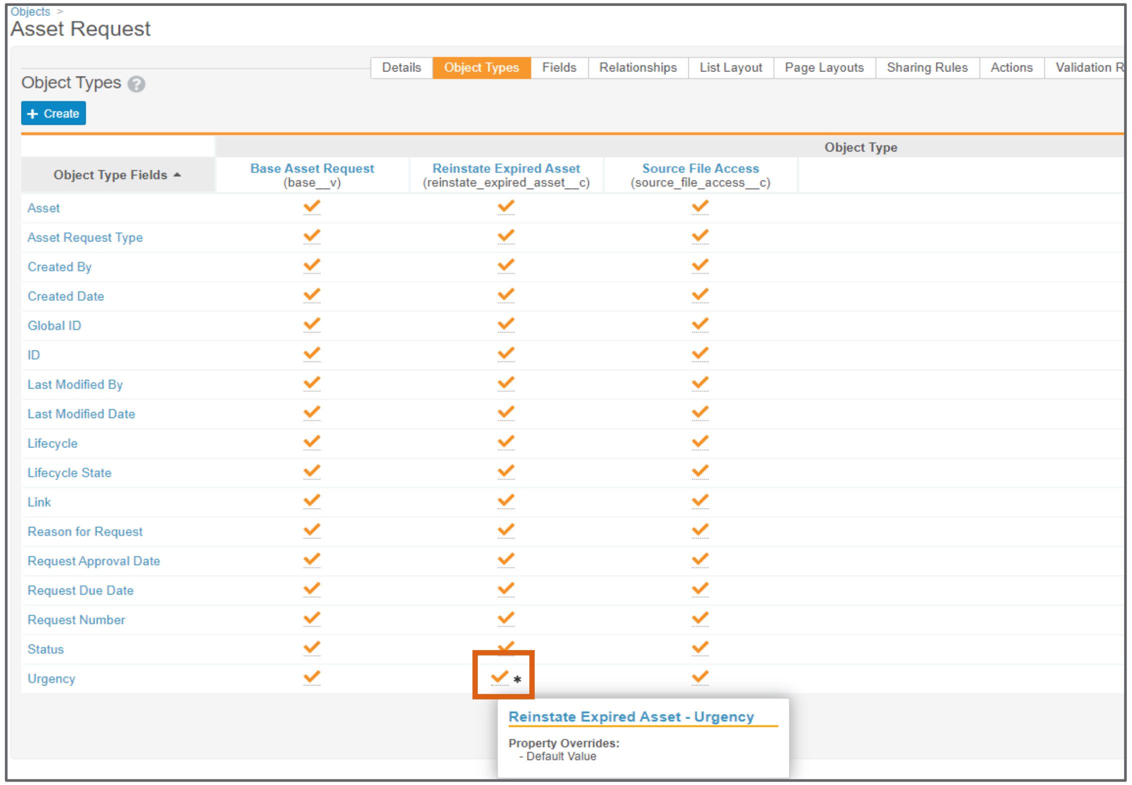


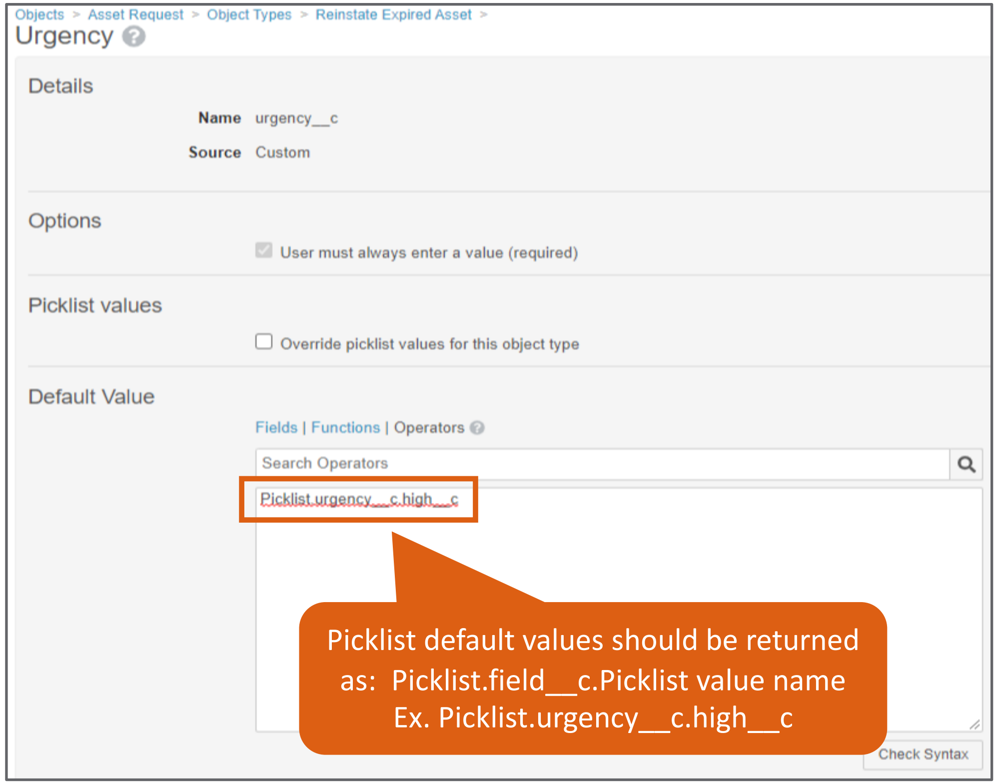


- Considerations
  - Default overrides can be defined for all field types where default values are allowed

Default by Object Type

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





Resources

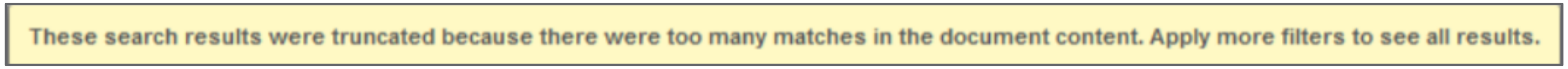
Resources

- 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
- Vault Help: http://vaulthelp2.vod309.com/wordpress/

