

# Veeva Commercial Vault MedComms 21R1 Deep Dive

March 2021





Loyd Vidal

Manager, Commercial Content  
Customer Success EU



Geoff Peters

Senior Customer Success Manager, EU

# 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 9	(PODs VV1-2, VV1-8, VV1-12 only) Pre-release vaults available
March 22	(all PODs) Pre-release vaults available
March 22 – 26	Validation package available on VeevaDocs <b>March 22:</b> System Release Memo <b>March 23:</b> Compliance Documents <b>March 26:</b> Executed OQs
March 30	<b>EU PromoMats Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/WN_Pt-LFLjZTmKPaLoM_DQ89w">https://veeva.zoom.us/webinar/register/WN_Pt-LFLjZTmKPaLoM_DQ89w</a> <b>NA PromoMats Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/WN_PeIPpbeiQo2UOPCtG_BaMw">https://veeva.zoom.us/webinar/register/WN_PeIPpbeiQo2UOPCtG_BaMw</a>
March 31	<b>Global MedComms Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/WN_wrqCa8ZhQhCfh73TfcoM_Q">https://veeva.zoom.us/webinar/register/WN_wrqCa8ZhQhCfh73TfcoM_Q</a>
April 8	<b>Developer Release</b> <a href="https://veeva.zoom.us/webinar/register/WN_D4x95U_IRYS4kLGB7dgeoQ">https://veeva.zoom.us/webinar/register/WN_D4x95U_IRYS4kLGB7dgeoQ</a>
April 9	Release to all limited release PODs and PODs VV1-2, VV1-1055, VV1-1065, VV1-1088, VV1-1121 <i>Vault File Manager does not release at this time, and instead releases with the general release PODs</i>
April 16	Release to all general release PODs





# Announcements

— Veeva COMMERCIAL & MEDICAL —

# SUMMITCONNECT

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



Small Group Discussions



Families Invited



Find Out What's Next



Large Group Sessions

### 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

### 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



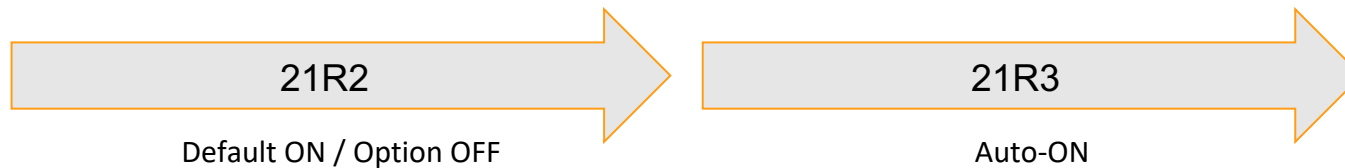




# 21R2: Looking Ahead

# 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

**Vault Clinical** All Documents Search All Documents My Clinical Vault

Home Study Info Planning Study Management Risk Management Study Startup Site Monitoring **Library** Reports Dashboards + Create

1 of 222 documents in this list

LKTS-001 - Study Risk Assessment (v0.1) APPROVED

Annotate Suggest Links

Study Risk Assessment

Risk Name	Category	Discussion Points	Impact	Probability	Detectability	Risk Score	Rationale
Lost to Follow Up/Withdrawn Data Collection	Geography	Is it permissible to collect outcome information for subjects that are lost to follow-up (LTFU) or have withdrawn consent?	High	Medium	Average	12	Rationale
Country-Specific Regulatory Requirements	Geography	Are there country specific risks to EC/HA approval, recruitment, data collection?	High	Medium	Average	12	Rationale
Country Import/Export Restrictions	Geography	Does the country have issues with import/export of blood or other biological samples?	High	Medium	Average	12	Rationale
Comparator/Rescue Drug Availability	Geography	Is the background/rescue comparator medication available in the country?	High	Medium	Average	12	Rationale
Local Standard of Care Alignment	Geography	Is the protocol in alignment with the local standard of care.	High	Medium	Average	12	Rationale
Known Risky Countries or Sites	Geography	Are there countries/sites involved that might present greater risk to trial conduct?	High	Medium	Average	12	Rationale
Country Restrictions	Geography	Are there countries that are restricted from participation?	High	Medium	Average	12	Rationale
Countries Required for Study	Geography	Are there requirements for this program by specific countries? Is there a need to include certain countries?	High	Medium	Average	12	Rationale
Data Type/Biomarker Complexity	Operational Complexity	What is the complexity of the data type/biomarker?	High	Medium	Average	12	Rationale
Various Committee Involvement	Operational Complexity	Is there an Academic Research Organization, Executive Committee, or Steering Committee?	High	Medium	Average	12	Rationale

**INFORMATION**

General

Name LKTS-001 - Study Risk Assessment - v1.0

Title

Type Trial Management

Subtype Trial Oversight

Classification Risk Management Plan

Reclassify

Content Blinded

Require Certified Copy? No

Document Number VV-TMF-02171

Created By Lauren Kunz on 8/14/2020 9:32 AM EDT

Batch Number

Last Modified By Lauren Kunz on 8/14/2020 9:39 AM EDT

Version 1.0

Lifecycle Base Doc Lifecycle

Status Approved

Study LKTS-001

Department Quality Assurance

Process Name Develop Trial Management Strategy

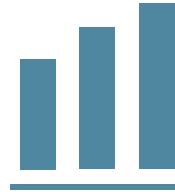
**IMPORTANT: Pre-release features are work-in-progress for informational purposes only. Final released feature may differ from description herein.**



# 21R2: Office Online Support



21R2 Office Online  
Support stops



Collaborative Authoring  
replaces Office Online

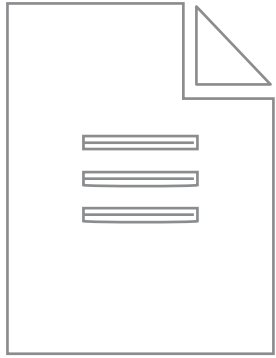


Users can check back in  
until 21R3

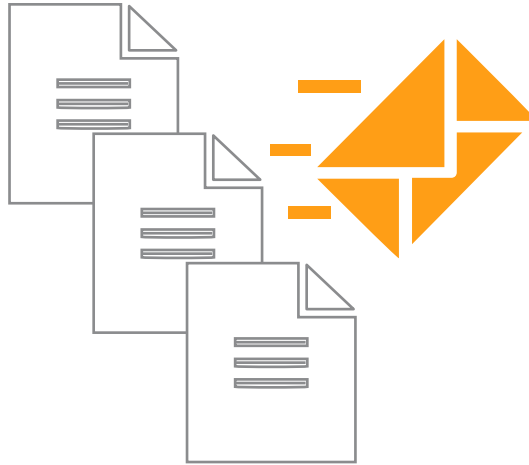
# Moving to One Workflow



# Moving to One Workflow



Document Workflow

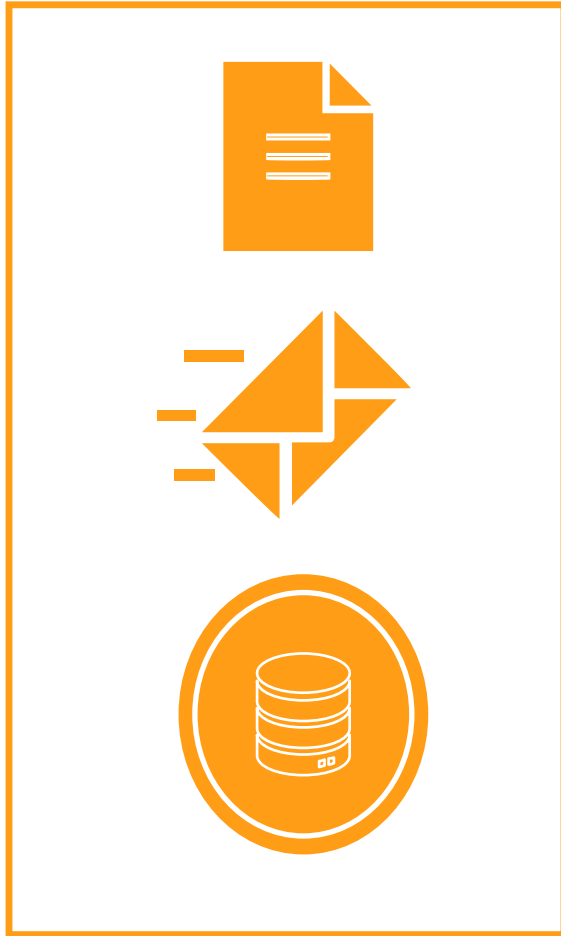


Envelope/MDW



Object Workflow

# 2021: One Workflow



## Benefits:

- Optimizing for future Content Strategy
- Future Proofing For Fast Performance
- Reduced Admin Burden and Ensure Consistency

## Changes coming throughout 2021

## Customer Recommendation:

- You do not need to change existing workflows
- Why consider recreating workflows?
  - New product enhancements will be on One Workflow only
  - You determine that the benefits of sending multiple documents in a workflow outweigh the effort to recreate the workflows in admin



# One Workflow Benefits

- **Optimizing for future Content Strategy**
  - Facilitates new ways of operating for higher volumes of content
  - Increased flexibility and enables more automation
- **Future Proofing for Faster Performance**
  - Better Integrations; external and cross-Vault
  - Faster Performance: New workflow engine has the ability to support asynchronous tasks
  - Veeva will be building future enhancements in One Workflow, not single doc workflow/legacy workflow
- **Reduce Administrative Burden and Ensure Consistency**
  - One workflow to do everything you need, there will be less UI to configure and learn
  - Synergy across all Vaults makes it easier to support your internal customers



# 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*





# 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

The screenshot displays the Veeva Vault interface. The top navigation bar includes 'Tasks', 'Library', 'Reports', 'Dashboards', 'Admin Tools', 'Multichannel Presentations', 'Users', and 'Archive'. The main content area is divided into two sections. The left section, titled 'Upload Files (Step 1)', features a large dashed blue box for file uploads with the text 'Drag and drop files to upload here' and a note: 'Files for upload cannot exceed 4.0 GB in size. Files over 4.0 GB and Audio/Video files over 4.0 GB will not be rendered'. Below this is a 'Choose' button. The right section shows a video player for 'Sample 3GB Video 21R1 (v0.1)'. The video is playing, and a green dashed box highlights a specific frame. A blue callout bubble points to the video player with the text 'Playback video files up to 4GB'. Another blue callout bubble points to the video player with the text 'Annotate videos up to 4GB'. A third blue callout bubble points to the upload area with the text 'Video Files up to 4GB can be upload through the UI'. The video player interface includes a timeline, a 'Veeva' logo, and a 'Multi-Watch' button. The right sidebar shows the 'INFORMATION' panel with fields for 'File Name', 'Size', and 'Format'.

