



Marisabel Navarro

# Drug Development Veeva Vaults

Click the Start button to begin

- ≡ Introduction
- ≡ New Features - Highlighted
- ≡ Existing Features - Enhanced
- ≡ Notifications Page
- ≡ Improved Lifecycles and Workflows
- ≡ Annotations
- ≡ Summary

# Introduction

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Click the arrow to listen

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Play this short video for an introduction identifying changes coming on December 4th to the Unified Clinical Vault (UCV), Quality Management System (QMS), and Regulatory Document Management System (RDMS).

**- Vault environments do vary based on configurations -**

Click the arrow to play the video

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**CONTINUE**



Click the arrow to listen

Click to flip each card below and learn 3 facts about the upcoming interface changes.



A new more intuitive Vault  
User Interface (UI)  
is coming  
December 4th 2021



From gray to navy blue,  
the new top banner, is  
now more modern  
and functional



Notifications  
are moving from the  
Home tab to the right of the  
top banner

CONTINUE

# New Features - Highlighted

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▶ ● 00:08

*Click the arrow to listen*

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**"This new user interface makes end users more productive by reducing the number of clicks needed to perform frequently used actions."**

**CONTINUE**

▶ ● 00:10

*Click the arrow to listen*

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Click each Information (i) dot on the new interface screen samples below.

Each information panel displays an image that you can click to enlarge and audio that you can play.

The screenshot displays the Vault interface for a document titled "000000111010 Site Evidence of Training (v0.1)". The interface includes a top navigation bar with "Vault" logo, "All Documents" dropdown, "Search All Library" search bar, and "Unified Clinical Phas..." dropdown. Below the navigation bar are tabs for "Home", "Study Info", "Planning", "Library", "TMF Viewer", "Document Issues", "Study Startup", and "Global Directory". The main content area shows the document title and a status dropdown menu with "In Progress" and "Approved" options. The document content is displayed in a viewer with a toolbar at the top and a scroll bar on the right. The right sidebar contains an "INFORMATION" panel with a "General" section listing document details: Name, Document Type, Type, Subtype, Classification, and Document Number. A "Reclassify" link is also present. Red boxes and "i" icons highlight various elements: the top navigation bar, the document title, the status dropdown, the document viewer toolbar, the document content, the scroll bar, the information panel, and the document details.

000000111010 Site Evidence of Training (v0.1)

In Progress  
Approved

[Title Here, up to 12 Words, on One to Two Lines]

[The body of your paper uses a half-inch first line indent and is double-spaced. APA style provides for up to five heading levels, shown in the paragraphs that follow. Note that the word *Introduction* should not be used as an initial heading, as it's assumed that your paper begins with an introduction.]

[Heading 1]

INFORMATION

General

Name 000000111010 Site Evidence of Training

Document Type test2

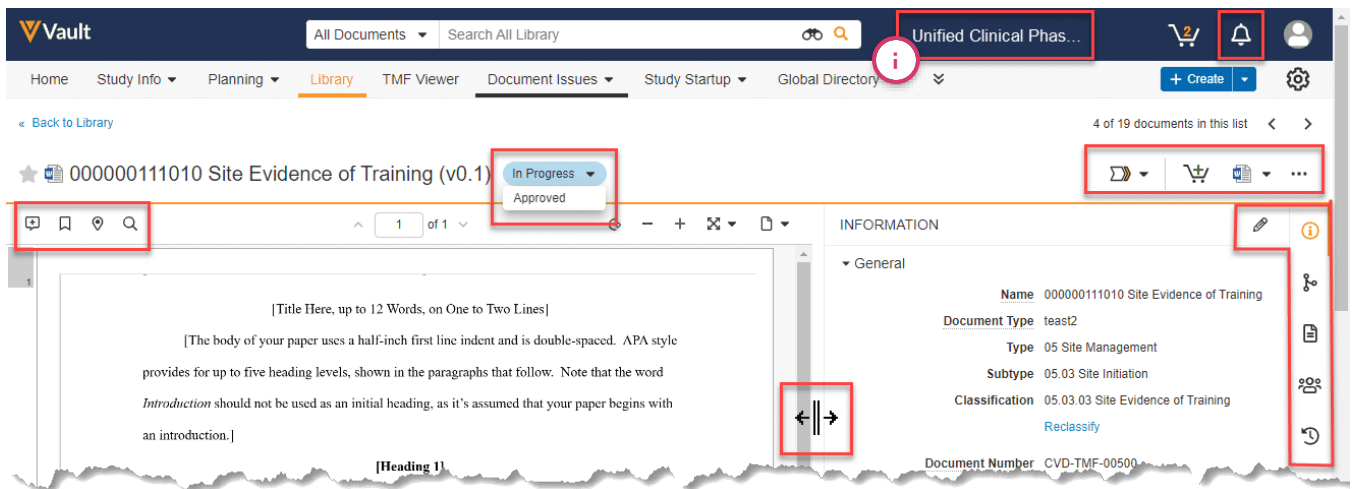
Type 05 Site Management

Subtype 05.03 Site Initiation

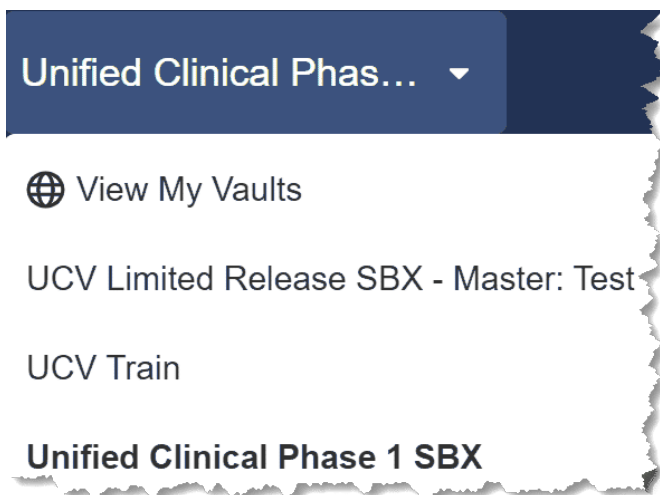
Classification 05.03.03 Site Evidence of Training