Appendix

Truncated Search Result Warning

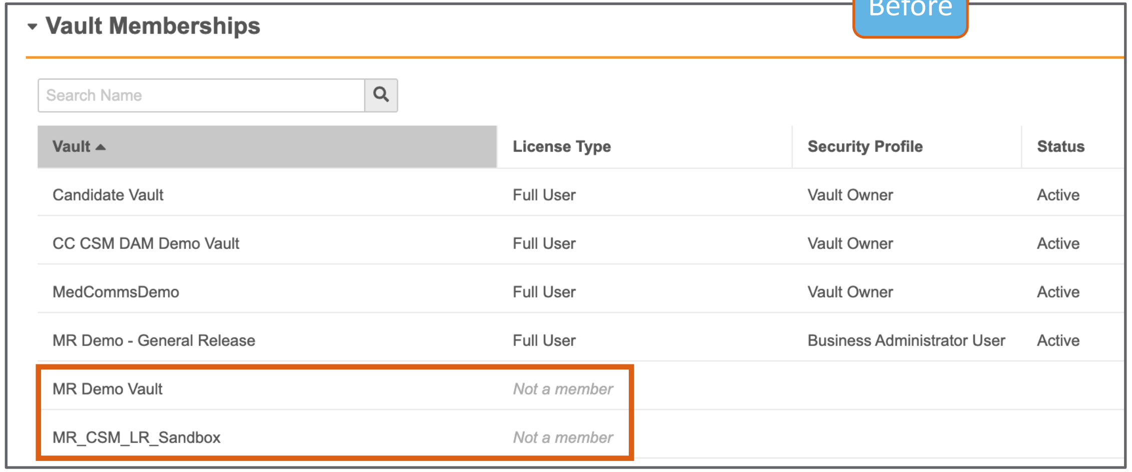
- Overview
  - This enhancement provides users with a UI banner notification when they perform a full-text search that hits the 5,000 results limit of relevant matches
  - The banner will inform the user that some of the results have been omitted
  - The user can see a complete set of results by applying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



