



## Administrator Guide

# CorrIT<sup>2</sup>

SPORIFY



**Version:** 23.1

**Export Date:** 05/24/2023

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 Get certified by completing our SPORIFY Users Training course which is available via the [CorrIT Training Academy](#)<sup>1</sup>. Contact your local SPORIFY administrator for more information.

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<sup>1</sup> <https://academy.corrit.ie/#/login>

# 1 General Information

## 1.1 System Overview

The features of the system include:

## 1.2 Functions

- Provide system and user administration to tenants.
- Match preformatted Excel or CSV lists to SPOR Master Data Management Services and G-SRS controlled substance lists.
- Provide the ability to create and set a Resolution Status to each term on your uploaded list.
- Provide the ability to create and apply Data Tags to your Source or Target Data.
- Export each list you have uploaded along with the set Resolution Status and any associated Mapping Data from RMS, OMS or G-SRS, as applicable to your list.
- Provide an overview of your activity and Mapping Status via chart-based reports. These reports are known inside SPORIFY as Dashboard, Overview and Data Insight pages.
- Provide an overview of the information available in SPOR RMS & OMS and G-SRS services.
- Provide notifications to highlight when SPOR information is updated.

*Note: Features available are dependent on the subscription plan you have licensed. Not all features are available for all subscription plans.*

### 1.2.1 Browser Compatibility Settings

#### General Settings

- SPORIFY makes use of modern web technology. To experience the system at its best we recommend a modern web browser listed below:

Browser	Supported Version
Chrome	Latest
Firefox	Latest
Edge	Latest
Internet Explorer	11.70 +

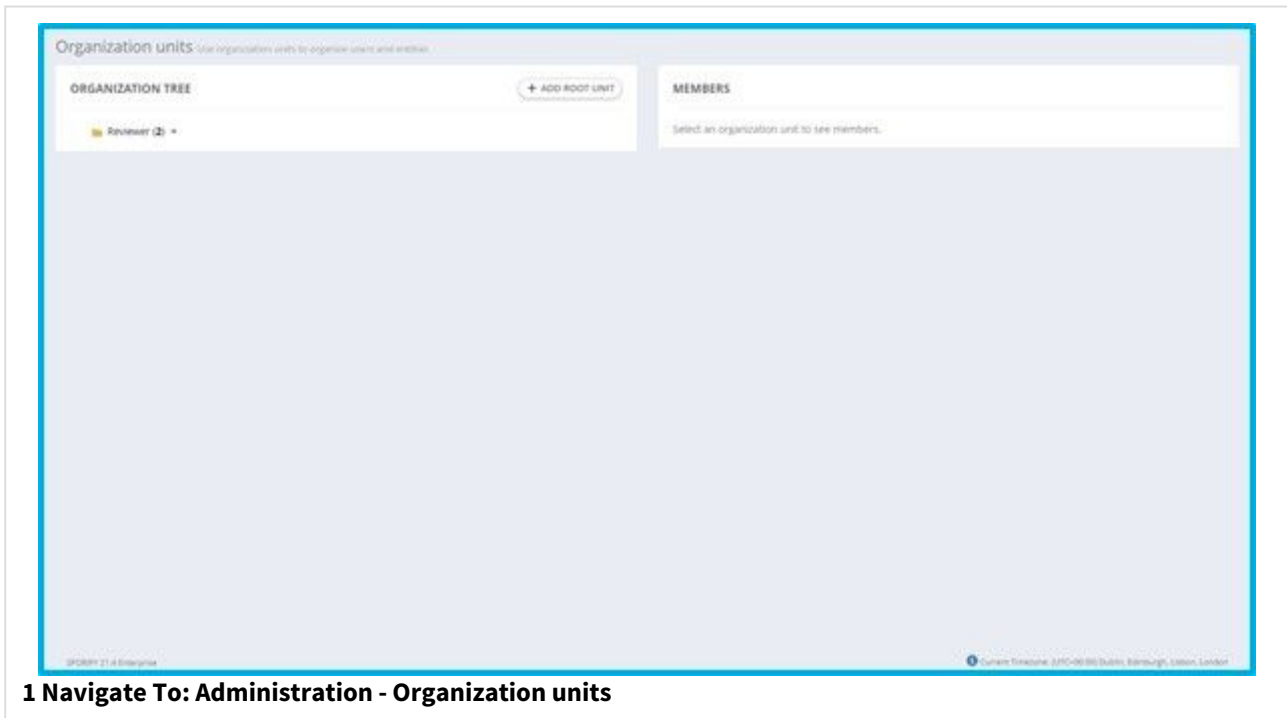
- The system has been tested successfully in Internet Explorer 11.70. However, it is not recommended to run the system in older versions of Internet Explorer due to possible compatibility issues with the angular framework technology used by the system.

## 1.3 Administration Guide

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### 1.4 Organization units

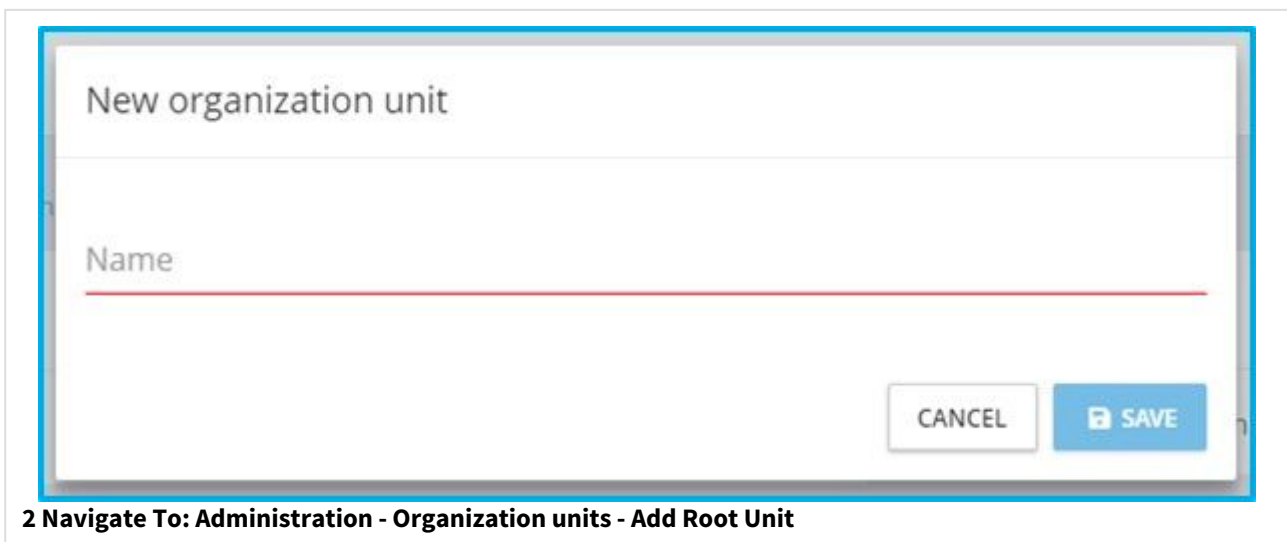
---



**1 Navigate To: Administration - Organization units**

Available Actions:

- Add root unit



**2 Navigate To: Administration - Organization units - Add Root Unit**

- Edit



The screenshot shows a web form titled "Edit: Reviewer". It features a single text input field labeled "Name" containing the text "Reviewer". At the bottom right of the form, there are two buttons: a white "CANCEL" button and a blue "SAVE" button with a lock icon.

**3 Navigate To: Administration - Organization units - Select Organization Tree - Edit**

- Add sub unit

The screenshot shows a web form titled "New organization unit". It features a single text input field labeled "Name" which is currently empty. At the bottom right of the form, there are two buttons: a white "CANCEL" button and a blue "SAVE" button with a lock icon.

**4 Navigate To: Administration - Organization units - Select Organization Tree - Add sub unit**

- Add member

Select a user

Search...

