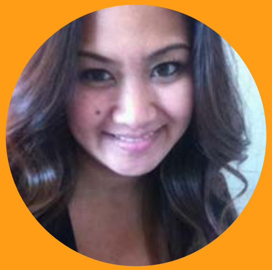
21R1 PromoMats Vault Release Deep Dive

March 2021



Janice Ruiz

Manager, Commercial Content
Customer Success NA

Maria Ruoto

Senior Customer Success Manager, NA

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

21R1 Key Dates

Dates	Event
March 22	(all PODs) Pre-release vaults available
March 22 – 26	Validation package available on VeevaDocs **March 22**: System Release Memo **March 23**: Compliance Documents **March 26**: Executed OQs
March 30	**EU PromoMats Q&A Session** https://veeva.zoom.us/webinar/register/WN_Pt-LFLjZTmKPaLoM_DQ89w **NA PromoMats Q&A Session** https://veeva.zoom.us/webinar/register/WN_PEiPpbeiQo2UOPCtG_BaMw
March 31	**Global MedComms Q&A Session** https://veeva.zoom.us/webinar/register/WN_wrqCa8ZhQhCfh73TfcoM_Q
April 8	**Developer Release** https://veeva.zoom.us/webinar/register/WN_D4x95U_lRYS4kLGb7dqeoQ
April 9	Release to all limited release PODs and PODs VV1-2, VV1-1055, VV1-1065, VV1-1088, VV1-1121 *Vault File Manager does not release at this time, and instead releases with the general release PODs*
April 16	Release to all general release PODs

Announcements

Veeva COMMERCIAL & MEDICAL

SUMMIT CONNECT

NORTH AMERICA

June 10, 2021

A single day event that will connect you with the people and ideas you care about most.

Every hour the agenda alternates between large group sessions and small interactive discussions.

Save the date

EASTERN TIME	MEETING TYPE	PACIFIC TIME
11:00a	Keynote	8:00a
12:00p	Connect	9:00a
1:00p	Sessions	10:00a
2:00p	Connect	11:00a
3:00p	Sessions	12:00p
4:00p	Connect	1:00p
5:00p	Sessions	2:00p
6:00p	Close	3:00p
7:00p	Fun!	4:00p

Find Out What's Next

Small Group Discussions

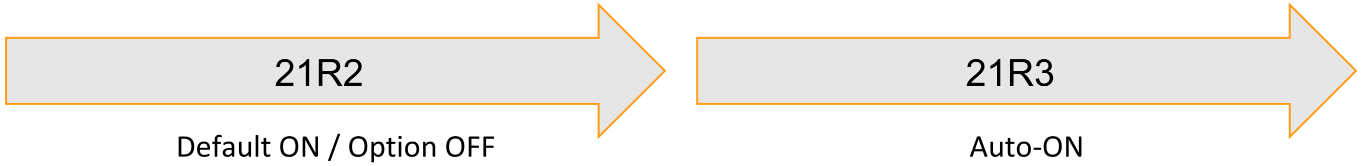
Large Group Sessions

Families Invited

21R2: Looking Ahead

Vault User Interface Enhancements

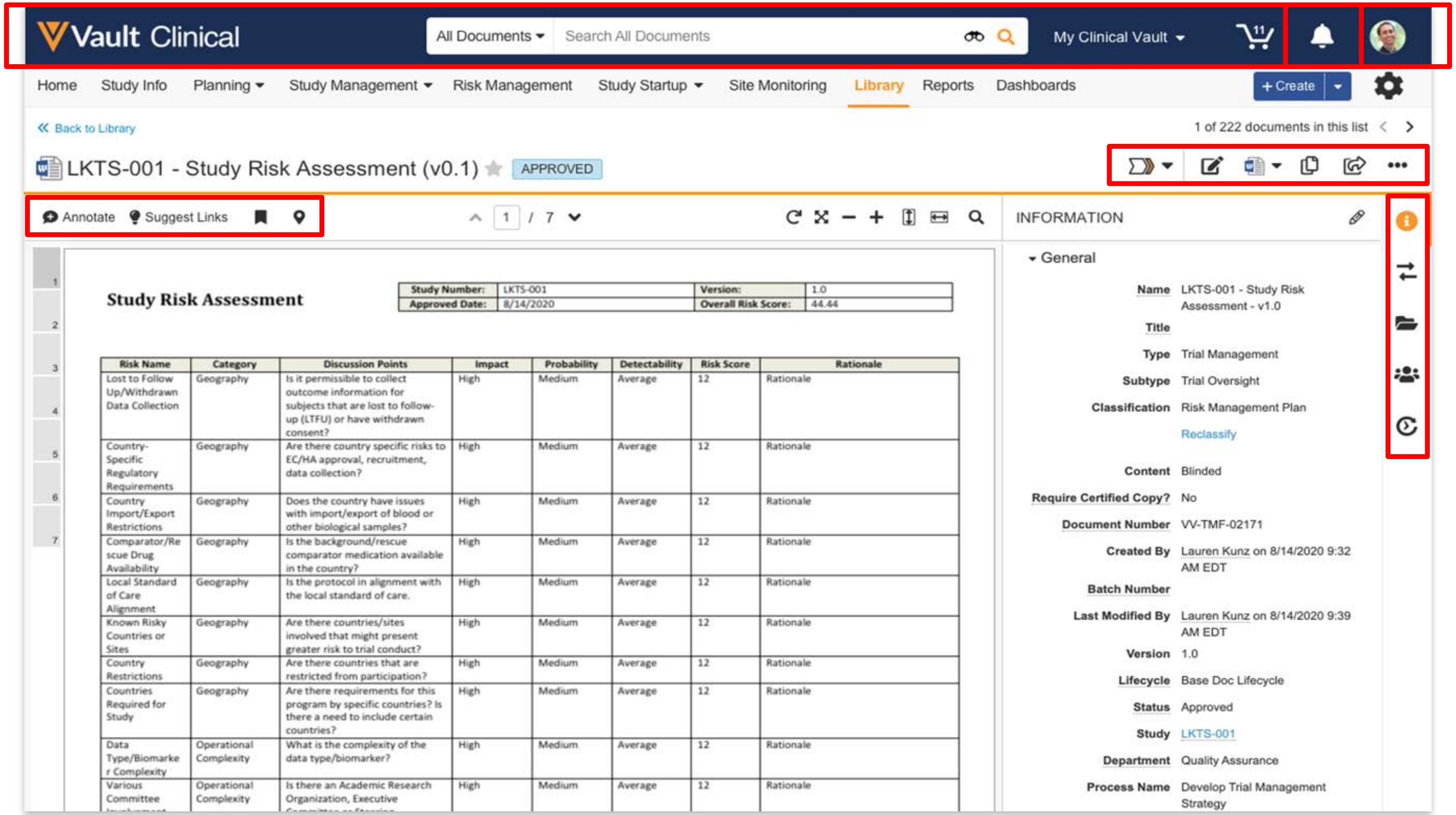
- Pre-announcing several exciting planned features to enhance usability with an updated look and feel
  - **Vault UI Styling** - modern look and feel
  - **Action Bar** - easily access frequently used actions on a record or document
  - **Doc Info Page Enhancements** - improved usability in managing document and annotation
  - **Notification Badge** - view notifications from anywhere in Vault
  - **Action Menu Button Change** - update to a more intuitive icon
- These enhancements are planned as **Auto-on** immediately with the 21R2 upgrade
  - Customers may choose to turn OFF the UI changes after **21R2 (August 2021)** in order to prepare training materials
  - Changes become permanent, auto-ON, for all vaults with **21R3 (December 2021)**



IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

Vault User Interface Enhancements

Initial Design – Subject to Change



IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

21R2: Office Online Support

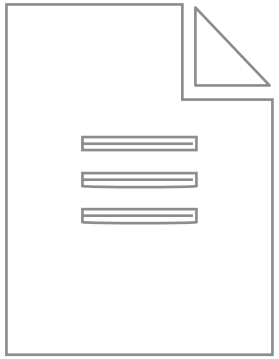
21R2 Office Online Support stops

Collaborative Authoring replaces Office Online

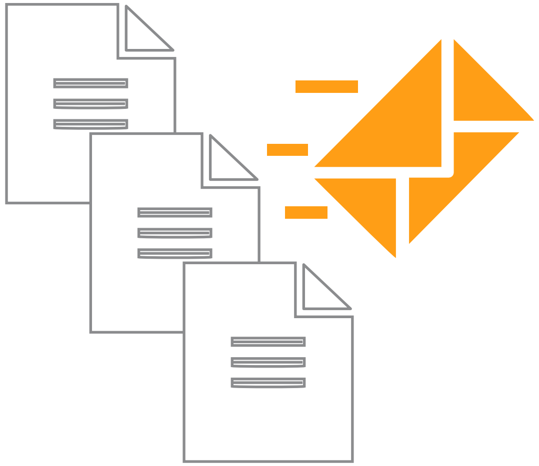
Users can check back in until 21R3

Moving to One Workflow

Moving to One Workflow



Document Workflow



Envelope/MDW

Object Workflow

2021 Timeline

Important Disclosure: The following outlines Veeva's current product direction. These plans may change as we learn more

21R1

- New template workflows for Component and Reference documents available for optional use

- You can still edit legacy workflows
- You can still create and copy legacy workflows

21R2

- Old workflow tab renamed "Legacy Workflow"
- MDW workflow renamed 'Document Workflow'
- New template workflows for Material documents available for optional use

- You can still edit legacy workflows
- You can still create and copy legacy workflows

21R3

- One Workflow tab to create Workflows
- No Create or Copy for Legacy Workflows

- You can still edit legacy workflows

Projects in-flight to think about building workflows in One Workflow

eCTD Compliance Package Generation

New eCTD Requirements

By June 2021, organizations must submit **electronically** to the FDA for the following submissions:

- Post Marketing submissions of promotional materials using Form FDA 2253
- Pre Clearance of promotional materials for accelerated approval products

To assist customers in adhering to the final guidance Veeva has released an enhanced eCTD Compliance Package for Vault PromoMats in the 20R3 release.

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: Generate Correspondence Letter

- Overview
  - This feature adds the ability to automatically create a Correspondence Letter when generating a Pre-Clearance Compliance Package in vaults with eCTD Compliance Package Generation enabled
  - The Correspondence Letter contains information that must be submitted to the FDA, preventing users from manually creating the letter
- Considerations
  - You can create multiple Correspondence Letter templates, allowing users to select the applicable letter when generating the Pre-Clearance Compliance Package
- Learn more about eCTD Compliance Packages

Peter Gassner
Office of Prescription Drug Promotion
Food and Drug Administration
5901-B Ammendale Road
Beltsville, MD, 20705-1266

Subject: Presubmission Accelerated Non-launch for NDA 123456 Cholecap Fibrastatin Niasolutane Capsules 20 mg

Dear Peter Gassner,

Pursuant to section 506(c)(2)(B) of the FD&C Act, 21 CFR 314.550 enclosed please find the presubmission of Professional Presubmission Accelerated Non-launch, Non-Core promotional materials for NDA 123456 Cholecap Fibrastatin Niasolutane Capsules Reduces Cholesterol.

Material Type	Material ID	Material Description	Product
www-website	VP--00003	veeva.compromomats-cm	Cholecap

This submission includes the following for each promotional material identified above:

- Clean Version(s) of each draft promotional material(s)
- Annotated Version(s) of each draft promotional material(s)
- The current FDA Approved PI and/or Medication Guide for Cholecap
- Annotated reference(s) to support product claim(s) for each promotional material(s)

Should you have questions or require additional information regarding this submission please contact Janice Ruiz at 5551234578 or via email at reg@test.com.

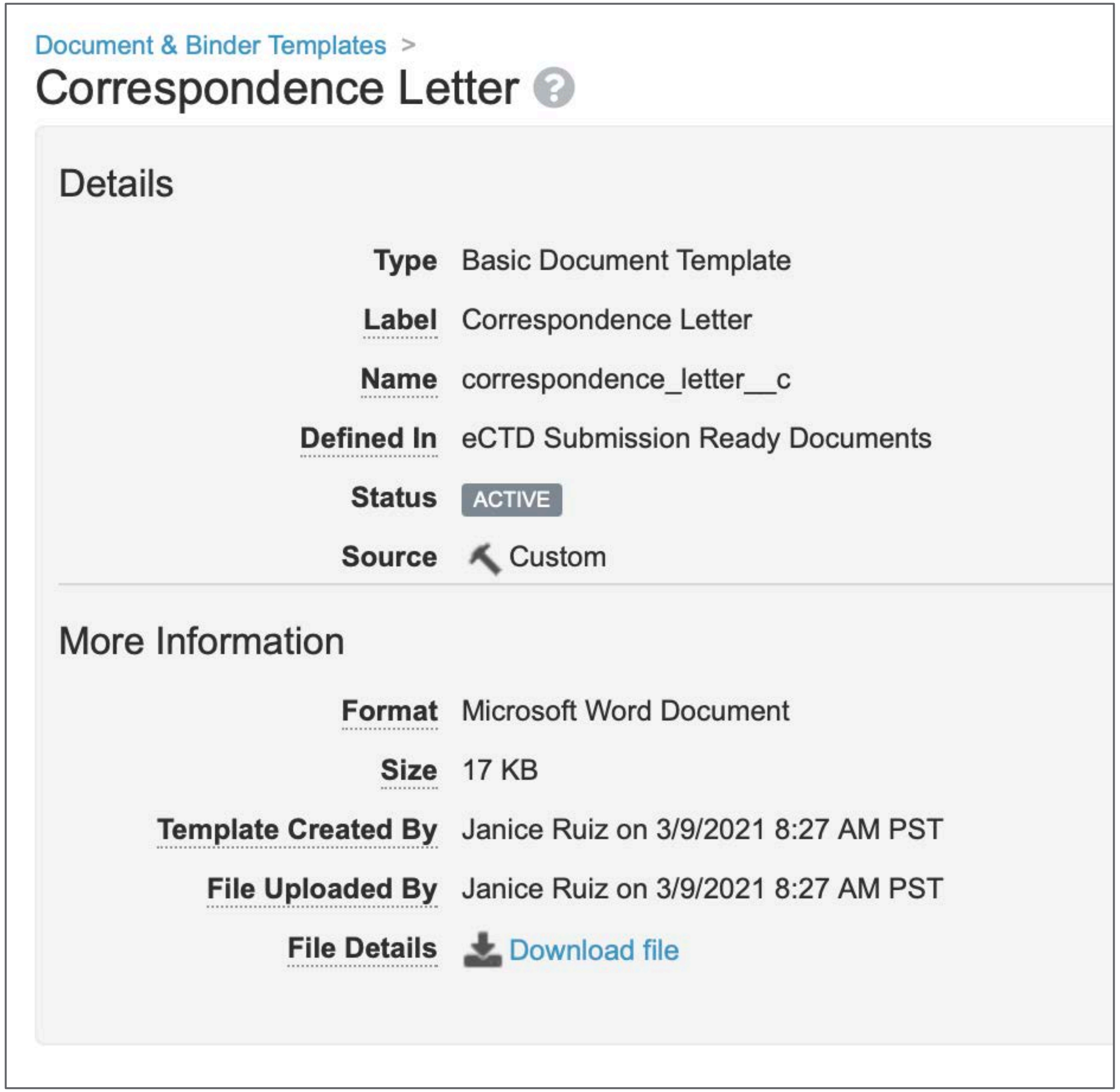
Regards,

Janice Ruiz

This submission is virus free as checked by Norton 360 version 3.60 created by Norton.

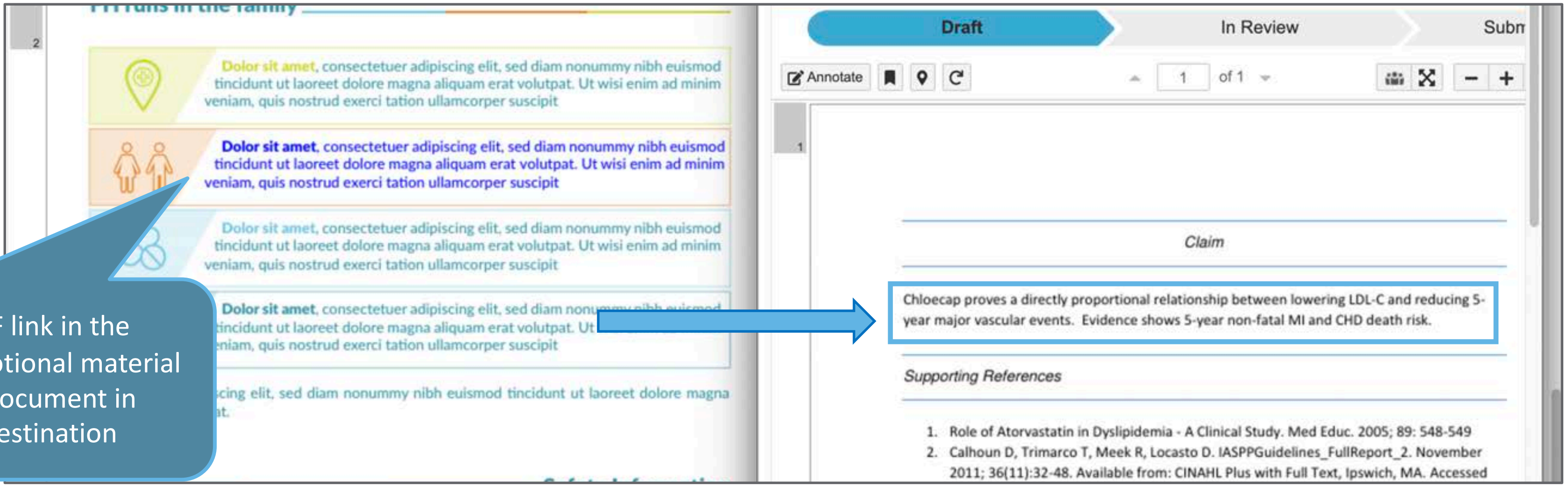
eCTD Compliance Package: Generate Correspondence Letter

- Configuration
  - Download the [Correspondence Letter template]
  - Update the document template with your company's information
    - Note that you need to ensure the Promotional Material Information document field is not hidden on the Correspondence Letter. Hiding this document field prevents Vault from populating the Material Type, Material ID, and Material Description and Product fields on the Correspondence Letter
  - In Vault, navigate to Business Admin > Documents & Binder > eCTD Submission Ready Documents
  - Click Create and select Document Template
  - Select the Basic Document Template type
  - Enter a Correspondence Letter label
  - Click Upload File and select the Correspondence Letter template
  - Click Save



eCTD Compliance Package: Relative PDF Links Work in PromoMats

- Overview
  - Relative PDF links within compliance packages can now be opened in PromoMats
    - Users no longer need to export the compliance package to open the links
- Considerations
  - The reference or PI document will open in a pop-up viewer when the Relative PDF link is clicked
  - You must have the new (20R3) eCTD Compliance Package generation configured and clicked ‘Yes’ to include Linked References
  - Relative PDF links can still be opened after exporting the compliance package
- Use Case
  - Users may want to test the Relative PDF link destinations prior to exporting the package



Clicking on the Relative PDF link in the annotated version of the promotional material will open the reference/PI document in PromoMats to the exact destination

Auto-Claims Linking

Auto Claims Linking: Prevent Duplicate Records

- Overview
  - This enhancement prevents users from saving new or updated *Claim* record if it is an exact duplicate of an existing record
  - Duplicate is defined as a Claim record with the same Match Text and the same matching fields
    - For example: the same Product, Country, and Match Text
  - On detection of a duplicate, an error is displayed, and you are not able to save the Claim Record

Auto Claims Linking: Prevent Duplicate Records

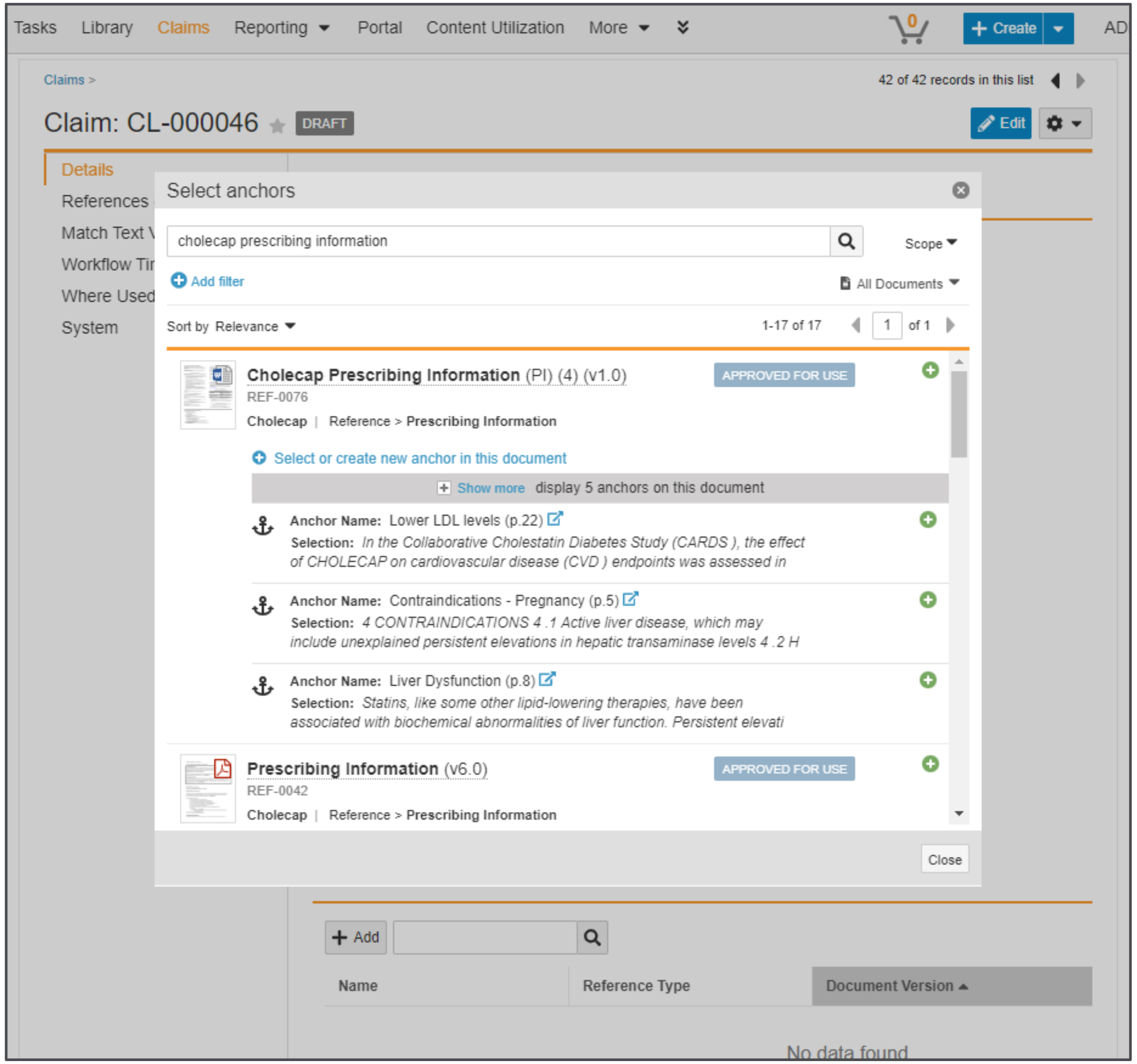
- Considerations
  - Wildcards are treated as plain text during validation
    - “Trust Cholecap” and “Trust Chole[*]” are not duplicates
    - “Trust Cholecap®” and “Trust Cholecap” are not duplicates
  - Excluded characters, trailing periods, and exclamation marks are ignored by duplicate detection
    - “Trust Cholecap®” and “Trust Cholecap” are duplicates
    - “Trust Cholecap.” and “Trust Cholecap” are duplicates
    - “Trust Cholecap!” and “Trust Cholecap” are duplicates
  - Blank fields are not considered a match for duplicate validation
  - References, non-matching fields and match text variations are ignored for duplication checks
  - Validation is enforced when Claim record is created through:

User Interface	API	Bulk Action	Vault Loader	Copying an existing Record

- Use Case
  - Many customers are beginning to use Claims globally and are either copying Claims or creating Claims from existing Promotional Materials with “Get Link Annotation Data”. This increases the chances of duplicate Claims being created

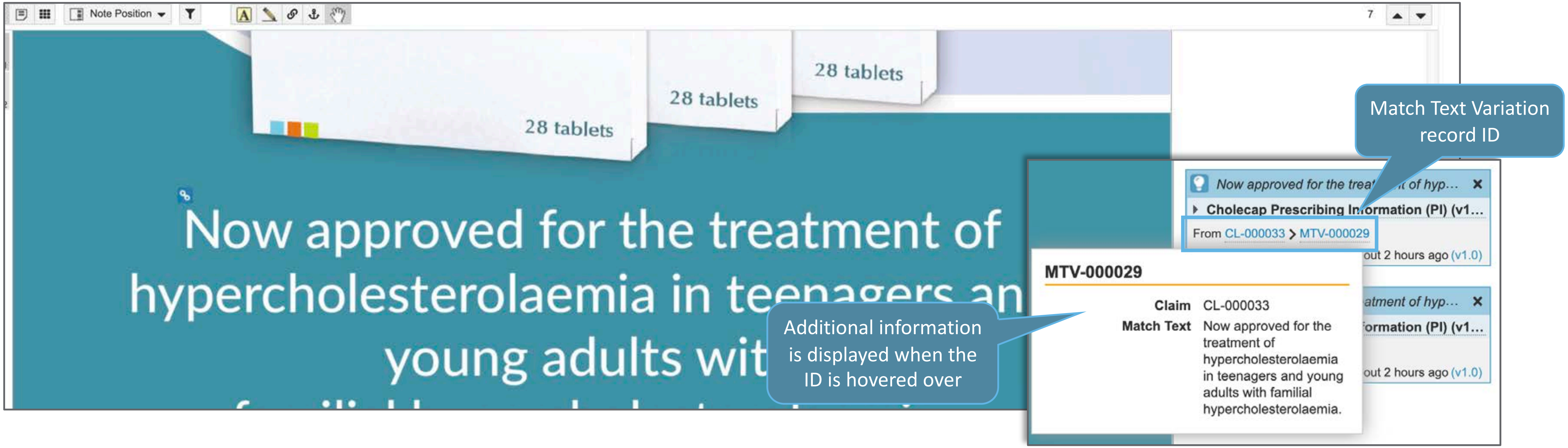
Auto Claims Linking:
Preview & Create Anchor from Claims

- Overview
  - Users can create new anchors within existing reference documents, which streamlines Claim record creation
  - Aligns creation of Claims to manual Referencing experience
  - Permissions
    - User requires View Content permission on target Reference document
    - User requires Create Anchor permission
      - Users without Create Anchor can select existing Anchors
- Considerations
  - Creation of anchor takes place in a mini-browser window



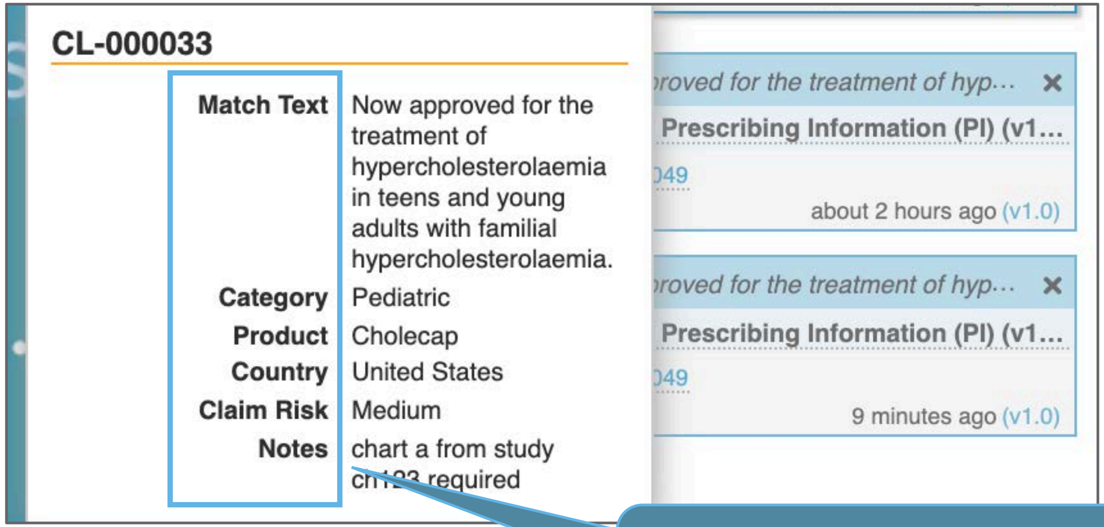
Auto Claims Linking: Display Match Text Variation in Info Card

- Overview
  - When a Match Text Variation is used to match a Claim record to a document, Vault will now display the Match Text Variation record ID alongside of the parent Claim ID in the footer of Suggested, Approved, and Auto Link annotation info cards
- Considerations
  - Additional information about the Match Text Variation can be viewed by hovering over the ID or by clicking the ID to open the record detail page in a mini-browser window

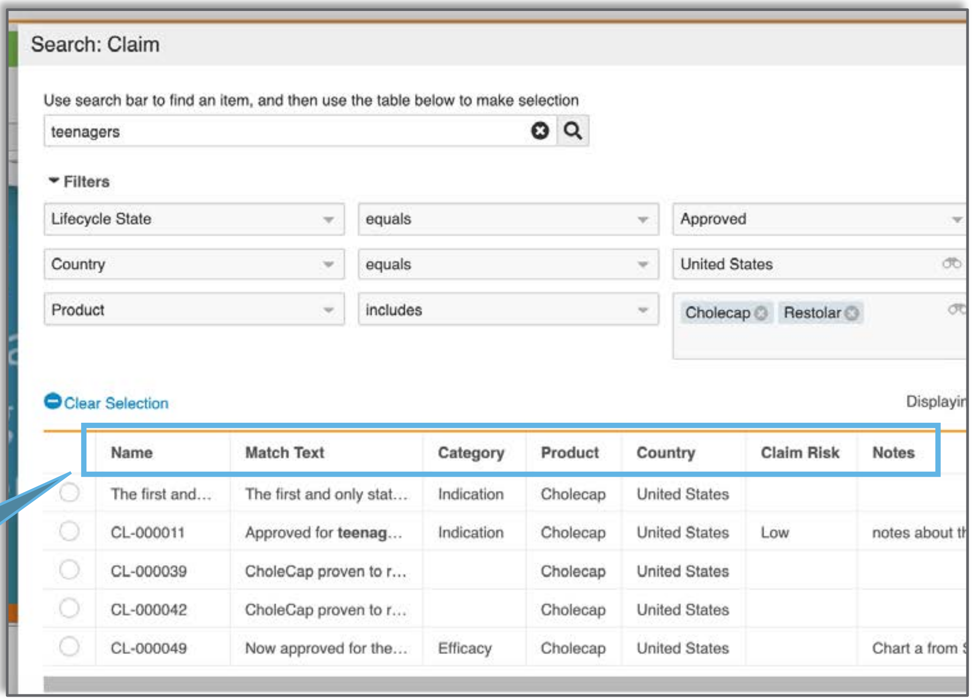


Auto Claims Linking: Configurable Columns in Select Claims Dialog

- Overview
  - Any Claim object field configured to appear in the Claim hovercard will now also be displayed as a column in the Select Claim dialog that opens when users are selecting records to manually create Claim Links on documents
- Considerations
  - To configure fields to appear in the Claim hovercard, Admins need to check the ’Display in default lists and hovercards’ on the Claim or Match Text Variation Object field



