ABOUT THE
25R3 RELEASE

RELEASE HIGHLIGHTS

- What's New in Veeva Clinical Data for 25R3 course available for self-enrollment in Veeva Training

- Highlights key features added to Veeva Clinical Data in 25R3

- Filter the course by role to find features relevant to your role and tasks

- New features have been incorporated into relevant courses for the most up-to-date course content

DECEMBER 2025

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Course Updates for 25R3

EDC

- **Hands-on Practice** has been added to the following courses to simulate role-based tasks: **Freezing and Locking Data by Subject, Local Labs for Sites, Protocol Deviations, Reports and Dashboards, Snapshots, and SDV/DMR**
- **Coder Tools** now includes walkthroughs of the new **Query Templates** and **Dictionary License Validation** tabs in Coder Settings
- The new **Completion Guidelines** feature is now discussed in **Data Entry in Veeva EDC** and **EDC Tools** courses
- **Local Labs** content has been updated with new **Item Property Panel** updates and **Age Range Enhancements for Normal Ranges**
- The **Safety Administration** course now gives the option to **view E2B or Veeva Safety-EDC Connection content** to align with your safety connection

CDB

- **Query Workflow** now includes new **Listing-defined Quick Queries** and **Dynamic Messages** features for quicker query management
- **Dynamic Messages** content also available for Observations as detailed in **Working with Listings, Data Review Workflow and Review Listings**
- Learn how to view and create **Protocol Deviations** in CDB in the **Data Review Workflow** and **Review Listings** courses
- Upload third-party data easier using the **Package Loader** feature explained in the **Data Import for Vendors** course

Course Objectives and Time Estimates

EDC Courses

Time estimates are based on historical completion data and do not include optional activities. Individual learners may complete training at their own pace.

All in One: Vault CDMS for Principal Investigators
Estimate: 9 minutes
- Create new casebooks and enter data into forms and events
- Perform actions for fields and forms
- Answer a manual and system-generated query
- Manage your account and password security
- Discuss why signatures are required
- Sign subject forms/event dates/visit methods

Coder Approval Workflow
Estimate: 5 minutes
- Approve a coding request
- Reject a coding request

Coder Overview
Estimate: 5 minutes
- Navigate the summary page and listing page
- Search, filter, and sort code requests and dictionaries
- Access Vault CDMS Help

Coder Queries and Notes
Estimate: 4 minutes
- Post and close queries
- Attach a note to the code request

Coder Tools
Estimate: 11 minutes
- Modify default study settings and study settings
- Create and edit Synonym Lists
- Add a verbatim to a Do Not Autocode list
- Describe an Upversion Impact Report

Course Objectives and Time Estimates

EDC Courses

Coding in CDMS
Estimate: 9 minutes
- Code a code request
- Batch code
- Uncode
- Describe how Autocoding works

Data Entry in Vault EDC
Estimate: 14 minutes
- Create new casebooks
- Enter data into forms and events
- Track progress of data entry at your site

Data Loader
Estimate: 6 minutes
- Import data into EDC using Data Loader
- View the import history

EDC Overview
Estimate: 7 minutes
- Navigate Vault EDC
- Locate and use help tools

EDC Tools
Estimate: 8 minutes
- Perform Study Administration Tasks
- Lock a site and study
- Generate Closeout PDFs

Exporting PDFs
Estimate: 3 minutes
- Export Blank and Detail PDFs
- Review Closeout PDFs

Freezing and Locking Data by Subject
Estimate: 4 minutes
- Freeze and lock casebooks, event dates, visit methods, forms, events, and items by subject

Course Objectives and Time Estimates

EDC Courses

Imaging: Exam Upload and Verification
Estimate: 10 minutes
- Enable imaging for a study
- Upload images in the Data Entry workflow
- Recognize errors and perform actions to correct them

Local Labs
Estimate: 17 minutes
- Perform tasks to assist in Local Labs configuration
- Maintain the Local Labs Module

Local Labs for Sites
Estimate: 4 minutes
- Enter results using the Local Labs module
- Review results for Clinical Significance

Managing Jobs on the Review Tab
Estimate: 3 minutes
- Run and schedule reports and listings on the Review tab
- Access and download reports and listings files

Medical Assessments
Estimate: 4 minutes
- Understand why medical assessments are used
- Perform assessments and reassessments

Protocol Deviations
Estimate: 5 minutes
- Create a Protocol Deviation at the subject, event, form and item levels
- Edit Protocol Deviations
- Review Protocol Deviations
- Access a listing of existing Protocol Deviations

Providing an eSignature
Estimate: 5 minutes
- Manage your account and password security
- Discuss why signatures are required
- Sign subject forms, event dates and visit methods

Veeva

Course Objectives and Time Estimates

Queries in Vault EDC
Estimate: 11 minutes
- Opening, answering and closing a manual query
- Addressing system-generated queries

Randomization
Estimate: 9 minutes
- Configure randomization study settings and treatments
- Manage and upload randomization lists
- Monitor randomization enrollment

Reports and Dashboards
Estimate: 11 minutes
- Share reports
- Run CDMS standard reports
- Tailor reports
- Use dashboards

Reviewing Images
Estimate: 3 minutes
- Understand how to navigate the Imaging module for image review
- Review images for a study