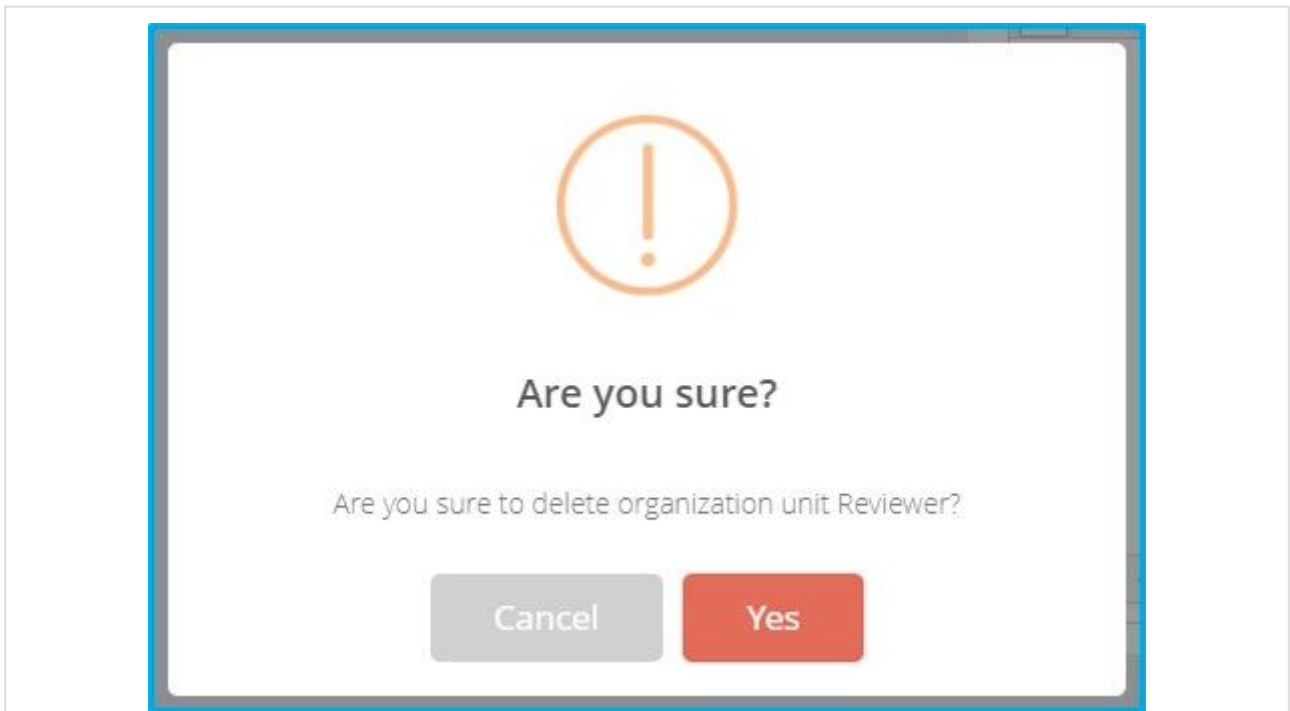
Select	Name
✓ SELECT	admin admin (gary.wilson2@gmail.com)
✓ SELECT	Alison Traynor (alison.traynor@corrit.ie)
✓ SELECT	Andreas Bassermann (andreas.bassermann@corrit.ie)
✓ SELECT	pipeline pipeline (pipeline@corrit.ie)

1 / 1 50 items per page 1 - 4 of 4 items

CANCEL

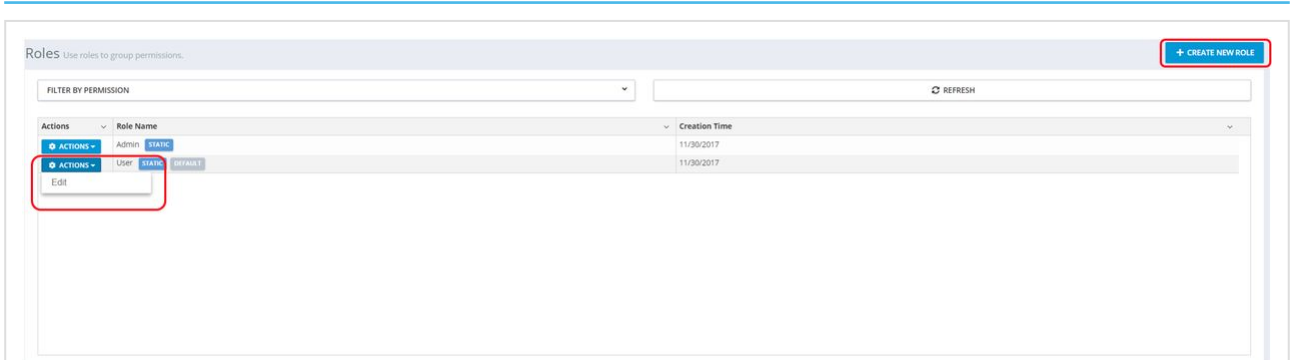
**5 Navigate To: Administration - Organization units - Select Organization Tree - Add member**

- Delete



**6 Navigate To: Administration - Organization units - Select Organization Tree - Delete**

## 1.5 Roles



**7 Navigate To: Administration - Roles**

### Available Actions:

- Create New Role
  - Role properties:
    - Role name
    - On/Off: Assign new users by default
  - Permissions

### Create new role

---

Role properties    Permissions

---

Role name

---

Default  
Assign to new users as default.

**8 Navigate To: Roles - Create New Role**

- Edit
  - Edit role properties:
    - Edit role name
    - On/Off: Assign new users by default
  - Permissions

### Edit role: User

Role properties    Permissions

---

Role name  
User

---

Default  
Assign to new users as default.

**9 Navigate To: Roles - Actions - Edit Role**

Assigning Permissions to a Role:

Select permissions from the tree view and save them to apply them to the created role.

### Create new role

Role properties    **Permissions**

- Pages
  - Access Control
  - Administration
  - Dashboard
  - Organisations
  - Referentials
  - Substances

**10 Navigate To: Roles - Create New Role - Permissions Tab**

## 1.6 Users

Users Manage users and permissions.

Search...

Show advanced filters

Actions	User Name	Name	Surname	Roles	Email Address	Email Confirm	Active	Last Login Time	Creation Time
<b>ACTIONS</b> Edit Permissions Unlock Delete	admin	Admin	User	Admin	email@corr.it	YES	YES	05/31/2018	04/23/2017
	testaccount	test	test	User	office@corr.it	NO	YES	-	01/05/2018

50 items per page    1 of 4 items

**11 Navigate To: Administration - Users**

### Available Actions:


- Create new user
- Edit user
- Assign roles
- Assign permissions
- Unlock
- Delete
- Login as this user

*Note: This feature is helpful when troubleshooting user queries or working on another user's behalf. All actions carried out while an administrator is logged into another managed user account are clearly labelled in the audit log: "This operation is performed by another user on behalf of this user."*

### 1.6.1 Create New User

#### Create new user

User informations   Roles **1**



Name \_\_\_\_\_

Surname \_\_\_\_\_

Email address \_\_\_\_\_

Phone number \_\_\_\_\_

User name \_\_\_\_\_

- Set random password.
- Should change password on next login.
- Send activation email.
- Active
- Is lockout enabled ?

**12 Navigate To: Administration - Users - Create New User**

**Available Settings:**

- Name
- Surname
- Email address
- Phone number



- Username
- Profile picture
- Security Settings:
  - a. Set random password
  - b. Should change password on next login
  - c. Send activation email
  - d. Account status (active)
  - e. Is lockout enabled?
- Assign Roles:
  - a. Select from available roles


### Edit New User

#### Edit user: admin

---

User informations   Roles **1**

---



Name  
joe

Surname  
Bloggs

Email address  
joe.bloggs@spotify.eu

Phone number

User name  
admin

Set random password.

Password

Password (repeat)

Should change password on next login.

Send activation email.

Active

Is lockout enabled ?

**13 Navigate To: Administration - Users - Actions Button - Edit**

**Available Settings:**

- Name
- Surname
- Email address
- Phone number
- Username
- Profile picture
- Security Settings:
  - a. Set random password
  - b. Set new password
  - c. Should change password on next login
  - d. Send activation email
  - e. Account status (active)
  - f. Is lockout enabled?
- Assign Roles:
  - a. Select from available roles

**Assign Permissions**

Users can be assigned permissions outside of their provided roles if required.

*Note: For a more efficient way to administer user permissions, please review the Roles section of this document. Roles allow permissions to be applied to users in groups to ease the administration overhead.*

The screenshot displays a hierarchical tree view of permissions. The root node is 'Pages', which is expanded to show several sub-nodes: 'Access Control', 'Administration', 'Dashboard', 'Organisations', 'Referentials', and 'Substances'. Each of these sub-nodes is further expanded to show its own set of sub-items. For example, 'Administration' includes 'Audit logs', 'Languages', 'Organization units', 'Resolution Status', 'Roles', 'Settings', 'Source Systems', 'Tags', and 'Users'. 'Organisations' includes 'Assign Tags', 'Manage Data Insights', 'Source Data', and 'Target Organisations'. 'Referentials' includes 'Assign Tags', 'Source Data', 'Target Referentials', and 'Translations'. 'Substances' includes 'Assign Tags', 'Source Data', and 'Target Substances'. Each item in the tree has a checkbox to its left, indicating its selection status. Additionally, each item has a small icon to its left that can be toggled between a minus sign (collapsed) and a plus sign (expanded). At the bottom of the interface, there are three buttons: 'RESET SPECIAL PERMISSIONS' (a light blue button), 'CANCEL' (a light blue button), and 'SAVE' (a dark blue button with a white save icon).

**14 Navigate To: Administration - Users - Actions Button - Permissions**

### Available Top-Level Permissions:

- Pages: Root level, required for SPORIFY Access
- Access Control: Controls visibility of user data to other users within your tenant (RMS, OMS and SMS lists uploaded by this user will be shared with all users, but if disabled user data is private to their account)
- Administration: Provides administration features to the user
- Organisations: Permissions in the SPORIFY Organisations area
- Referentials: Permissions in the SPORIFY Referentials area
- Substances: Permissions in the SPORIFY Substances area
- Dashboard: SPORIFY main dashboard and navigation bar

## 1.7 Audit Logs

**15 Navigate To: Administration - Audit Logs**

### Description

- Audit Logs can be filtered based on available criteria.
- Audit logs can be exported to Excel.
- Audit Logs show an error state:
  - a. Success
  - b. Has Error
- Information about each entry can be found by clicking the detail button on the left of the table.
- SPORIFY support staff may request a copy of the Audit Logs when troubleshooting.

