

# 22R3 PromoMats Release Education

December 2022



# 22R3 Key Dates

Dates	Event
October 31	(all PODs) Pre-release vaults available
October 31 – November 4	Validation package available on VeevaDocs <b>October 31:</b> System Release Memo <b>November 1:</b> Compliance Documents <b>November 4:</b> Executed OQs
November 15	<b>PromoMats Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/5216651676921/WN_EVM-duQITDWx-KI7zwLiXA">https://veeva.zoom.us/webinar/register/5216651676921/WN_EVM-duQITDWx-KI7zwLiXA</a>
November 16	<b>Technical Release Education</b> <a href="https://veeva.zoom.us/webinar/register/9316651680576/WN_p6CvmsKqQPqo6NZQuVA26A">https://veeva.zoom.us/webinar/register/9316651680576/WN_p6CvmsKqQPqo6NZQuVA26A</a>
November 18	Release to all limited release PODs and PODs PODs VV1-12, VV1-1069, VV1-1144 <i>Vault File Manager does not release at this time, and instead releases with the general release PODs</i>
December 2	Release to all general release PODs





# Announcements

Veeva  
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SUMMIT**

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28-30 November 2022  
Madrid

FOUR ZONES

CRM Suite

Vault PromoMats & Vault Medical

Link

OpenData

DEDICATED MEDICAL SESSIONS

**Monday 28 November**

**18:00 - 20:30**

Welcome Reception

**Tuesday 29 November**

**09:30 - 18:00**

Opening Keynote, Zone Keynotes, Sessions,  
Connects, Roadmaps, and Innovation Theaters

**19:00**

Evening Event

**Wednesday 30 November**

**9:00 - 15:00**

Forums, Sessions, Roadmap Repeats, Connects

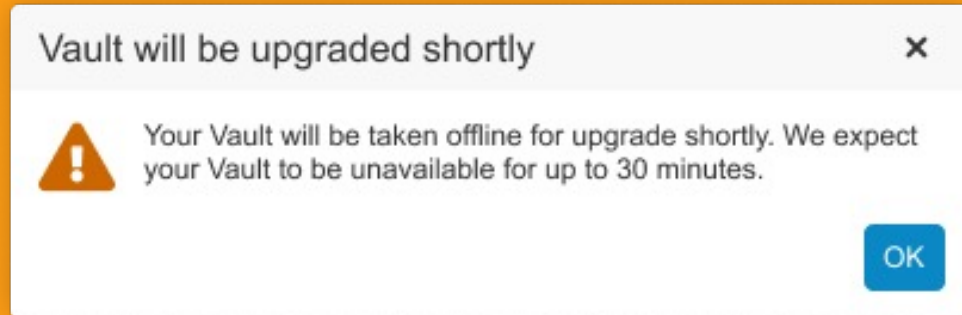


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# 30-Minute Upgrade



## Overview

- Production Vaults will be unavailable for approximately 30-minutes or less while being upgraded during a release
- Within 2 to 30 minutes prior to the Vault being unavailable, active users will be notified and have time to complete their work

## Business Justification

- Shorter downtime reduces burden on users who need access to Vault
- Notification prepares users for the downtime

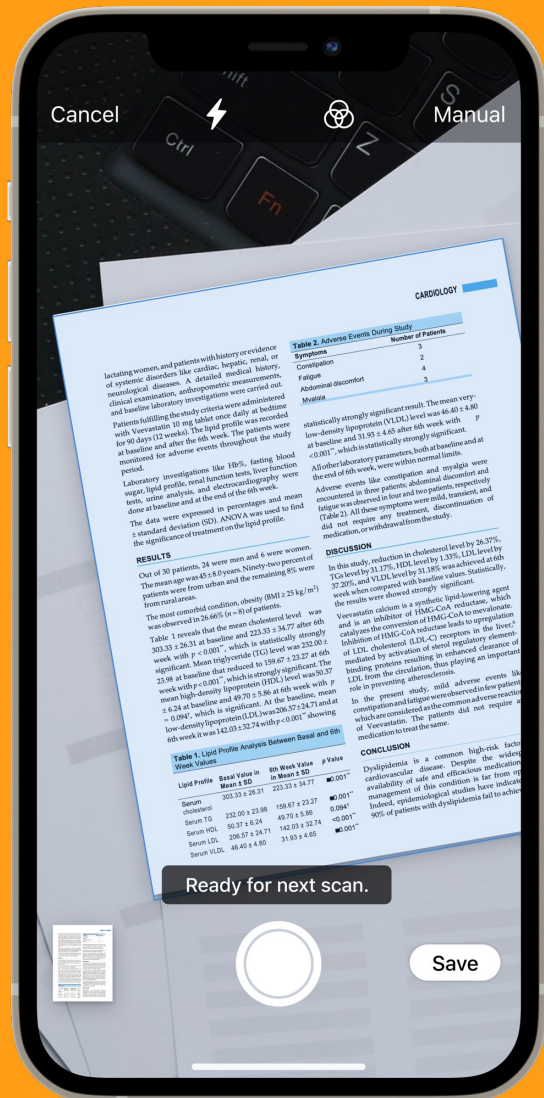




# 30-Minute Upgrade

- Details
  - Once a Vault has been upgraded, users will see a “What’s New” notification in the notifications area
  - An email will be sent to users subscribed to Service Availability Notifications
  - Sandbox Vaults will continue to be unavailable for the duration of the 4 to 6 hour maintenance window
  - Production Vault release downtime will be reduced to 10 minutes by 2023
- Considerations
  - If user has other Vaults available, they will be taken to vault they accessed most recently once they login and the Vault switcher shows unavailable vaults as disabled

# Capture and Create New Documents



## Overview

- Users can now use their phone camera to scan and create new unclassified documents via the Vault Mobile app

## Business Justification

- Users may have paper documents that need to be scanned and uploaded into Vault
- This feature replaces the existing Veeva Snap mobile app functionality

**CARDIOLOGY**

lactating women, and patients with history or evidence of systemic disorders like cardiac, hepatic, renal, or neurological diseases. A detailed medical history, physical examination, anthropometric measurements, clinical examination, and laboratory investigations were carried out. Patients fulfilling the study criteria were administered with Veevatin 10 mg tablet once daily at bedtime for 90 days (12 weeks). The lipid profile was recorded at baseline and after the 6th week. The patients were monitored for adverse events throughout the study period.

Laboratory investigations like HDL<sub>c</sub>, fasting blood sugar, lipid profile, renal function tests, liver function tests, uric acid, and electrocardiography were done at baseline and at the end of the 6th week. The data were expressed in percentage and mean  $\pm$  standard deviation (SD). ANOVA was used to find the significance of treatment on the lipid profile.

**RESULTS**

Out of 30 patients, 24 were men and 6 were women. The mean age was 45  $\pm$  8.0 years. Ninety-two percent of patients were from urban and the remaining 8% were from rural areas.

The most comorbid condition, obesity (BMI  $\geq$  25 kg/m<sup>2</sup>) was observed in 24.6% (n = 8) of patients.

Table 1 reveals that the mean cholesterol level was 202.33  $\pm$  28.31 at baseline and 223.23  $\pm$  34.77 after 6th week with p < 0.001, which is statistically strongly significant. Mean triglyceride (TG) level was 232.00  $\pm$  25.98 at baseline that reduced to 159.67  $\pm$  23.27 at 6th week with p < 0.001, which is statistically strongly significant. The mean high-density lipoprotein (HDL<sub>c</sub>) level was 50.37  $\pm$  6.24 at baseline and 49.70  $\pm$  5.86 at 6th week, mean  $\pm$  0.09%, which is not significant. At the baseline, mean low-density lipoprotein (LDL<sub>c</sub>) was 206.57  $\pm$  24.71 and at 6th week it was 142.03  $\pm$  32.74 with p < 0.001, showing

**Table 1. Lipid Profile Analysis Between Basal and 6th Week Values**

Lipid Profile	Basal Value in Mean $\pm$ SD	6th Week Value in Mean $\pm$ SD	p Value
Serum Cholesterol	202.33 $\pm$ 28.31	223.23 $\pm$ 34.77	<0.001*
Serum TG	232.00 $\pm$ 25.98	159.67 $\pm$ 23.27	<0.001*
Serum HDL <sub>c</sub>	50.37 $\pm$ 6.24	49.70 $\pm$ 5.86	0.094
Serum LDL <sub>c</sub>	206.57 $\pm$ 24.71	142.03 $\pm$ 32.74	<0.001*
Serum VLDL <sub>c</sub>	46.40 $\pm$ 4.80	31.03 $\pm$ 4.65	<0.001*

**Table 2. Adverse Events During Study**

Symptoms	Number of Patients
Constipation	3
Fatigue	2
Abdominal discomfort	4
Myalgia	3

statistically strongly significant result. The mean very-low-density lipoprotein (VLDL<sub>c</sub>) level was 46.40  $\pm$  4.80 at baseline and 31.03  $\pm$  4.65 after 6th week with p < 0.001, which is statistically strongly significant.

All other laboratory parameters, both at baseline and at the end of 6th week, were within normal limits.

Adverse events like constipation and myalgia were encountered in three patients, abdominal discomfort and fatigue was observed in four and two patients, respectively (Table 2). All these symptoms were mild, transient, and did not require any treatment, discontinuation of medication, or withdrawal from the study.

**DISCUSSION**

In this study, reduction in cholesterol level by 26.37%, HDL<sub>c</sub> level by 1.35%, LDL<sub>c</sub> level by 21.17%, TG level by 31.18% was achieved at 6th week when compared with baseline values. Statistically, the results were showed strongly significant.

Veevatin calcium is a synthetic lipid-lowering agent and is an inhibitor of HMG-CoA reductase, which catalyzes the conversion of HMG-CoA to mevalonate. Inhibition of HMG-CoA reductase leads to upregulation of LDL receptors in the liver, enhanced clearance of LDL cholesterol resulting in enhanced clearance of LDL from the circulation, thus playing an important role in preventing atherosclerosis.

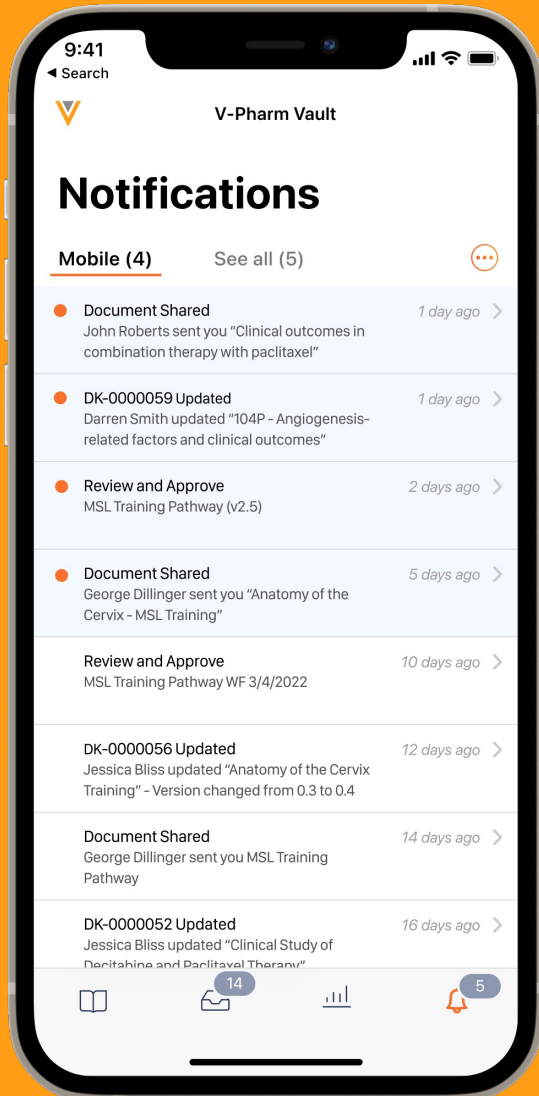
In the present study, mild adverse events like constipation and fatigue were observed in few patients which are considered as the common adverse reactions of Veevatin. The patients did not require a medication to treat the same.

