# Veeva Vault

## Portal Access

Portal-only users (users with the *Portal Experience User* security profile) log into Brand Portal directly through the Vault login page. PromoMats or MedComms users who don't have the *Portal Experience User* security profile but who have *Read* permission on *Portal* object records can access their Portals through **Business Admin** or a custom tab.

## Portal Access

Users with access to multiple Portals land on the Portal Selector page at login. Click a Portal's name to navigate to that Brand Portal. Once in a Portal, you can access the Portal Selector through the drop-down menu next to the Portal logo. If you navigate to other pages within the portal, you can also click the Portal Logo to navigate back to the Portal Homepage.

## About the Brand Portal Home Page

The Brand Portal Homepage houses widgets through which you can easily find relevant content:

- **Carousel:** The Carousel displays your Portal's most important content as a click-through banner at the top of the Portal Homepage.
- **Content Filters:** Content Filters are saved search views that display filtered content for your brand.
- **Announcements:** On the Announcements page, Brand Managers can share information and updates with all Portal Users.
- **About Section:** In the About section, your Brand Manager provides a quick description of the Portal.
- **Featured Items:** In the Featured Items section, you see the top content for your brand, curated by your Brand Manager.
- **Most Popular:** Vault automatically updates the Most Popular section with the most downloaded *Steady* state documents in your Portal.
- **Recently Added:** Vault automatically updates the Recently Added section with the newest *Steady* state documents in your Portal.
- **Related Portals**: This section lists all Portals associated with the current one.

## Using the Portal

When you hover over content in your Portal Homepage or Portal Library, Vault displays key information and options for quickly interacting with your document:

- **View Full Details:** Click the **View Full Details** button ( ) to see the full document or binder in the document viewer. Use to breadcrumb trail to navigate **Back to Portal** from a document.
- **Add to Cart:** Click the **Add to Cart** button ( ) to add the document to your cart.
- **Download:** Click the **Download** button ( ) to download the document's source file. Note that you can only download documents from the Quick Look viewer. To download Binders, click View Full Details or add them to your Cart.
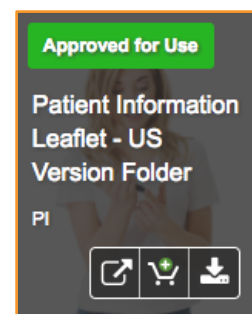
## Using the Quick Look Viewer

Clicking a document in the Portal Homepage or Portal Library launches a Quick Look viewer that displays key document details, including the document's name, status, document type, and description, as well as document interaction options. Click the left and right navigation arrows to browse through the documents in the widget or library. Click **X** to exit the Quick Look viewer.
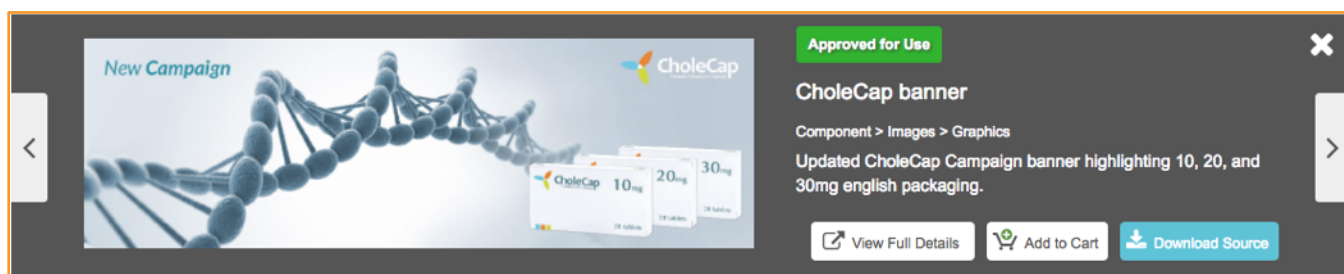


## Content Filters

Click a Content Filter icon to navigate to the content associated with the saved search. associated content.



When you click a Content Filter, Vault navigates you to a filtered view of your Library. You can also access your other Content Filters from the left-hand panel of your Library. Clicking another Content Filter from your Library displays all documents associated with that Content Filter in the Library view.
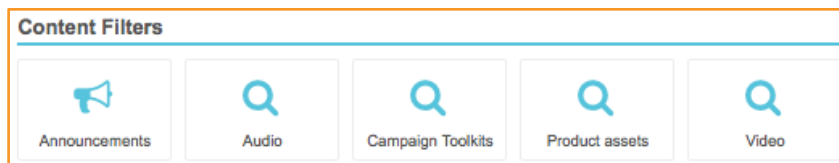
## Announcements

Brand Managers can make portal-wide announcements and share information through the **Announcements** page. Click the **Announcements** icon (megaphone) in the *Content Filters* section to navigate to the Announcements page. Announcements appear in chronological order, with the most recent announcements at the top of the page. Use the Announcements search bar to search for older announcements in your Portal.
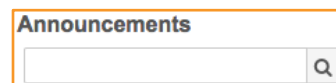


## Download with Cart

With Cart, you can download multiple documents at once. To download with Cart:

1. Add documents to your **Cart** from the Portal Homepage, Portal Library, or a document's Doc Info page using the cart button with the green plus (**+**) symbol (  ). If a document is already in your cart, the button displays with a red minus (**-**) symbol.
2. Click the **Cart** icon (  ) in the vault navigation bar to navigate to your cart.
3. Click **Download**; Vault generates a ZIP file containing all documents in your cart.