## 1.8 Change logs

**Change logs**

Date Range: 08/28/2022 - 09/26/2022  
 User: ANDREAS.BASSERMANN@CORRIT.IE  
 Action: ALL  
 Entity Type: ALL

Entity Id:   
 Field Name: ALL  
 From Value:   
 To Value:

**CLEAR** **EXPORT TO EXCEL** **REFRESH**

Timestamp	User Name	Full Name	Action	Entity Type	Entity Id	Field Name	From Value	To Value	Event Desc
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000328	TermId		100000000328	TermId i ^
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000328	TermName		Ascension Island	TermNa
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000328	IsDeleted		0	IsDelete
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000328	StatusId		Not Set (0)	Statusid
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000324	TermId		100000000324	TermId i
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000324	TermName		Antigua and Barbuda	TermNa
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000324	IsDeleted		0	IsDelete
2022-09-23 11:30:33	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000324	StatusId		Not Set (0)	Statusid
2022-09-23 11:30:32	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000323	TermId		100000000323	TermId i
2022-09-23 11:30:32	andreas.basserma...	Andreas Bassermann	INSERT	SourceTerm	100000000323	TermName		Antarctica	TermNa ^

1 / 22 / 22 items per page 1 - 50 of 1089 items

**16 Navigate To: Administration - Change logs**

**Available Actions:**

- Search
- Filter
  - Date Range
  - From Value
  - To Value
  - Username
  - Action
  - Entity Type
  - Entity ID
  - Field Name
- Export to Excel
- Refresh

**1.9 Authentication logs**

---

**17 Navigate to Administration - Authentication logs**

**Available Actions:**

- Search
- Filter
  - Date Range
  - From Value
  - Result
  - User Name
  - Browser
  - IP Address
- Export to Excel
- Refresh

## 1.10 Settings

### 1.10.1 General

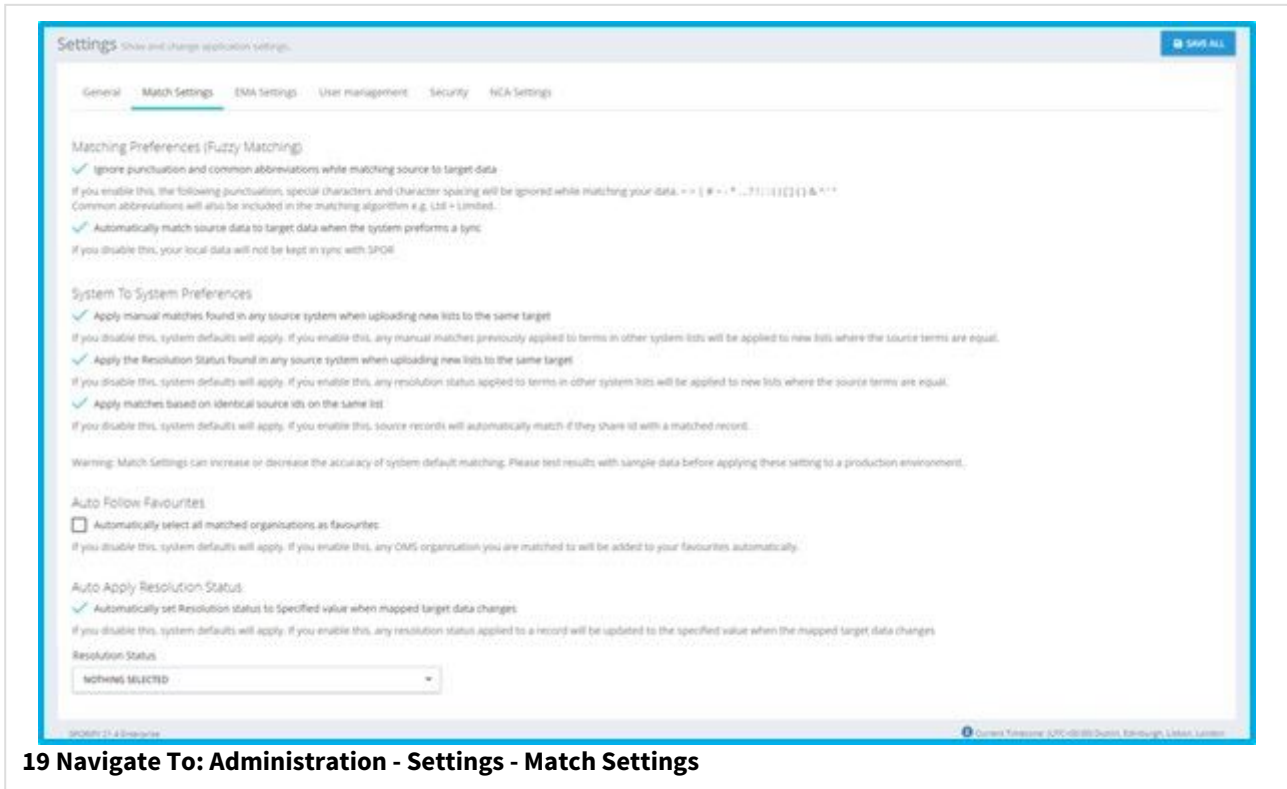
**18 Navigate To: Administration - Settings - General**

**Available Settings:**

Timezone:

- Choose your required timezone from the drop-down menu.

## 1.10.2 Match Settings



19 Navigate To: Administration - Settings - Match Settings

### Available Settings:

#### Matching Preferences (Fuzzy Matching):

- On/Off: Ignore punctuation and common abbreviations while matching source to Target data.
  - If you enable this, the following punctuation, special characters and character spacing will be ignored while matching your data: < > | # ~ - \* . , ? ! ; : ( ) [ ] { } & ^ ' ''
  - SPORIFY will also include common abbreviations in the matching algorithm, e.g. Ltd = Limited.
- On/Off: Automatically match Source Data to Target Data when the system performs a sync.
  - If you disable this, your local data will not be kept in sync with SPOR.

#### System To System Preferences:

- On/Off: Apply manual matches found in any source system when uploading new lists to the same target.
  - If you disable this, system defaults will apply. If you enable this, any manual matches previously applied to terms in other system lists will be applied to new lists where the source terms are equal.
- On/Off: Apply the Resolution Status found in any source system when uploading new lists to the same target.
  - If you disable this, system defaults will apply. If you enable this, any Resolution Status applied to terms in other system lists will be applied to new lists where the source terms are equal.
- On/Off: Apply matches based on identical source IDs on the same list.
  - If you disable this, system defaults will apply. If you enable this, source records will automatically match if they share Id with a matched record.

*Warning: Match Settings can increase or decrease the accuracy of system default matching. Please test results with sample data before applying these settings to a production environment.*

Auto Follow Favourites:

- On/Off: If you disable this, system defaults will apply. If you enable this, any OMS organisation you are matched to will be added to your favourites automatically.

### 1.10.3 EMA Settings

The screenshot shows the 'EMA Settings' page within a 'Settings' application. The page title is 'Settings Show and change application settings.' and there is a 'SAVE ALL' button in the top right. The navigation tabs are 'General', 'Match Settings', 'EMA Settings' (selected), 'User management', 'Security', and 'NCA Settings'. The main content area is titled 'EMA Credentials' and contains two input fields: 'EMA User Name' and 'EMA Password'. Below these fields are three buttons: 'SAVE', 'TEST', and 'CLEAR'.

**20 Navigate To: Administration - Settings - EMA Settings**

#### Available Settings:

- EMA Credentials (User Name and Password)
  - Credentials are required for EMA SPOR API access on behalf of your organisation.
  - One EMA credential is required per tenant account.
  - Enter credentials and click Test to confirm that the account has API access.
  - To remove your EMA credentials from SPORIFY, select Clear and Save.

### 1.10.4 User Management

The screenshot shows the 'User Management' page within a 'Settings' application. The page title is 'Settings Show and change application settings.' and there is a 'SAVE ALL' button in the top right. The navigation tabs are 'General', 'Match Settings', 'EMA Settings', 'User management' (selected), 'Security', and 'NCA Settings'. The main content area is titled 'Form Based Registration' and contains several settings: 'Allow users to register to the system.' (checked), 'New registered users are active by default.' (unchecked), and 'Use security image question (captcha) on registration.' (checked). Below this is the 'Other Settings' section with 'Email confirmation required for login.' (checked).

**21 Navigate To: Administration - Settings - User Management**

#### Available Settings:

##### Form Based Registration

- On/Off: Allow users to register to the system.
  - If disabled, users can only be created by a tenant admin account using the user management page.
- On/Off: Set auto-activate preference.



- If you disable this, new users will not be active (and cannot login) until admin manually activate the account.
- On/Off: Require Captcha security question.
- On/Off: Email confirmation required for login of new users.

### 1.10.5 Security

The screenshot shows the 'Settings' page with the 'Security' tab selected. The settings are as follows:

- Password complexity:**
  - Use default settings
  - Minimum password length: 6
  - Maximum password length: 12
  - Use numbers in password
  - Use upper case letters in password
  - Use lower case letters in password
  - Use punctuations in password
- User Lock Out:**
  - Enable user account locking on failed login attempts
  - Maximum number of failed login attempt count before locking the account: 5
  - Account is locked out until administrator unlocks it
- Two Factor Login:**
  - Enable two factor user login.
  - Users will receive an authentication code to their registered email address
- IP Whitelisting:**
  - Add trusted IP addresses or IP ranges from which your users can access your tenant account.

**22 Navigate To: Administration - Settings - Security**

#### Available Settings:

##### Password complexity

- On/Off: Use default settings.
  - a. If Off is selected, on-screen default settings will be applied.
- Set minimum password length.
- Set maximum password length.
- Complexity requirements:
  - a. On/Off: Use numbers in password.
  - b. On/Off: Use upper case letters in password.
  - c. On/Off: Use lower case letters in password.
  - d. On/Off: Use punctuation marks in password.