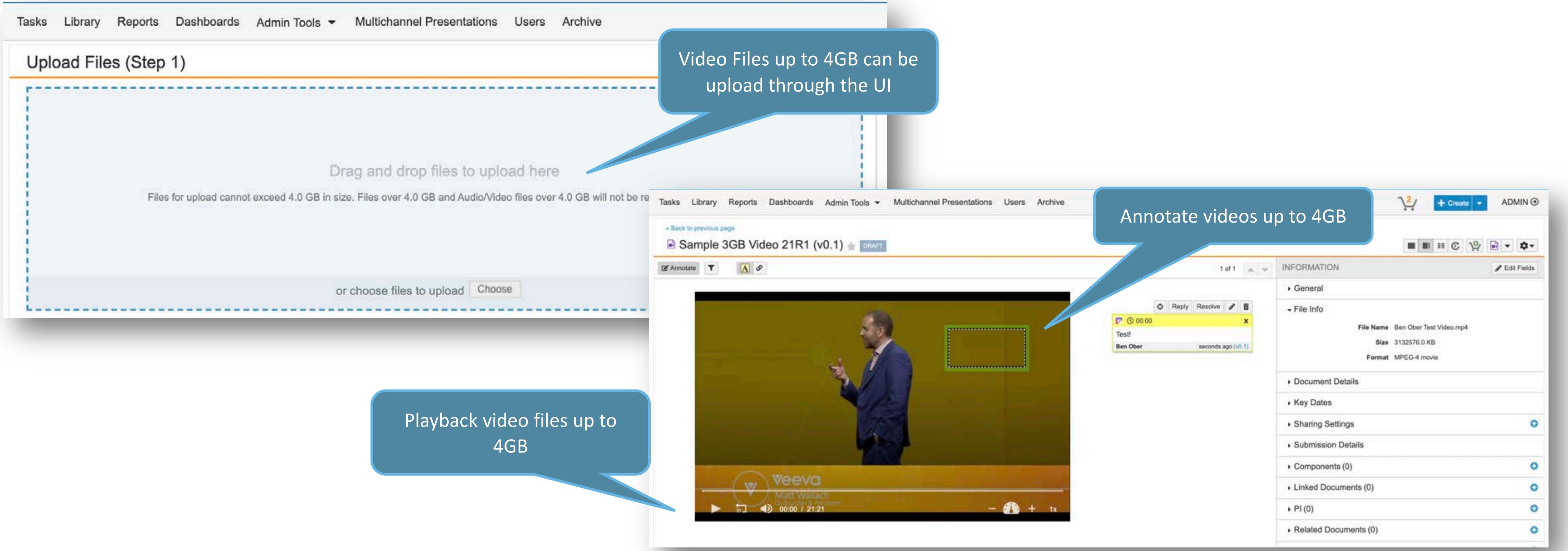
Fields that appear in the hovercard will now also appear in the Search Claim dialog



Auto-On:
Digital Asset Management

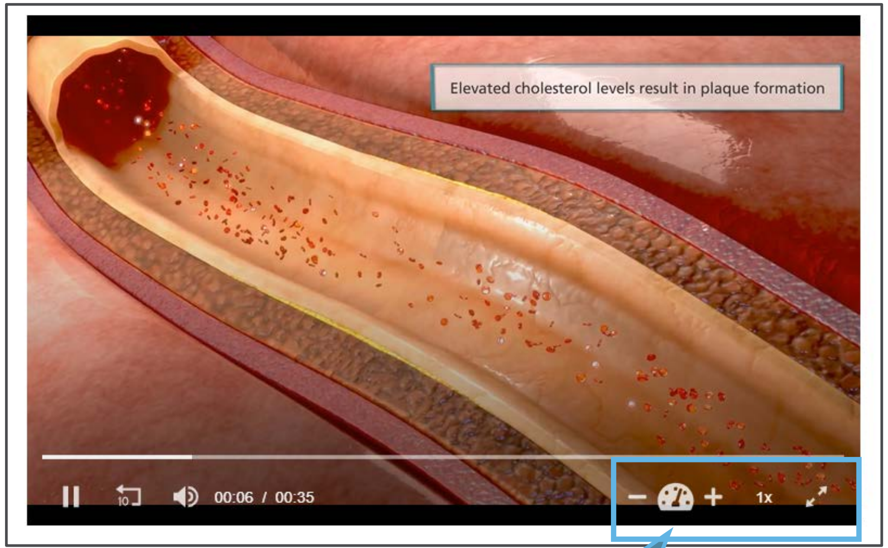
Increase to Maximum Source File Size for Videos

- Overview
  - The maximum source file size for video files has been increased to 4GB from the previous 2GB limit for video source files
  - Video files up to 4GB will also be rendered, allowing for review and annotation in Vault



Video Playback Speed Controller

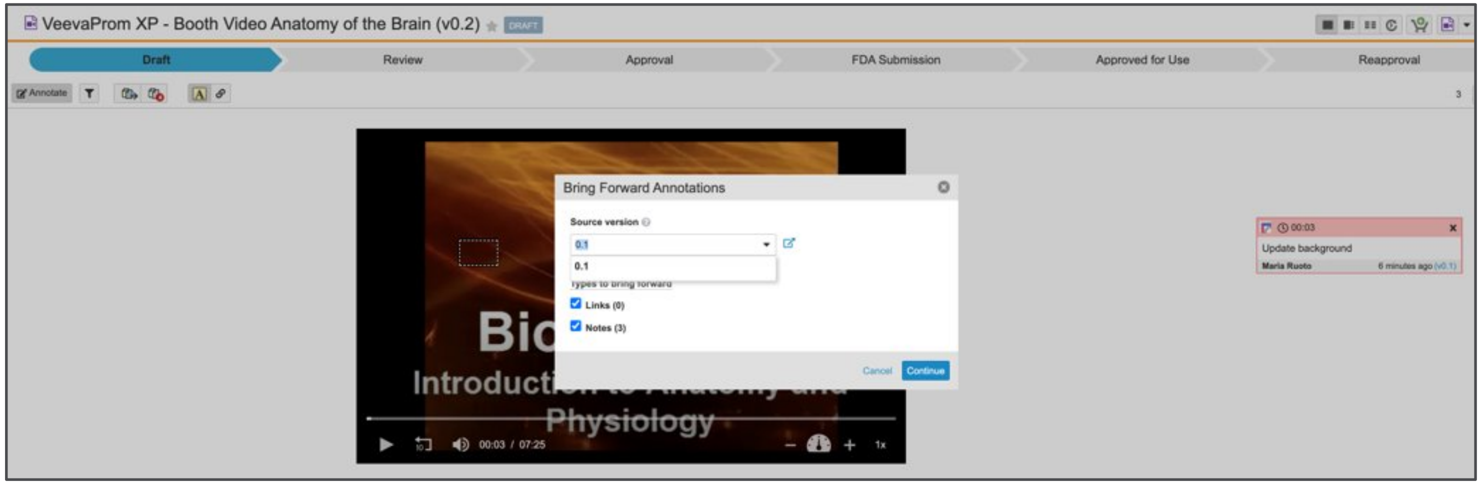
- Overview
  - Users can now modify the playback speed of videos by clicking the (+) icon to speed up by one increment, or the (-) icon to slow down by one increment, within a set of defined increments
  - Vault displays the current playback speed next to the speedometer icon in the control bar
  - The defined speeds include:
    - 0.25x
    - 0.5x
    - 0.75x
    - 1x (default)
    - 1.25x
    - 1.5x
    - 2x
- Considerations
  - Modified speed is not automatically applied on the next video
  - This is also applicable to viewing video files in Portal
  - Speed control does not apply for audio files
  - Speed control is not supported for Android devices
  - Only for videos that render within Vault for video annotation



Use the (+) & (-) icons to speed up or slow down the video playback speed

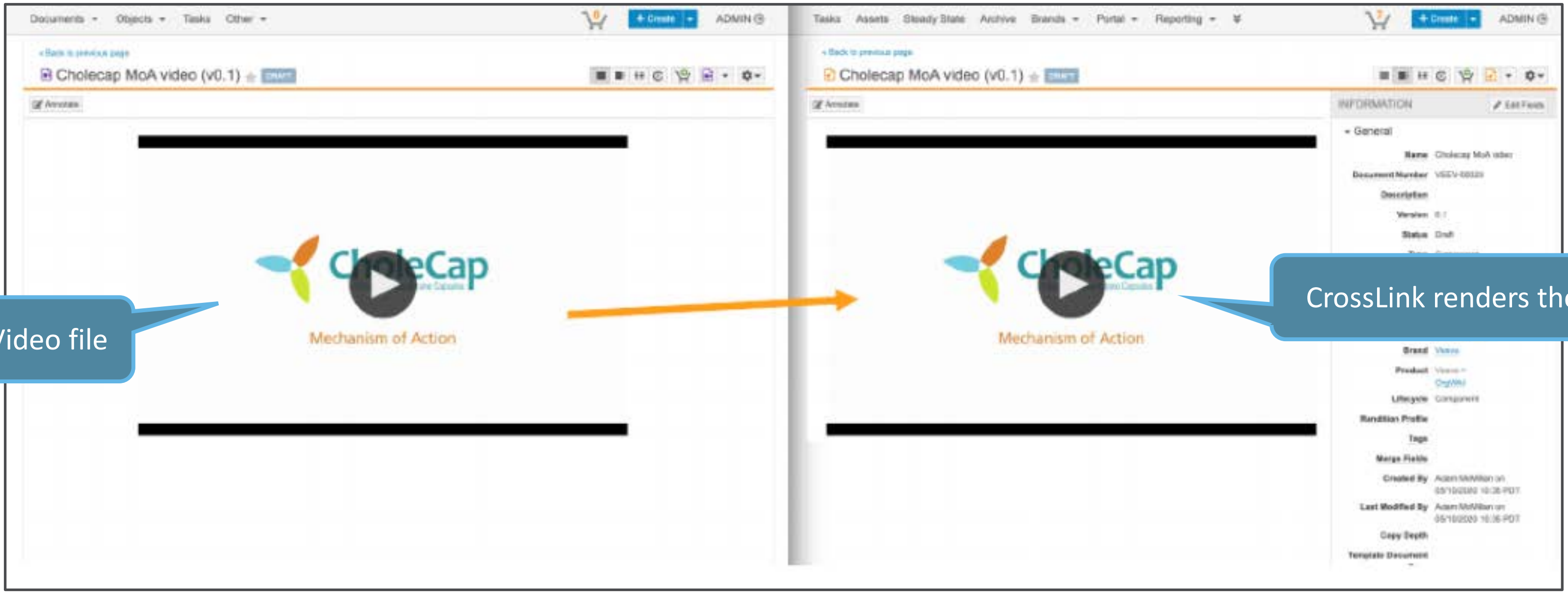
Video Review: Bring Forward Annotations

- Overview
  - With this release, users can bring forward annotations on video documents
  - Users can also enter Move mode to edit the time signature of annotations
- Considerations
  - All supported annotation types can be brought forward (notes and links)
  - Placement based on coordinates and timestamp only
  - If timestamp doesn't exist, the annotation is placed at 00:00 with "alert" icon
  - Annotations between video and non-video renditions, such as storyboards, cannot be brought forward
- Learn more about [Annotating Videos]



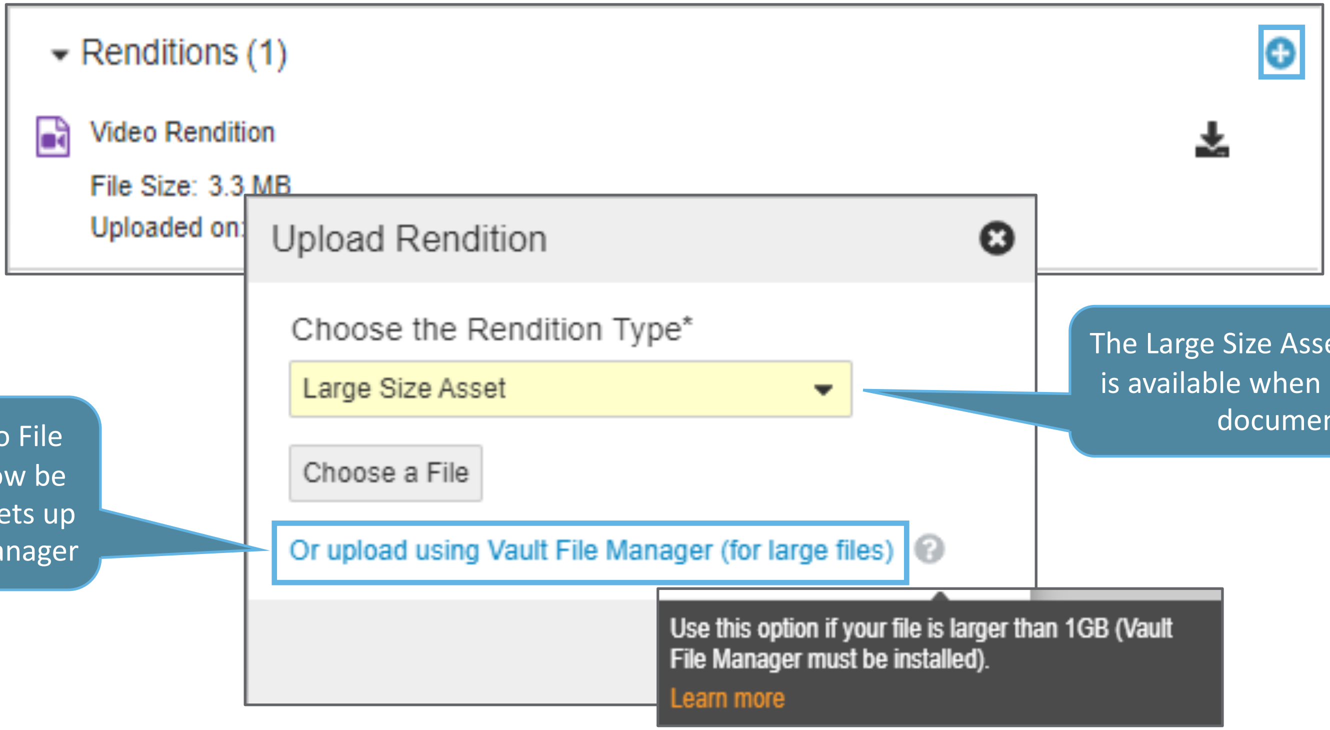
Audio & Video Renditions for CrossLinks

- Overview
  - In 21R1, CrossLinks that point to Audio or Video Documents in other Vaults will now pull through those renditions, allowing users to easily review CrossLinks where the source document is an audio or video file
- Considerations
  - You can annotate Video Documents if binding rule is set to Specific Document Version
  - You can not annotate Audio Documents



Upload Large Size Asset Renditions using Vault File Manager

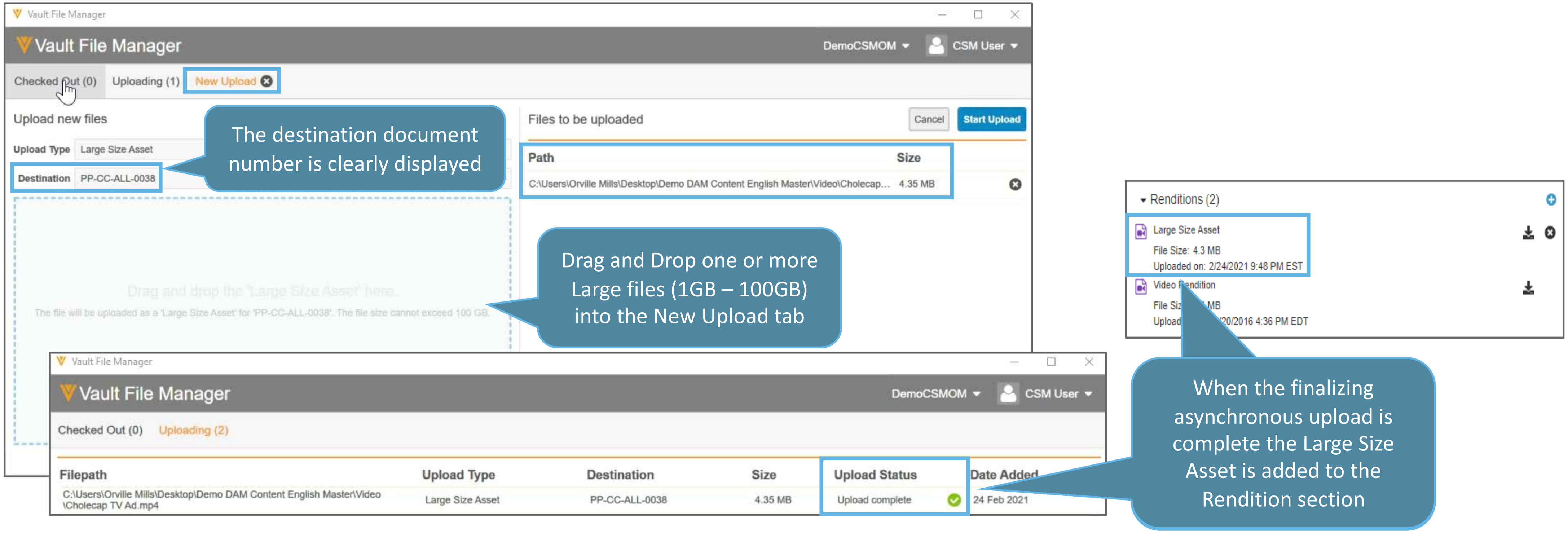
- Overview
  - The UI for the Add Rendition modal in Vault has been updated so that you can now select the Large Size Asset rendition type and upload files between 1GB – 100GB using Vault File Manager



Users with the Check Out to File Manager permission will now be able to upload large size assets up to 100GB using Vault File Manager

The Large Size Asset rendition type is available when included on the document type

Upload Large Size Asset Renditions using Vault File Manager

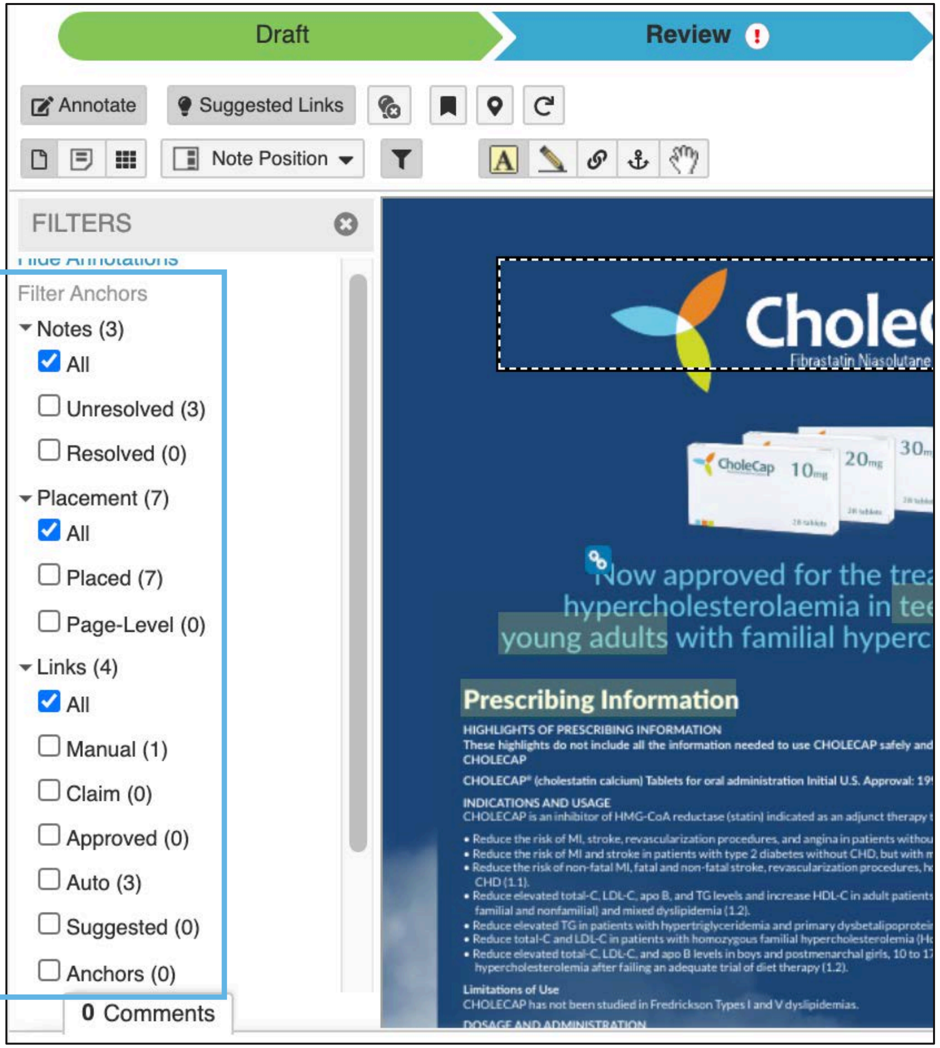


- Considerations:
  - Vault File Manager is only available on Windows OS
- Use Case
  - Organizations no longer need to use the ”FTP Inbox” functionality or the FTP Client to upload large size assets like high resolution videos. End users can easily upload files larger than 1GB and up to 100GB into Vault

Auto-On: Working with Documents

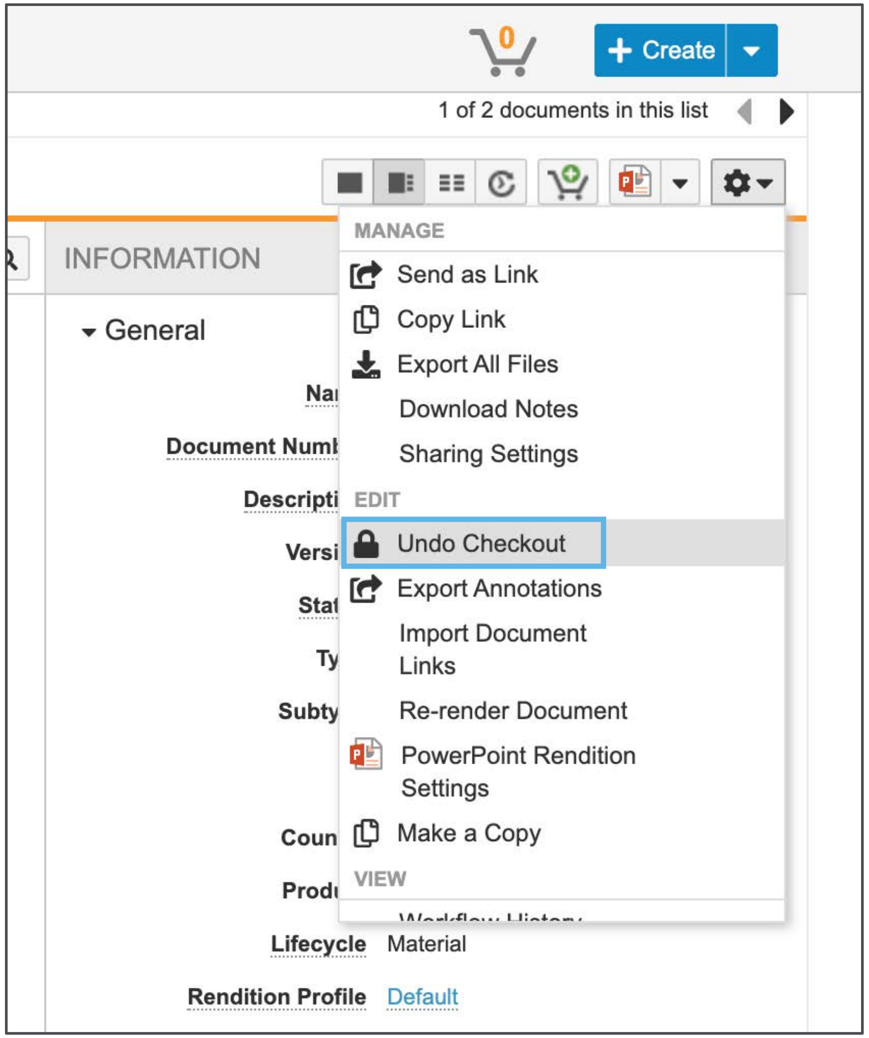
Annotate Filters: Enhancements

- Overview
  - Moves filters to sidebar
  - Adds Author and Tag (multi-select)
  - Reorganizes and relabels some filters
  - Enhances filter useability by providing more options
  - Enhances value of annotation tagging
- Considerations
  - In-use sections are expanded dynamically
  - Most settings saved as user preference except for Author and Tag
  - My Annotations / Other Annotations replaced by Author
  - Reply Authors not included in Author list
  - Cannot simultaneously view Filters, Bookmarks, Destinations (use same sidebar)
  - More Link filters when Auto Claims Linking enabled (Suggested, Approved, Auto, Claim)



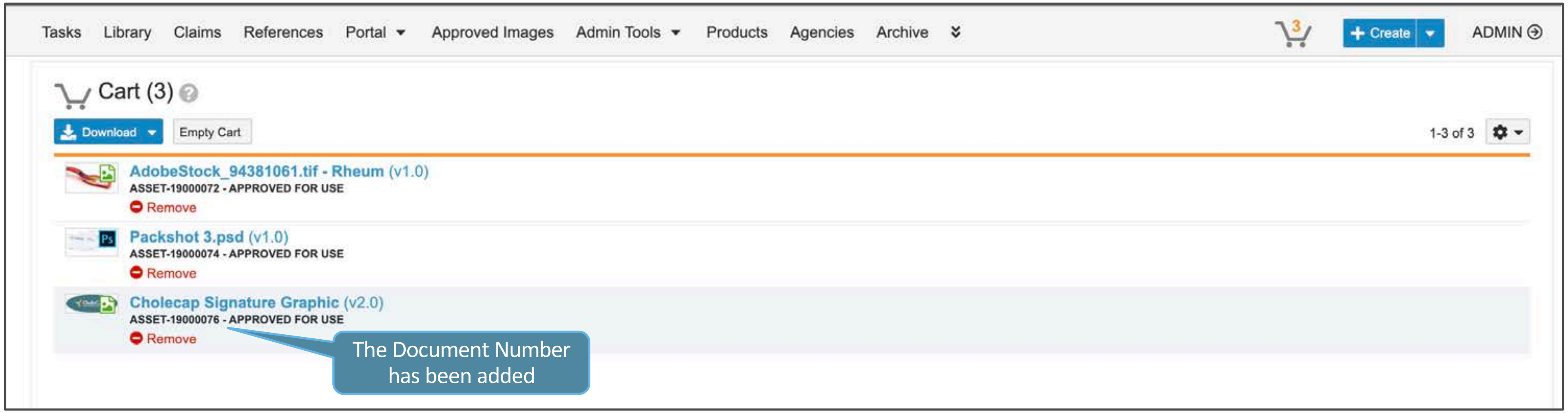
Document Owner Can Undo Checkout for All Checkout Types

- Overview
  - Document Owners are now able to undo checkout sessions on any document where the Owner role has Edit Document state and role permission
- Considerations
  - The Owner must have a document role with the Edit Document permission on the checked-out document
- Use Case
  - The Owner of a document needs to route their document while another user has it checked out



Show Document Number in Cart

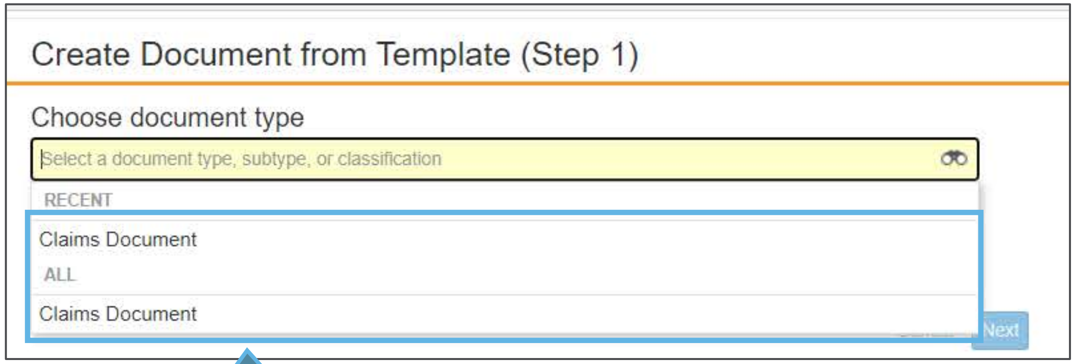
- Overview
  - Vault will now display the document number for each document in your Cart, which helps to differentiate between documents with similar names



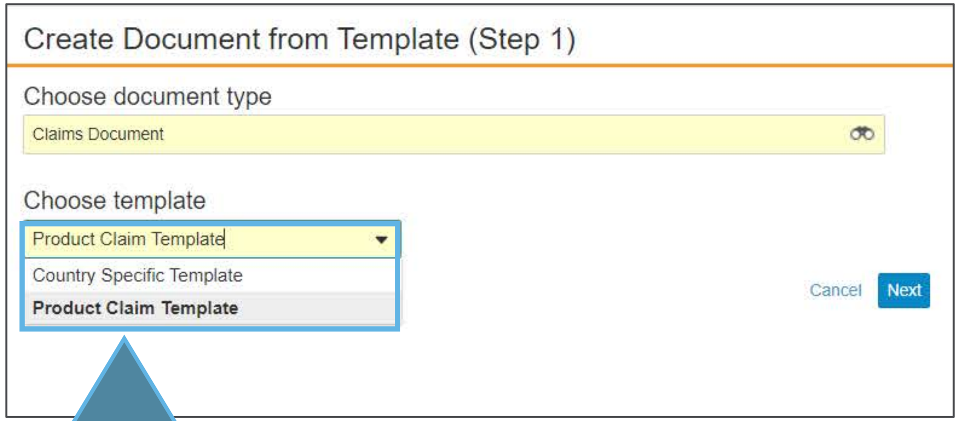
- Considerations
  - For multi-document workflows from the Cart if there is an issue adding documents to the workflow, the warning dialog presents the document numbers that are causing issues

Template Search Enhancements

- Overview
  - When creating documents from templates, the field where users select a template is now a type-ahead field
  - This allows users to find templates quicker in Vaults where there are many templates available for the selected document type



When choosing a document type from the Create Document from Template Step 1, Vault will only populate Document Types that contain templates

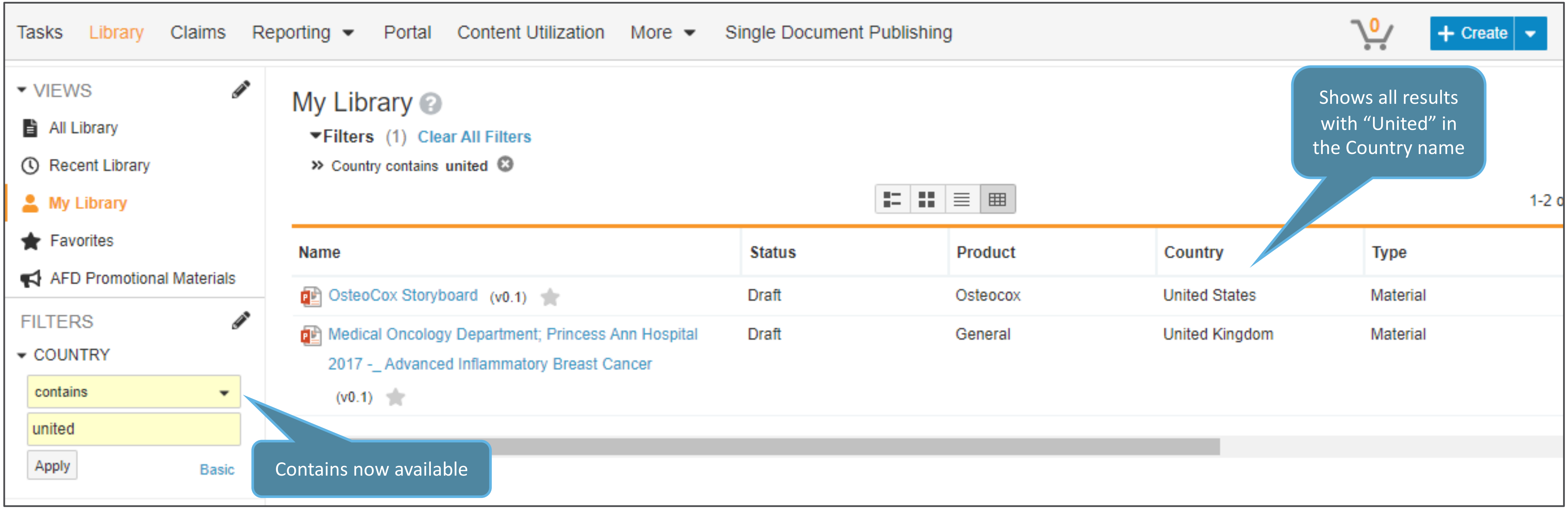


After selecting the available document type, the associated templates are autogenerated as you attempt to type

