

Vault Mobile

User Guide

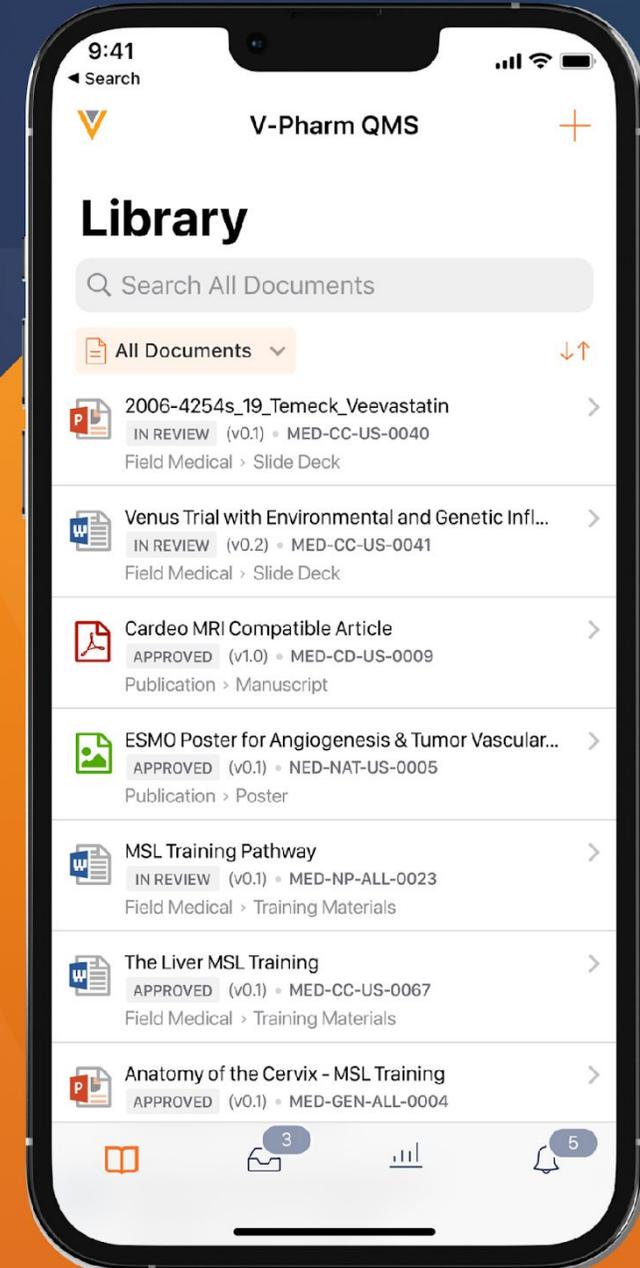
Updated as of the 25R1 Release





Now Available: **Vault Mobile App**

- Access all your Vaults on the go
- Browse and share content
- Complete tasks
- Scan and upload documents
- Create and reply to document comments
- Check dashboards
- Get push notifications





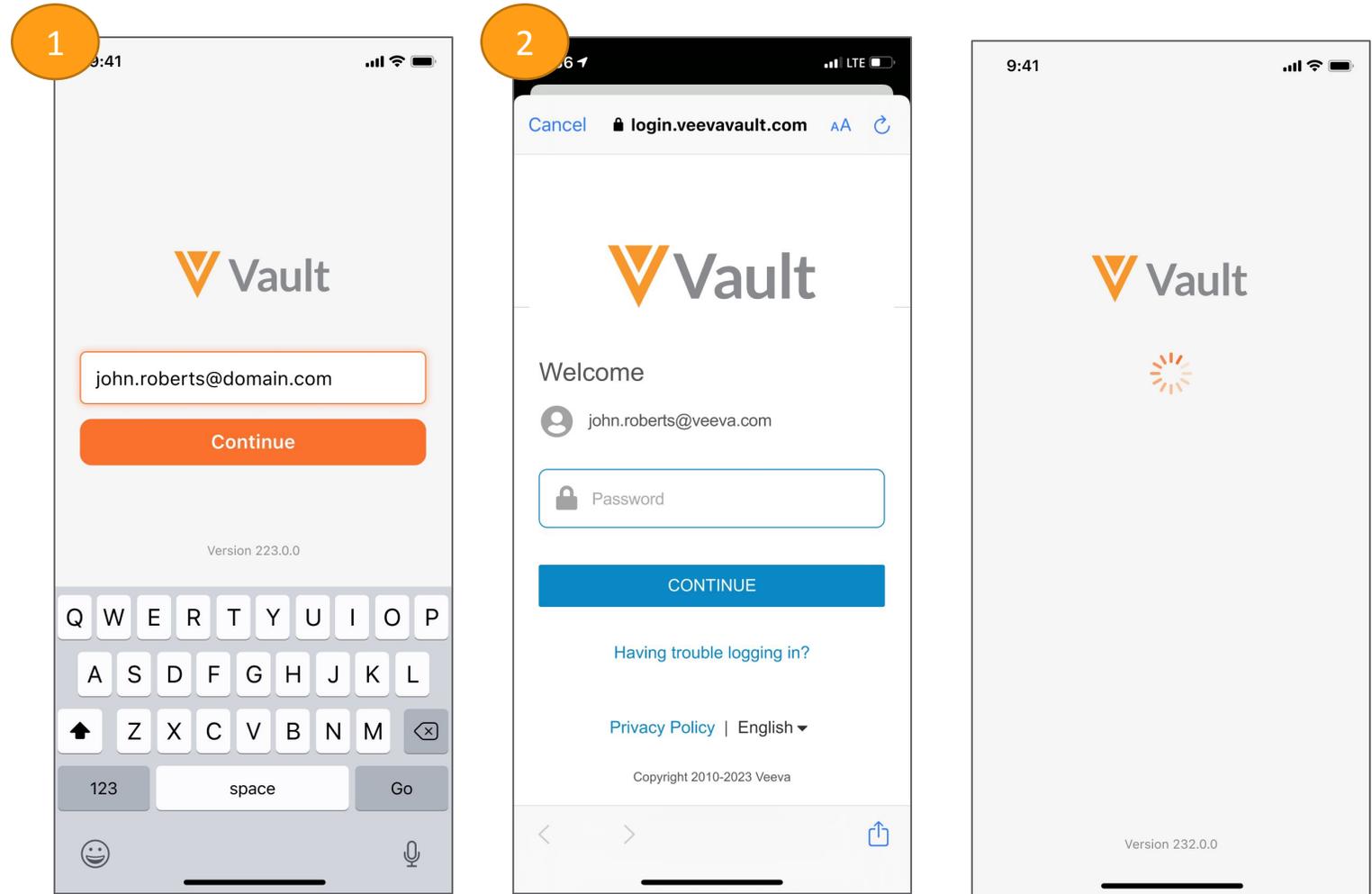
Logging In

Logging In

1. Enter username

2. In pop-up, enter password and tap Continue

- If using Single Sign-On, you will be routed to your Identity Provider to enter username and password