##### Enforce Password History

- On/Off: Limit Password Reuse.
  - Set maximum number of unique passwords before an old password can be reused.

##### Password Expiration

- On/Off: Enable Password Expiration.
  - Set maximum number of days before users have to renew password.

### User Lock Out

- On/Off: Enable user lockout after failed login attempts.
  - Set maximum number of failed attempts before locking the account.
- On/Off: Account is locked until administrator unlocks it.

### Two Factor Login

- On/Off: Enable two factor user login.
  - Users will receive an authentication code to their registered email address.
- On/Off: Allow to remember browser.
  - If you allow this, users can select to remember the browser so that they do not have to do the two factor login twice on the same browser.

### IP Whitelisting

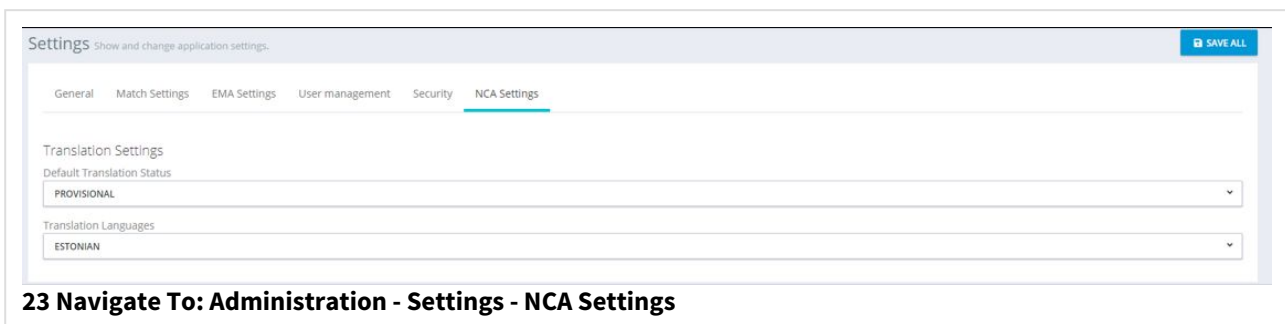
- Add trusted IP addresses or IP ranges from which your users can access your tenant account.
  - Add one entry per line in the format x.x.x.x for a single address or x.x.x.x/y for a range of addresses.

### Session Idle Timeout

- On/Off: Automatically Log Out User After A Set Period Of Inactivity.
  - Set maximum number of seconds before logging out the user.

## 1.10.6 NCA Settings

*Note: NCA Settings are only available with the NCA edition of SPORIFY.*



The screenshot shows the 'Settings' page with a navigation bar at the top containing 'General', 'Match Settings', 'EMA Settings', 'User management', 'Security', and 'NCA Settings'. The 'NCA Settings' tab is selected. Below the navigation bar, there are two sections: 'Translation Settings' and 'Translation Languages'. Under 'Translation Settings', there is a dropdown menu for 'Default Translation Status' with 'PROVISIONAL' selected. Under 'Translation Languages', there is a dropdown menu with 'ESTONIAN' selected. A 'SAVE ALL' button is visible in the top right corner of the settings area.

**23 Navigate To: Administration - Settings - NCA Settings**

### Available Settings:

#### Translation Settings

- Default translation status
  - Choose appropriate status from the drop-down menu.
- Translation Languages
  - Choose appropriate language from the drop-down menu.

## 1.10.7 External Login Settings

With External Login Settings, it's possible to include user accounts hosted on an external identity provider. SPORIFY supports OpenID Connect 1.0 with [Okta](#)<sup>2</sup>, [Microsoft Azure AD](#)<sup>3</sup>, [OneLogin](#)<sup>4</sup>, and [ForgeRock](#)<sup>5</sup> as identity provider.

The screenshot shows the 'Settings' page for 'External Login Settings'. The 'Openid with Okta' option is selected with a radio button. Below the selection, there are input fields for 'Okta Configuration Credentials', 'Authority', 'Client Id', 'Client Secret', and 'RedirectUri'. The 'RedirectUri' field contains the value 'https://demo.sporify.eu/authorization-code/callback'. A 'SAVE ALL' button is visible in the top right corner.

**24 Navigate To: Administration - Settings - External Login Settings - Openid with Okta**

The screenshot shows the 'Settings' page for 'External Login Settings'. The 'Openid with Azure Active Directory' option is selected with a radio button. Below the selection, there are input fields for 'Azure Active Directory Configuration Credentials', 'Authority', 'Client Id', and 'Client Secret'. A 'SAVE ALL' button is visible in the top right corner.

**25 Navigate To: Administration - Settings - External Login Settings - Openid with Azure Active Directory**

<sup>2</sup> <https://www.okta.com/>

<sup>3</sup> <https://azure.microsoft.com/en-us/products/active-directory/>

<sup>4</sup> <https://www.onelogin.com/>

<sup>5</sup> <https://www.forgerock.com/>

The screenshot shows the 'Settings' page with the 'External Login Settings' tab selected. A blue 'SAVE ALL' button is in the top right. The 'External Login Settings' section is active, showing a notification that settings take up to 24 hours to take effect. Under 'OpenId with', 'OpenId with OneLogin' is selected with a checkmark. Below this, there are three text input fields: 'Authority', 'Client Id', and 'Client Secret', all of which are currently empty.

**26 Navigate To: Administration - Settings - External Login Settings - OpenId with OneLogin**

The screenshot shows the 'Settings' page with the 'External Login Settings' tab selected. A blue 'SAVE ALL' button is in the top right. The 'External Login Settings' section is active, showing a notification that settings take up to 24 hours to take effect. Under 'OpenId with', 'OpenId with ForgeRock' is selected with a checkmark. Below this, there are four text input fields: 'Authority', 'Client Id', 'Client Secret', and 'RedirectUri'. The 'RedirectUri' field contains the text 'https://demo.sporify.eu/account/externalLoginCallback'.

**27 Navigate To: Administration - Settings - External Login Settings - OpenId with ForgeRock**

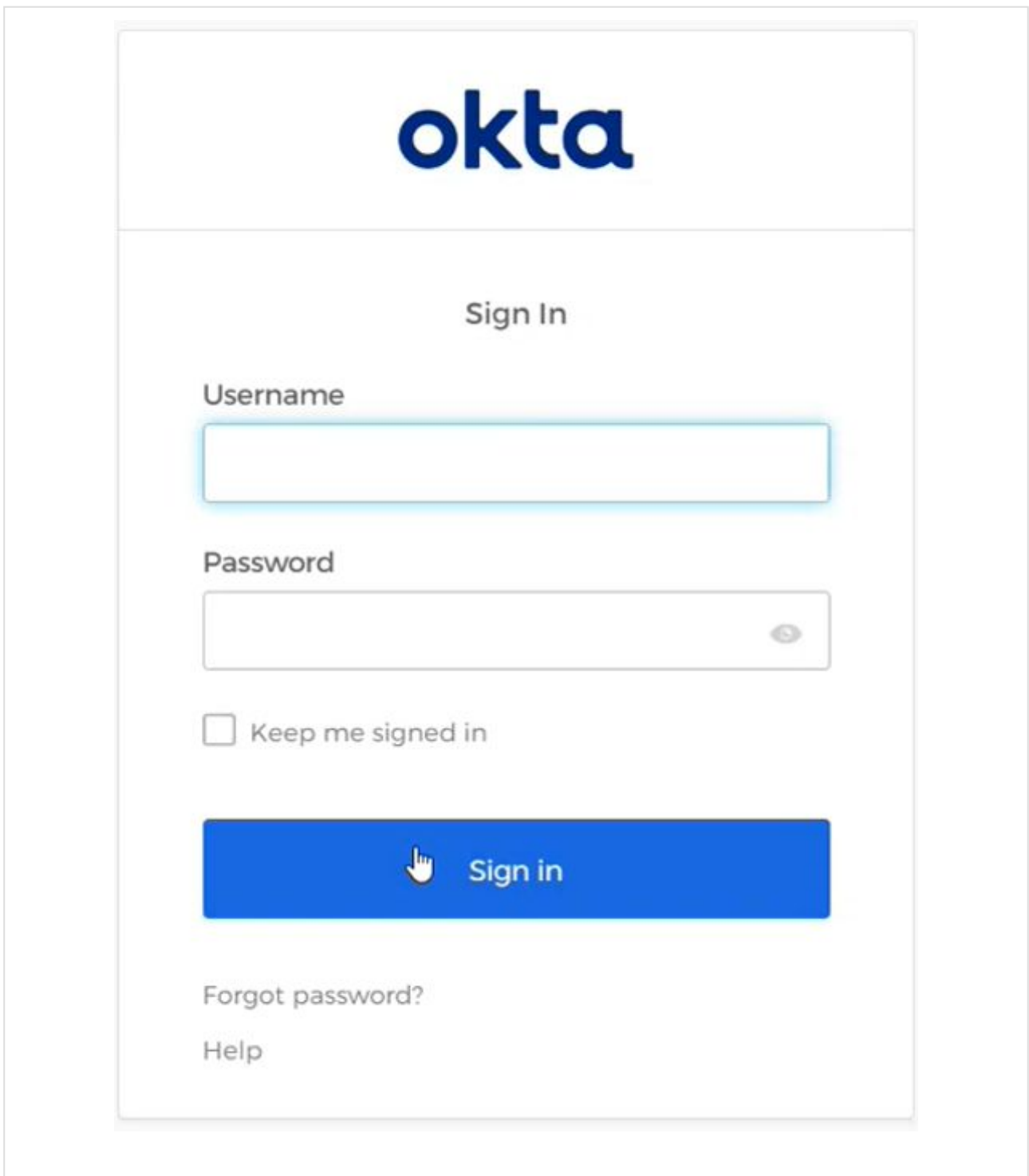
**Available Settings:**

- OpenID with Okta
  - Authority
  - Client ID
  - Client Secret
  - Redirect URL
- OpenID with Azure Active Directory
  - Authority
  - Client ID
  - Client Secret
- OpenID with OneLogin
  - Authority
  - Client ID
  - Client Secret
- OpenID with ForgeRock
  - Authority