Auto-On: Searching & Filtering

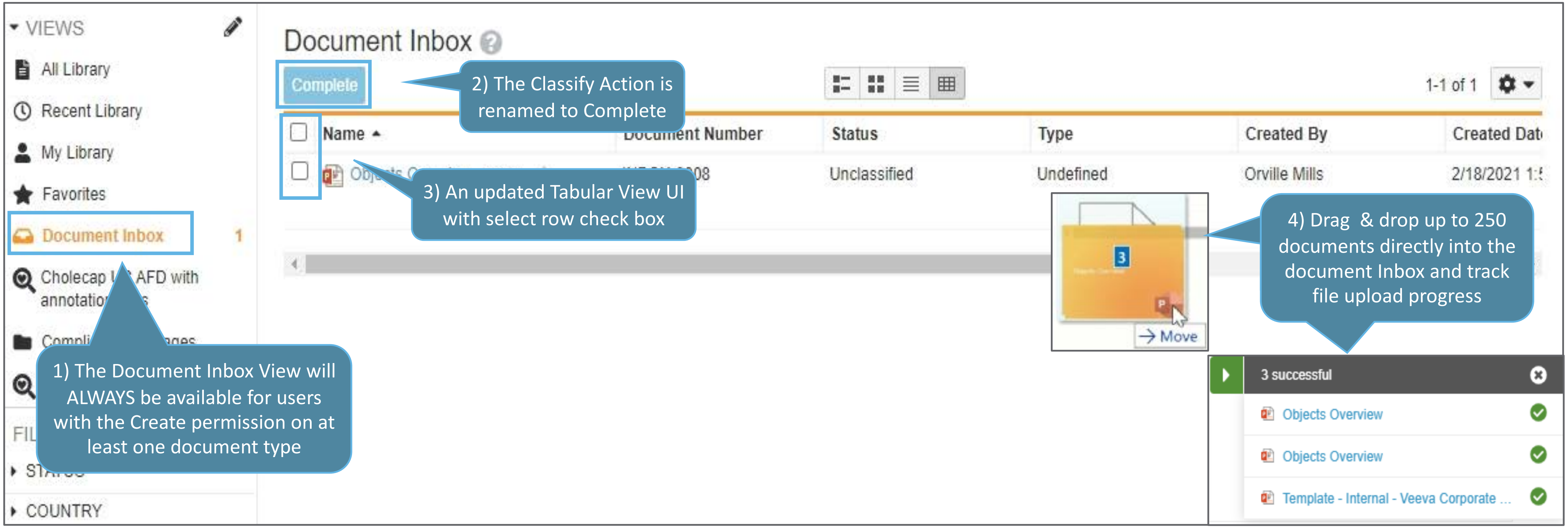
Contains Operator for Advanced Filtering

- Overview
  - Contains operator available for filtering Picklist and Object fields in Library View, making user navigation quicker



Document Inbox Improvements

- Overview
  - The Document Inbox has received several improvements:



Auto-On: Reporting

New Auto-On Report Enhancements

Additional Functions in Report Date Filters

- This feature provides support for the use of If() functions and several other logical operators, including =and !=, to report date filters
- Help users narrow the scope of their report even further through utilizing additional functions

Exports of Icon Fields in Reports Return Alternative Text

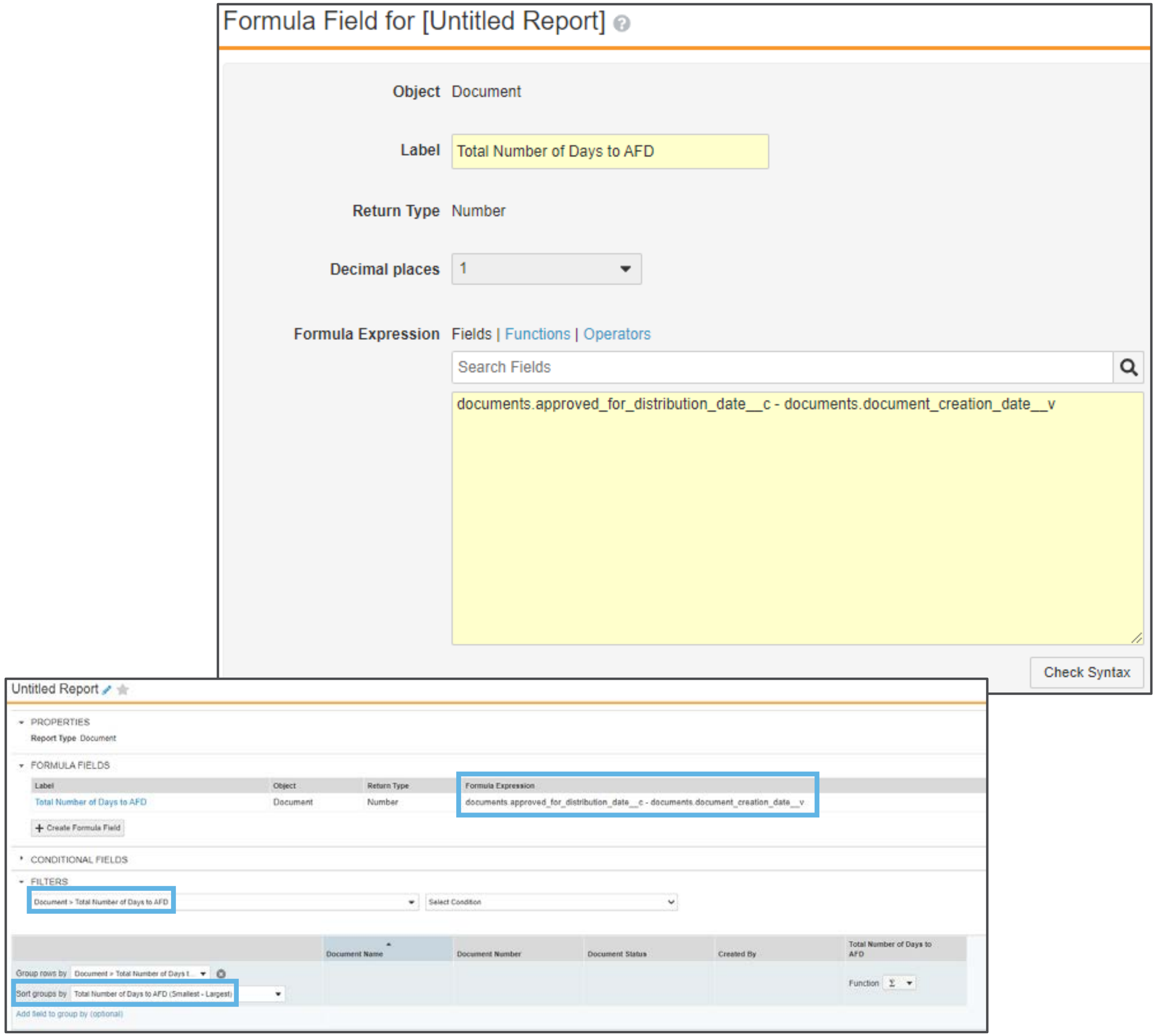
- This feature makes it easier for a user to identify Icon-type Formula fields with alterative text instead of the full formula when making exports
- Provides users with an easier way of understanding Icon-type formula Fields in reports with text from an export

Improved Handling of Hyperlinks in Excel Exports

- With this new feature, report exports to Microsoft Excel™ will give you the ability to have more than 65,000 links improving the previous 65,000-hyperlink limit with Excel
- User will not have to use the following workarounds when their exports contains 65,000 plus hyperlinks:
  - Export to CSV or TXT; the links are included as plain text in a separate column
  - Add filters to the report to reduce the number of records to reduce the number of hyperlinks in the Excel file

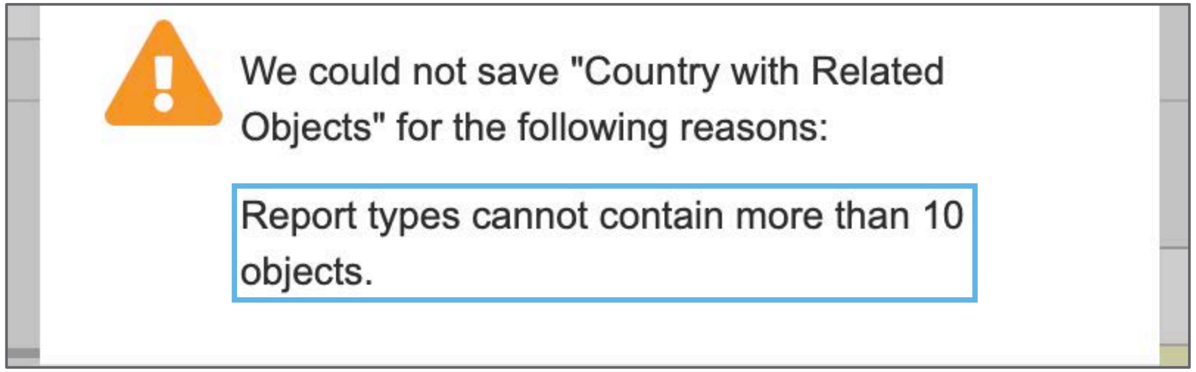
Formula Fields in Document Reports

- Overview
  - This feature allows users to define formula fields directly in their document reports
  - Users have access to a rich set of functions and operators to analyze and format their document data
  - This feature empowers customers to perform calculations as required by the business, without having to change the data model to support this
  - Formula fields can then be used as filters, added as columns, or used as row groupings
- Use Case
  - Use this to track the time between key stages in your promotional content based on key date information



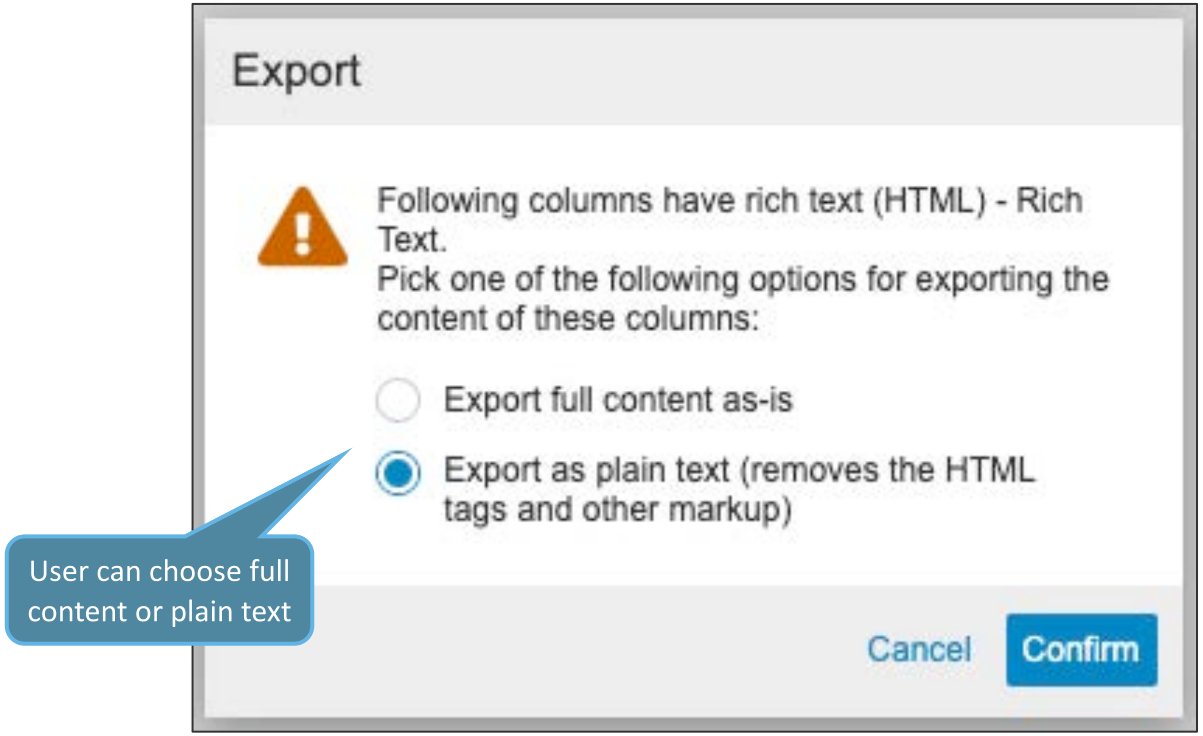
Increase Maximum Number of Objects for Standard Report Type

- Overview
  - This feature increases the default maximum number of objects that can be included in a standard report type from five (5) to ten (10)



Enhanced Support for Rich Text & Long Text in Reports

- Overview
  - This feature allows users to export the full text of Rich Text and Long Text fields from reports
  - Users can:
    - Export Rich Text Fields
    - Can now view the full text within the context of the report



Column Sorting in Reports: Consistent with Library

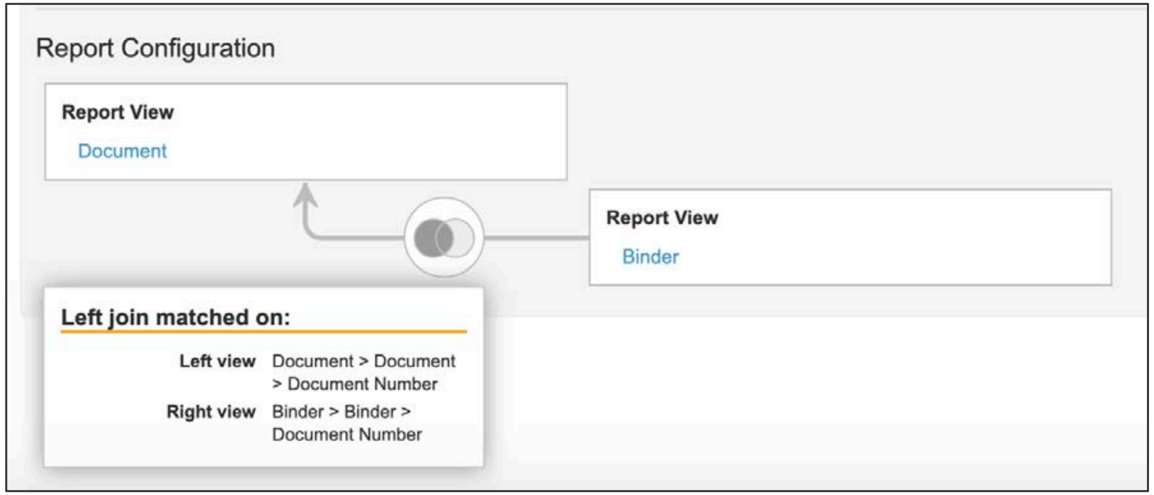
- Overview
  - In order to make column sorting in Reports consistent with how the Library and other lists within Vault work, it has been updated so that:
    - It is now case insensitive (text beginning with the same characters appear next to each other regardless of capitalization)
    - Blank cells will appear at the end of the list when sorted in ascending order as they currently do for descending results

Workflow Name	Workflow Owner	Workflow Start Date	Workflow Completion Date	Document Name	Audience
Approval	Janice Ruiz	3/2/2020 11:57 AM EST	4/1/2020 10:27 AM EDT	VeevaProm HCP Presentation Rise Above (v1.0)	Healthcare Provider
Approval	Janice Ruiz	3/2/2020 11:57 AM EST	4/1/2020 10:27 AM EDT	VeevaProm HCP Presentation Rise Above (v1.0)	Healthcare Provider
Review	Maria Ruoto	4/22/2020 12:55 AM EDT	4/22/2020 12:56 AM EDT	Ch 3.0	re Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Ch 3.0	re Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Cho 3.0)	ealthcare Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Cholecap Follow-Up (April 2020) (3.0)	Healthcare Provider
Approval	Maria Ruoto	4/9/2019 1:33 AM EDT	4/9/2019 1:34 AM EDT	Public Content Distribution Deep Dive_Public Content Distribution (v1.0)	
Approval	Maria Ruoto	4/9/2019 1:33 AM EDT	4/9/2019 1:34 AM EDT	Public Content Distribution Deep Dive_Public Content Distribution (v1	

When sorting, blank cells will always appear at the end of the resulting list

Multi-Pass Reports Support Binders & Document Relationships

- Overview
  - Admins can now define binder reports and document relationship reports as report views and Join binder reports and document relationship reports to other report types, including object, document, and workflow reports



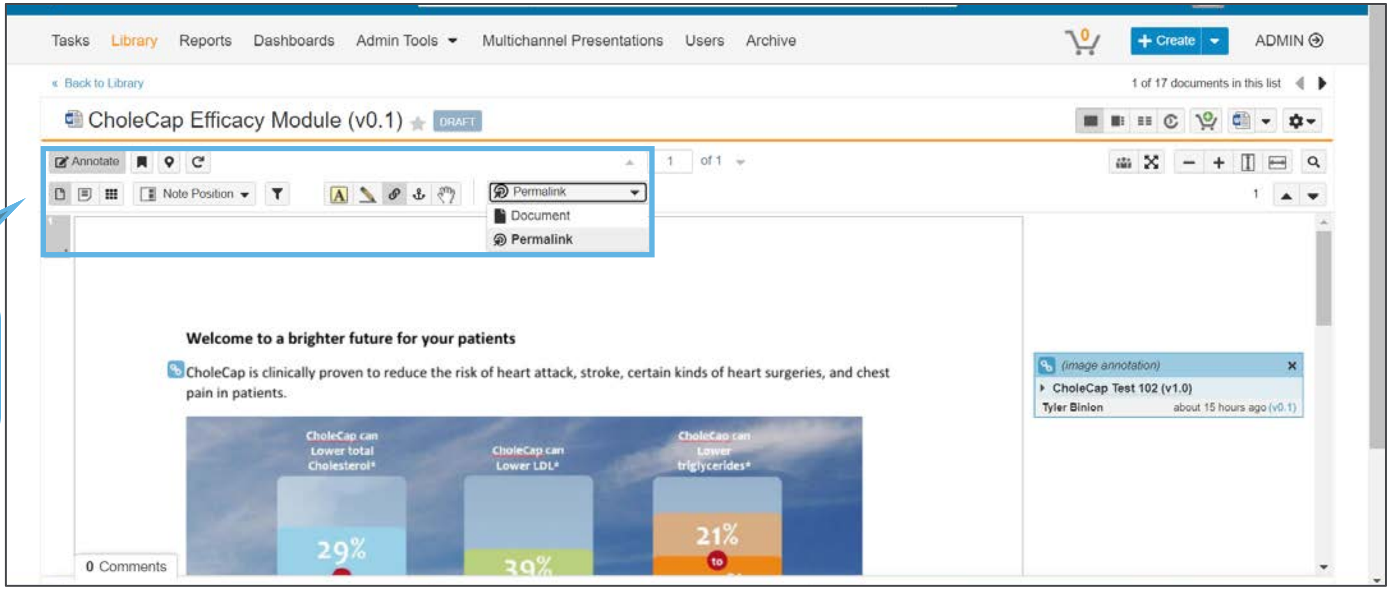
- Considerations
  - Not yet supported:
    - Binder Section with Document
    - Binder Section with Document and Binder
- Use Case
  - Users may need to identify which documents are not included in binders. To see this, they could create a Multi-Pass report that shows the relevant documents and all binders with documents, which will allow them to determine which documents are not in a binder
- Learn more about [Multi-Pass reports]

Configurable

Link Annotations to Permalinks

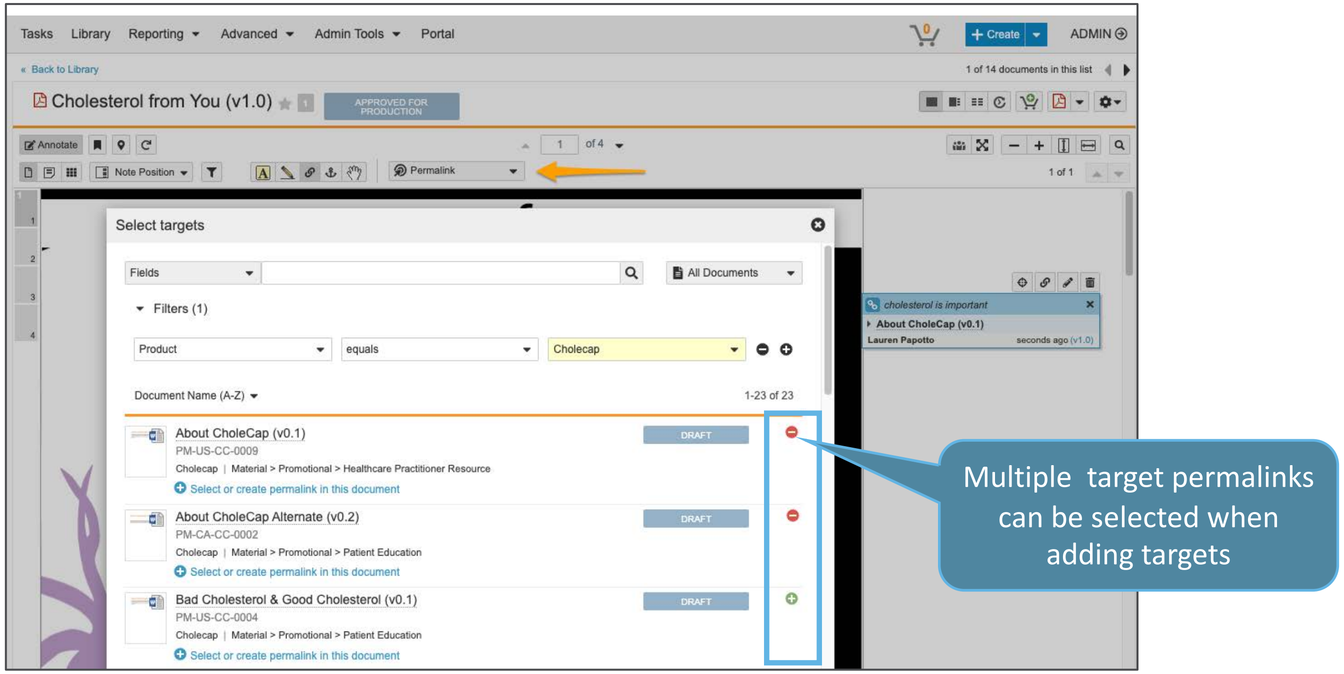
- Overview
  - This feature allows users to link annotations to permalink targets which will keep your link annotations with the most recent version of that specific permalink target (subject to user permissions)

Once enabled in Vault, a Permalink option will be available when adding links



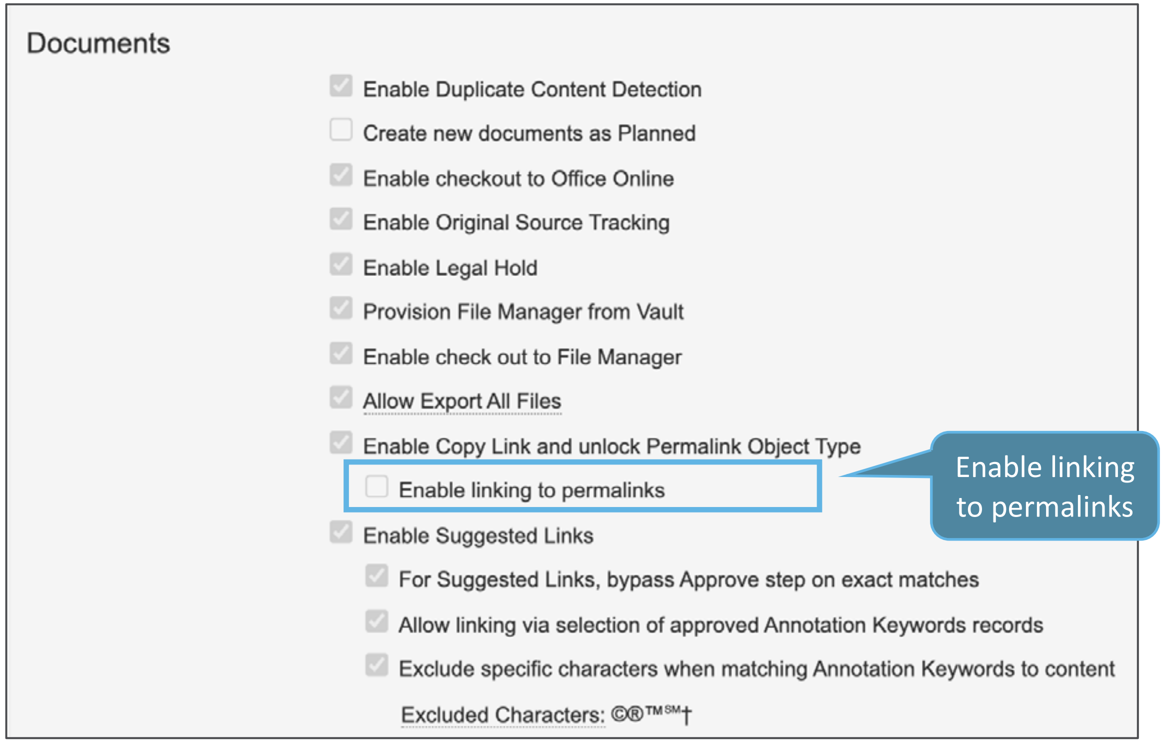
Link Annotations to Permalinks

- Considerations
  - Creates distinct version-less Linked Document relationships
  - Link annotations auto-update
  - Requires the same permissions as linking to documents and anchors
  - Treated as Manual Links in filters and export (PDF with Annotations, Export Annotations)
  - A single permalink annotation can be linked to multiple targets



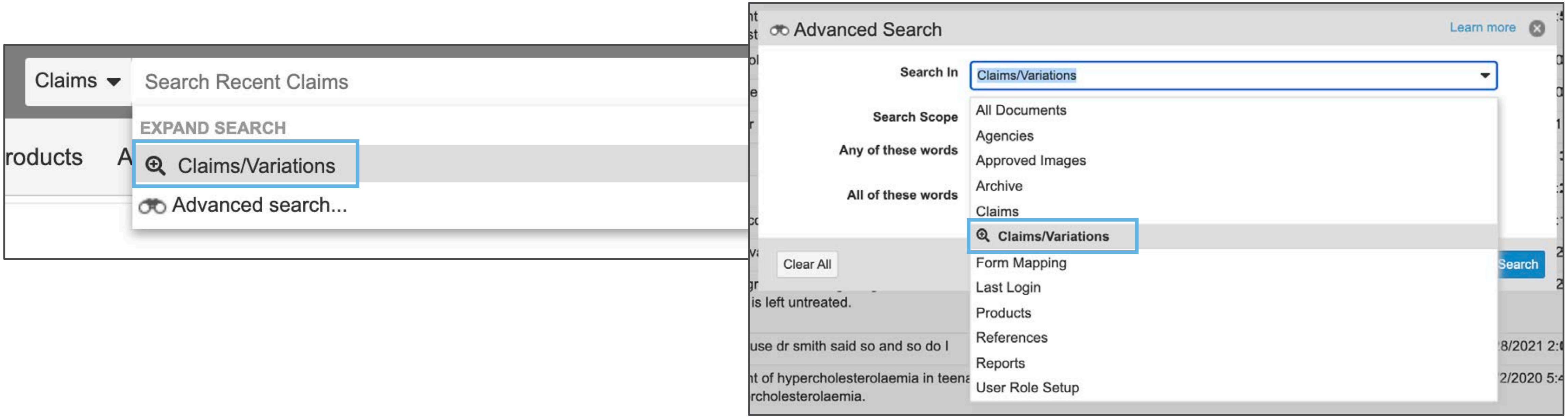
Link Annotations to Permalinks

- Configuration
  - Admin > Settings > General Settings > Documents > Enable linking to permalinks



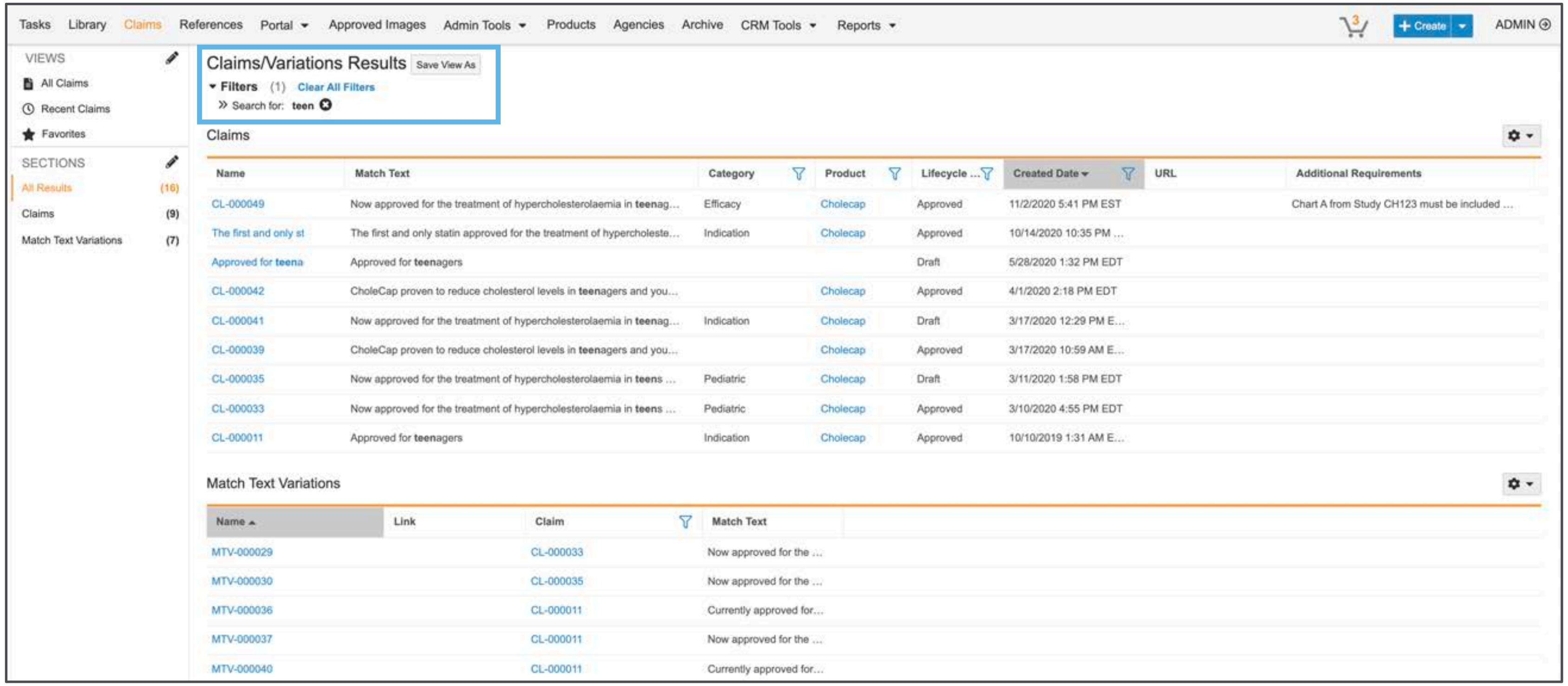
Expanded Search

- Overview
  - Users can search collections of objects when executing a single search within Vault, allowing users to:
    - Expand their search from a single object in a custom tab to all objects in the collection
    - Filter and sort the search results for each of the objects independently to build a refined view of records across the collection
    - More easily locate data and information they are searching for without having to be precise against which object record they are searching
  - Collections, denoted with a square plus icon , are nested below related parent tabs
  - Vault displays your search results in the expanded search results view



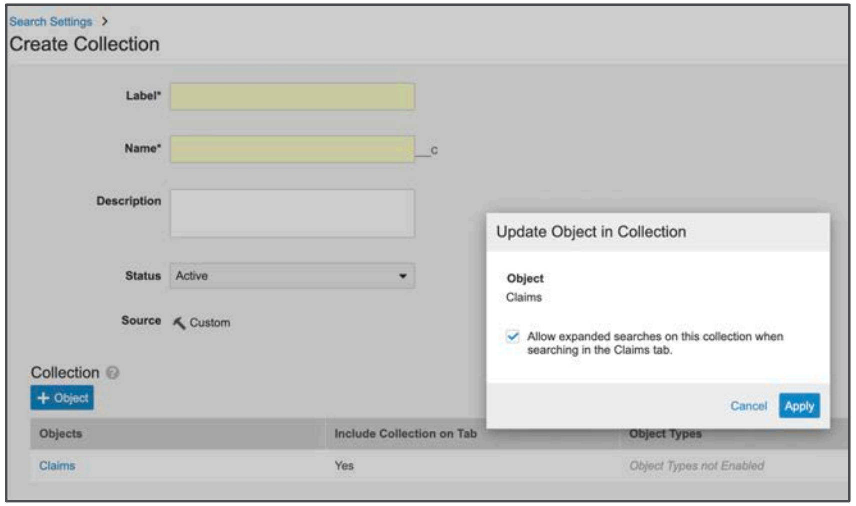
Expanded Search

- Considerations
  - Admins can create up to 20 collections
  - From custom tabs, Vault displays any available collections in the Expand Search section
  - Users can expand both Basic Searches and Advanced Searches
- Use Case
  - Users can use this to search across all Auto Claim Records and Match Text Variations for a search term with a single search