Tasks Library Reports Dashboards Admin Tools Multichannel Presentations Users Archive

Upload Files (Step 1)

Drag and drop files to upload here

Files for upload cannot exceed 4.0 GB in size. Files over 4.0 GB and Audio/Video files over 4.0 GB will not be rendered

or choose files to upload Choose

Video Files up to 4GB can be upload through the UI

Tasks Library Reports Dashboards Admin Tools Multichannel Presentations Users Archive

Sample 3GB Video 21R1 (v0.1) DRAFT

Annotate

1 of 1

INFORMATION

General

File Info

File Name Ben Ober Test Video.mp4

Size 3132576.0 KB

Format MPEG-4 movie

Document Details

Key Dates

Sharing Settings

Submission Details

Components (0)

Linked Documents (0)

PI (0)

Related Documents (0)

Playback video files up to 4GB

Annotate videos up to 4GB



# 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
- 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



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, placed at 00:00 with “alert” icon.
  - Annotations between video and non-video renditions, such as a storyboard PDF, cannot be brought forward
- Use Case
  - With more remote work there is an increased emphasis on videos and users need to be able to annotate efficiently
- Learn more about [annotating videos](#)

# Audio & Video Renditions for CrossLinks

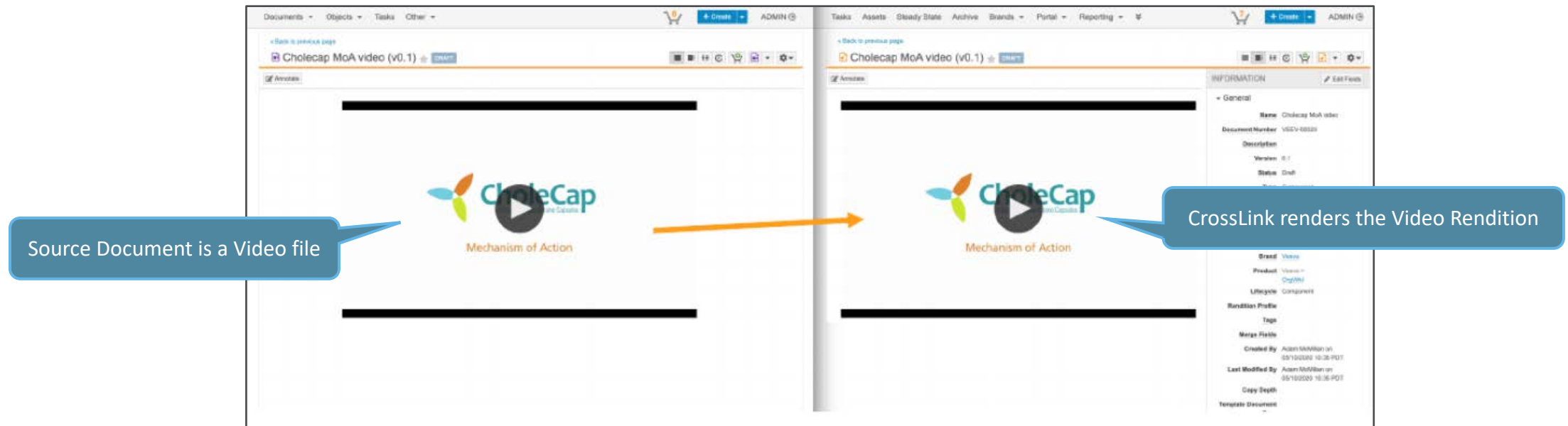


- Overview

- 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
- 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

The screenshot shows the 'Upload Rendition' modal in the Vault interface. The modal has a title bar with a close button (X). Inside, there's a section 'Choose the Rendition Type\*' with a dropdown menu currently set to 'Large Size Asset'. Below this is a 'Choose a File' button. At the bottom, there's a link that says 'Or upload using Vault File Manager (for large files)' with a question mark icon. A dark grey box at the bottom right contains the text: 'Use this option if your file is larger than 1GB (Vault File Manager must be installed). Learn more'. Three callout boxes provide additional context: one on the left states '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'; one on the right states 'The Large Size Asset rendition type is available when included on the document type'; and a third callout points to the 'Or upload using Vault File Manager' link.

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

Or upload using Vault File Manager (for large files) ?

Use this option if your file is larger than 1GB (Vault File Manager must be installed). [Learn more](#)

# Upload Large Size Asset Renditions using Vault File Manager



The destination document number is clearly displayed

Drag and Drop one or more Large files (1GB – 100GB) into the New Upload tab

When the finalizing asynchronous upload is complete the Large Size Asset is added to the Rendition section

Filepath	Upload Type	Destination	Size	Upload Status	Date Added
C:\Users\Orville Mills\Desktop\Demo DAM Content English Master\Video\Cholecap TV Ad.mp4	Large Size Asset	PP-CC-ALL-0038	4.35 MB	Upload complete	24 Feb 2021

- 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

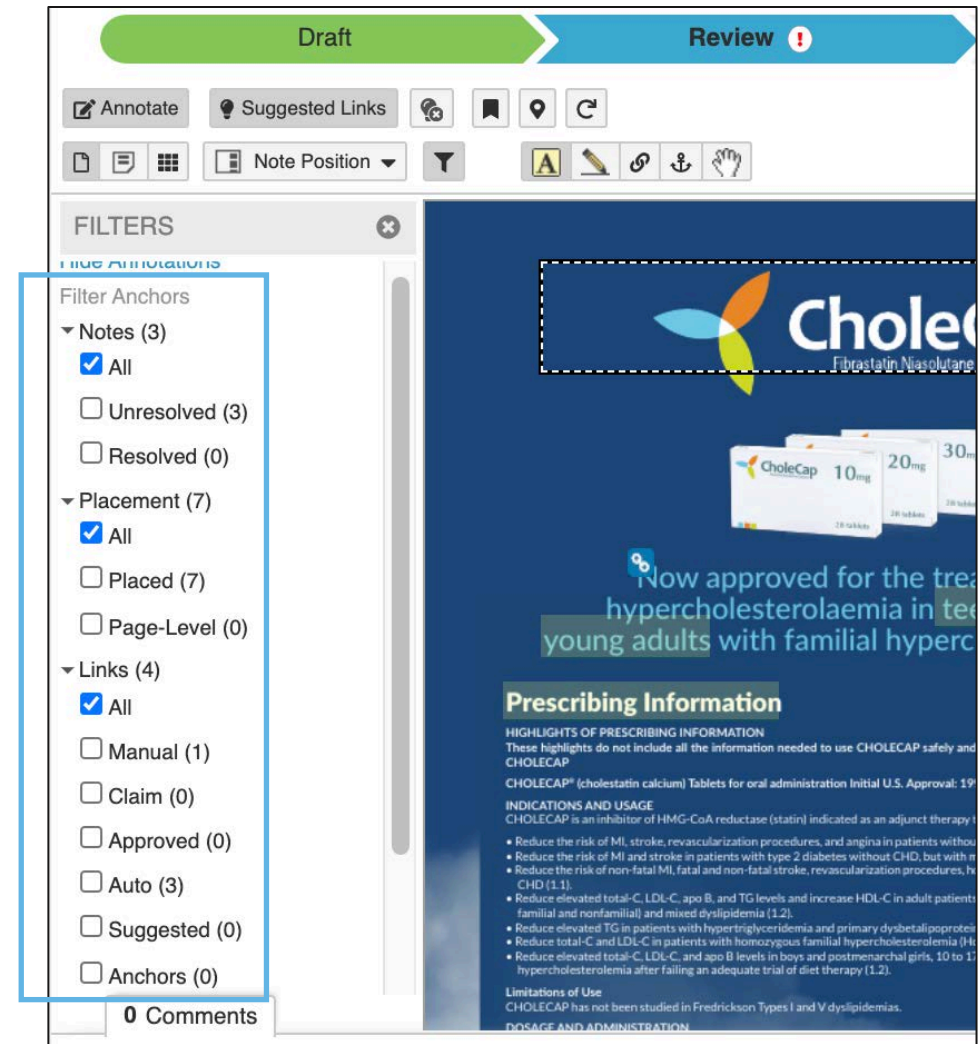


# Auto-On: Working with Documents

# Annotate Filters: Enhancements



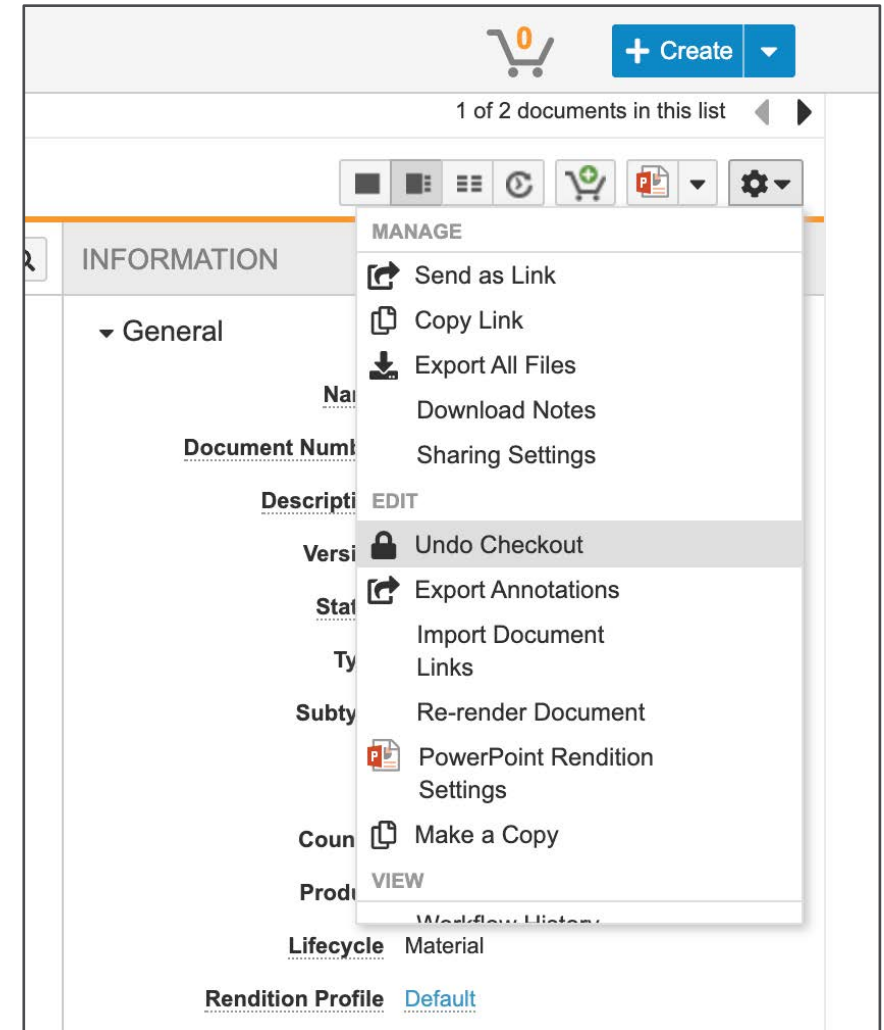
- Overview
  - Moves filters to sidebar
  - Adds Author and Tag (multi-select)
  - Reorganizes and relabels some filters
  - Enhances filter useability by providing more options
  - Enhances value of annotation tagging
- Considerations
  - In-use sections are expanded dynamically
  - Most settings saved 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