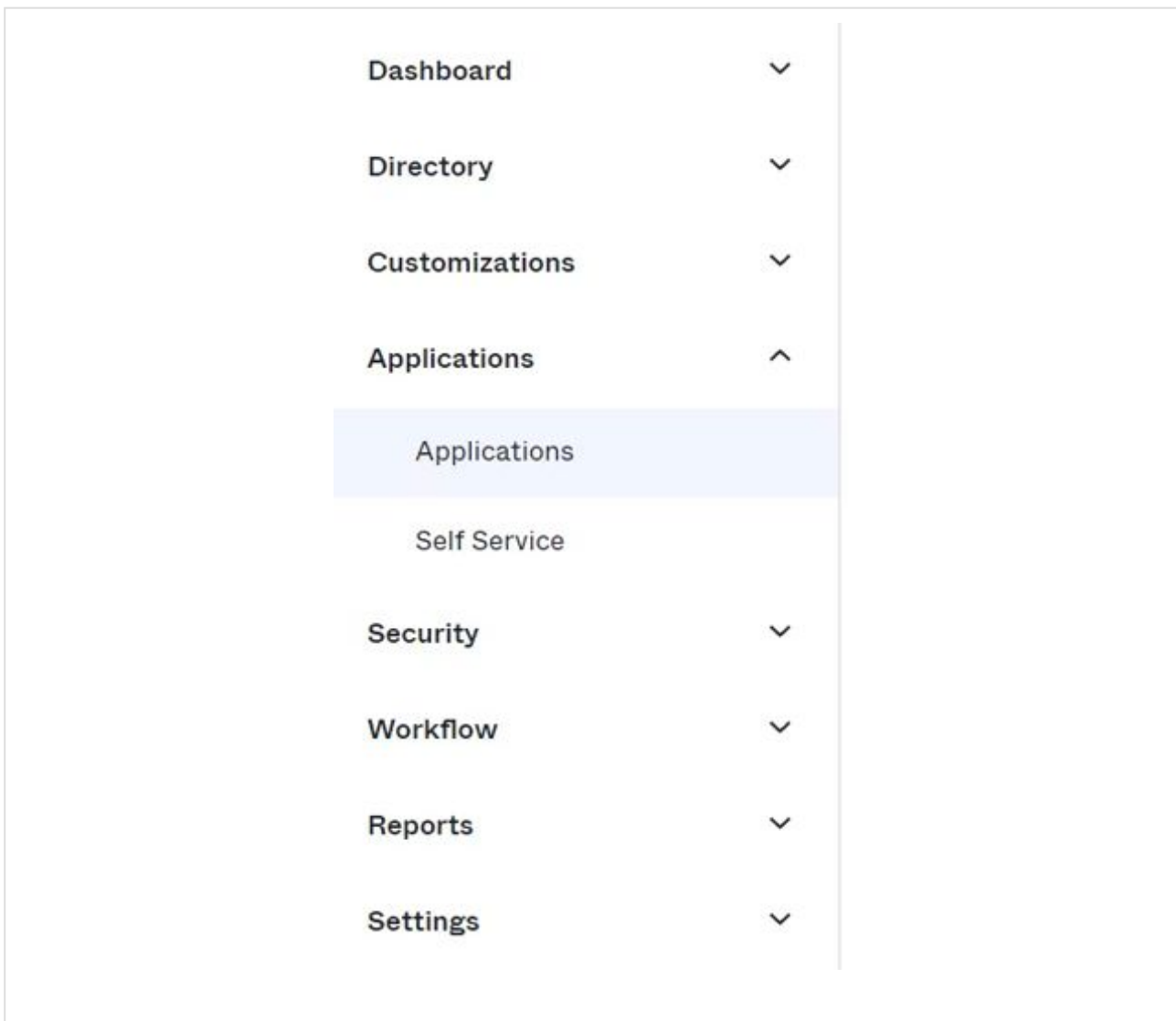
- Client ID
- Client Secret
- Redirect URL

#### 1.10.7.1 Obtaining OpenID With Okta Credentials:

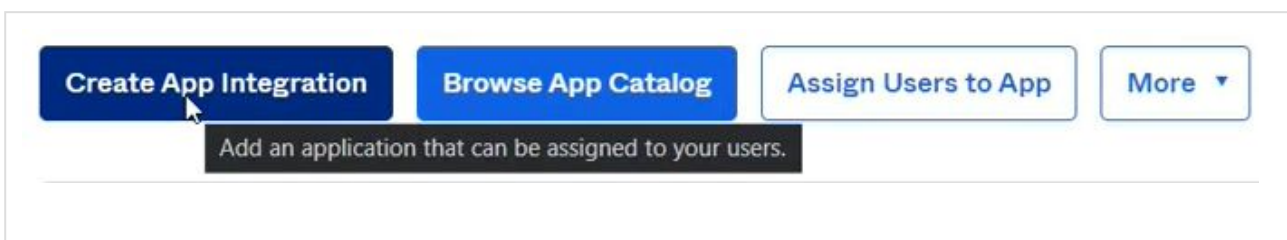
- Login to Okta.



- Select Applications on the navigation menu.
- Select Applications.



- Click the Create App Integration button.



- Select the following options:
  - Sign-in method
    - OIDC - OpenID Connect
  - Application type
    - Web Application
- Click the Next button.

## Create a new app integration ✕

**Sign-in method**

[Learn More](#)

- OIDC - OpenID Connect**  
Token-based OAuth 2.0 authentication for Single Sign-On (SSO) through API endpoints. Recommended if you intend to build a custom app integration with the Okta Sign-In Widget.
- SAML 2.0**  
XML-based open standard for SSO. Use if the Identity Provider for your application only supports SAML.
- SWA - Secure Web Authentication**  
Okta-specific SSO method. Use if your application doesn't support OIDC or SAML.
- API Services**  
Interact with Okta APIs using the scoped OAuth 2.0 access tokens for machine-to-machine authentication.

---

**Application type**

What kind of application are you trying to integrate with Okta?

Specifying an application type customizes your experience and provides the best configuration, SDK, and sample recommendations.

- Web Application**  
Server-side applications where authentication and tokens are handled on the server (for example, Go, Java, ASP.Net, Node.js, PHP)
- Single-Page Application**  
Single-page web applications that run in the browser where the client receives tokens (for example, Javascript, Angular, React, Vue)
- Native Application**  
Desktop or mobile applications that run natively on a device and redirect

- Complete the following fields:
  - General Settings
    - App integration name
    - Grant type
      - Select Authorization Code and Implicit (hybrid)



### New Web App Integration

**General Settings**

App integration name:

Logo (Optional):

Grant type: [Learn More](#)

Client acting on behalf of itself:  
 Client Credentials

Client acting on behalf of a user:  
 Authorization Code  
 Interaction Code  
 Refresh Token  
 Implicit (hybrid)

- Sign-in redirect URIs
  - Insert URI.
    - For production, use <https://spotify.eu/authorization-code/callback><sup>6</sup>
    - For validation, use <https://v.spotify.eu/authorization-code/callback><sup>7</sup>
    - Note that no port number is needed for this URI

**Sign-in redirect URIs**

Allow wildcard \* in sign-in URI redirect.

Okta sends the authentication response and ID token for the user's sign-in request to these URIs

[Learn More](#)

- Sign-out redirect URIs
  - Insert URI.
    - For production, use <https://spotify.eu/logout><sup>8</sup>
    - For validation, use <https://v.spotify.eu/logout><sup>10</sup>

6 <https://demo.spotify.eu/authorization-code/callback>  
7 <https://demo.spotify.eu/authorization-code/callback>  
8 <https://demo.spotify.eu/authorization-code/callback>  
9 <https://demo.spotify.eu/logout>  
10 <https://demo.spotify.eu/authorization-code/callback>  
11 <https://demo.spotify.eu/logout>

**Sign-out redirect URIs** (Optional)

After your application contacts Okta to close the user session, Okta redirects the user to one of these URIs.

[Learn More](#)

✕  
+ Add URI

- Assignments
  - Controlled access
    - Select the relevant option.
  - Enable immediate access
    - Check the 'Enable immediate access with Federation Broker Mode' checkbox.
- Click the Save button.

**Assignments**

**Controlled access**

Select whether to assign the app integration to everyone in your org, only selected group(s), or skip assignment until after app creation.

Allow everyone in your organization to access

Limit access to selected groups

Skip group assignment for now

**Enable immediate access** (Recommended)

Recommended if you want to grant access to everyone without pre-assigning your app to users and use Okta only for authentication.