Reclassify

Document Number CVD-TMF-00500

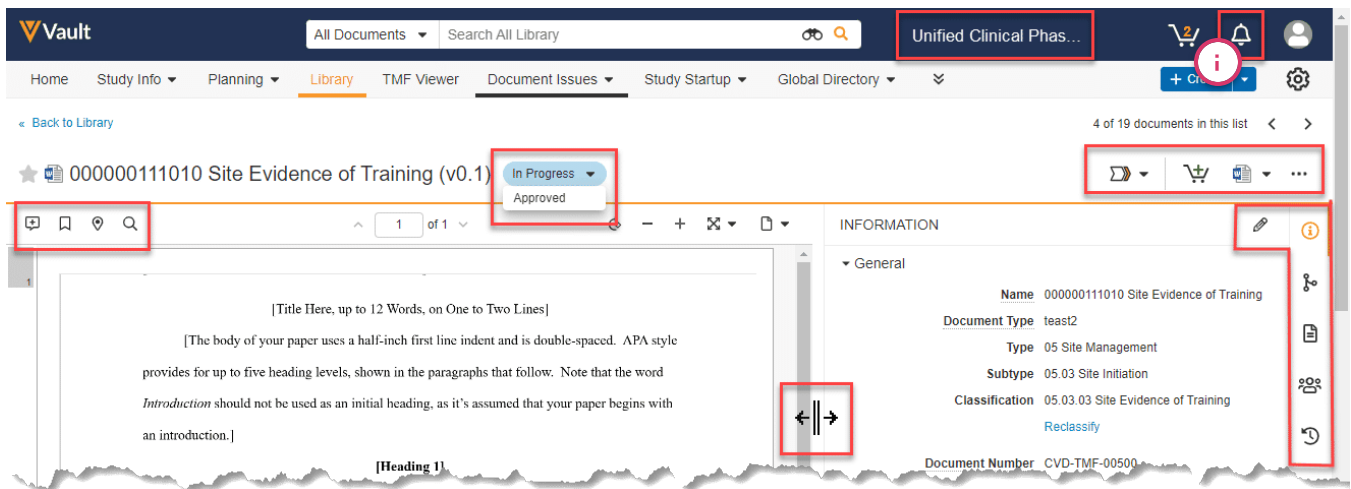


## Top Menu Bar

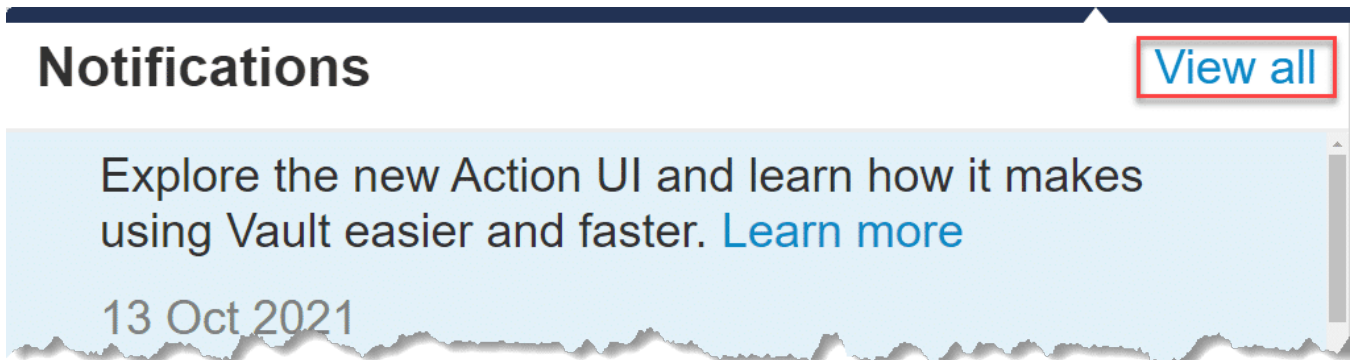


The top menu bar now has a modernized look and feel. The previous version was gray and this new release is navy blue. There is more spacing and new icons.

If you have access to multiple Vaults, they now appear in the top bar as a dropdown menu and in alphabetical order.



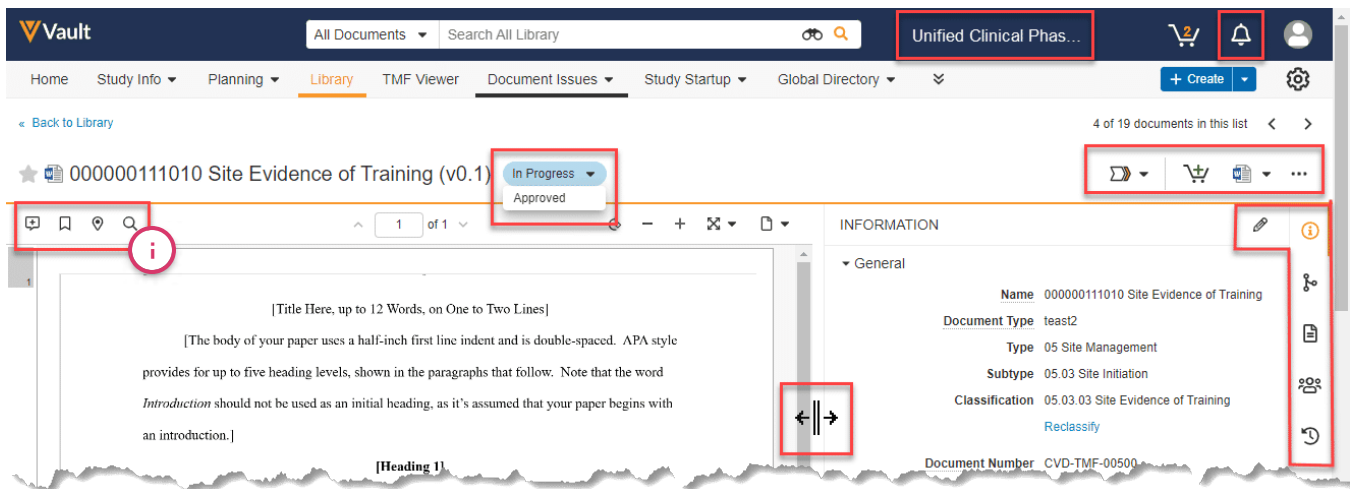
## Notification Badge



The Notifications were moved from the Home page to a 'bell' icon that is accessible from anywhere in the vault.

You can click on the icon for a dropdown menu. Click "View All" to open the Notifications page.