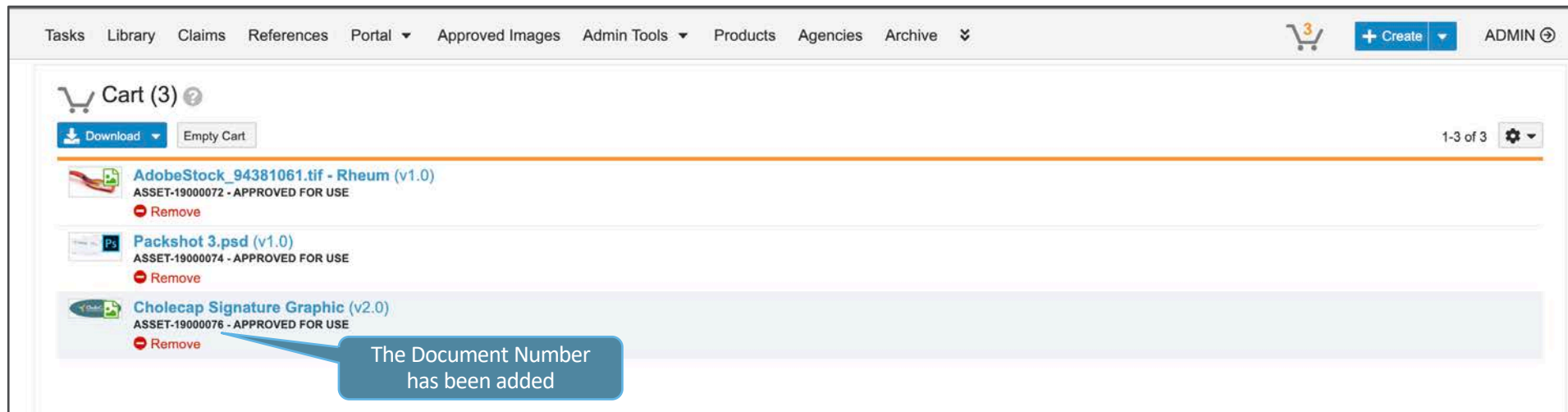




# Show Document Number in Cart

- 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

Create Document from Template (Step 1)

Choose document type

Select a document type, subtype, or classification

RECENT

Claims Document

Claims Document

Next

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

Create Document from Template (Step 1)

Choose document type

Claims Document

Choose template

Product Claim Template

Country Specific Template

Product Claim Template

Cancel Next

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

The screenshot shows the Veeva Library View interface. The top navigation bar includes 'Tasks', 'Library' (selected), 'Claims', 'Reporting', 'Portal', 'Content Utilization', 'More', and 'Single Document Publishing'. A shopping cart icon with '0' and a '+ Create' button are on the right. The left sidebar shows 'VIEWS' (All Library, Recent Library, My Library, Favorites, AFD Promotional Materials) and 'FILTERS' (COUNTRY: contains, united, Apply). The main area is titled 'My Library' and shows 'Filters (1) Clear All Filters' with 'Country contains united'. A table displays the results:

Name	Status	Product	Country	Type
OsteoCox Storyboard (v0.1) ★	Draft	Osteocox	United States	Material
Medical Oncology Department; Princess Ann Hospital 2017 -_ Advanced Inflammatory Breast Cancer (v0.1) ★	Draft	General	United Kingdom	Material

Callouts: 'Shows all results with "United" in the Country name' points to the 'Country' column. 'Contains now available' points to the 'contains' operator in the filter dropdown.



# Document Inbox Improvements

- Overview

- The Document Inbox has received several improvements:

The screenshot shows the 'Document Inbox' view in a software application. The interface includes a sidebar with a 'VIEWS' section containing 'All Library', 'Recent Library', 'My Library', 'Favorites', and 'Document Inbox' (highlighted). The main area displays a table with columns: Name, Document Number, Status, Type, Created By, and Created Date. A 'Complete' button is visible above the table. A callout points to the 'Complete' button, stating: '2) The Classify Action is renamed to Complete'. Another callout points to the table's header row, stating: '3) An updated Tabular View UI with select row check box'. A third callout points to a 'Move' button, stating: '4) Drag & drop up to 250 documents directly into the document Inbox and track file upload progress'. A fourth callout points to the 'Document Inbox' in the sidebar, stating: '1) The Document Inbox View will ALWAYS be available for users with the Create permission on at least one document type'. A status bar at the bottom shows '3 successful' and a list of documents: 'Objects Overview', 'Objects Overview', and 'Template - Internal - Veeva Corporate ...'.

Name	Document Number	Status	Type	Created By	Created Date
Objects Overview	1111111111	Unclassified	Undefined	Orville Mills	2/18/2021 1:11



# Auto-On: Reporting

# 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

- Use Case

- Use this to track the time between key stages in your promotional content based on key date information

Time to live in field by Country >

Create Formula Field for [Time to live in field by Country] ?

Object: Document

Label: Time to live in field

Return Type: Number

Decimal places: 0

Formula Expression: Fields | Functions | Operators

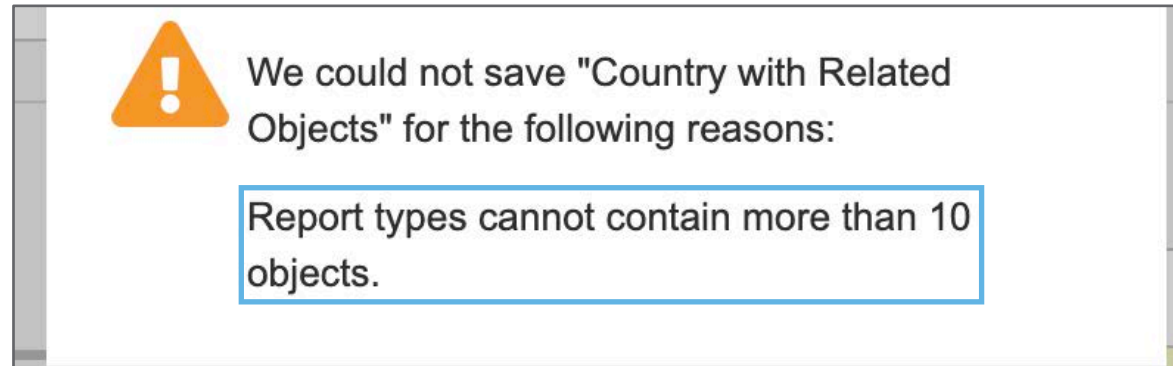
created

`documents.approved_for_distribution_date__c - documents.document_creation_date_v`

# 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)



# 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 alternative 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





# 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	Cholecap Follow-Up (April 2020) (v1.0)	Healthcare Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Cholecap Follow-Up (April 2020) (v1.0)	Healthcare Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Cholecap Follow-Up (April 2020) (v1.0)	Healthcare Provider
Approval	Maria Ruoto	4/22/2020 12:56 AM EDT	4/22/2020 12:58 AM EDT	Cholecap Follow-Up (April 2020) (v1.0)	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 (v1.0)	

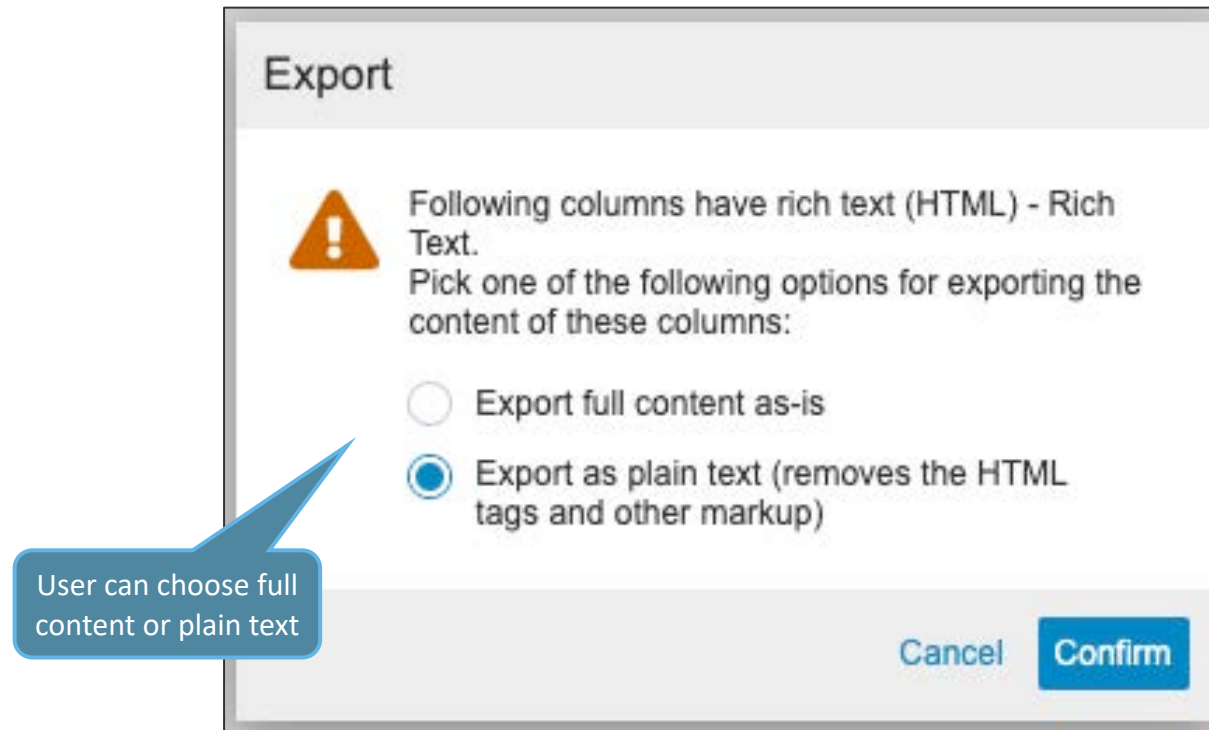
When sorting, blank cells will always appear at the end of the resulting list

# 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
- For Rich Text fields, users can choose to export either formatted or unformatted text
- Additionally, users can now view the full text within the context of the report



# 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

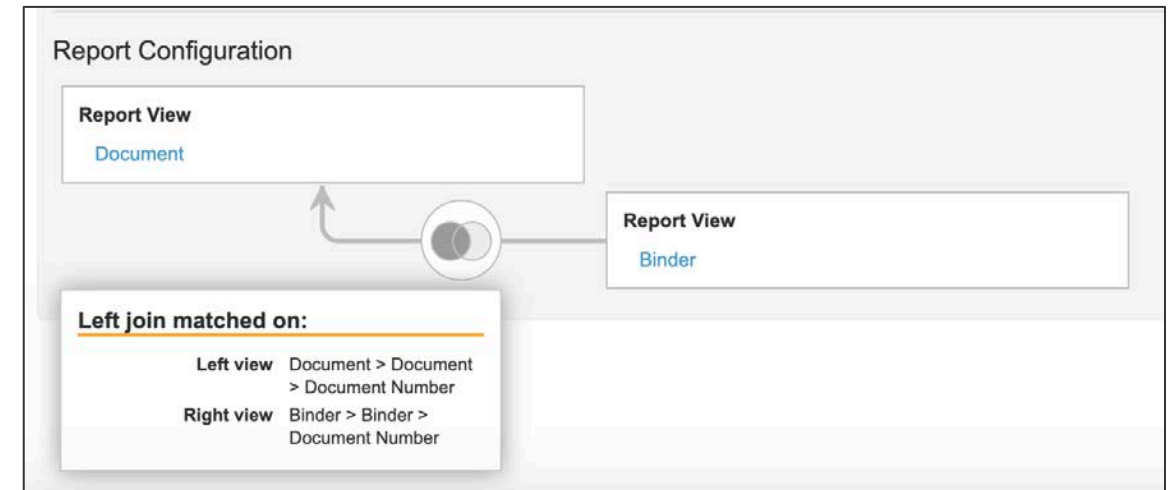
- Considerations

- 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

# Capture Adverse Events



- Overview
  - Medical Inquiries are a frequent source of Adverse Event reporting
  - New standard object in MedComms Vaults to capture additional data related to Adverse Events as part of Medical Inquiries
  - Data can then be shared to Pharmacovigilance
- Use Case
  - Medical Inquiries are often a source of Adverse Event reporting, this will facilitate data capture and forms basis for future changes

