



Veeva Vault Integration Upgrade Guide

Version 7.1

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1 Introduction

1.1 Overview

This manual describes the process of upgrading existing 7.0 PleaseReview system integrated with Veeva Vault to the latest release.

PleaseReview Veeva Vault integration is included with the PleaseReview Server therefore upgrading the PleaseReview Server will also upgrade the Veeva Vault integration components. If you have any doubts, please contact Ideagen support for guidance.

It is required that the PleaseReview system is integrated with Veeva Vault and the integration is fully operational before applying the upgrade.

1.2 Scope

This manual covers upgrading from PleaseReview Veeva Vault integration 7.0 to the latest 7.1 release.

Note:

- For upgrade from **v7.1.1** to v7.1.2, please only perform the steps that begins with "[For v7.1.1 upgrade to v7.1.2]"
- For upgrade from **v7.0.x** to v7.1.2, please follow all the steps including those with "[For v7.1.1 upgrade to v7.1.2]"
- Section 6.2.3.5 Restrict User Actions with "PleaseReview Type" Condition is a consideration applicable to "Ready for PleaseReview" state for upgrade from v7.0.x or v7.1.1 to v7.1.2

If you are upgrading from a previous version, you will first need to patch both PleaseReview and the Veeva Vault system connector up to version 7.0 and then make the necessary Vault configuration changes as outlined in section 5.1.

1.3 Structure of this manual

This document contains the following sections:

- Section 2 discusses considerations you will need to be aware of when planning the upgrade, such as changes to platform requirements, or the impact on your existing data.
- Section 3 provides a simple "checklist" overview of the upgrade process.
- Sections 4, 5 and 6 guide you through the upgrade process step-by-step.

2 Upgrade considerations

Note that this section does not discuss functional enhancements in the latest version of PleaseReview Veeva Vault integration other than where they impact the upgrade process. Please refer to PleaseReview v7.1 Veeva Vault Integration TRN for functional enhancements.

For general PleaseReview upgrade considerations, refer to PleaseReview v7.1 Upgrade Guide.

3 Overview of the upgrade process

The upgrade process for PleaseReview Veeva Vault integration 7.0 to 7.1 consists of the following steps:

- Update the Vault configuration file
- System connector updates
- Update the Veeva Vault configuration
- Test

4 Prerequisites

The upgrade process for Veeva Vault integration follows the upgrade for PleaseReview Server. Please ensure that PleaseReview Server is upgraded to 7.1 prior to this. Please refer to PleaseReview v7.1 Upgrade Guide for PleaseReview Server upgrade.

PleaseReview includes all the released system connectors as part of the main download since v6.4. Note that you are only permitted to use those system connectors and integrations your license permits you to. Check the individual release notes for any required system connector to ascertain what additional components may be required.

4.1 Customisations

If you have made additional changes over and above the standard installation process (e.g., advanced configuration or rebranding), you should also have a record of what has been changed so that you can reapply these changes. You may also find it useful to have a copy of your original PleaseReview installation package to refer to in case there are any doubts about exactly what has been changed.

Step not required Step Completed Step Failed

Date and Signature:

5 Upgrade process

It is assumed that at this point the PleaseReview Server has already been upgraded.

Note that if you are using any of our integrations and there is a new version of the integration available, you must update the integration at the same time as the server.

5.1 Update the Vault Configuration

Update the “..\config\VeevaVaultLogin.xml” file to include the following changes:

- **For each** <VeevaVaultServer> in your VeevaVaultLogin.xml file
 - The API version setting should be set to v21.2 in order to be able to use these latest settings :
<Version>**v21.2**</Version>
 - The <KeepAlive> API version should be set to v21.2 in order to control the session keep alive:
<KeepAliveUrl>**v21.2**/metadata/objects</KeepAliveUrl>
 - Remove the API limits below as Vault no longer enforces daily API limits:
<BurstLimitThreshold>200</BurstLimitThreshold>
<DailyLimitThreshold>1000</DailyLimitThreshold>
<ApiLimitThrottlingDelay>2000</ApiLimitThrottlingDelay>
 - Update <ReturnBinders> to false to disallow add binder on Veeva Centric:
<ReturnBinders>**false**</ReturnBinders>
 - Remove the settings below which are no longer in use in PleaseReview:
<AttachParticipantGroups>>true</AttachParticipantGroups>
<CheckInComment>Reviewers:</CheckInComment>
 - Add the new entry in between the <VaultUISettings> tags:
<FieldNextAction>pleasereview_next_action__c</FieldNextAction>
<**FieldTitle**>pleasereview_title__c</**FieldTitle**>
 - Update the settings below which are used by the workflow when “Start Review”:

```

<ParamDueDate>Due Date</ParamDueDate>
<ParamDueDateAdvanced>PleaseReview Due Date</ParamDueDateAdvanced>
<ParamAuthors>PleaseReview Author (s)</ParamAuthors>
<ParamContributors>PleaseReview Contributor (s)</ParamContributors>
<ParamReviewers>PleaseReview Reviewer (s)</ParamReviewers>
<ParamSuperContributors>PleaseReview Super-Contributor (s)</ParamSuperContributors>
<ParamAuthorContributors>PleaseReview Author-Contributor (s)</ParamAuthorContributors>
<ParamViewers>PleaseReview Viewer (s)</ParamViewers>