## Left Document Tool Bar



1



2



3



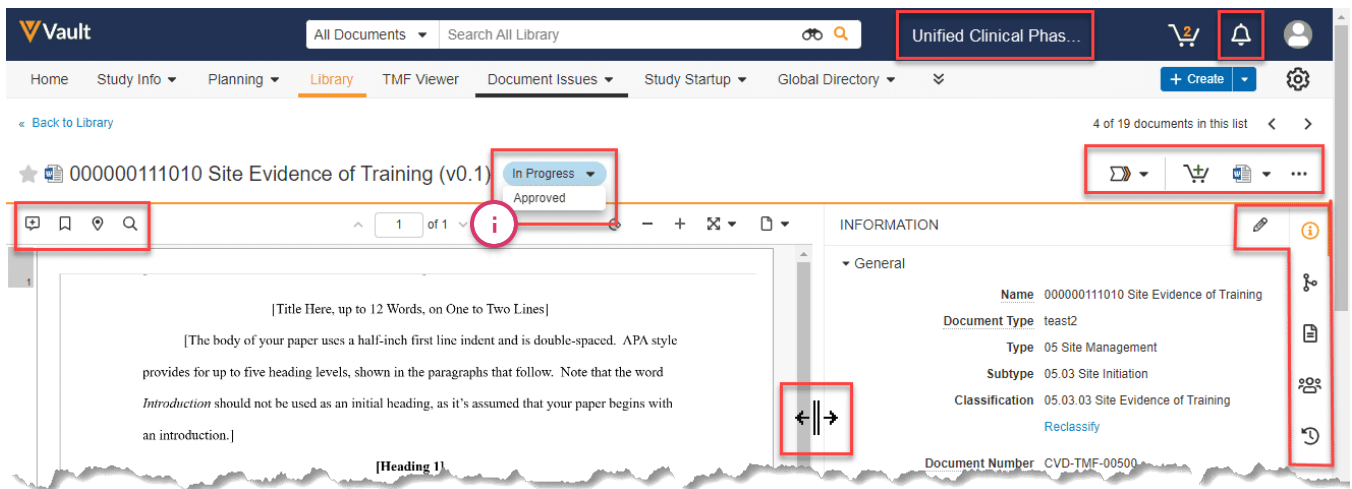
4



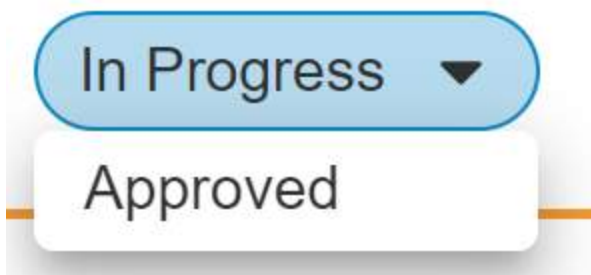
From left to right, these are the icons:

1. View Annotation
2. Open bookmarks
3. Open destinations
4. Find in Document

Streamlined action panel for Documents information with adjustable page width/spacing, simplified Annotation toolbar, and consolidated Collaborative Authoring menu.

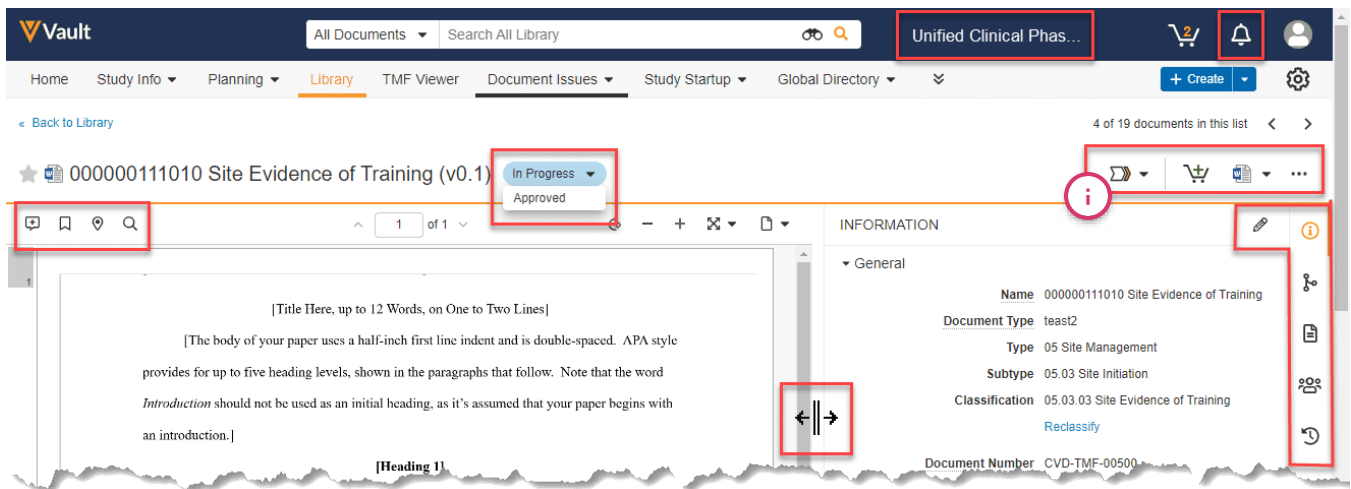


## Status Button Dropdown



The Document Lifecycle State will continuously update on the Action Bar.

Users with the correct permissions can change states directly from this new dropdown.