# Export Adverse Events to E2B(R3) Compatible Case Safety Report



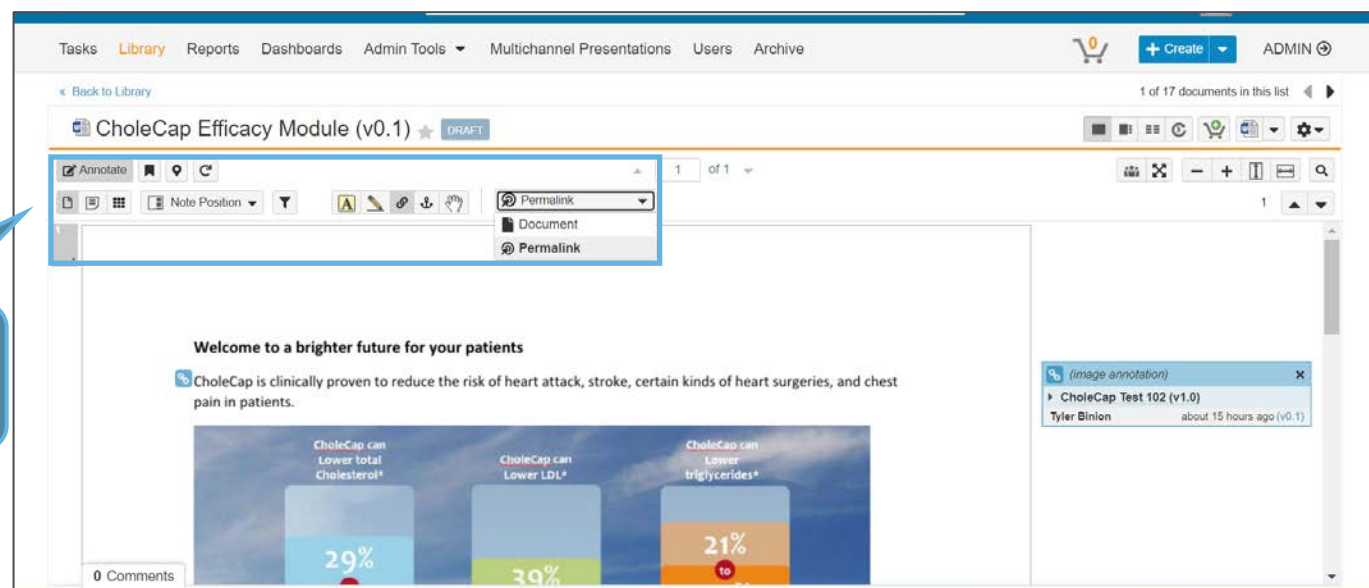
- Overview
  - Uses the new Adverse Event record as part of a Medical Inquiry
  - Allows users to export the standard Adverse Event data in an XML format using the E2B(R3) standard
  - Exported data can be transferred to a Pharmacovigilance/Safety system and read in as structured data load
  - Users can send the XML formatted file to Safety colleagues who can read it into third party safety systems without need to re-key the data
- Use Case
  - Ensure Adverse Event information is shared according to industry standard schema from Vault MedComms to third part pharmacovigilance AE reporting systems
- Considerations
  - This feature supports the MedComms standard Adverse Event and its fields only
  - Cannot be used with custom fields or custom Adverse Event objects

# Link Annotations to Permalinks



- Overview

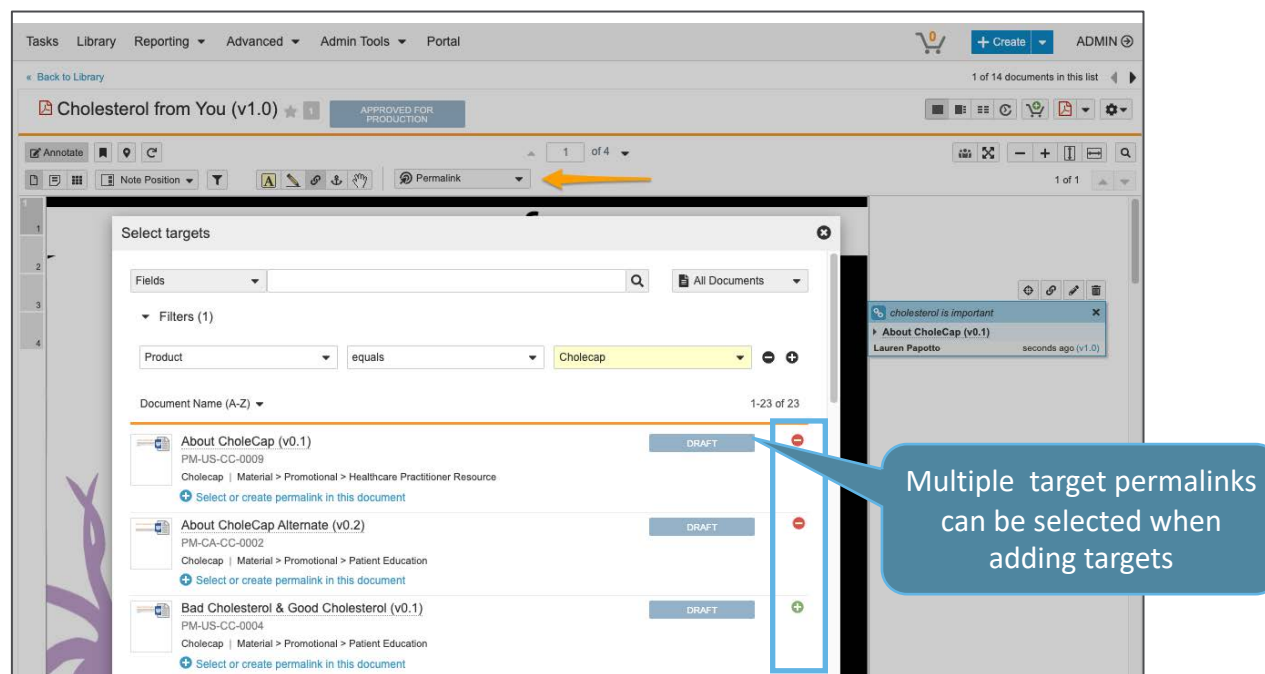
- This feature allows users to link annotations to permalink targets which will keep your link annotations with the most recent version of that specific permalink target (subject to user permissions)



# 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

Documents

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

Excluded Characters: ©®™SM†

Enable linking to permalinks



# Expanded Search

- Overview

- Admins can create collections of objects that users can search together when executing a single search within Vault
- Users can expand their search from a single object in a custom tab to all objects in the collection
- Users can filter and sort the search results for each of the objects independently to build a refined view of records across the collection

- Impact

- End users can more easily locate data and information they are searching for without having to be precise against which object record they are searching

- Use Case

- Users can use this to across all adverse events, case requests and case responses that contain certain words such as anaphylaxis.
- Previously they would need to search all of the record individually

- Configuration

- Go to Admin > Settings > Search Settings > Create Search Collection

# PDF/A Viewable Renditions

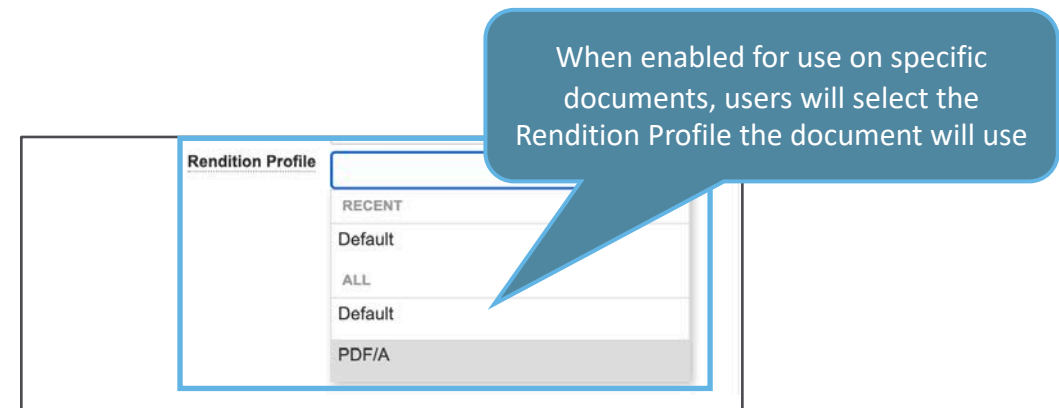
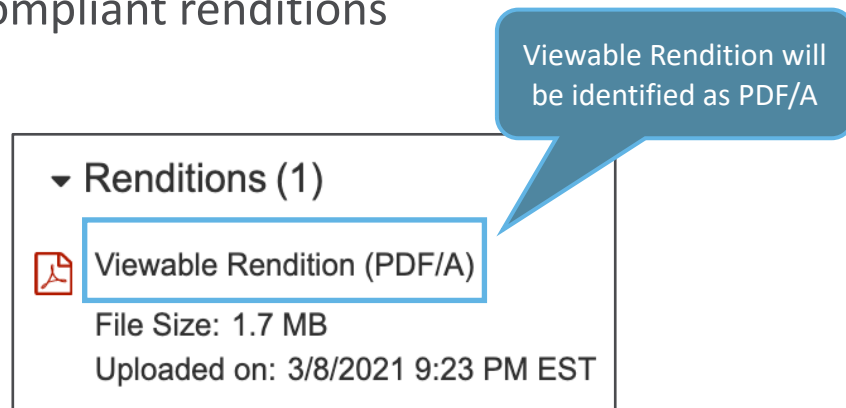


- Overview

- 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



# 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

The screenshot shows the 'Rendition Settings' page in the Vault Admin interface. The left sidebar lists various settings categories, with 'Rendition Settings' highlighted. The main content area is titled 'Rendition Settings' and contains three sections: 'Font Embedding' with radio buttons for 'Default embedding' (selected), 'Embed font subsets', and 'Embed full fonts'; 'Bookmark & Link Settings' with checkboxes for 'Generate bookmarks based on Table of Contents and Lists of Figures', 'Generate bookmarks for Title Style', 'Set link text to blue', and 'Auto generate bookmarks for captions'; and 'PDF Format' with radio buttons for 'Generate PDF Rendition' and 'Generate PDF/A-1b Compliant Rendition' (selected). A blue callout bubble points to the 'Generate PDF/A-1b Compliant Rendition' option with the text 'Vault wide: Checkbox in Admin to enable PDF/A'.

The screenshot shows the 'Rendition Profiles' page in the Vault Admin interface. The left sidebar lists various settings categories, with 'Configuration' highlighted. The main content area is titled 'Rendition Profiles' and contains a 'Details' section with a 'Rendition Profile' dropdown menu set to 'PDF/A'. Below this are the same 'Font Embedding', 'Bookmark & Link Settings', and 'PDF Format' sections as seen in the previous screenshot. A blue callout bubble points to the 'Generate PDF/A-1b Compliant Rendition' option with the text 'Rendition Profile: Checkbox to define PDF Format'.



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

The screenshot shows the 'Settings' tab in the Veeva Vault Admin interface. The left sidebar contains links for 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings' (which is highlighted). Under 'Settings', there are links for 'Network Access Rules', 'SAML Profiles', 'OAuth 2.0 / OpenID', and 'Connect Profiles'. The main content area is titled 'API Information' and displays 'Burst API Count (last 5 min)' as '0 out of 2,000'. A blue callout box points to this value with the text: 'Only the Burst API Limit is displayed in the Admin Settings'.

- 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

# 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

Claim: CL-000009 APPROVED

**Details**

Name: CL-000009  
Created By: CSM User  
Created Date: 11/15/2019 4:15 PM EST  
Status: Active  
Product: Cholecap  
Country: United States  
Claim Risk  
Claim Restrictions  
Claim Instructions for Use

**Reviewer Comments**

**Claim Documents**

21% to 42% Reduction in Tri-G C-CC-0001 Approved for Use Claims Document

The Add document button has been removed from the record's Related Document section preventing users from relating new documents from the object record

21% to 42% Reduction in Tri-G (v1.0) APPROVED FOR USE

**Supporting References**

Search: Claim Record

Use search bar to find an item, and then use the table below to make selection

Filters

Start typing to see options...