Expanded Search

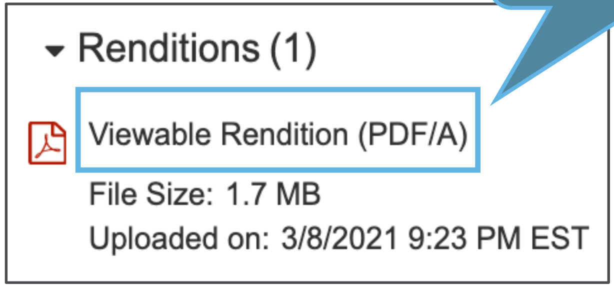
- Configuration
  - Navigate to Admin > Settings > Search Settings
  - Click Create in the Search Collections section of the page
  - Enter a Label and a Name for the collection. The Label should reflect a specific business process of your organization so that users know what to select when expanding their search.
    The Label will also appear as the title of the search results page when users execute an expanded search against the collection
    - Optional: Enter a Description. The Description appears to users when they click on the question mark (?) icon next to the title of the expanded search results page
  - Click on the Object button in the Collection section to add an object to the collection
  - Select an Object
    - Optional: If available, select Object Types to filter on
    - Optional: If available, you can set the option to allow expanded searches on the collection in the related tab
  - Click Add to add the object to the collection
    - Optional: Add additional objects to the collection. You can add 15 objects to a collection
  - Click Save to save the collection



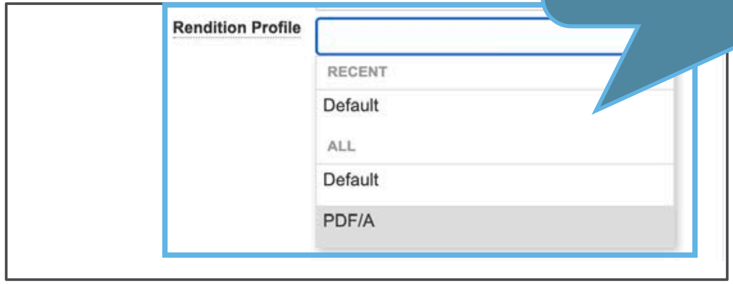
PDF/A Viewable Renditions

- Overview
  - This feature has provided Vault with the ability to support PDF/A viewable renditions
    - PDF/A is a widely-adopted ISO-standardized (190005) Portable Document Format specialized for use in the archiving and long-term preservation of electronic documents. PDF/A differs from PDF by prohibiting features unsuitable for long-term archiving, such as font linking and encryption
- Considerations
  - When PDF/A renditions are enabled Vault wide, Vault does not generate standard PDF renditions
  - Alternatively, A rendition profile can be created in order to limit PDF/A rendition generation to specific documents
    - You must assign the ‘Rendition Profile’ shared document field to any specific document type, subtype, or classification for which you want the option to generate a PDF/A-compliant viewable rendition to be available
  - Vault does not automatically re-render existing viewable renditions when you enable PDF/A compliant renditions

Viewable Rendition will be identified as PDF/A

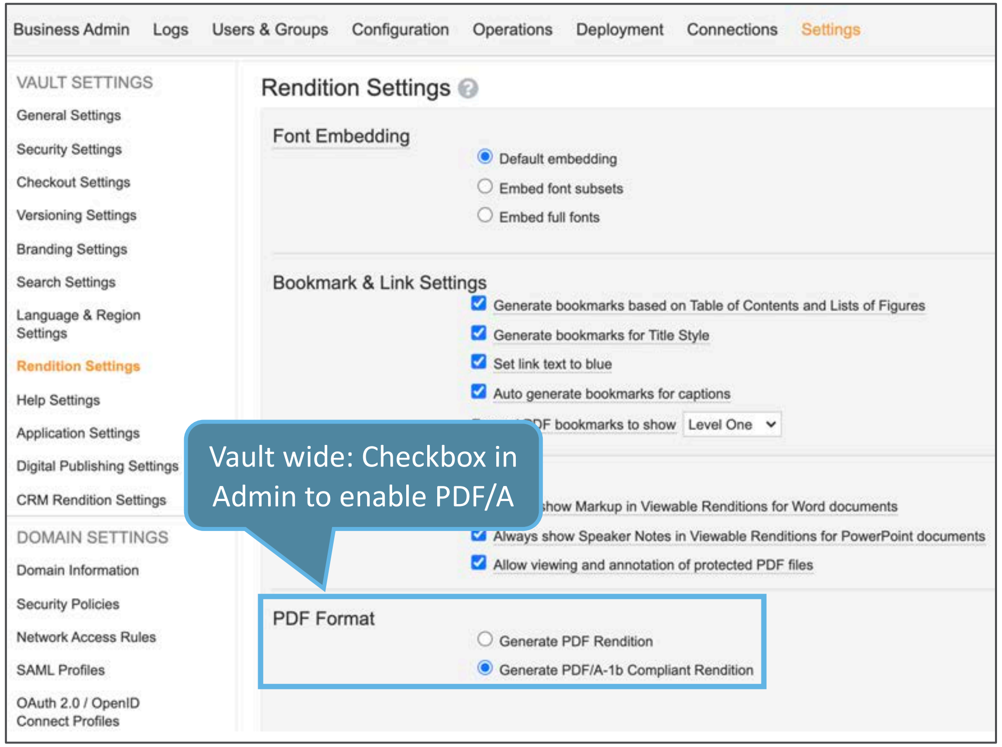


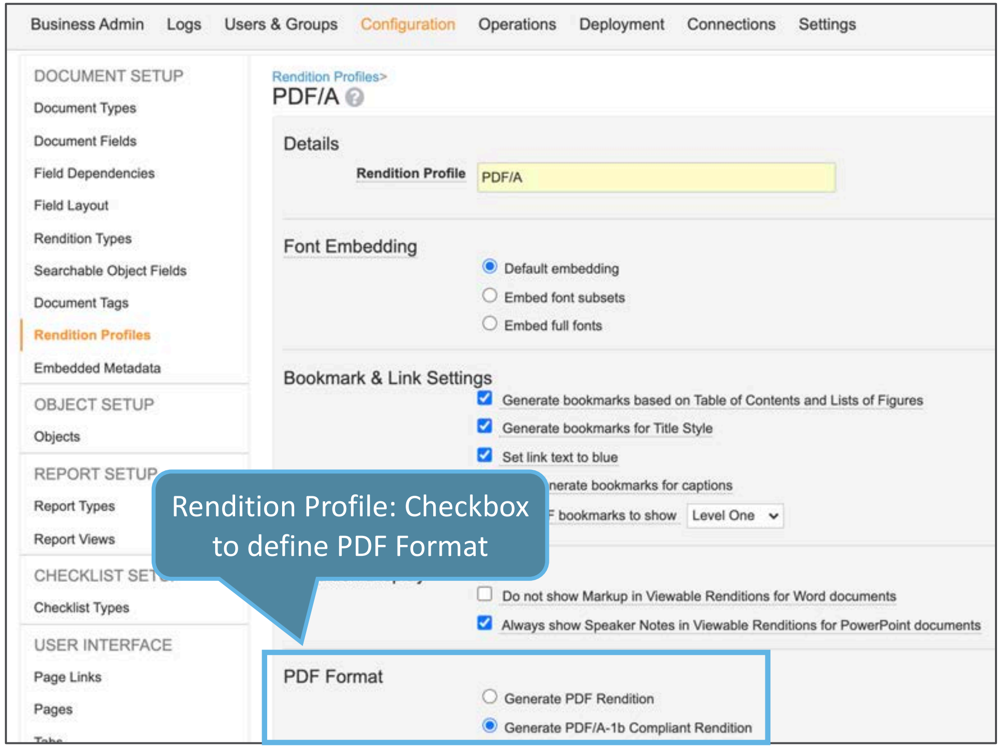
When enabled for use on specific documents, users will select the Rendition Profile the document will use



PDF/A Viewable Renditions

- Configuration
  - To Enable Vault wide: Admin > Settings > Rendition Settings > PDF Format > Generate Pdf/A-1b Compliant Rendition
  - Rendition Profile to use on specific documents: Admin > Configuration > Rendition Profiles > Create
    - Enable ‘Rendition Profile’ shared document field to any specific document type, subtype, or classification for which you want the option to generate a PDF/A-compliant viewable rendition to be available





Modular Content

Our Definition of Modular Content

Modular content represents a dramatic shift in how teams draft, review, and distribute content

Instead of creating each asset **from scratch**

A modular approach relies on **pre-approved content blocks, or modules**, that teams can quickly and easily recombine into polished assets

Our Definition of Modular Content

Modular content represents a dramatic shift in how teams draft, review, and distribute content

Create relevant content faster

Increase content re-use

Create compliant omnichannel content at scale

Dramatically faster MLR

Admin

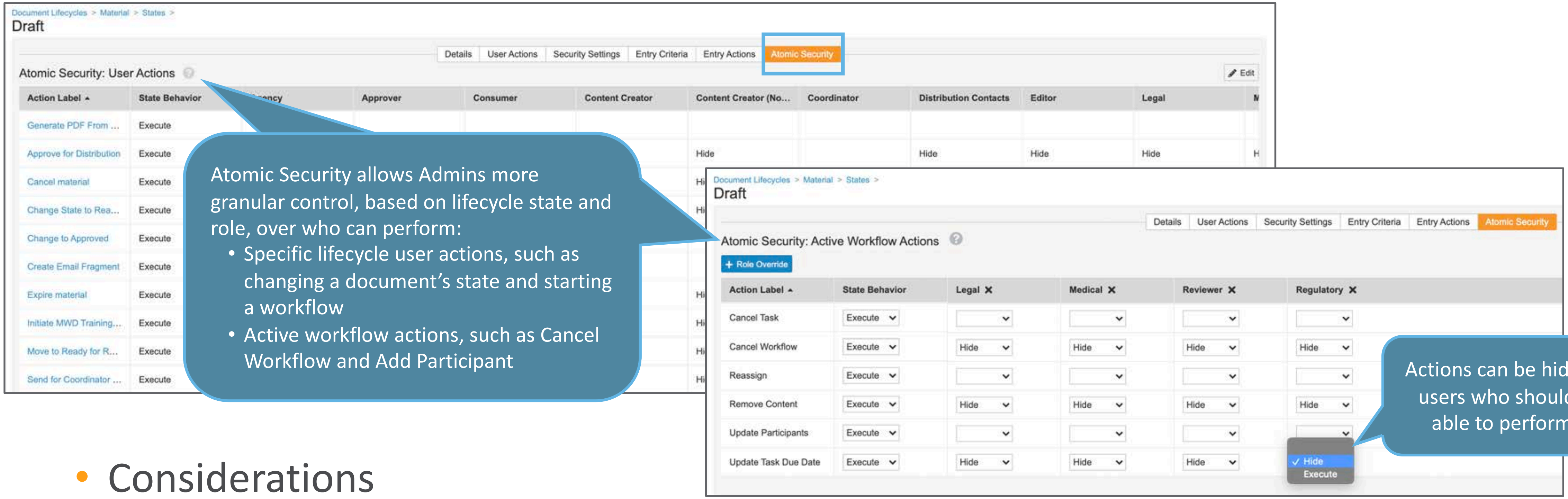
Enhancements to API Limits

- Overview
  - As of 21R1, the Vault API will no longer enforce daily API call limits
  - The Vault API will no longer return Daily Limit HTTP headers in responses when using API version 21.1 or greater
  - Past versions of the Vault API (20.3 and older) will return the following static values:
    - X-VaultAPI-DailyLimitRemaining: 999,999
    - X-VaultAPI-DailyLimit: 999,999

- Considerations
  - Vault will still enforce the Burst API Limit
  - When a Vault reaches the Burst Limit, each subsequent API call will be delayed 500ms until the burst period has expired

Atomic Security for Document Lifecycles Enablement Change

- Overview
  - Atomic Security for document lifecycles will now be available for all Vaults, without having to request it from Support



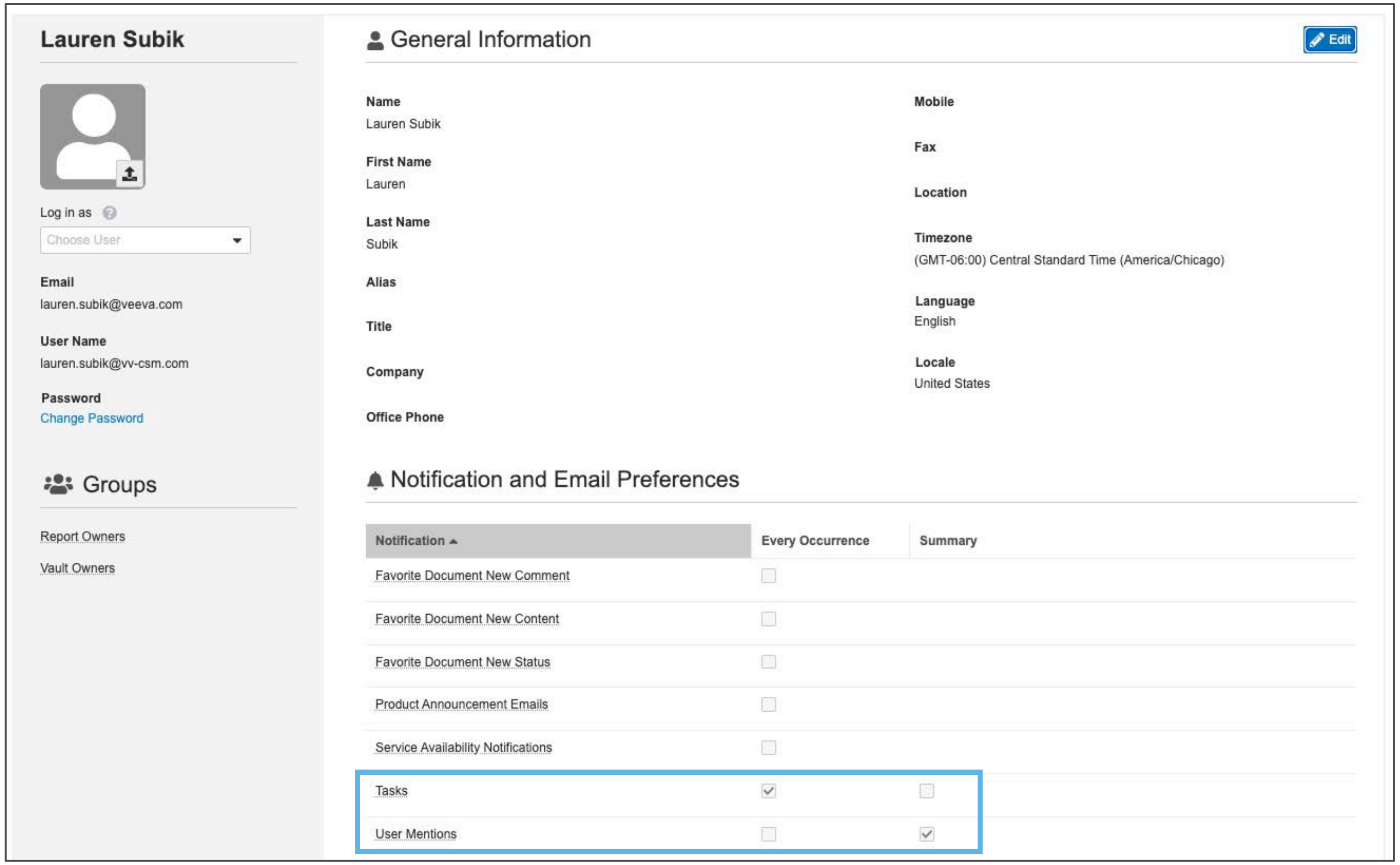
Atomic Security allows Admins more granular control, based on lifecycle state and role, over who can perform:
- Specific lifecycle user actions, such as changing a document's state and starting a workflow
- Active workflow actions, such as Cancel Workflow and Add Participant

Actions can be hidden from users who should not be able to perform them

- Considerations
  - This enablement change does not affect end-users of Vault
  - Workflow Initiators and users in the Coordinator role will continue to have automatic access to active workflow actions

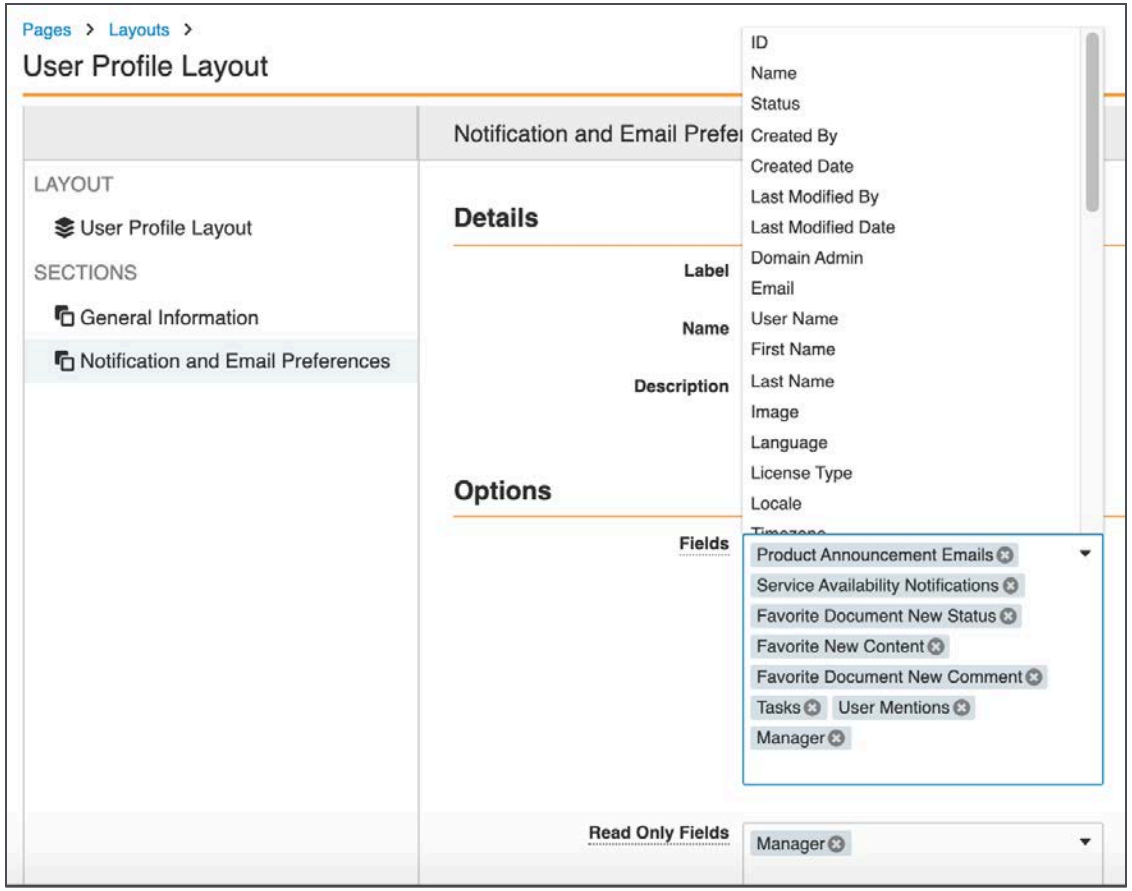
Enhanced User Profile Page

- Overview
  - The User Profile page has an updated layout and added customizability which allows Admins to configure the User Profile page to:
    - Show or hide fields
    - Give users the ability to update certain *User* fields
- Use Case
  - Admins can allow their users to set task notification preferences to either receive a notification every time a workflow task is assigned or to get a daily summary notification



Enhanced User Profile Page

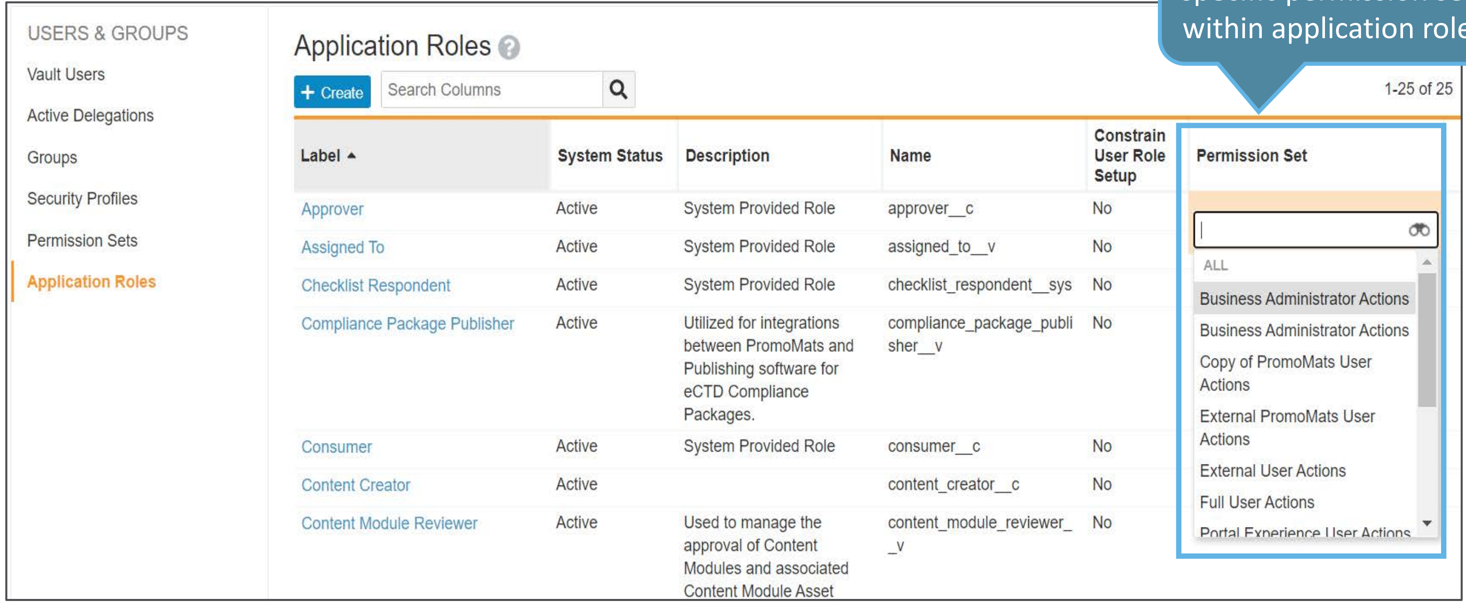
- Considerations
  - The new User Profile page is based on the User object
  - Vault now has a new application permission for users: *View User Profile*
    - By default, all users have this permission to maintain existing behavior
    - Admins now can remove this permission and hide the User Profile page, if needed
- Configuration
  - Admin > Configuration > Pages > User Profile Page > User Profile Layout
  - Select either General Information or Notification and Email Preferences
  - Add or remove items from either the Fields or Read-Only Fields boxes
    - Only fields that have been added to the fields box can then be added to the read only box



Role Permissions

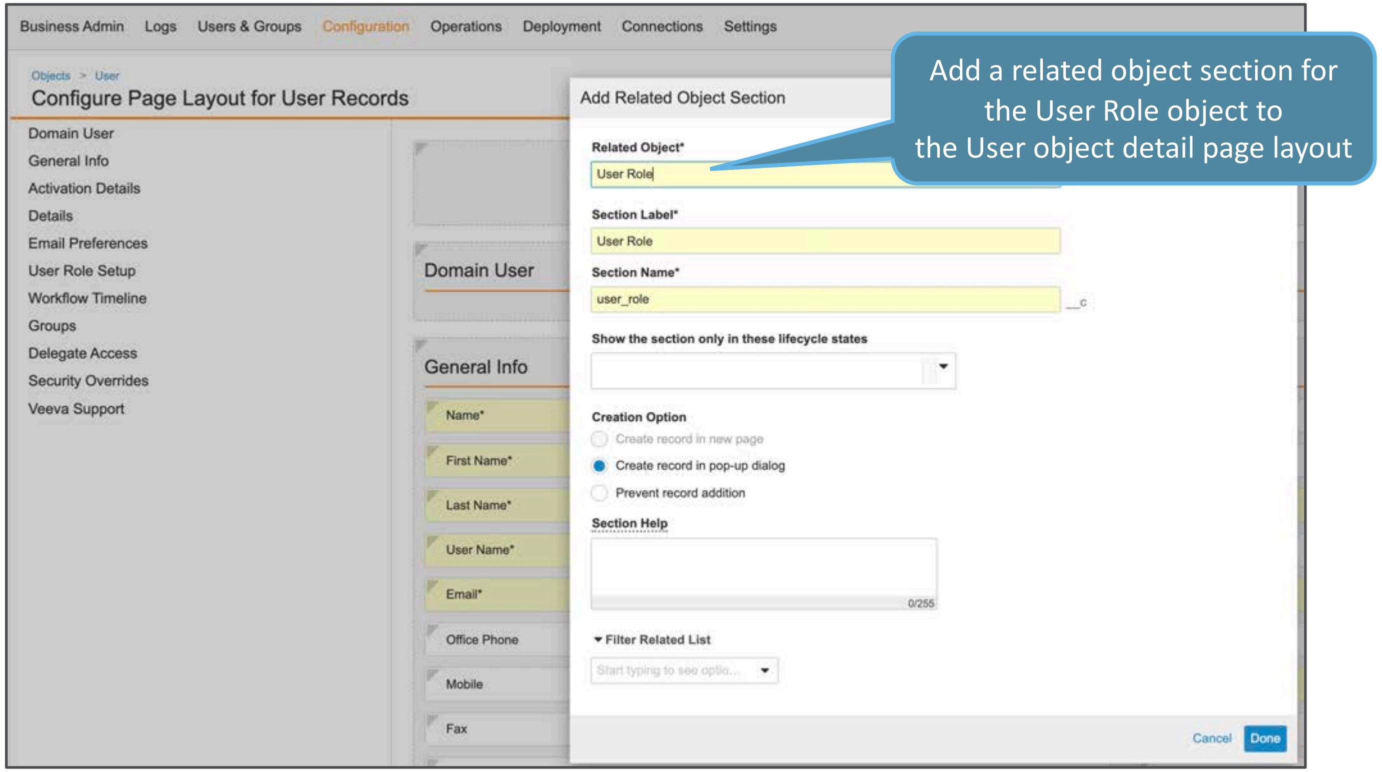
- Overview
  - This new feature allows Admins to grant individual permission sets to users outside of security profiles by assigning User Roles
- Considerations
  - Access can differ based on specific application role assignment, which, for example, might be determined by additional responsibilities or training level
  - There will be a new VOF join object user_role_sys (up to 15 active user role assignments)
- Use Case
  - This feature can be used to simplify complex security profile configurations

Users can be added to specific permission sets within application roles



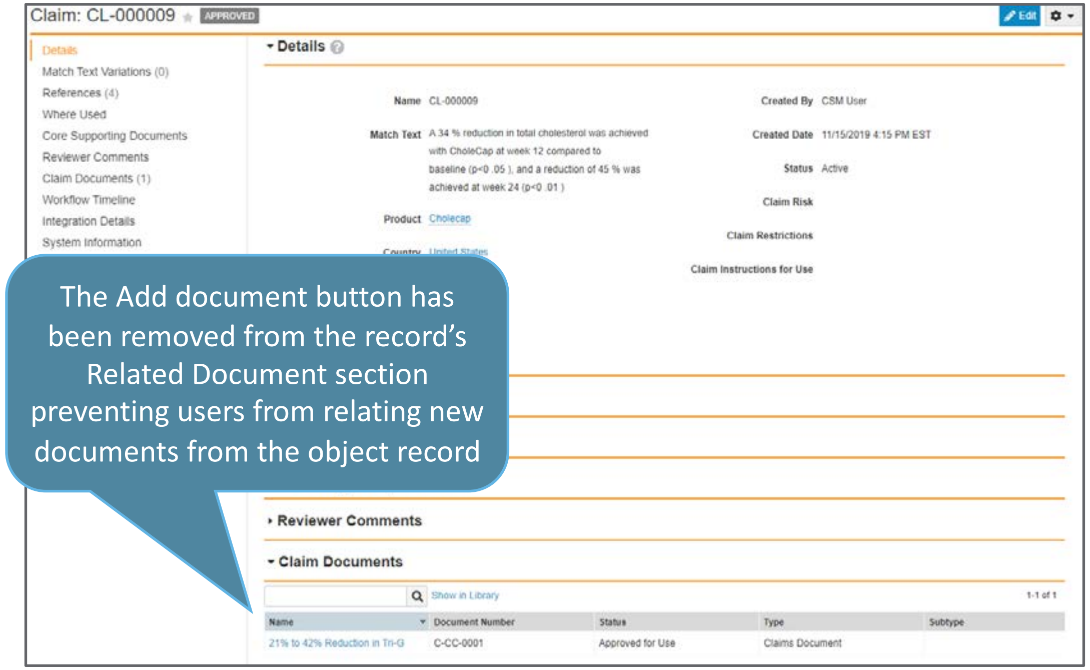
Role Permissions

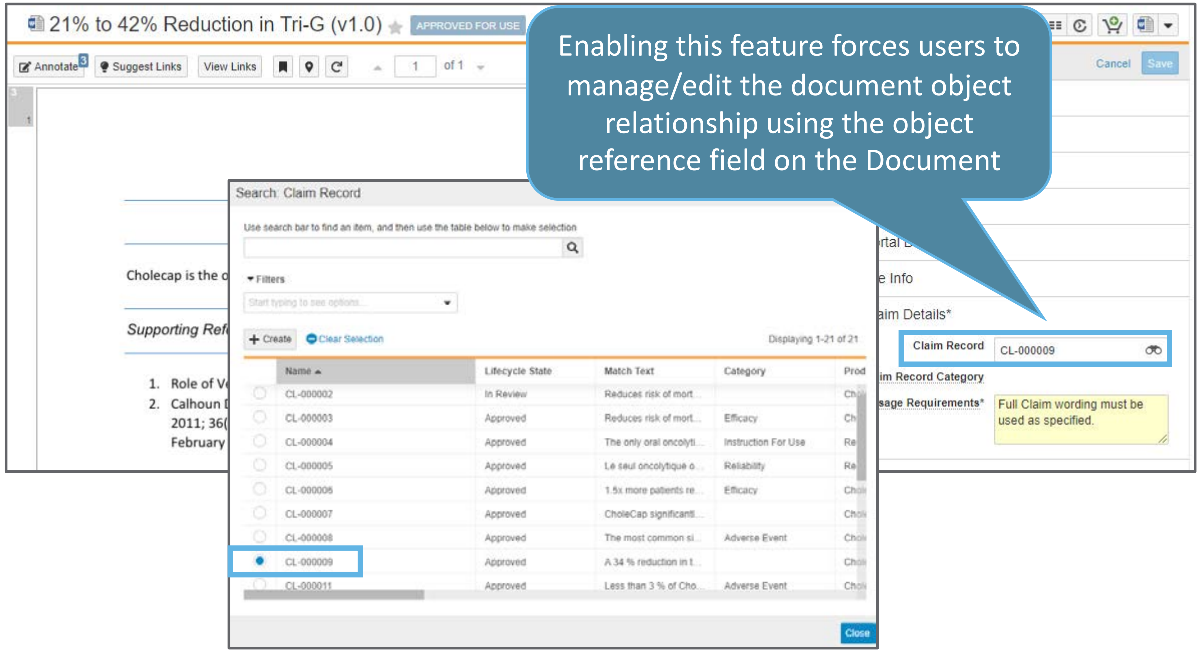
- Configuration
  - Admin > Configuration > Objects > User > Page Layouts > User Detail Page Layout > Add Section > Related Object > User Role Add a related object section for the User Role object to the User object detail page layout
    - Optional: To allow access to User object records outside of Admin > Users & Groups > Vault Users, select Display in Business Admin menu in the User object configuration, or add a User custom object tab



Prevent Document Add in Related Document Section

- Overview
  - With this feature, Admins now can control whether users can add new related documents directly in the Related Document section on an object record