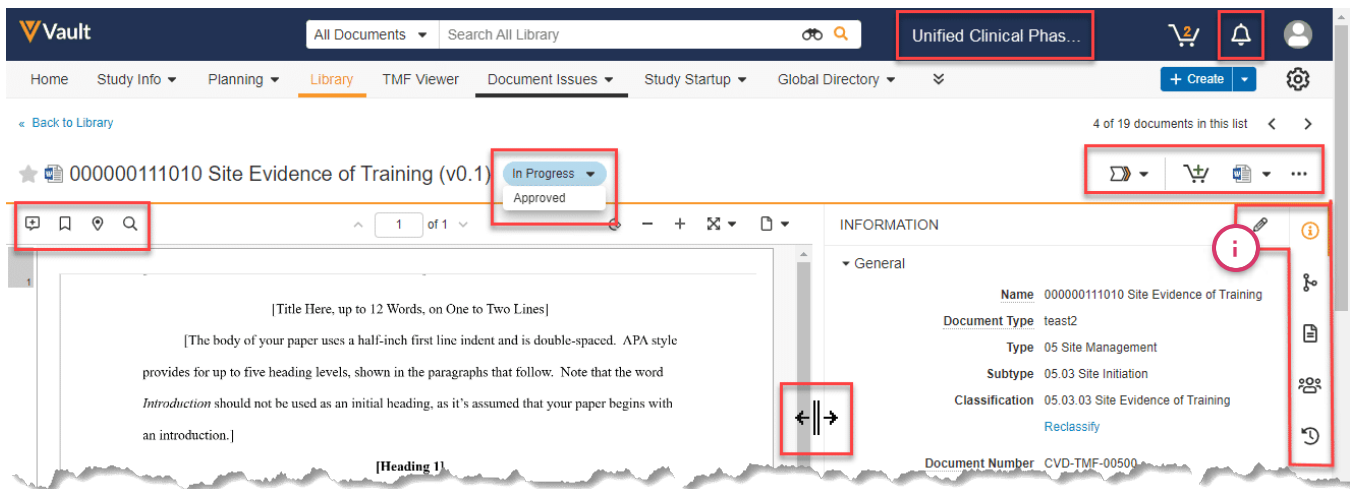
## Right Top Tool Bar



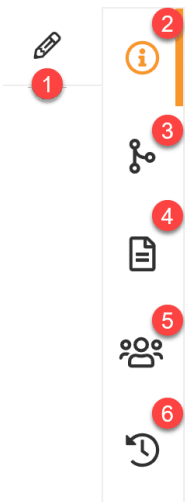
From left to right, the icons are:

1. Workflow Actions
2. Add to Cart
3. Source Document
4. All Actions button (3 Dots)

This toolbar learns from user habits and shows the most frequently used actions for records and documents.



## Right Side Document Tool Bar



From top to bottom, the icons are:

1. Edit fields
2. Document Information  
(Show or Hide)
3. Relationships
4. Document Files
5. Sharing Settings

## 6. Timeline View

Vault

All Documents Search All Library

Unified Clinical Phas...

Home Study Info Planning Library TMF Viewer Document Issues Study Startup Global Directory

4 of 19 documents in this list

000000111010 Site Evidence of Training (v0.1)

In Progress Approved

[Title Here, up to 12 Words, on One to Two Lines]

[The body of your paper uses a half-inch first line indent and is double-spaced. APA style provides for up to five heading levels, shown in the paragraphs that follow. Note that the word *Introduction* should not be used as an initial heading, as it's assumed that your paper begins with an introduction.]

[Heading 1]

INFORMATION

General

Name 000000111010 Site Evidence of Training

Document Type test2

Type 05 Site Management

Subtype 05.03 Site Initiation

Classification 05.03.03 Site Evidence of Training

Document Number CVD-TMF-00500

## Drag to Resize



When the cursor turns into a double line with two arrows, the panels can be resized.

Vault Quality

Quality Issues Search Quality Issues

Home Dashboards Reports Change Management Quality Issues Audits Audit Programs Supplier Quality

1 of 1343 records in this list

CDD Quality Issue: QE-00000001 In CAPA Planning

Workflow Timeline

Quality Team

Quality Issue Owner

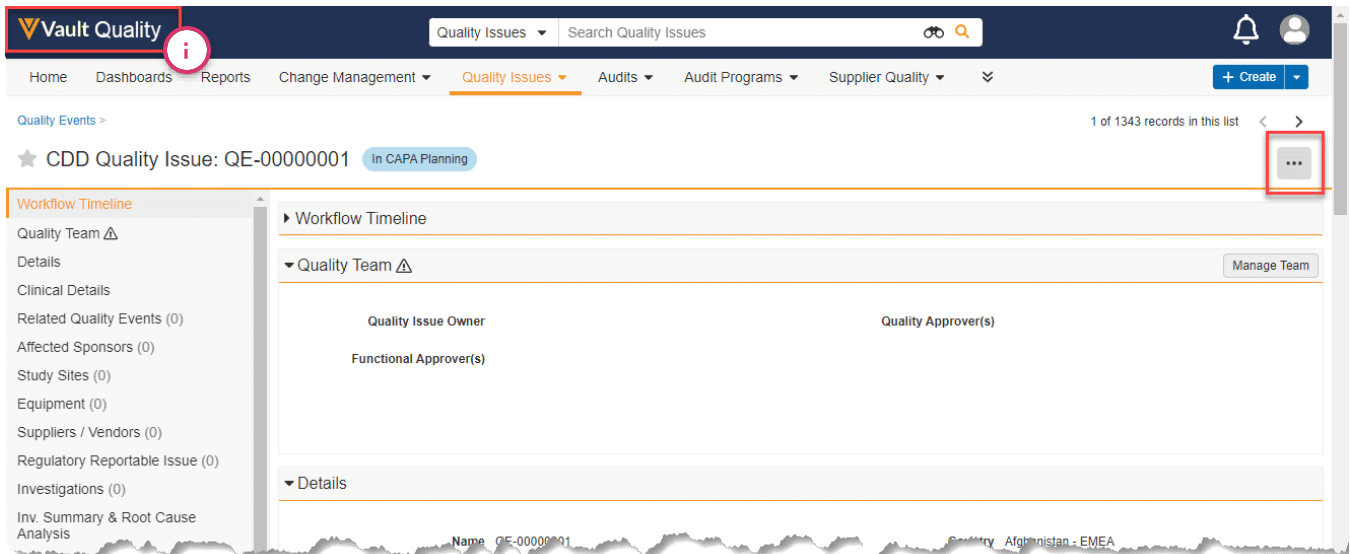
Quality Approver(s)

Functional Approver(s)