**CONCLUSION**

Dyslipidemia is a common high-risk factor in cardiovascular diseases. Despite the wide availability of safe and efficacious medication management of this condition is far from optimal. Indeed, epidemiological studies have indicated 90% of patients with dyslipidemia fail to achieve



# View Notifications in Vault Mobile



## Overview

- Users can now view their notifications within the Vault Mobile app

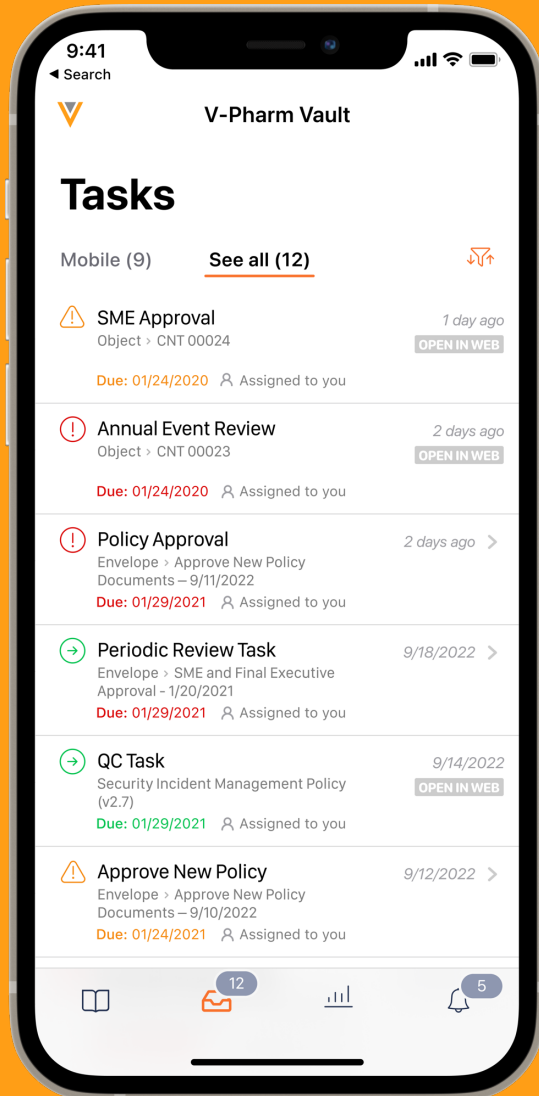
## Business Justification

- The new Notifications mobile tab makes it easy for users to access their notifications
- Users can switch between seeing all Vault notifications (mobile and Web notifications), and only mobile push notifications





# View All Task Types in Vault Mobile



## Overview

- The app now displays all tasks, not just OneWorkflow document tasks

## Business Justification

- Previously, only OneWorkflow document tasks were displayed since those are the only tasks which can be completed in the mobile app
- To alleviate any confusion, Vault Mobile now displays all tasks in the app, and separates the tasks that can be completed within the app from the tasks which will require a browser



## Overview

- Vault MedComms has been renamed to **Vault Medical** in 22R3
- Vault Medical will comprise 2 applications: **MedComms** and **MedInquiry**
- The two applications can be used independently of one another, or together
- Users can be licensed for one or both applications

## Business Justification

- Both applications will now have a dedicated operating model and roadmap



# Document Content Reindex

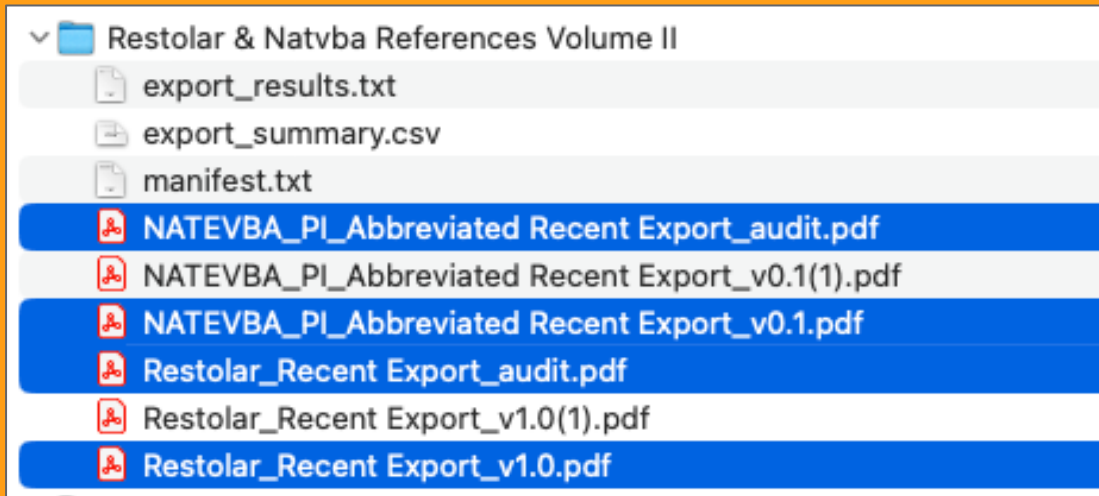
- In preparation of upgrades to the Vault search engine, the content of all documents is being reindexed. Vault will add English stemming to document content search so that plural nouns, verb tense, and comparatives are automatically substituted
  - Reindexing for General Release PODs will begin on Dec 2<sup>nd</sup> and is expected to be completed by Feb 17<sup>th</sup>
  - Reindexing for Limited Release PODs began on Aug 18<sup>th</sup> and will be completed by early Nov
  - Both Sandbox and Production Vaults will get reindexed
  - Changes will not be immediately noticeable
  - Will result in more accurate search results due to the new OCR threshold
- Considerations
  - Older documents that have not been reindexed for a long time and need to go through the OCR process may have a different set of searchable terms based on the new OCR process
    - There maybe more or fewer searchable terms in those documents based on the old OCR confidence thresholds vs the new



Documents



# Exported Binders: Audit Trail File Naming



## Overview

- Adjustment of binder audit trail file naming based to reference latest export version

## Business Justification

- Previously, the audit trail file name for binders was based on the earliest export version.
- For consistency, moving forward the audit trail file name will always reference the latest export version



# Freeze Headers & Columns in Document Grid Layout



Recent Library ?

Freeze n columns (left of blue line)

Name	Product Family	Status	Type	Subtype	Created By	
★  Test Collab Authoring Document (v0.1)		Open	Regulatory	Correspondence	Alexandra Walsh (veeva.com)	
★  Restolar PI - Variation increase shelf life (v0.1)	Restolar	Draft	Labeling	Labeling - US	Alexandra Walsh (veeva.com)	
★  Restolar FDA Correspondence 13Sept2022 (v0.1)	Restolar	Open	Regulatory	Correspondence	System	
★  Restolar PI (v1.0)	Restolar	Current In-Use	Labeling	Labeling - US	Alexandra Walsh (veeva.com)	2002 2:15
★  Labrinone CCDS (v2.0)	Labrinone	Approved	Labeling	Core Datasheet	Bram Seigers	1.5
★  Restolar PI Variation AW (v1.0)	Restolar	Approved	Labeling	Labeling - US	Alexandra Walsh (veeva.com)	20 Aug 2022 2:15
★  SmPC - English (v1.0)		Approved	Authoring Templates	Labeling Templates	Bram Seigers	22 Dec 2021 4:15
★  Master Enalapril SmPC (EN) (v5.0)	Enalapril	Current In-Use	Labeling	Labeling - EU	Bram Seigers	22 Dec 2021 6:15

1-20 of 20

PERFORM BULK ACTION

- First 1000 Documents
- Current Page (25 documents)
- MANAGE
  - Start Workflow
- EXPORT
  - CSV
  - Excel
- VIEW
  - Edit Columns
  - Truncate Cell Text
  - Freeze Column

Menu to freeze columns

Horizontal scroll always visible

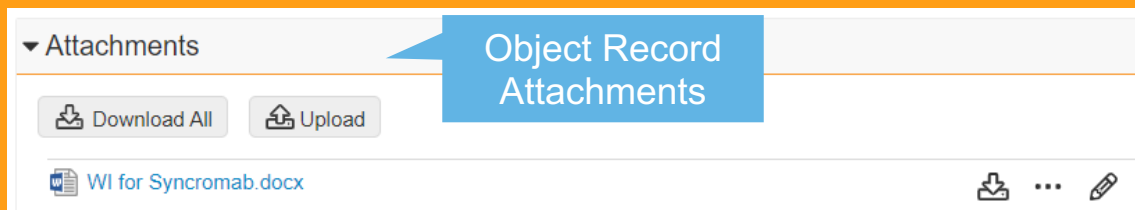
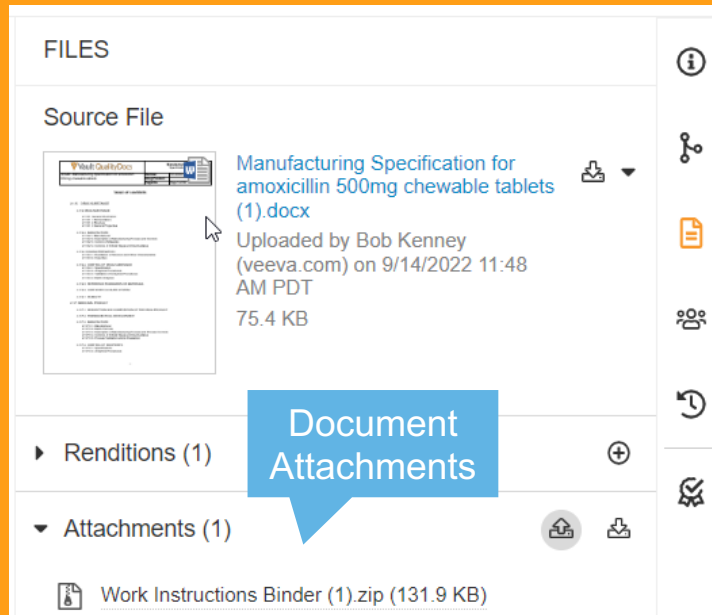
## Overview

- Within the Library grid view, column headers are now frozen so that column names are always visible
- Users can freeze columns to make horizontal scrolling easier
- The horizontal scroll bar is automatically available without having to navigate to the bottom of your results first

## Business Justification

- Makes navigation of documents in the Library grid view much easier

# Suppressing Attachment Renditions on Single/Bulk Document/Object Records



## Overview

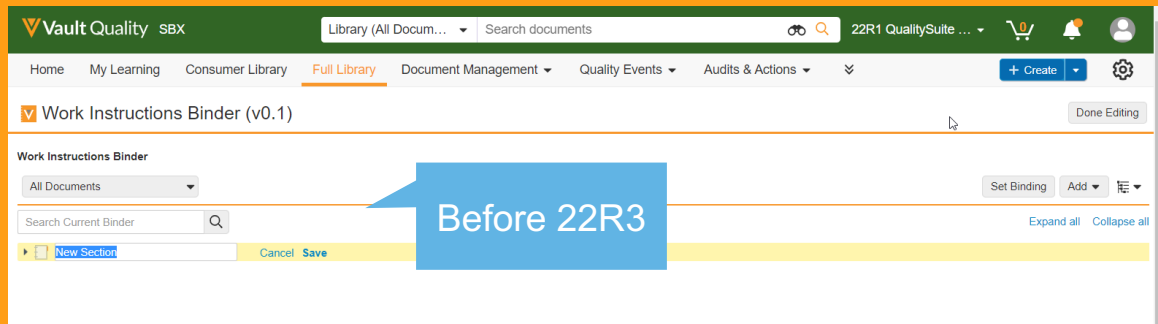
- Vault suppresses rendering the viewable rendition of attachments uploaded to documents and object records via code using the Vault API and Vault Java SDK
- Renditions created in this manner will be created on-demand, the first time a user navigates to the Attachments section of a document/object record and views an attachment

## Business Justification

- Reduce the impact on the rendition server when large numbers of attachments are created in bulk, thereby improving user experience viewing documents and attachments



# Adding Section to Binder in Outline View Confirmation Dialog

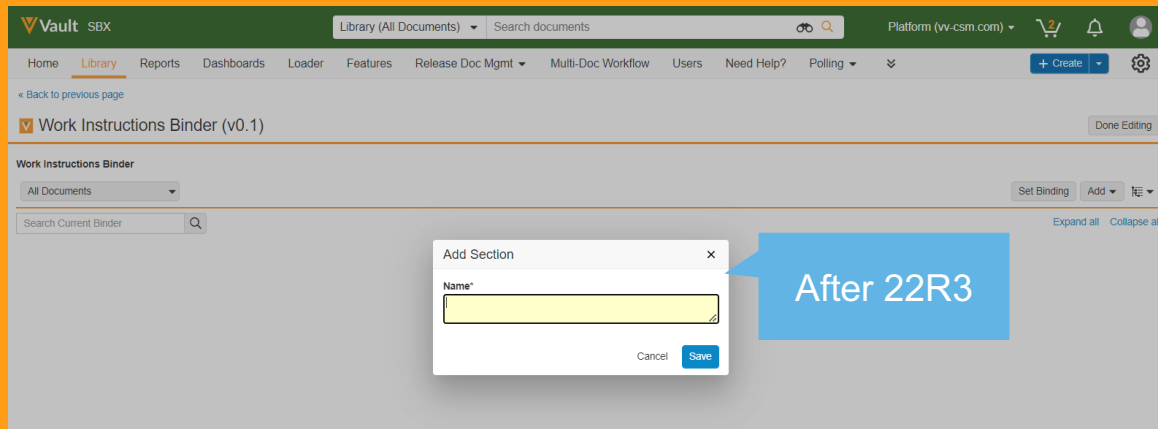


## Overview

- When adding a section to a binder in Outline View, users now interact with a dialog to name and save the new section

## Business Justification

- Creates consistency throughout the Vault user interface







# OCR Extended Language Support

- Overview
  - Vault is extending Optical Character Recognition (OCR) support to include files containing non-English text. This feature allows users to override the initial OCR language selection.
    - Supported Languages include: Chinese (Simplified), Chinese (Tradition), Dutch, French, German, Hungarian, Italian, Korean, Japanese, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Thai, and Turkish
  - Previously, OCR (Optical Character Recognition) extracted and indexed text only in English. OCR now recognizes text in all languages that are supported in Vault
- Considerations
  - Significantly enhances Global end-users experience by providing OCR in local languages
- Learn more about [OCR Extended Language Support](#)





# Document Related Configuration Setting Audit Trail

- With this enhancement, the following configuration settings for documents will have audit events that will display in the System Audit History:
  - Maximum characters for exported file name (including extension)
  - Maximum characters for exported folder name
  - Maximum characters for exported document path
- Previously the system was not tracking changes to these configuration settings, which was confusing for Admin users because other events were being tracked and recorded in the System Audit History
- Considerations & Limitations
  - None

- Learn more about [Viewing Admin Logs](#)





Objects

# Outbound Email Address for Persons



Objects > Person > Fields >  
Outbound Email Status

Details ?