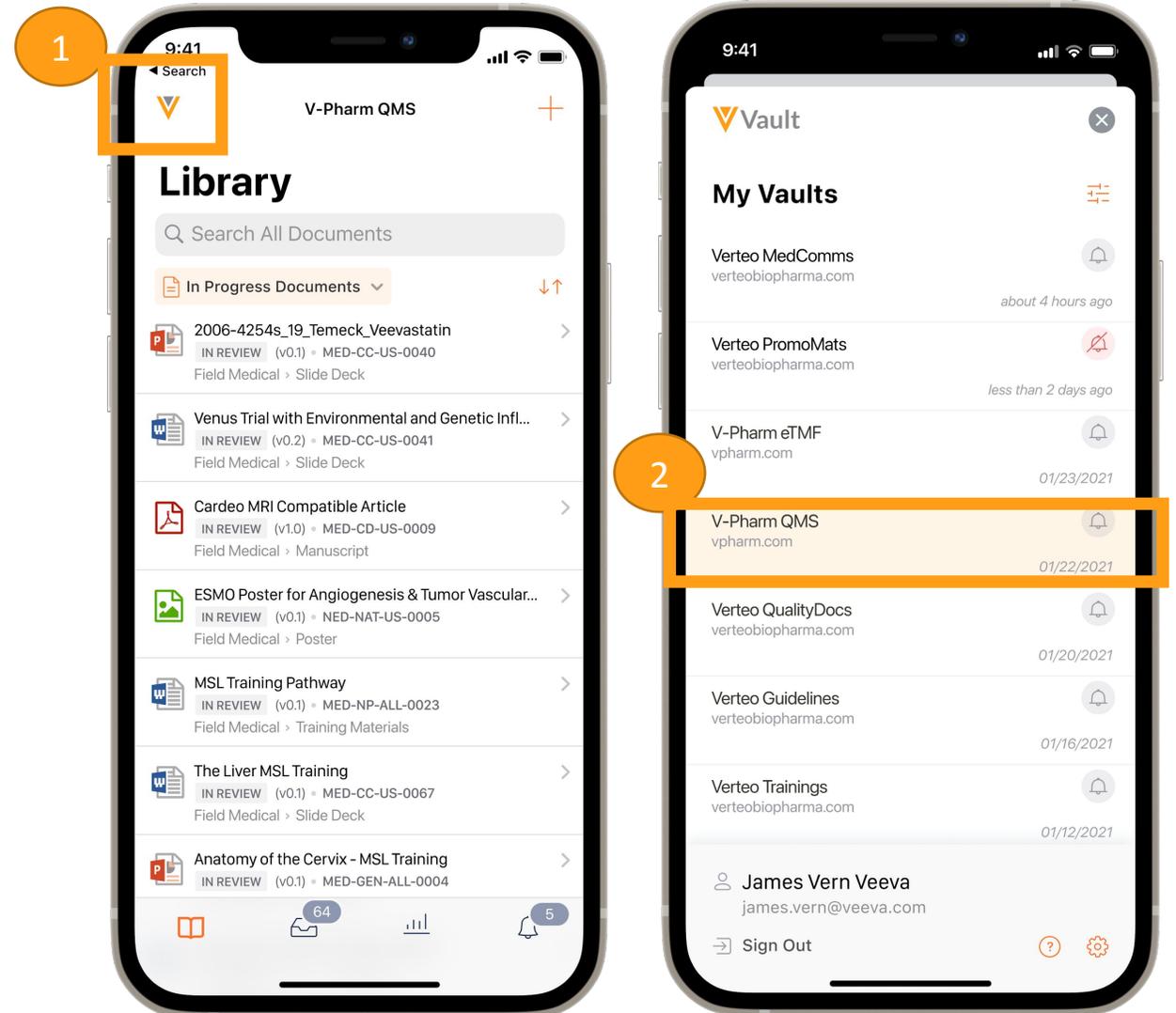




Navigation

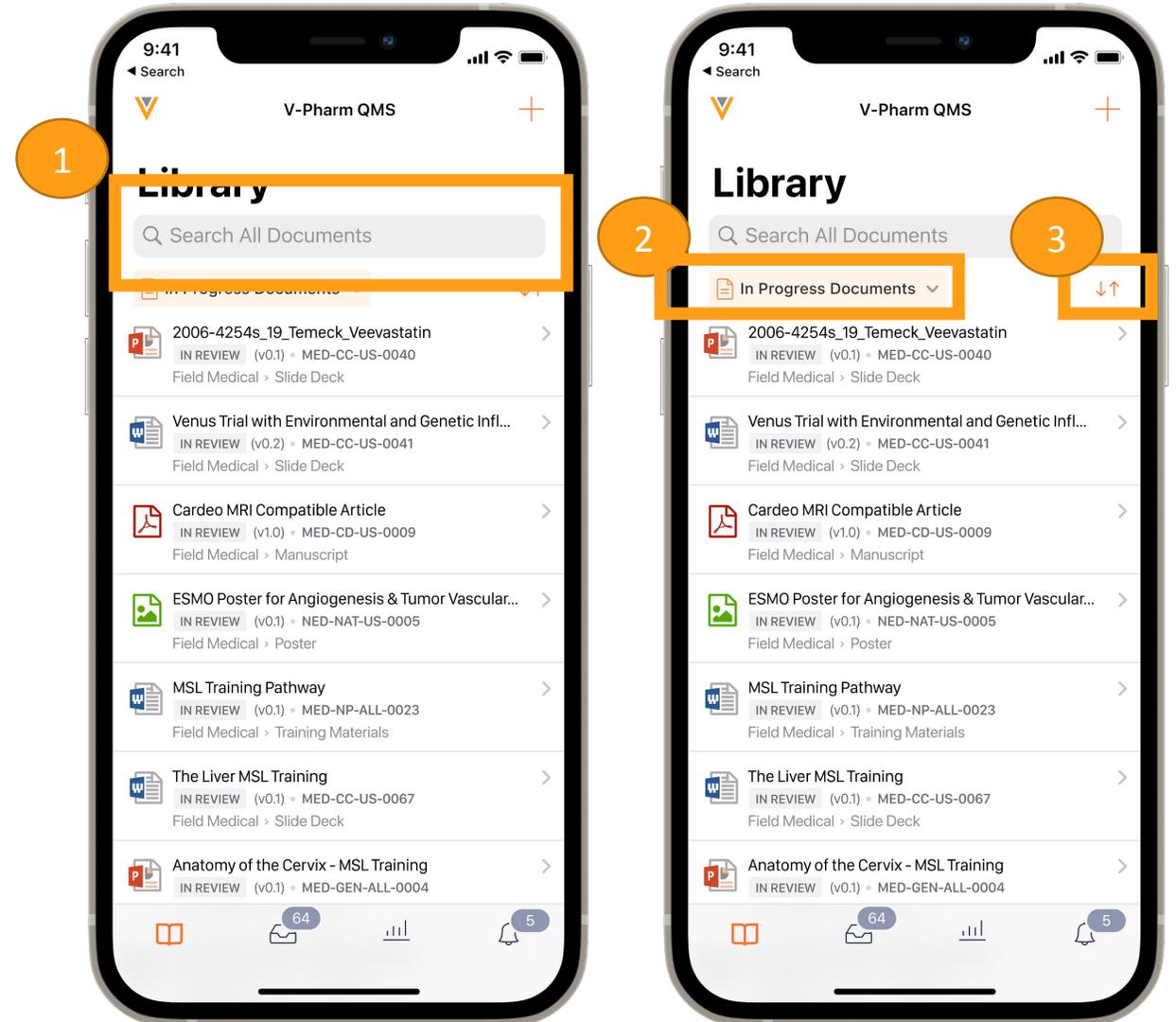
Accessing Vaults

1. Tap the Veeva logo in the upper-left
2. Tap on the Vault you want to access



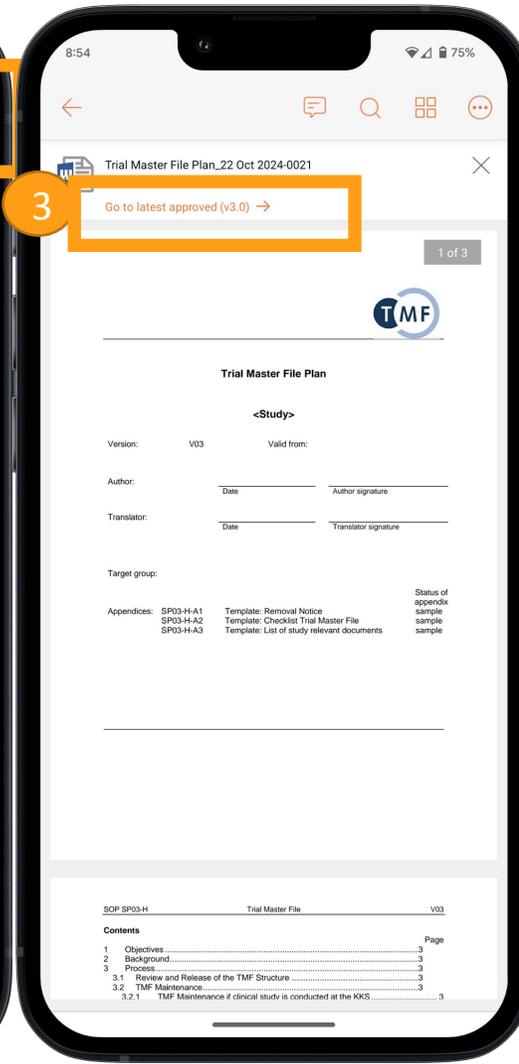
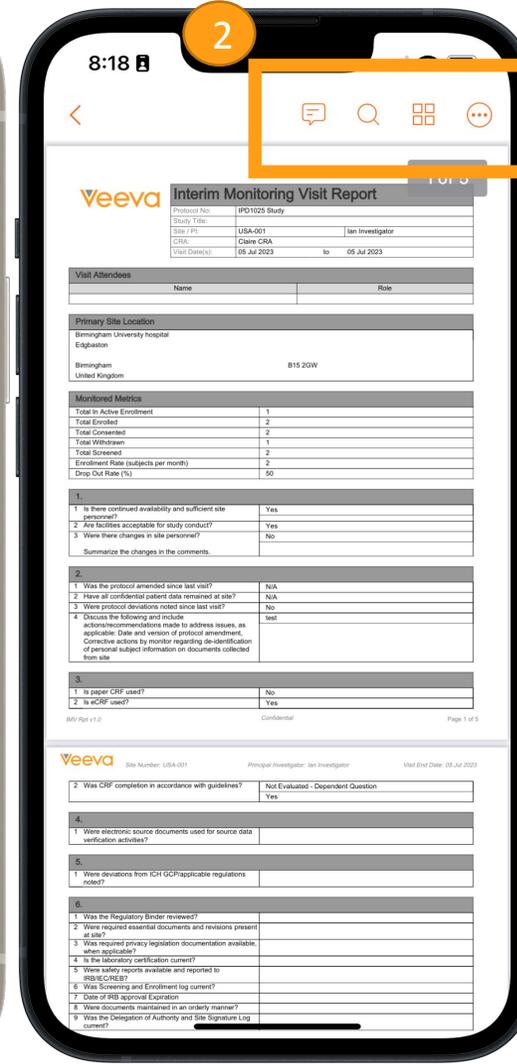
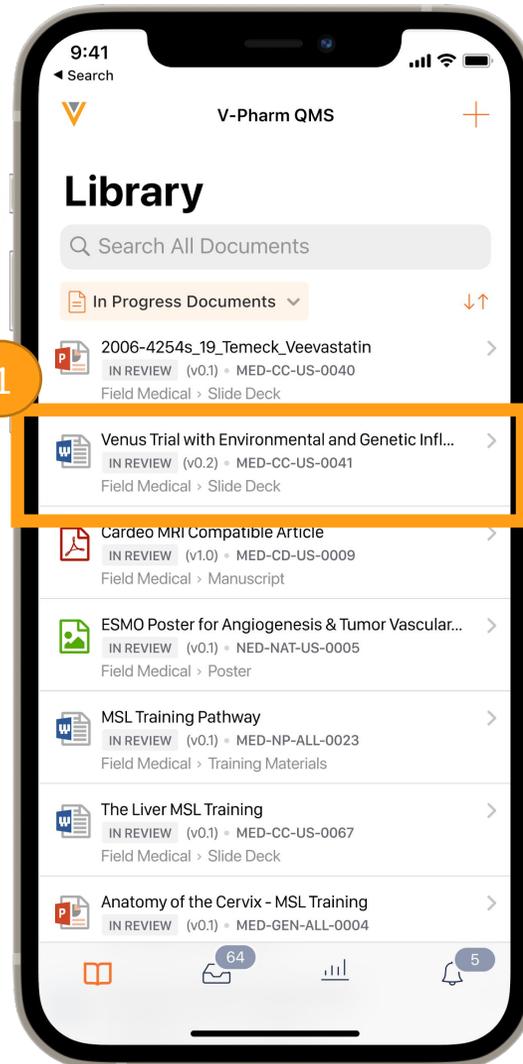
Navigating Documents

1. Type search terms in search bar
2. Tap the Views to choose from available views
3. Tap sort icon to change sorting of documents



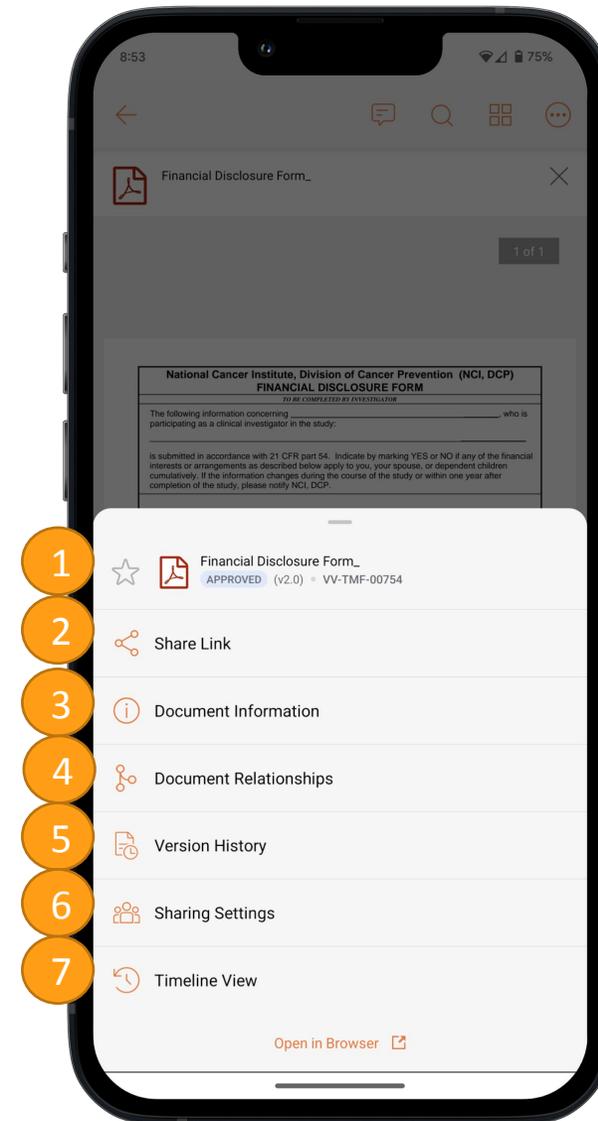
Viewing Documents

1. Tap on document
2. Available actions
 - View document comments
 - Search within document
 - View all pages
 - Action menu
- If not viewing the latest version, a link will display to the current version.
 - If viewing a minor version, and a steady state version exists, a link will display to the latest steady state version.



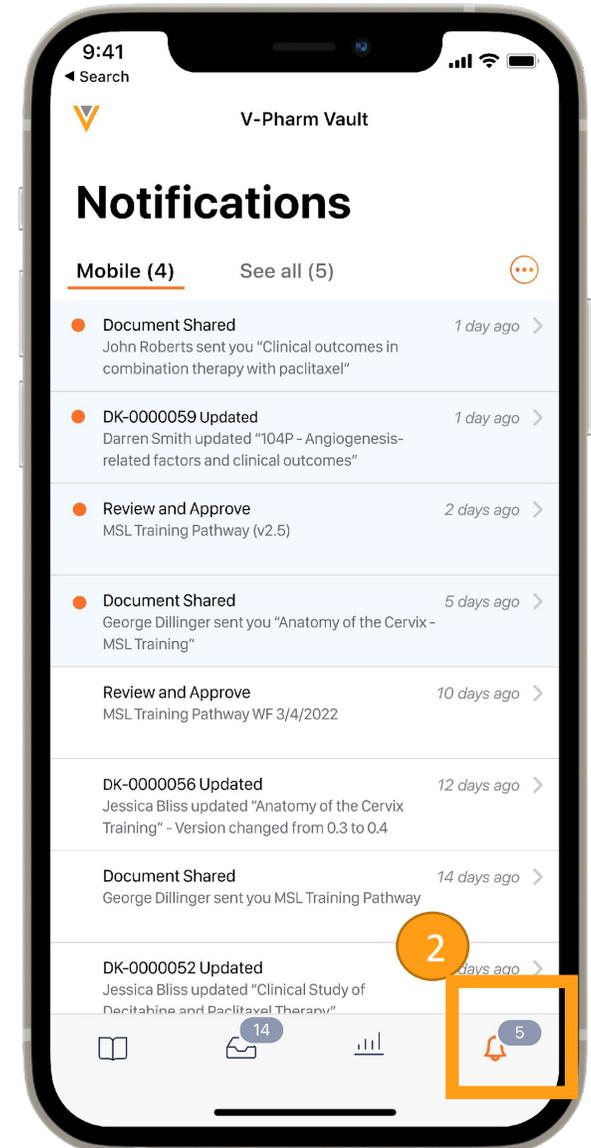
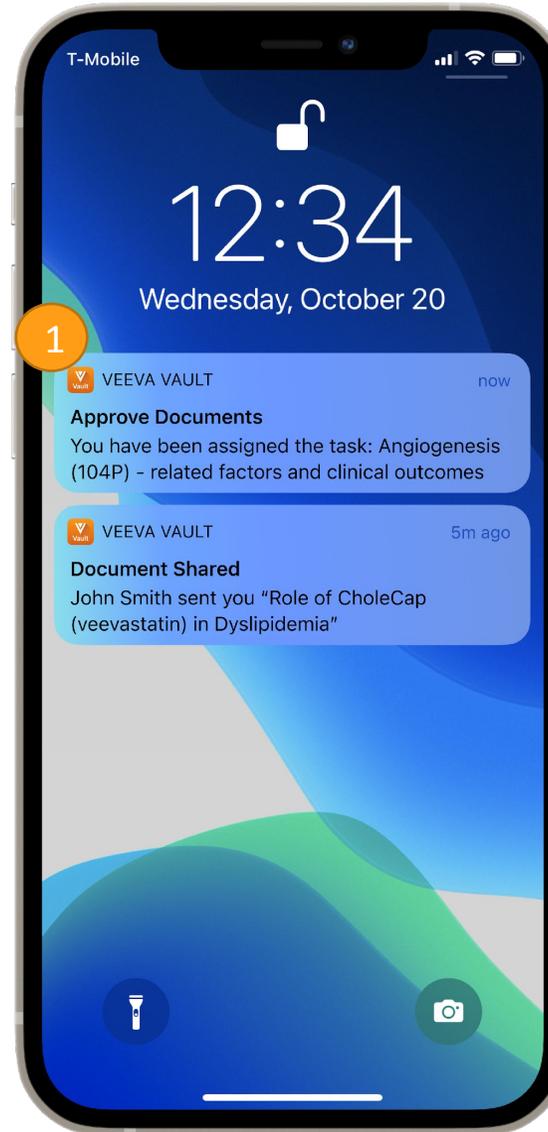
Document Action Menu