Details

Name: QE-00000001

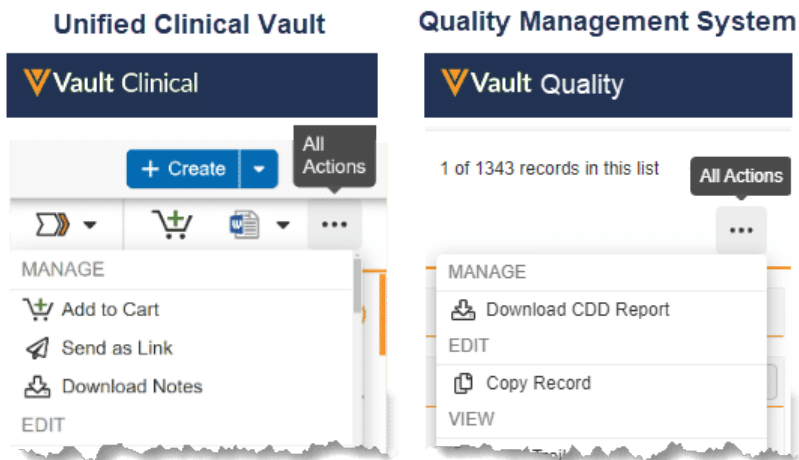
Country: Afghanistan - EMEA



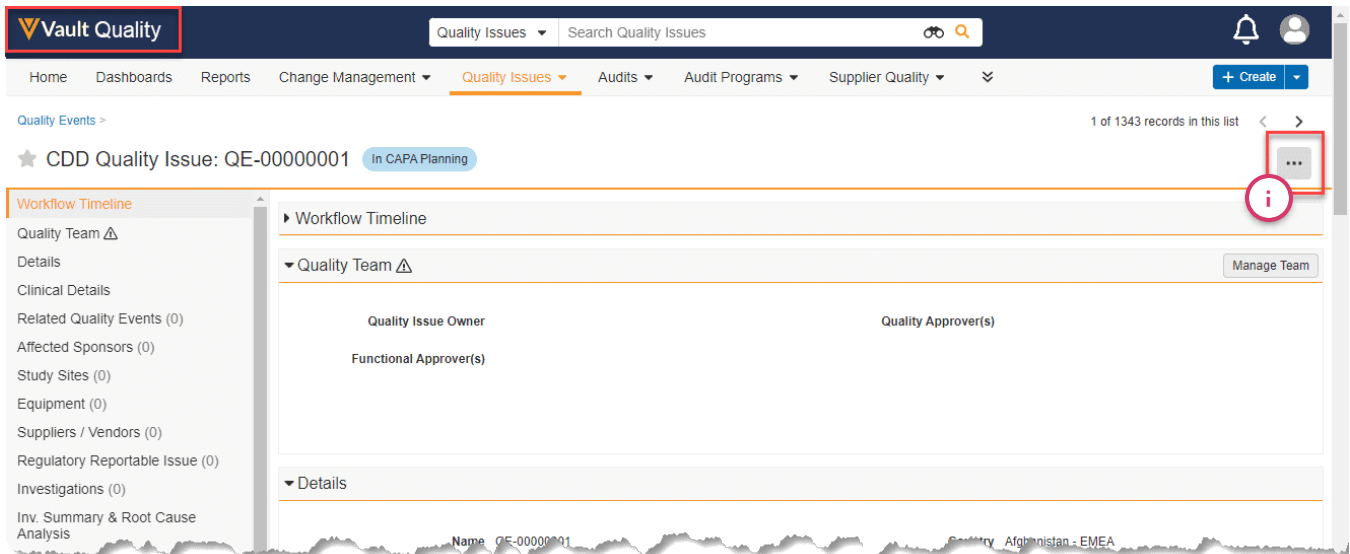
## Vault Quality - Object Based



00:10



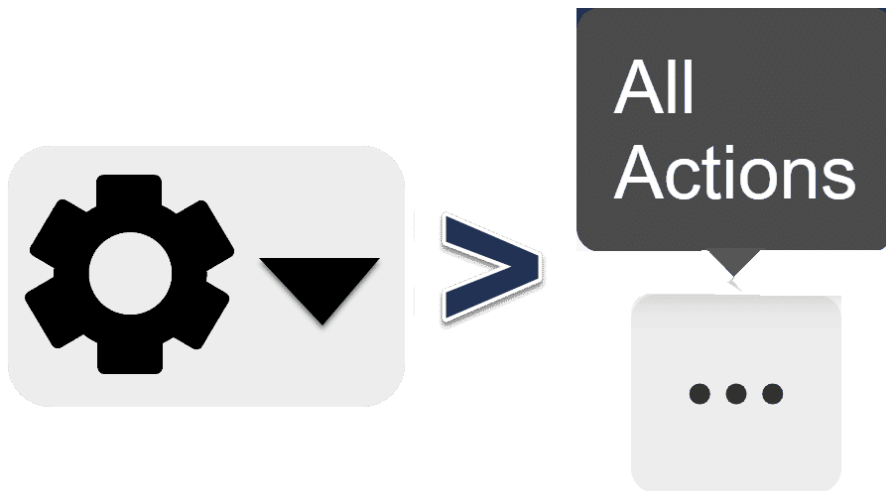
Many of the new features don't apply to the Quality Management System (QMS) because QMS is an object based environment.



## The Actions Menu - Ellipsis



00:21



It changed from a gear to the 3 dots.

This menu displays all actions you have available for the selected document or record, and it varies by Vault configuration, lifecycle state, create permissions, license type, security profile, and role-based permissions on the document or record.

CONTINUE





# Existing Features - Enhanced

 Marisabel Navarro

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*Click arrow to play*

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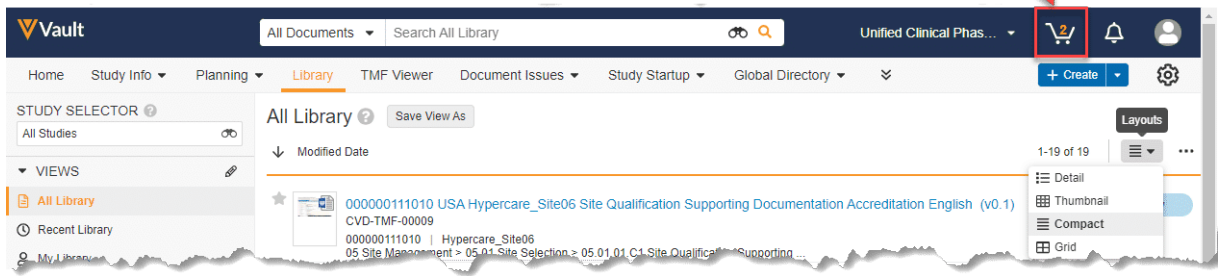
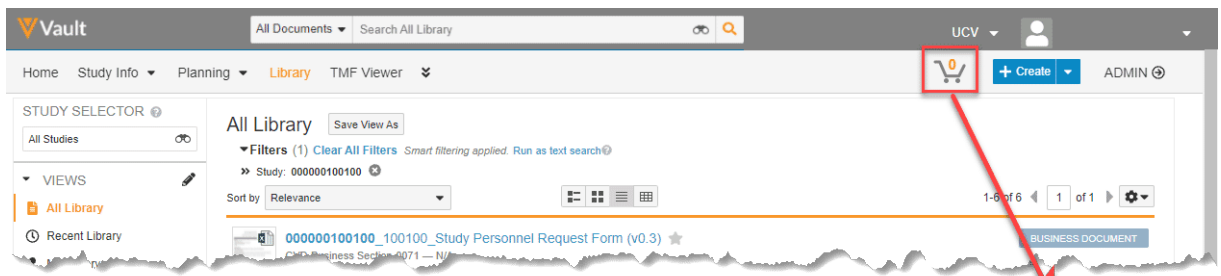
## Where are they now?