**Label** Outbound Email Status

**Status** Active

**Source** System

**Name** outbound\_email\_status\_\_sys

**Data Type** Picklist

**Help Content** Indicates the status of an outbound email address in the Email field if an Outbound Email Domain was created. An outbound email address needs to be successfully verified to be Active.

Options

- User must always enter a value (required)
- Values must be unique
- Display in default lists and hovercards
- Do not copy this field in Copy Record
- Allow user to select multiple values

Picklist values [Fields using this picklist: 154](#)

Picklist Value Label	Picklist Value Name
Active	active__v
Inactive	inactive__v

New field on the Person object

## Overview

- This feature will give apps the ability to allow their users to email from their own custom defined email addresses

## Business Justification

- Allows customers to verify and define root domains and subdomains for distributing email from Vault
- Allows customers to distribute emails from many individual users



# Outbound Email Address for Persons



- Details

- Apps will be able to choose from either allowing their customers to define outbound email addresses directly on the base person record, or on a new person type
- Admin can set the outbound email address in the Email field for the Person record
- A system-managed field “Outbound Email Status” will be added to the base Person object
- When the Email field has a domain that matches an Active and Verified Outbound Email Domain and the Outbound Email Status is not Active, a new user action “Verify Outbound Email” will be available
- The email shall contain a link that must be clicked in order to activate Outbound Email Status

- Considerations

- If the email address is changed, the Outbound Email Status will again become Inactive, and it must be verified again
- This only applies to Vault Applications with Outbound Email Domains enabled (support enabled flag)

- Learn more about [Outbound Email Address](#)



# Lookup Fields for High Volume Objects



Objects > Country Language > Fields >  
Create Field ?

**Step 1: Select the field type**

Use a Lookup field to get values by looking up through existing object relationship.

Lookup field is read-only. It displays values from related record and has the same type as Source field of related record. [Learn more](#)

- Text
- Number
- Date
- DateTime
- Yes/No
- Picklist
- Object
- Lookup**
- Formula
- Currency
- Long Text
- Rich Text

**Step 2: Choose label and name for the field**

Label\* Country Language

Name\* country\_language\_c

**Step 3: Set the options**

Status ACTIVE

Lookup Relationship\* Country (country\_\_vr)

Lookup Source Field\* Language

Searchable

Display in default lists and hovercards

Help Content

## Overview

- High Volume Objects (HVOs) now support lookup fields which was previously only available to Standard Volume Objects (SVOs).

## Business Justification

- Customers with SVOs with lookup fields can now migrate to High Volume Objects as lookup fields are now supported





# Lookup Fields for High Volume Objects

- Details

- New attribute for lookup fields called 'searchable' will let you know if a lookup field is searchable
- The following field types are supported as HVO lookup fields:

- Text
- Number
- Date
- DateTime
- Yes/No
- Object
- Picklist
- Currency
- Long Text
- Rich Text

- Considerations

- Faceted Field Filters are not supported for HVO lookup fields
- Supports filtering and sorting except for Rich Text, Long Text and text fields longer than 250 characters



# Lookup Fields for High Volume Objects in Reports

- Customer can report report on High Volume Object Lookup Fields similarly to what is available for Standard Volume Objects
  - Customers can apply conditional formatting by using the lookup fields
  - Can filter on all HVO lookup fields on Multipass Reports
- Considerations
  - Vault Reporting supports filtering on the HVO lookup field if the underlying field is searchable

- Learn more about [High Volume Objects](#)





# Object Reference Fields in Expressions

Lifecycle entry action that uses one object reference field to populate another one

Object Reference Field being populated

Value being populated directly by another Object Reference Field

## Overview

- Object reference fields will now be available to be used in the expression editor
  - These fields can be used directly, such as using one object record to set the value of another object record
  - There are also two additional functions to allow you to use the text of the object record label or the record ID – Text() and ID()
- This change will only apply to objects that reference other objects, and will be available in object, workflow, and lifecycle expression use cases

## Business Justification

- Interacting with object reference fields will bring additional flexibility and functionality to Vault expressions



# Object Reference Fields in Expressions

- Details:

- Object reference fields have been available in expressions already, but the use was limited and the data returned was inconsistent. The data returned might either be the field ID as a string or the field label as a string
- This change brings consistency allowing object reference field to be used directly, or the new additional functions can be employed to allow either the record label or ID to be used in the expression
  - ID() will return the ID of the record as text
  - Text() will return the label of the record as text

- Considerations

- This feature only applies to objects which have a field that references another object, it does not apply to Documents that have a field which references an Object
- This feature is not available in reports
- Existing expressions that use object Reference Fields will be upgraded to avoid regression:
  - Existing expressions that return the record label will be updated to be wrapped in a Text() function
  - Existing expressions that return the record ID will be updated to be wrapped in an ID() function



# Currency Formula Fields



Untitled Report >

Create Formula Field for [Untitled Report] ?

Object Test

Label

Return Type Currency ←

Currency Type Corporate

Minimum value -10000000000000000

Maximum value 10000000000000000

Decimal places 6

Formula Expression Fields | Functions | Operators

Search Fields

Check Syntax

## Overview

- This feature adds the formula field type, **currency**, to object formula fields
- Currency formula fields return numerical data formatted as a corporate or local currency

## Business Justification

- Provides the ability to indicate local or corporate currency which is automatically created on the object





Lifecycles and OneWorkflow

# Multi-Document Viewer UI Updates (for Workflows)

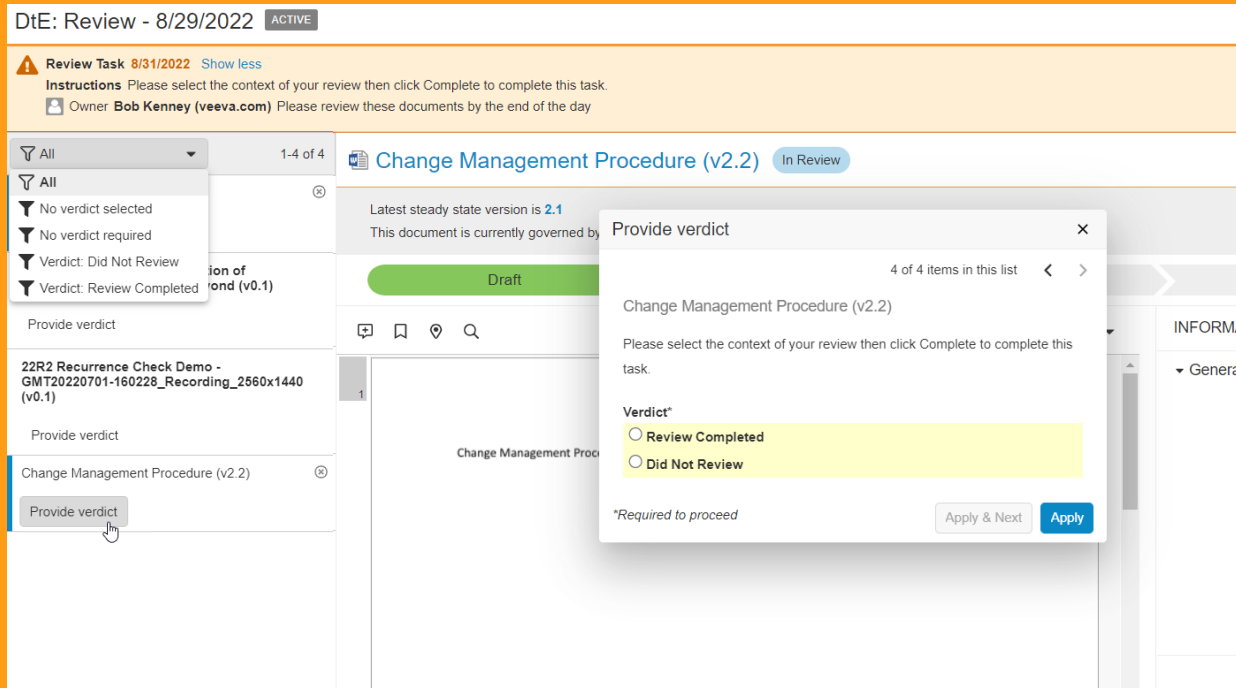


## Overview

- This feature makes several user experience enhancements to the multi-document viewer screen for users completing workflow tasks (see next slide)

## Business Justification

- Make it easier for workflow task participants to work with multiple documents



# Multi-Document Viewer UI Updates (for Workflows)



The screenshot shows a workflow interface for reviewing documents. A sidebar on the left allows filtering and infinite scrolling. A central pane displays document details, including a 'Provide verdict' dialog for 'Change Management Procedure (v2.2)'. A 'Provide verdict' button is highlighted. A 'Provide verdict' dialog is open, showing options for 'Review Completed' and 'Did Not Review'. The 'Apply & Next' button is highlighted. A 'Provide verdict' dialog is also shown for another document, '22R2 Recurrence Check Demo - GMT20220701-160228\_Recording\_2560x1440 (v0.1)'. A 'Provide verdict' button is highlighted. A 'Provide verdict' dialog is also shown for another document, 'Change Management Procedure (v2.2)'. A 'Provide verdict' button is highlighted. A 'Provide verdict' dialog is also shown for another document, 'Change Management Procedure (v2.2)'. A 'Provide verdict' button is highlighted.

Callouts:

- Sidebar allows filtering and infinite scrolling
- Paginate through documents in the workflow
- Scroll document and metadata behind dialog
- Button to open dialog to apply verdicts to documents
- Clicking a document changes the dialog to the verdict for selected document
- Apply & Next submits chosen verdicts and moves dialog to next available document; Apply submits chosen verdicts & closes dialog

- Considerations

- Verdicts not applied will not be saved, and no warning provided when closing the dialog



# Add Delegates to a User: Performance Optimization

Add Delegates

**Notice:** A maximum of 25 users may be delegates.

**Delegates\***

Kirstin Dreyfurst (veeva.com) X

**Start Date\***

MM/DD/YYYY

**End Date\***

Never

On

MM/DD/YYYY

Cancel Grant Access

## Overview

- This feature optimizes the performance of the user drop-down selection when adding new delegates by validating the user as being available as a delegate:
  - A banner is displayed to administrators on the Active Delegations page when optimization is in progress
  - A Hover message is displayed requesting a user be unselected if no longer able to be a delegate

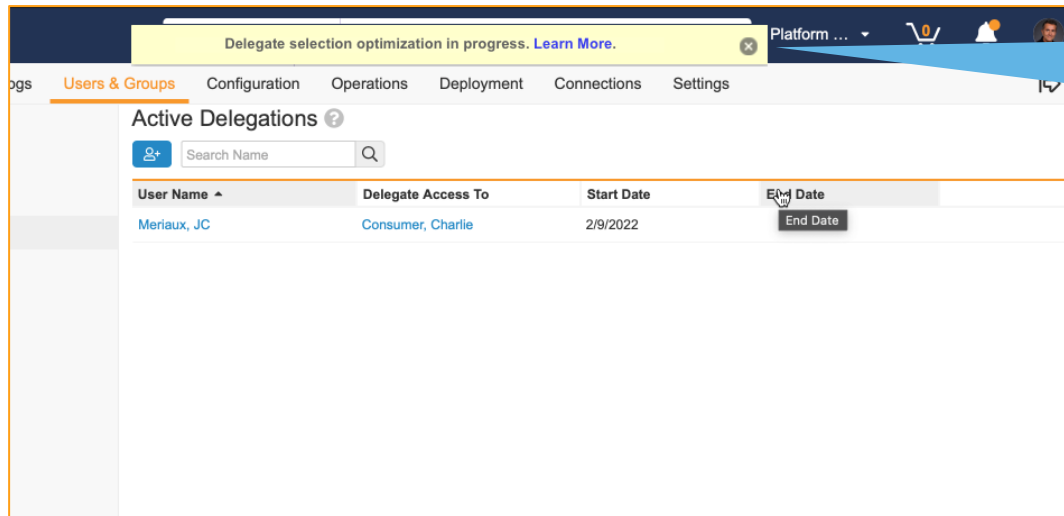
## Business Justification

- Between the time delegate users are selected and the time the user clicks “Grant Access” there is a possibility that one or more selected users no longer have the delegation permission

# Add Delegates to a User: Performance Optimization



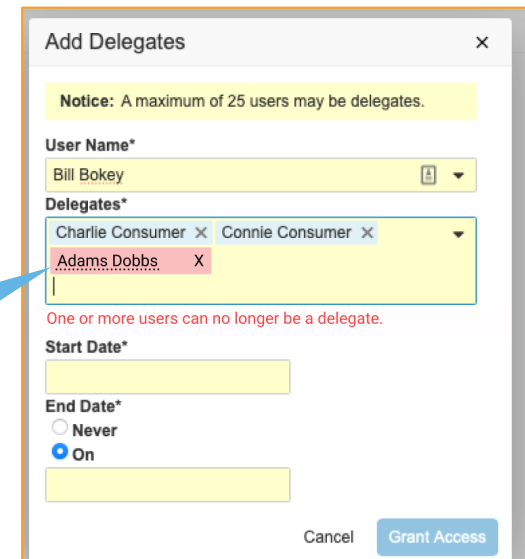
- Delegate selection is used in three places: Admin > Active Delegations, Vault Users > Delegate section (including also Custom tabs and business admin), and User profile



An administrator sees a Banner on the Active Delegation page warning that the “Delegate selection optimization is in progress. Learn More” (“Learn More” takes them to the Vault Help Page)

In the very rare occurrence of one or more selected users no longer having the delegation permission, the user is Warned that certain users cannot be selected (These users have a different pill color and hover message)

Note: In addition, the “Grant Access” button is made inactive, until all the ‘red pills’ are removed







# Pre-Populated Values in Document Workflow Field Prompts

Start Workflow

fields to begin this workflow.