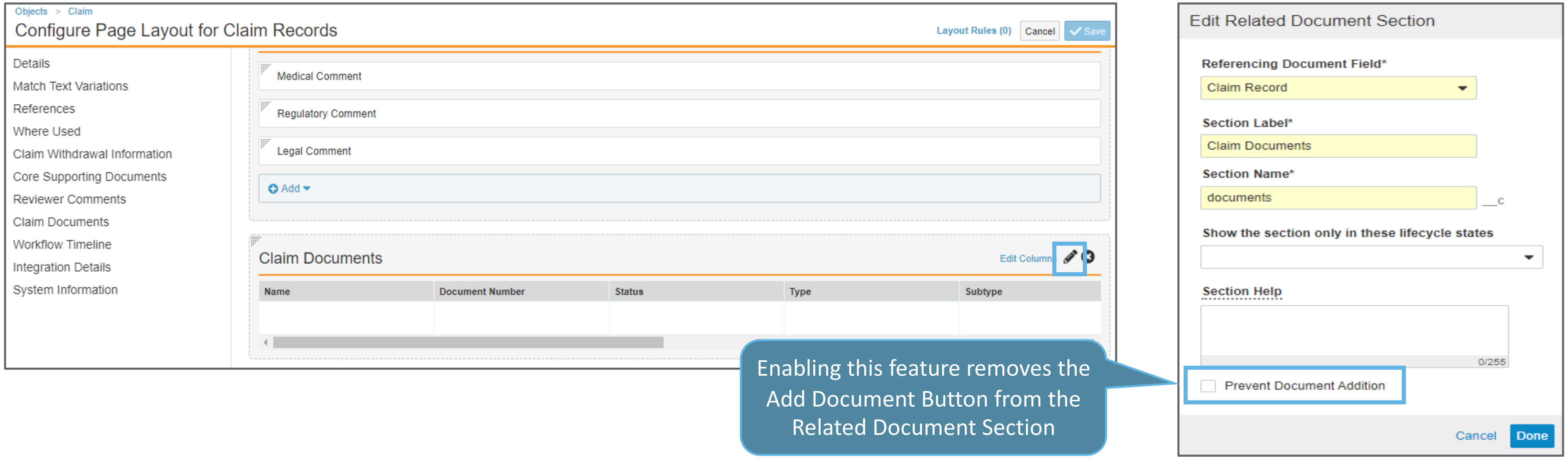




- Use Case
  - Organizations can leverage this feature to have more granular control over how users create and manage relationships between an object record and it's related documents

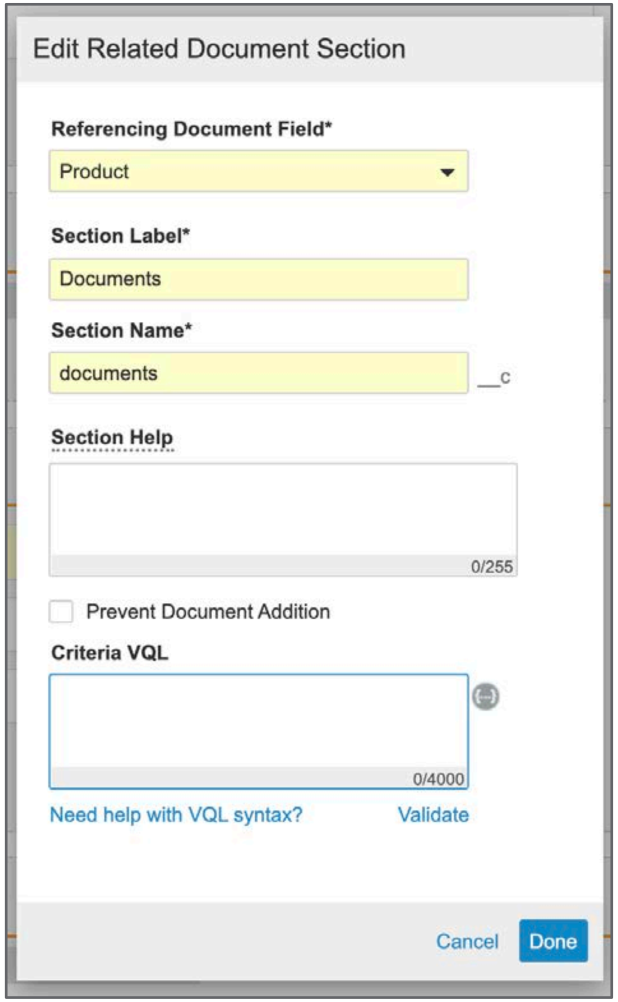
Prevent Document Add in Related Document Section

- Configuration
  - Admin > Configuration > Objects > {Object} > Page Layouts > {Layout} > Edit Related Document Section > Enable Prevent Document Addition



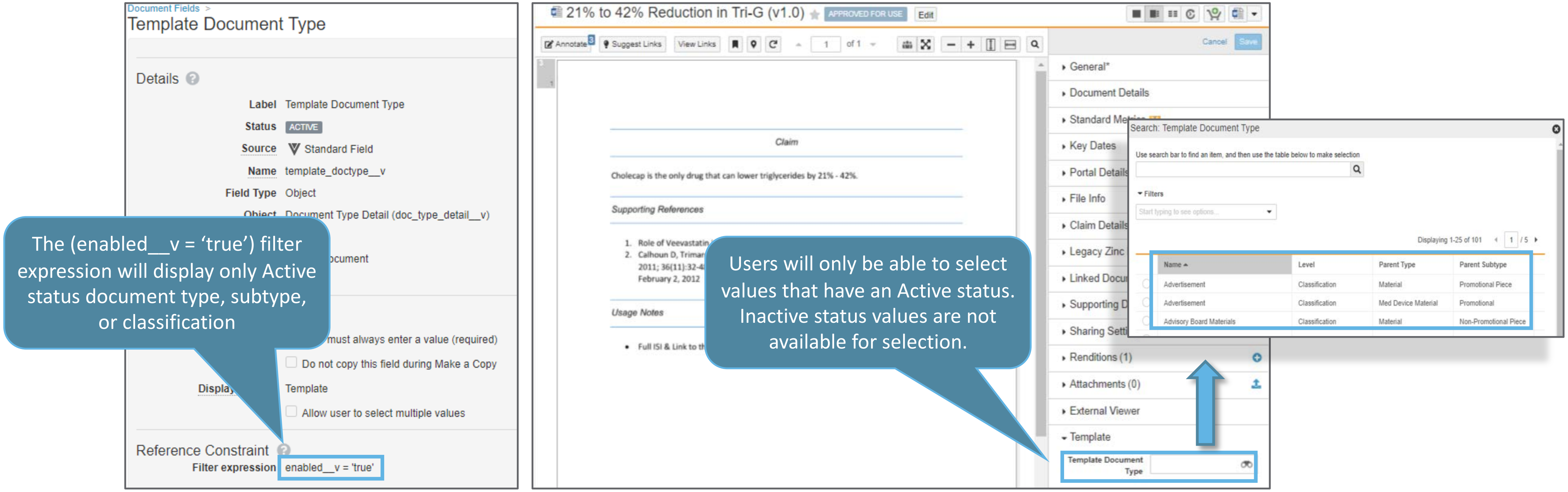
Related Document Section Filters

- Overview
  - Admins can configure Criteria VQL filters on Related Document sections in object page layouts to restrict the documents that users can add
  - Admins can use fields on the related document and on the current record to construct query conditions and filter the list of documents shown in the related document section
  - Allows users to select content that is relevant to the object record more quickly
- Considerations
  - Users must have Read permission on all fields used in the filter in order to access the relevant related documents section on object records
- Use Case
  - Can be used on any object record to apply restrictions via VQL



Enabled Field for Document Type Detail Object

- Overview
  - The Document Type Detail object contains a new field (called ‘Enabled’) that represents whether the corresponding doc type is Active or Inactive
  - The addition of this field allows customers to configure the Template Document Type field with a reference constraint (enabled__v = ‘true’) to only show Active doc types, sub-types, or classification



Admin Field Layout Matches Doc Info

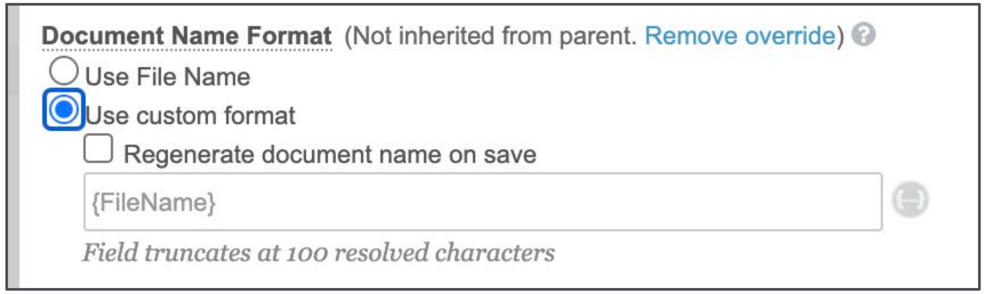
- Overview
  - The Field Layout on the Doc Info Panel will now always match the respective order of the Field Layout configuration on the Admin tab, even if an Admin imports a new section via Configuration Migration or if Veeva provisions a new section

- Considerations
  - Current Field Layout in the UI may change if there are differences from what is configured on the Admin Field Layout

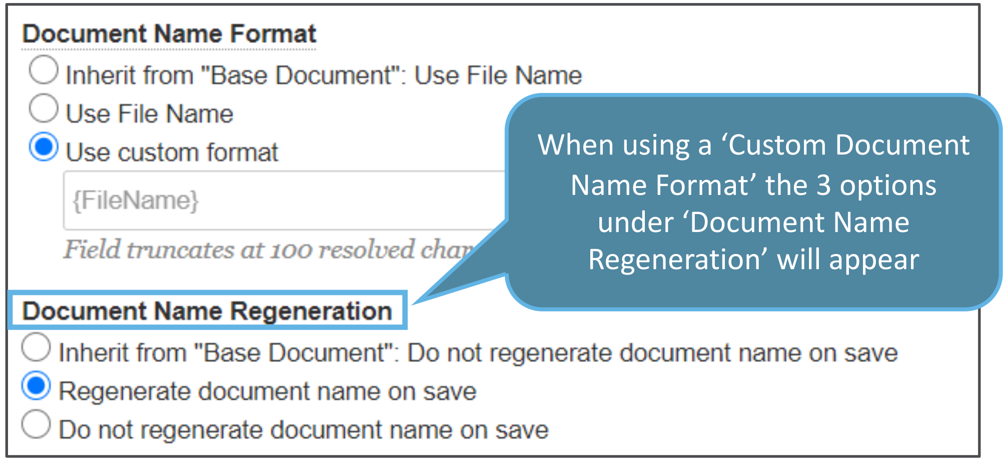
Enhancements to Document Name Inheritance

- Overview
  - The Document Name Format and Document Name Generation have been updated to clearly indicate whether the Document Name Format or the Document Name Generation is being inherited by the base document
- Considerations
  - Document Name Regeneration only appears if the Document Name Format is either 'Custom' or 'Inherited', but only where the inherited format is Custom
  - The new 'Document Name Regeneration' section will indicate if it is inherited from the parent or not

BEFORE



AFTER



Document Auto-Naming: Excluded Characters

- Overview
  - Vault will now exclude the curly bracket characters when auto-naming documents, as these can cause issues when resolving document field tokens
- Considerations
  - Previously, Vault would exclude any content inside curly brackets when using Auto-Naming
  - If necessary, we recommend using **(parentheses)** or **[square brackets]** instead
- Learn more about document auto-naming

Document ID in Document Audit Exports

- Overview
  - With this release, document audit exports to CSV will contain a Document ID column, decreasing the time needed to find specific document information in document audit exports and allowing users to quickly find the corresponding documents in Vault using the Document ID column

fx Document ID

D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Version	Action	Item	Field Nam	Old Value	New Value	Job Instan	Workflow	Task Nam	Signature	View Licen	Event Des	Document ID			
1	GetDocum	HA-2100001									Viewed D	9			
1	EditDocInf	HA-21000(	Initial Steady State D		2/17/2021 9:22 AM PST						Initial Stea	9			
1	EditDocInf	HA-21000(	Approved for Distrib		########						Approved	9			
1	EditDocInf	HA-21000(	Days to Approval		28						Days to A	9			
1	UPDATE_[	HA-2100001		0.1	1						Version n	9			
0.1	ChangeDo	HA-21000(	Status	Draft	Approved for Use						Status cha	9			
0.1	GetDocum	HA-2100001									Viewed D	9			
0.1	GetDocum	ASSET-21000004									Viewed D	15			
0.1	GetDocum	ASSET-21000004									Viewed D	15			
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0.1	EditDocInf	ASSET-210	Long Text		Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do						Long Text	15			
0.1	GetDocum	ASSET-21000004									Viewed D	15			
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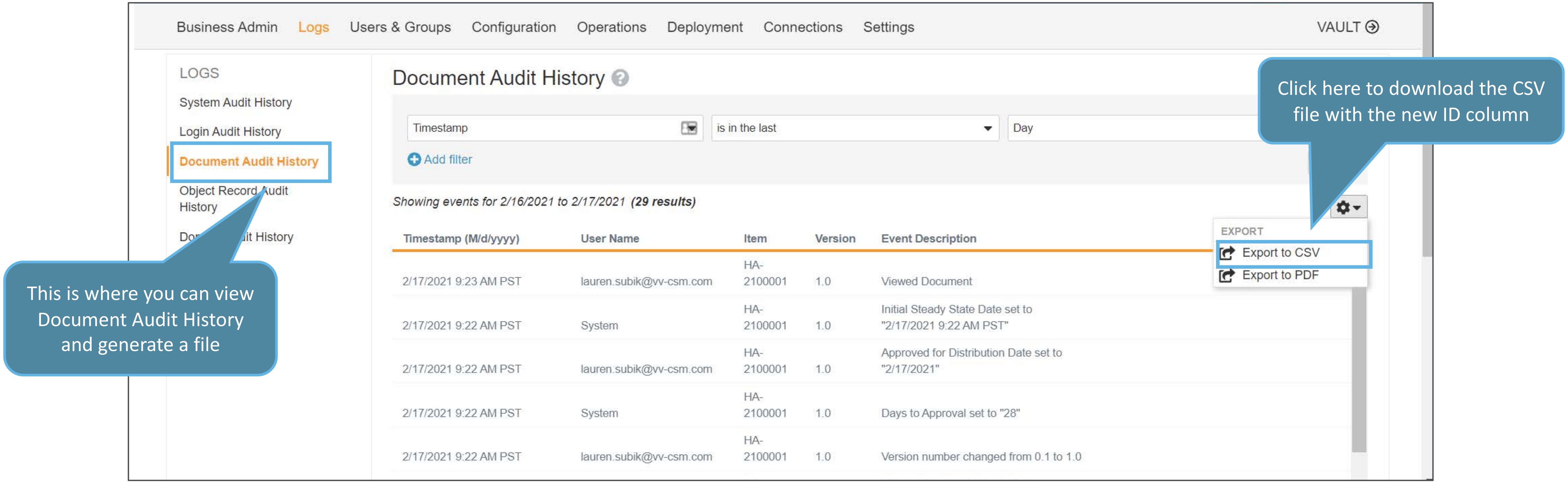
The Document Audit History CSV file pictured contains the new column

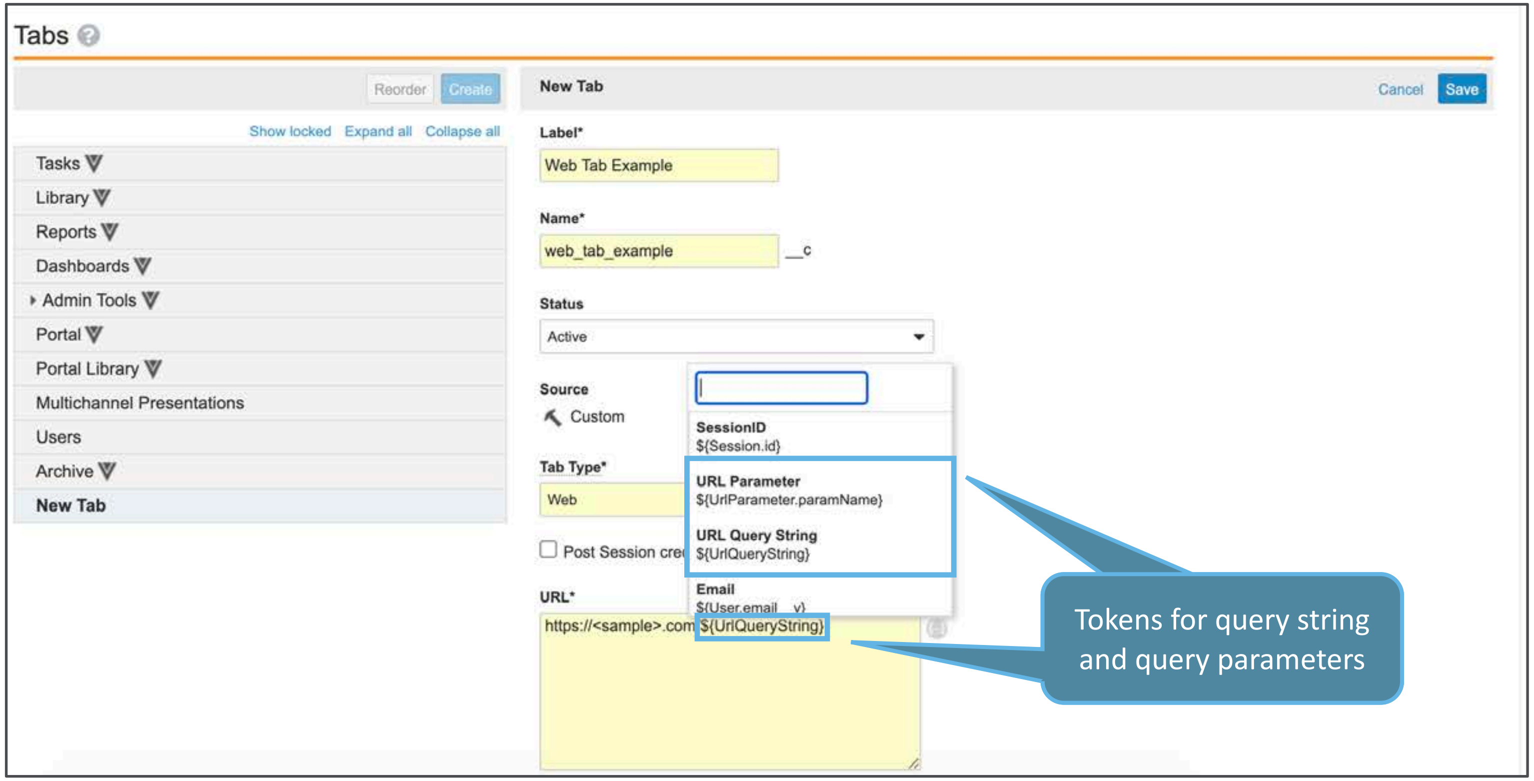
Document ID in Document Audit Exports

- Considerations
  - The following permissions affect your access to audit trails:
    - To view the audit trails, you need the *Application: Audit Trail: View permission*
    - To export audit trails, you need the *Application: Audit Trail: Export permission*
    - For the document audit trail, you must be in a role on the document that grants the *View Document* permission



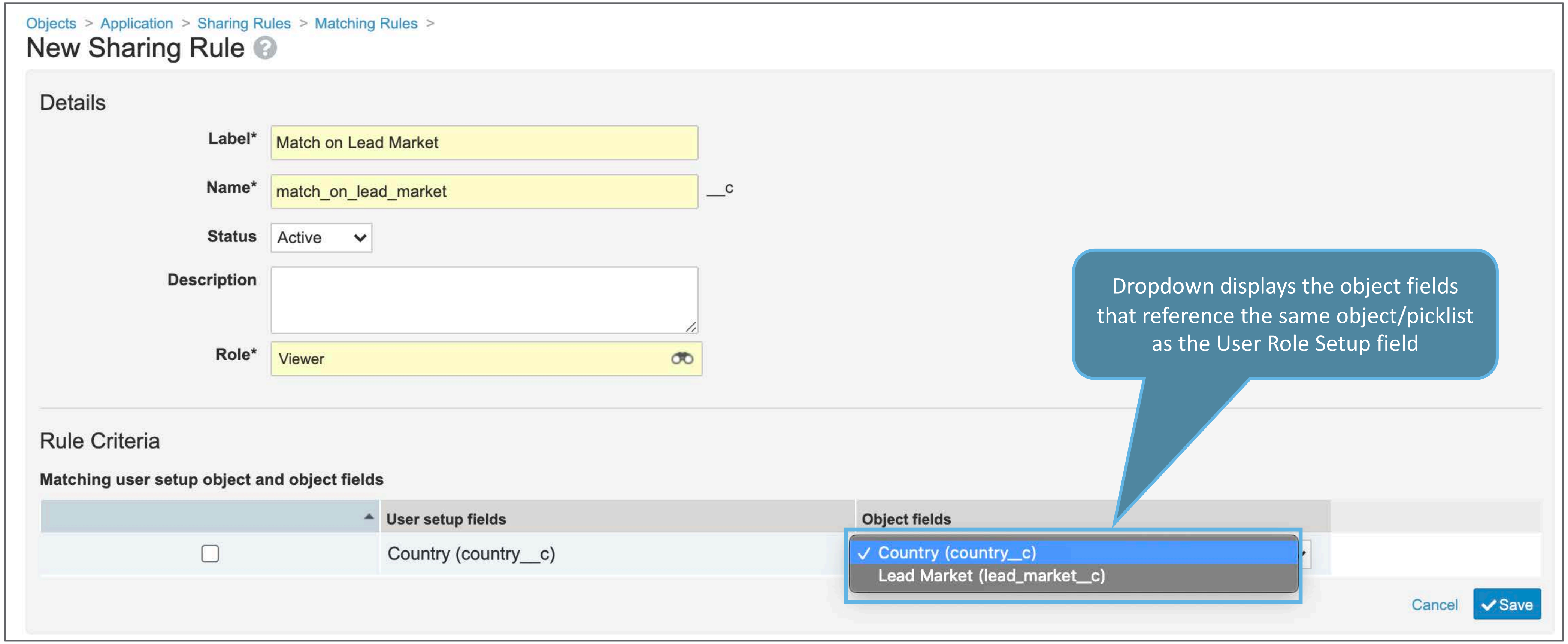
Web Tab URL Tokens

- Overview
  - Web Tab configuration now allows passing a query string or specific query parameters to the iFrame page by using tokens in the URL definition
- Configuration
  - Admin > Configuration > User Interface > Tabs > Create
  - Choose *Web* under Tab Type



Flexible DAC mapping

- Overview
  - Admins can now configure Dynamic Access Control Matching Rules based on document or object fields and user setup fields even if they have different field names, so long as they reference the same object or picklist.

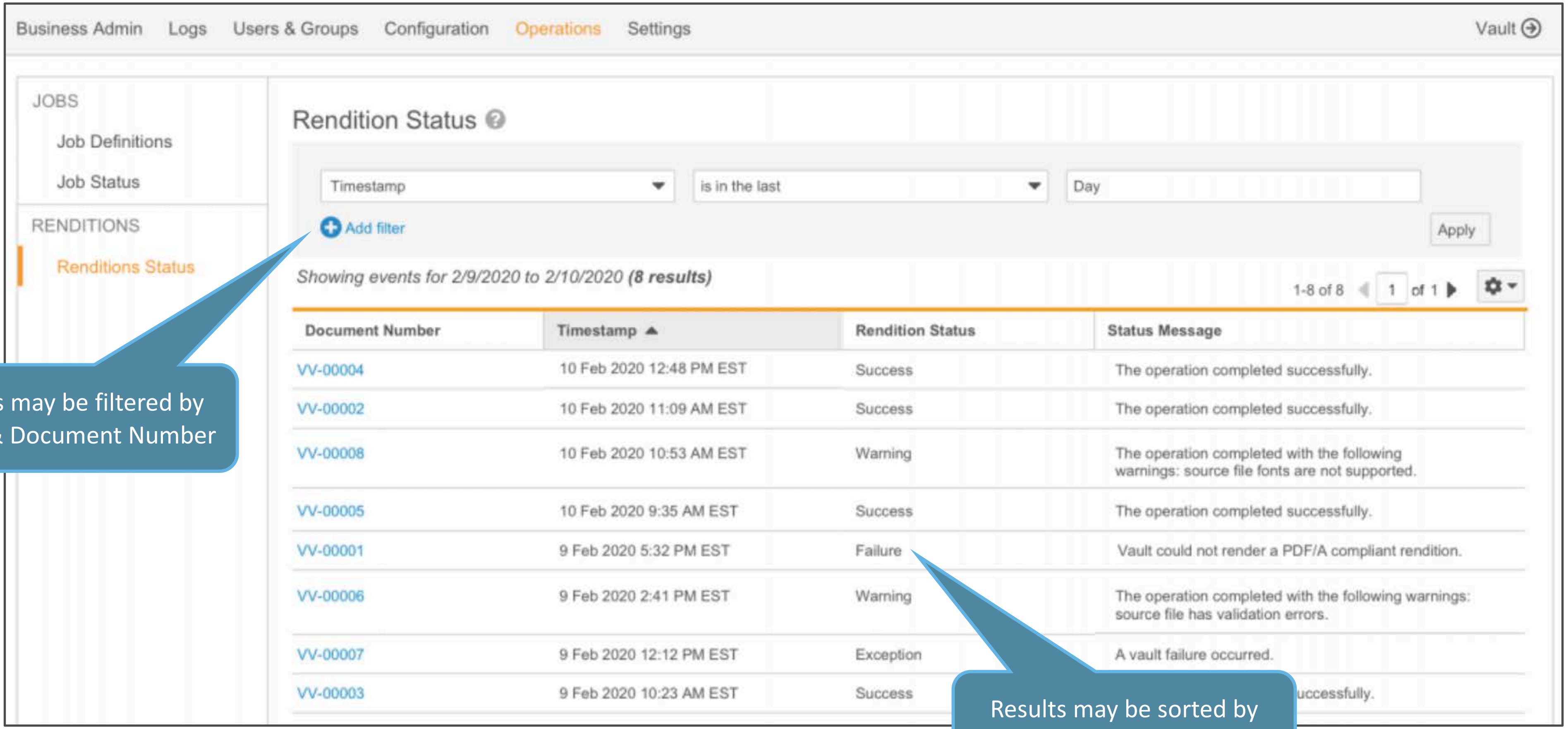


Flexible DAC mapping

- Considerations
  - Previously, document and object field names needed to match a User Role Setup field name in order to create a Dynamic Access Control (DAC) matching rule
  - Best practice is to use consistent field naming
- Use Case
  - Various fields on a document, such as Market, Affiliate or Country, reference the Country object. Sharing rules can now be created mapping the Country on the User Role Setup object to the Affiliate on a document

Rendition Status

- Overview
  - Admins can now view, filter, and troubleshoot document rendering issues by accessing the new Rendition Status page from the Operations tab

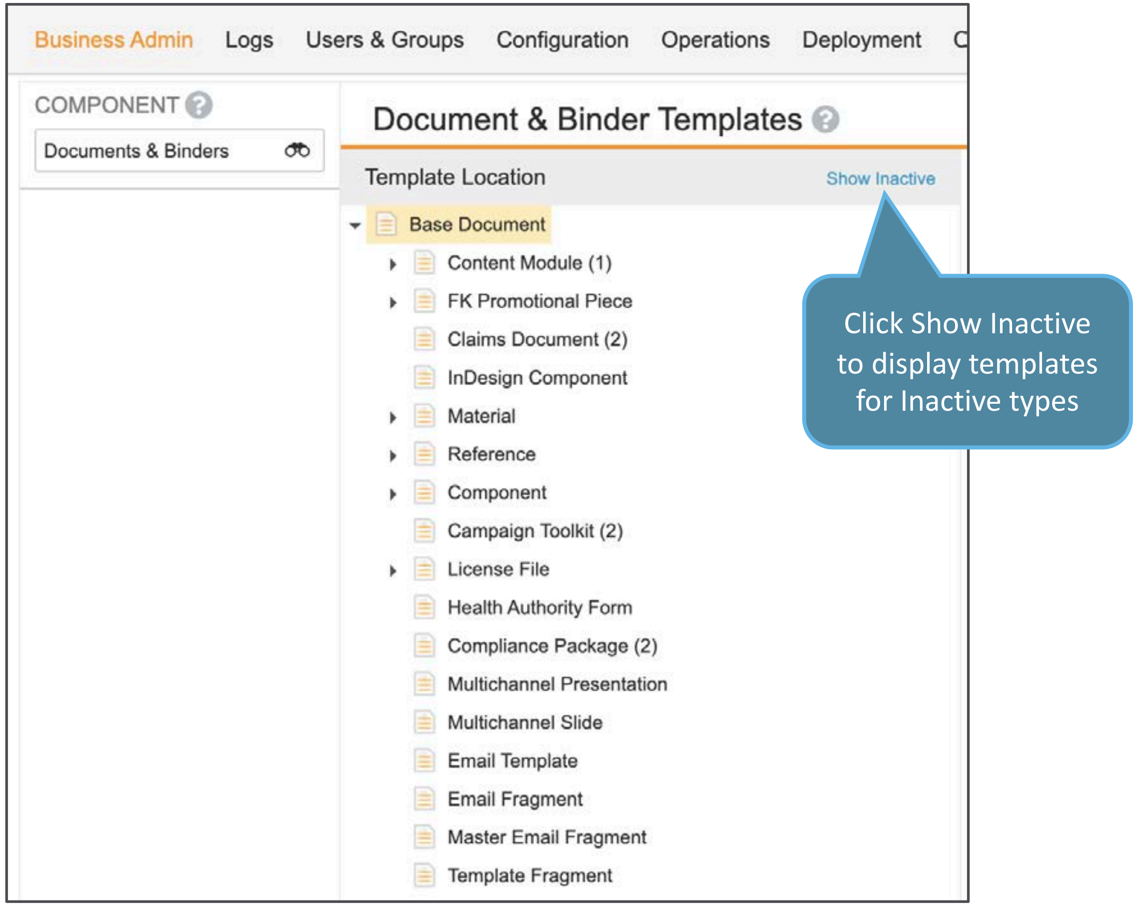


Results may be filtered by status & Document Number

Results may be sorted by clicking the column headers

Templates: Hide Inactive Document Types

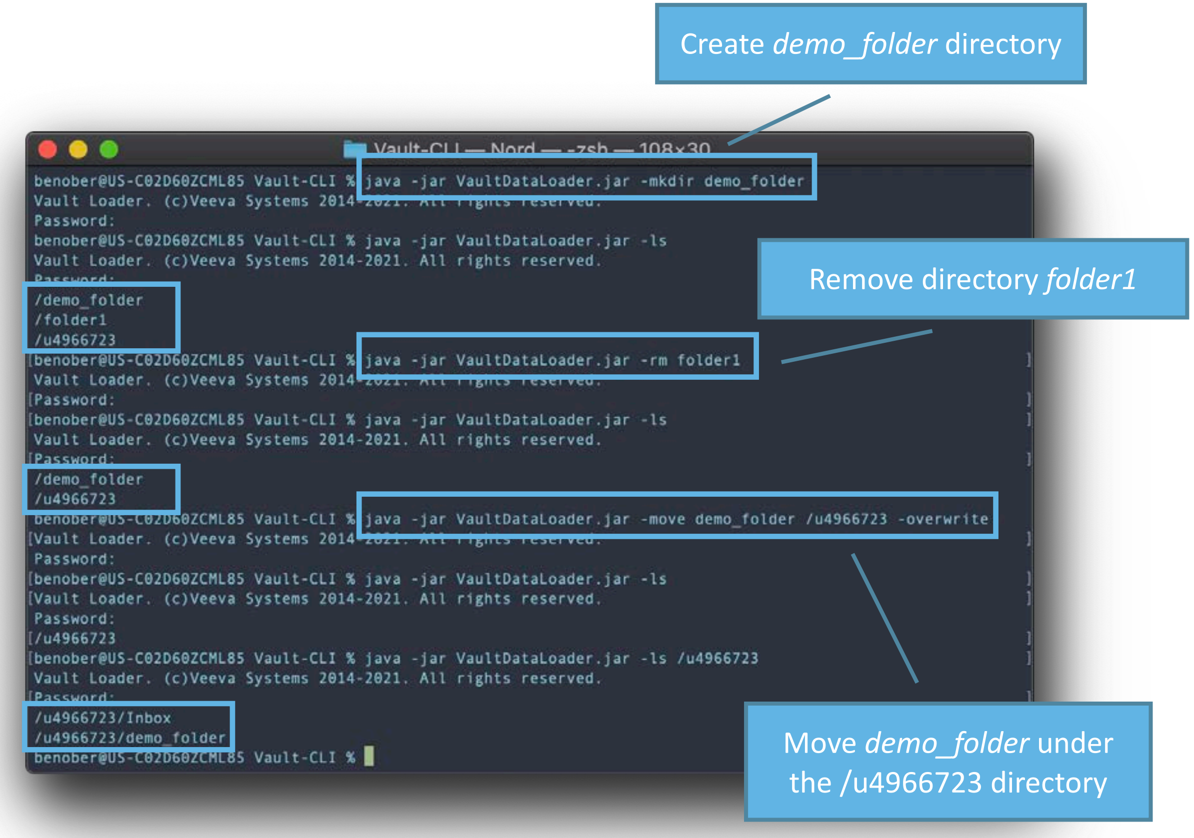
- Overview
  - The default display for Document and Binder Templates no longer includes inactive templates on the Business Admin screen
  - Admins will need to click the *Show Inactive* button to view inactive templates