+ Create Clear Selection

Name	Lifecycle State	Match Text	Category	Prod
CL-000002	In Review	Reduces risk of mort...		Ch
CL-000003	Approved	Reduces risk of mort...	Efficacy	Ch
CL-000004	Approved	The only oral oncolyti...	Instruction For Use	Re
CL-000005	Approved	Le seul oncolytique o...	Reliability	Re
CL-000006	Approved	1.5x more patients re...	Efficacy	Ch
CL-000007	Approved	CholeCap significantl...		Ch
CL-000008	Approved	The most common si...	Adverse Event	Ch
CL-000009	Approved	A 34 % reduction in l...		Ch
CL-000011	Approved	Less than 3 % of Cho...	Adverse Event	Ch

Displaying 1-21 of 21

Claim Record CL-000009

Full Claim wording must be used as specified.

- 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

Objects > Claim

### Configure Page Layout for Claim Records

Layout Rules (0) Cancel Save

Details

Match Text Variations

References

Where Used

Claim Withdrawal Information

Core Supporting Documents

Reviewer Comments

Claim Documents

Workflow Timeline

Integration Details

System Information

Medical Comment

Regulatory Comment

Legal Comment

Add

#### Claim Documents

Edit Column

Name	Document Number	Status	Type	Subtype
------	-----------------	--------	------	---------

Enabling this feature removes the Add Document Button from the Related Document Section

### Edit Related Document Section

**Referencing Document Field\***

Claim Record

**Section Label\***

Claim Documents

**Section Name\***

documents\_c

**Show the section only in these lifecycle states**

**Section Help**

0/255

☐ Prevent Document Addition

Cancel Done





# 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 & GROUPS

Vault Users

Active Delegations

Groups

Security Profiles

Permission Sets

Application Roles

Application Roles ?

+ Create

Search Columns

Q

1-25 of 25

Label ^	System Status	Description	Name	Constrain User Role Setup	Permission Set
Approver	Active	System Provided Role	approver__c	No	
Assigned To	Active	System Provided Role	assigned_to__v	No	
Checklist Respondent	Active	System Provided Role	checklist_respondent__sys	No	
Compliance Package Publisher	Active	Utilized for integrations between PromoMats and Publishing software for eCTD Compliance Packages.	compliance_package_publisher__v	No	
Consumer	Active	System Provided Role	consumer__c	No	
Content Creator	Active		content_creator__c	No	
Content Module Reviewer	Active	Used to manage the approval of Content Modules and associated Content Module Asset	content_module_reviewer__v	No	

Users can be added to specific permission sets within application roles

ALL

Business Administrator Actions

Business Administrator Actions

Copy of PromoMats User Actions

External PromoMats User Actions

External User Actions

Full User Actions

Portal Experience User Actions





# 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

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

Objects > User

Configure Page Layout for User Records

Domain User

General Info

Activation Details

Details

Email Preferences

User Role Setup

Workflow Timeline

Groups

Delegate Access

Security Overrides

Veeva Support

Domain User

General Info

Name\*

First Name\*

Last Name\*

User Name\*

Email\*

Office Phone

Mobile

Fax

Add Related Object Section

Related Object\*

User Role

Section Label\*

User Role

Section Name\*

user\_role

Show the section only in these lifecycle states

Creation Option

☐ Create record in new page

☒ Create record in pop-up dialog

☐ Prevent record addition

Section Help

0/255

Filter Related List

Start typing to see options...

Cancel Done

Add a related object section for the User Role object to the User object detail page layout

# 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
- Impact
  - Users are guided to select content that is relevant to the object record more quickly
- Use Case
  - Can be used on any object record to apply restrictions via VQL
- Configuration
  - Admin > Configuration > Objects > *Object Name* > Page Layout > Add related content section with VQL criteria

# 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

Document Fields >  
Template Document Type

Details ?

Label Template Document Type

Status **ACTIVE**

Source ▼ Standard Field

Name template\_doctype\_\_v

Field Type Object

Object Document Type Detail (doc\_type\_detail\_\_v)

Display

Template

Allow user to select multiple values

Reference Constraint ?

Filter expression enabled\_\_v = 'true'

The (enabled\_\_v = 'true') filter expression will display only Active status document type, subtype, or classification

21% to 42% Reduction in Tri-G (v1.0) ★ APPROVED FOR USE Edit

Annotate Suggest Links View Links 1 of 1

Claim

Cholecap is the only drug that can lower triglycerides by 21% - 42%.

Supporting References

1. Role of Veevastatin
2. Calhoun D, Trimar 2011; 36(11):32-4 February 2, 2012

Usage Notes

- Full ISI & Link to the

Search: Template Document Type

Use search bar to find an item, and then use the table below to make selection

Filters

Start typing to see options...

Displaying 1-25 of 101 1 / 5

Name	Level	Parent Type	Parent Subtype
Advertisement	Classification	Material	Promotional Piece
Advertisement	Classification	Med Device Material	Promotional
Advisory Board Materials	Classification	Material	Non-Promotional Piece

Template Document Type

Users will only be able to select values that have an Active status. Inactive status values are not available for selection.

# 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

The screenshot displays the 'Atomic Security' configuration page in the Veeva Vault interface. The page is divided into two main sections: 'Atomic Security: User Actions' and 'Atomic Security: Active Workflow Actions'. The 'User Actions' section lists various actions like 'Generate PDF From ...', 'Approve for Distribution', 'Cancel material', etc., with their respective state behaviors. The 'Active Workflow Actions' section lists actions like 'Cancel Task', 'Cancel Workflow', 'Reassign', 'Remove Content', 'Update Participants', and 'Update Task Due Date', with columns for different roles (Legal, Medical, Reviewer, Regulatory) to specify visibility (Hide/Execute) and a 'Role Override' button. A blue callout box points to the 'Atomic Security' tab and the 'User Actions' table, stating: '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'. Another blue callout box points to the 'Active Workflow Actions' table, stating: 'Actions can be hidden from users who should not be able to perform them'. A third blue callout box points to the 'Role Override' button, stating: 'Actions can be hidden from users who should not be able to perform them'.

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



# 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

The diagram illustrates the relationship between the Admin Field Layout configuration and the Document Information panel. On the left, the 'Field Layout' configuration shows a list of sections: General (general\_\_c), Lifecycle Details (lifecycle\_details\_\_v), File Info (file\_info\_\_v), Document Details (document\_details\_\_c), Portal Details (portal\_details\_\_v), Key Dates (key\_dates\_\_c), and Sharing Settings (sharing\_settings\_\_v). A large blue arrow points from this configuration to the Document Information panel on the right. The Document Information panel shows a list of sections: General, File Info, Document Details, Key Dates, and Sharing Settings. A callout box points to the missing sections in the Document Information panel, stating: 'Note the *Lifecycle Details* and *Portal Details* sections are not applicable to this document type'.

- Considerations

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

# 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](#)

# Enhancements to Document Name Inheritance



- Overview

- When configuring a document type's *Document Name Format*, Admins can select whether the document name regenerates each time the document is saved
- As part of the 21R1 release, it is now easier for users to determine in the *Edit Document Type* dialog if the *Document Name Format* or *Document Name Regeneration* settings are inherited from a parent document type

- 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


When using a 'Custom Document Name Format' the 3 options under 'Document Name Regeneration' will appear

**Document Name Format**

☐ Inherit from "Base Document": Use File Name

☐ Use File Name

☒ Use custom format

{FileName} 

*Field truncates at 100 resolved characters*

**Document Name Regeneration**

☐ Inherit from "Base Document": Do not regenerate document name on save

☒ Regenerate document name on save

☐ Do not regenerate document name on save





# 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

Document ID																	
D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S		
Version	Action	Item	Field Name	Old Value	New Value	Job Instance	Workflow	Task Name	Signature	View License	Event Description	Document ID					
1	GetDocum	HA-2100001									Viewed D	9					
1	EditDocIn	HA-21000	Initial Steady State D	2/17/2021 9:22 AM PST							Initial Stea	9					
1	EditDocIn	HA-21000	Approved for Distrib	#####							Approved	9					
1	EditDocIn	HA-21000	Days to Approval	28							Days to A	9					
1	UPDATE_I	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					
0.1	GetDocum	ASSET-21000004									Viewed D	15					
0.1	GetDocum	ASSET-21000004									Viewed D	15					
0.1	GetDocum	ASSET-21000004									Viewed D	15					
0.1	GetDocum	ASSET-21000004									Viewed D	15					
0.1	EditDocIn	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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0.1	GetDocum	ASSET-21000004									Viewed D	15					
0.1	GetDocum	ASSET-21000004									Viewed D	15					

The Document ID CSV file picks up the new document ID

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

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

LOGS

- System Audit History
- Login Audit History
- Document Audit History**
- Object Record Audit History
- Document Audit History

### Document Audit History ?

Timestamp [icon] is in the last [dropdown] Day

+ Add filter

Showing events for 2/16/2021 to 2/17/2021 (29 results)

Timestamp (M/d/yyyy)	User Name	Item	Version	Event Description
2/17/2021 9:23 AM PST	lauren.subik@vv-csm.com	HA-2100001	1.0	Viewed Document
2/17/2021 9:22 AM PST	System	HA-2100001	1.0	Initial Steady State Date set to "2/17/2021 9:22 AM PST"
2/17/2021 9:22 AM PST	lauren.subik@vv-csm.com	HA-2100001	1.0	Approved for Distribution Date set to "2/17/2021"
2/17/2021 9:22 AM PST	System	HA-2100001	1.0	Days to Approval set to "28"
2/17/2021 9:22 AM PST	lauren.subik@vv-csm.com	HA-2100001	1.0	Version number changed from 0.1 to 1.0

EXPORT

- Export to CSV
- Export to PDF

This is where you can view Document Audit History and generate a file

Click here to download the CSV file with the new ID column

# 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

**Lauren Subik**

Log in as Choose User

**Email**  
lauren.subik@veeva.com

**User Name**  
lauren.subik@vv-csm.com

**Password**  
[Change Password](#)

**Groups**

Report Owners

Vault Owners

**General Information** [Edit](#)

**Name**  
Lauren Subik

**First Name**  
Lauren

**Last Name**  
Subik

**Alias**

**Title**

**Company**

**Office Phone**

**Mobile**

**Fax**

**Location**

**Timezone**  
(GMT-06:00) Central Standard Time (America/Chicago)

**Language**  
English

**Locale**  
United States

**Notification and Email Preferences**

Notification	Every Occurrence	Summary
<a href="#">Favorite Document New Comment</a>	<input type="checkbox"/>	
<a href="#">Favorite Document New Content</a>	<input type="checkbox"/>	
<a href="#">Favorite Document New Status</a>	<input type="checkbox"/>	
<a href="#">Product Announcement Emails</a>	<input type="checkbox"/>	
<a href="#">Service Availability Notifications</a>	<input type="checkbox"/>	
<a href="#">Tasks</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">User Mentions</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# 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

Pages > Layouts > User Profile Layout

**LAYOUT**

- User Profile Layout

**SECTIONS**

- General Information
- Notification and Email Preferences

**Details**

**Options**

**Fields**

- ID
- Name
- Status
- Created By
- Created Date
- Last Modified By
- Last Modified Date
- Domain Admin
- Email
- User Name
- First Name
- Last Name
- Image
- Language
- License Type
- Locale
- Product Announcement Emails
- Service Availability Notifications
- Favorite Document New Status
- Favorite New Content
- Favorite Document New Comment
- Tasks
- User Mentions
- Manager

**Read Only Fields**

- Manager



# 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

The screenshot shows the 'New Tab' configuration interface. On the left is a sidebar with a tree view containing 'Tasks', 'Library', 'Reports', 'Dashboards', 'Admin Tools', 'Portal', 'Portal Library', 'Multichannel Presentations', 'Users', 'Archive', and 'New Tab'. The main area is titled 'New Tab' and includes buttons for 'Reorder', 'Create', 'Cancel', and 'Save'. Fields include 'Label\*' (Web Tab Example), 'Name\*' (web\_tab\_example), 'Status' (Active), 'Source' (Custom), 'Tab Type\*' (Web), and 'URL\*' (https://<sample>.com). A dropdown menu for 'Source' is open, showing options: 'SessionID' (with token \${Session.id}), 'URL Parameter' (with token \${UriParameter.paramName}), 'URL Query String' (with token \${UriQueryString}), and 'Email' (with token \${User.email\_v}). The 'URL' field contains 'https://<sample>.com' followed by a token \${UriQueryString}. A blue callout box points to the token in the URL field with the text 'Tokens for query string and query parameters'.