Enable immediate access with **Federation Broker Mode**

**i** To ensure optimal app performance at scale, Okta End User Dashboard and provisioning features are disabled. Learn more about [Federation Broker Mode](#).

**Save** Cancel

- View the information provided about the created app, including Client ID and Client Secret.

### Client Credentials Edit

Client ID  Copy  
Public identifier for the client that is required for all OAuth flows.

Client authentication  Client secret  Public key / Private key

Proof Key for Code Exchange (PKCE)  Require PKCE as additional verification

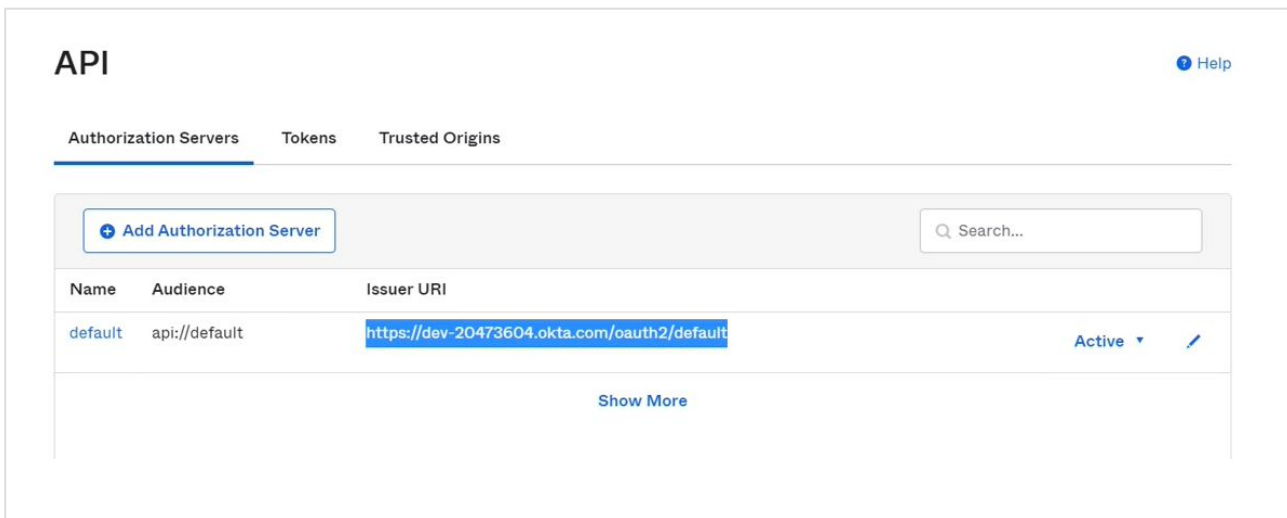
---

### CLIENT SECRETS

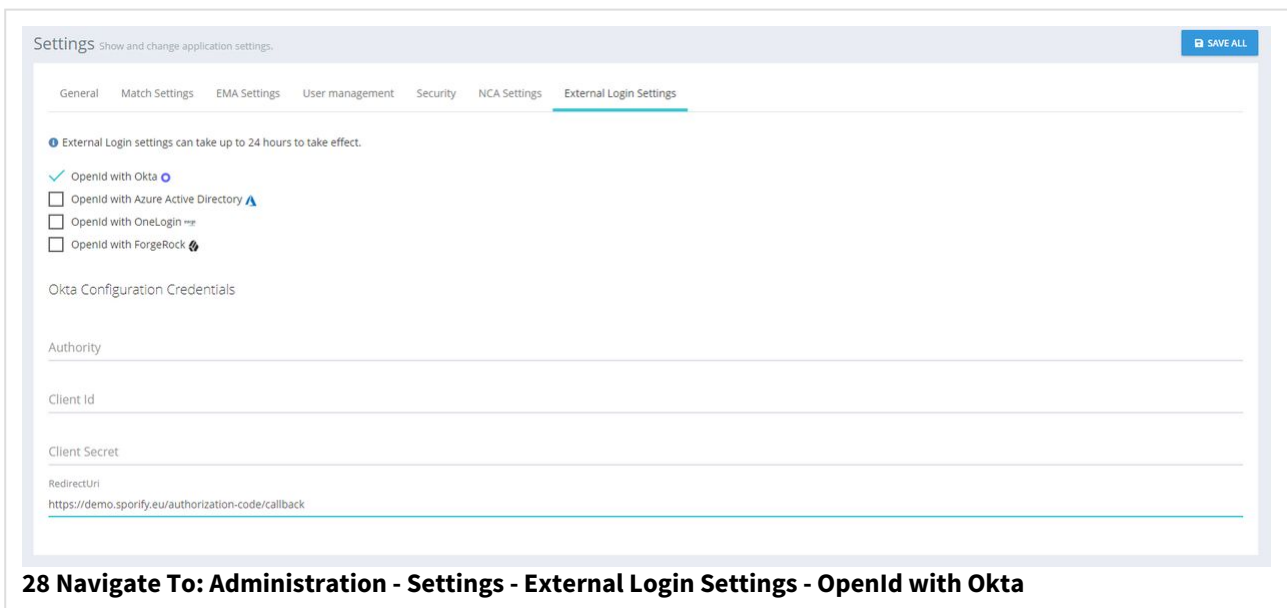
Generate new secret

Creation date	Secret	Status
Oct 10, 2022	..... <span>Copy</span>	Active <span>▼</span>

- Select Security on the navigation menu.
- View the relevant Issuer URI, which is the required Authority code.



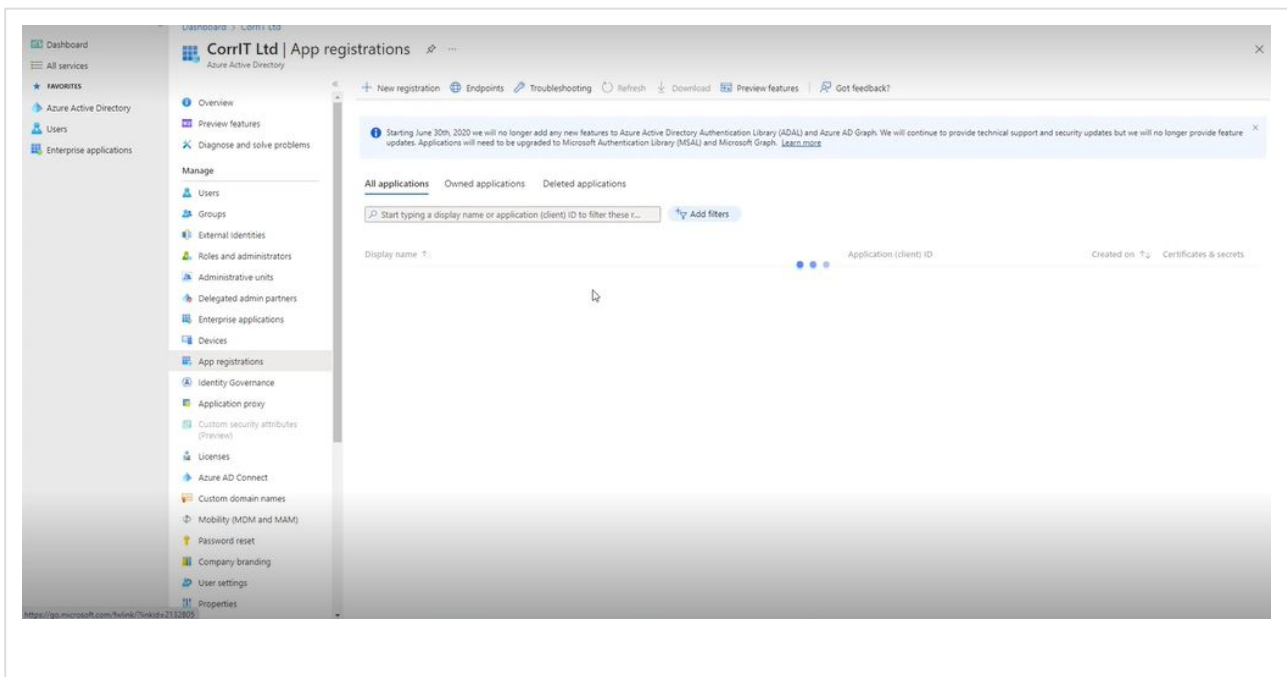
- Once the credentials have been obtained:
  - Login to SPORIFY.
  - Click Administration on the navigation menu.
  - Click Settings.
  - Select External Login Settings.
  - Check the OpenID with Okta checkbox.
  - Complete the presented fields.
  - Click Save All.



**28 Navigate To: Administration - Settings - External Login Settings - Openid with Okta**

### 1.10.7.2 Obtaining OpenID With Azure Active Directory Credentials:

- Login to aad.portal.azure.com.
- Select Azure Active Directory.
- Select App Registrations on the navigation menu.
- Click New Registration.



- Name the application using the Name field.

**\* Name**  
The user-facing display name for this application (this can be changed later).

- Select the supported account type 'Accounts in any organizational directory (Any Azure ID directory - Multitenant)'.

**Select your Supported account types (in our case we want all options):**

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (eXaaS only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Personal Microsoft accounts only

- Under Redirect URI, select Web using the first field.
- Set the redirect URI to <https://spotify.eu/account/externalLoginCallback> for production or <https://v.spotify.eu/account/externalLoginCallback><sup>12</sup> for validation.

<sup>12</sup> <https://spotify.eu/account/externalLoginCallback>

**Redirect URI (optional)**

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

- Click Register.
- Under Essentials, click on the Redirect URIS link.