Domain User UI Enhancement

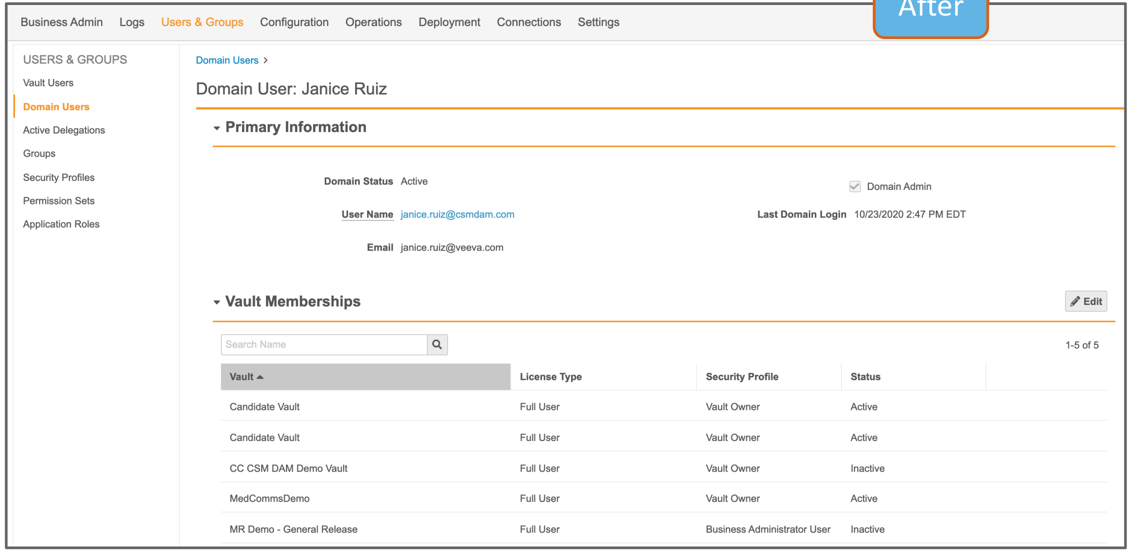
- Overview
  - With this release, the Vault Memberships section on the Domain User record detail page lists only Vaults for which a domain user has an active or inactive Vault membership

Before



Vault ▲	License Type	Security Profile	Status
Candidate Vault	Full User	Vault Owner	Active
CC CSM DAM Demo Vault	Full User	Vault Owner	Active
MedCommsDemo	Full User	Vault Owner	Active
MR Demo - General Release	Full User	Business Administrator User	Active
MR Demo Vault	*Not a member*		
MR_CSM_LR_Sandbox	*Not a member*		