# 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.

Objects > Application > Sharing Rules > Matching Rules >

## New Sharing Rule ?

Details

Label\*

Match on Lead Market

Name\*

match\_on\_lead\_market

\_\_c

Status

Active

▼

Description

Role\*

Viewer

🔗

Rule Criteria

Matching user setup object and object fields

	User setup fields	Object fields
<input type="checkbox"/>	Country (country__c)	<div>✓ Country (country__c) Lead Market (lead_market__c)</div>

Cancel Save

Dropdown displays the object fields that reference the same object/picklist as the User Role Setup field



# 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

Business Admin Logs Users & Groups Configuration **Operations** Settings Vault

JOBS  
Job Definitions  
Job Status

RENDITIONS  
**Renditions Status**

Rendition Status ?

Timestamp is in the last Day Apply

+ Add filter

Showing events for 2/9/2020 to 2/10/2020 (8 results) 1-8 of 8 1 of 1

Document Number	Timestamp ▲	Rendition Status	Status Message
VV-00004	10 Feb 2020 12:48 PM EST	Success	The operation completed successfully.
VV-00002	10 Feb 2020 11:09 AM EST	Success	The operation completed successfully.
VV-00008	10 Feb 2020 10:53 AM EST	Warning	The operation completed with the following warnings: source file fonts are not supported.
VV-00005	10 Feb 2020 9:35 AM EST	Success	The operation completed successfully.
VV-00001	9 Feb 2020 5:32 PM EST	Failure	Vault could not render a PDF/A compliant rendition.
VV-00006	9 Feb 2020 2:41 PM EST	Warning	The operation completed with the following warnings: source file has validation errors.
VV-00007	9 Feb 2020 12:12 PM EST	Exception	A vault failure occurred.
VV-00003	9 Feb 2020 10:23 AM EST	Success	successfully.

Results may be filtered by status & Document Number

Results may be sorted by clicking the column headers

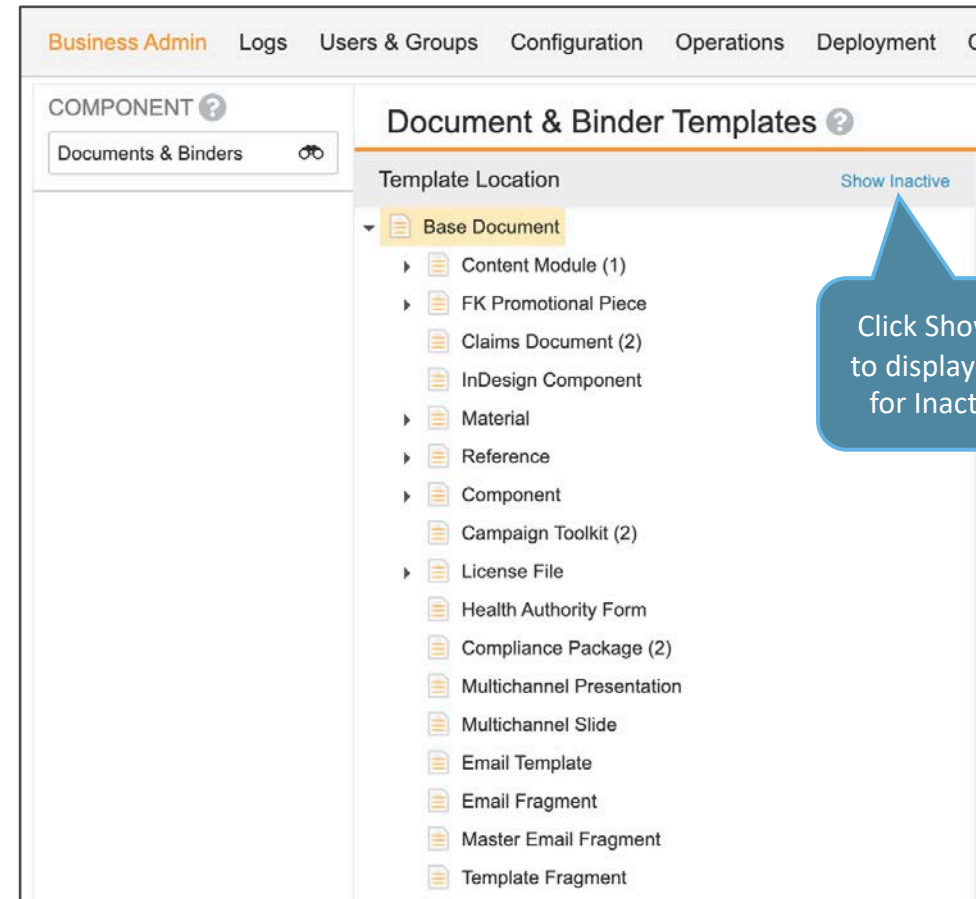


# Templates: Hide Inactive Document Types



- 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 CLI users now have the ability to create, move and delete files and folders on the staging server from the CLI utility
- Additional details can be found [here](#)

```
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -mkdir demo_folder
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -ls
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
/demo_folder
/folder1
/u4966723
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -rm folder1
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -ls
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
/demo_folder
/u4966723
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -move demo_folder /u4966723 -overwrite
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -ls
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
/u4966723
benober@US-C02D60ZCML85 Vault-CLI % java -jar VaultDataLoader.jar -ls /u4966723
Vault Loader. (c)Veeva Systems 2014-2021. All rights reserved.
Password:
/u4966723/Inbox
/u4966723/demo_folder
benober@US-C02D60ZCML85 Vault-CLI %
```

Create *demo\_folder* directory

Remove directory *folder1*

Move *demo\_folder* under the */u4966723* directory

# File Staging for Vault Loader CLI: View Remote Server & Create Folders



- Overview
  - Currently, our 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
  - REST API options were introduced in 20R3 to manage staged files
  - This feature introduces a set of Loader CLI commands to manage staged files
  - Empowers users to manage Staged areas without the need to use API calls

# 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

**VAULT LOADER**

**Load**

Extract

If you prefer to work from the command line, download the [Vault Loader Command Line tool](#). [Learn more.](#)

**Vault Loader: Load** ?

CSV File\*

Object Type\* **Document Attachments**

Action Type\* **Create**

Key Field **Create**  
**Delete**

☐ Record Migration Mode

☐ Document Migration Mode


☐ Include updated field values in the output log for verification.  
[This will impact the performance of the operation.](#)

?

New Object Type: Document Attachments  
New Action Types: Create and Delete

**Notifications**

11 DEC 2020

 Your Loader Job has completed

Details:

- CSV File: [Create Doc Attachments \(VPMDemo\).csv](#)
- Action Type: Create
- Object Type: Document Attachments
- Record Migration Mode: N/A
- Document Migration Mode: N/A
- Load Start Time: 11 Dec 2020 11:42 AM EST
- Duration: 0 hrs, 0 mins, 2 secs (0.87 records per second)
- **2 successes**
- 0 failures

seconds ago

- 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
  - Enables bulk upload of attachments to object records via Vault Loader
- 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

The screenshot shows the 'Vault Loader: Extract' interface. At the top, 'Object Type\*' is set to 'Documents' and 'Document Types' is set to 'Material : Promotional Piece'. Below these, there are checkboxes for 'Include Non-editable Fields', 'Only Extract Column Headers', 'Include Source Files', 'Include Renditions', and 'Override Default Column Selection' (which is checked). The 'Column Selector' section contains 'Filters' (with checkboxes for 'Show fields for selected document type', 'Show required fields', and 'Show object relationships'), a search bar, and two lists: 'Available Columns' and 'Selected Columns'. The 'Where Clause' section is at the bottom. A callout points to the 'Override Default Column Selection' checkbox, stating: 'Use the Override Default Column Selection checkbox to enable the column selector'. Another callout points to the 'Show object relationships' checkbox, stating: 'Identify which columns/fields are object/outbound relationships'. A third callout points to the 'Show required fields' checkbox, stating: 'Identify which columns/fields are related to a selected document type'. A fourth callout points to the 'Available Columns' list, stating: 'Identify which columns/fields are required for a successful load'. A fifth callout points to the token icon in the 'Where Clause' section, stating: 'Select the token icon to lookup which columns/fields are available for use in the Where Clause'. The token icon is a small blue circle with a white 'i' inside. The 'Where Clause' section shows a list of tokens, including 'draft' to 'AFP', 'MLR Apprvd' to 'Ready for Dist', 'mir\_apprvd' to 'Ready for Dist', 'Pending QC' to 'Ready for MLR', 'Ready for MLR' to 'AFD', and 'Ready for MLR' to 'AFP'.

Vault Loader: Extract ?

Object Type\* Documents

Document Types Material : Promotional Piece

☐ Include Non-editable Fields

☐ Only Extract Column Headers

☐ Include Source Files

☐ Include Renditions

☒ Override Default Column Selection

Column Selector

Filters

☐ Show fields for selected document type

☐ Show required fields

☐ Show object relationships

Search columns to add...

Available Columns

Actual MLR Start Date (actual\_mlr\_start\_date\_\_c)

AIFA Number (aifa\_number\_\_c)

Allow PDF Download (allow\_pdf\_download\_\_v)

Allow PDF Download External ID (allow\_pdf\_download\_\_v.external\_id\_\_v)

Allow PDF Download Website Name (allow\_pdf\_download\_\_v.name\_\_v)

Allow Source Download (allow\_source\_download\_\_v)

Allow Source Download External ID (allow\_source\_download\_\_v.external\_id\_\_v)

Allow Source Download Website Name (allow\_source\_download\_\_v.name\_\_v)

Selected Columns

id

Name (name\_\_v)

Restore defaults

Where Clause

Need help with Query Syntax & Structure?

draft" to "AFP"

draft\_to\_approved\_for\_production\_\_c

"MLR Apprvd" to "Ready for Dist"

mir\_apprvd\_to\_ready\_for\_dist\_\_c

"Pending QC" to "Ready for MLR"

pending\_qc\_to\_ready\_for\_mlr\_\_c

"Ready for MLR" to "AFD"

ready\_for\_mlr\_to\_afd\_\_c

"Ready for MLR" to "AFP"

ready\_for\_mlr\_to\_afp\_\_c

Actual MLR Start Date



# 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

The screenshot shows the 'Vault Loader: Extract' configuration screen. At the top, a green banner reads 'Where Clause is valid.' The left sidebar contains 'VAULT LOADER' with 'Load' and 'Extract' options. The main area has 'Object Type\*' set to 'Documents' and 'Document Types' as an empty field. Below these are five unchecked checkboxes: 'Include Non-editable Fields', 'Only Extract Column Headers', 'Include Source Files', 'Include Renditions', and 'Override Default Column Selection'. The 'Where Clause' field contains the text 'country\_\_v = 'United States''. A blue callout box with the text 'Validate Where Clause queries when extracting data using Vault Loader' has an arrow pointing to the 'Validate' button. At the bottom right are 'Cancel' and 'Extract' buttons. A link 'Need help with Query Syntax & Structure?' is located below the 'Where Clause' field.