Safety Administration
Estimate: 18 minutes
- Configure Safety Integrations and Form Mapping for your study
- Deploy Safety Integrations
- Run Safety Reports

Snapshots
Estimate: 6 minutes
- Create a snapshot
- View the snapshot results
- Perform bulk actions, like Freezing or Locking, using a snapshot

Course Objectives and Time Estimates

Snapshots - Read Only

Estimate: 3 minutes

- View the results of a snapshot
- View the definition and operation history for a snapshot

Source Data Verification and Data Management Review

Estimate: 6 minutes

- Navigate to studies and sites that require SDV or DMR
- Use Schedule and Item QuickView to filter for actionable items
- Perform SDV or DMR depending on your role

User Management

Estimate: 14 minutes

- Set up the Learning Management System (LMS) connection to Vault CDMS
- Manage user accounts
- Generate user-related reports

Vault CDMS Library

Estimate: 9 minutes

- Understand the role of a Librarian and the purpose of a Library Collections

Vault Owner Overview

Estimate: 6 minutes

- Understand the Vault CDMS interface
- Navigate to the Administrative area
- Add new Vault Owners and manage existing Vault Owner accounts
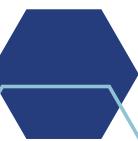
View Data Loader Import History

Estimate: 2 minutes

- View the Data Loader import history

Welcome to CDMS Training

Estimate: 2 minutes

- Understand how to navigate and use the eLearning courses
- Understand how and when you will receive access to your study

Course Objectives and Time Estimates

Clinical Reporting Courses

Listing Builder in Clinical Reporting
Estimate: 7 minutes
- Generate and modify listings using the Listing Builder
- Create and save custom listings

Listing Configuration and Administrative Reporting in Clinical Reporting
Estimate: 6 minutes
- Configure core data listing headers and data defaults
- Generate and download summary and deletion reports

Monitoring Imports and Exporting Data for Clinical Reporting
Estimate: 10 minutes
- Monitor imports in Clinical Reporting
- Define, generate and schedule export packages
- Generate and download export, issue and audit logs

Navigating Clinical Reporting
Estimate: 4 minutes
- Access Clinical Reporting from CDMS
- Navigate studies and listings in Clinical Reporting
- Customize listings and views in Clinical Reporting

Working with Listings in Clinical Reporting
Estimate: 5 minutes
- Explore listing results
- Sort and filter listings
- Generate and download listing CSVs

Course Objectives and Time Estimates

CDB Courses

Automated Data Checks
Estimate: 8 minutes
- Differentiate between Automated and Undefined checks
- Create, edit and delete checks and their associated actions

CDB Administration
Estimate: 5 minutes
- Define user access to listings and sources
- Enable subscriptions for source and export notifications
- Schedule progress reports and download logs

CDB Configurations
Estimate: 6 minutes
- Configure core data listings
- Enable and differentiate between mask blinded data settings
- Set Vault Clone Property

CDB Hands-On Activity
Estimate: 15 minutes
- Complete a data cleaning tasks in a simulated CDB environment
- Demonstrate your skills using CDB Workbench

CDB Listing Builder
Estimate: 6 minutes
- Generate listings using the CDB Listing Builder
- Modify listings created using the Listing Builder

CDB Manifest Builder
Estimate: 9 minutes
- Import files into CDB
- Navigate through the steps of the CDB Manifest Builder

Course Objectives and Time Estimates

CDB Courses

Clean Patient Tracker

Estimate: 4 minutes
- Analyze data available in the Clean Patient Tracker
- Review how patient cleanliness is determined
- Navigate to the Clean Patient Tracker

Clone from Study

Estimate: 4 minutes
- Select objects to be used in the target study
- Review the cloning validation summary

Data Import for Vendors

Estimate: 10 minutes
- Understand the data ingestion process for Veeva CDB
- Upload data via FTP and identify common import errors and warnings
- Manage queries in CDB

Data Ingestion for Data Managers

Estimate: 8 minutes
- Understand the data ingestion process for Veeva CDB
- Navigate CDB Listings and Imports
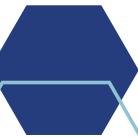- Identify common import errors and warnings

Data Review Workflow

Estimate: 13 minutes
- Sort, filter and analyze review-enabled listings
- Use queries and batch queries to identify discrepant data
- Use the dashboard to examine review listings and queries
- Work with observations in CDB

Deployments

Estimate: 5 minutes
- Access and deploy objects in CDB
- Review the approval workflow and deployment process
- Download and review deployment packages and approval logs

Course Objectives and Time Estimates

CDB Courses

Exports
Estimate: 9 minutes
- Define and generate an export package
- View and download audit, issue and export logs
- Schedule an export

Masking and Conditional Unblinding
Estimate: 4 minutes
- Mask third-party blinded data for users without Restricted permission
- Conditionally unblind data based on certain criteria

Query Workflow
Estimate: 9 minutes
- View, open, respond to and close individual and multiple queries
- Download query listings

Review Listings
Estimate: 12 minutes
- Prepare and enable a listing for review
- Work with review listings and observations in CDB

Veeva CDB Overview
Estimate: 7 minutes
- Understand uses for Veeva CDB in studies
- Navigate through CDB Listings and menus

Working with Listings
Estimate: 9 minutes
- Identify types of listings in CDB
- Access and navigate listings
- Save and download listings