```

- **[For v7.1.1 upgrade to v7.1.2] 1)** Add the new settings below in between the <VaultUISettings> tags which are used by the workflow “Invite to PleaseReview” and, **2)** update the Document Sharing Settings for “Invite to PleaseReview” workflow at Veeva Vault by referring to PleaseReview v7.1 Veeva Vault Installation Guide (section: Adding Lifecycle Workflow “Invite to PleaseReview”):

```

<DocumentTaskAuthor>PleaseReview Author Task</DocumentTaskAuthor>
<DocumentTaskContributor>PleaseReview Contributor Task</DocumentTaskContributor>
<DocumentTaskReviewer>PleaseReview Reviewer Task</DocumentTaskReviewer>
<DocumentTaskSuperContributor>PleaseReview Super-Contributor Task</DocumentTaskSuperContributor>
<DocumentTaskAuthorContributor>PleaseReview Author-Contributor Task</DocumentTaskAuthorContributor>
<DocumentTaskViewer>PleaseReview Viewer Task</DocumentTaskViewer>

```

- After the <AttachReconReport> entry, add the following settings to support multiple document lifecycles with Document Workflows:

```

<AttachReconReport>Short</AttachReconReport>
<WorkflowSettings>
  <WorkflowSetting>
    <Lifecycle>PleaseReview Lifecycle</Lifecycle>
    <ActionCancelPRName>Objectworkflow.cancel_pleasereview__c</ActionCancelPRName>
    <ActionCreatePRName>Objectworkflow.create_pleasereview__c</ActionCreatePRName>
    <ActionUndoCreatePRName>Objectworkflow.undo_create_pleasereview__c</ActionUndoCreatePRName>
    <ActionInviteToPRName>Objectworkflow.invite_to_pleasereview__c</ActionInviteToPRName>
    <ActionFinishPRName>Objectworkflow.finish_pleasereview__c</ActionFinishPRName>
  </WorkflowSetting>
</WorkflowSettings>

```

- **[For v7.1.1 upgrade to v7.1.2]** After </VaultUISettings>, add the following settings to support web request timeout for “Invite to PleaseReview” workflow. The default value is 100000 milliseconds:

```
</VaultUISettings>  
<WebRequestTimeout>  
    <!-- Milliseconds -->  
    <InviteToPleaseReview>100000<InviteToPleaseReview/>  
</WebRequestTimeout/>
```

Step not required Step Completed Step Failed

Date and Signature:

5.2 System connector updates

To upgrade a system connector, you must copy your entries from your existing configuration files into the new template files in case the templates have changed. Please refer to the relevant system connector installation guide for more details.

Step not required Step Completed Step Failed

Date and Signature:

5.3 Restart the processes

To complete the upgrade, restart both the IIS Application Pool and the TaraService process. The system is now ready to test.

Step not required Step Completed Step Failed

Date and Signature:

6 Configuring the Vault-UI integration (if applicable)

This section outlines the configuration changes for PleaseReview in Vault-centric mode. The configurations will need to be carried out within the Vault Admin screens.

The Document Workflows (or One Workflow initiative) is introduced in PleaseReview Veeva Vault integration v7.1 to allow review for single or multiple documents. Therefore, new configurations are required to support Legacy Workflows and Document Workflows.

6.1 PleaseReview Document Fields

Log into the Vault you are integrating with as an admin user and go to the `Admin` section and click on the `Configuration` tab. You will now be editing document fields that are needed by PleaseReview.

Note - In this section the PleaseReview Document fields are assume added to the Base document type, however it is possible that these fields were added to only the document types you plan to use PleaseReview on.

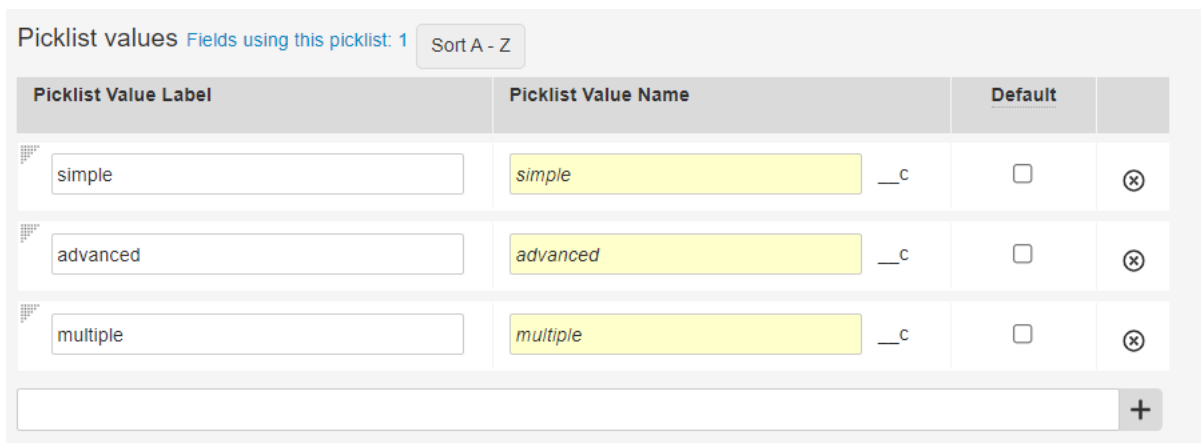
Select the `Document Fields` under `Document Setup` section and then under `Field Location` select `Base Document`.