Vault Loader

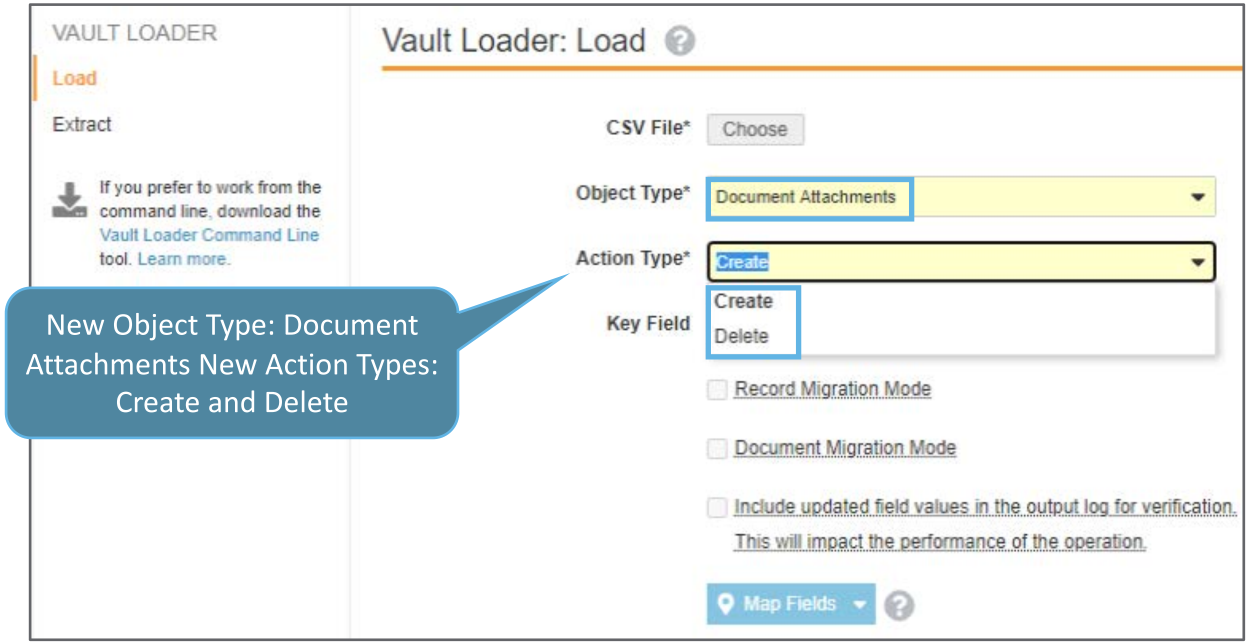
File Staging for Vault Loader CLI

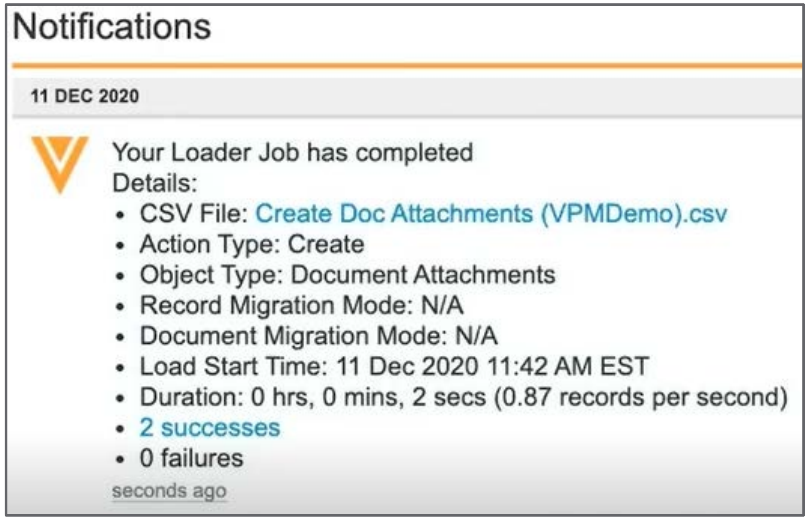
- Overview
  - Vault Loader Command Line tool users now have the ability to:
    - Create, move and delete files and folders on the staging server from the CLI utility, empowering user to manage Staged areas without the need to use API calls
    - View directories and files, create new folders, or delete existing folders on their vault's file staging server using the Vault Loader CLI
- Considerations
  - Currently customers use FTP when they need to import and export large quantities of files or to load large files
  - May include documents, attachments, renditions, etc.
  - Additional details can be found [here]



Vault Loader:
Bulk Document Attachment Enhancements

- Overview
  - Vault Loader now supports the bulk creation and deletion of document attachments
  - In addition, this feature adds support for the extraction of document attachment relationships





  - To Create document attachments using Loader the CSV file must have these input fields

	A	B	C	D	E	F	G
1	document_id__v	filename__v	file	description__v	major_version_number__v	minor_version_number__v	external_id__v
2	39	Gludacta-Flyer.docx	/u10001400/Gludacta-2021/Gludacta-Flyer.docx	Gludacta patient brochure	0	1	62714
3							

Vault Loader:
Bulk Document Attachment Enhancements

- Considerations
  - These enhancements apply to version-specific attachments and document level attachments
  - To delete document attachments using Loader the CSV file ID field

	A	B
1	id	
2	6	
3	7	

- Learn more about managing document attachments with Vault Loader
  - Example CSV file with field inputs for Creating document attachments
  - Example CSV file with field inputs for Deleting document attachments

Vault Loader: Bulk Object Attachments Support

- Overview
  - Vault Loader allows you to bulk create object record attachments if attachments are enabled for that object type
  - If the attachment already exists, Vault uploads the attachment as a new version of the existing attachment
- Use Case
  - User uploads content to the Staging Area
  - Create supporting CSV
  - Go to Loader > Load > Select Object Type > Action Type : Create Attachments
  - Optional: Map fields on load CSV to object records

Vault Loader: Export Usability Enhancements

- Overview
  - The Vault Loader Extract UI has been enhanced with preset column selection filters and the Where Clause token helper columns/fields values is expanded

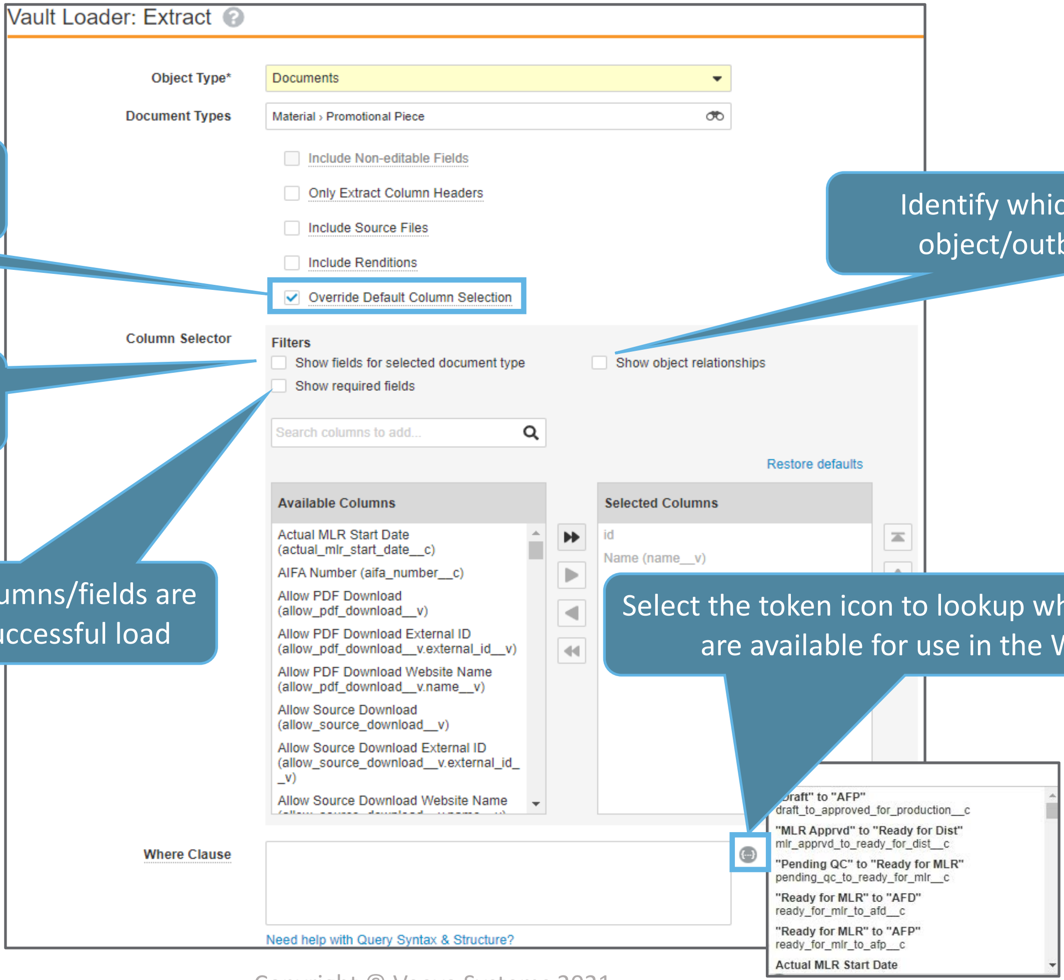
Use the Override Default Column Selection checkbox to enable the column selector

Identify which columns/fields are object/outbound relationships

Identify which columns/fields are related to a selected document type

Identify which columns/fields are required for a successful load

Select the token icon to lookup which columns/fields are available for use in the Where Clause

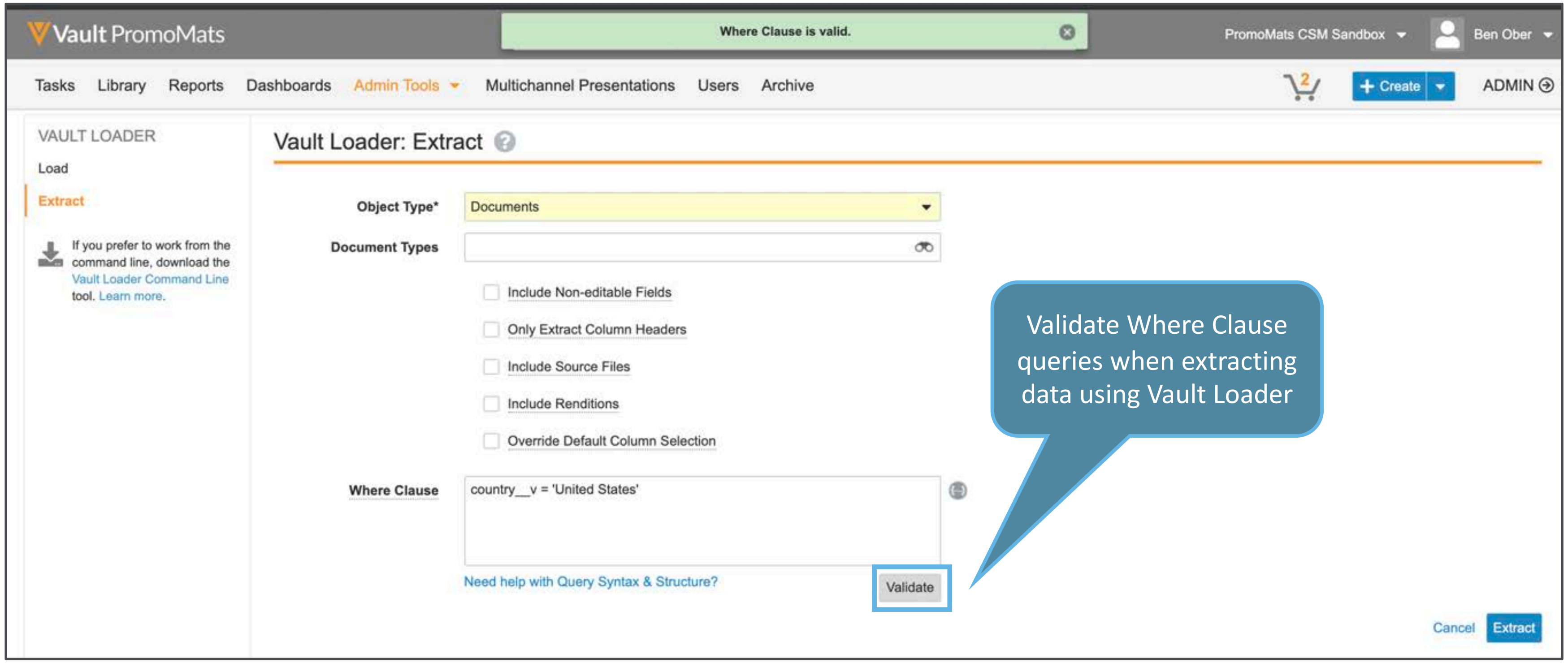


Vault Loader: Export Usability Enhancements

- Considerations
  - This enhancement applies to Documents, Document relationships, and Document Versions, VOF Objects, and Legacy User extractions
- Learn more about extracting metadata and files with Vault Loader

Vault Loader: Where Clause Validation

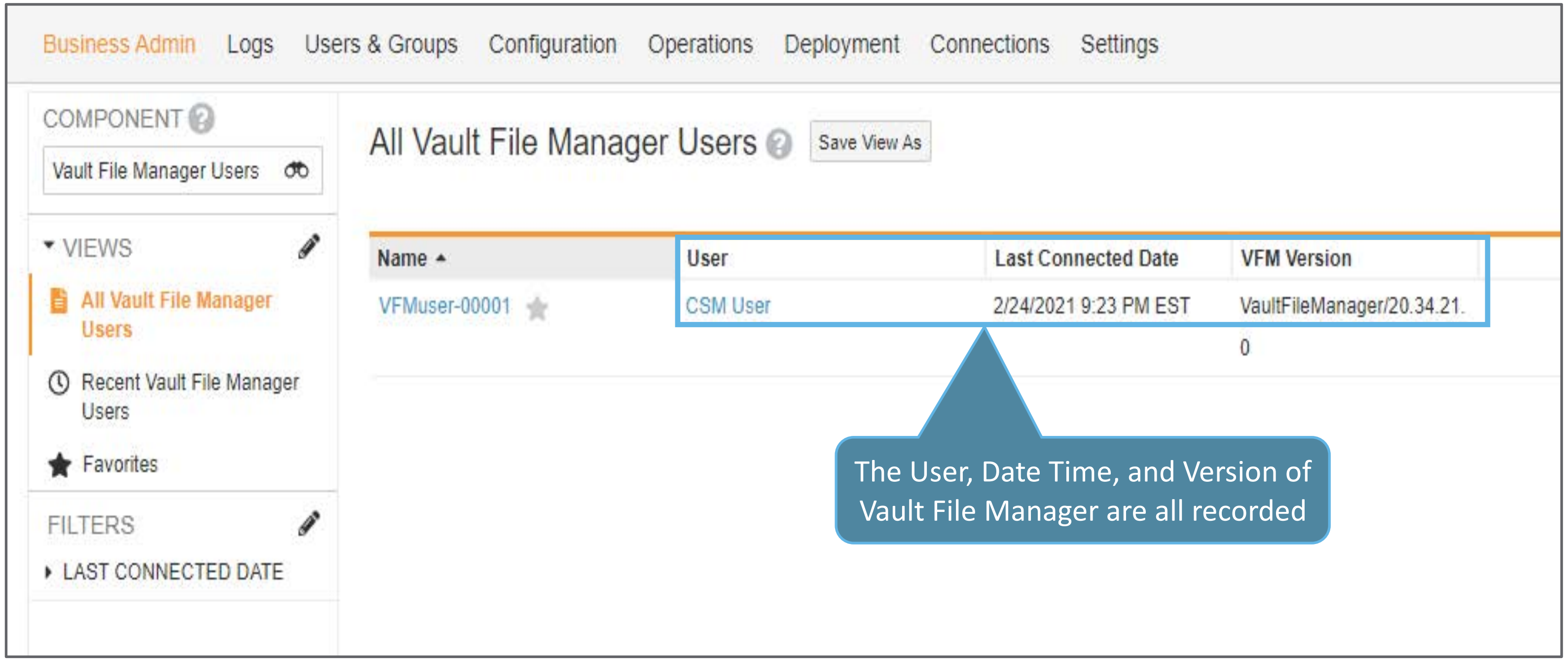
- Overview
  - The Extract screen for Vault Loader now includes a Validate button to validate query syntax is correct prior to initiating an extraction job
  - User were not notified of syntax errors until executing the job and reviewing the job failure message



Objects

Track User, Machine & Vault File Manager Version

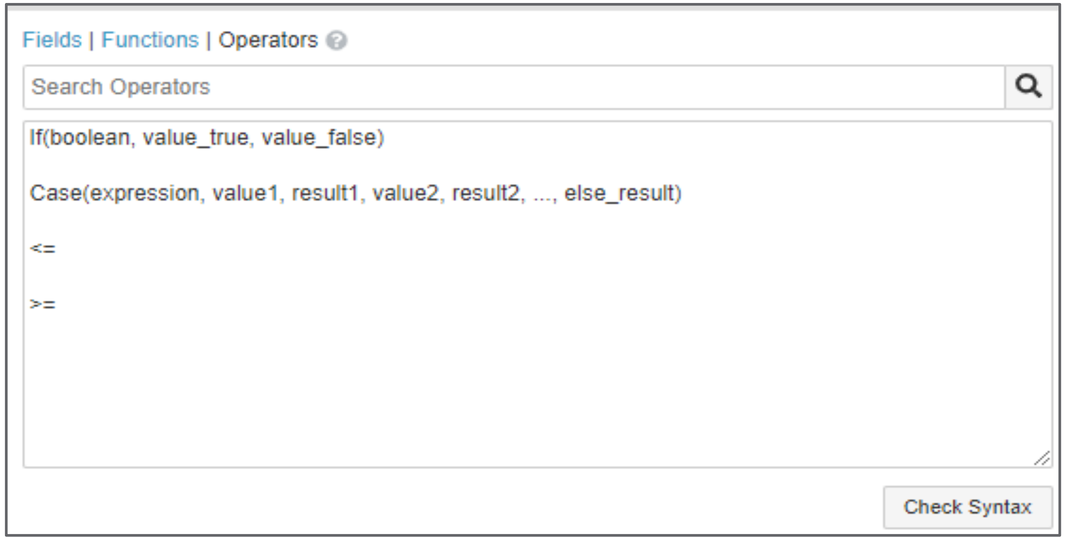
- Overview
  - There is a new Standard object called Vault File Manager Users that lets you report on which users are using the file manager



- Use Case
  - Organizations can leverage this feature to monitor who is logging into Vault File Manager and connecting to your Vault

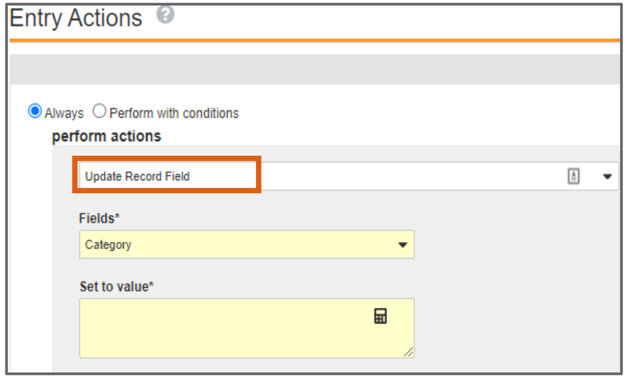
Object Lifecycle & Workflow: Expression Enhancement

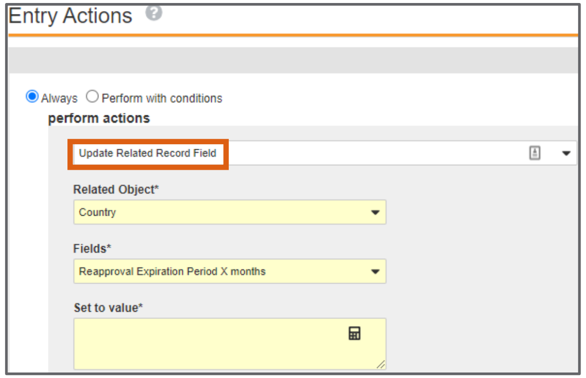
- Overview
  - Object Lifecycles now supports additional conditions, functions and operators in the Entry Action and Event Actions, and the Update Record/Related Record Actions
  - Object Workflows now supports additional conditions, functions and operators in the Workflow Update Record Field and Update Related Record Field step
  - For example,
    - Functions such as If and Case
    - Operators such as >= (greater than or equal to) and <= (less than or equal to)
- Considerations
  - Lookup fields cannot be used in Event actions
- Learn more about expression support in the [Vault Formula Reference Guide]



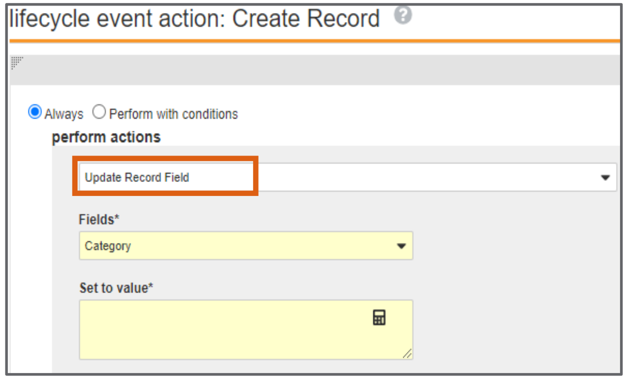
Object Lifecycle & Workflow: Expression Enhancement

- Configuration
  - Lifecycle
    - Admin > Configuration > Object Lifecycle > {Lifecycle} > {State} > Entry Action > Edit

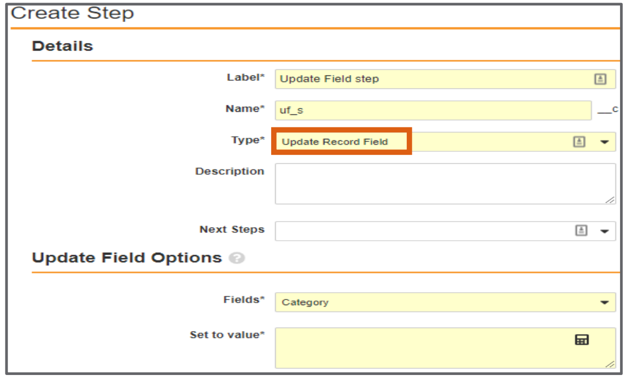


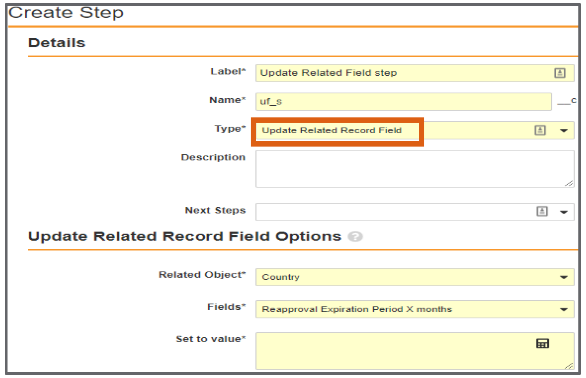


    - Admin > Configuration > Object Lifecycle > {Lifecycle} > {State} > Event Actions > Create Record



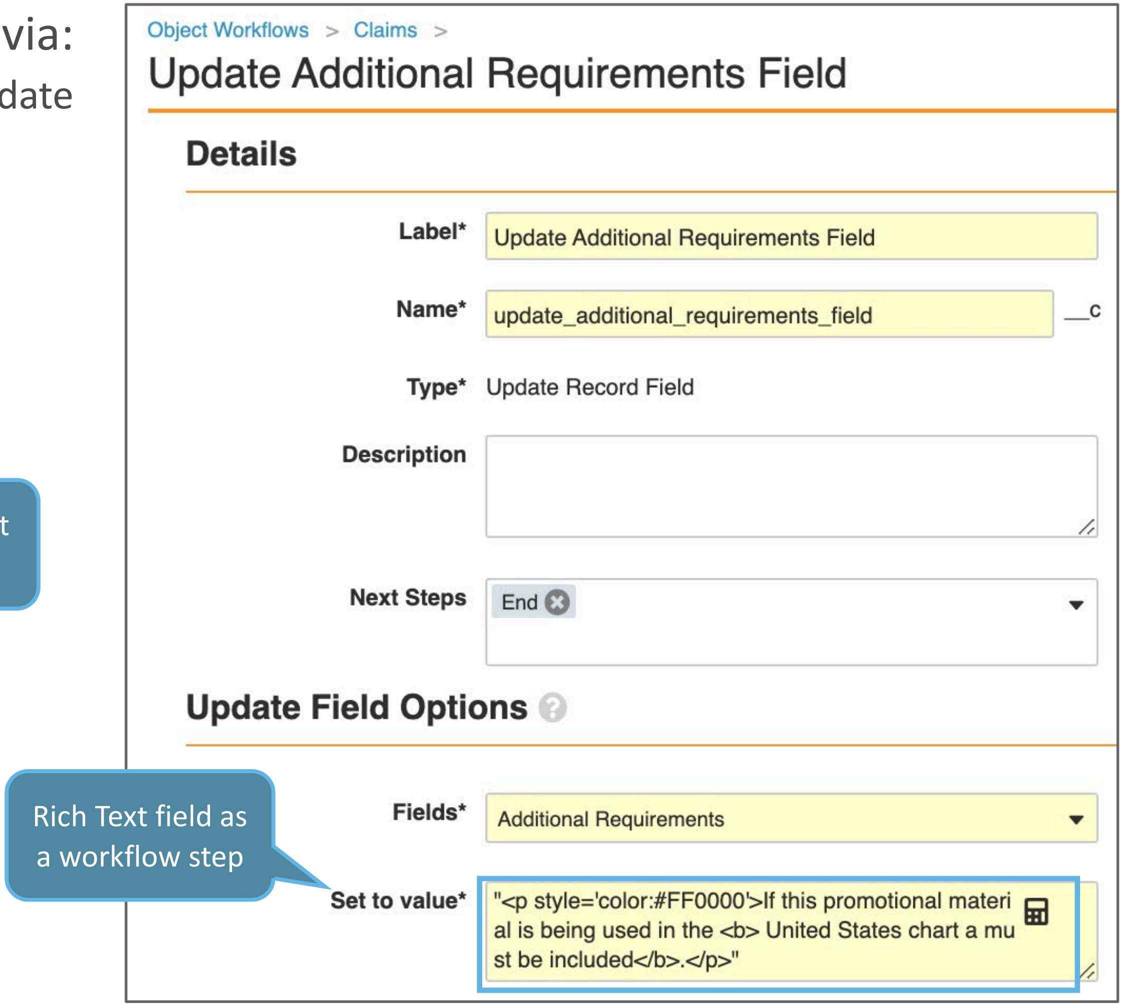
  - Workflows
    - Admin > Configuration > Object Workflows > {Workflow} > Edit > Create Step





Object Lifecycle & Workflow: Long Text & Rich Text Fields

- Overview
  - Rich Text and Long Text fields on object lifecycle and workflow components
  - Vault can update Rich Text and Long Text fields via:
    - Entry actions, such as Update Record Field and Update Related Record Field
    - Event actions, such as Update Record Field
    - Workflow steps, such as Update Record Field and Update Related Record Field



Object Lifecycle & Workflow: Long Text & Rich Text Fields

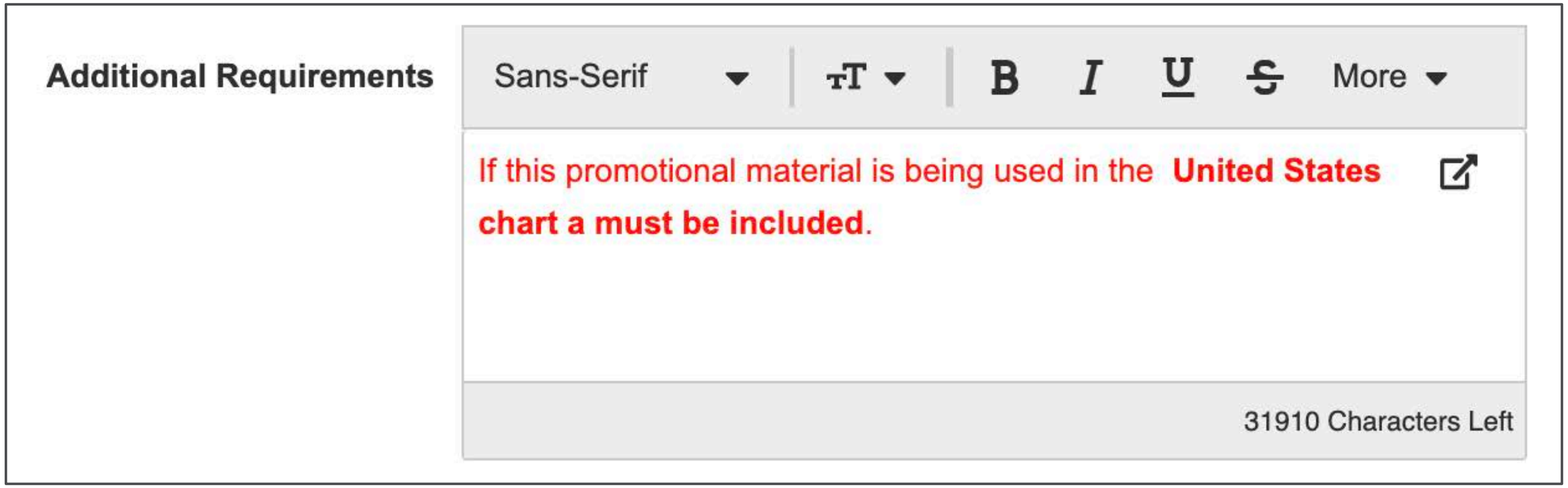
- Considerations
  - Both Rich Text and Long Text fields are available in field prompts for workflow Task steps
  - Rich Text fields are also available in action conditions

Details

Name	CL-000063	**Last Modified By**	System
Country	United States	**Last Modified Date**	3/5/2021 1:12 AM EST
Product	Cholecap	**Status**	Active
Category	Indication	**Headline**	
Lifecycle	Claims Lifecycle	**Notes**	
Lifecycle State	Approved	**URL**	
Match Text	Clinically proven efficacy and safety in pediatric patients	**Source Claim (Claim Copied)**	
		Claim Risk	Low
Created By	Maria Ruoto	**Additional Requirements**	If this promotional material is being used in the **United States chart a must be included**.
Created Date	3/5/2021 12:24 AM EST		

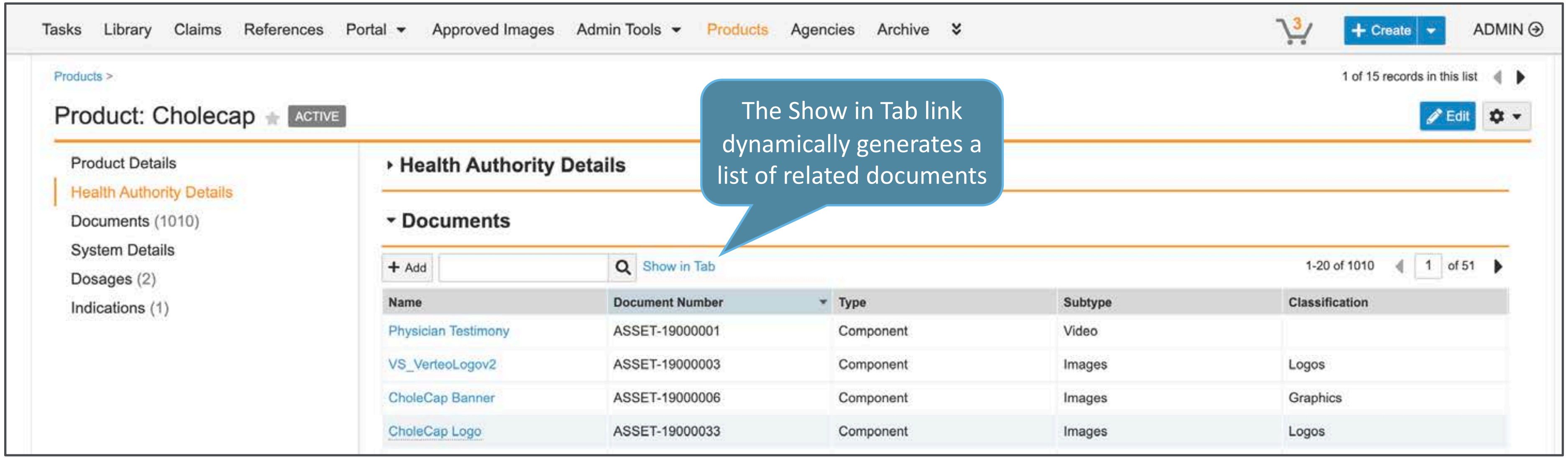
Rich Text Fields for Vault Objects

- Overview
  - Users can now format the content of field values with Rich Text fields
  - Vault supports most common formatting options such as font size, font family, text alignment, text decorations, lists, and scientific notation
  - Admins can configure Rich Text fields in most places that support text fields
- Use Case
  - Can be used on objects such as Auto Claims records for emphasis