1. Tap the star icon to Favorite or un-Favorite the document
2. Tap **Share Link** to share a link to the document
 - Uses your device's existing share menu/options
3. Tap **Document Information** to view document metadata
4. Tap **Document Relationships** to view any existing relationships
 - i.e. Supporting Documents
5. Tap **Version History** to view history and prior versions
6. Tap **Sharing Settings** to view document Sharing Settings Users with permission may also add to Sharing Settings
7. Tap **Timeline View** to view workflow history



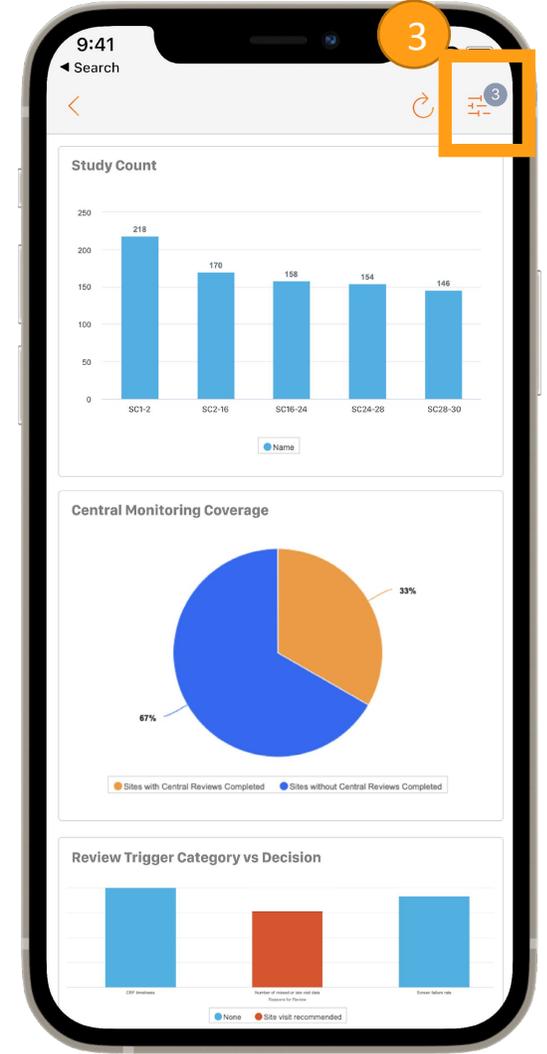
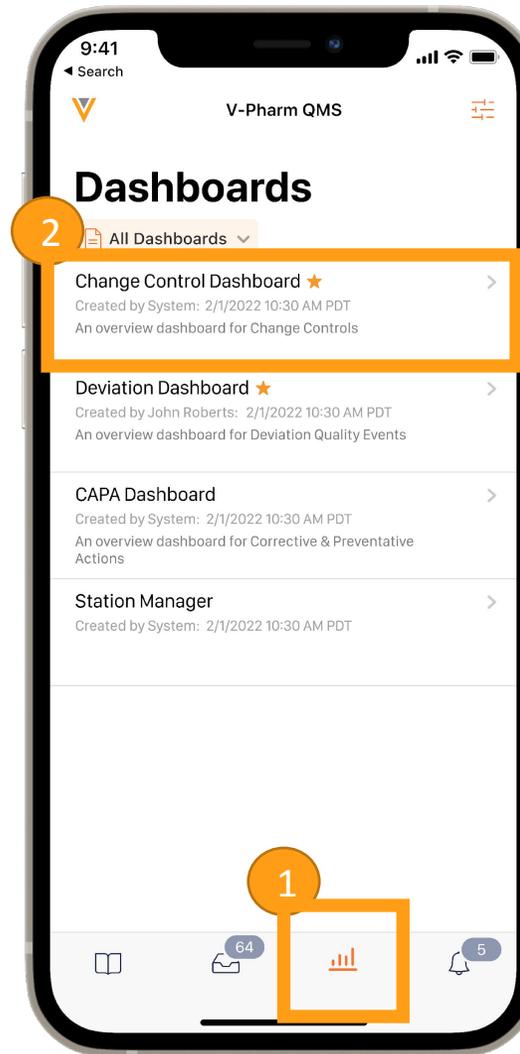
Viewing Notifications

1. Push notifications (based on device permissions/settings)
 - Includes:
 - Document Tasks
 - Documents Shared
 - Favorite Document Updates
2. To view all notifications, tap the Notifications tab in the app
 - **Mobile** section includes notifications above
 - **See all** section includes all notifications (not just those sent by Vault Mobile)



Viewing Dashboards

1. Tap the Dashboard tab
2. Tap the desired dashboard
3. If necessary, apply or adjust filters using the filter icon

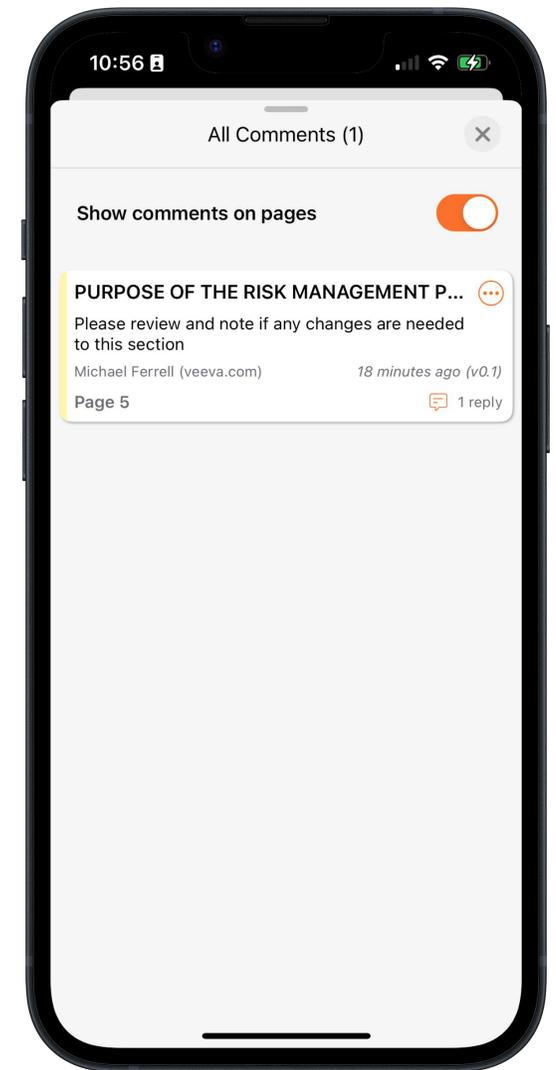
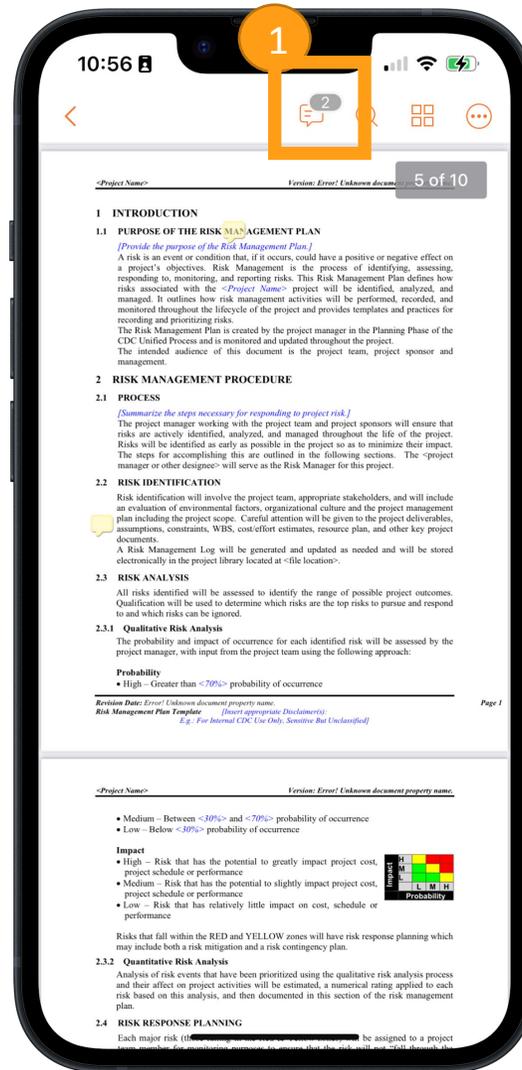




Document Comments

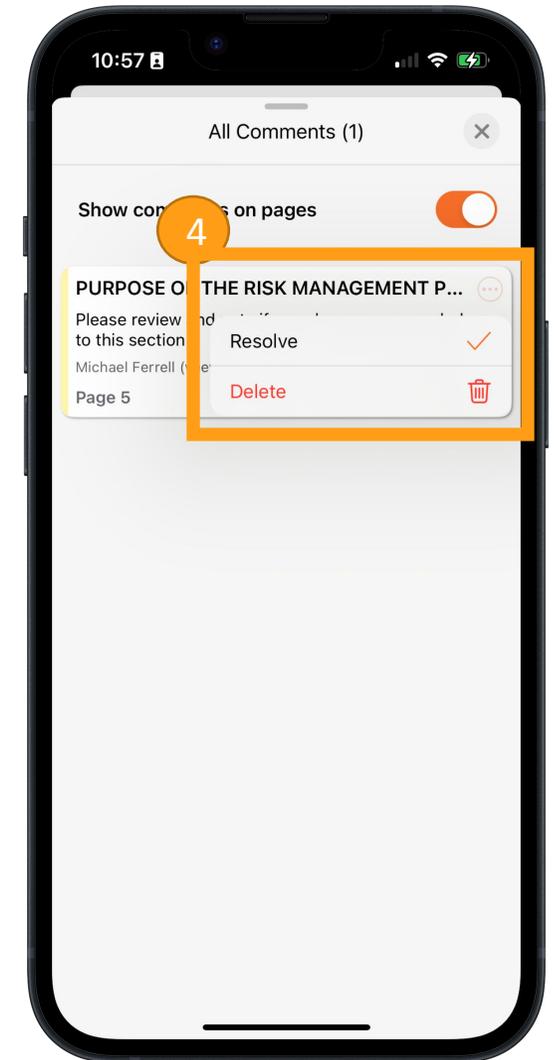
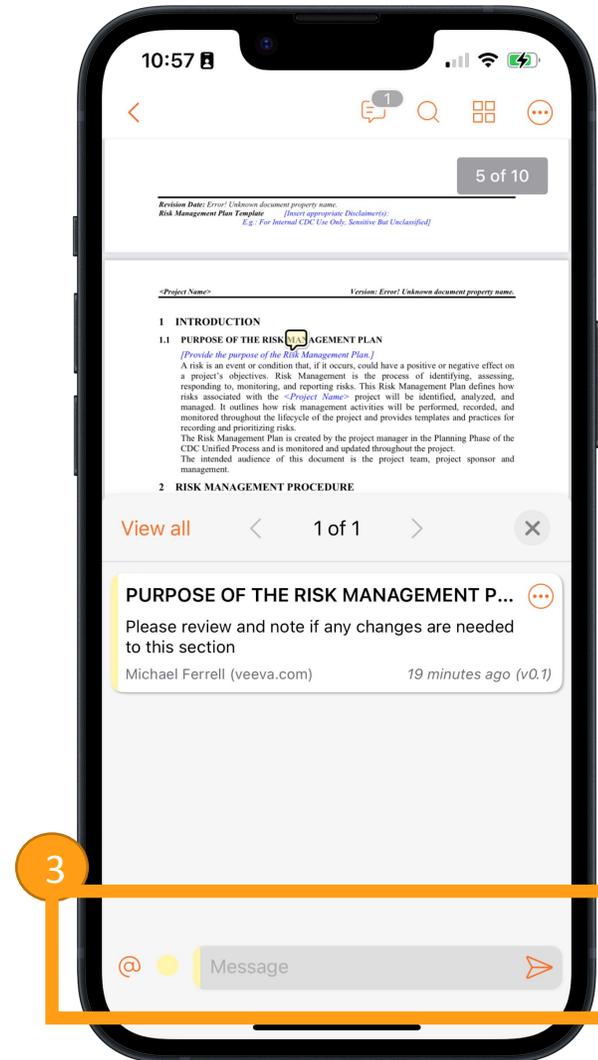
Viewing Comments