6.1.1 Editing the “PleaseReview Type” field

Under `Base Document`, scroll down to locate `PleaseReview Type` field. Then, click on `PleaseReview Type` field to display the `Details` screen.

Press `Edit` button to add a new picklist value.

Under `Picklist values`, add `multiple` value as shown below:



Picklist Value Label	Picklist Value Name	Default	
<input type="text" value="simple"/>	<input type="text" value="simple"/> ___c	<input type="checkbox"/>	<input type="button" value="⊗"/>
<input type="text" value="advanced"/>	<input type="text" value="advanced"/> ___c	<input type="checkbox"/>	<input type="button" value="⊗"/>
<input type="text" value="multiple"/>	<input type="text" value="multiple"/> ___c	<input type="checkbox"/>	<input type="button" value="⊗"/>
			<input type="button" value="+"/>

Now, press `Save`.

Step not required
 Step Completed
 Step Failed

Date and Signature:

6.2 PleaseReview Lifecycle

A majority of the configuration changes detailed in this section are Document Lifecycle specific. In the installation guide all lifecycle changes were made to the PleaseReview lifecycle, however it is possible to add them to any other lifecycle if desired. If an alternative lifecycle was used in your original

installation, the same should be done now. The examples in the documentation assume you will be using the PleaseReview Lifecycle.

6.2.1 Add "Legacy" suffix to Label

To continue support the usage of Legacy Workflows in Vault, the labels will require editing.

6.2.2 Edit Legacy Workflows

Go to the `Vault Admin` screens, click on the `Configuration` tab and then select `Document Lifecycles` under `Business Logic` section.

Click on `PleaseReview Lifecycle` document lifecycle, and then select the `Legacy Workflows` tab. Next, click the `Prepare PleaseReview`.

Press on the `Edit` button. Under `Workflow Details`, add `(Legacy)` suffix to workflow `Label`. An example is shown below:

[Document Lifecycles](#) > [PleaseReview Lifecycle](#) > [Legacy Workflows](#) >

Prepare PleaseReview ?

Workflow Details

Label*

Name `prepare_pleasereview__c`

Description

Version `5`

Status `Active`

Type

Used By States `Draft`

Bulk Email Message

Now, press `Save`.

Repeat editing the `Label` for remaining PleaseReview Legacy Workflows as shown below:

[Document Lifecycles](#) >

PleaseReview Lifecycle

Legacy Workflows ?			
Label	Name	Description	Status
Cancel PleaseReview (Legacy)	<code>cancel_pleasereview__c</code>	Undoes the PleaseReview preparation.	Active
Create PleaseReview (Legacy)	<code>create_pleasereview__c</code>	For documents already submitted to PleaseReview (via the custom action), this workflow changes the state to 'In Create PleaseReview' so as to hand control to PleaseReview. Called via API.	Active
Finish PleaseReview (Legacy)	<code>finish_pleasereview__c</code>	This workflow returns the document to its original state once the review has been completed by the owner. Called via API.	Active
Invite to PleaseReview (Legacy)	<code>invite_to_pleasereview__c</code>	For reviews already created in PleaseReview (via the custom action), this workflow invites reviewers to participate in the review. Called via API.	Active
Prepare Advanced PleaseReview (Legacy)	<code>prepare_advanced_pleasereview__c</code>	Used to prepare an advanced review.	Active
Prepare PleaseReview (Legacy)	<code>prepare_pleasereview__c</code>	Used to prepare a simple review.	Active
Undo Create PleaseReview (Legacy)	<code>undo_create_pleasereview__c</code>	For reviews the have failed creation in PleaseReview, this workflow returns the state to 'Ready for PleaseReview' so the review can be cancelled. Called via API.	Active

Step not required Step Completed Step Failed

Date and Signature:

6.2.3 Edit User Actions

Whilst still in the `PleaseReview Lifecycle` page, click on the `States` tab.

6.2.3.1 Edit User Actions “Draft” State

The Document Workflows allow review for single or multiple documents. Therefore, the `Prepare PleaseReview` and `Prepare Advanced Review` legacy workflow actions need to be removed from `Draft` state to stop user from creating review using Legacy Workflows.

Click the `Draft` state and followed by the `User Actions` tab. Then press on the `Edit` button.

Remove `Rule 1`, `Rule 2` and `Rule 3` which using `Prepare PleaseReview` and `Prepare Advanced Review` legacy workflow actions as shown below:

Document Lifecycles > PleaseReview Lifecycle > States > Draft

User Actions

Details
User Actions
Security Settings
Entry Criteria
Entry Actions
Atomic Security

Cancel
Save

Rule 1 ✕

Always Perform with conditions

If Binder ✕
equals No

[Add condition](#)

Allow the following actions

✕
 Workflow Display action in All Actions menu
 Prepare PleaseReview
Action Label*
 Prepare PleaseReview

[Add Action](#)

Rule 2 ✕

Always Perform with conditions

If Binder ✕
equals No

[Add condition](#)

Allow the following actions

✕
 Workflow Display action in All Actions menu
 Prepare Advanced PleaseReview
Action Label*
 Prepare Advanced PleaseReview