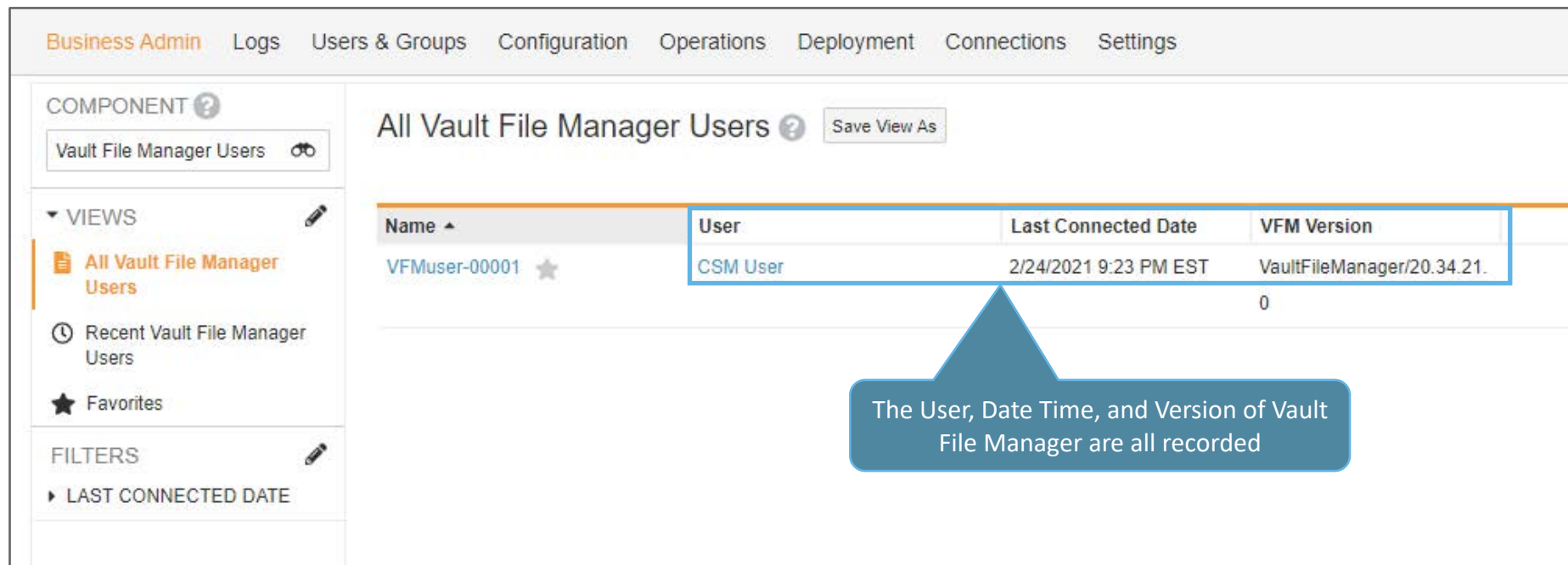


Objects

# 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



Name	User	Last Connected Date	VFM Version
VFMUser-00001	CSM User	2/24/2021 9:23 PM EST	VaultFileManager/20.34.21.

- 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](#)

Fields | Functions | Operators ?

Search Operators

If(boolean, value\_true, value\_false)

Case(expression, value1, result1, value2, result2, ..., else\_result)

<=

>=

Check Syntax

# Object Lifecycle & Workflow: Expression Enhancement



- Configuration

- Lifecycle

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

This screenshot shows the 'Entry Actions' configuration interface. The 'Always' radio button is selected. Under 'perform actions', the 'Update Record Field' action is selected and highlighted with a red box. Below this, the 'Fields\*' dropdown is set to 'Category', and the 'Set to value\*' field is empty.

This screenshot shows the 'Entry Actions' configuration interface. The 'Always' radio button is selected. Under 'perform actions', the 'Update Related Record Field' action is selected and highlighted with a red box. Below this, the 'Related Object\*' dropdown is set to 'Country', the 'Fields\*' dropdown is set to 'Reapproval Expiration Period X months', and the 'Set to value\*' field is empty.

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

This screenshot shows the 'lifecycle event action: Create Record' configuration interface. The 'Always' radio button is selected. Under 'perform actions', the 'Update Record Field' action is selected and highlighted with a red box. Below this, the 'Fields\*' dropdown is set to 'Category', and the 'Set to value\*' field is empty.

- Workflows

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

This screenshot shows the 'Create Step' configuration interface. Under 'Details', the 'Label\*' is 'Update Field step', 'Name\*' is 'uf\_s', and 'Type\*' is 'Update Record Field' (highlighted with a red box). The 'Update Field Options' section shows 'Fields\*' set to 'Category' and an empty 'Set to value\*' field.

This screenshot shows the 'Create Step' configuration interface. Under 'Details', the 'Label\*' is 'Update Related Field step', 'Name\*' is 'uf\_s', and 'Type\*' is 'Update Related Record Field' (highlighted with a red box). The 'Update Related Record Field Options' section shows 'Related Object\*' set to 'Country', 'Fields\*' set to 'Reapproval Expiration Period X months', and an empty 'Set to value\*' field.

# 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 Workflows > Claims >

### Task: Review

---

**Prompts** ?

☐ Prompt for Comments

☒ Prompt for Fields

**Fields**

Fields	Required
Additional Requirements	<input checked="" type="checkbox"/>

Rich Text field as a field prompt in a workflow task step

Object Workflows > Claims >

### Update Additional Requirements Field

---

**Details**

**Label\*** Update Additional Requirements Field

**Name\*** update\_additional\_requirements\_field —C

**Type\*** Update Record Field

**Description**

**Next Steps** End x

---

**Update Field Options** ?

**Fields\*** Additional Requirements

**Set to value\*** "<p style='color:#FF0000'>If this promotional material is being used in the <b> United States chart a must be included</b>.</p>"

Rich Text field as a workflow step

# 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**

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



# 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
- Impact
  - This feature enables users to draw attention to key pieces of information
- Use Case
  - Can be used on objects such as Medical Inquiry cases for emphasis
- Configuration
  - Admin > Configuration > Object > *Object Name* > Fields



# 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](#)

# 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

The screenshot displays the Veeva system interface for the 'Product: Cholecap'. The left sidebar shows a navigation menu with 'Health Authority Details' selected. The main content area is divided into two sections: 'Health Authority Details' and 'Documents'. The 'Documents' section contains a table of related documents. A blue callout box points to the 'Show in Tab' link, stating: 'The Show in Tab link dynamically generates a list of related documents'.

Name	Document Number	Type	Subtype	Classification
<a href="#">Physician Testimony</a>	ASSET-19000001	Component	Video	
<a href="#">VS_VerteoLogov2</a>	ASSET-19000003	Component	Images	Logos
<a href="#">CholeCap Banner</a>	ASSET-19000006	Component	Images	Graphics
<a href="#">CholeCap Logo</a>	ASSET-19000033	Component	Images	Logos

- 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 approval 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 screenshot displays the Veeva Multi-Document Workflow interface. At the top, it shows 'Components - 10/19/2020' with an 'ACTIVE' status. Below this is a green banner with a 'Return to Owner' link dated 3/10/2021 and a 'Show more' link. The main area is divided into a left sidebar with a document list (including 'Sunset (v0.1)' and 'Happy Patient Image 001a (v0.1)'), a central document viewer showing a sunset image, and a right sidebar with an 'INFORMATION' panel. The 'INFORMATION' panel has an 'Edit Fields' button highlighted with a blue box. A blue callout bubble points to this button with the text: '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

Send for Training Review

**Verdicts**

**Verdict Label\*** Approved

☐ Short-circuit tasks with the configured tags.

+ Add Comments

+ Add Capacities

**eSignature**

**Instructions**

☒ Manifest eSignature on document

+ Add Reasons

**Verdict Label\*** Rejected

☐ Short-circuit tasks with the configured tags.

+ Add Comments

+ Add Capacities

**eSignature**

**Instructions**

☐ Manifest eSignature on document

‘Manifest eSignature on document’ will be selected by default

Admins can now deselect ‘Manifest eSignature on document’

# 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 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
- 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>{select the Multi-Document Workflow}>Document Task Step

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

Select the Short Circuit Flag. Existing Tags can be selected, or new tags can be created

A new section is available for the Document Task and Admins can create new ones from the dropdown

**Medical Review**

Verdict Label\* Revise and Resubmit

☒ Short-circuit tasks with the configured tags.

☒ Every Document has this verdict

☐ At least one document has this verdict

Tags \* Not Approved

[+ Add Comments](#)

[+ Add eSignature](#)

[+ Add Reasons](#)

[+ Add Verdict](#)

**Legal Review**

Multi-document Workflows > Review >

**Details**

Label Legal Review

Name legal\_review\_\_c

Type Document Task

Description

Next Steps [Join](#)

Tags Not Approved

**Regulatory Review**

Multi-document Workflows > Review >

**Details**

Label Regulatory Review

Name regulatory\_review\_\_c

Type Document Task

Description

Next Steps [Join](#)

Tags Not Approved



# 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

Control 4 Participants

Participant Label\* Regulatory Reviewers

Add Participants\*

☐ Allow workflow initiator to select participants

☒ Use role as participants

Role allowed to participate\* Approver

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

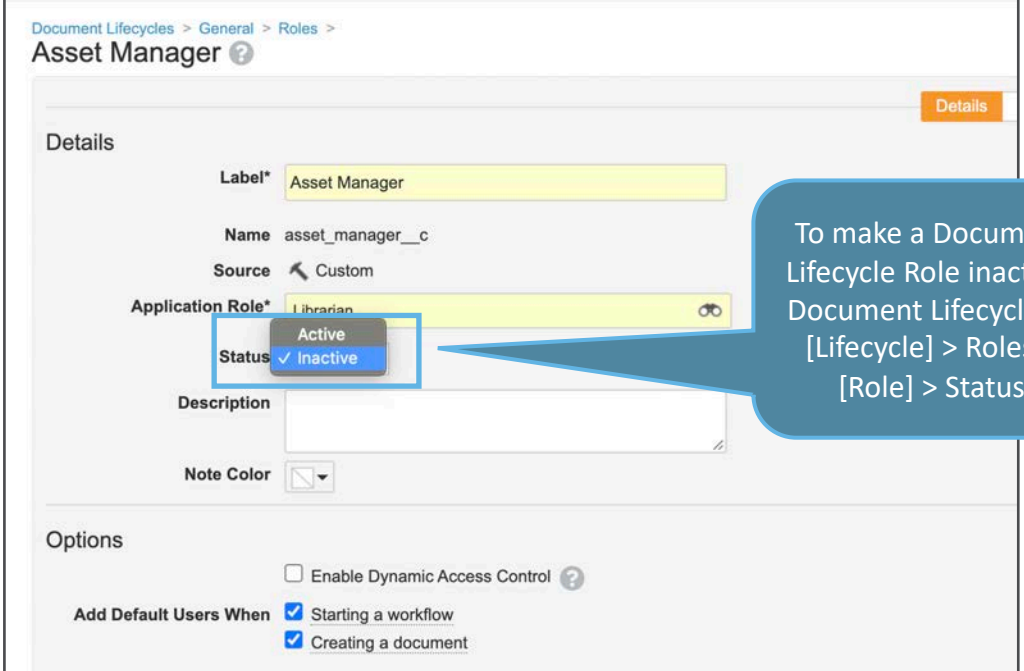
# Inactivate Roles Used in Multi-Document Workflows

- 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



Document Lifecycles > General > Roles > Asset Manager ?