After



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

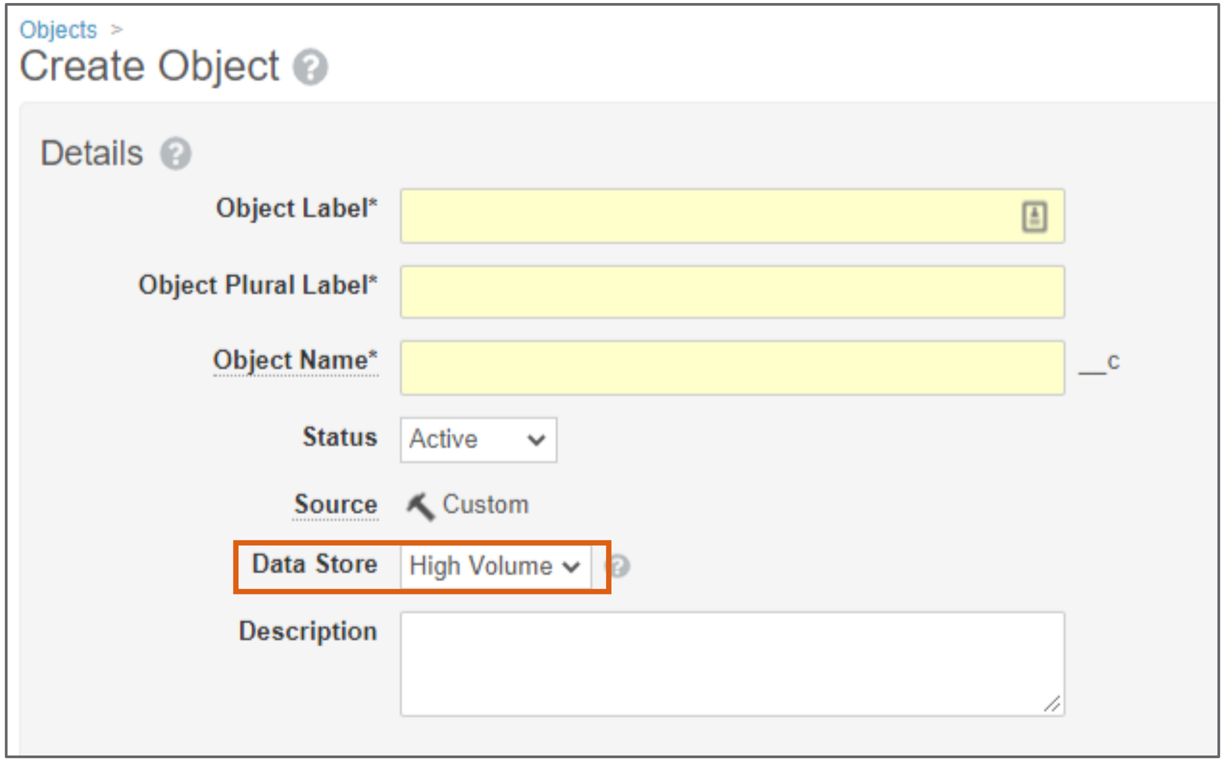
- Overview
  - Organizations can now control when the Vault File Manager automatically updates to the latest version by adding keys to the user's registry to indicate the highest version that the VFM client can update to
- Considerations
  - Setting up this option could prevent users from receiving critical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



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
  - Intergrations 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