1. Tap the Comment icon in the upper-right when viewing a document



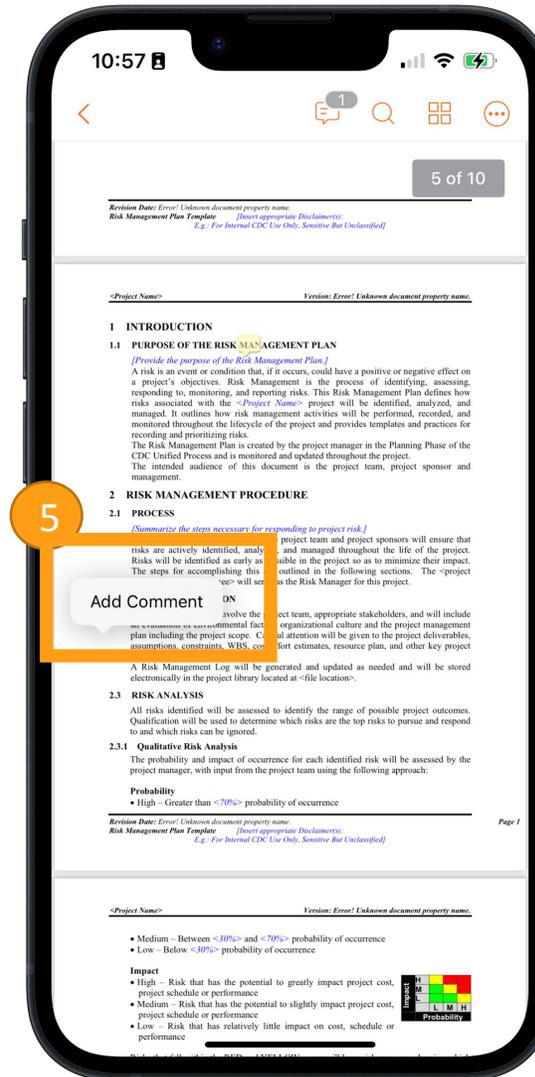
Replying To and Resolving Comments

3. Tapping an existing comment will open up the details and the ability to reply
4. The Action menu on a comment can be used to Resolve, Reopen, or Delete



Adding New Comments

5. New comments can be created by long-pressing anywhere in the document

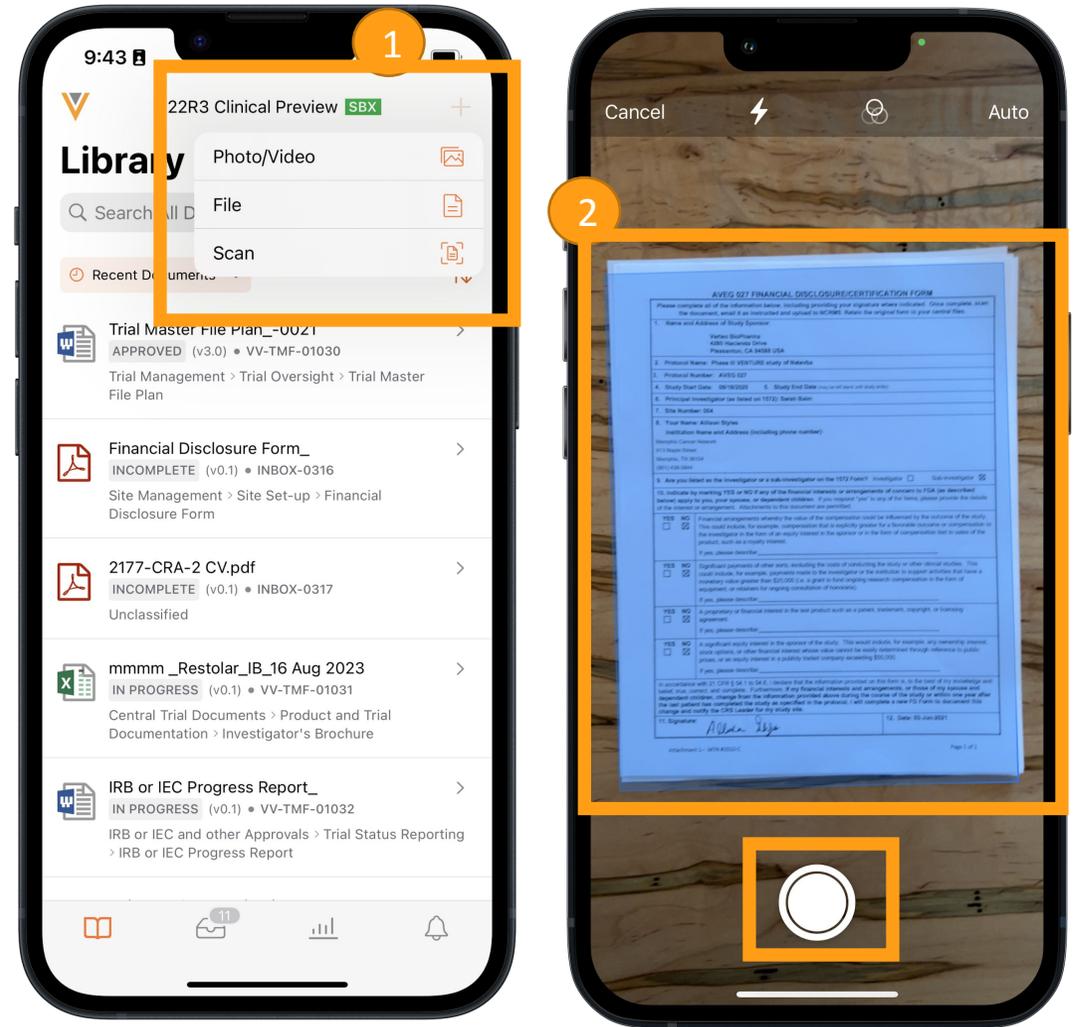




Creating Documents

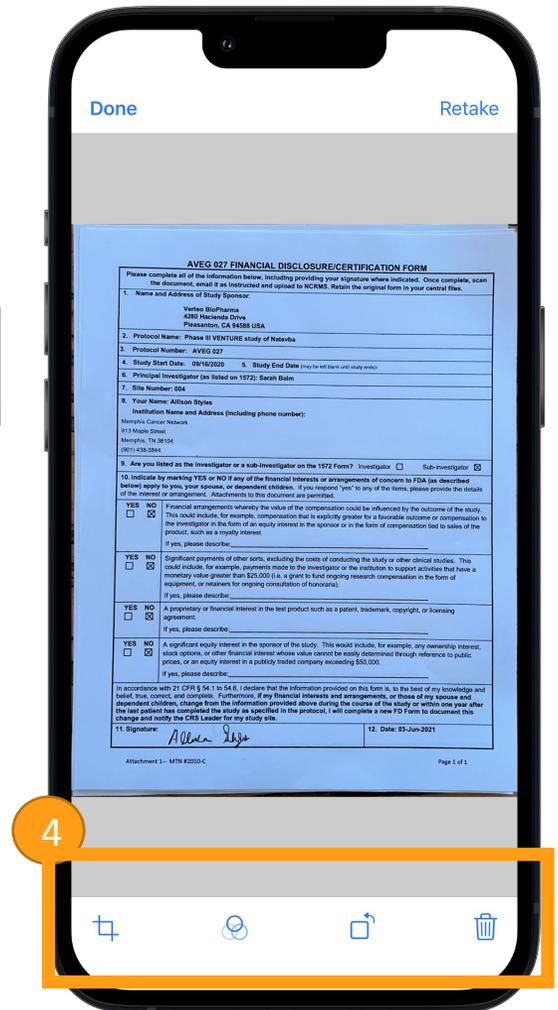
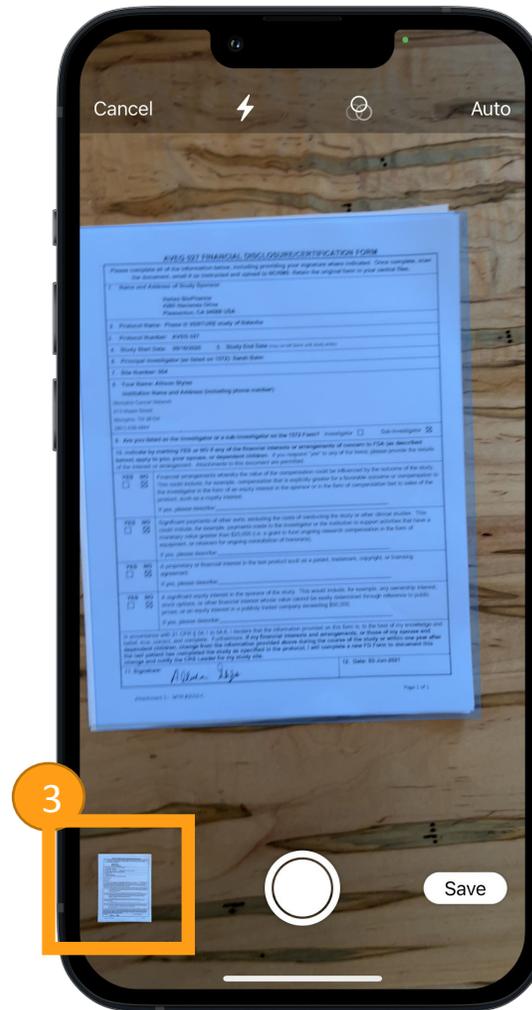
Scanning Documents

1. Tap the + icon in the upper-right of the Library tab and choose **Scan**
 - The icon will only be available to users with permission to create Unclassified documents
2. Position your device over the document to scan
 - Vault Mobile will automatically detect the edges, and once it does, it will capture the image
 - You can also use the button on the bottom to capture the image manually



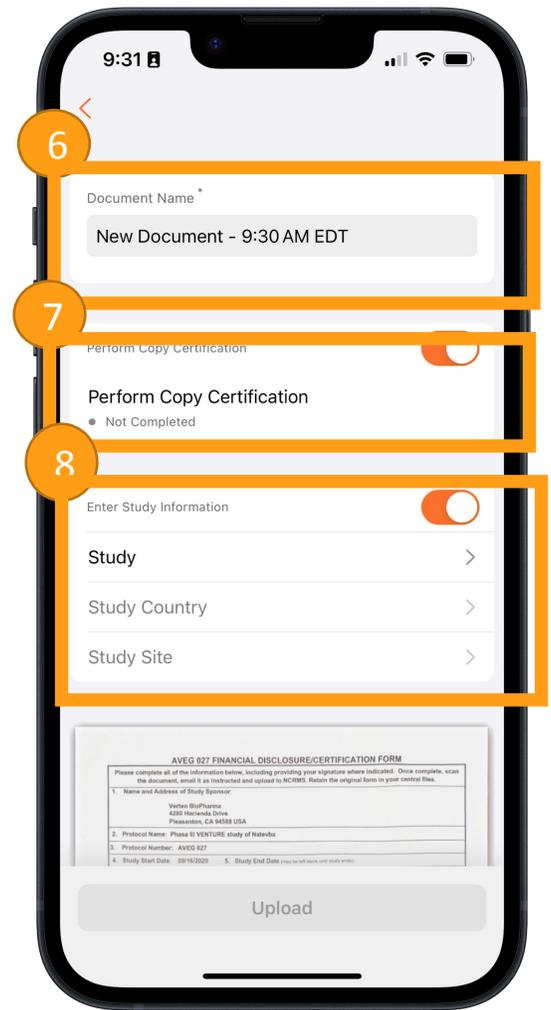
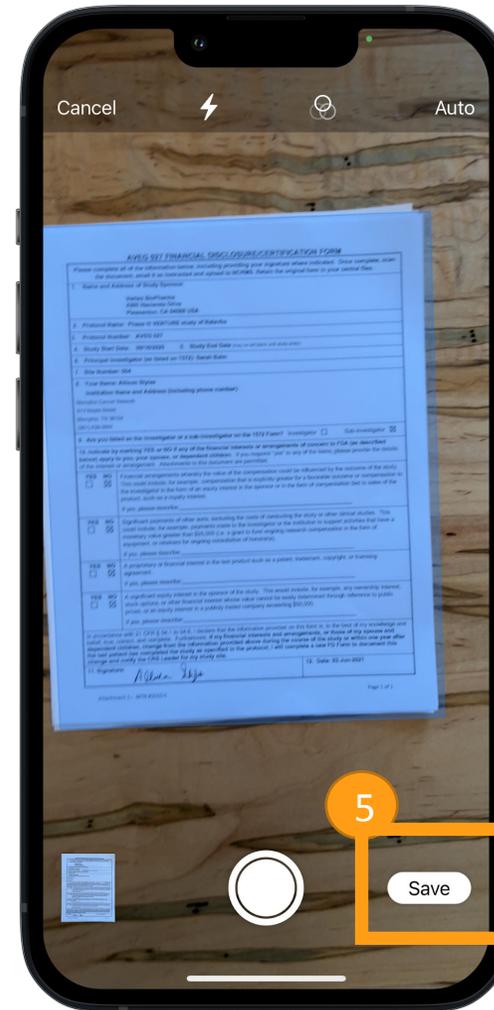
Editing Scans (Optional)