Click the plus sign (+) next to each feature to learn more.

### 1. Document Shopping Cart

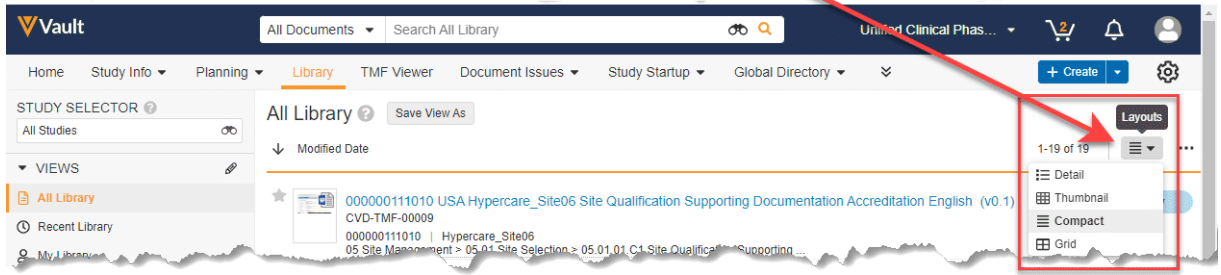
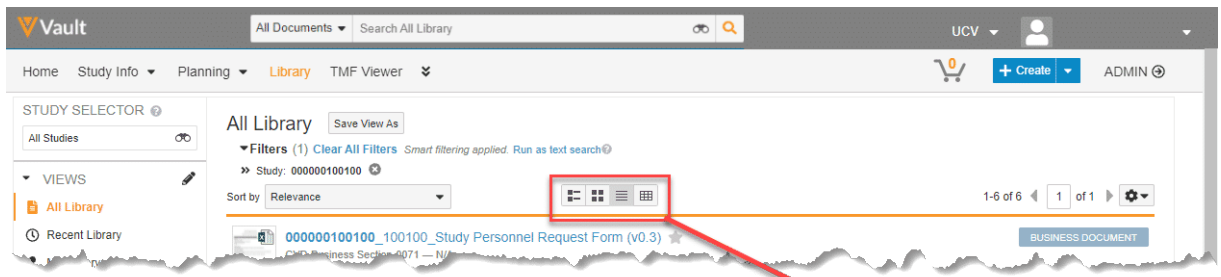
The Document shopping cart moved to the right side of the top banner.

*Click the image to enlarge.*



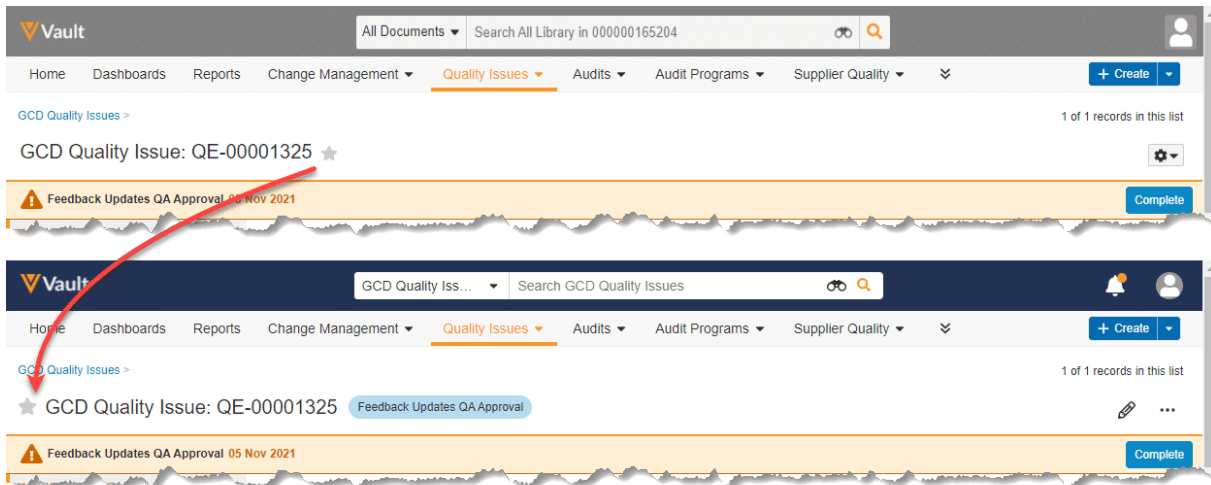
## 2. Library Views

The views are now dropdown menu and moved from the center of the Library screen to the the action bar.  
*Click the image to enlarge.*



## 3. Favorites

The star moved from the end of the Document title to the left of the Document icon.  
*Click the image to enlarge.*

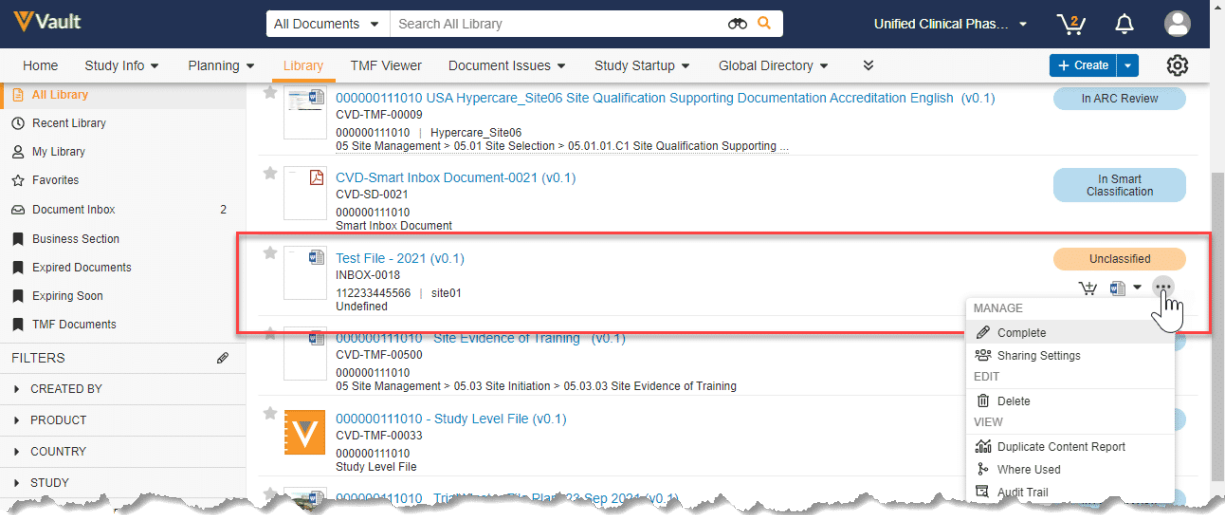


00:18

*Click arrow to play*

## Document List

When on the Detailed, Thumbnail or Compact View, the Documents have their own Action Menu.