[Add Action](#)

Rule 3 ✕

Always Perform with conditions

If Binder ✕
equals Yes

[Add condition](#)

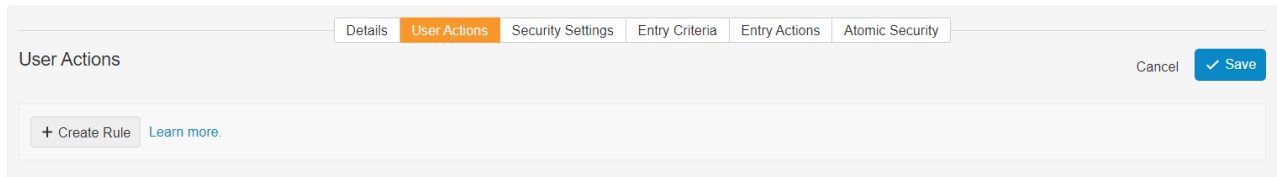
Allow the following actions

✕
 Workflow Display action in All Actions menu
 Prepare Advanced PleaseReview
Action Label*
 Prepare Advanced PleaseReview

[Add Action](#)

Now, press `save`. An example of how this should look is shown below:

Document Lifecycles > PleaseReview Lifecycle > States > Draft



Step not required
 Step Completed
 Step Failed

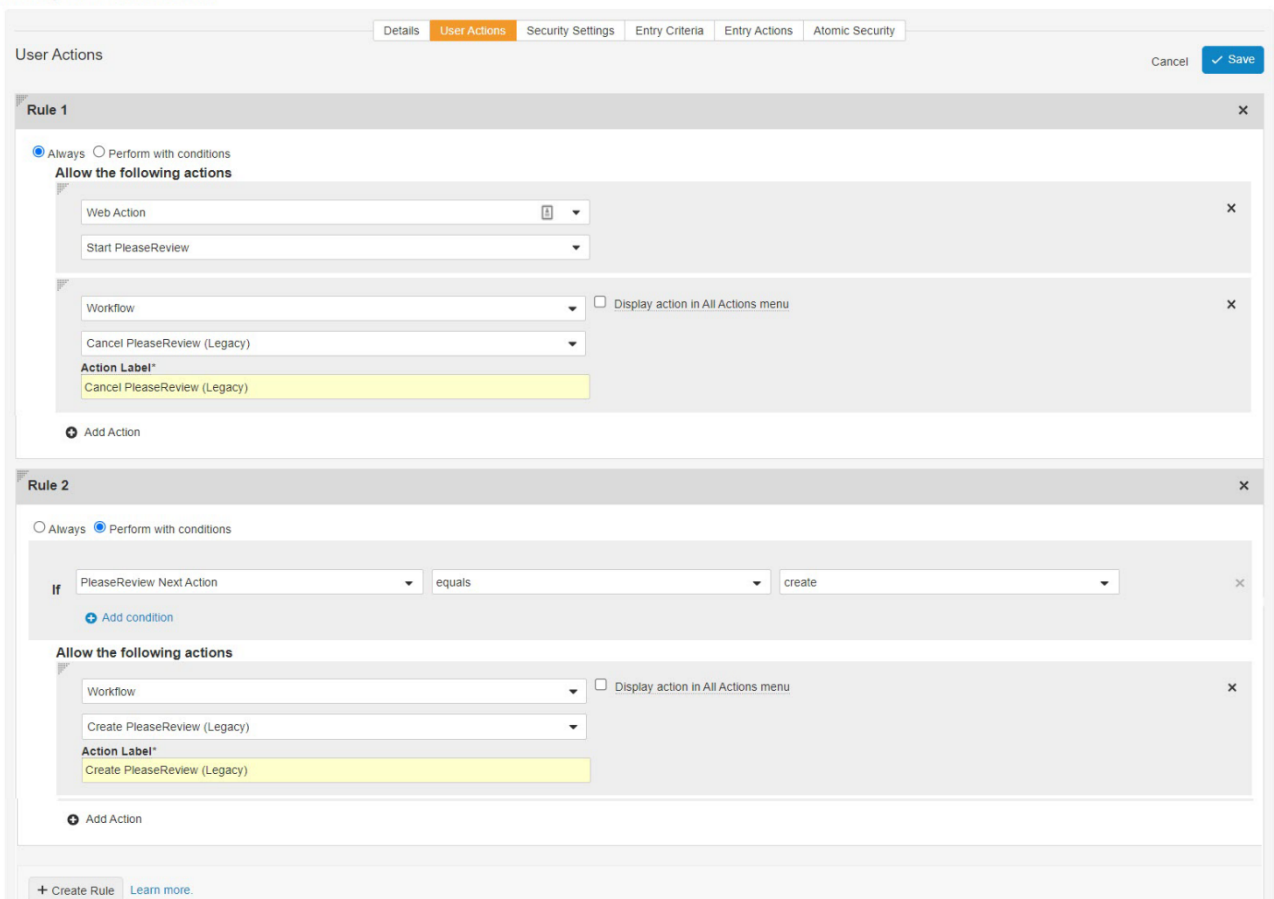
Date and Signature:

6.2.3.2 Edit User Actions “Ready for PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the Ready for PleaseReview state and followed by the User Actions tab. Then press on the Edit button.