Show in Tab for Related Document Section

- Overview
  - We have renamed the Show in Library link in related document sections of object records to Show in Tab
  - Clicking on the link opens the list of related documents in a dynamically-generated list of related documents



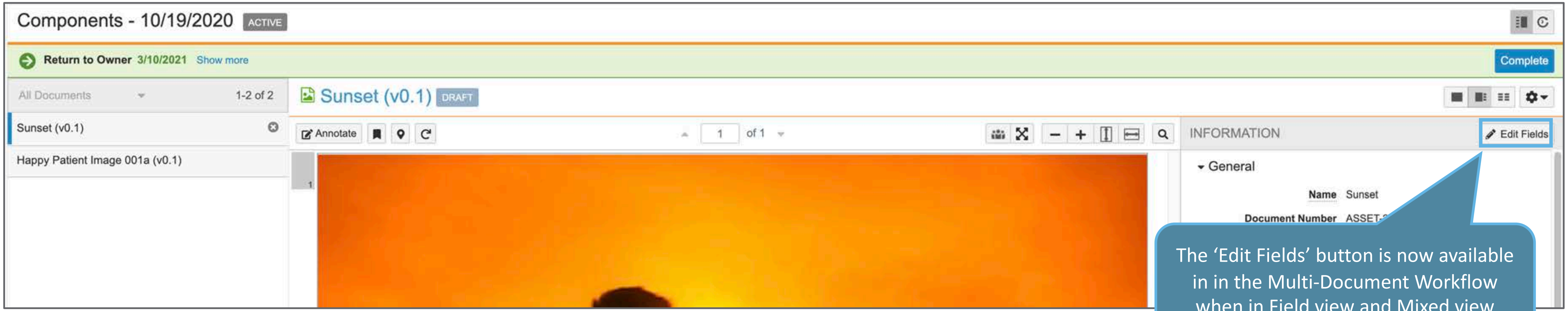
- Considerations
  - Previously, the link opened the Library tab. This change resolves an issue where users who did not have access to the Library tab were redirected to the Home tab instead

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

Multi-Document Workflow: Edit Document Fields

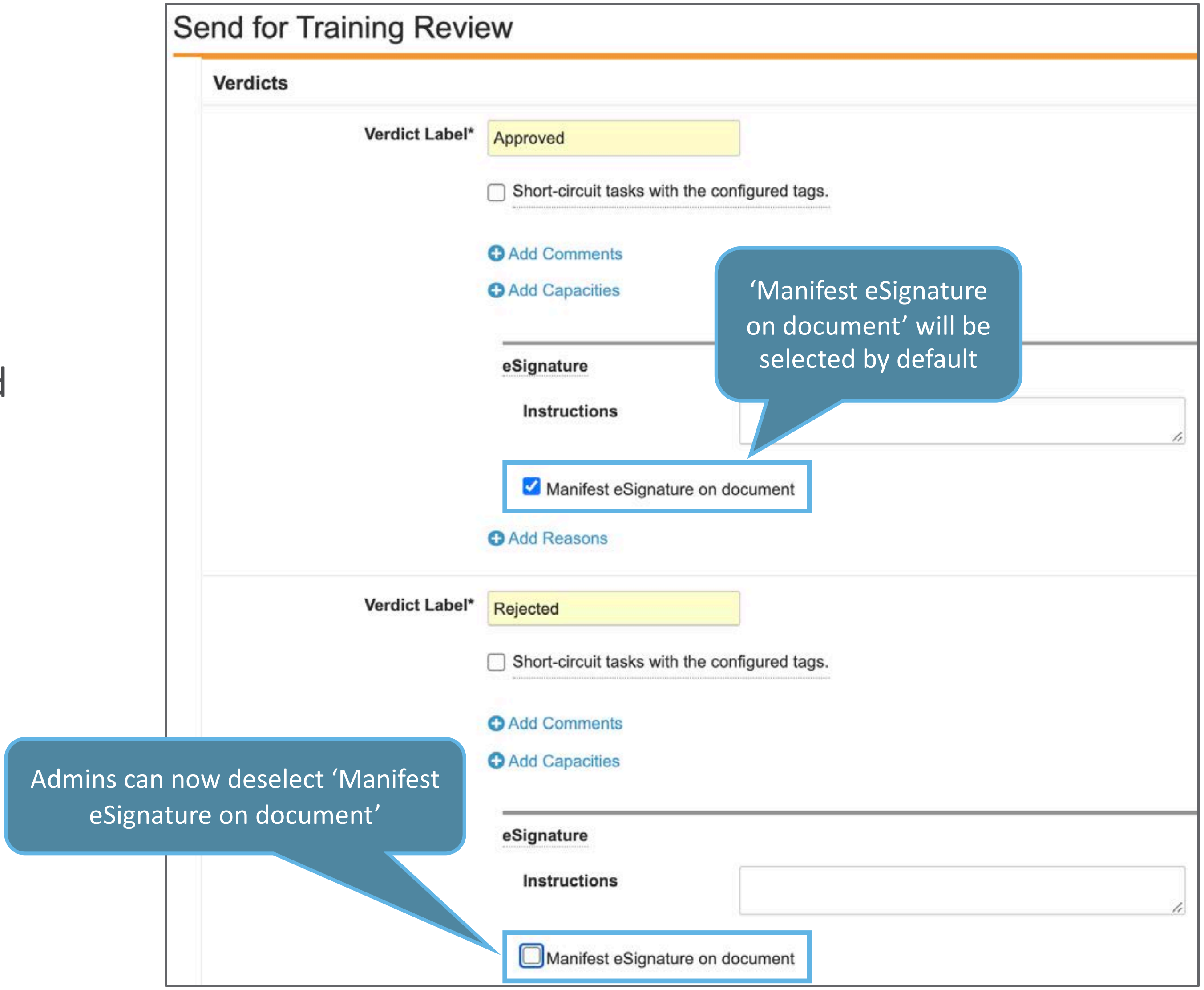
- Overview
  - Users with appropriate permissions can now edit document fields within the Multi-Document Workflow viewer rather than having to open individual documents
- Considerations
  - The Edit Fields button is available in both Field View and Mixed View
  - Only fields on the document you have selected will be edited



The 'Edit Fields' button is now available in in the Multi-Document Workflow when in Field view and Mixed view

Multi-Document Workflow: Optional eSignature Manifesting on Documents

- Overview
  - Admins can now configure whether eSignatures will be manifested on the signature page attached to downloaded documents in a Multi-Document Workflow
- Considerations
  - 'Manifest eSignatures' will be selected by default
    - This option can differ between multiple verdicts – only the signatures for verdicts with 'Manifest eSignature on Documents' enabled are manifested



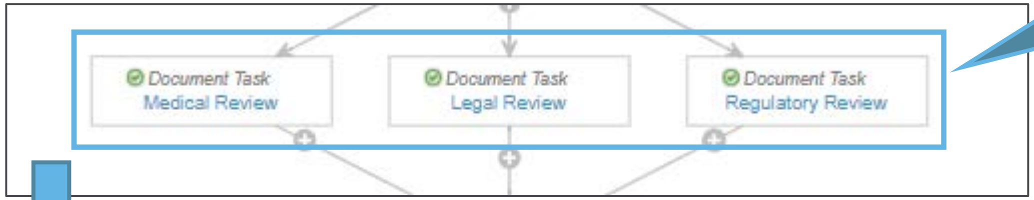
Multi-Document Workflow: Short Circuit Tasks

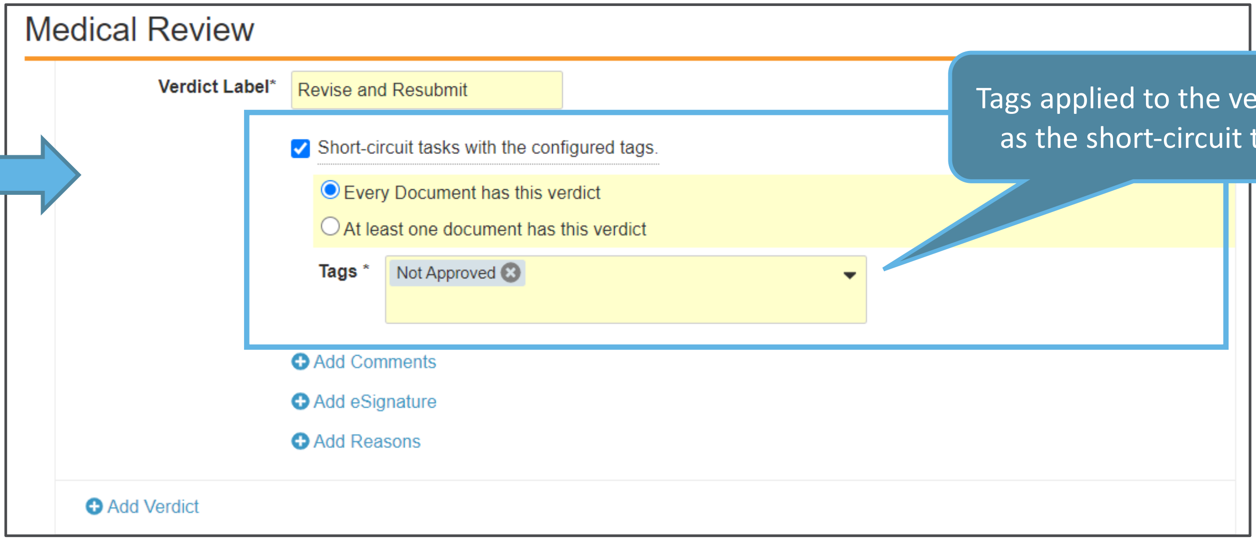
- Overview
  - Admins can now configure Short Circuit Tasks in Multi-Document Workflows with matching tags
  - This feature automatically cancels all pending tasks with a matching tag, including parallel tasks, when a short circuit verdict is provided
- Considerations
  - Short circuit verdicts can be configured on both single-verdict and multi-verdict tasks on both Any Lifecycle and Specific Lifecycle Multi-Document Workflows
  - There is no change to Single Document Workflows
  - Short-circuiting only cancels TASKS, not the actual workflow, meaning documents will progress through the remaining workflow steps
- Use Case
  - If a Document has a ‘Rejected’ verdict applied by the Medical Reviewer, this feature allows for the Legal and Regulatory tasks to be cancelled automatically. This ensures time is not wasted on a task when the document is going back to draft to be revised by the Document Owner anyway

Multi-Document Workflow: Short Circuit Tasks

- Configuration
  - Admin > Configuration > Multi-Document Workflow > [Multi-Document Workflow] > Document Task Step

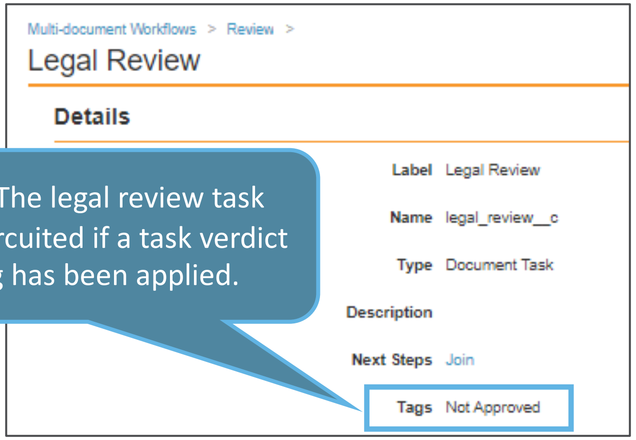
Tags must be added across all Document Tasks in order to allow for Short Circuiting on parallel tasks





Tags applied to the verdict act as the short-circuit trigger.

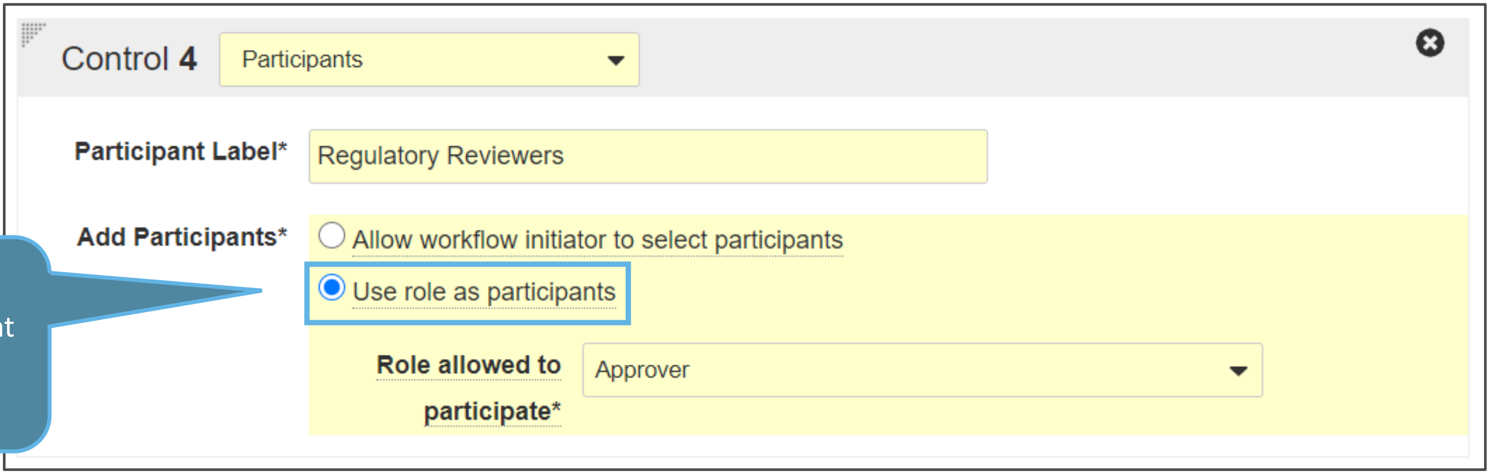
For example: The legal review task will get short-circuited if a task verdict with this tag has been applied.



Multi-Document Workflow: Use Role as Participants

- Overview
  - This enhancement to Multi-Document Workflows allows Participant groups to automatically select workflow users based on their roles
    - For example, a participant group can consist of users in the Approver role and would mean this automatically adds all users who have the Approver role on every document in the workflow as participants in the workflow
- Use Case
  - Enables you to use roles to automatically define the list of users in a participant group without manual intervention by the workflow initiator

The option to use roles as participants in the participant control of the start step of Multi-Document Workflow

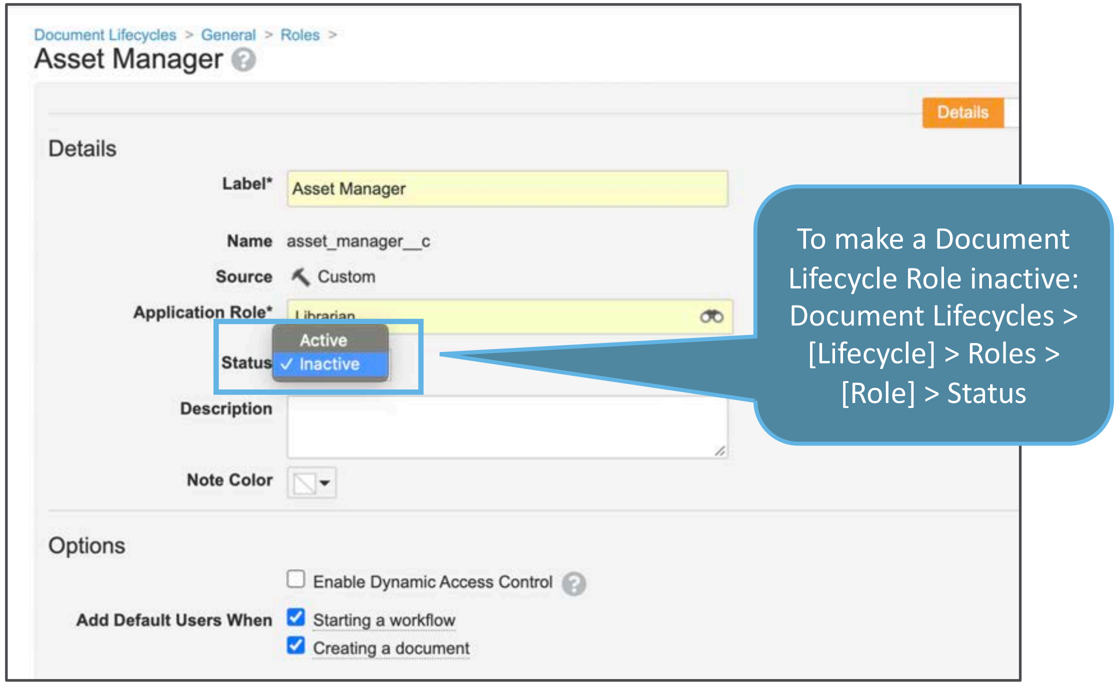


Multi-Document Workflow: Use Role as Participants

- Considerations
  - Admins can only select one role per participant group to include
  - Vault does not currently support exclusion-based roles
  - Users/groups are assigned based on the roles when tasks are created. The user must be in that role in every document
  - Additional users/groups added after task creation can only be added using ‘Add Participants’ and not automatically
- Configuration
  - Admin > Configuration > Multi-Document Workflows > [Select Multi-Document Workflow] > Start Step > Participants Control

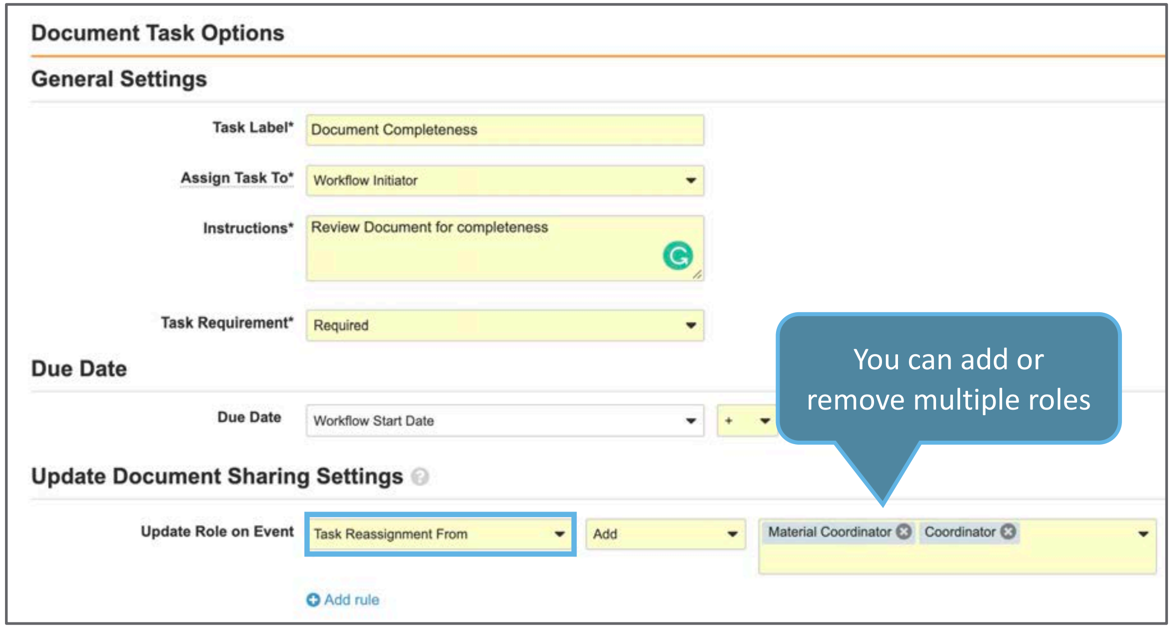
Inactivate Roles Used in Multi-Document Workflows

- Overview
  - Admins can now make Document Lifecycle Roles used in Multi-Document Workflow Start, Notification, and Sharing Settings steps inactive
- Considerations
  - Once made inactive, the role cannot be used:
    - In new participant groups as a constraining role or in role-based Participant controls
    - As notification recipients or participants when updating sharing settings
  - There will not be any impact to already existing Multi-Document Workflows
  - If the Document Lifecycle Role is used in a Document Workflow, it cannot be made inactive



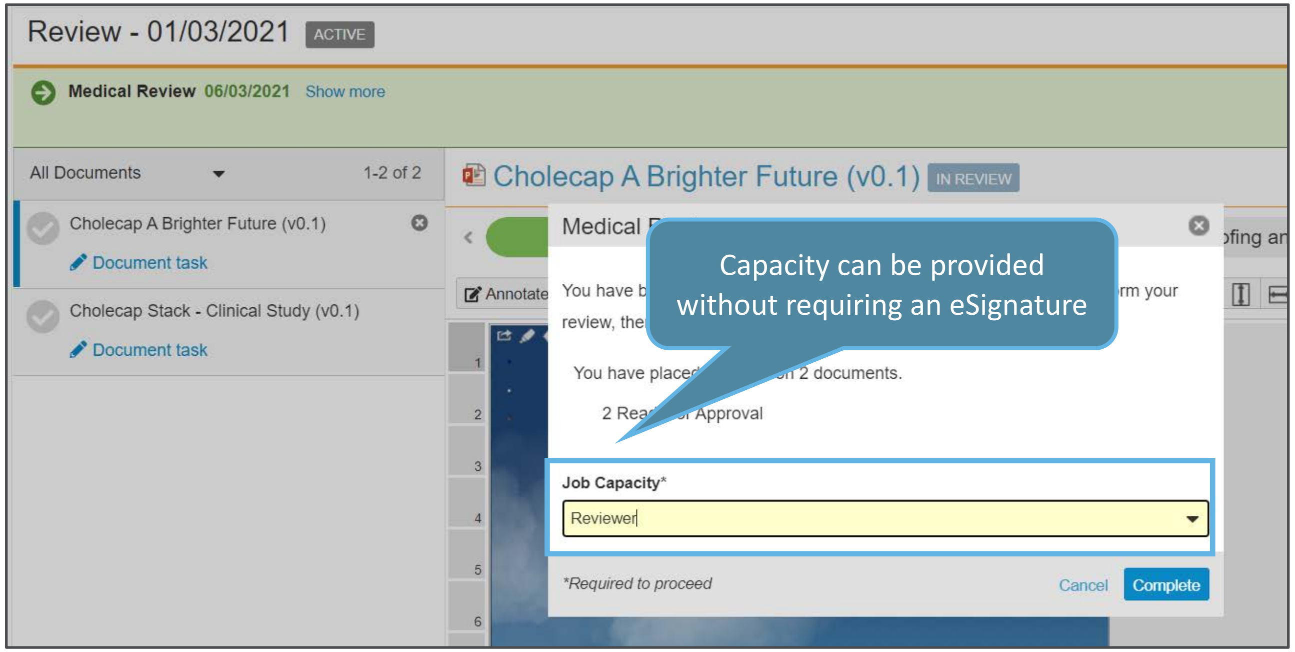
Object & Multi-Document Workflow: Reassignment Task Event in Update Sharing Settings

- Overview
  - Admins can now configure a ‘Task Reassignment From’ Task Event which will add or remove a user from a role on document or object sharing settings when the task is reassigned from that user
- Considerations
  - The Task Reassignment From event option updates the sharing settings of the user from which the task was reassigned, rather than the current task owner
  - Each triggering event can only affect a role once, preventing conflicting rule definitions
  - You can only select active roles
- Configuration
  - Admin > Multi-Document Workflows > [Workflow] > [Workflow Task Step] > Update Document Sharing Settings > Add Rule > Triggering Event > Select: Reassignment from Another User > Operator (Add/Remove) > Select Roles (select one or more roles affected by the rule)



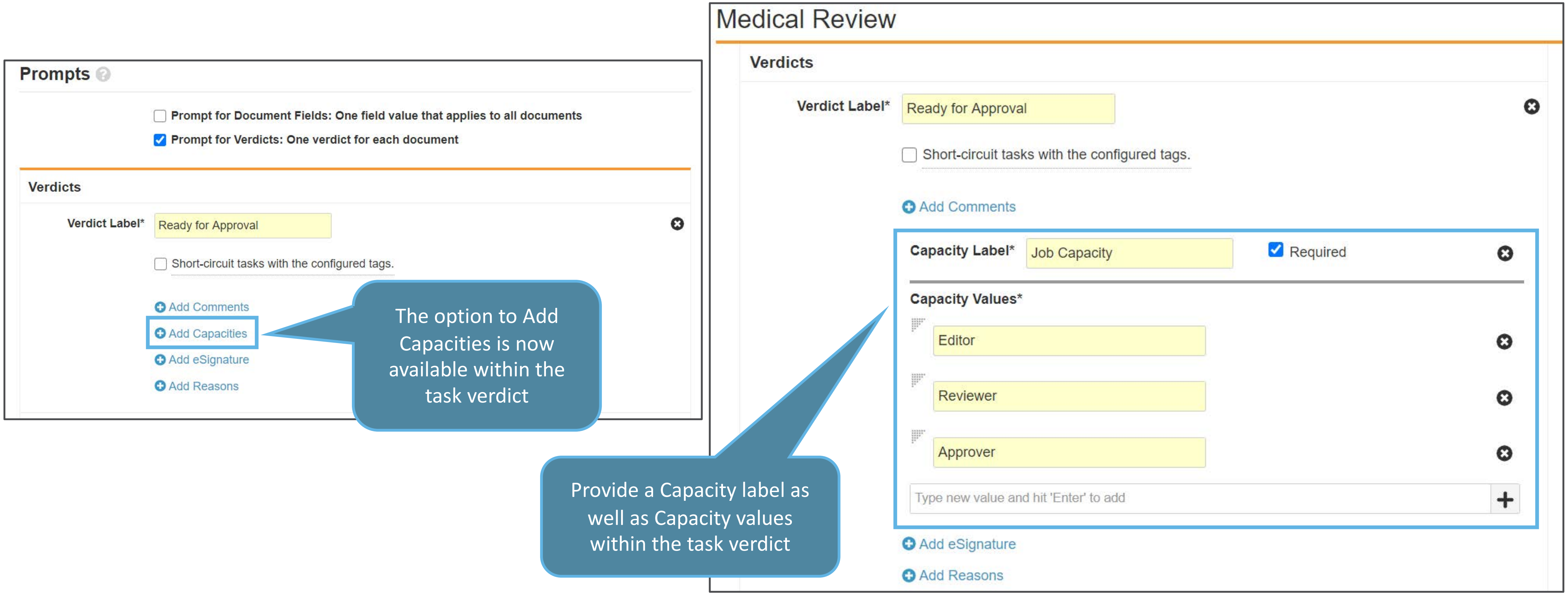
Object & Multi-Document Workflow: Capacity Without Requiring eSignature

- Overview
  - This feature allows Admins to configure tasks so that capacity can be provided with a task verdict without requiring an eSignature for both Object and Multi-Document Workflows
    - Previously it was only possible to provide a capacity with an eSignature
- Use Case
  - For documents which do not require an eSignature the user's capacity can be captured within the Task instead
- Considerations
  - There can be only one capacity value for each task completion
  - Capacities can be made required or optional



Object & Multi-Document Workflow: Capacity Without Requiring eSignature

- Configuration
  - MDW: Admin > Configuration > Multi-Document Workflow > [Select Multi-Document Workflow] > Document Task > Verdict
  - Object: Admin > Configuration > Object Workflow > [Select Object Workflow] > Workflow Task > Verdict



Object & Multi-Document Workflow: Replace Workflow Owner

- Overview
  - Using a new Replace Workflow Owner action, users with the appropriate permissions can now change the workflow owner of an active or in-progress workflow
    - Access to this action is controlled at the user profile level by a new ‘Replace Workflow Owner’ permission

The new Replace Workflow Owner action can be found here if the user has the required permissions

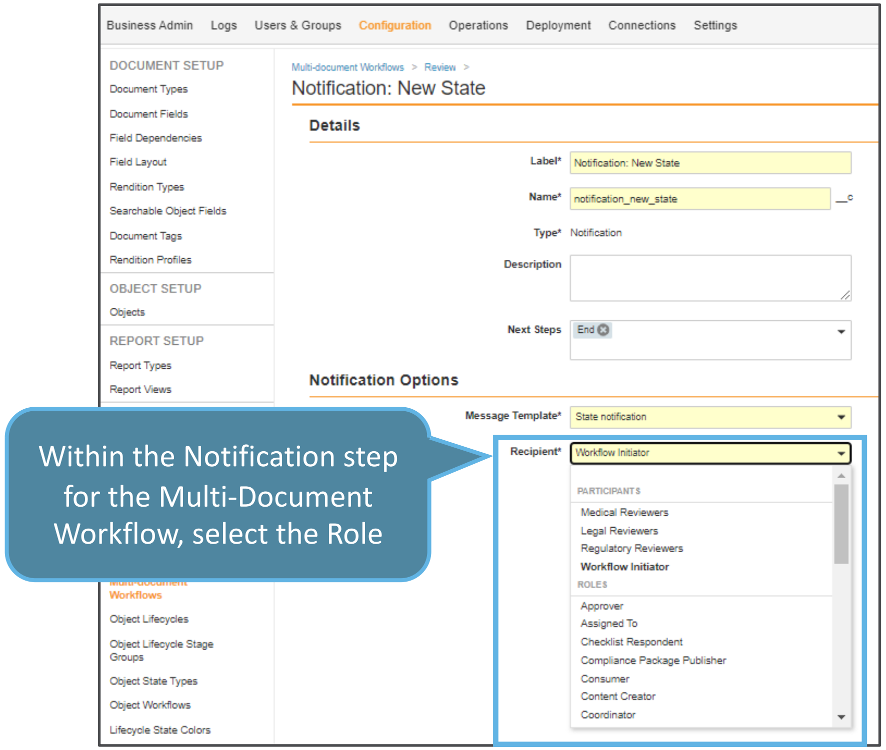
- Considerations
  - Workflow ownership can be changed through a workflow action in the Vault UI or by using the API
  - The new owner must have the permissions to start the workflow
  - When a user replaces the workflow owner, Vault automatically assigns all current and future incomplete tasks to the new owner
  - The ‘Replace Workflow Owner’ permission by default, is only available to Vault Owners, System Admins and Business Admins
  - This feature is only available for Object & Multi-Document Workflows

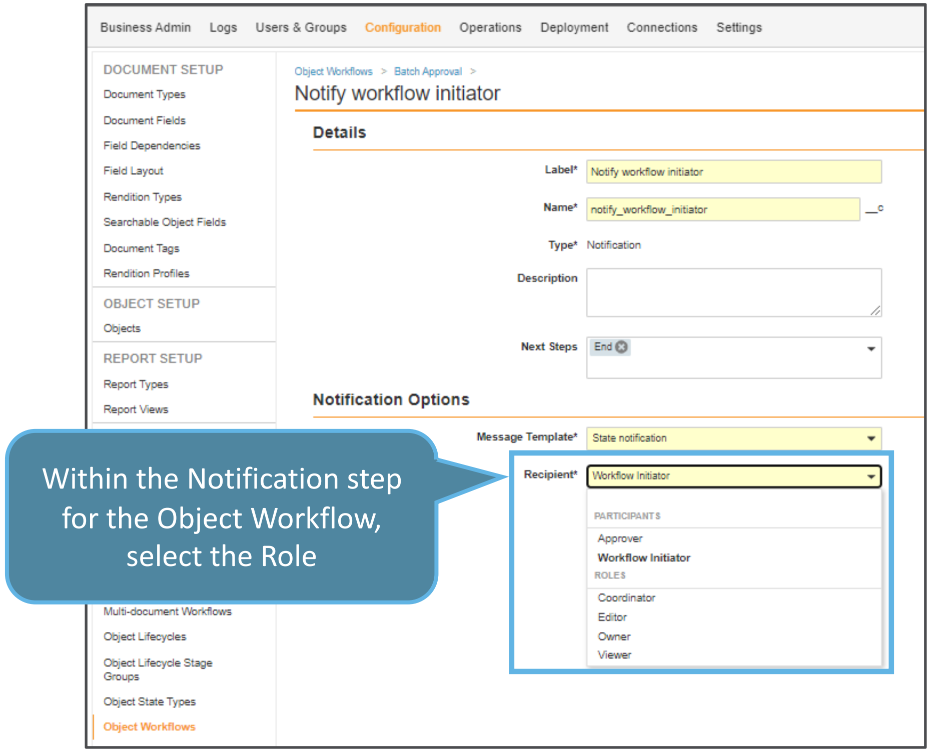
Object & Multi-Document Workflow: Send Notification Based on Roles