Click image to enlarge

CONTINUE

# Notifications Page

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00:19

*Click the arrow to listen*

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## 1. Bell Notifications

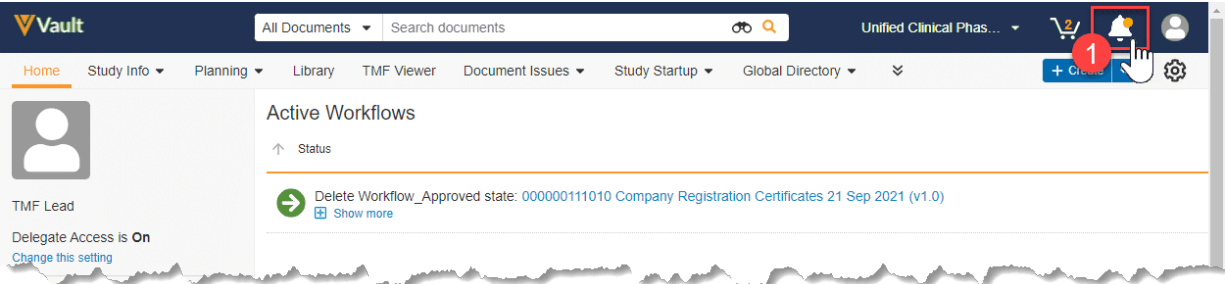
A new global notification icon makes it easier for Vault users to become aware of documents, records, and tasks that need their attention. When users receive a notification, the bell icon in the top right hand corner of the screen alerts them by displaying an orange notification dot.

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- Notification bell with messages pending

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*Click image to enlarge*



- Notification bell with no messages pending

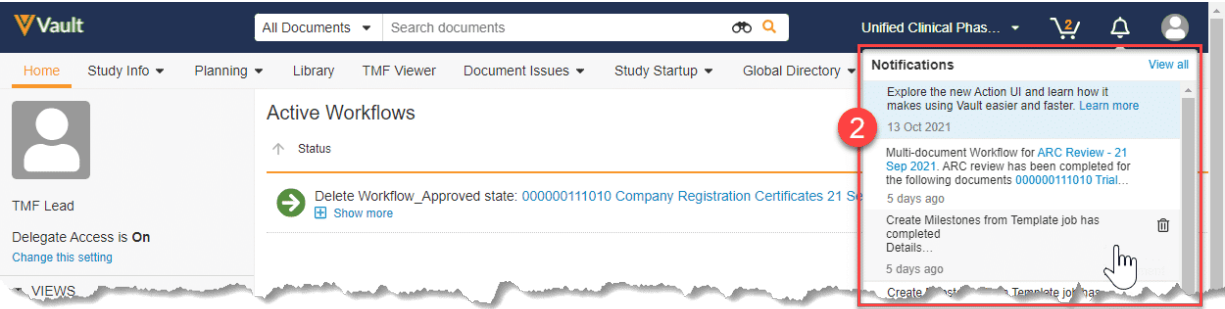


*Click the arrow to listen*

## 2. Notifications Panel

The new enhanced Notification Panel displays the summary of the notifications. Hover over a notification to open hyperlinks or delete them.

Clicking the "View All" hyperlink will open the Notifications Page.



*Click image to enlarge*



00:19

*Click the arrow to listen*

### 3. Notifications Page

This page may display up to 1000 notifications. Notifications can also be deleted from this page and sorted by Date Received or filtered by tasks, your @ mentions, shared views, and documents or objects sent to you via links from the VIEWS left panel.



The screenshot shows the Vault application interface. At the top, there is a navigation bar with the Vault logo, a search bar for documents, and a user profile icon. Below this is a secondary navigation bar with various menu items like Home, Study Info, Planning, Library, TMF Viewer, Document Issues, Study Startup, and Global Directory. A sidebar on the left lists 'VIEWS' including All Notifications, Tasks, User Mentions, Shared Views, and Send As Link. The main content area is titled 'All Notifications' and shows a list of notifications. A red box highlights the first notification, which is dated '28 OCT 2021'. The notification text reads: 'Create Milestones from Template job has completed'. Below this, it says 'Details' and lists several bullet points: 'Create Milestones from Template for Study Site "6040018" completed', 'Start time: 28 Oct 2021 5:21 AM PDT', 'Duration: 0 hrs, 0 mins, 0 secs', '0 Milestone records created', '0 Milestone records failed', '0 Milestone Dependency records created', '0 Milestone Dependency records failed', '0 Expected Document List records created', and '0 Expected Document List records failed'. A red circle with the number '3' is placed over the 'All Notifications' link in the sidebar. A hand cursor icon is visible over the notification details.