Details

Label\* Asset Manager

Name asset\_manager\_\_c

Source Custom

Application Role\* Librarian

Status Active ✓ Inactive

Description

Note Color

Options

☐ Enable Dynamic Access Control ?

Add Default Users When ☒ Starting a workflow ☒ Creating a document

To make a Document Lifecycle Role inactive:  
Document Lifecycles > [Lifecycle] > Roles > [Role] > Status

# 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)

**Document Task Options**

**General Settings**

Task Label\* Document Completeness

Assign Task To\* Workflow Initiator

Instructions\* Review Document for completeness

Task Requirement\* Required

**Due Date**

Due Date Workflow Start Date

**Update Document Sharing Settings**

Update Role on Event Task Reassignment From Add Material Coordinator Coordinator

+ Add rule

You can add or remove multiple roles

# 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

Review - 01/03/2021 ACTIVE

Medical Review 06/03/2021 Show more

All Documents 1-2 of 2

Cholecap A Brighter Future (v0.1) IN REVIEW

Cholecap A Brighter Future (v0.1) Document task

Cholecap Stack - Clinical Study (v0.1) Document task

Medical Review

You have been assigned to review the document.

You have placed a verdict on 2 documents.

2 Reasons for Approval

Job Capacity\*

Reviewer

\*Required to proceed

Cancel Complete

Capacity can be provided without requiring an eSignature

# 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

Prompts ?

☐ Prompt for Document Fields: One field value that applies to all documents

☒ Prompt for Verdicts: One verdict for each document

Verdicts

Verdict Label\* Ready for Approval

☐ Short-circuit tasks with the configured tags.

+ Add Comments

+ Add Capacities

+ Add eSignature

+ Add Reasons

The option to Add Capacities is now available within the task verdict

Medical Review

Verdicts

Verdict Label\* Ready for Approval

☐ Short-circuit tasks with the configured tags.

+ Add Comments

Capacity Label\* Job Capacity ☒ Required

Capacity Values\*

Editor

Reviewer

Approver

Type new value and hit 'Enter' to add

+ Add eSignature

+ Add Reasons

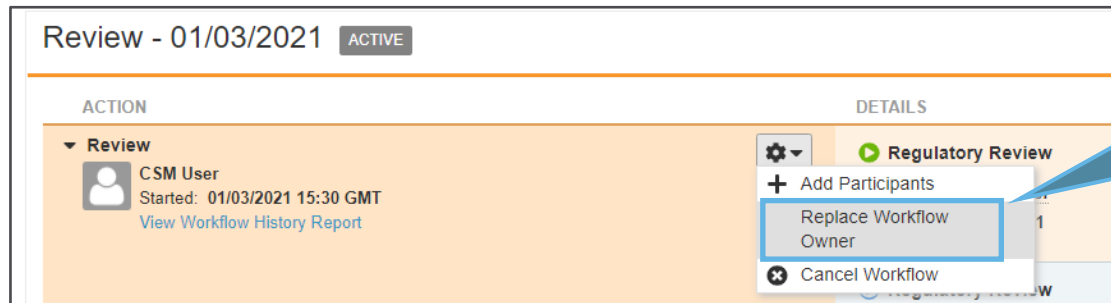
Provide a Capacity label as well as Capacity values within the task verdict

# 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

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

DOCUMENT SETUP  
Document Types  
Document Fields  
Field Dependencies  
Field Layout  
Rendition Types  
Searchable Object Fields  
Document Tags  
Rendition Profiles

OBJECT SETUP  
Objects

REPORT SETUP  
Report Types  
Report Views

Multi-document Workflows > Review >  
**Notification: New State**

**Details**

Label\* Notification: New State  
Name\* notification\_new\_state  
Type\* Notification  
Description  
Next Steps End

**Notification Options**

Message Template\* State notification  
Recipient\* Workflow Initiator

PARTICIPANTS  
Medical Reviewers  
Legal Reviewers  
Regulatory Reviewers  
Workflow Initiator

ROLES  
Approver  
Assigned To  
Checklist Respondent  
Compliance Package Publisher  
Consumer  
Content Creator  
Coordinator

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

DOCUMENT SETUP  
Document Types  
Document Fields  
Field Dependencies  
Field Layout  
Rendition Types  
Searchable Object Fields  
Document Tags  
Rendition Profiles

OBJECT SETUP  
Objects

REPORT SETUP  
Report Types  
Report Views

Object Workflows > Batch Approval >  
**Notify workflow initiator**

**Details**

Label\* Notify workflow initiator  
Name\* notify\_workflow\_initiator  
Type\* Notification  
Description  
Next Steps End

**Notification Options**

Message Template\* State notification  
Recipient\* Workflow Initiator

PARTICIPANTS  
Approver  
Workflow Initiator

ROLES  
Coordinator  
Editor  
Owner  
Viewer

# 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

The Verdict, Comments, Reason and Capacity all now show in the Timeline View

Name	Verdict	Reason	Comment
Cholecap A Brighter Future	Ready for Approval		No changes required, ready for approval.
Cholecap Stack - Clinical Study	Revise and Resubmit	Missing Supporting Documents	



# 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
  - Capacity information will show outside of the table as there is only one capacity for multi verdict Multi-Document Workflow tasks

# 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 utilize this feature to hide that Role when starting the Multi-Document Workflow

Multi-document Workflows > Review >

### Send For Review

Control 4: Participants

Participant Label Regulatory Reviewers

Role allowed to participate

☐ Allow task instructions for these participants

☐ Default users from sharing settings

**Start Step Rule** ? Edit

Rule Label	Hidden Controls
Country Rule	Regulatory Reviewers

# 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 Manager or Managed Services Consultant
- Email: [VaultCustomerSuccess@veeva.com](mailto: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/>





Thank you





# Appendix



# 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

# Commercial Data Model Changes (MedComms)



- Overview
  - Added the following new objects:
    - *Event* (event\_\_v) with the object types *Base Event* (base\_\_v) and *Adverse Event* (adverse\_event\_\_v)
    - *Event Report Type* (event\_report\_type\_\_v)
    - *Event Reporter Qualification* (event\_reporter\_qualification\_\_v)
    - *Event Gender* (event\_gender\_\_v)
    - *Event Outcome* (event\_outcome\_\_v)
  - Added new document lifecycle *Event Generated Document* (event\_generated\_document\_\_c)
  - Added new object lifecycle *Event* (event\_lifecycle\_\_v)
  - Added new document type *Individual Case Safety Reports* (ICSR) (individual\_case\_safety\_reports\_\_v) with document subtype *E2B(R3)* (e2br3\_v)
  - Added new shared document field *Related Event* (related\_event\_\_v)
  - Added new user action *Generate E2B Report*
  - Added new notification *Generate E2B Report*
- View the full [Release Notes](#)

# 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.

# 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

# 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)



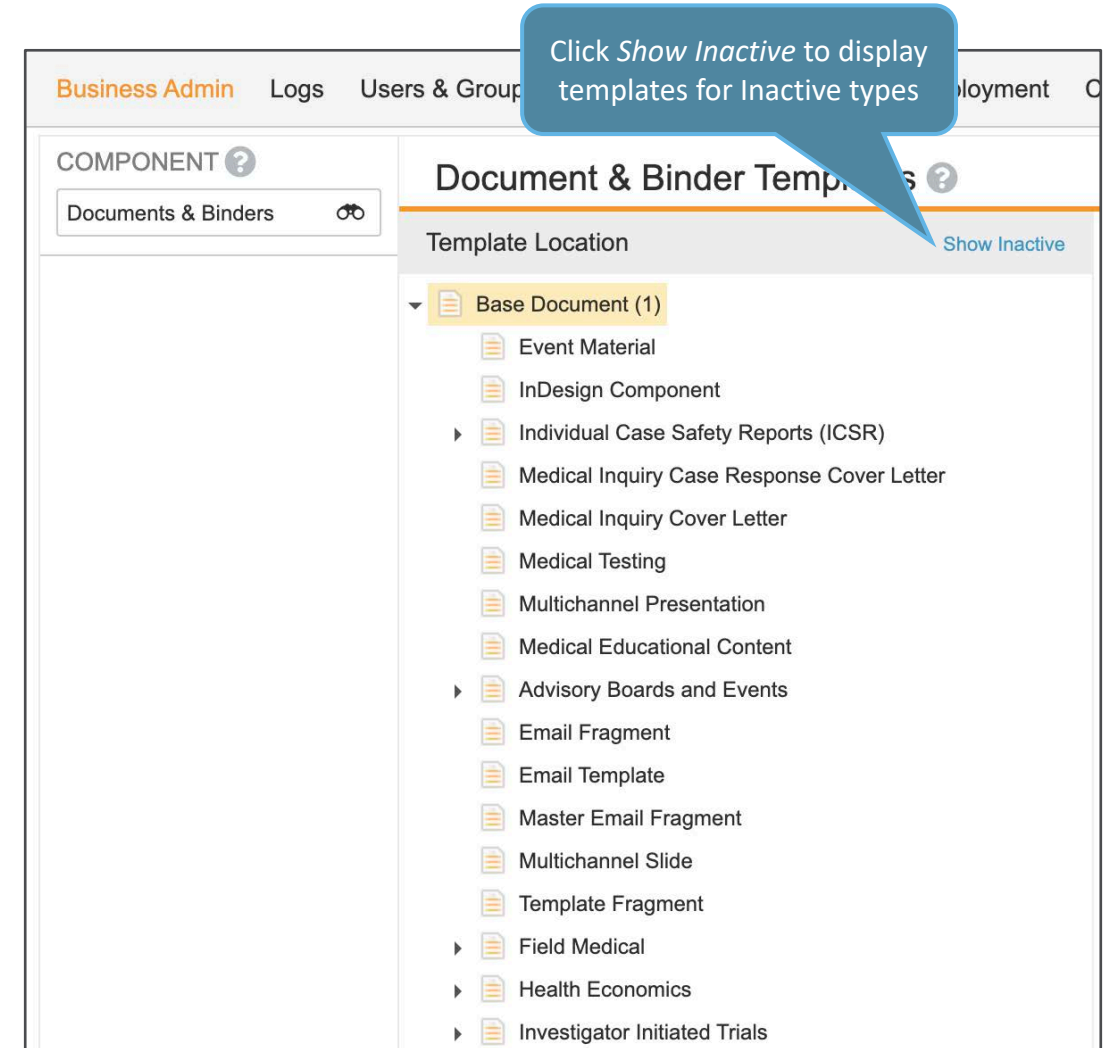
- Added the following new object lifecycles:
  - *Content Module Asset Lifecycle* (content\_module\_asset\_lifecycle\_\_v)
  - *Content Module Lifecycle* (content\_module\_lifecycle\_\_v)
- Added the following new picklists:
  - *Rule Type* (rule\_type\_\_v)
  - *Text Element Type* (text\_element\_type\_\_v)
- 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)

# Templates: Hide Inactive Document Types



- Overview

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





# 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](#)