**Review By\***  
mm/dd/yyyy

Medical

Legal

Regulatory

Adhoc Reviewer

**Audience\***  
Healthcare Provider

**Product**  
Restolar

\*Required to proceed

Cancel Start

Automatic population when values are already present on related document

## Overview

- Pre-populates document field values in Start and Task step field prompts and single verdict prompts in single document workflows. Requires values to be present in the related in the related document field.

## Business Justification

- Reduction of data entry steps while easing the flow of daily tasks.





# Limit Workflow Task Participants

Workflow

- Workflow Initiators opt-in to assign optional-task roles
- Automatically name envelope records
- Limit workflow participants selected by workflow initiator

Max number of participants per participant control



Error ×

The workflow action has encountered the following errors:

The number of participants selected [3] for [Adhoc Reviewer] exceeds the maximum number of allowed participants for a workflow [2]

## Overview

- Allows admins to define a maximum number of participants that may be selected for each participant control defined in the workflow's start step

## Business Justification

- Provide the ability for more control across workflow start step rules



# Limit Workflow Task Participants



- Details
  - This feature only applies when the participant control of a workflow start step is set to *Allow workflow initiator to select participants*
  - The set limit applies to all workflows and each participant control

- Learn more about [Task Participants](#)



# Multi-Record Workflows



Favorites ? 1-3 of 3

Submission Name	Application	Submission Type	Submission Subtype	Dossier Status	Lifecycle State
★ 0123	NDS 02918	New Drug Submission (NDS)	INITIAL		Planned
★ 0000	IND 144026	Original Application	Presubmission	Import Success	Planned
★ 1214	BE - 2019-001573-89	Original Application			Planned

VIEW

- Edit Columns
- Truncate Cell Text
- Unfreeze Column
- MANAGE
- Start Workflow
- PERFORM BULK ACTION
- 3 records

Send multiple object records on a single workflow

## Overview

- Users can now send multiple object records on a single workflow

## Business Justification

- Increases productivity and improves user experience for task participants



# Multi-Record Workflows

- Details
  - The object records included must all be from the same object
  - Workflows can be initiated from:
    - Object Tabs
    - Related Lists
    - Favorites
    - Saved Views
  - The workflow can only contain the records from the current view/page
  - Will support up to 100 object records at once
  - Existing object workflows will be automatically set to only support single object records, but can be updated to support multiple records

• Learn more about [Object Workflows](#)

Workflows >  
Create Workflow

**Details**

Label\* Object Record Workflow

Name\* object\_record\_workflow

Lifecycle\* Medicinal Product Lifecycle

Workflow Type\* Object

Version

Status **Editing**

Description

Use workflow for single object record ?

Workflow C...

This flag restricts the workflow to a single object record.  
[Learn more](#)

**Variables**





# Searching & Filtering

# Glossary Terms



The screenshot shows a web application interface for a glossary search. At the top, there is a search bar with the text "lymphoma" and a magnifying glass icon. Below the search bar, there is a section titled "Matches" with a sub-section "Term: lymphoma". The definition of lymphoma is displayed below. A callout box labeled "External Search Engine" points to the search bar. Another callout box labeled "Approved Glossary Term in Vault" points to the definition text. The background of the interface features a large image of red blood cells and a dark area with the text "New indication for lymphoma treatment" and the logo for "TEVBA Vevanatib (Injection 50mg)".

## Overview

- Allows users to select text in a document and search for approved Glossary definitions in Vault
- Users can also copy the term and definition to the clipboard for easy sharing

## Business Justification

- Will allow users with View Content permission to search definitions for commonly used terms directly in the document view panel

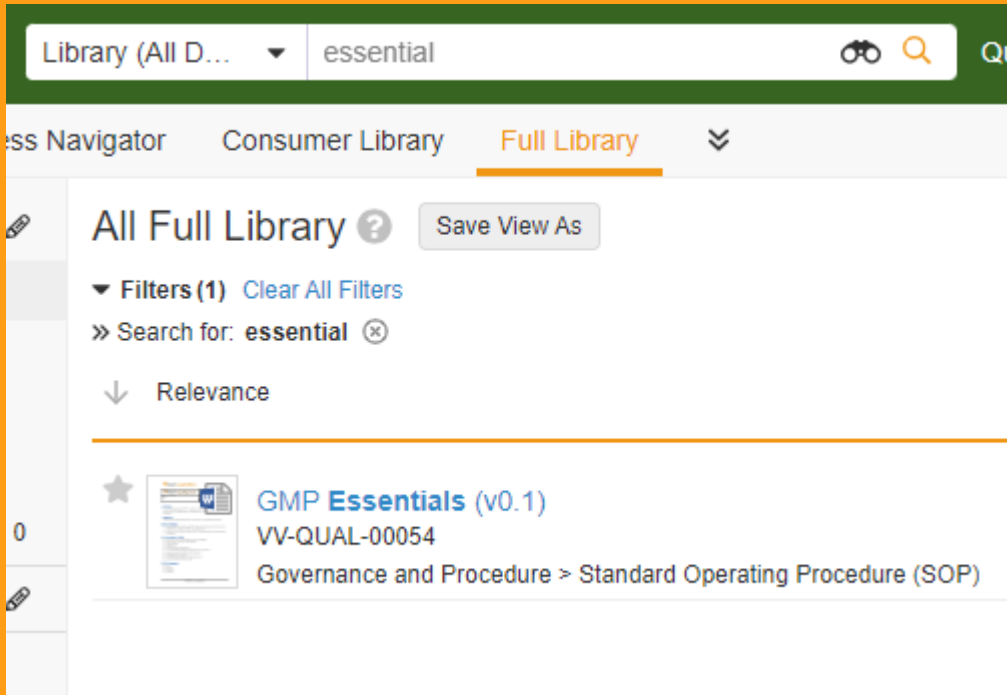


# Glossary Terms

- Details
  - Hold down the G key when selecting text in a document to search the Glossary
  - Administrators can build a library of Glossary Definitions and relate Glossary Definitions to each other for the purpose of language matching
  - Admins can view and report on Glossary activity using the Glossary Events object
  - Admins can also configure an external search engine that users can search
    - External Search URL Format Example: `https://www.cancer.gov/publications/dictionaries/cancer-terms/def/{{searchTerm}}`
- Considerations
  - Disabled by default and controlled by a two-way flag, visible in Admin>General Settings>Documents
  - Glossary terms must be Approved Definitions in Vault to appear in the Glossary Search
- Learn more about [The Glossary](#)



# Precision Highlighter



## Overview

- The user search experience will now highlight inflected forms and synonyms

## Business Justification

- Inclusion of these highlighted terms will give the user immediate visibility to why the result was returned
- Allows users to readily determine similarity in returned search

# Saved Views on Dynamic Tabs



Filter a related object list and Show in Tab

Name ▲	Type
Lehigh Valley Labs - Allentown	Initiated

Save View is available with the Filters in place

« Back to previous page

All Sites ? Save View As

▼ Filters (2) Clear All Filters

› Parent Organization: Lehigh Valley Labs ⊗

› Search for: Allen ⊗

Name ▲	Type	Lifecycle State
★ Lehigh Valley Labs - Allentown		Initiated

## Overview

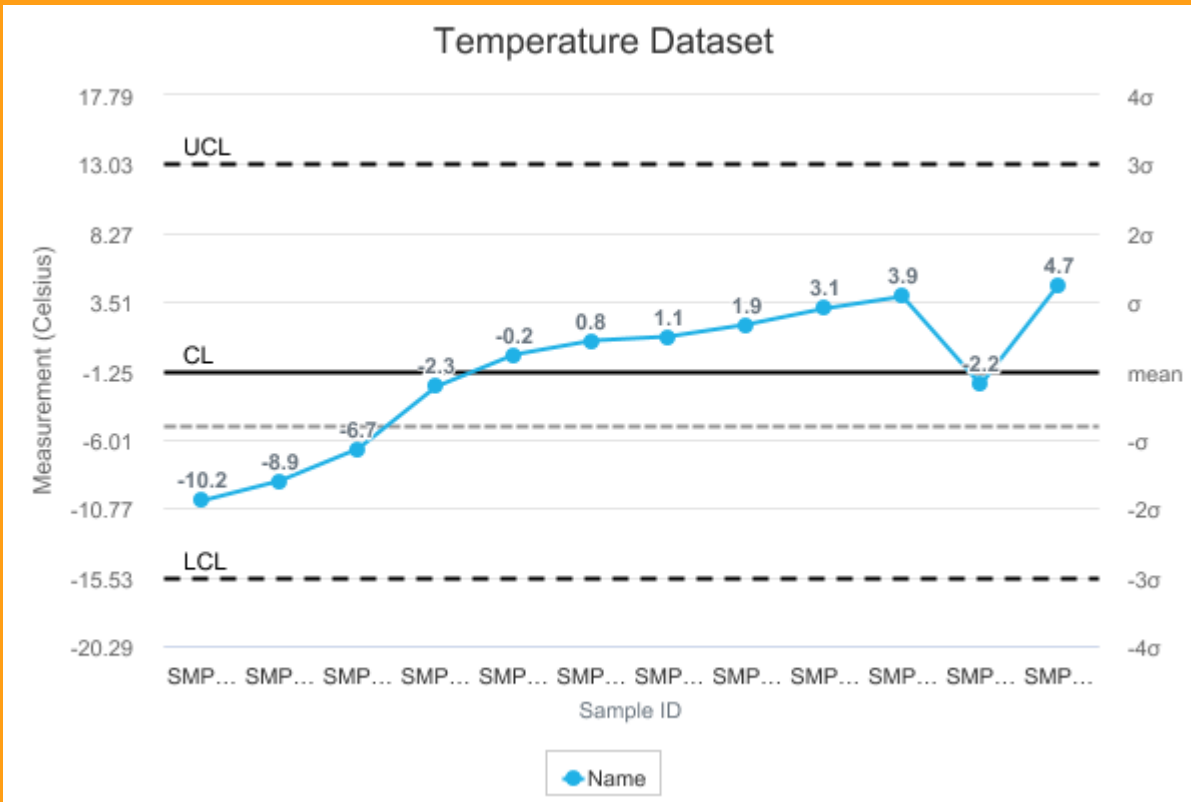
- This enhancement extends the Save View functionality to a related object list when a user has selected 'Show in Tab'





Reporting

# Control Chart



## Overview

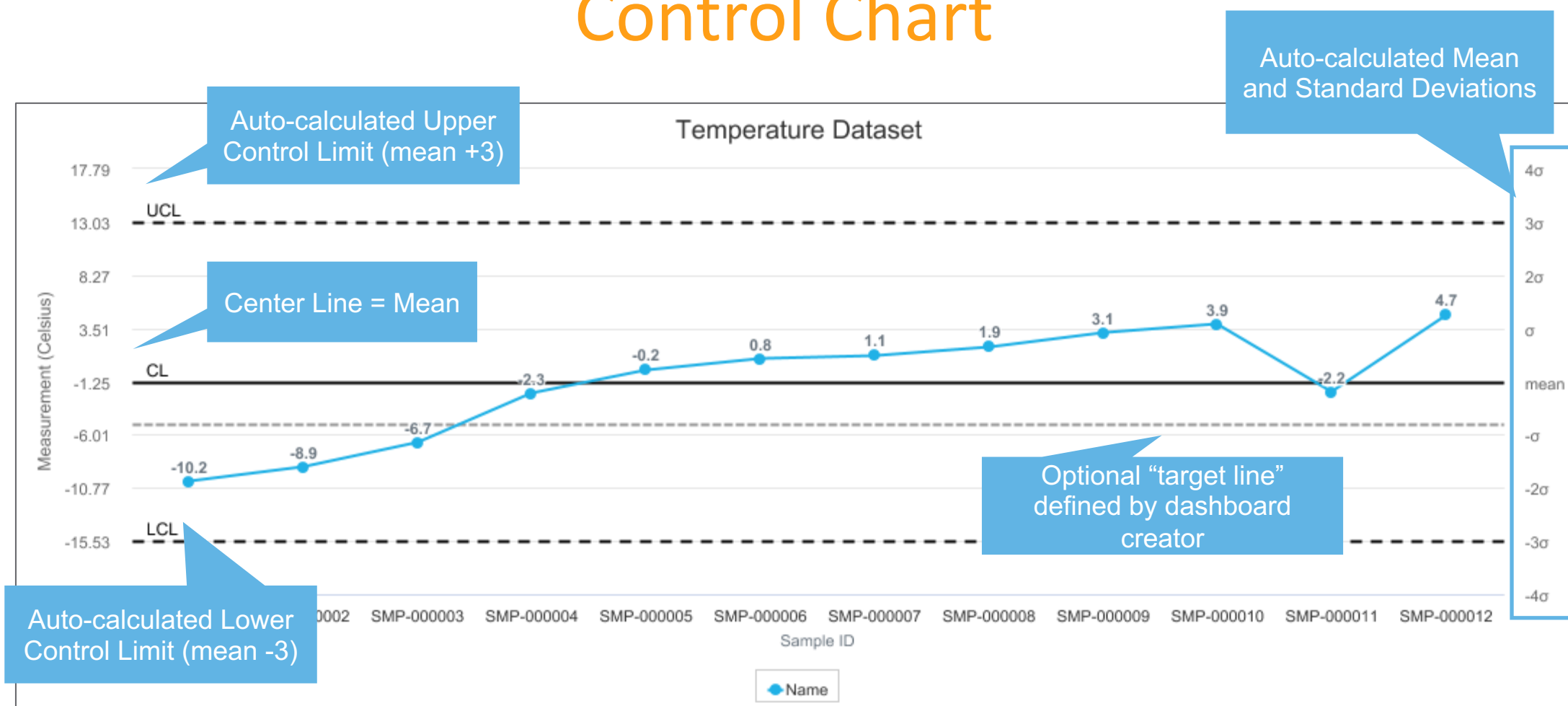
- Users that create visualizations of data returned by a Vault Report have a new Vault Dashboard element called a Control Chart

## Business Justification

- Control Charts help customers visualize variance within the data returned by a Vault Report



# Control Chart



- Considerations

- A Control Chart requires a Vault Report with at least one field used to group results – a “group by” field is available for use on the x-axis



# Document with Object Report Types



Create Report Type ?