3. Tap the thumbnail in the bottom left
4. Use the bottom buttons to adjust:
 - Cropping
 - Coloration
 - Orientation
 - Delete page



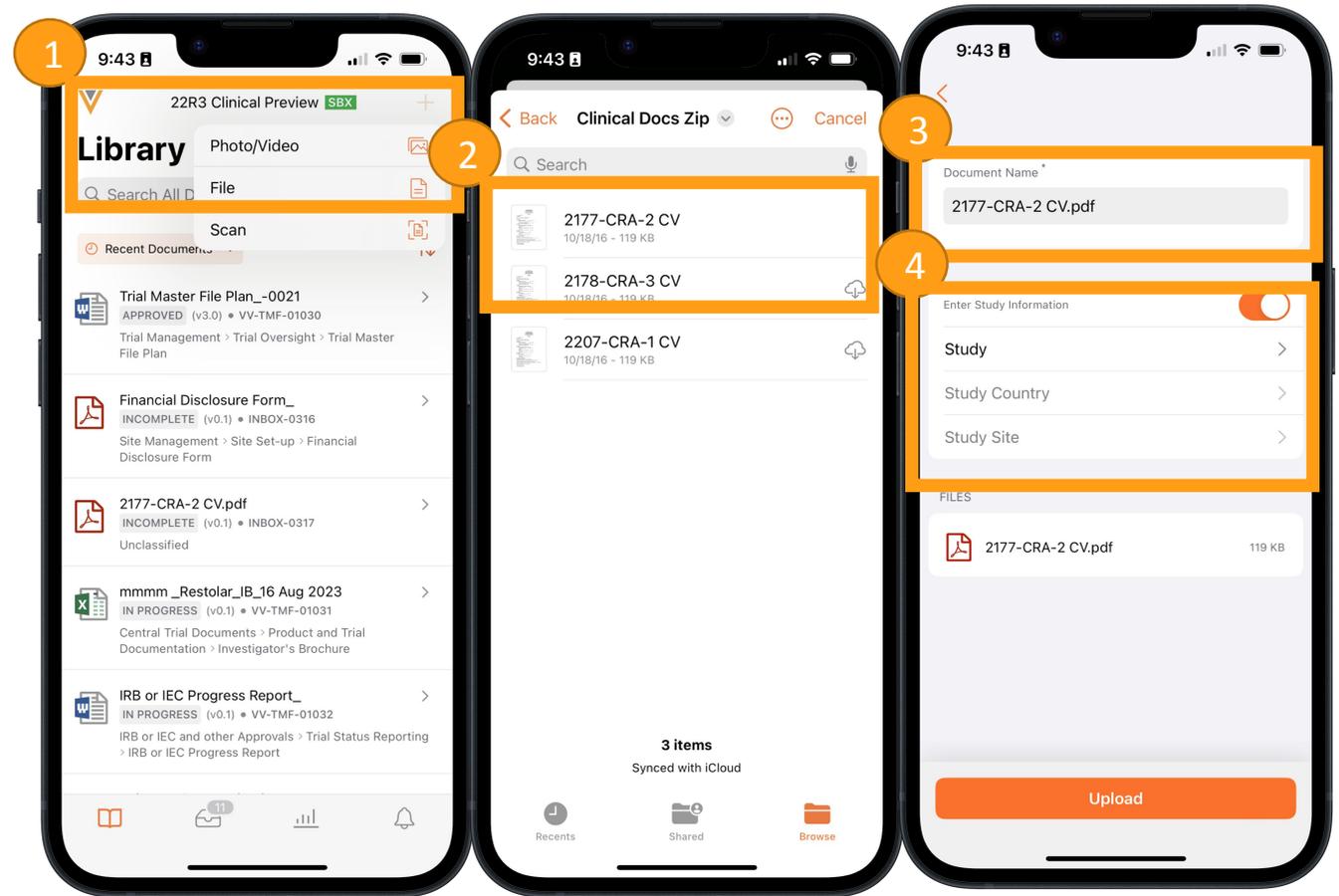
Scanning Documents

5. Once all pages are scanned, tap **Save**
6. Edit the Document Name as needed
7. Enable Copy Certification (Clinical Vaults only)
8. Apply Study, Study Country, or Study Site metadata (Clinical Vaults only)



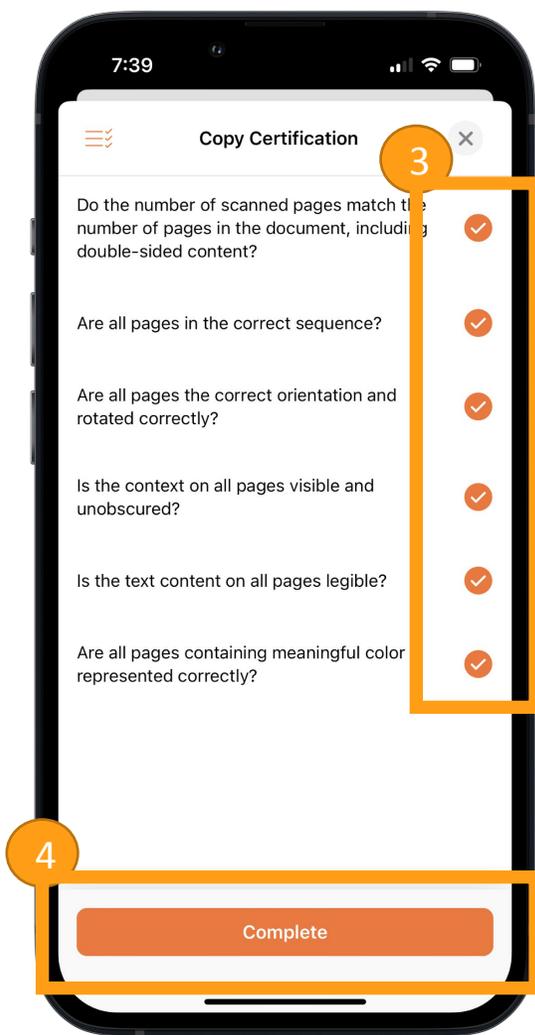
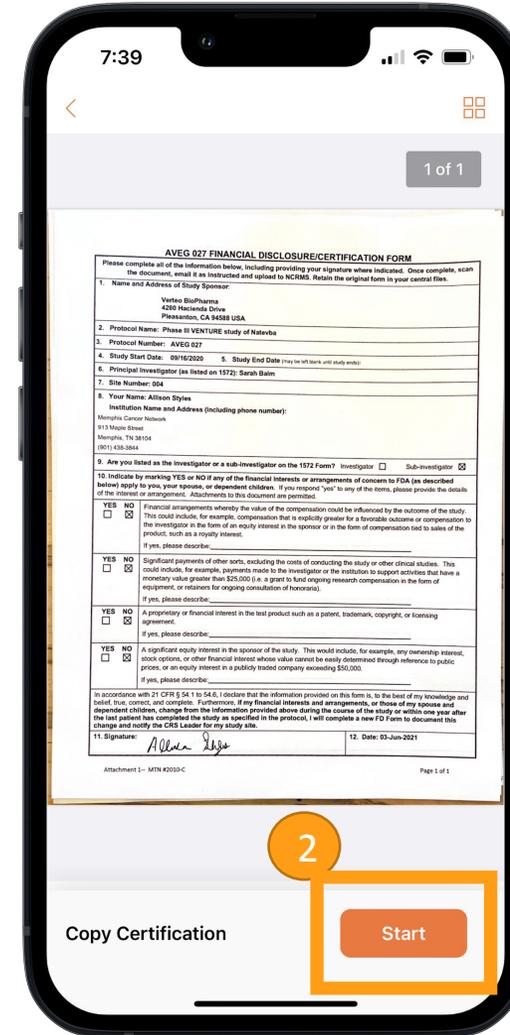
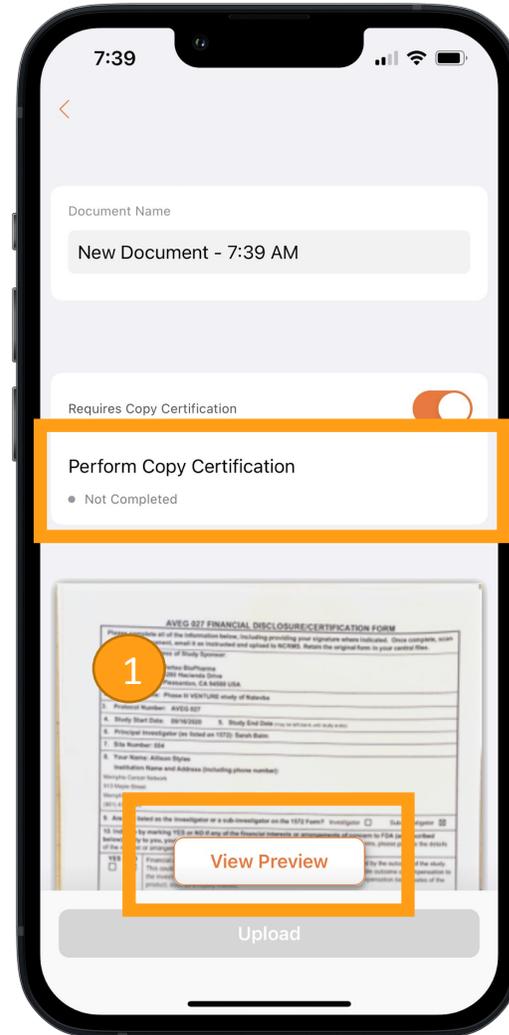
Uploading Files from the Device

1. Tap the + icon in the upper-right of the Library tab and choose **File** or **Photo/Video**
 1. Photo/Video is not available on Android
2. Navigate to the file you want to upload on your local device and tap the file
3. Edit the Document Name as needed
4. Apply Study, Study Country, or Study metadata (Clinical Vaults only)



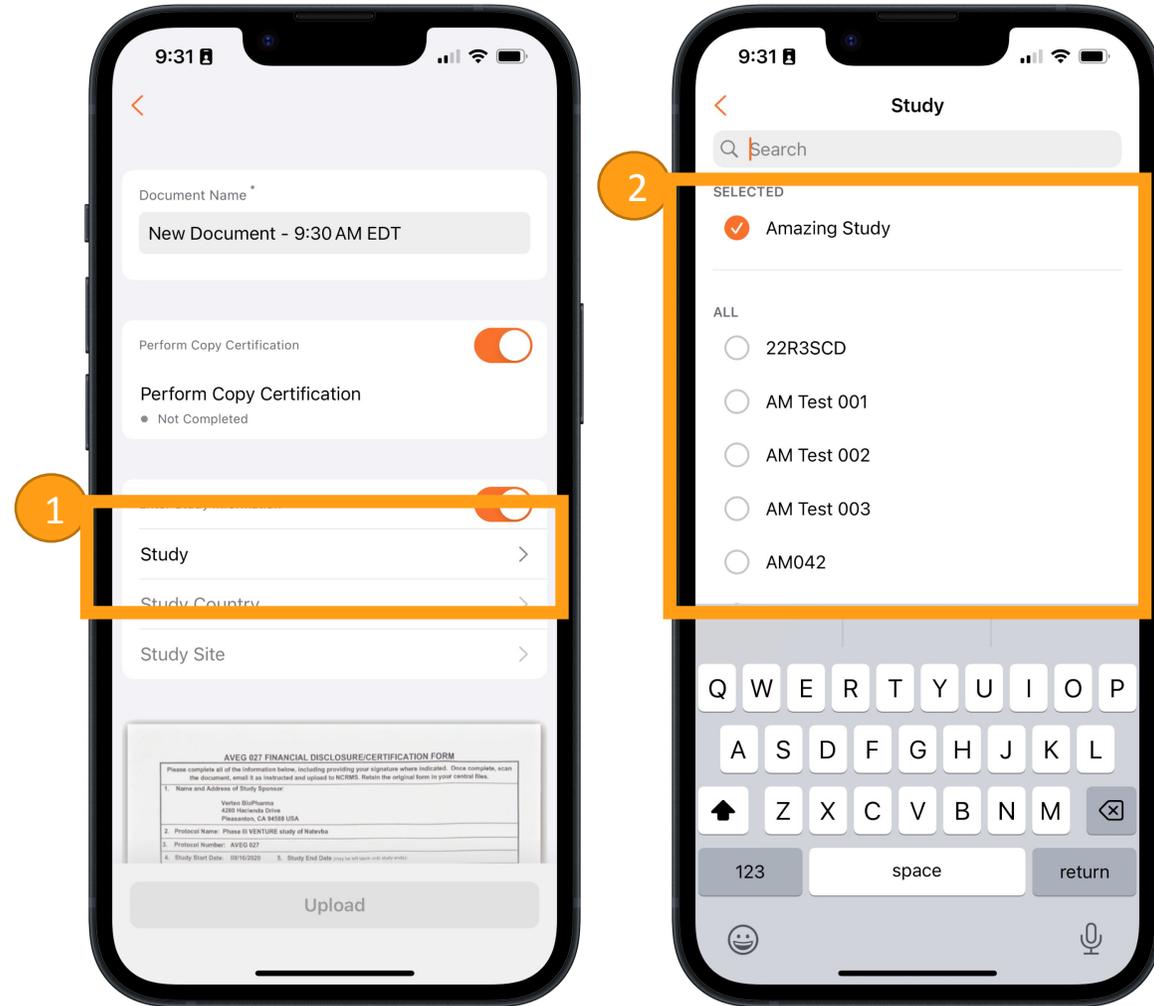
Copy Certification (Clinical Only)