Locate legacy workflow actions (i.e., Cancel PleaseReview (Legacy) workflow). Then add (Legacy) suffix to Action Label. Repeat adding the same suffix for the remaining PleaseReview legacy workflow actions. An example is shown below:

Document Lifecycles > PleaseReview Lifecycle > States > Ready for PleaseReview



Now, press Save.

Step not required
 Step Completed
 Step Failed

Date and Signature:

6.2.3.3 Edit User Actions “In Create PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the In Create PleaseReview state and followed by the User Actions tab. Then press on the Edit button.

Locate legacy workflow actions (i.e., Invite to PleaseReview (Legacy) workflow). Then add (Legacy) suffix to Action Label. Repeat adding the same suffix for the remaining PleaseReview legacy workflow actions. An example is shown below:

Document Lifecycles > PleaseReview Lifecycle > States > In Create PleaseReview

User Actions
Cancel

Rule 1 ✕

Always Perform with conditions

If PleaseReview Next Action equals invite

[Add condition](#)

Allow the following actions

Workflow Display action in All Actions menu

Invite to PleaseReview (Legacy)

Action Label*
Invite to PleaseReview (Legacy)

[Add Action](#)

Rule 2 ✕

Always Perform with conditions

If PleaseReview Next Action equals undo

[Add condition](#)

Allow the following actions

Workflow Display action in All Actions menu

Undo Create PleaseReview (Legacy)

Action Label*
Undo Create PleaseReview (Legacy)

[Add Action](#)

[+ Create Rule](#)
[Learn more.](#)

Now, press Save.

Step not required
 Step Completed
 Step Failed

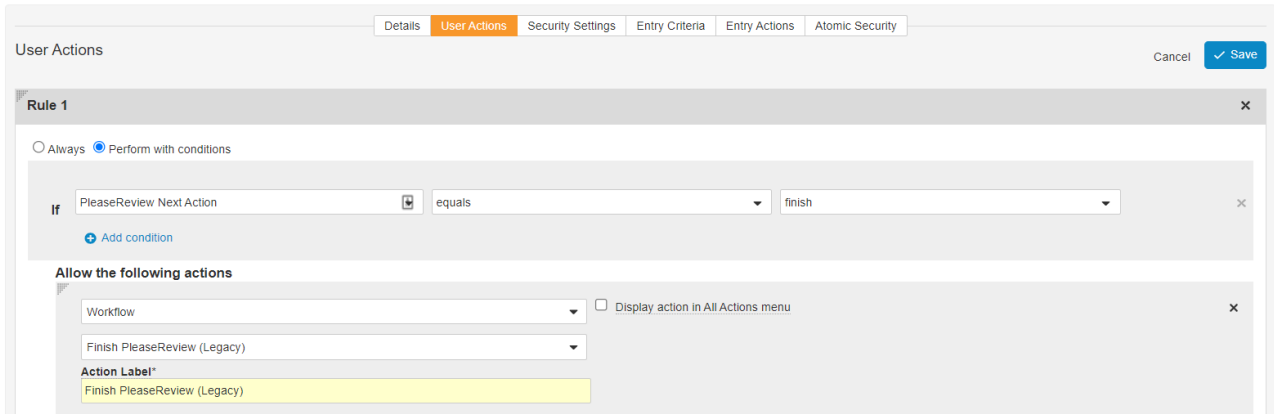
 Date and Signature:

6.2.3.4 Edit User Actions “In PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the In PleaseReview state and followed by the User Actions tab. Then press on the Edit button.

Locate legacy workflow actions (i.e., Finish PleaseReview (Legacy) workflow). Then add (Legacy) suffix to Action Label. Repeat adding the same suffix for the remaining PleaseReview legacy workflow actions. An example is shown below:

Document Lifecycles > PleaseReview Lifecycle > States > In PleaseReview



Now, press Save.

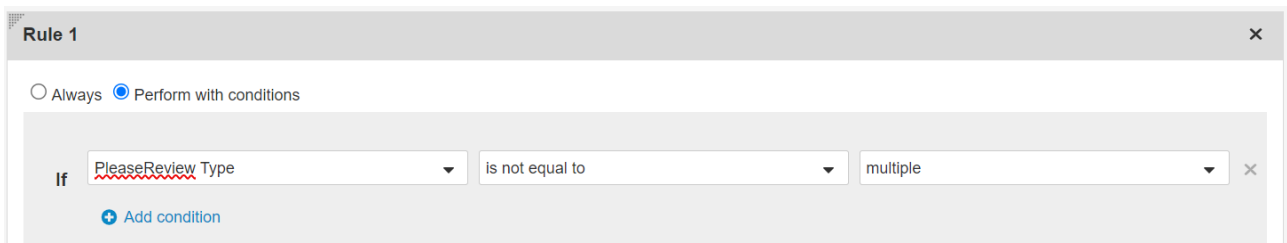
Step not required Step Completed Step Failed

Date and Signature:

