

External Signatures with DocuSign in Veeva

Agile Integration with fme integration-center



Many business-critical processes in the life sciences and other regulated industries are highly reliant on timely document approvals, involving electronic signatures in a lot of cases. In today's inter-connected business world, the approvers are not limited to signatures within the team or even within the company anymore, but increasingly these processes span across partner and supplier networks as well. Allowing these activities to complete effectively and efficiently can have a major positive impact on project timelines.

A day in the life...

The internal team is collaborating on documents within the business application, such as Veeva. Once the documents are ready for approval they are sent to the internal approvers, who can easily approve and apply their electronic signature directly within the application – so far so good. But what about a scenario where the approvers are external to the company? Involving external approvers and signatories into internal processes can be challenging. Some commonly encountered scenarios include:

- Sponsor approvals for CRO Documents
- Customer approval of Specifications, Certificate of Analysis, Master Manufacturing Records for a contract manufacturer
- Partner signatures for project plans and reports
- Trainee signature for an in-person training event where attendees are not users within the LMS

The options are to onboard these external contacts into the business application – which will require license and training investments, even though most of the functionalities are not required for these contacts.

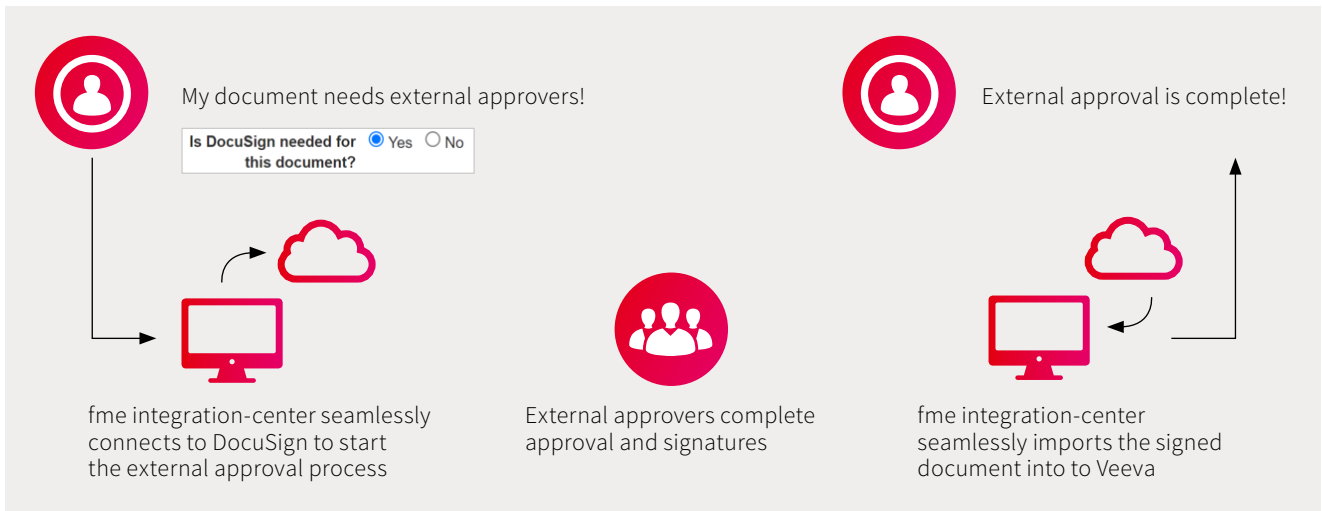
Or – in a lot of cases – the manual route is taken. Documents are exported locally, sent via email to the external contact(s) and the business users wait for the response. Once the

signed document is received, it will be uploaded and stored according to the business process requirements. But how do you make sure the latest copy was sent and signed? How do you control what the recipient does with the attachment? What if the email ends up with the wrong recipient? How do you handle multiple signatures for a document? And how do you track pending signatures?

Using an integrated approach

Leveraging technologies like DocuSign is one option to support the use cases outlined above. However, connecting these technologies between your existing systems and maintaining compliance with Part 11 and Annex 11 can be challenging. fme's integration-center framework allows robust and flexible connections between systems in your enterprise landscape with support for compliance and continuous improvement.

What does that mean for our use case? The business user will have the ability to send the document to a DocuSign workflow within the Veeva application. As part of this process the user will provide the contact information for the external users required to sign off. The integration-center framework connects to DocuSign, uploading the document content and initiating the DocuSign processing. DocuSign



takes over at this point, sending the notification to the provided participants, while within the Veeva application it will be visible that the process was started. Meanwhile, the external contacts will follow the necessary steps in DocuSign to apply their approval and signature. Once the DocuSign process is completed by all participants, the signed document will be brought back into the Veeva application. The status of the workflow will be updated, which will inform the initiator who can then pick up the work and trigger any follow-up steps in the document process.

There are no manual steps outside of the application required!

Take advantage of the benefits

- Accuracy – no disruption between the business application and the content shared externally
- Efficiency – no need for manual steps to share the documents for external approvals
- Traceability – Veeva workflow is showing the completion status within DocuSign
- Compliance – maintaining 21 CFR Part 11 requirements
- Security – documents are fully encrypted and protected within the DocuSign application

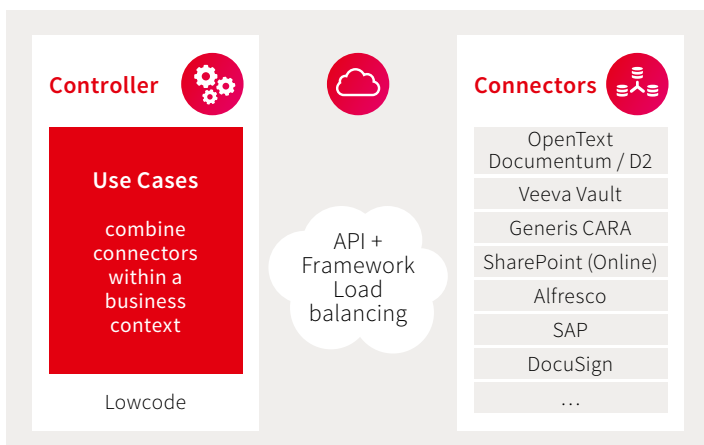
Built on future-proof technology

Our integration-center connectors for leading business applications such as Veeva, which are implemented as cloud-ready Micro-Services, provide core functionality to read and write data and content and to access and trigger additional processes in these applications as needed. A low code platform provides the ability to realize the actual business use cases by providing business logic while combining the connectors within the business context (controller).

Our end-to-end implementation approach

Implementing integrations within the enterprise landscape is a key component of fme's standard end-to-end implementation approach – from early Business Consulting, through Analysis and Design, Implementation, Testing (specifically Test Plan creation and execution) and Rollout support.

To implement specific project needs such as the DocuSign integration more efficiently, a set of accelerators are leveraged that provide a proven baseline. These include configurations and supporting documentation to quickly deploy the integration elements. The enablement of any necessary additional configurations in support of the specific use cases, or any frontend changes and trigger points, are performed by our team of technicians who are trained and certified in the leading business platforms such as Veeva Vault.



Get closer to one connected landscape

Tell us your business needs and our team of experts will be happy to help you identify and define how integrations such as Veeva and DocuSign can help you with your path forward – to get closer to one connected landscape!