Redirect URIs : [0 web, 1 spa, 0 public client](#)

- Under Single-Page Application, enter <https://spotify.eu> in the first field for production or <https://v.spotify.eu><sup>13</sup> for validation.
- Enter <https://spotify.eu/account/login> in the second field for production or <https://v.spotify.eu/account/login><sup>14</sup> for validation.

Single-page application

Redirect URIs

The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating or signing out users. The redirect URI you send in the request to the login server should match one listed here. Also referred to as reply URIs. Learn more about Redirect URIs and their restrictions.

Add URI

Grant types

Your Redirect URI is eligible for the Authorization Code Flow with PKCE.

- Under Front Channel Logout URL, add the following URL: <https://spotify.eu/logout><sup>15</sup>.

**Front-channel logout URL**

This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.

- Under Implicit Grant And Hybrid Flows, select 'ID tokens (used for implicit and hybrid flows)'.

<sup>13</sup> <https://spotify.eu/account/externalLoginCallback>

<sup>14</sup> <https://spotify.eu/account/login>

<sup>15</sup> <https://demo.spotify.eu/logout>

### Implicit grant and hybrid flows

Request a token directly from the authorization endpoint. If the application has a single-page architecture (SPA) and doesn't use the authorization code flow, or if it invokes a web API via JavaScript, select both access tokens and ID tokens. For ASP.NET Core web apps and other web apps that use hybrid authentication, select only ID tokens. [Learn more about tokens.](#)

Select the tokens you would like to be issued by the authorization endpoint:

- Access tokens (used for implicit flows)
- ID tokens (used for implicit and hybrid flows)

- Click Save.
- Navigate to Certificates & Secrets.
- Click New Client Secret.
- Provide a description in the Description field.
- Set an expiry date using the Expires field.

Description	<input type="text" value="AspNetZero Demo Client Secret"/>
Expires	<input type="text" value="Recommended: 6 months"/>

- View the Client Secret that has been created.

Description	Expires	Value	Secret ID
AspNetZero Demo Client Secret	11/10/2022	[REDACTED]	[REDACTED]

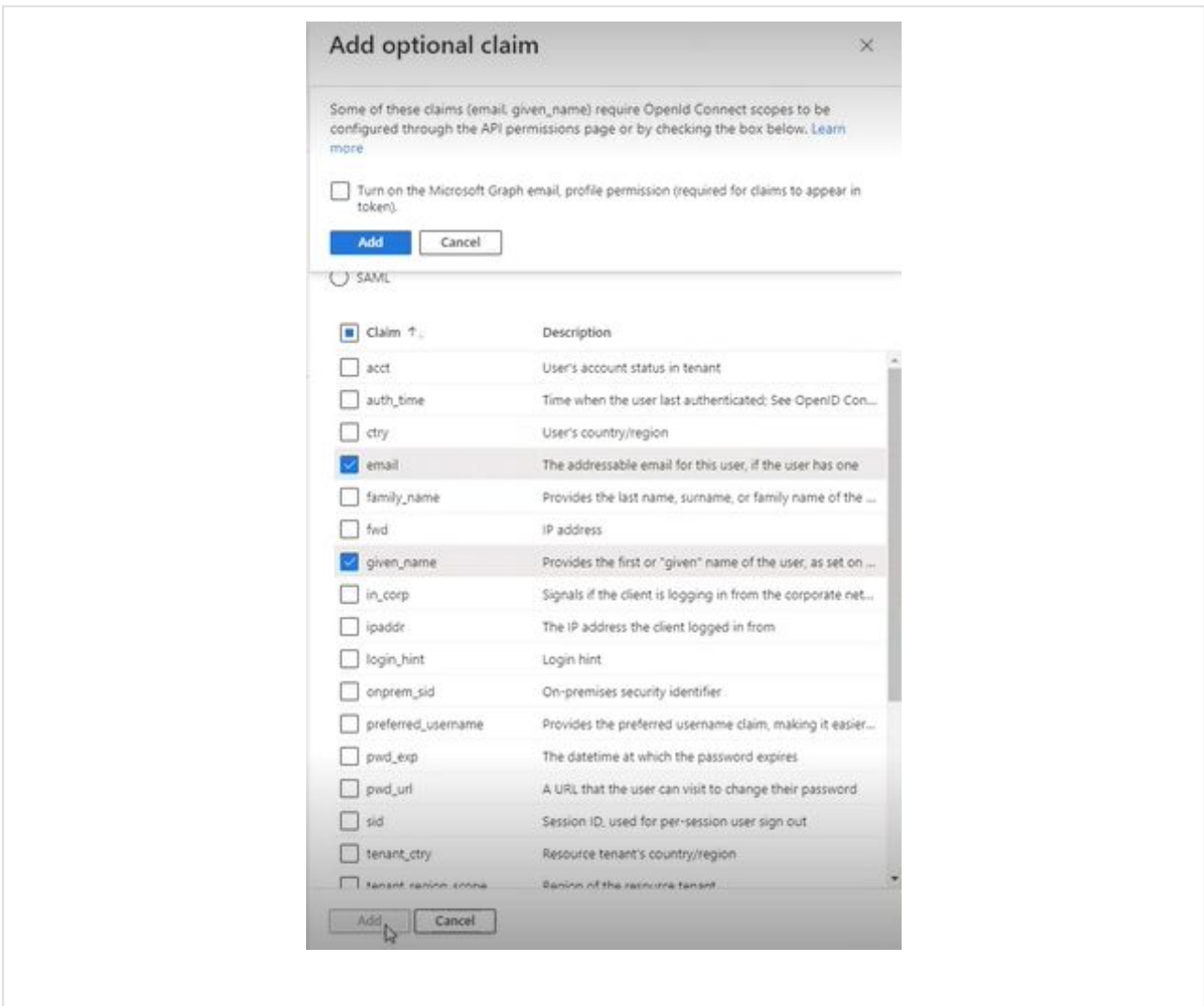
- Copy and save the Secret ID.
- Navigate to the Overview tab to view and copy the Client ID.

Essentials

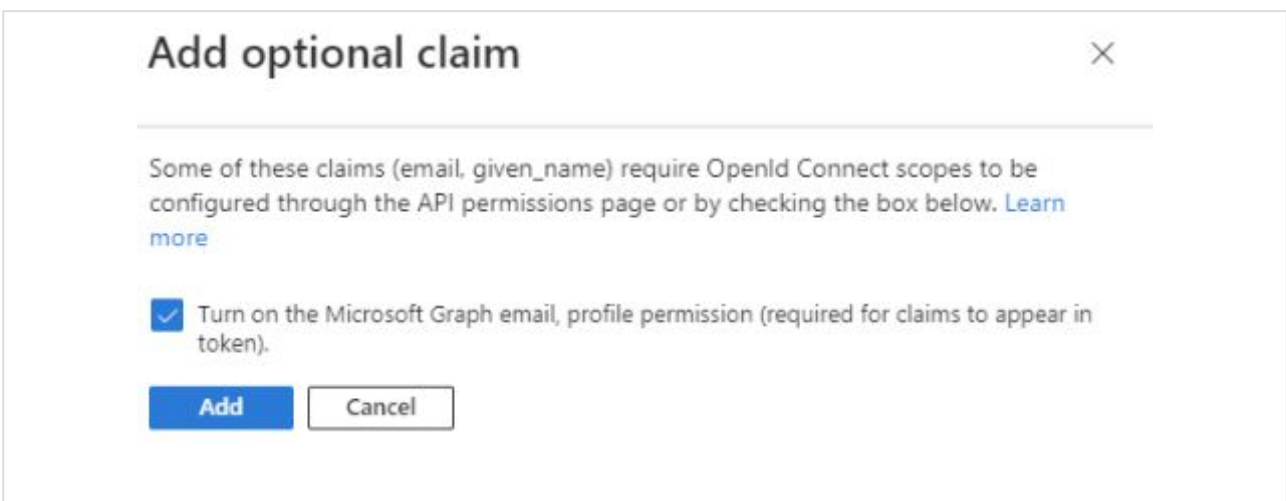
Display name	: <a href="#">AspNetZero Demo</a>	Client credentials	: <a href="#">0.certificate_1.secret</a>
Application (client) ID	: [REDACTED]	Redirect URIs	: <a href="#">2.web_0.spa_0.public.client</a>
Object ID	: [REDACTED]	Application ID URI	: <a href="#">Add an Application ID URI</a>
Directory (tenant) ID	: [REDACTED]	Managed application in L...	: <a href="#">AspNetZero Demo</a>

Supported account types : [All Microsoft account users](#)

- Select Token Configuration on the navigation menu.
- Click Add Optional Claim.
- Under Token Type, select ID.
- Select the following claims: email and given\_name.
- Click Add.



- Check the 'Turn on the Microsoft Graph email, profile permission...' checkbox.
- Click Add.



- Click Add Optional Claim again.



- Under Token Type, select Access.
- Check email and given\_name.
- Click Add.
- Once the credentials have been obtained:
  - Login to SPORIFY.
  - Click Administration on the navigation menu.
  - Click Settings.
  - Select External Login Settings.
  - Check the OpenID with Azure Active Directory checkbox.
  - Complete the presented fields.
  - Click Save All.

Settings Show and change application settings. SAVE ALL

General Match Settings EMA Settings User management Security NCA Settings External Login Settings

External Login settings can take up to 24 hours to take effect.