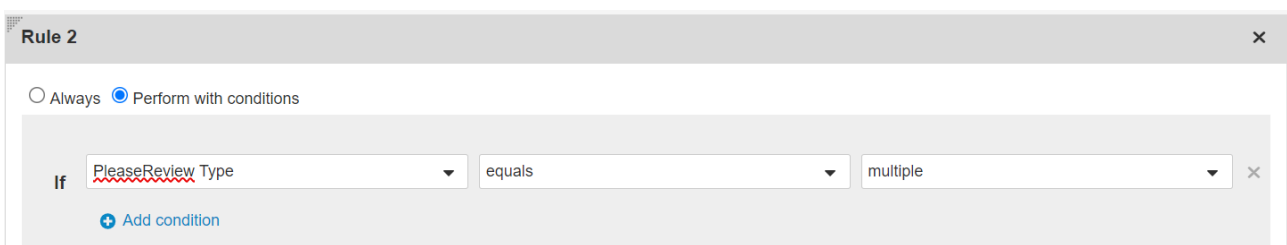
6.2.3.5 Restrict User Actions with “PleaseReview Type” Condition

Vault administrator can choose to add PleaseReview Type condition to restrict user actions to within a Legacy Workflows or Document Workflows. This is so that Legacy Workflows options will not appear for a Document Workflows review and vice-versa, Document Workflows options will not appear for a Legacy Workflows review. Example:

Condition for Legacy Workflows:



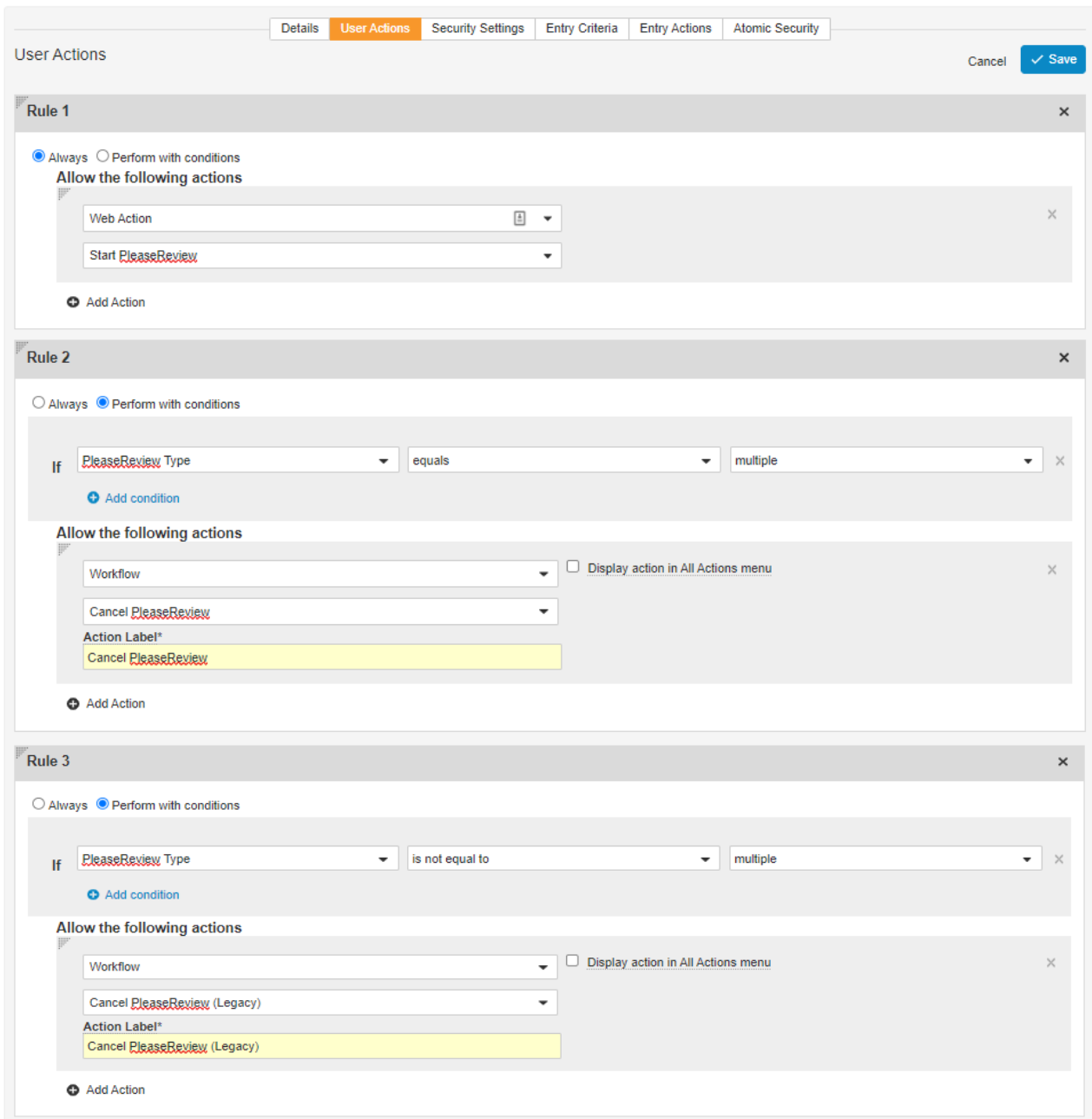
Condition for Document Workflows:



This is applicable to Ready for PleaseReview state. In the PleaseReview Lifecycle page, click on the States tab. Next, click the Ready for PleaseReview state followed by the User Actions tab. Then press on the Edit button. You can now add PleaseReview Type condition for Legacy Workflows or Document Workflows.

