About CDMS Training **25R1**

April 2025

Release Highlights

Available for self-enrollment in Veeva Training

Can be filtered by role

Highlights key features added to Vault CDMS in 25R1

What's New for 25R1

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CDMS Vault Training and VeevaID

Updates for 25R1

New CDB Programmer Curriculum

This curriculum is created for the new **CDB Programmer** standard study role.

> **CDB Programmer**
> **95 - 120 minutes**
>
> **Curriculum Name:**
> **Vault CDMS for CDB Programmers**
>
> **Maps to Standard Study Role:**
> **CDB Programmer**
>
> - Welcome to CDMS Training for CDB Programmers
> - Vault EDC Overview
> - Data Entry in Vault EDC
> - Veeva CDB Overview
> - Working with Listings
> - Review Listings
> - Data Ingestion for Data Managers
> - Automated Data Checks
> - CDB Manifest Builder
> - Clone from Study
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> - Deployments
> - Exports

Course Updates

- **Coder Overview** and **Coding in CDMS** courses now include new Answered Queries column on the Summary page.
- **EDC Tools** features new Export Job History function for easier job export.
- **Imaging** and **Reviewing Imaging** courses now display updated exam viewer interface.
- **Safety Administration** course updated with renamed safety form names and Safety Cases (V4) and Safety Messages (V4) reports.
- **CDB Exports** and **Monitoring Imports and Exporting Data for Clinical Reporting** updated to remove SDTM export type as it is now deprecated, renamed the None export type Custom, and updated issue log layout.
- **Query Workflow** and **Data Review Workflow** details new Query Metrics Dashboard feature.
- Majority of CDB courses show updated user interface including new **Observations** feature. Specifically, **Working with Listings** course details the use of Observations.

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Course Objectives and Time Estimates

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

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Course Objectives and Time Estimates

Coding in CDMS

Estimate: 10 minutes
- Code a code request
- Batch code
- Uncode
- Describe how Autocoding works

Data Entry in Vault EDC

Estimate: 10 minutes
- Create new casebooks
- Enter data into forms and events
- Track progress of data entry at your site

Data Loader

Estimate: 4 minutes
- Import data into EDC using Data Loader
- View the import history

EDC Overview

Estimate: 4 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

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: 23 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

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Course Objectives and Time Estimates

Queries in Vault EDC

Estimate: 7 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: 13 minutes

- Share reports
- Run CDMS standard reports
- Tailor reports
- Use dashboards

Reviewing Images

Estimate: 5 minutes

- Understand how to navigate the Imaging module for image review
- Review images for a study

Safety Administration

Estimate: 20 minutes

- Configure Safety Integrations and Form Mapping for your study
- Deploy Safety Integrations
- Run Safety Reports

Snapshots

Estimate: 7 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: 7 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: 20 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

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Course Objectives and Time Estimates

Clinical Reporting Courses

Listing Builder in Clinical Reporting
Estimate: 6 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

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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: 7 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: 5 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: 5 minutes

- Select objects to be used in the target study
- Review the cloning validation summary

Data Import for Vendors

Estimate: 8 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: 7 minutes

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

Data Review Workflow

Estimate: 9 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

Deployments

Estimate: 6 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: 11 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: 7 minutes
- View, open, respond to and close individual and multiple queries
- Download query listings

Review Listings
Estimate: 7 minutes
- Prepare and enable a listing for review
- Work with review listings 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: 8 minutes
- Identify types of listings in CDB
- Access and navigate listings
- Save and download listings