Click image to enlarge

CONTINUE

# Improved Lifecycles and Workflows

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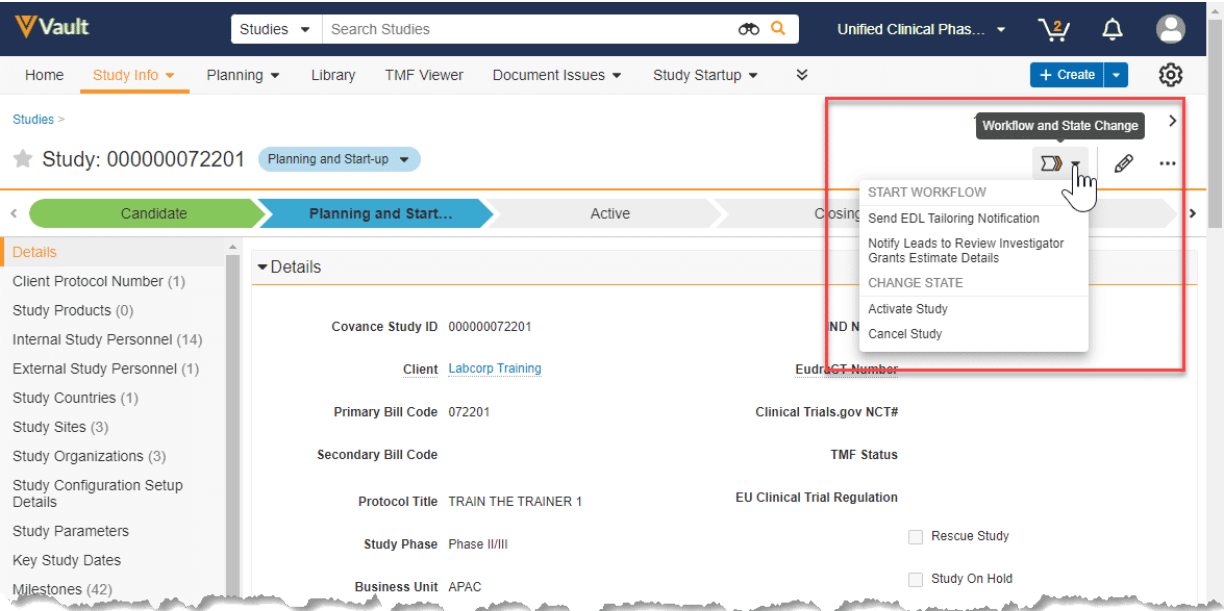


*Click the arrow to listen*

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## Workflows, now have...

- Their own dedicated dropdown menu, with available actions for your document or object
- A Fix button, exclusive for Workflows, if the document is available for a Workflow in this particular state, and you have permission to start a Workflow or make a direct state change



Click image to enlarge



00:21

Click the arrow to listen

## Workflows State Change Action

- A new dropdown menu arrow within the current document state label allows for an easy state selection.
- Users with the correct permissions can change states directly from this new dropdown, in addition to the workflow menu action.

Client Protocol Number (1)  
Study Products (0)  
Internal Study Personnel (14)  
External Study Personnel (1)  
Study Countries (1)  
Study Sites (3)  
Study Organizations (3)  
Study Configuration Setup  
Details  
Study Parameters  
Key Study Dates  
Milestones (4)

Covance Study ID	00000072201	IND Number	
Client	Labcorp Training	EudraCT Number	
Primary Bill Code	072201	Clinical Trials.gov NCT#	
Secondary Bill Code		TMF Status	
Protocol Title	TRAIN THE TRAINER 1	EU Clinical Trial Regulation	
Study Phase	Phase II/III	<input type="checkbox"/> Rescue Study	
Business Unit	APAC	<input type="checkbox"/> Study On Hold	

Click image to enlarge

CONTINUE

# Annotations

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*Click the arrow to listen*

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- 1** The new interface has been updated with a simplified and modern annotations toolbar.
- 2** Create annotation cards with ease.
- 3** Edit and resolve comments from the cards' Action Menu.

The screenshot displays the Vault application interface. At the top, there is a navigation bar with the Vault logo, a search bar containing "All Documents" and "Search All Library", and a user profile icon. Below the navigation bar, a menu includes "Home", "Study Info", "Planning", "Library" (highlighted), "TMF Viewer", "Document Issues", "Study Startup", and "Global Directory". A "Create" button is also visible. The main content area shows a document titled "00000111010 USA Hypercare\_Site06 Site Qualification Supporting Documentation Accreditation English (v0.1)" with a status of "In ARC Review". A message states "This document is in an active workflow." Below this, there are several panels: a "Comment" panel with options for "Line", "Link", and "Anchor"; a "Note" panel with a "Select action" dropdown menu containing "Edit", "Delete", "Move", and "Hide"; and an "INFORMATION" panel with a "General" section listing document details such as Name, Document Type, Site Qualification Supporting Doc Type, Type, Subtype, Classification, Document Number, Study, and Study Country. Three blue circles with numbers 1, 2, and 3 are overlaid on the interface to highlight specific elements: circle 1 points to the Comment panel, circle 2 points to the Note panel, and circle 3 points to the "Select action" dropdown menu.

Click the image to enlarge

CONTINUE

# Summary

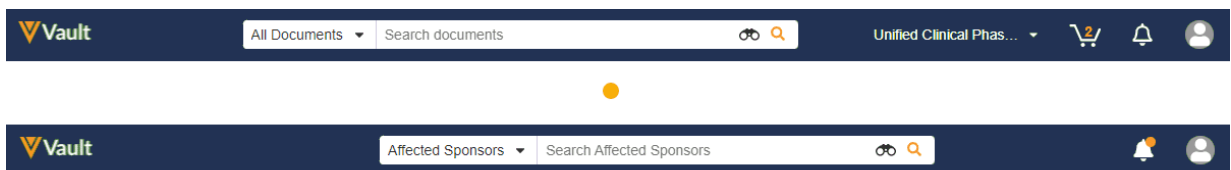
 Marisabel Navarro

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## Key Takeaways

Updates to the banner include color, spacing and icons.



*Click the image to enlarge*

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The Ellipsis icon replaced the gear on the Action menu.



*Click the image to enlarge*

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**Some icons have Action UI hover help text for easy action searches.**





*Click the image to enlarge*


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**Dedicated Workflow menu and easy change of state option**



★  000000111010 Site Evidence of Training (v0.1) In Progress 

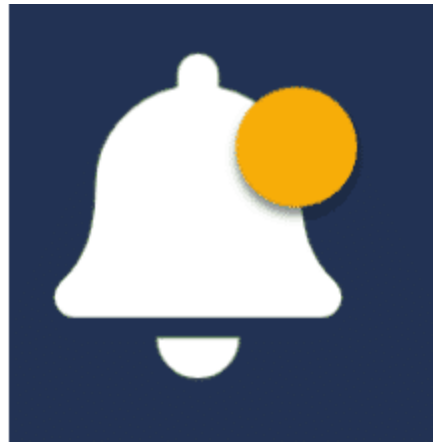
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★  000000111010 Site Evidence of Training (v0.1) In Progress Approved

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*Click the image to enlarge*

**Bell notification icon and new notification page.**



*Click the image to enlarge*

**VAULT CONTACTS**

[Quality Systems Support Page](#)  
[\(QMS\)](#)

[Unified Clinical Vault Support](#)  
[\(UCV\)](#)

**RDMS questions can be directed to**

**[rdms@labcorp.com](mailto:rdms@labcorp.com)**

**CLICK HERE TO COMPLETE THIS COURSE - THANK YOU!**