Example below shows how to add the User Action rules for both Legacy Workflows and Document Workflows with their corresponding actions:

Document Lifecycles > PleaseReview Lifecycle > States > Ready for PleaseReview



User Actions [Cancel] [Save]

Rule 1

Always Perform with conditions

Allow the following actions

- Web Action
- Start PleaseReview

+ Add Action

Rule 2

Always Perform with conditions

If PleaseReview Type equals multiple

+ Add condition

Allow the following actions

- Workflow Display action in All Actions menu
- Cancel PleaseReview

Action Label*
Cancel PleaseReview

+ Add Action

Rule 3

Always Perform with conditions

If PleaseReview Type is not equal to multiple

+ Add condition

Allow the following actions

- Workflow Display action in All Actions menu
- Cancel PleaseReview (Legacy)

Action Label*
Cancel PleaseReview (Legacy)

+ Add Action

Now, press Save.

[Document Lifecycles](#) > [PleaseReview Lifecycle](#) > [States](#) >
 Ready for PleaseReview

User Actions ?			Edit
1	Always	<input checked="" type="checkbox"/> Web Action: Start PleaseReview	
2	If PleaseReview Type equals multiple	Workflow: Cancel PleaseReview	
3	If PleaseReview Type is not equal to multiple	Workflow: Cancel PleaseReview (Legacy)	
4	If PleaseReview Next Action equals create	Workflow: Create PleaseReview (Legacy) Workflow: Create PleaseReview	

Step not required Step Completed Step Failed

Date and Signature:

6.2.4 Edit Security Settings

Go to the [Vault Admin](#) screens, click on the [Configuration](#) tab and select [Document Lifecycles](#) under [Business Logic](#) section.

Then, click on [PleaseReview Lifecycle](#) document lifecycle and select the [States](#) tab.

6.2.4.1 Edit Security Settings “Draft” State

Click on the [Draft](#) state followed by the [Security Settings](#) tab. Then press on the [Edit](#) button, update the settings as shown below then press [Save](#):

[Document Lifecycles](#) > [PleaseReview Lifecycle](#) > [States](#) >
 Draft

Security Settings ?																	Edit
Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate	Create Anchors	Version	Download Source	Edit Document	Manage Viewable Rendition	Reclassify	Multi-Channel Actions	Change Owner	Change Coordinator	Delete	
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Coordinator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					
Viewer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															
Consumer																	
Reviewer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															
Approver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															
Trainee	<input checked="" type="checkbox"/>																
PleaseReview Author																	
PleaseReview Author-Contributor																	
PleaseReview Contributor																	
PleaseReview Owner																	
PleaseReview Reviewer																	
PleaseReview Super-Contributor																	
PleaseReview Viewer																	

Step not required Step Completed Step Failed

Date and Signature:

6.2.4.2 Edit Security Settings “Ready for PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the Ready for PleaseReview state followed by the Security Settings tab. Then press on the Edit button, update the settings as shown below then press Save:

Document Lifecycles > PleaseReview Lifecycle > States > Ready for PleaseReview

Security Settings																
Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate	Create Anchors	Version	Download Source	Edit Document	Manage Viewable Rendition	Reclassify	Multi-Channel Actions	Change Owner	Change Coordinator	Delete
Owner	✓	✓	✓	✓					✓	✓						
Coordinator	✓	✓														
Editor	✓	✓	✓	✓					✓	✓						
Viewer	✓	✓														
Consumer																
Reviewer																
Approver																
Trainee																
PleaseReview w Author	✓	✓	✓	✓												
PleaseReview w Author-Contributor	✓	✓	✓	✓												
PleaseReview w Contributor	✓	✓														
PleaseReview w Owner	✓	✓	✓	✓												
PleaseReview w Reviewer	✓	✓														
PleaseReview w Super-Contributor	✓	✓	✓	✓												
PleaseReview w Viewer	✓	✓														

Step not required
 Step Completed
 Step Failed
 Date and Signature:

6.2.4.3 Edit Security Settings “In Create PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the In Create PleaseReview state followed by the Security Settings tab. Then press the Edit button, update the settings as shown below then press Save:

Document Lifecycles > PleaseReview Lifecycle > States > In Create PleaseReview

Security Settings																
Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate	Create Anchors	Version	Download Source	Edit Document	Manage Viewable Rendition	Reclassify	Multi-Channel Actions	Change Owner	Change Coordinator	Delete
Owner	✓	✓	✓	✓					✓	✓						
Coordinator	✓	✓														
Editor	✓	✓	✓	✓					✓	✓						
Viewer	✓	✓														
Consumer																
Reviewer	✓	✓														
Approver																
Trainee	✓	✓														
PleaseReview w Author	✓	✓														
PleaseReview w Author-Contributor	✓	✓														
PleaseReview w Contributor	✓	✓														
PleaseReview w Owner	✓	✓														
PleaseReview w Reviewer	✓	✓														
PleaseReview w Super-Contributor	✓	✓														
PleaseReview w Viewer	✓	✓														

Step not required
 Step Completed
 Step Failed
 Date and Signature:

