

Veeva Vault AI

COURSE CONTENT

GET IN TOUCH



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About Multisoft

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About Course

Veeva Vault AI Training provides a structured understanding of how artificial intelligence can complement Veeva Vault content, data, search, and workflow processes. From AI fundamentals and intelligent document processing to integrations, governance, and life sciences use cases, the program helps participants understand both the opportunities and controls involved in applying AI within regulated Vault environments.

Module 1: Veeva Vault and AI Fundamentals

- ✓ Introduction to the Veeva Vault ecosystem
- ✓ Understanding Vault applications and business areas
- ✓ Vault platform architecture overview
- ✓ Documents, data, objects, and metadata
- ✓ Introduction to AI in life sciences
- ✓ AI, machine learning, generative AI, and NLP concepts
- ✓ Role of AI in regulated content environments
- ✓ Opportunities and limitations of enterprise AI

Module 2: Vault Content and Data Foundation for AI

- ✓ Understanding structured and unstructured information
- ✓ Vault document architecture
- ✓ Document types, classifications, and metadata
- ✓ Objects, fields, and relationships
- ✓ Document lifecycle concepts
- ✓ Versioning and controlled content
- ✓ Metadata quality and AI effectiveness
- ✓ Preparing enterprise information for AI-assisted processes
- ✓ Data context and information accessibility

Module 3: AI-Enabled Content Intelligence

- ✓ Introduction to intelligent content processing
- ✓ AI-assisted document understanding

- ✓ Content classification concepts
- ✓ Metadata identification and enrichment
- ✓ Extracting relevant information from documents
- ✓ Identifying content patterns
- ✓ Content summarization concepts
- ✓ Supporting document review activities
- ✓ Human review of AI-generated results
- ✓ Managing exceptions and inaccurate outputs

Module 4: Intelligent Search and Information Discovery

- ✓ Vault search fundamentals
- ✓ Metadata-based information retrieval
- ✓ Full-text and contextual search concepts
- ✓ Natural-language information discovery
- ✓ Understanding user intent in AI-assisted search
- ✓ Finding relevant documents and records
- ✓ Search result relevance
- ✓ Using contextual information to improve discovery
- ✓ Access controls and search visibility
- ✓ Practical information retrieval scenarios

Module 5: Generative AI Concepts within Vault Processes

- ✓ Generative AI fundamentals
- ✓ Large language model concepts
- ✓ Prompt and context fundamentals

- ✓ AI-generated summaries
- ✓ AI-assisted content drafting concepts
- ✓ Content transformation and restructuring
- ✓ Question-and-answer experiences over enterprise information
- ✓ Grounding AI responses in approved information
- ✓ Hallucination and response accuracy considerations
- ✓ Human-in-the-loop review
- ✓ Appropriate versus inappropriate generative AI use cases

Module 6: AI-Assisted Document and Content Lifecycle

- ✓ Content creation and ingestion
- ✓ Document classification
- ✓ Metadata population concepts
- ✓ AI assistance during content review
- ✓ Content comparison and analysis
- ✓ Supporting approval processes
- ✓ Document lifecycle transitions
- ✓ Controlled content distribution
- ✓ Archiving considerations
- ✓ Maintaining traceability across AI-assisted activities

Module 7: AI and Vault Workflow Automation

- ✓ Vault workflow fundamentals
- ✓ Lifecycle and workflow relationships
- ✓ AI-assisted task routing concepts

- ✓ Identifying information for workflow decisions
- ✓ Supporting review and approval activities
- ✓ Notifications and task assistance
- ✓ Exception handling
- ✓ Human approval checkpoints
- ✓ Workflow auditability
- ✓ Combining automation with controlled processes

Module 8: AI Use Cases across Veeva Vault Applications

- ✓ AI opportunities in clinical operations
- ✓ Clinical document and trial content scenarios
- ✓ Regulatory content use cases
- ✓ Quality document and process scenarios
- ✓ Safety information use cases
- ✓ Commercial and medical content scenarios
- ✓ Content review assistance
- ✓ Information extraction and classification
- ✓ Cross-functional knowledge discovery
- ✓ Selecting suitable AI use cases
- ✓ Evaluating business value versus regulatory risk

Module 9: Security, Privacy, and Access Control

- ✓ Vault security fundamentals
- ✓ Users, roles, and permissions
- ✓ Document and object access

- ✓ Protecting confidential life sciences information
- ✓ Data privacy considerations
- ✓ AI access to enterprise information
- ✓ Preventing unauthorized information exposure
- ✓ Segregation of sensitive content
- ✓ Security considerations for AI-generated responses
- ✓ Audit trail awareness
- ✓ Monitoring AI-assisted activities

Module 10: Responsible AI, Governance, and Compliance

- ✓ Responsible AI principles
- ✓ AI governance in life sciences organizations
- ✓ Transparency and explainability considerations
- ✓ Accuracy and reliability
- ✓ Bias and inappropriate output risks
- ✓ Human oversight requirements
- ✓ AI risk classification
- ✓ Governance policies and operating controls
- ✓ Documentation of AI-enabled processes
- ✓ GxP awareness for AI use cases
- ✓ Validation considerations
- ✓ Change control and controlled adoption
- ✓ Maintaining accountability for AI-assisted decisions

Module 11: AI Implementation and Adoption Strategy

- ✓ Identifying AI opportunities in existing Vault processes
- ✓ Use-case prioritization
- ✓ Assessing data and content readiness
- ✓ Stakeholder identification
- ✓ Business and technical requirements
- ✓ Proof-of-concept planning
- ✓ Defining success criteria
- ✓ User acceptance considerations
- ✓ AI output evaluation
- ✓ User training and adoption
- ✓ Change management
- ✓ Production rollout considerations
- ✓ Continuous monitoring and improvement

Module 12: Practical Scenarios and Capstone

- ✓ Designing an AI-assisted Vault use case
- ✓ Selecting appropriate content and metadata
- ✓ Mapping the existing business process
- ✓ Identifying AI intervention points
- ✓ Designing human review checkpoints
- ✓ Defining security and governance requirements
- ✓ AI-assisted document classification scenario
- ✓ Information extraction scenario
- ✓ Intelligent search scenario

- ✓ Content summarization scenario
- ✓ Workflow assistance scenario
- ✓ Evaluating AI-generated output
- ✓ Identifying risks and controls
- ✓ Presenting the proposed Vault AI solution