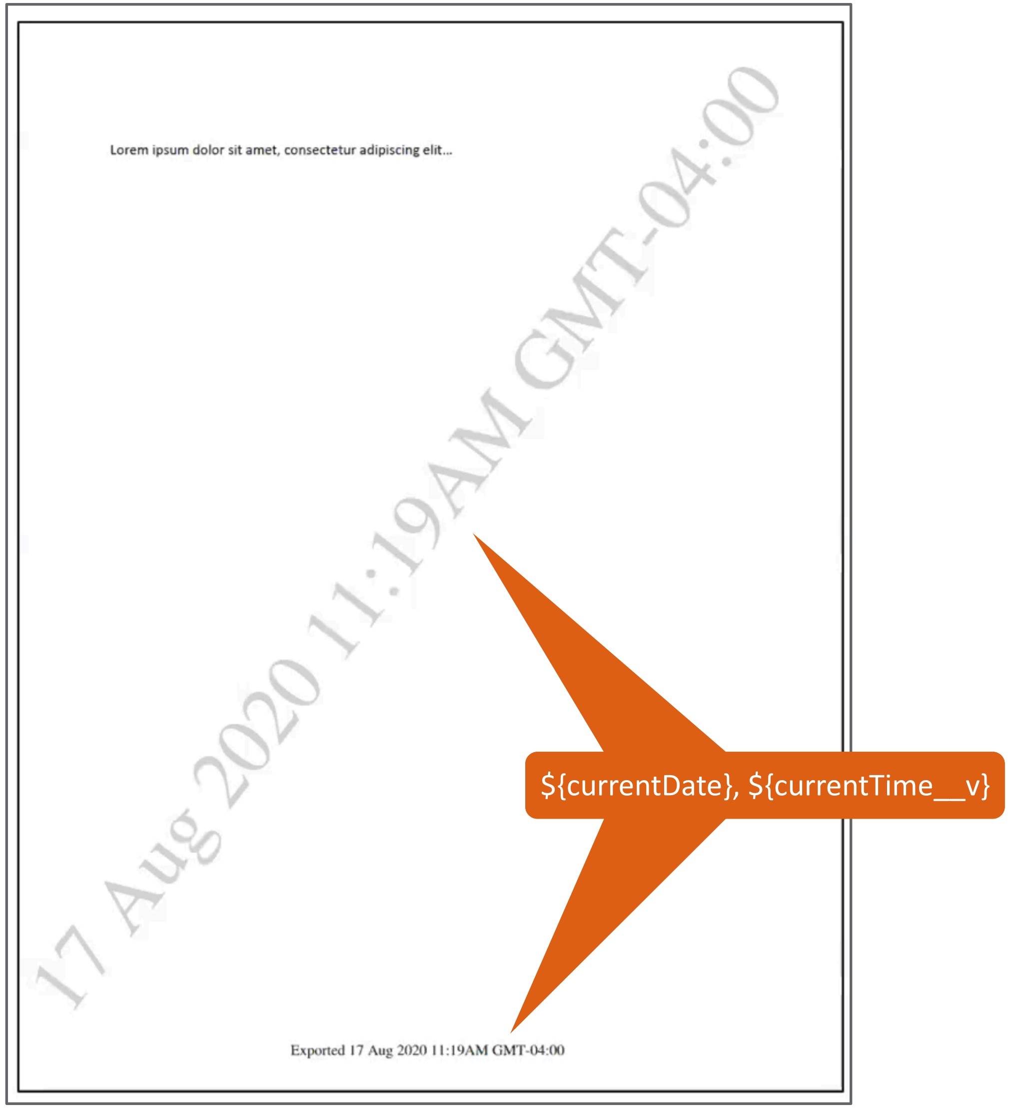
- Added the following values to the Language (language__v) picklist:
  - Chechen
  - Chuvash
  - Corsican
  - Herero
  - Kalaallisut-Greenlandic
  - Kirghiz-Kyrgyz
  - Mandarin
  - Romansh
  - Samoan
  - Turkmen
- Updated the Link (link__sys) field on Checklist related objects to enforce uniqueness and 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