6.2.4.4 Edit Security Settings “In PleaseReview” State

Whilst still in the PleaseReview Lifecycle page, click on the States tab. Next, click the In PleaseReview state followed by the Security Settings tab. Then press on the Edit button, update the settings as shown below then press Save:

Document Lifecycles > PleaseReview Lifecycle > States > In PleaseReview

Security Settings																Edit
Role	View Document	View Content	Edit Fields	Edit Relationships	Edit Sharing Settings	Annotate	Create Anchors	Version	Download Source	Edit Document	Manage Viewable Rendition	Reclassify	Multi-Channel Actions	Change Owner	Change Coordinator	Delete
Owner	✓	✓	✓	✓					✓	✓						
Coordinator									✓	✓						
Editor	✓	✓	✓	✓					✓	✓						
Viewer																
Consumer																
Reviewer																
Approver																
Trainee																
PleaseReview Author	✓	✓														
PleaseReview Author Contributor	✓	✓														
PleaseReview Contributor	✓	✓														
PleaseReview Owner	✓	✓	✓	✓												
PleaseReview Reviewer	✓	✓														
PleaseReview Super-Contributor	✓	✓														
PleaseReview Viewer	✓	✓														

Step not required Step Completed Step Failed

Date and Signature:

6.3 Edit Document Messages

Go to the Vault Admin screens, click on the Configuration tab and then select Document Messages under Email & Notifications section.

6.3.1 Edit “PleaseReview Complete” Document Message

Click on PleaseReview Complete document message. Then press the Edit button. Under Details, add (Legacy) suffix to Label (i.e., PleaseReview Complete (Legacy)). An example is shown below:

Document Messages >
 PleaseReview Complete ?

Details

Label* PleaseReview Complete (Legacy)

Name* pleasereview_complete_legacy _c

Status* Active

Source Custom

Description

Message Text

Subject* Review \${name_v} tasks are complete

Notification Text* Please go to
 https://yourcompany.veevavault.net/ui/#/OTB000000
 000Y01 and complete the review.

Some text formatting with HTML tags is permitted. [Learn more.](#)

Email Body* \${notificationMessage}
 \${taskDecisionComments}

Some text formatting with HTML tags is permitted. [Learn more.](#)

Now, press Save.

Step not required
 Step Completed
 Step Failed

Date and Signature:

6.3.2 Edit “PleaseReview Review Task” Document Message

Whilst still in the Document Messages page, click on PleaseReview Review Task document message. Then press the Edit button. Under Details, add (Legacy) suffix to Label (i.e., PleaseReview Review Task (Legacy)). An example is shown below:

Document Messages >

PleaseReview Review Task ?

Details

Label*

Name* __c

Status* Active ▾

Source Custom

Description

Message Text

Subject*

Notification Text*

Some text formatting with HTML tags is permitted. [Learn more.](#)

Email Body*

Some text formatting with HTML tags is permitted. [Learn more.](#)

Now, press Save.

Step not required Step Completed Step Failed

Date and Signature:

6.4 Setup Document Workflows

The steps below are required to set up Document Workflows into existing document lifecycle (i.e., PleaseReview Lifecycle) by referring to PleaseReview v7.1 Veeva Vault Installation Guide.

1. Refer to section 4.2.5 Email & Notification Messages to add Object Messages
2. Refer to sections below to add Document Workflows:
 - o 4.2.6.12 Adding Lifecycle Workflow "Prepare PleaseReview"
 - o 4.2.6.13 Adding Lifecycle Workflow "Cancel PleaseReview"
 - o 4.2.6.14 Adding Lifecycle Workflow "Create PleaseReview"
 - o 4.2.6.15 Adding Lifecycle Workflow "Undo Create PleaseReview"
 - o 4.2.6.16 Adding Lifecycle Workflow "Invite to PleaseReview"
 - o 4.2.6.17 Adding Lifecycle Workflow "Finish PleaseReview"

Note: Vault will append '1' to all Document Workflows Name when duplicated Name is detected in Legacy Workflows Name. Undo this by removing the appended '1' automatically set by Vault to match the Name value for each Document Workflows in the sections above.

3. Refer to sections below to add User Actions to State:
 - o 4.2.6.18 Adding User Actions to State "Draft"
 - o 4.2.6.19 Adding User Actions to State "Ready for PleaseReview"
 - o 4.2.6.20 Adding User Actions to State "In Create PleaseReview"
 - o 4.2.6.21 Adding User Actions to State "In PleaseReview"

Step not required Step Completed Step Failed

Date and Signature:

7 Testing

To verify that the upgrade has been successful, the following basic tests are proposed:

- In an existing review, verify that:
 - It is possible to complete the workflow for all on-going simple review which uses Legacy Workflows
 - It is possible to complete the workflow for all on-going advanced review which uses Legacy Workflows
 - It is possible to complete the workflow for all on-going binder review which uses Legacy Workflows
- Create a new review and verify that:
 - It is possible to create a review with single document using Document Workflows
 - It is possible to create a review with multiple documents using Document Workflows

If some users encounter strange behavior in the web UI shortly after upgrading, there is a possibility that the client's browser might still be referring to a cached image, style sheet or JavaScript file. In this instance we would recommend that the user clears their browser cache.

Step not required Step Completed Step Failed

Date and Signature:

8 Notices

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