1. Tap View Preview or Perform Copy Certification
2. Tap Start
3. Check off the Copy Certification boxes
4. Tap Complete



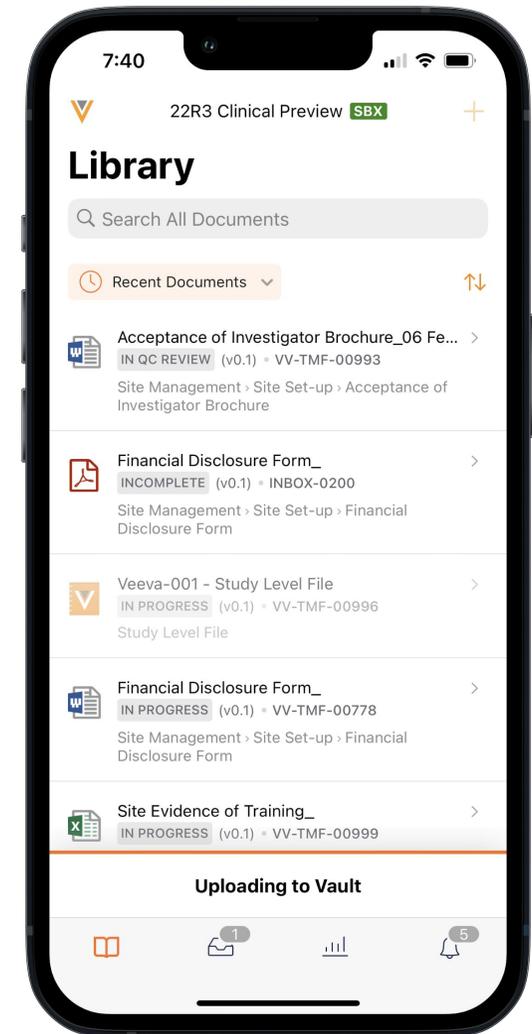
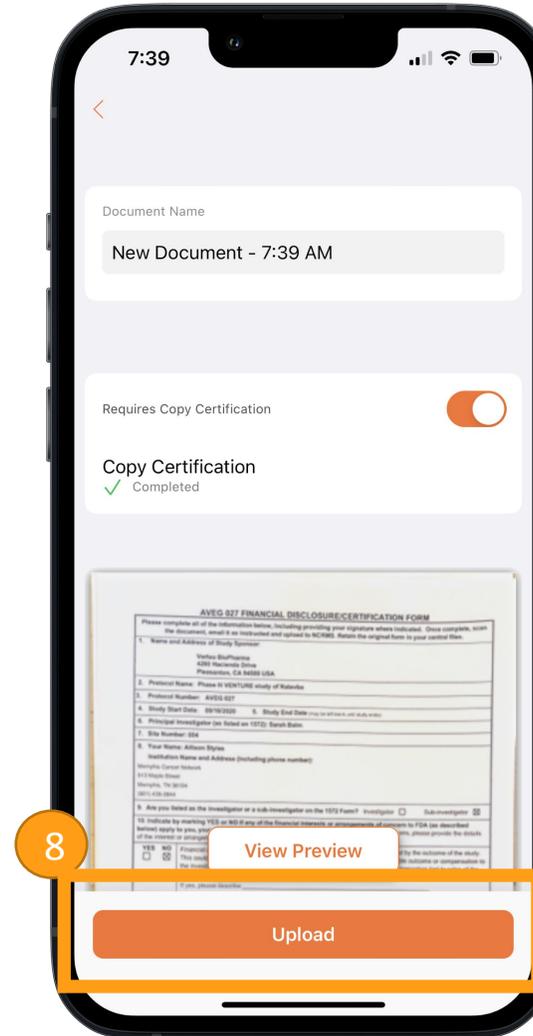
Applying Study Information (Clinical Only)

1. Tap **Study** to see available Studies
2. Tap the appropriate Study (or multiple Studies)
3. Repeat for **Study Country** and **Study Site** to (if applicable)



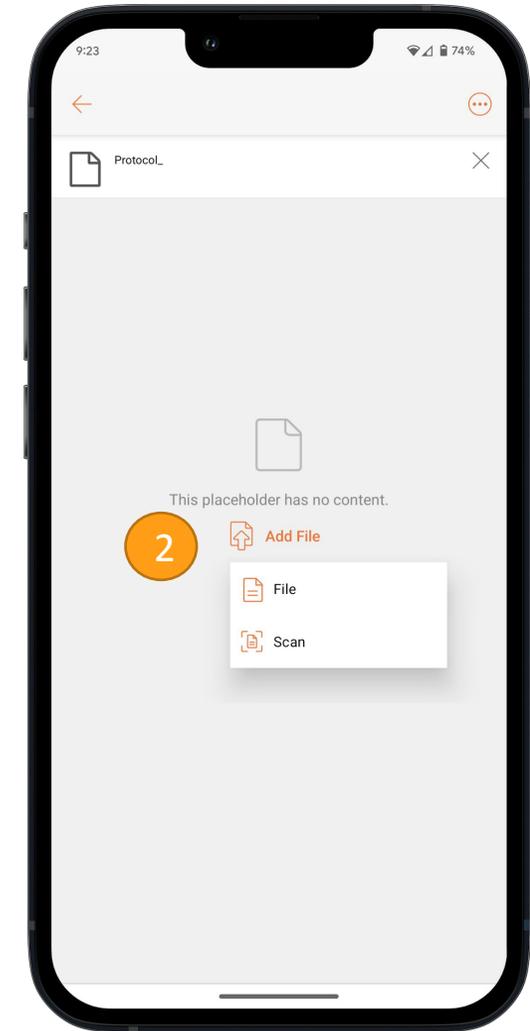
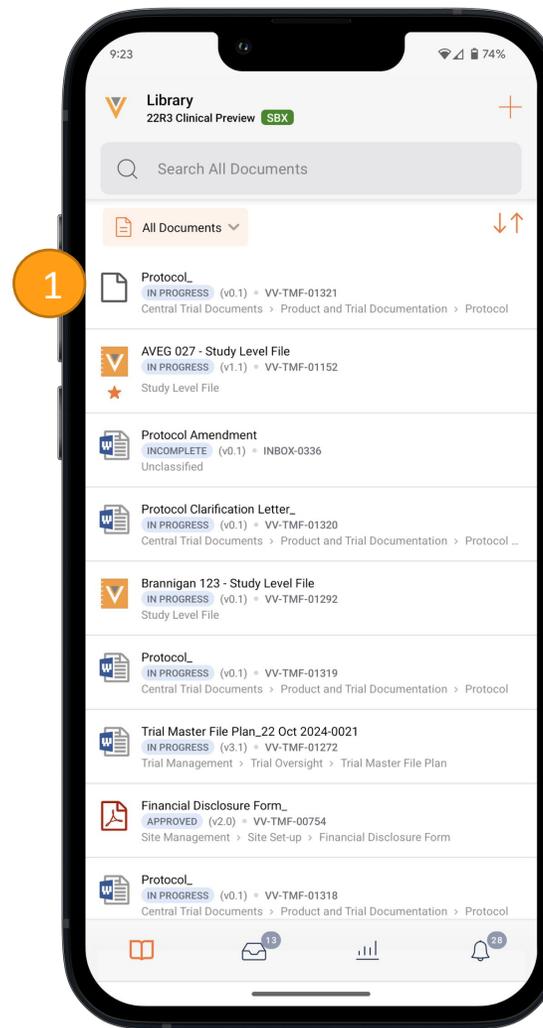
Finalize Upload

8. Once Document Name and Copy Certification is performed (if applicable), tap **Upload**
- This will create the document as Unclassified in the Document Inbox – the classification will need to occur separately via the web



Uploading to a Placeholder

1. Tap on a placeholder from the Library tab
2. Tap **Add File** and choose an upload method

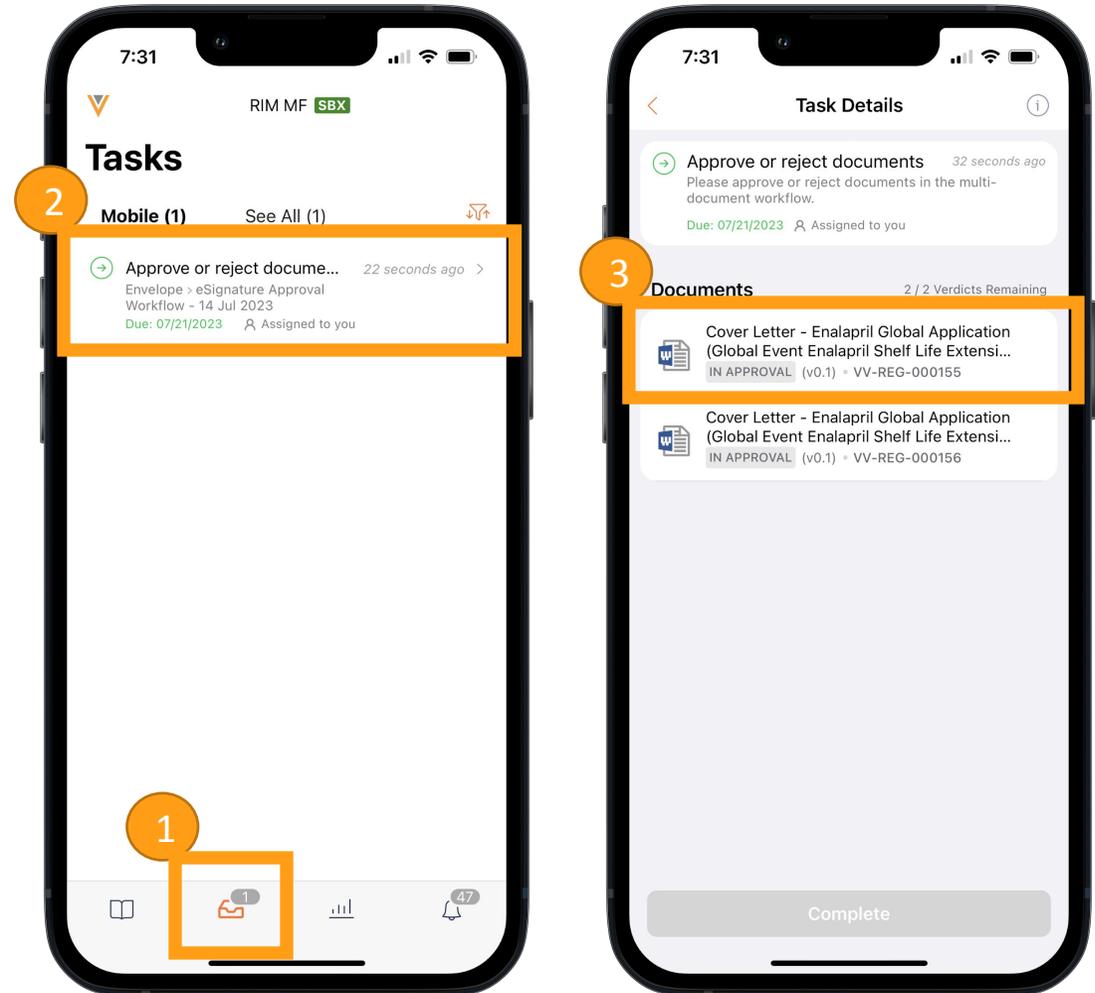




Completing Workflows

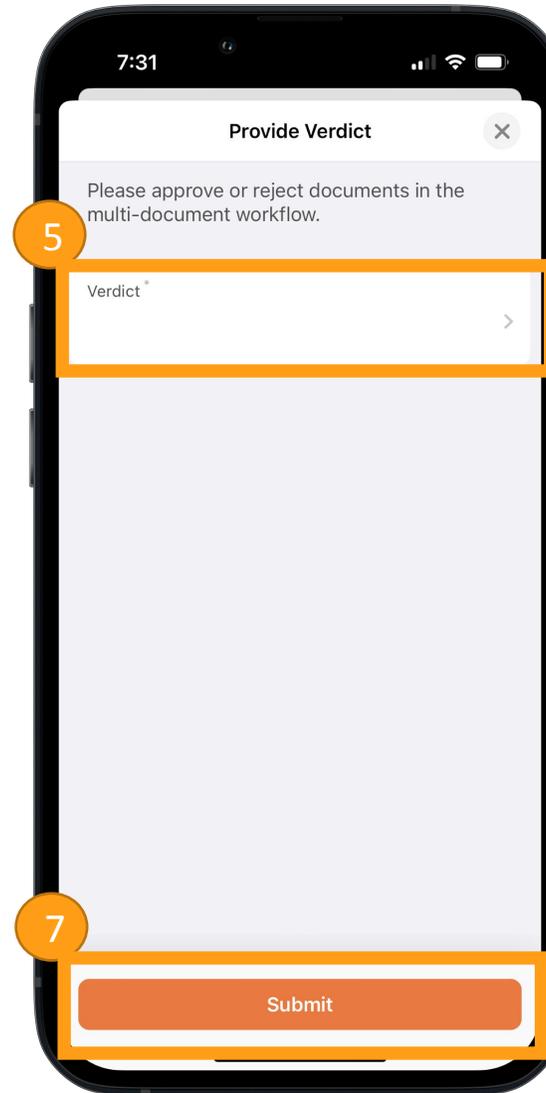
Completing Workflow Tasks

1. Tap the **Tasks** tab in the app
 - **Mobile** section includes tasks that can be completed in Vault Mobile
 - **See all** section includes additional tasks that can only be completed in a browser
2. Tap on a task
3. Tap on document to review