Details

Label\* Document with Organization

Name\* document\_with\_organization

Status Active

Source Custom

Class\* Standard

Description Document with Impacted Facilities

Report Configuration

Primary Reporting Object  
Document

+ Add Related Object

Related Object  
Impacted Facilities

Document (53)			Organization (36)
Document Name	Document Number	Document Status	Impacted Facilities
Analytical Method Validation Procedure (v1.0)	VV-QUAL-00001	Effective	Baltimore
Annual Review of Drug Procedure (v1.0)	VV-QUAL-00002	Effective	Baltimore
Batch Processing Instruction and Recording Procedure (v1.0)	VV-QUAL-00003	Effective	Baltimore
Calibration of Balances Procedure (v1.0)	VV-QUAL-00004	Effective	Baltimore
Change Control Procedure (v1.0)	VV-QUAL-00005	Effective	Baltimore
Computer System Validation Procedure (v1.0)	VV-QUAL-00006	Effective	Baltimore
Continuous Improvement Procedure (v1.0)	VV-QUAL-00007	Effective	Baltimore
Control of Non-Conforming Product	VV-QUAL-00008	Effective	Baltimore

## Overview

- This feature allows System Admins to create report types that show documents first, followed by documents' associated object records

## Business Justification

- Enables customers to prioritize documents in reports that combine documents and their related records





# Usability & Interface

# Editable Vault Name



General Settings ?

Vault Information

Domain Name: sc20.com

Vault ID: 95359

Vault Name:

Vault Version: 22R2.4

Vault URL: <https://sc20-lauren.veevavault.com>

POD: VV1-1135

## Overview

- System Administrators can now edit the name of a Vault in **Admin > Settings > General Settings**
- This section now displays a Vault's URL

## Business Justification

- Making the Vault Name editable removes the need for a customer support ticket
- Changing a Vault's URL still requires customer support





# Domain Users: UI Enhancements



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: JC Meriaux

**Primary Information**

Domain Status: Active  Domain Admin

User Name: [jc.meriaux@mh-unique.com](#) Last Domain Login: 06/05/2022 10:03 AM PDT

Email: [jc.meriaux@veeva.com](#)

**Vault Memberships**

Search

Vault	License Type	Security Profile	Status
21R2 Unique Master	Full User	Vault Owner	Active
MedComms	Full User	Vault Owner	Active
Platform Demo	Full User	Vault Owner	Active

**Contact Information**

**Notification Emails**

**Settings**

## Overview

- The domain user UI has been optimized to support domains with a large number of Vaults
- The Vault Membership UI has been enhanced to be more time efficient and intuitive

## Business Justification

- When a user is a member of multiple vaults the editing of the profile can be slow due to the page loading, this speeds up the process and makes the administration of vault membership more efficient





# Domain Users: UI Enhancements

- Details
  - 25 vault memberships displayed per pagination
  - Additional configured attributes can be displayed in the vault membership pane
  - All membership can be exported for a specific user using the 'Export Memberships' button to a csv file
  - Online editing is enabled for Security Profile, Licence Type and Status fields
  - Users are now added to a Vault via an 'Add' button
- Considerations
  - Restrictions can happen that make the field read-only:
    - The user has access to a Vault but cannot edit memberships
    - A PMO membership cannot be re-activated, so all fields are read-only
- Learn more about [Domain User Management](#)





# Enterprise Home Page: New Grid View with Updated Card View

New Grid View

Vault Name	Last Login	Application Family	Type	Domain	My Tasks
MasterPM	seconds ago	Commercial	Demo	sc20.com	0
Lauren	about 4 hours ago	Commercial	Demo	sc20.com	0

Updated card view

The card view displays three vault cards for biorad.com:

- Platform** (8 minutes ago): My Tasks (2)
- Tab Collection** (Delegated from: Jenna Smith, bob.ng@veeva.com): My Tasks (1)
- Tab Collection** (10 minutes ago): My Tasks (3)

## Overview

- This release introduces a new Grid View that provides ability to search, filter and sort Vaults
- Users can toggle between Grid View and Card View
- Vault selector picklist, Card View, and Grid View indicate if a Vault is unavailable because it is undergoing maintenance (i.e. new release) or a System Admin placed it in configuration mode

## Business Justification

- As customers deploy more and more Vaults, users need to work in a multi-Vault environment



# Enterprise Home Page: New Grid View with Updated Card View



- Details
  - This feature scales the user experience for individuals working in many Vaults (1,000+)
- Considerations
  - The Enterprise Home Page is visible to users if
    - There are multiple Vaults in your organization's domain
    - A System Admin checked the **Enable My Vaults Page** checkbox in **Admin > Settings > Domain Information**
- Learn more about [Using Grid View](#)





# Admin & Configuration

# Query Governor



```
{
  "responseStatus": "FAILURE",
  "errors": [
    {
      "type": "OPERATION_NOT_ALLOWED",
      "message": "Leading wildcard is not allowed."
    }
  ]
}
```

SELECT id FROM documents  
 FIND('\*test')

## Overview

- System monitoring for VQL queries consisting of a set of rules that return errors and warnings via the API in case a VQL query is identified as being harmful to overall system performance
- With this release the first rule is launched in which the FIND clause no longer supports leading wildcards. This change affects API v22.3+, and existing integrations are not affected

## Business Justification

- Alert system for expensive queries to ensure long term Vault stability & performance
- Learn more about [Vault Queries](#)





# Notifications: Email Notification Status

Email Notification Status ? Last modified about 3 hours ago

Filters

Send Date is in the last

Showing emails for 9/17/2022 to 10/1/2022 (10 results)

Send Date	Recipient Name	Email Address	Status	Error Message	Document Number
10/1/2022 8:47 AM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Sent		
9/30/2022 6:20 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		VV-QUAL-00052
9/30/2022 6:08 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		VV-QUAL-00053
9/30/2022 4:59 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		

Notification status

## Overview

- In the operations tab, administrators can view email notifications and determine whether they were successfully delivered

## Business Justification

- Administrators say they would like to provide proof that certain notifications were delivered
- Previously customers would need to submit a ticket to Veeva Product Support to obtain this information





# Notifications: Email Notification Status

- Notification Status Type
  - **Sent** - The email was sent from Vault, but not delivered yet
  - **Delivered** - The email was successfully delivered to the recipient. It normally takes a day for sent emails to change to delivered
  - **Failed** - The email was not delivered. This is usually due to an invalid email recipient or email domain. More details can be found in the Error Message column
  - **Skipped** - Vault skipped sending the email because the intended recipient's Email Preferences are configured not to send email notifications of this type
  - **Pending** - The notification is included in a summary email that is not sent yet. The summary email will be sent depending on the interval that was set in Email Settings
  - **Summary** - The notification is included in a summary email already sent from Vault. The summary email that includes these notifications will reflect the delivery status
  - **Sent - Unknown** - The email has been sent, but due to a system issue, the delivery status is unknown. A notification's status enters this state if the delivery status cannot be obtained after 10 days. The email may still be delivered





# Notifications: Read & Unread status



Bulk Action to Mark All as Read

The screenshot shows the 'All Notifications' page. At the top, there is a dropdown menu for 'Date Received' and a '1-6 of 6' indicator. A 'PERFORM BULK ACTION' menu is open, showing 'Mark All as Read' and 'Delete All 6 Notifications'. The notification list includes:

- 10/3/2022**
  - Equipment Calibration SOP has been sent to you by Kevin Harvey (veeva.com). (2 minutes ago)
  - Docs Uploaded for Demo Including SM Docs has been sent to you by Kevin Harvey (veeva.com). (17 minutes ago)
- 10/1/2022**
  - The following document(s) have been approved for use. (2 days ago)
    - SOP for Cleaning EquipmentUse this link, [SOP for Cleaning Equipment](#), to access the document(s) and confirm that you have read and understood its content. If you have any questions, contact the Training Manager.
- 9/30/2022**
  - New Product Information has been sent to you by Kevin Harvey (veeva.com). (3 days ago)

Mark as Read envelope icon

## Overview

- A Read and Unread status has been added for each notification. Users can mark unread notifications as Read from the Notifications page

## Business Justification

- This web feature supports the introduction of a Notifications tab in Vault Mobile
- Notifications will have a Read and Unread status, which will assist users in focusing on notifications they have not yet reviewed



# Person Object: Duplicate Person Record Detection



Information on user being created

Similar Records Found

The record you're trying to create looks like an existing record. Please check similar records below before proceeding.

Name: Eric External  
Email: kevin.harvey1@veeva.com

1-1 of 1

Name	First Name	Last Name	Created Date	Email	Mobile
Eric External	Eric	External	10/1/2022 3:40 PM BST	kevin.harvey@veeva...	

Cancel Create

Information on potential duplicate record

## Overview

- This feature helps detect the creation of duplicate person records by alerting users of potential duplicates

## Business Justification

- Clean and accurate Global Directory data is becoming increasingly important as customers look to adopt features that depend on data reuse like EDL Automation and Person/ Product/ Org Streamlined Reuse
- Duplication prevention on Person record creation will help customers to improve data quality and reduce time-consuming clean-up efforts



# Person Object: Duplicate Person Record Detection



Person Settings ?

**Duplicate Person Detection**

- Enable duplicate detection on new person records
  - Match persons only in the same object type
  - Allow user to proceed with creating duplicate person records

---

**Duplicate Match Rules**

- Exact match on Email
- Exact match on First Name and Last Name
- Fuzzy match on First Name and Last Name; Exact match on Mobile Phone
- Exact match on First Name Initial and Last Name; Exact match on Mobile Phone
- Fuzzy match on First Name and exact match on Last Name
- Enable duplicate detection in an additional field
  - Select Field

Comparison Method

- Exact match
- Fuzzy match

If an exact match on email is found, then an error is displayed, and the Duplicate Record dialog is not launched

Additional field for Duplicate Detection

## Considerations

- Duplicate Person Detection can be disabled in Settings
- Matching rules can be enabled/disabled as required
- Potential Person object matching can be made on the following fields:
  - Email
  - First Name
  - Last Name
  - Mobile
- One additional field can be configured to be used in Duplicate Detection

# Scheduled Data Exports: Update Scheduled Start Time



Job Definitions >  
Scheduled Data Exports

## Details

### Title

Scheduled Data Exports

### Name

scheduled\_data\_exports\_\_v

### Job Owner

System

### Schedule

Runs daily at 1:00 AM (GMT-05:00) Eastern Standard Time (America/New\_York)

## Overview

- Admins are able to update the scheduled start time of the scheduled data export job

## Business Justification

- Feature allows admins the ability to schedule data exports based on business needs

- Learn more about [Scheduled Data Exports](#)





# Scheduled Data Exports: Update Scheduled Start Time

Job Definitions >  
Scheduled Data Exports

**Details**

**Title\***  
Scheduled Data Exports

**Name\***  
scheduled\_data\_exports\_\_v

**Job Owner\***  
System

**Schedule\***  
Daily

**Time\***  
12 : 00 AM (GMT-05:00) Eastern St...

**Status\***  
Inactive

**Type\***  
Scheduled Data Exports

Job Definitions >  
Scheduled Data Exports

**Details**

**Title\***  
Scheduled Data Exports

**Name\***  
scheduled\_data\_exports\_\_v

**Job Owner\***  
System

**Schedule\***  
Daily

**Time\***  
1 : 00 AM (GMT-05:00) Eastern St...

**Status\***  
Inactive

**Type\***  
Scheduled Data Exports





# Scheduled Data Exports: Export Picklist Labels and Names

filing_level__v	filing_level__v.name
Country	country_level__v
Site	site_level__v
Site	site_level__v
Study	study_level__v
Study	study_level__v
Study	study_level__v
Study	study_level__v

Document picklist

picklist9__c	picklist9__c.label
blue__c,green__c,red__c	Blue,Green,Red
blue__c,green__c,red__c	Blue,Green,Red
blue__c,green__c	Blue,Green

Object picklist

## Overview

- Scheduled Data Exports of a document, document version, and object metadata now include picklist names and labels

## Business Justification

- This feature makes integrations easier
- By including both the names and labels for Picklists, we enable customer integrations to have a convenient way of mapping names to labels





# Scheduled Data Exports: Document Metadata in Default Alphabetic Order

## Overview

- Scheduled Data Exports of document and document version metadata now have a default alphabetic order for column headers.