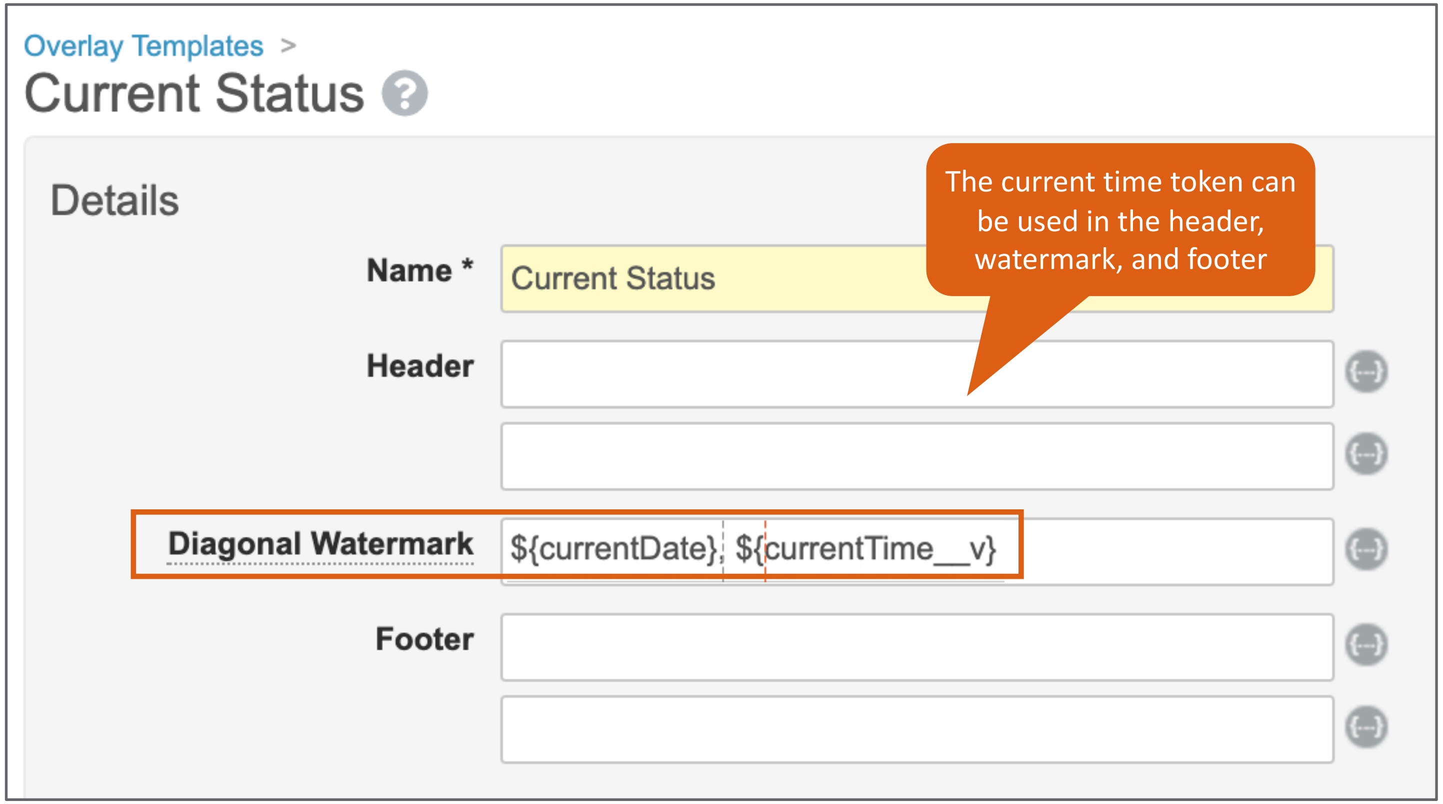
Show Current Time in Overlays

- 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

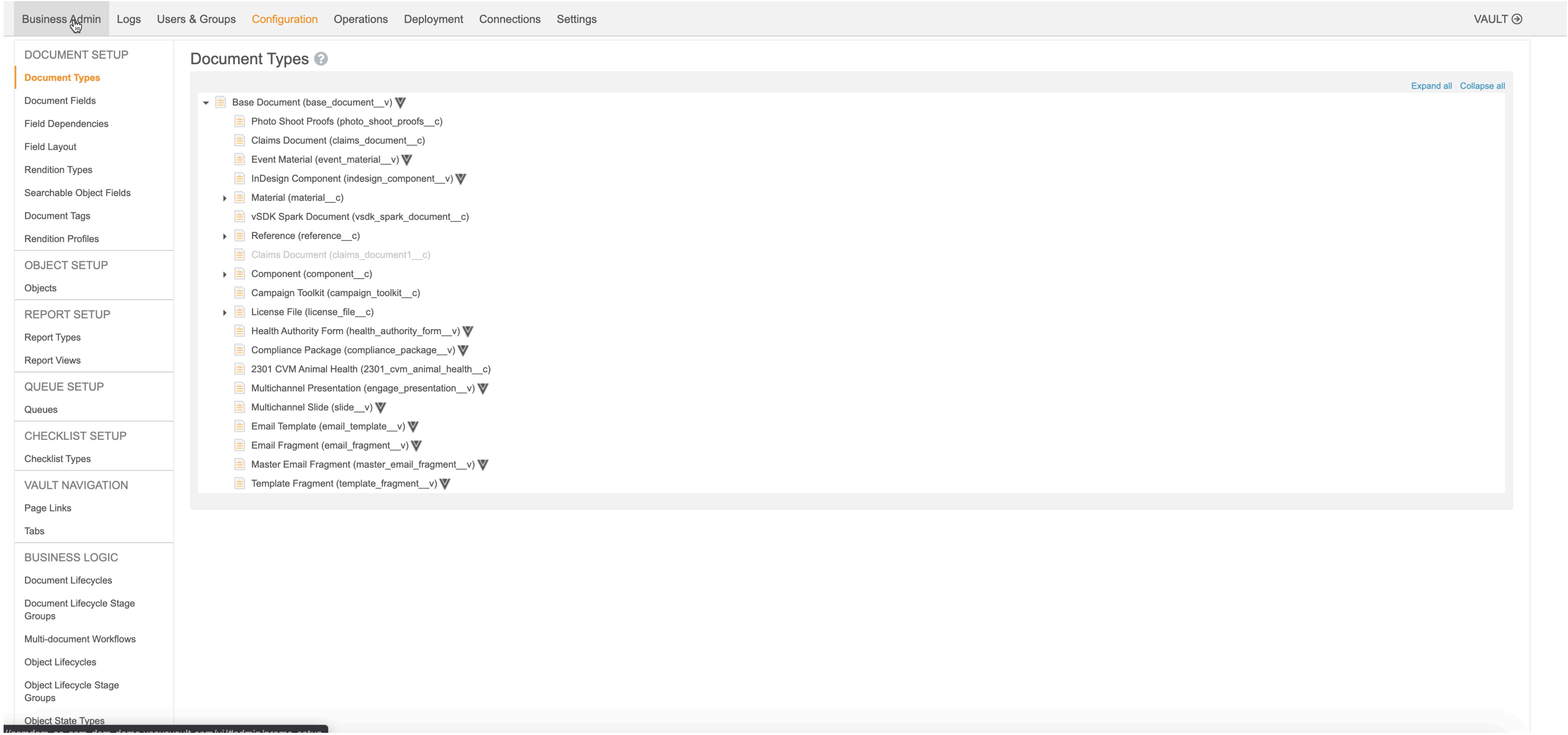


Show Current Time in Overlays