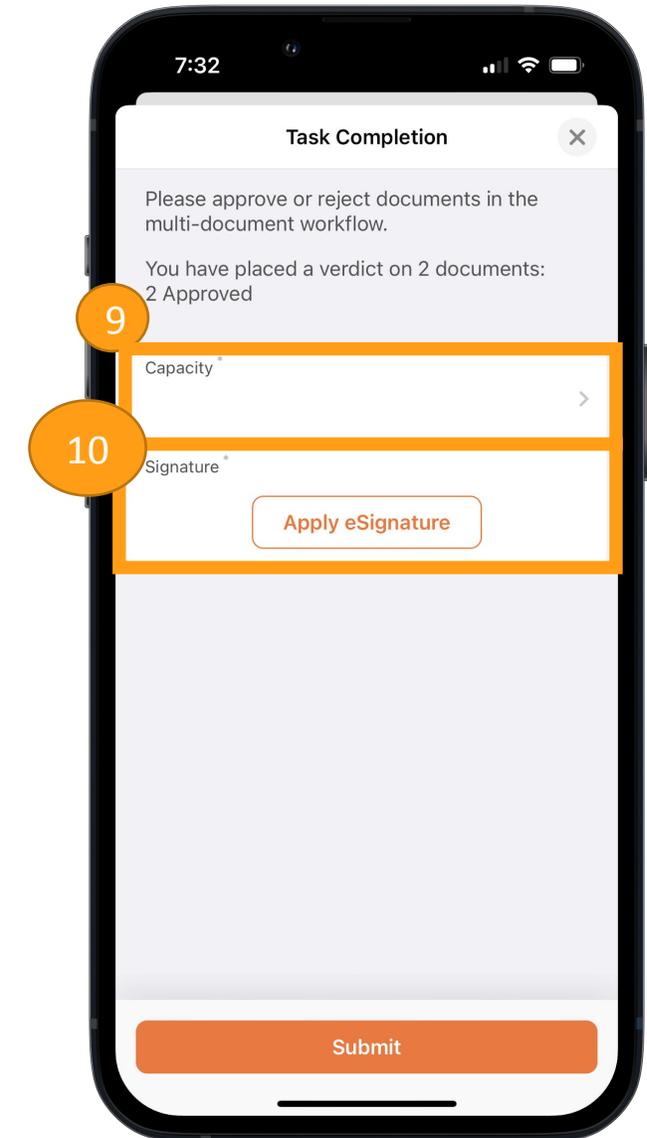
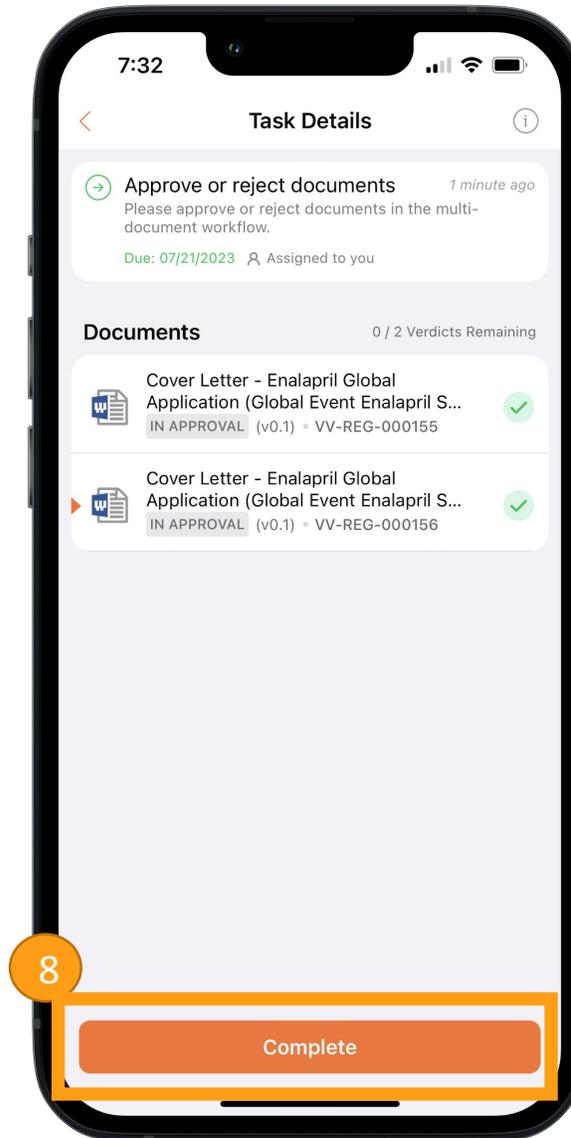
Completing Workflow Tasks

4. Tap **Complete**
5. Tap **Verdict** box
6. Choose a verdict
7. Tap **Submit**



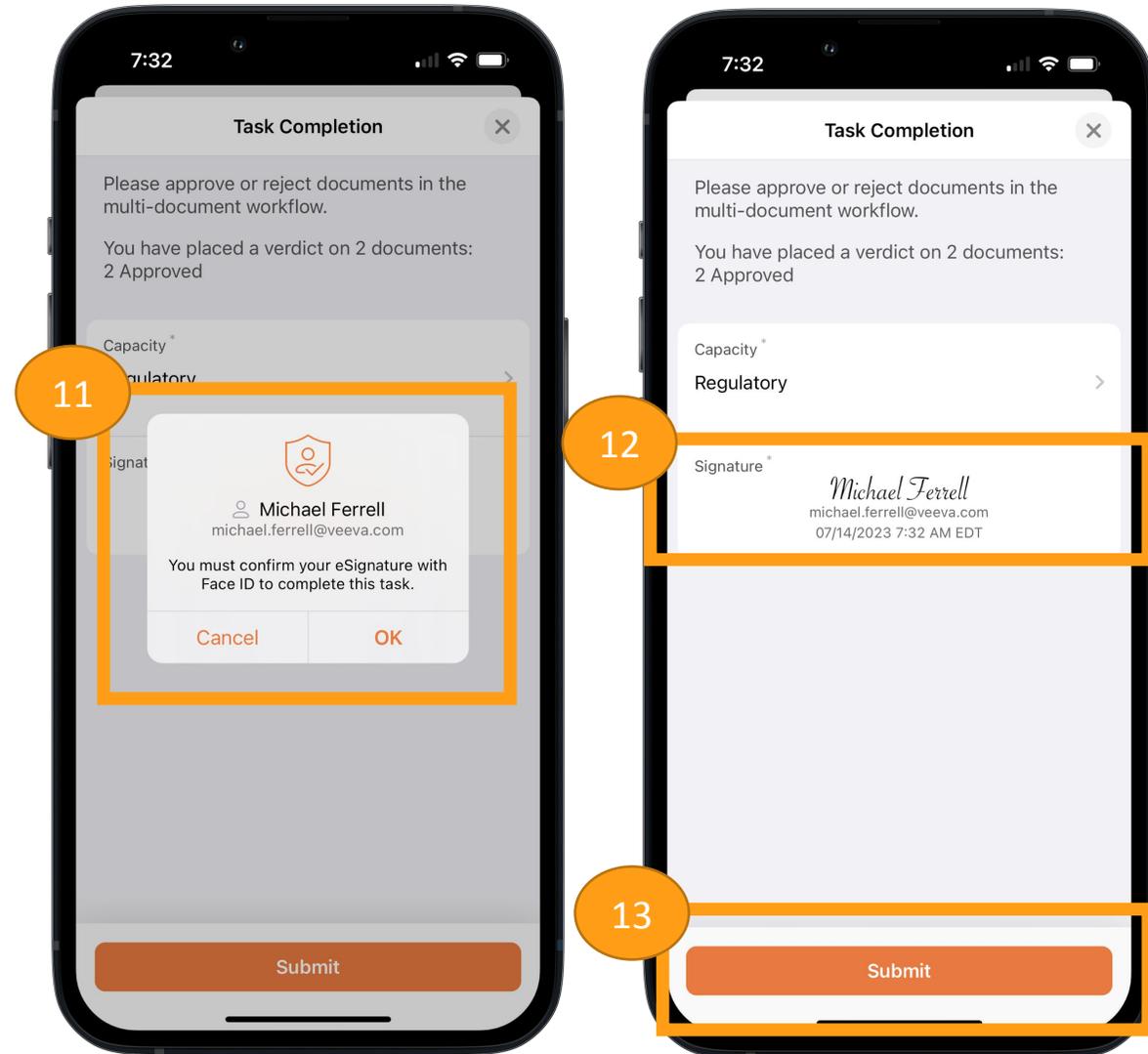
Completing Workflow Tasks

8. Once a verdict is applied to all documents, tap **Complete**
9. If the workflow requires eSignature, tap **Capacity** on the summary screen
10. Tap Apply eSignature



Completing Workflow Tasks

11. If this is the first time applying eSignature in this Vault via Vault Mobile, you will be prompted to allow the use of biometrics for authenticating. Tap **OK** to allow.
12. Once biometrics are confirmed, eSignature is applied
13. Tap **Submit**



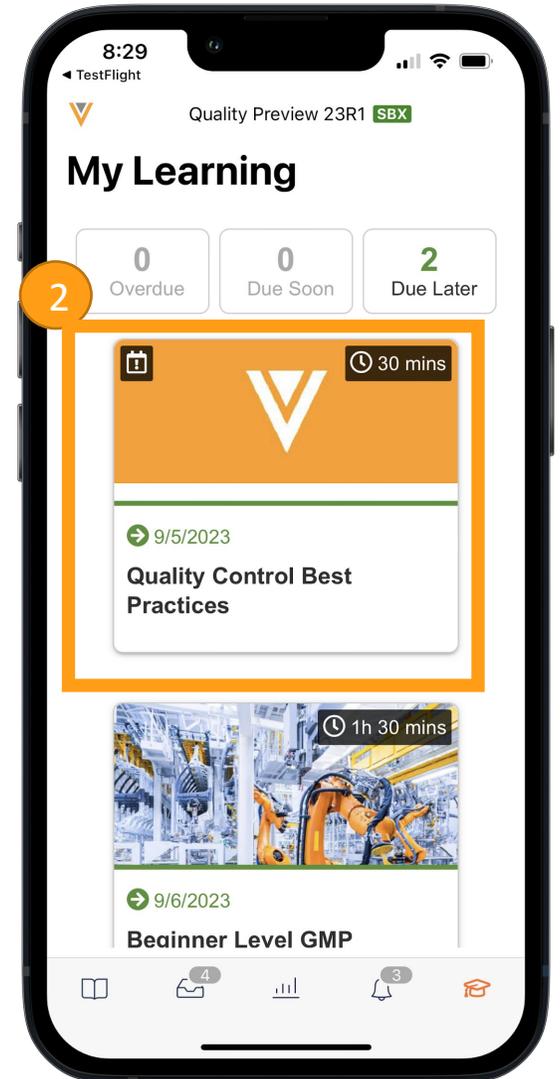
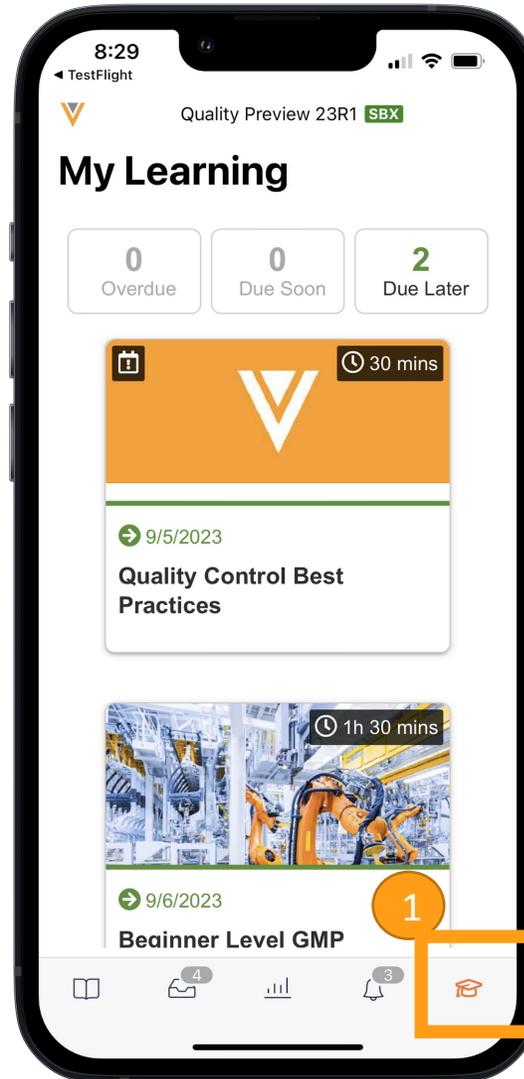