## Business Justification

- This feature makes integrations easier
- Customer integrations can reliably expect metadata in alphabetic order


- Learn more about [Scheduled Data Exports](#)



# Delegate Access Feature: Enablement in All Vaults



## Delegate Access

- Enable Vault Level Delegate Access
- Allow non-Admin users to delegate access to their own accounts
- Delegate access allowed only among group members 

## Overview

- The Delegate Access feature is now made available in all Vaults
- Administrators can enable this feature in Vault Settings (General Settings)

## Business Justification

- This provides a secure and audited process for you to designate another user to handle Vault responsibilities on your behalf on a temporary or ongoing basis





# System Managed Users – Default Email and Security Policy



- Overview

- System Managed Users will have the following change
  - eMail: no-reply@veeva.com (instead of dev.null@veeva.com)
  - Security Policy: System Managed (instead of “Basic”)

- Business Justification

- Continuation and finalization of standardization efforts for system managed users from 22R2 which was a pending request coming from Audits

- Considerations

- *This feature will be released ahead of the 22R3 General Release as part of a 22R2 Maintenance Release*

- Learn more about [System Managed Users](#)



# Test Data Packages: Override Default Reference Lookup Fields



- Overview

- When creating *Test Data* packages, Admins can now override the default reference lookup to an object with any one of the unique fields available for the object.

- Business Justification

- Previously, test data packages did not allow you to select a different object reference lookup field apart from the default (ID or link\_\_sys). This change was made to align with the existing behavior of migration packages and to provide more flexibility for test data packages

- Learn more about [Configuration Migration Packages](#)





# Outbound Packages: Support Migrating Group Data

## Overview

- Groups (and inter dependent components – see below) can now be included in Configuration Migration Packages and Test Data Packages so that deployment tasks can be reduced
  - Interdependent components include: security profiles, document fields, object lifecycles, document lifecycles, object workflows, saved views, dashboards

## Business Justification

- Migrating groups between Vaults is a frequent requirement in post implementation deployment activities that consist of configuration migration between sandbox and production Vaults. Several components have dependencies on group data and today groups are migrated using Vault Loader as separate deployment tasks increasing the complexity and time of a deployment

- Learn more about [Outbound Package Types](#)





PromoMats

# Automated Image Rendition Setting Removal



DAM

- Enable InDesign Auto Linking
- Enable enhanced PSD file image conversion

## Overview

- Removed the Application Setting checkbox for “Enable Automated Image Renditions”

## Business Justification

- The Automated Image Renditions feature continues to provide high quality Image Renditions via configuration of Rendition Types without any changes to the existing feature or configuration





# Automated Image Rendition Setting Removal

- Details
  - The “Enable enhanced PSD file image conversion” Application Setting is now available for use without the prior enablement of the “Enable Automated Image Renditions” setting
  - The maximum number of Automated Image Rendition Rendition Type that you can create has increased to 25
  
- Learn more about [Automated Image Renditions](#)

# Related ISI and Related PI Relationships added to Base Document Type



RELATIONSHIPS	
▶ Components (2)	
▶ Linked Documents (6)	
▶ Related Documents (1)	
▶ Related ISI (0)	
▶ Related PI (0)	

New Relationship Types

## Overview

- New standard Related ISI and Related PI relationship types are added to the Base document type and makes them available for use on all document types

## Business Justification

- Helps support the Engage Links for Vault Documents CRM feature where users will be able to share URLs for Vault Documents via social apps



# Related ISI and Related PI Relationships added to Base Document Type



- Details
  - When a document is shared, CRM will request a token from Vault and pass CRM as the Distribution Channel Type
  - When the recipient accesses the URL, they will be passed to their browser and the Vault document will appear in the Vault Viewer where the Related ISI and PI documents will be available in the side panel
  - Relationship Types can be deactivated in Admin>Settings>Application Settings>PromoMats Settings
- Considerations
  - The “Related ISI” and “Related PI” Relationship Types will be visible in the Relationship side panel for **all** document types
  - The existing Approved Email ISI and PI relationships are being leveraged so deactivating these relationship types will deactivate them from Approved Email document types as well



# Asynchronous Auto Publish to CRM for Approved Email Fragments



## Overview

- Vault automatically creates email fragments asynchronously, enhancing the Auto Publish to CRM for Approved Email Fragments feature
- Vault notifies users when fragments are created and available for use within Vault

## Business Justification

- Users are now free to complete other tasks since email fragment creation process now runs in the background and notifies the user upon completion



# Claims and Modular Content Data Model Changes

With multi-country and multi-product capability becoming available, product and country field can be related

The image shows two side-by-side screenshots of a software interface. The left screenshot is titled 'Claim Details' and shows fields for Name (Claim-000001), Match Text (Patients receiving Natevba ex), Primary Country (Global), Primary Product (Natevba), Language, Category (Efficacy), and Text Asset Type (Claim). The right screenshot is titled 'Text Details' and shows fields for Name (Reusable Text-000001), Match Text (Chemotherapy is the stand), Primary Country (Global), Primary Product (Natevba), Language, Reusable Text Type (Copy), and Text Asset Type (Reusable Text). Both screenshots have blue boxes highlighting the Primary Country and Primary Product fields.

Management of claims and reusable text is now possible via the same object using different object types and allows easy reuse for content modules

## Overview

- Adds new configuration to PromoMats Vaults to make the creation, management, and usage of text assets (including claims and reusable text) and content modules simpler and more intuitive
- Introduces new standard objects and object fields to assist with the Enhanced Suggest Links features

## Business Justification

- Management of claims and text within Vault has been cumbersome based on customer feedback
- Text used with content modules is currently one time use which limits capabilities and customer use cases which its hindering flexibility and expansion





# Claims and Modular Content Data Model Changes

- Considerations

- Customers with claims and/or content module records created in their Vault will have these changes provisioned as inactive. Additional configuration and activation will be required to fully leverage the new data model changes
- Customers that do not have claims and/or content module records created in their Vault will receive most data model changes automatically. Please refer to the help link below for more details.
- Implementing these data model changes is necessary to fully harness the power of the new Enhanced Suggest Links capability
- Security and permission sets will be required for users who need access to the new object types under `annotation_keywords__sys`
- Rich text will no longer be used for content modules

- Details

- To review all data model changes, please reference the data model changes in the appendix of this presentation



# Enhanced Suggest Links



The screenshot displays the Veeva Vault interface for a document titled "Submission to Health Authority". The document details on the right include:

- Name: Natevba Brand Stemming
- Document Number: GL-VS-220
- Description: -No Stemming
- Version: 0.1
- Status: Draft
- Type: Material
- Subtype: Internal Cor
- Country: Global
- Product: Natevba
- Lifecycle: Material
- Language: English
- Tags: Safety, Dosing

A "MANAGE" menu is open, with "Run Suggest Links" highlighted. Other menu items include "Add to Cart", "Send as Link", "Copy Link", "Export All Files", "Download Notes", "EDIT", "Check Out", "Check Out to Vault File Manager", "Export Annotations", "Import Document Links", "Upload New Version", "Create Draft", "Re-render Document", "Re-render Automated Image Renditions", "PowerPoint Rendition Settings", and "Make a Copy".

On the left, a document list shows "Natevba Brand Plan Support (v0.1)" with a link from "Reusable Text-000003" to "MTV-000071". Below it, a "Claim-000011" document is shown with a link from "Claim-000011".

## Overview

- Improves the Suggest Links matching capability by moving the search and match functionality to utilize Vault Search, the addition of Suggest Links action to support the lifecycle process and incorporation of Multi-Product and Multi-Country matching capability

## Business Justification

- Increase flexibility and performance of matching capability and consistently build out features to facilitate daily operations

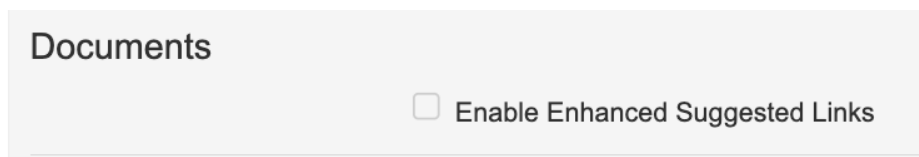




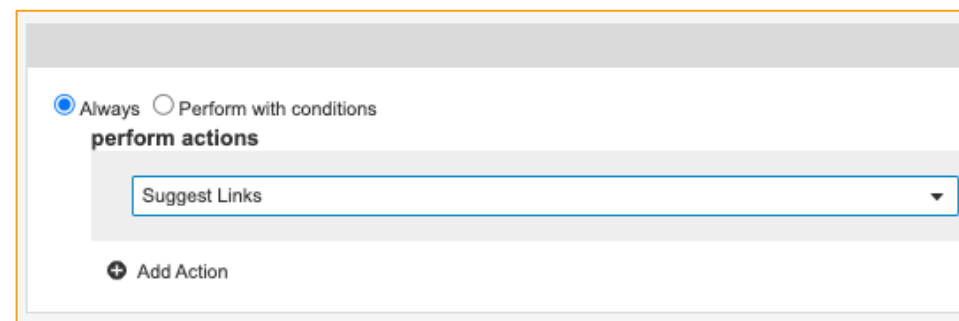
# Enhanced Suggest Links - Overview

- Details

- Enhanced Suggest links is a new claims matching capability which is separate from the previously available suggest links capability (referred to as platform suggest links) and aims to replace it long term. For now, customers have the ability to decide whether to activate Enhanced Suggest Links or keep using the platform suggest links.
- Enhanced Suggest Links can be enabled/disabled by an administrator in the Vault Settings



- An Enhanced Suggest Links State Entry Action has been made available
  - Vault will run Enhanced Suggest Links and the user who initiated the state change or the workflow that contains the state change will receive a success/error notification upon completion
  - Users who will need to accept/reject Suggested Links will still need the Annotate and Edit Relationship permission on the appropriate lifecycle state
  - A browser refresh will be required to see any created Suggest Link annotations

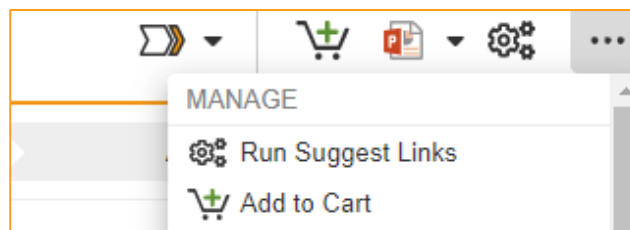




# Enhanced Suggest Links - Overview

- Details

- An Enhanced Suggest Links User Action has been made available
  - Users will need the Annotate and Create Relationship permission on the appropriate lifecycle state in order to successfully run Enhance Suggest Links
  - The user who initiates the action will receive the success/error notification upon completion
  - A browser refresh will be required to see any created Suggest Link annotations



- Enhanced Suggest Links can be run multiple times on the same document version and duplication Suggest Links annotations will not be made
  - Suggest Links cannot be brought forward

# Enhanced Suggest Links – Under the Hood



- Details

- Enhanced Suggest links will **only use the documents Country, Product, and Language** values to filter the Text Assets records that are available to be linked
  - Enhanced Suggest Links only support the standard country\_\_v, product\_\_v, and language\_\_v fields at this time
  - Language will only be available on the document if ‘Enabled multi-lingual document-handling’ is enabled in the Vaults Language and Region settings. Please review recent data model changes to the language fields for text assets.
  - Empty values on Country and Product will be treated as values (null) rather than wildcards and look to match Text Assets that also have these corresponding values (null)
- Enhanced Suggest Links will look through up to 10,000 records when being performed based on the above filtering criteria (previously only 500)
- Text Assets will need to be in the Approved or Steady State in order to be located for matching
- Enhanced Suggest Links will support multiple Country and Product values on the Text Asset
  - Enhanced Suggest Links will look through the Text Assets Product and Country values as well as any Join Object Records that may exist in the Text Asset Country and Text Asset Product records
- Enhanced Suggest Links will look through all standard Text Asset Object Types and Match Text Variations
  - Match Text Variations will need to be approved



# Enhanced Suggest Links - Considerations



- Considerations

- Implementing the Claims and Modular Content Data Model Changes will be key to fully harness the power of the new Enhanced Suggest Links capability
- Migration or copy of your claims is not required, as Enhanced Suggest Links will still find existing claims for matching based on the 'Base Claim' object type on the text asset object
- Enhanced Suggest Links does not support filtering for custom fields on the Text Asset record
- Enhanced Suggest Links treats an empty filtering field as a null value, which means any text assets with empty country or product field (including multi-product & multi-country fields) will only match against documents with empty country and/or product field.
- Wildcards are not supported in Enhanced Suggest Links matching. For any existing claims that use wildcards, the matching capability will still consider claim records which include wildcards and simply ignore the wildcard in the match text (consider removing stand alone wildcards positioned in the middle of a match text)