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

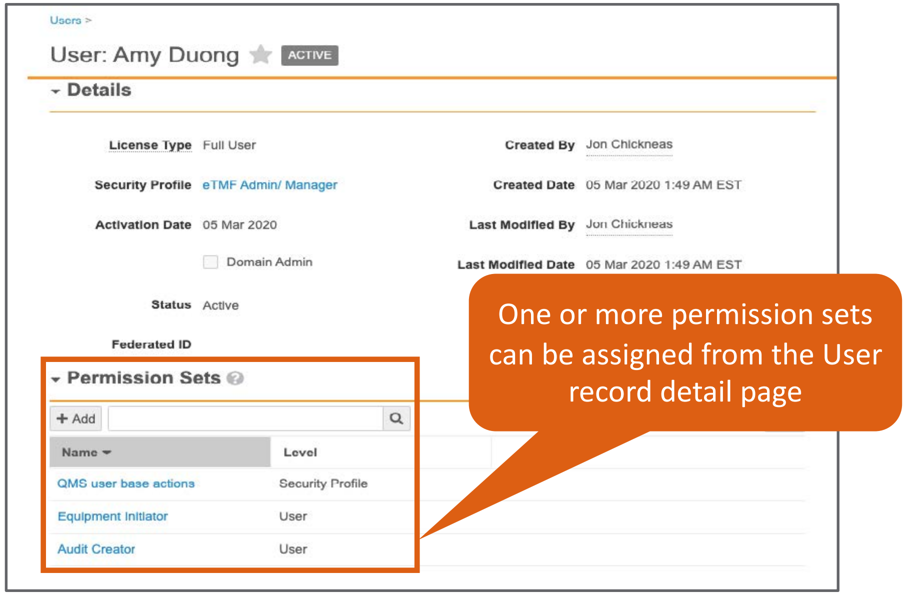


Show Current Time in Overlays



User Permission Sets

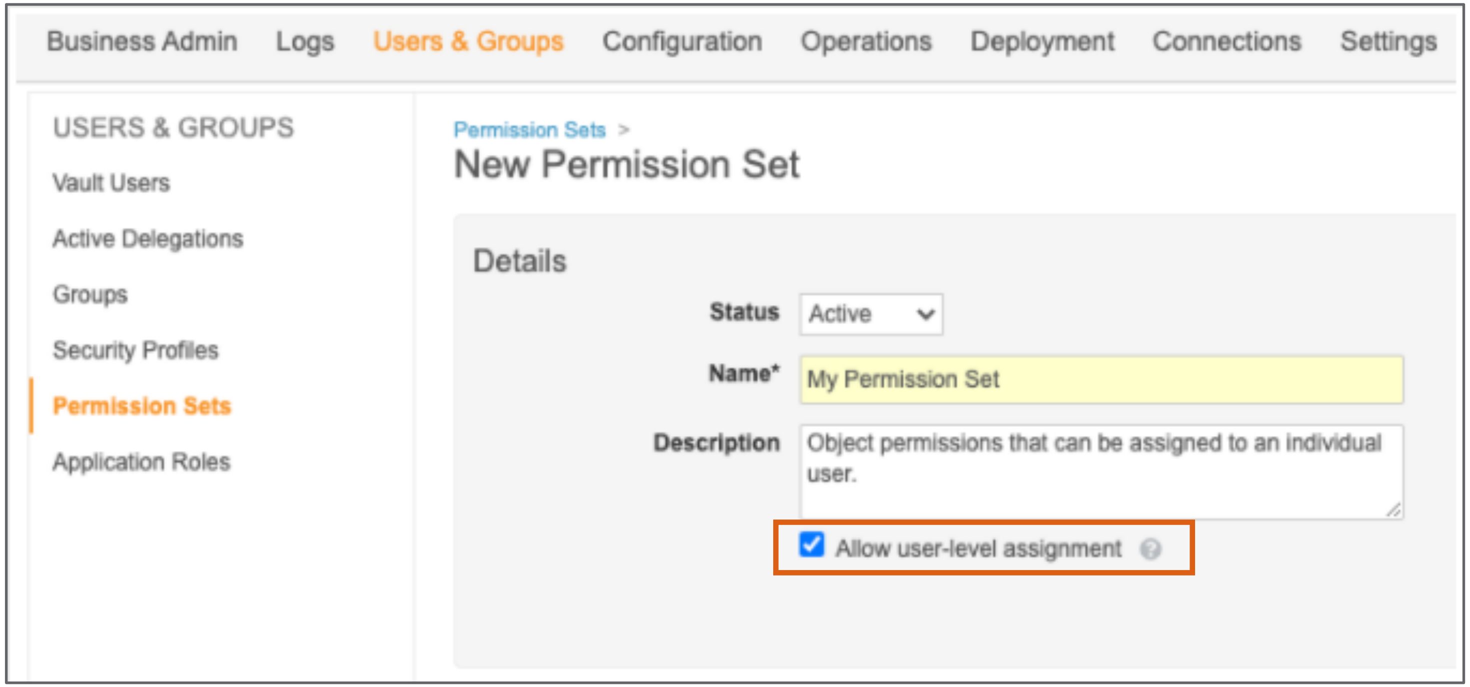
- Overview
  - When the *Allow User-level Assignment* feature is enabled the User detail page displays a new Permission Sets section allowing the Admin to assign permission sets at the individual user level



- 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



Thank you