Completing Training

Vault Training Only

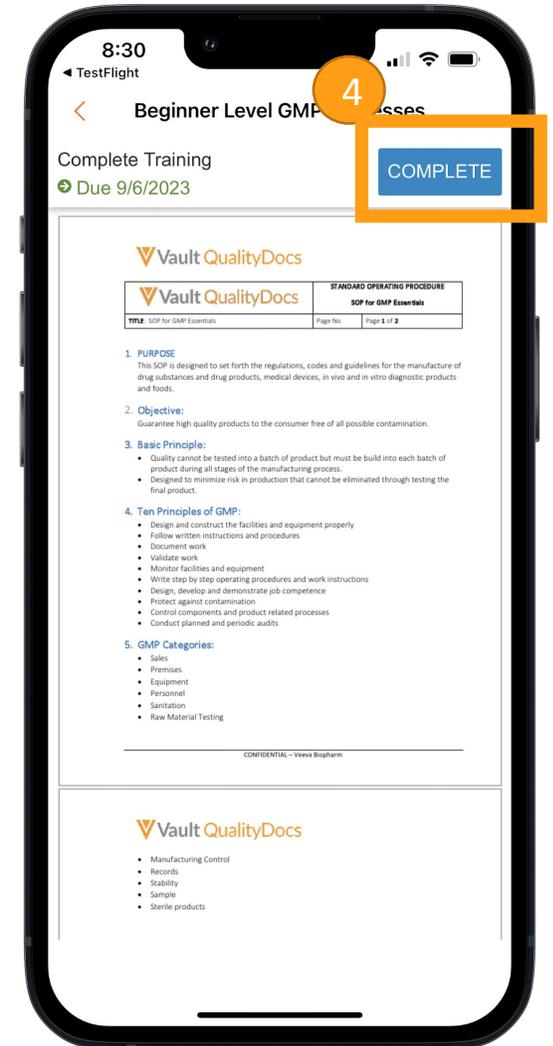
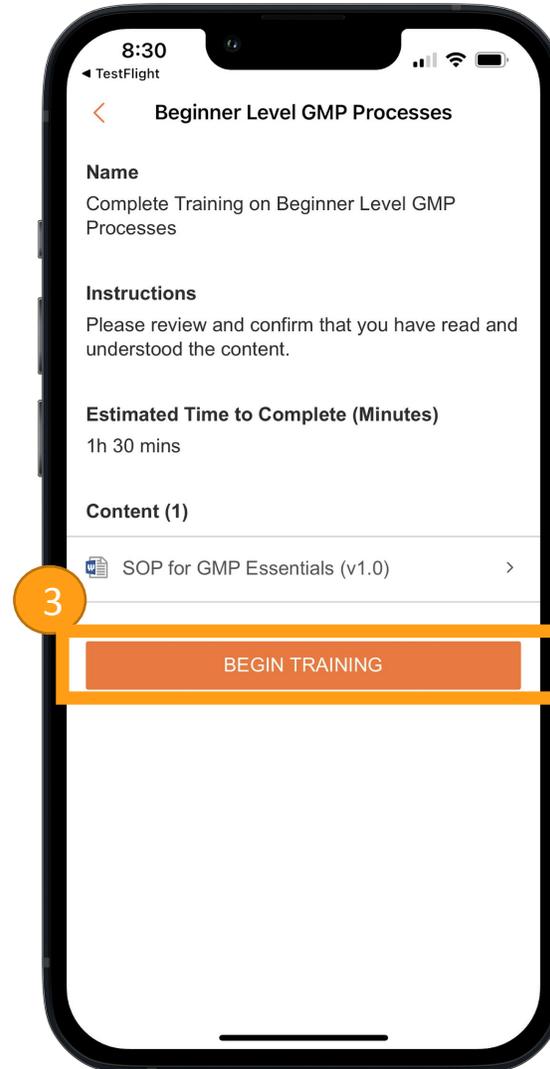
Completing Trainings

1. Tap the **My Learning** tab in the app
2. Tap on a task



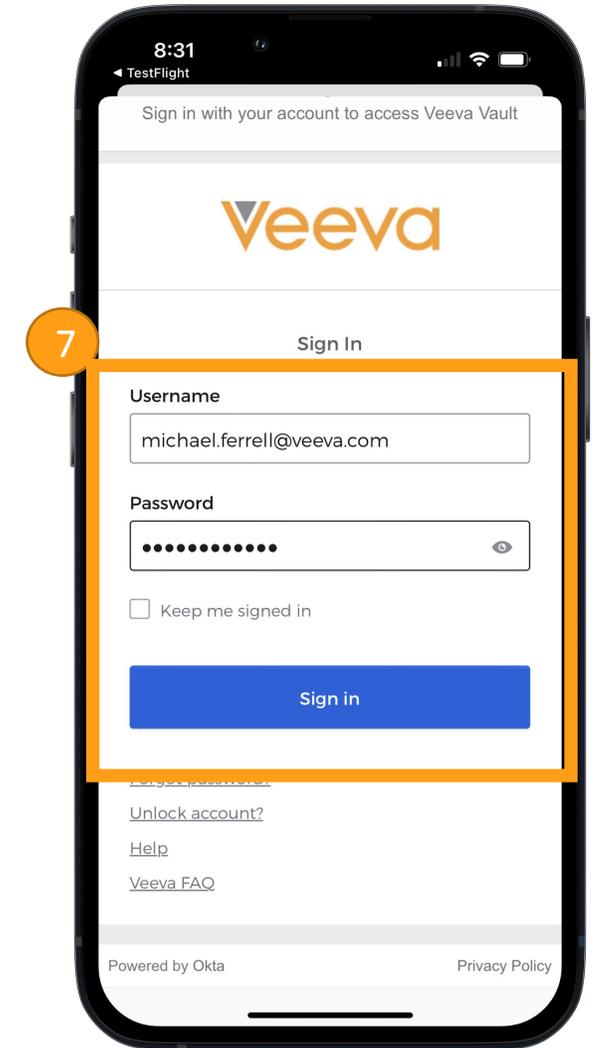
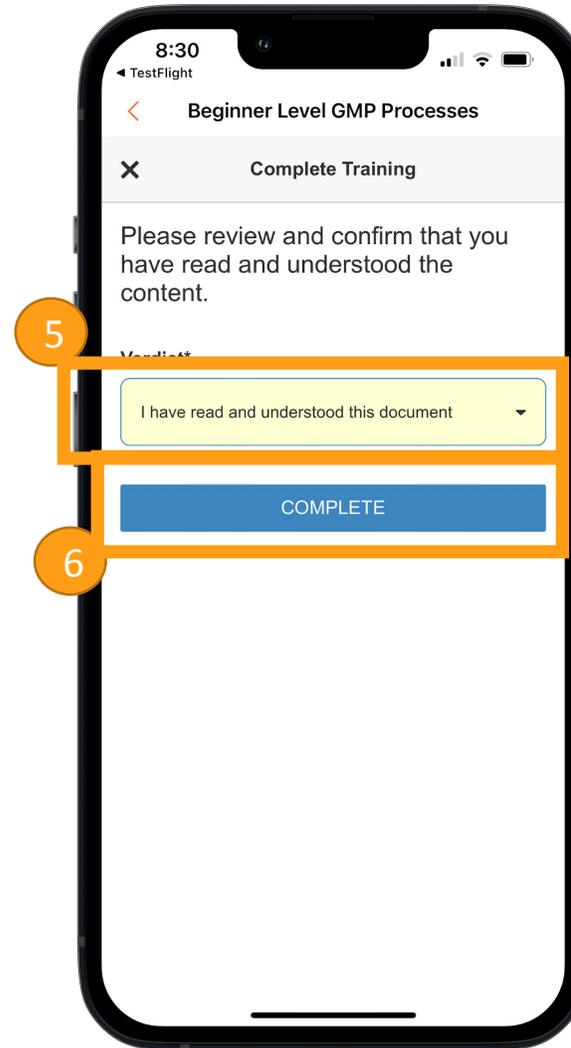
Completing Workflow Tasks

3. For **Document Training Assignments**, review the details and tap **Begin Training**
4. Review the document and tap **Complete** when done



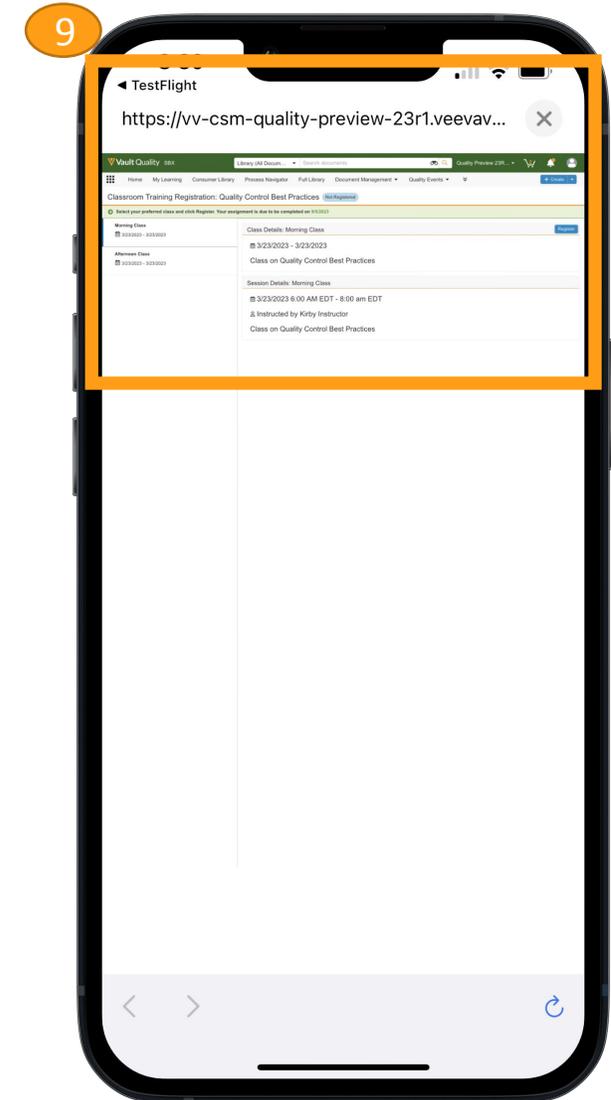
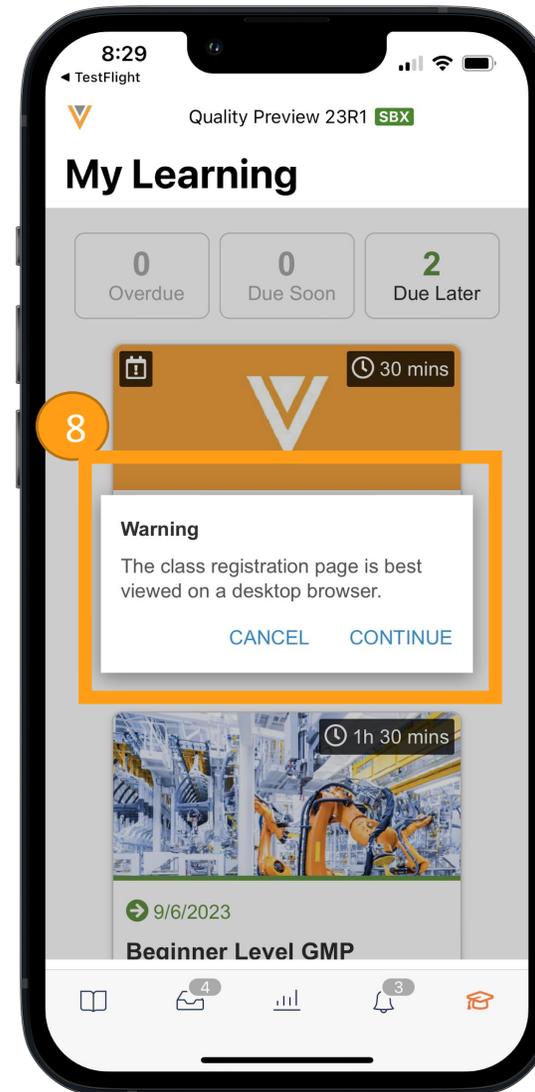
Completing Workflow Tasks

5. Apply the **Verdict**
6. Tap **Complete**
7. Follow steps to authenticate
 - Example here is a Vault setup for Single Sign-On with Okta



Completing Workflow Tasks

8. If the task is not a Document Training Assignment, Vault will alert that the action much be taken in a browser
 - The best user experience in these instances will be the desktop browser
9. Tapping **Continue** will open a mobile browser window





Thank you