# Enhanced Suggest Links – Considerations cont.



- Considerations
  - Enabling Enhanced Suggest Links will remove the icon to perform Suggest Links from the document viewer window. It will be required to add a User Action or State Entry Action where Suggest Links will need to be performed
  - Removing Suggest Links is still performed via the Remove Suggest Links Icon on the document viewer
  - Enhanced Suggest Links will ignore the Document Type Suggest Links Action enablement setting
  - Enhanced Suggest Links will utilize the Document Type Suggest Links Target enablement setting
  - 500 records per combination of match text and field values is still enforced
  - All Text Asset records will need a Link Target to be moved to the Approved State
  
- Learn more about Enhanced Suggest Links

# Enhanced Suggest Links vs. Platform Suggest Links (Legacy)



	Platform Suggest Links	Enhanced Suggest Links
Suggest Links Matching Record # Consideration <sup>1</sup>	500	10000
Supports Wildcards in Claims Match Text	Yes	No longer needed due to enhanced search and matching capability
Multi-Country, Multi-Product Matching Support	No	Yes
Search Capability	Legacy	Vault Search Engine including Stemming (22R3) and Stop Word Replacement <sup>2</sup>
Entry Action Automation	No	Yes
Matching against custom object fields	Yes (up to 5)	Currently Not
Language Matching Support	No	Yes

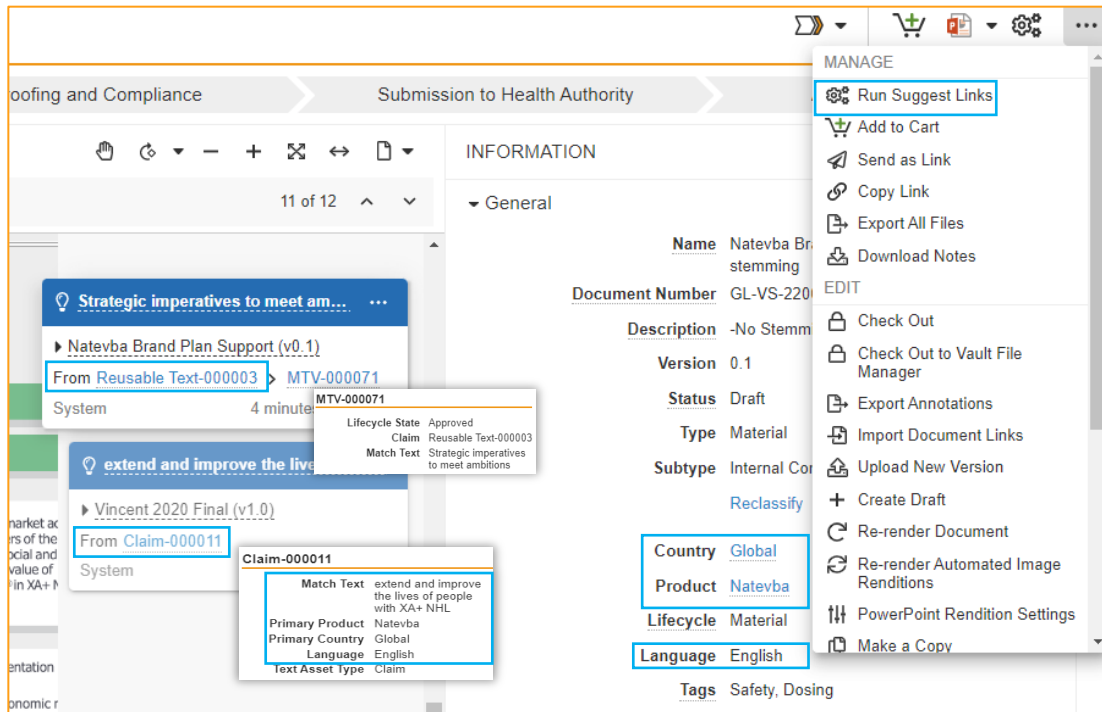
<sup>1</sup> The amount of records against which the search engine looks for potential matches

<sup>2</sup> Learn more [about Stop Word Replacement here](#)



# Enhanced Suggest Links & Data Model Changes

With 22R3 we are introducing several changes to the claims capability and connected data model. If you are using claims and content modules, please make sure to direct your attention to the following slides:



- Claims and Content Module Data Model Changes
- Multi-Product and Multi-Country Support for Text Assets
- Multi-Product and Multi-Country Support for Content Modules
- Enhanced Suggest Links

# Vault CRM to PromoMats Connection



- New connection that integrates Vault CRM to PromoMats and utilizes Spark to allow content created in PromoMats to be available and in sync in Vault CRM.
  - Changes made to a document within PromoMats will also be reflected in the Vault CRM documents
  - Documents reviewed and approved in PromoMats will be accessible to sales reps within Vault CRM without needing access to PromoMats
  - Maintains “single source of truth” for documents
- Considerations
  - Unlike Crosslinks, the document created in Vault CRM will retain the original content as the source file instead of a viewable rendition
  - Admin will see a new Doc Type Group and the new connection, but end users will not see a change within PromoMats

# Copy Source of Text Assets



▼ Details

**Match Text** Patients receiving Natevba experienced a 45% reduction in risk of pro

**Product** [Natevba](#)

**Country** [Germany](#)

**Source Text Asset** [CL-000001](#)

**Permalink Test**

**Category**

**Claim Type**

**Name**

**CL-000001**

**Match Text** Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma

**Category** Efficacy

**Product** Natevba

## Overview

- Introduces a new standard field called 'Source Text Asset' on the Text Asset object. This field automatically populates on a newly created record with the source record when it is created via the Copy Record action.

## Business Justification

- Allows to trace text assets (especially claims records) back to their initial source
- Facilitates traceability of text assets in a global to local governance model.
- Removes the chance of human error





# Copy Source of Text Assets

- Details
  - The field Source Text Asset can be used to assist with object lifecycle user- and entry actions
  - The field Source Text Asset can be used to build reports to show Source to Copy and Copy to Source information
- Considerations
  - The field Source Text Asset needs to be added to the respective object page layout for the end user to see
  - The field Source Text Asset automatically populates when the ‘Copy Record’ action is performed on a Text Asset, but the field can be edited if needed
  - Will not retroactively populate copied records

# High Resolution Presentation Slides for CRM & Engage



## Integration

- Enable CLM Integration with Auto-Publishing
- Enable CLM Preview ?
- Render Presentation Slides in High Resolution

Optional application setting to enable high resolution generation

## Overview

- This feature allows high resolution generation of CLM Presentation Slides for use with CRM and Engage
- This setting will allow Vault to render newly created CLM presentation slides at 96 DPI - an increase from 72 DPI

## Business Justification

- This feature will improve image resolution in CRM & Engage, and resolve issues that could occur in some instances where CRM slideshows appeared pixilated when rendered in low resolution



# High Resolution Presentation Slides for CRM & Engage



- Details (Optional)
  - By default, MS PowerPoint exports images at 96 DPI, however when converting images for CLM Presentations with CRM they are created at 72 DPI. By increasing the resolution to 96 DPI images will appear correctly in high resolution
  - Admins can enable the feature from within Settings > Application Settings > Integration by checking the new “Render Presentation Slides in High Resolution” Setting
- Considerations
  - This feature will be disabled by default on all Vaults
    - If the setting is disabled, PNG slides will render at 72 DPI which is the existing behaviour
- Learn more about [Working with CLM Content](#)







# eCTD Submission Package Rendition Type

- New rendition type to support uploading a .zip package containing multiple clean version documents to a promotional material
  - Unzipped contents of the rendition type .zip package will appear within the Clean Material section of the eCTD compliance package binder
  - Available to both Pre-clearance and Post Marketing compliance packages
- Considerations
  - Once configured, the new eCTD Submission Package rendition type must be applied to the document type containing Promotional Materials
  - The rendition type .zip package must be added to the Materials prior to generating a compliance package binder for the files to appear in the correct section.
  - Documents in the .zip package will need to be named as they should appear in the compliance package
- Learn more about [Generating an eCTD Compliance Package](#)



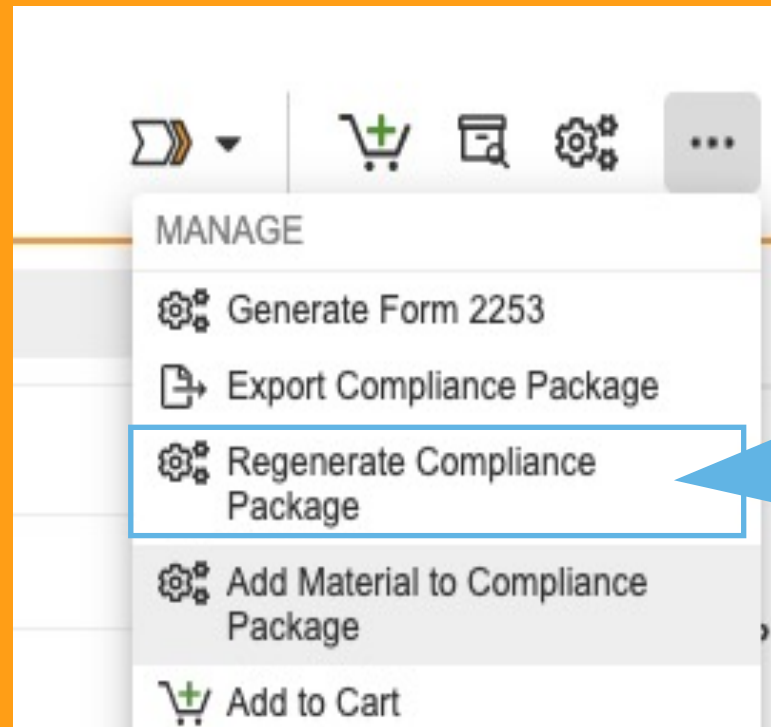
# Add Promotional Documents to eCTD Compliance Packages

## Overview

- Users can now pull additional promotional documents into an eCTD Compliance Package that has already been generated
- The system will automatically create new submission ready copies and update the 2253 form, supplementary form and correspondence letter where applicable

## Business Justification

- This will be more efficient for users when forgetting to include promotional materials upon initial submission. Users will now be able to include the promotional materials without deleting and resubmitting a binder



Selecting this User Action will allow users to include additional Promotional Documents and regenerate the Compliance Package

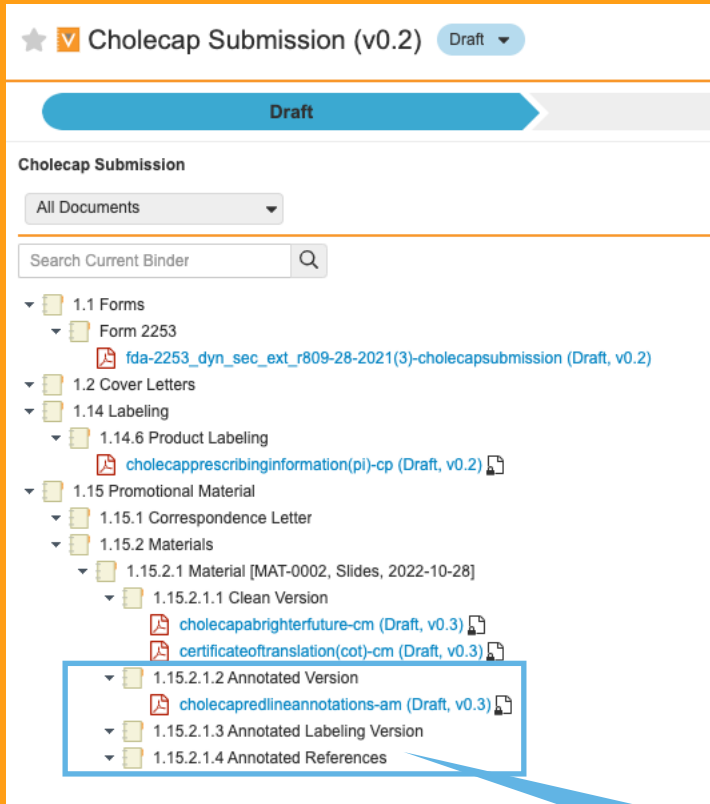


# Add Promotional Documents to eCTD Compliance Packages

- Details
  - This action updates PDF Links, updates the 2253 form and correspondence letter when applicable, and brings in the latest version of promotional documents via a user action
  - Prior to this release, if a user forgot to include a promotional document, they must delete the first binder and generate a new one. This will provide additional flexibility for all PromoMats customers using eCTD functionality
- Considerations
  - Admins must configure a User Action on the Submission Ready Lifecycle in order to trigger a regeneration of the binder
  - Admin > Configuration > Document Lifecycles > Submission Ready Lifecycle > Select any state > Create a new user action > From picklist, select “Regenerate eCTD Compliance Package” > Save
- Learn more about [Adding Promotional Documents to eCTD Compliance Packages](#)



# Add Supporting Documents to eCTD Compliance Packages



Include supporting documents when generating a compliance package via new document types