- Overview
  - Admins can now configure the notification step for both Object & Multi-Document Workflows to send notifications based on roles
    - Prior to 21R1 only participant group notifications were supported in Object & Multi-Document Workflows
- Considerations
  - Only one role is allowed per notification step
  - Notifications can be sent to Document Owners
  - Roles are Lifecycle roles or Application roles depending on Specific Lifecycle or Any Lifecycle Multi-Document Workflows
  - For Multi-Document Workflows, Vault sends the notification to users who are in that role on every document in that workflow
  - For Object Workflows, Vault sends the notification to users who are in that role in the object record's sharing settings

Object & Multi-Document Workflow: Send Notification Based on Roles

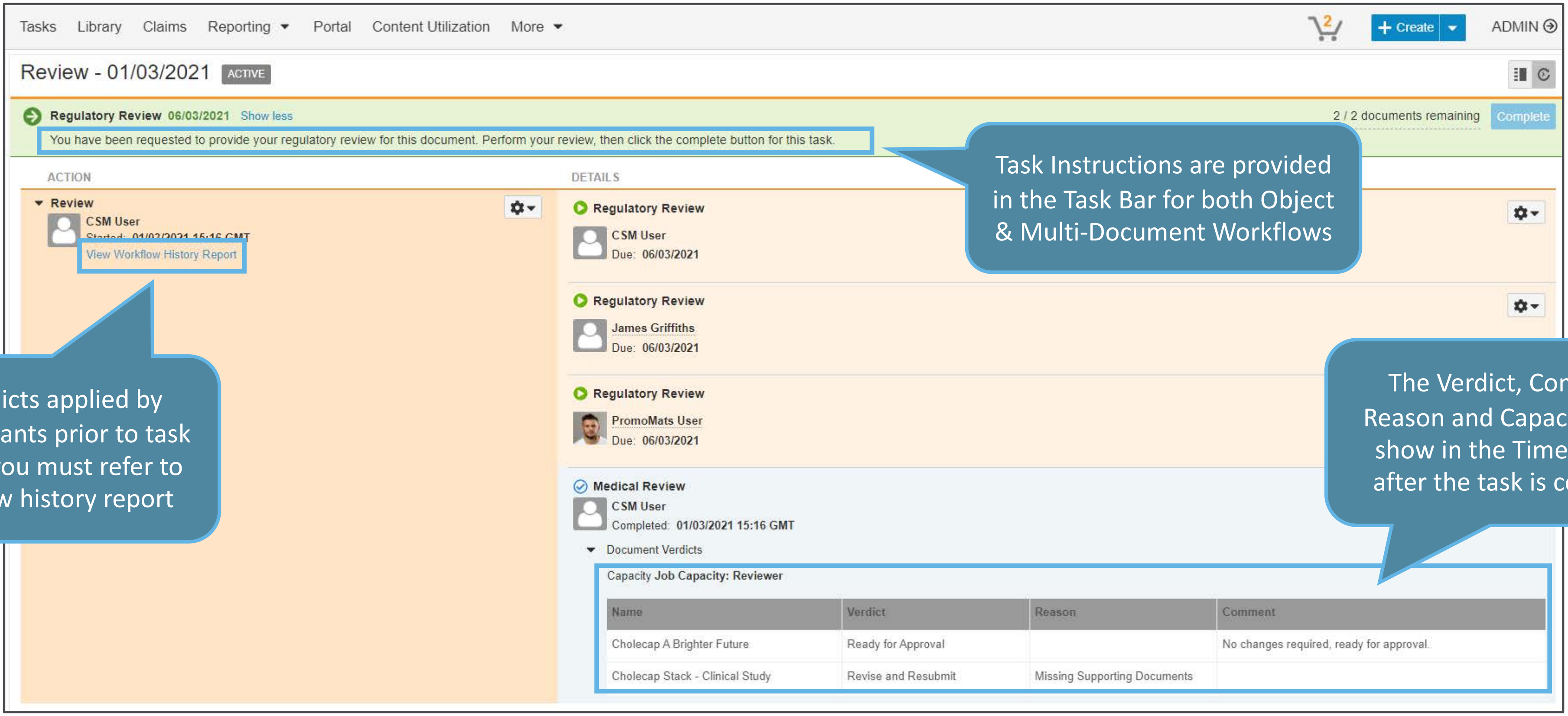
- Configuration
  - Vault Admins will need to select the roles in the recipient dropdown of the Notification Step
  - For Multi-Document Workflows: Admin > Multi-Document Workflows > [Select Multi-Document Workflow] > Notification Step
  - For Object Workflows: Admin > Object Workflows > [Select Object Workflow] > Notification Step





Object & Multi-Document Workflow: Timeline View & Task Bar Enhancements

- Overview
  - Verdict details are now available in the Timeline View of a Multi-Document Workflow
    - Including, the verdict, comments, reason and capacity
  - Vault also now shows task Instructions provided by the Workflow Initiator in the Task Bar for both Object and Multi-Document Workflows



Task Instructions are provided in the Task Bar for both Object & Multi-Document Workflows

To see verdicts applied by other participants prior to task completion you must refer to the workflow history report

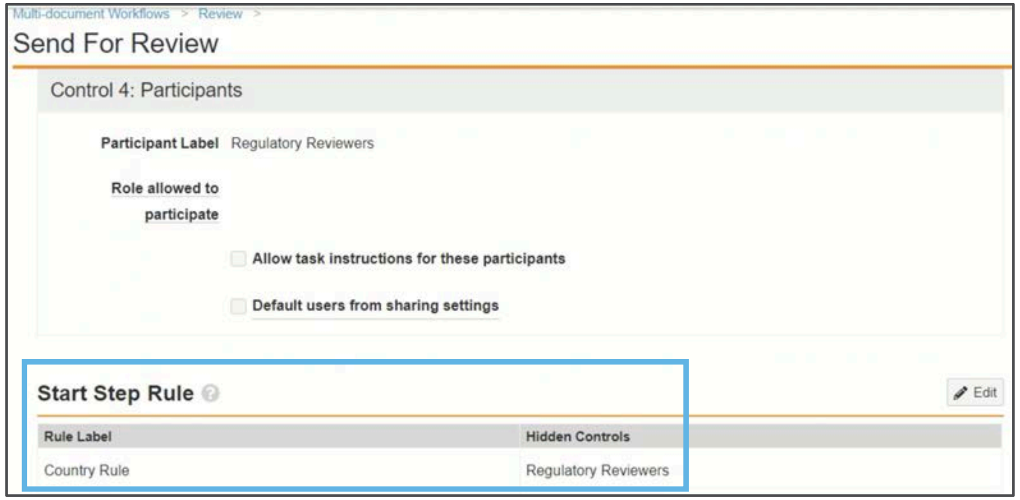
The Verdict, Comments, Reason and Capacity all now show in the Timeline View after the task is completed

Object & Multi-Document Workflow: Timeline View & Task Bar Enhancements

- Considerations
  - The verdict is shown only after the task is completed
  - Ad-hoc task instructions will be shown in Object & Multi-Document Workflows
  - By default, the verdict information table will appear collapsed
  - Each document in the MDW will be represented as a separate row in the table
  - The table will load up to 10 rows with additional rows loaded on scroll down
  - To see verdicts applied by other participants prior to task completion, you must refer to the workflow history report

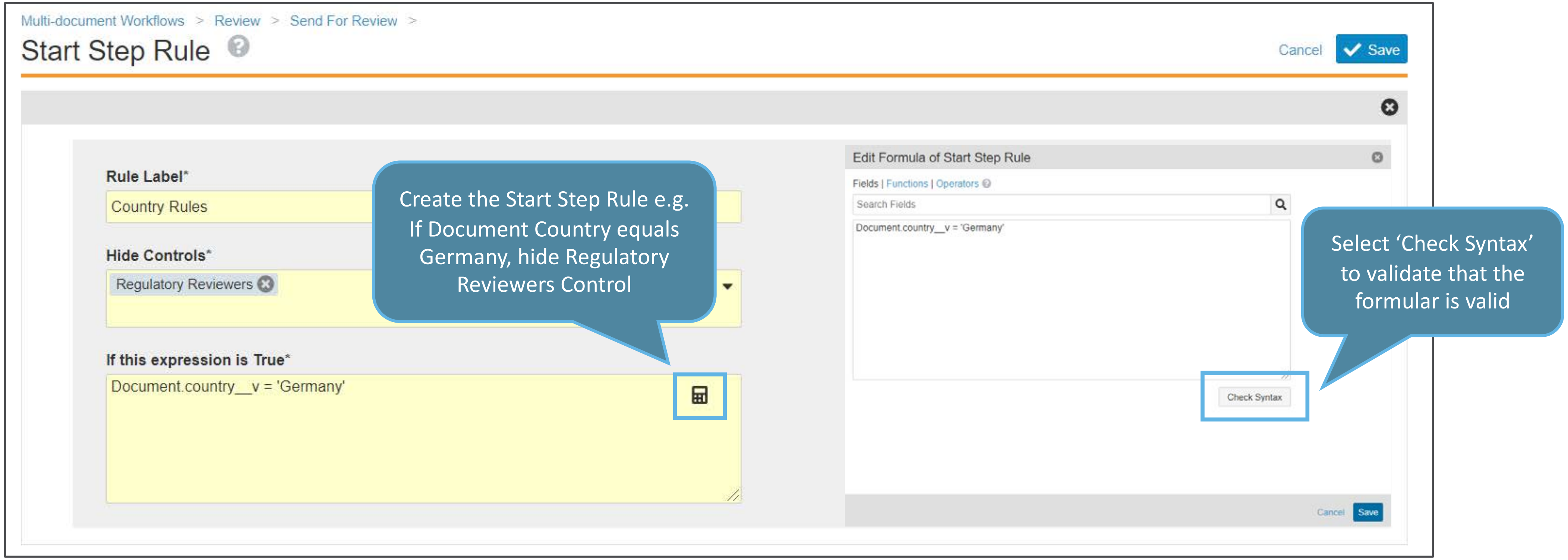
Object and Multi-Document Workflow: Conditional Controls on Start Step

- Overview
  - Workflow Admins can now configure Yes/No Boolean expressions on the Workflow Start Step to hide the Instructions, Participants, Date, Prompt for Fields, or Variable controls in the Workflow Start Dialogue in order to prevent the Workflow Initiator from seeing unnecessary controls
- Considerations
  - Only one rule is allowed but you can use different conditions in that rule
  - For Multi-Document Workflows, the rule has to be true for each document before for the controls to hide
  - If a required control is hidden, an error message will be displayed
  - This enables the same functionality as the advanced workflow role configuration for single document workflows
- Use Case
  - If you do not require a Regulatory Reviewer when the material is created for Germany, you can utilized this feature to hide that Role when starting the Multi-Document Workflow



Object and Multi-Document Workflow: Conditional Controls on Start Step

- Configuration
  - For Multi-Document Workflows: Admin > Configuration > Multi-Document Workflow > [Select Multi-Document Workflow] > Start Step > Start Step Rule > Edit
  - For Object Workflows: Admin > Configuration>Object Workflow> [Select Object Workflow] > Start Step > Start Step Rule > Edit



Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 21R1 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/

Veeva & U

Your Community for Digital Excellence

Digital Engagement Is Here to Stay

86%
More Content Produced
compared to the past six months

+891%
Engage Meetings Started
19 minutes average meetings duration

+600%
Approved Emails Sent
37% average open rate

Source: Veeva Pulse Data

Drive Digital Excellence in Your Company

9,400+
Life Sciences Professionals

200+
Life Sciences Companies

Educational Webinars
Learn tips and tricks, best practices, and industry trends

Customer Exchanges
Collaborate and connect with commercial and medical colleagues

Local Community Forums
Explore local market trends and topics

Commercial and Medical Hub
Access resources and be the first to hear upcoming innovation

21R1 Release Developer Webinar

April 8, 2021 – Register here

Java SDK & Integrations

- Notification Template SDK
- Record UI Action Enhancements
- SDK Job Queues
- Deprecate VaultRuntimeException
- User Exception Record Save in Message Processors

API & VQL

- API Burst and Daily Limit Changes
- Job API Enhancements
- Workflow API Enhancements
- Log the Global ID in Deleted Document API
- Document ID included in Audit History CSV
- VQL Clause Enhancements
- Rich Text Fields for Vault Objects
- Query Documents with Roles
- Alias Support

Vault Loader

- Where Clause Validation
- File Staging Command Line Interface

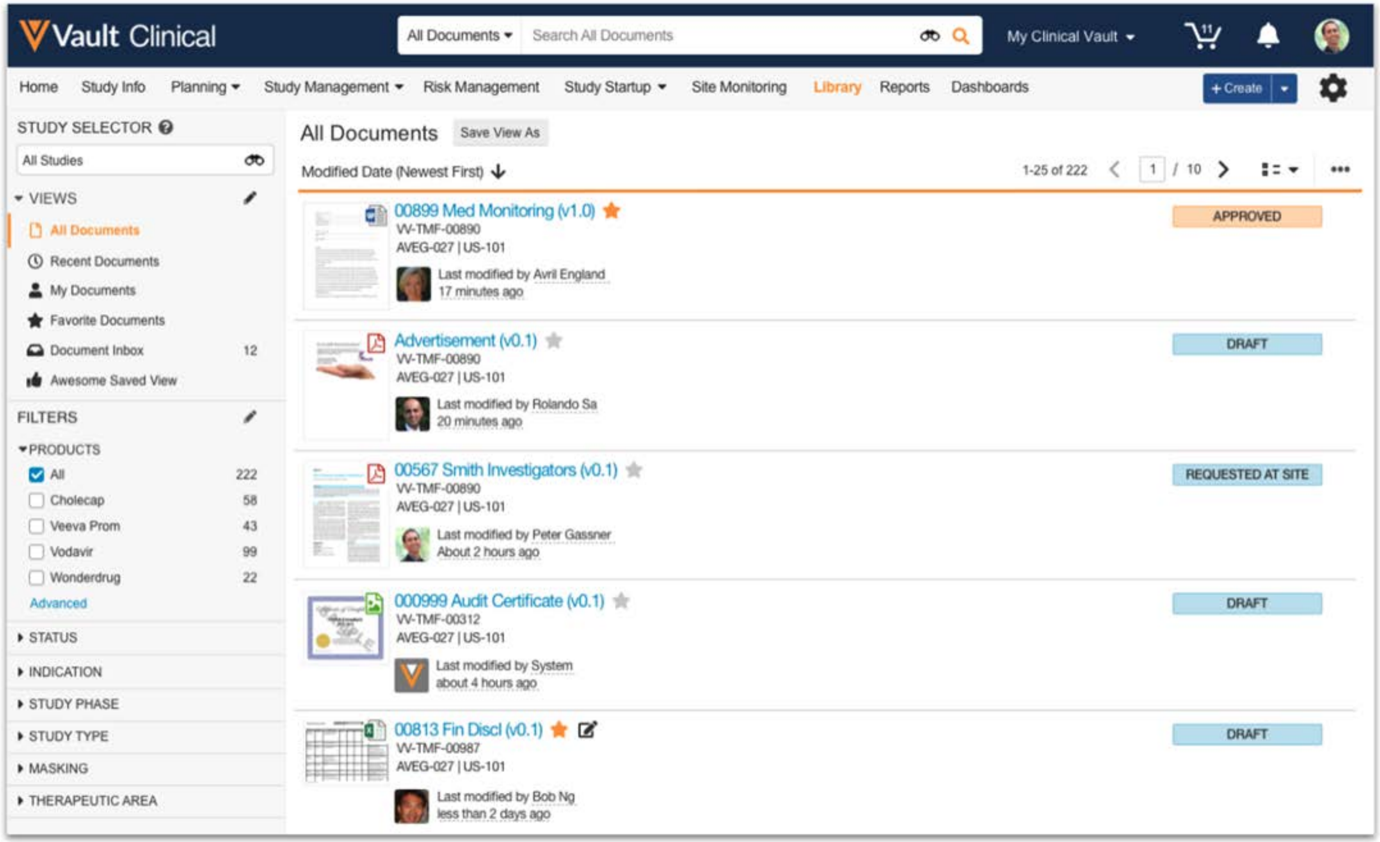
Thank you

Appendix

UI Enhancement Details

- Vault UI Styling
- Action Bar
- Doc Info Page Enhancements
- Notification Badge
- Action Menu Button Change

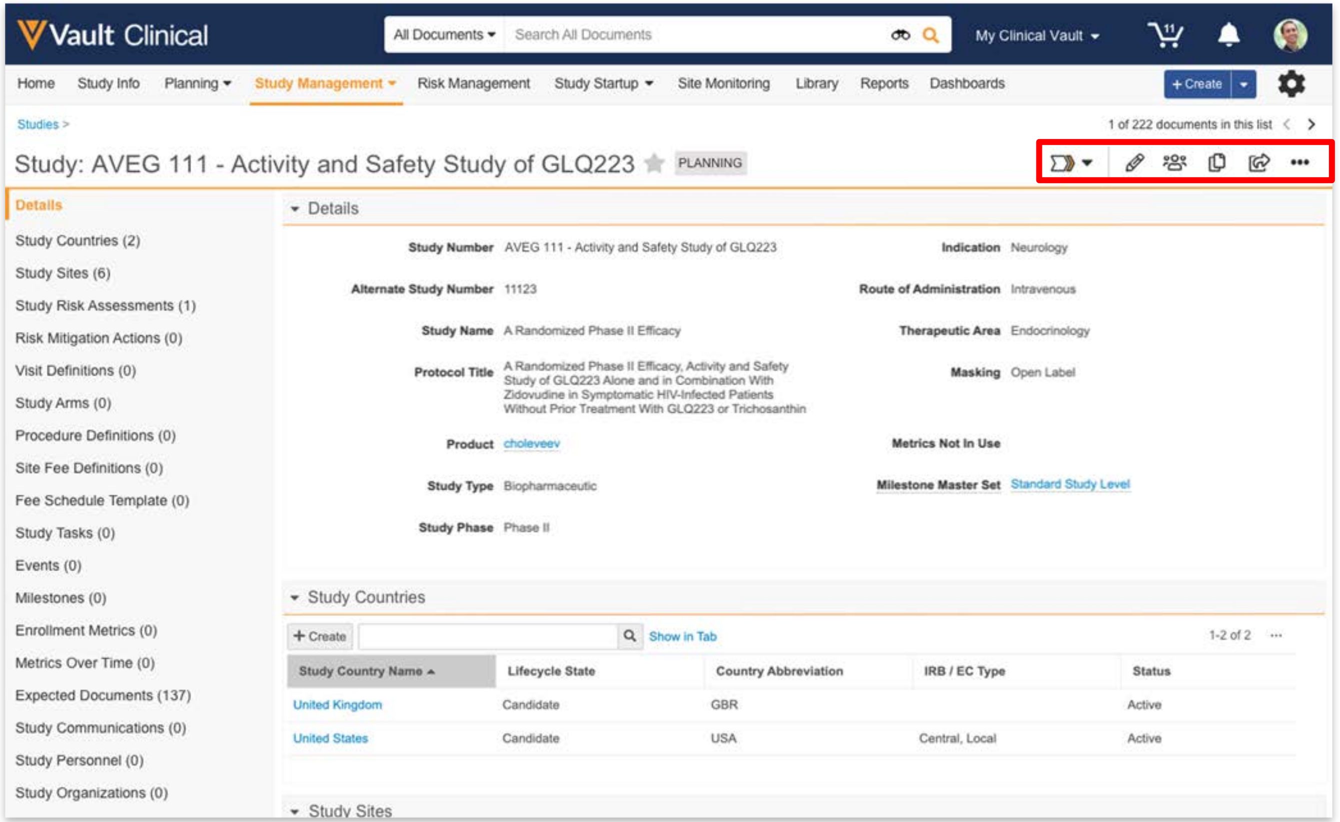
Vault UI Style Updates



- More modern look and feel
- Updated visual styling: color, spacing, and select icons
- Top banner area visual enhancements
- Recommended screen resolution: 1280 x 720 or higher

IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

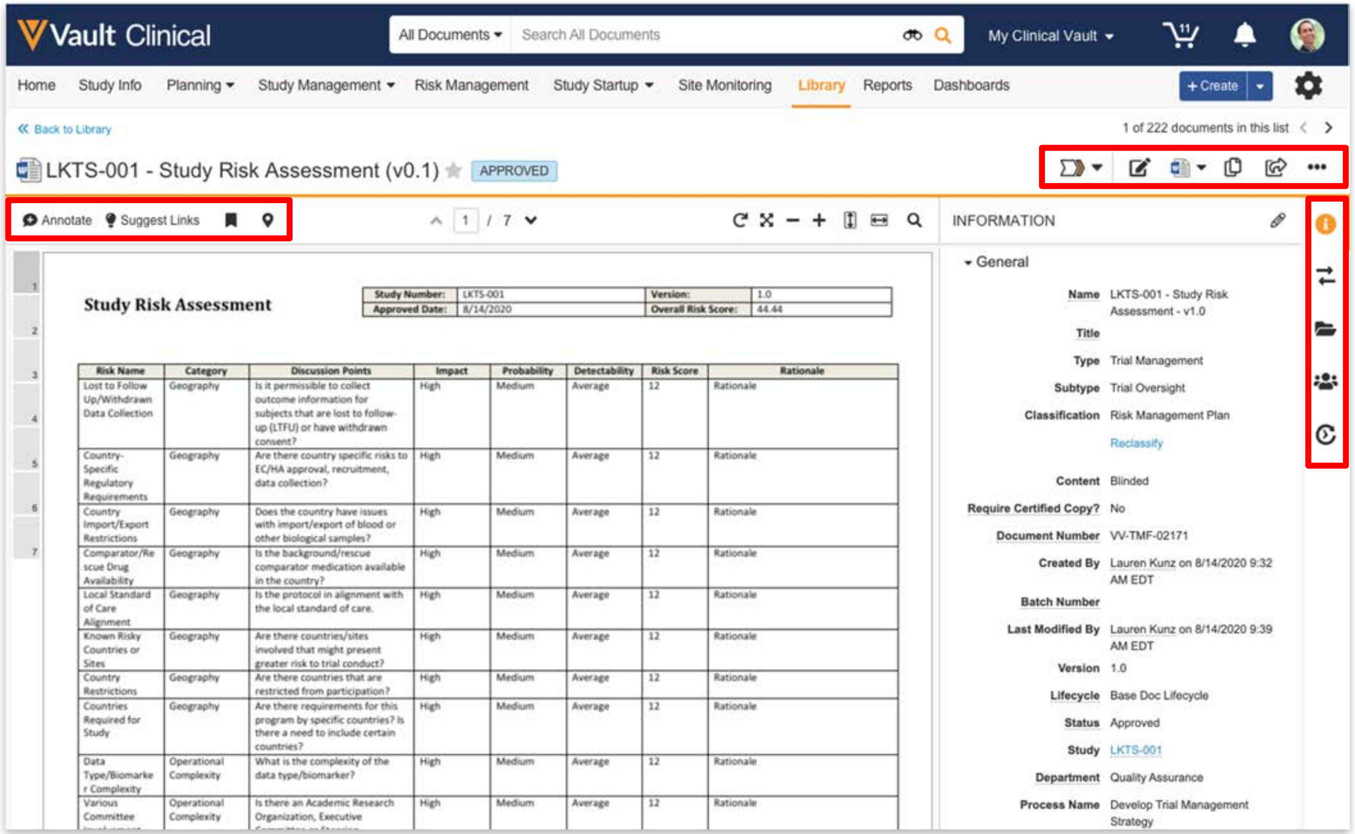
Action Bar



- Quick access buttons to perform each user's own frequently used actions
- A dedicated button to start workflow and change lifecycle state
- Available on Record Details Page and Doc Info Page

IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

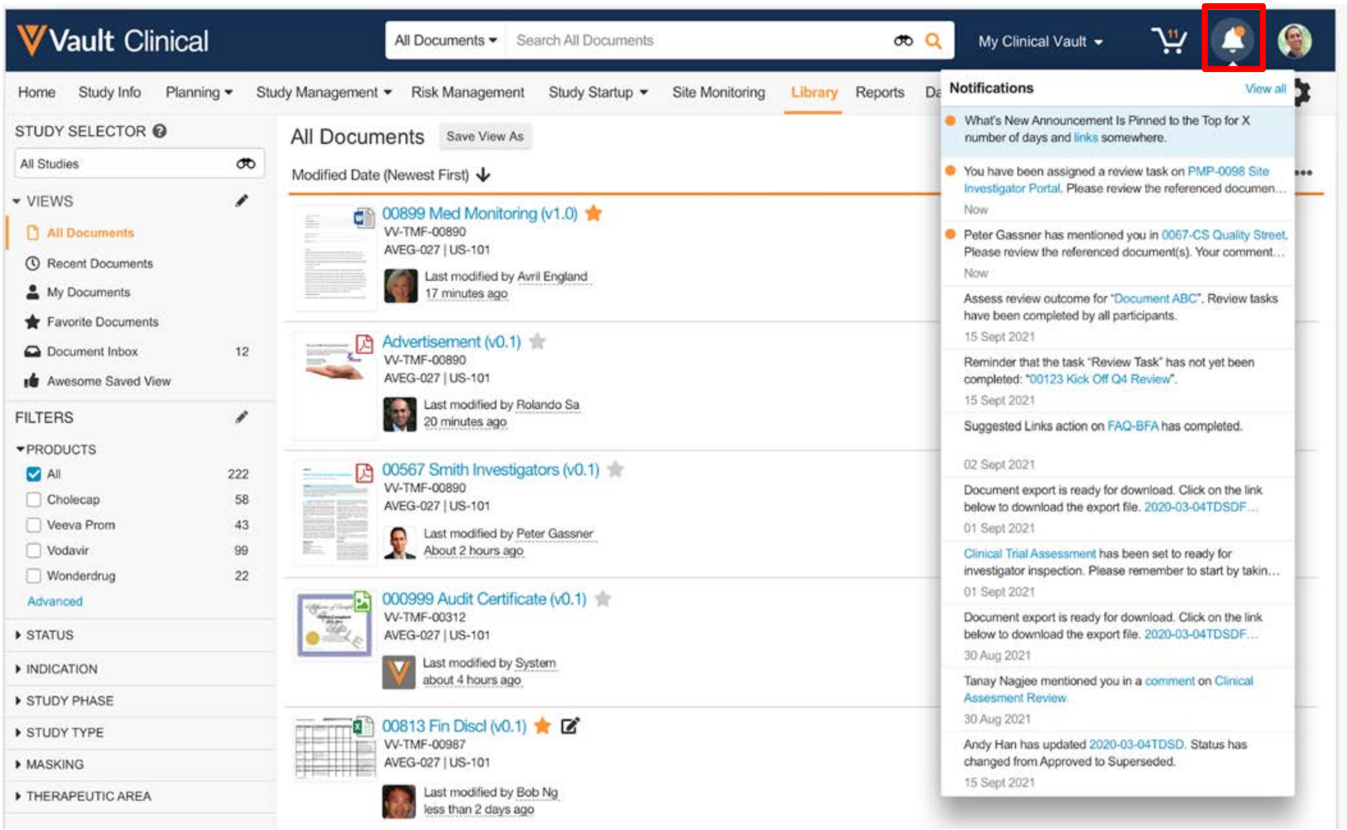
Doc Info Page Enhancements



- Action Bar for Doc Info Page
- Quick access buttons to view and manage document
- Resizeable Doc Viewer and Info Panel
- Simplified and more intuitive Annotation toolbar
- Improved viewing and editing of annotations

IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

Notification Badge



- Easily view notification from anywhere in Vault
- New notification badge in top banner
- Badge icon updates when new notifications arrive
- Navigate directly to new workflow task assignments

IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.

Action Menu Button Change

- The Action Menu Button is changing from a gear icon to ellipses icon
- This change is applied throughout Vault UI, except in Admin pages

Platform Data Model Changes

- Overview
  - **Link Annotations to Permalinks** feature
    - Added the *Bookmark Title* (bookmark_title__v) field to the *Permalink* (permalink__sys) object.
  - **Track User, Machine & Vault File Manager Version** feature
    - Added the *Vault File Manager User* (vfm_user__sys) object.
  - **Checklist: Ad Hoc Questions** feature
    - Added the *Ad Hoc* (ad_hoc__v) field to the *Response* (response__sys) object
    - Added the *Ad Hoc Questions Allowed* (ad_hoc_questions_allowed__sys) field to the *Checklist Design* (checklist_design__sys) object
  - Added the *Enabled* field on the *Document Type Detail* (doc_type_detail__v) object.
  - Added an additional value to the *Check Out Types* (checkout_types__sys) picklist
  - Added additional values to the *Link Status* (link_status__v) picklist
  - Added the *Enabled* field on the *Document Type Detail* (doc_type_detail__v) object.
  - Added an additional value to the *Check Out Types* (checkout_types__sys) picklist
  - Added additional values to the *Link Status* (link_status__v) picklist

Platform Data Model Changes (cont)

- Overview
  - **Checklist: Ad Hoc Questions** feature
    - Added the *Ad Hoc* (ad_hoc__v) field to the *Response* (response__sys) object
    - Added the *Ad Hoc Questions Allowed* (ad_hoc_questions_allowed__sys) field to the *Checklist Design* (checklist_design__sys) object
  - Added the Permission Set field to the Application Roles (application_role__v) object.
  - User Role object records can be created, edited, or deleted by a user with the required object permissions and the Admin > Security > Users > Manage User Object permission. This object can be accessed using the standard Vault object Rest API.

Commercial Data Model Changes (PromoMats)

- Overview
  - Added the following new objects:
    - *Content Module* (content_module__v)
    - *Content Module Asset* (content_module_asset__v) with object types *Claim* (claim__v), *Data* (data__v), *Image* (image__v), *Text* (text__v), and *Rule* (rule__v)
    - *Content Module Ruleset* (content_module_ruleset__v)
    - *Promotional Material Information* (promotional_material_information__v)
    - *Ruleset Rule* (ruleset_rule__v)
  - Added new document field *Promotional Material Information* (promotional_material_information__v)
  - Added the following new document types:
    - *Content Module* (content_module__v) with subtype *Approval Document* (approval_document__v)
    - *Correspondence Letter* (correspondence_letter__v)
  - Added new multi-document workflow *Content Module Approval Document* (content_module_approval_document__v)
  - Added new document lifecycle *Content Module Approval Document* (content_module_approval_document__v)

Commercial Data Model Changes (PromoMats)

- Added the following new object lifecycles:
  - *Content Module Asset Lifecycle* (content_module_asset_lifecycle__v)
  - *Content Module Lifecycle* (content_module_lifecycle__v)
- Added the following new picklists:
  - *Rule Type* (rule_type__v)
  - *Text Element Type* (text_element_type__v)
- Added the following new notifications:
  - *Content Module Workflow Approval Task* (content_module_workflow_approval_task_v)
  - *Content Module Task Assigned* (content_module_task_assigned_v)
  - *Content Module State Change Notification* (content_module_state_change_notification_v)

Web Sections for Object Page Layouts

- Overview
  - Admins and users will see any web sections added to object page layouts through Metadata Definition Language (MDL). Web sections are similar to web tabs and can be used to specify the URL of external web content. For example, to display an address's map location on an *Organization* record
- Learn more about Web Sections in the Developer Portal

Field Default Prompts in Field Rule UI

- Overview
  - Admins can configure field rule defaults for Spark integrations with prompts specific to the target field
    - If the target field is GxP Process? (Yes/No Boolean), Vault prompts for a value of True or False
    - If the target field is Complete By (date field), a date selector calendar UI appears
- Considerations
  - Previously, field values were entered manually, allowing for invalid data

Additional Signature Token

- Overview
  - With this release we added the Signee Federated ID (signee_federated_id__v) token for signatures
- Learn more about User ID Types

Enhance Compare & Configuration Report to Provide Warnings

- Overview
  - This feature enhances the Vault Compare and Configuration Reports to provide a list of potential component and configuration issues in a separate error log for easier troubleshooting.
- Learn more about Vault Compare and Configuration Reports