## Overview

- Include externally-created supporting documents when generating an eCTD Compliance package and make PDF links optional for Pre Clearance packages
- This feature will allow end users to include additional information in Pre-Clearance and Post-Marketing compliance packages

## Business Justification

- This feature automates clicks that users were taking to add or remove documents from the eCTD package. This automation will be a valuable time-saver for all customers, and especially those who submit multiple documents at once



# Add Supporting Documents to eCTD Compliance Packages



- Details

- Prior to this feature, when a user invokes a bulk action to add any number of documents to an eCTD compliance package, the system treated all documents as promotional materials and creates a clean version of each document
- Submission ready copies of Supporting Documents are added to an eCTD package when they are both: classified as one of the provided document types and related to a promotional material used to create the compliance package

- Considerations

- Supporting documents must be one of the new standard Supporting Documents document subtypes and must be linked to the promotional material through the new document relationship eCTD Support Documents
- Add new document type ‘Supporting Documents’ with the following subtypes:
  - eCTD Compliance Annotated Material
  - eCTD Compliance Annotated Label
  - eCTD Compliance Annotated Reference
  - eCTD Compliance Clean Material
- Clients with custom solutions and document types will not be able to leverage those solutions and must configure the document types as above to add supporting documents successfully

- Learn more about [Addition of Supporting Documents to eCTD Compliance Packages](#)



# Multi-Product and Multi-Country Support for Content Modules



Content Modules

★ Content Module: CM-000001 Approved

**Details**

Countries (5)  
Products (1)  
Content Module Claims (2)  
Content Module Document Assets (1)  
Content Module Text Elements (5)  
Content Module Rulesets (4)  
System Details  
Workflow Timeline  
Documents (2)

**Details**

**Name** CM-000001

**Primary Country** [United States](#)

**Category** Efficacy

**Description** Progression Free Survival

**Countries**

+ Add   Show in Tab

Country Name ▲	Country Abbreviation
<a href="#">Australia</a>	AU
<a href="#">Canada</a>	CA
<a href="#">Ireland</a>	IE
<a href="#">United Kingdom</a>	UK
<a href="#">United States</a>	US

## Overview

- This feature introduces the capability to relate Content Modules to multiple Products and Countries via Join Object
- Join Object Records will be created automatically when adding a Country or Product to a Content Module

## Business Justification

- End Users can now associate multiple products and countries for their claims records to assist with filtering and search, removing the need to create multiple Claims records for many countries or products



# Multi-Product and Multi-Country Support for Content Modules



- Details
  - Two new objects will be created in all PromoMats Vaults. These objects are active but security will to be added for users to create these records. These are Join Objects that connect Content Modules and Product or Country
  - Only Enhanced Suggest Links (available in 22R3) uses the additional country and product fields for matching of records. When not enabled, only the primary country and primary product on the content module record will be used for matching
- Considerations
  - Only the standard Product (product\_\_v) and Country (country\_\_v) fields are supported for multi-record joins
  - Automatic Join Record creation for Product and Country can be enabled and disabled in Admin
  - Security and permission sets will be required for users who need access to the Join Objects and new object types under annotation\_keywords\_\_sys
  - In order to relate Text assets to multiple countries and products two new related object sections will need to be added to the Content Module Detail Page Layout
  - When enabling the capability, we encourage to relabel as Primary Country/ Primary Product on the Object.
- Learn more about [Multi-Product and Multi-Country Support for Content Modules](#)





# Multi-Product and Multi-Country Support for Text Assets (Claims and Reusable Text)

★ Claim: CL-000001 Approved

**Details**

- Countries (5)
- Products (1)
- References (1)
- Match Text Variations (0)
- Where Used
- Workflow Timeline

**Match Text** Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma

**Primary Product** [Natevba](#)

**Primary Country** [United States](#)

**Source Text Asset** [CL-000072](#)

**Permalink Test** [PM-000003](#)

**Sharing Settings**

▼ Countries

+ Add   Show in Tab

Country Name ▲	Country Abbreviation	Language
<a href="#">Australia</a>	AU	
<a href="#">Canada</a>	CA	
<a href="#">Ireland</a>	IE	
<a href="#">United Kingdom</a>	UK	
<a href="#">United States</a>	US	

▶ Products

## Overview

- This feature introduces the capability to relate Text Assets to multiple Products and Countries via new Join Objects
- Join Object Records will be created automatically when adding a Country or Product to a Text Asset

## Business Justification

- End Users can now associate multiple products and countries for their Text Asset records to assist with filtering and search, removing the need to create multiple Claims records for many countries or products





# Multi-Product and Multi-Country Support for Text Assets (Claims and Reusable Text)



- Details

- Two new objects will be created in all PromoMats Vaults. These objects are active but security will to be added for users to create these records. These are Join Objects that connect Text Asset and Product or Country
- Only Enhanced Suggest Links (available in 22R3) uses the additional country and product fields for matching of claims records. When not enabled, only the primary country and primary product on the claim record will be used for matching

- Considerations

- Only the standard Product (product\_\_v) and Country (country\_\_v) fields are supported for multi-record joins
- Automatic Join Record creation for Product and Country can be enabled and disabled in Admin
- Security and permission sets will be required for users who need access to the Join Objects and new object types under annotation\_keywords\_\_sys
- In order to relate Text assets to multiple countries and products two new related object sections will need to be added to the Claim Detail Page Layout (claim\_detail\_page\_layout\_\_v)

- Learn more about [Multi-Product and Multi-Country Support for Text Assets](#)





Resources

# Resources

- Contact your Customer Success Manager or Managed Services Consultant
- Email: [VaultCustomerSuccess@veeva.com](mailto:VaultCustomerSuccess@veeva.com)
- 22R3 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: <https://platform.veevavault.help/en/lr/>





Thank you



# Appendix



# Commercial Data Model Changes

- The following changes were made to PromoMats Vaults to support the **Add Supporting Documents to eCTD Compliance Packages** feature:
  - Added the inactive document type *Supporting Documents* with the following subtypes:
    - eCTD Compliance Annotated Material
    - eCTD Compliance Annotated Label
    - eCTD Compliance Annotated Reference
    - eCTD Compliance Clean Material
  - Added the inactive document field *Main Promotional Piece?*
  - Added the inactive document relationship *eCTD Support Documents* (ectd\_support\_documents\_\_v)
- The following changes were made to PromoMats and Multichannel Vaults to support the **Product & Country Become Shared Fields** feature:
  - Country (country\_\_v) document field is now a shared document field
  - Product (product\_\_v) document field is now a shared document field



# Commercial Data Model Changes

- Added the *Related ISI* (related\_isi\_\_v) relationship type to the *Base* document type
- Added the *Related PI* (related\_pi\_\_v) relationship type to the *Base* document type
- *Source Content Module* (source\_content\_module\_\_v) is now a shared document field
- Added the following fields to the *Country* (country\_\_v) object
  - *PromoMats UUID* (promomats\_uuid\_\_v)
  - *Language* (language\_\_v)
  - *Country Code* (country\_code\_\_v)
- Added the *Language* (language\_\_v) object
- Added the *Country Language* object
- Added the field (source\_text\_asset\_\_v) to the *Claims* (annotation\_keywords\_\_sys) object
-



# Commercial Data Model Changes

- The following changes will be active in PromoMats Vaults that have no *Claims* (annotation\_keywords\_\_sys) object records. If your Vault contains *Claims* records these changes can be activated and configured:
  - *Claims* (annotation\_keywords\_\_sys) object is relabeled to *Text Asset*
  - Added the *Claims* and *Reusable Text* object types to the *Text Asset* (annotation\_keywords\_\_sys) object and inactivated the Base object type
  - Added the field *Reusable Text Type* (resuable\_text\_type\_\_v) to the *Reusable Text* object type
  - Relabeled fields on the the *Text Asset* (annotation\_keyword\_category\_\_v) object as follows:
    - *Category* field relabeled to *Channel*
    - *Country* (country\_\_v) field relabeled to *Primary Country*
    - *Product* (product\_\_v) field relabeled to *Primary Product*
    - *Claim* (annotation\_keyword\_\_v) field relabeled to *Text Asset on Match Text Variation* (match\_text\_variation\_\_sys)
  - Relabeled the *Claim Targets* (annotation\_keyword\_targets\_\_sys) object to *Text Asset Targets*
  - Relabeled *Claims Object Lifecycle* to *Text Asset Lifecycle*
  - Relabeled *Claims* (related\_claims\_\_v) document field to *Text Assets*
  - Relabeled Document Field Layout Section *Claims* to *Text Assets*





# Commercial Data Model Changes

- The following changes will be active in PromoMats Vaults that have no *Content Module* (content\_module\_\_v) object records. If your Vault contains *Content Module* records these changes can be activated, inactivated, and configured:
  - Relabeled fields on the *Content Module* (content\_module\_\_v) object as follows:
    - *Category* (category\_\_v) field relabeled to *Channel*
    - *Country* (country\_\_v) field relabeled to *Primary Country*
    - *Product* (product\_\_v) field relabeled to *Primary Product*
  - Inactivated the *Text Element Content* (text\_element\_content\_\_v) field on the *Content Module Asset* object
  - Inactivated the *Text Element Type* (text\_element\_type\_\_v) field on the *Content Module Asset* object
  - Relabeled the *Claim* (claim\_\_v) field on the *Content Module Asset* object to *Text Asset*
  - Relabeled the *Claim Match Text* (claim\_match\_text\_\_v) field on the *Content Module Asset* object to *Match Text*
  - Added the *Reusable Text Type* (reusable\_text\_type\_\_v) field to the *Content Module Asset* object
  - Added the *Text Asset*, *Match Text*, and *Reusable Text Type* object fields to the *Text* (text\_\_v) object type on the *Content Module Asset* object and its Page Layout
  - Added Criteria VQL to the *Text Asset* object field on the *Claim* object type:
    - object\_type\_\_vr.name\_\_v = 'Claim' OR object\_type\_\_vr.name\_\_v = 'Base'
  - Added Criteria VQL to the *Text Asset* object field on the *Text* object type:
    - object\_type\_\_vr.name\_\_v = 'Reusable Text'





# Platform Data Model Changes

- Added the *Ad Hoc Sections Allowed* (ad\_hoc\_sections\_allowed\_\_sys) system field.
- Added the *Outbound Email Status* (outbound\_email\_status\_\_sys) field to the *Person* (person\_\_sys) object to support the **Outbound Email Address for Persons** feature
- Added the following objects to support the **Glossary Terms** feature:
  - *Definition* (glossary\_definition\_\_sys)
  - *Glossary Event* (glossary\_event\_\_sys)
  
- Learn more [About the 22R3 Release](#)





# Configuration Management: Review & Deploy Page Notification for Pending Component Updates

## Overview

- This feature adds a new warning message alerting users of pending configuration changes during the Review & Deploy process

## Business Justification

- When Vault displays this message, it means that configuration changes are happening asynchronously, and users should allow the changes to complete prior to continuing the deployment

Inbound Packages > PKG-0111-5 >

### Review and Select Steps (Step 1)

⚠ Component configuration updates for this Vault are being processed. Deployment status for this package may not reflect the latest component updates. [Learn more](#)

Filter

Show blocked status

Reorder

8 of 8 steps selected

<input checked="" type="checkbox"/>	Step ▲	Step Type	Label	Name	Type	Deployment Status	Deployment Action
<input checked="" type="checkbox"/>	00010	Component	TestObject	testobject__c	Object	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00020	Component	User Role Setup	user_role_setup__v	Object	Verified	Update (Different in target Vault)
<input checked="" type="checkbox"/>	00030	Component	TestLifecycle	testlifecycle1_lifecycle__c	Objectlifecycle	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00040	Component	TestSharingRule	testsharingrule__c	Sharingrule	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00050	Component	User Setup Role Editors	user_setup_role_editors__c	Sharingrule	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00060	Component	matchingrule1	matchingrule1__c	Matchingrule	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00070	Component	TestObject Detail Page Layout	testobject_detail_page_layout__c	PageLayout	Verified	Add (missing in Vault)
<input checked="" type="checkbox"/>	00080	Component	User Role Setup Detail Page Layout	user_role_setup_detail_page_layout__c	PageLayout	Verified	Update (Different in target Vault)



# User Mention Notifications Only Sent for New User Mentions



## Overview

- As part of the Notifications on Replies to Notes feature in 22R1, we made a change to the conditions under which User Mention notifications are sent
- Vault no longer sends User Mention notifications when a user edits an existing Note or Reply with an existing User Mention. Vault only sends User Mention notifications when a User Mention is added to a new or existing Note



# Admin Tabs & Business Admin Tabs Updates

- With the introduction of the Tab Collections feature in the upcoming 23R1 release, the Business Admin tab will be separated from the other Admin tabs as its own tab collection
  - Users who have permission to view Admin and Business Admin tabs will now access them from a new Tab Collection icon
  - Vault will no longer display the existing cog icon for viewing Admin tabs
  - These enhancements will provide a better user experience for managing data in Business Admin and offer a more consistent feel in viewing different tab collections
- 
- Learn more about [Admin Tabs & Business Admin Tabs](#)



# Improved Error Handling for Signature Page Generation



## Overview

- With this release, Vault will validate the template layout of Advanced Templates upon downloading a signature page to ensure all signatures can be manifested. Templates configured with a maximum row count on the signature blocks that exceeds the number of expected signatures will trigger an error prompting an Admin to address the issue