- Openid with Okta
- Openid with Azure Active Directory
- Openid with OneLogin
- Openid with ForgeRock

Azure Active Directory Configuration Credentials

Authority

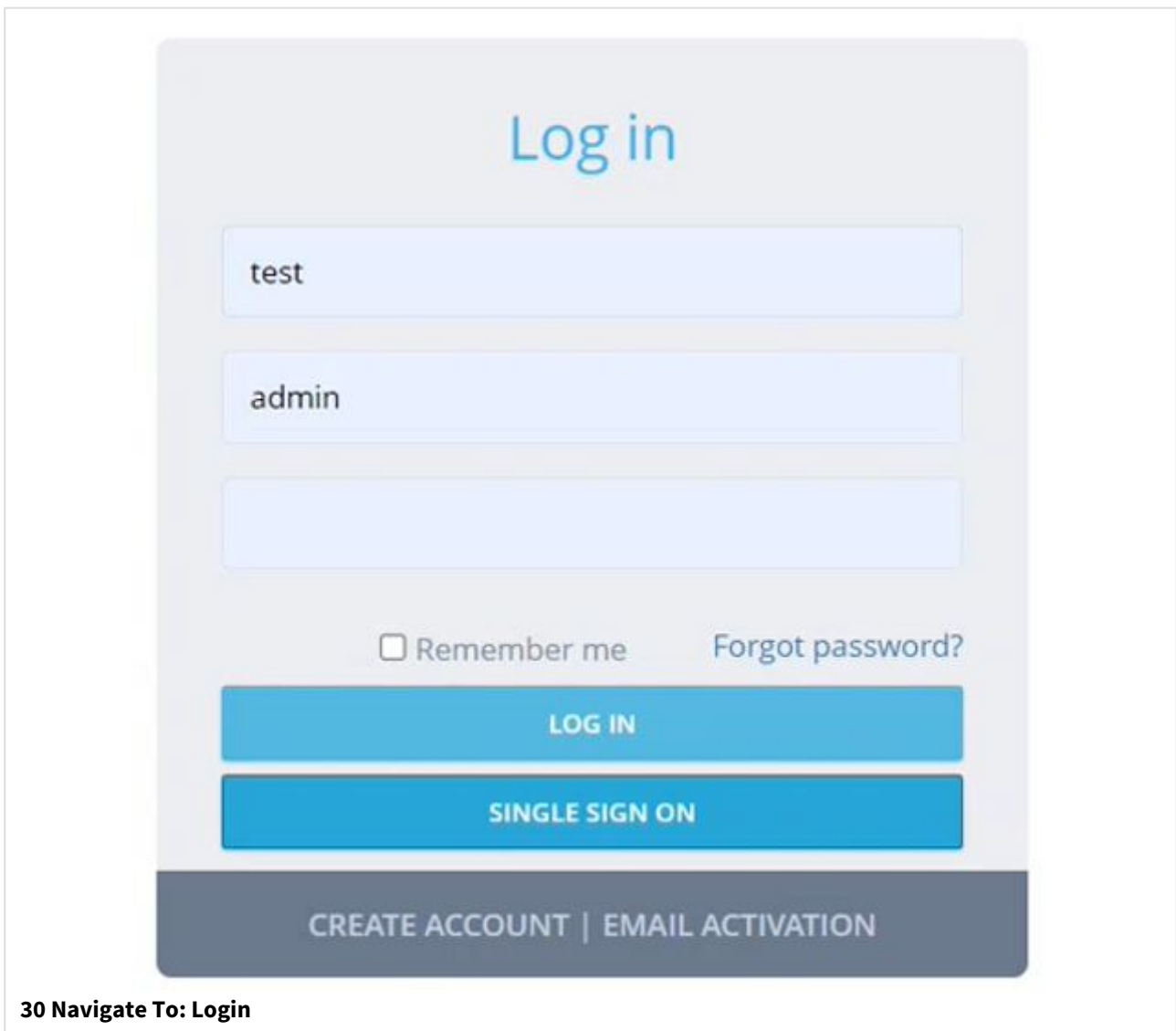
Client Id

Client Secret

**29 Navigate To: Administration - Settings - External Login Settings - OpenId with Azure Active Directory**

### 1.10.7.3 Logging In To SPORIFY Using SSO:

- Insert the relevant credentials.
- Click the Single Sign On button.
  - The user is redirected to Okta/Azure/OneLogin.



**30 Navigate To: Login**

- Login via Okta/Azure/OneLogin.
  - If the user has already signed up, they are redirected to SPORIFY.
  - If the user has not already signed up, they are redirected to the SPORIFY Sign Up screen.
- To sign up, fill in the following fields:
  - Tenant
  - First name
  - Surname
  - Email
- Click the Submit button.
  - A confirmation email is sent to the user. Via this email, the user is required to confirm their email address.
  - The user must then wait for their account to be activated by system admin.

Sign up

Tenant

Personal information

BACK SUBMIT

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## 1.11 Manage Systems

Manage Systems

+ CREATE NEW SYSTEM

Name
Default

31 Navigate To: Administration - Manage Systems

### Available Settings:

- Create New System
  - Name system

## Create New System

Name

CANCEL

 SAVE

### 32 Navigate To: Administration - Manage Systems - Create New System

- Edit System
  - Edit system name

## Edit System

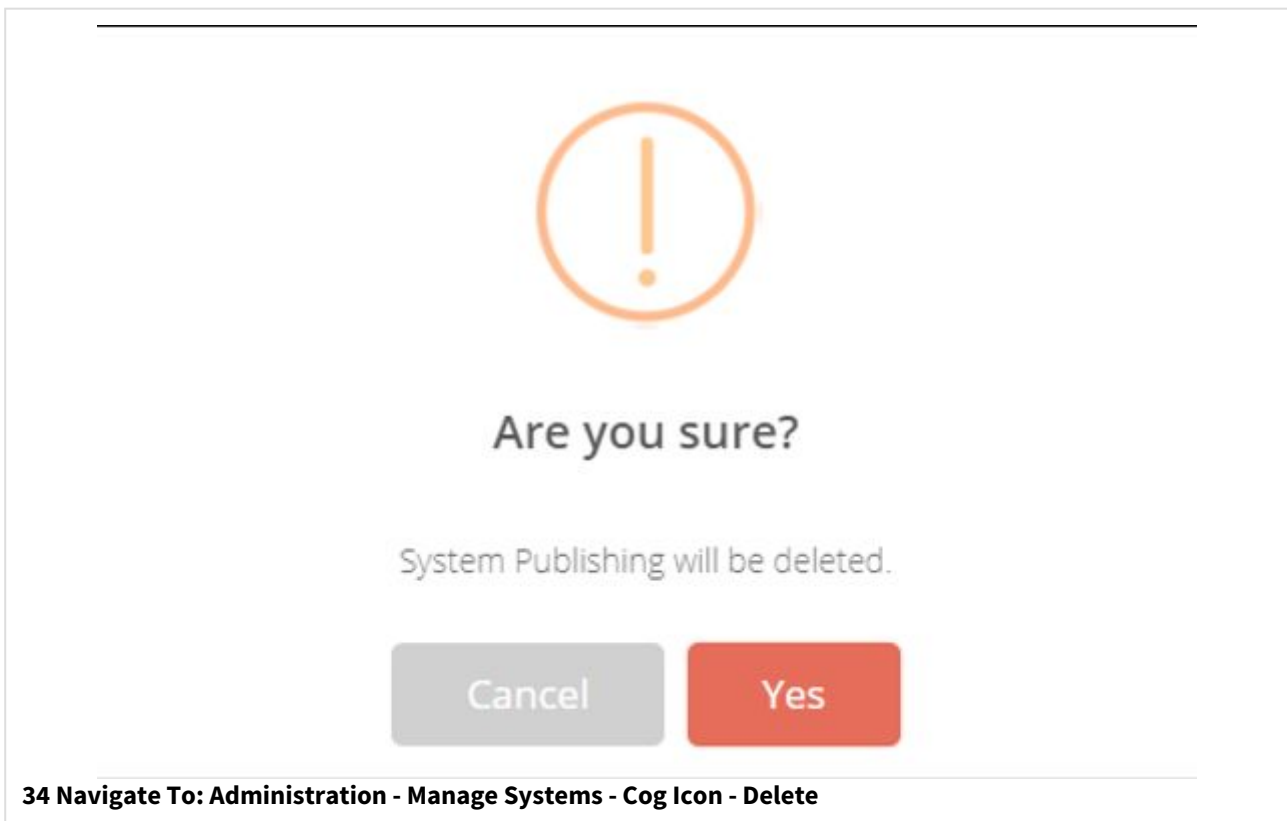
Name

CANCEL

 SAVE

### 33 Navigate To: Administration - Manage Systems - Cog Icon - Edit

- Delete System
  - Confirm the deletion action by clicking Yes



**34 Navigate To: Administration - Manage Systems - Cog Icon - Delete**

*Note: Deleting a Resolution Status will revert the status of all records in the system that the deleted Resolution Status was applied to back to their default status set by SPORIFY after matching, e.g. "Matched", "Not Set" or "Suggested" as applicable.*

## 1.12 Tags



**35 Navigate To: Administration - Tags**

**Available Settings:**

- Create new Tag
  - Name

Create new tag

Name

Name must be Unique

CANCEL SAVE

**36 Navigate to: Administration - Tags- Create New Tag**

- Edit Tag
  - Name

Edit tag

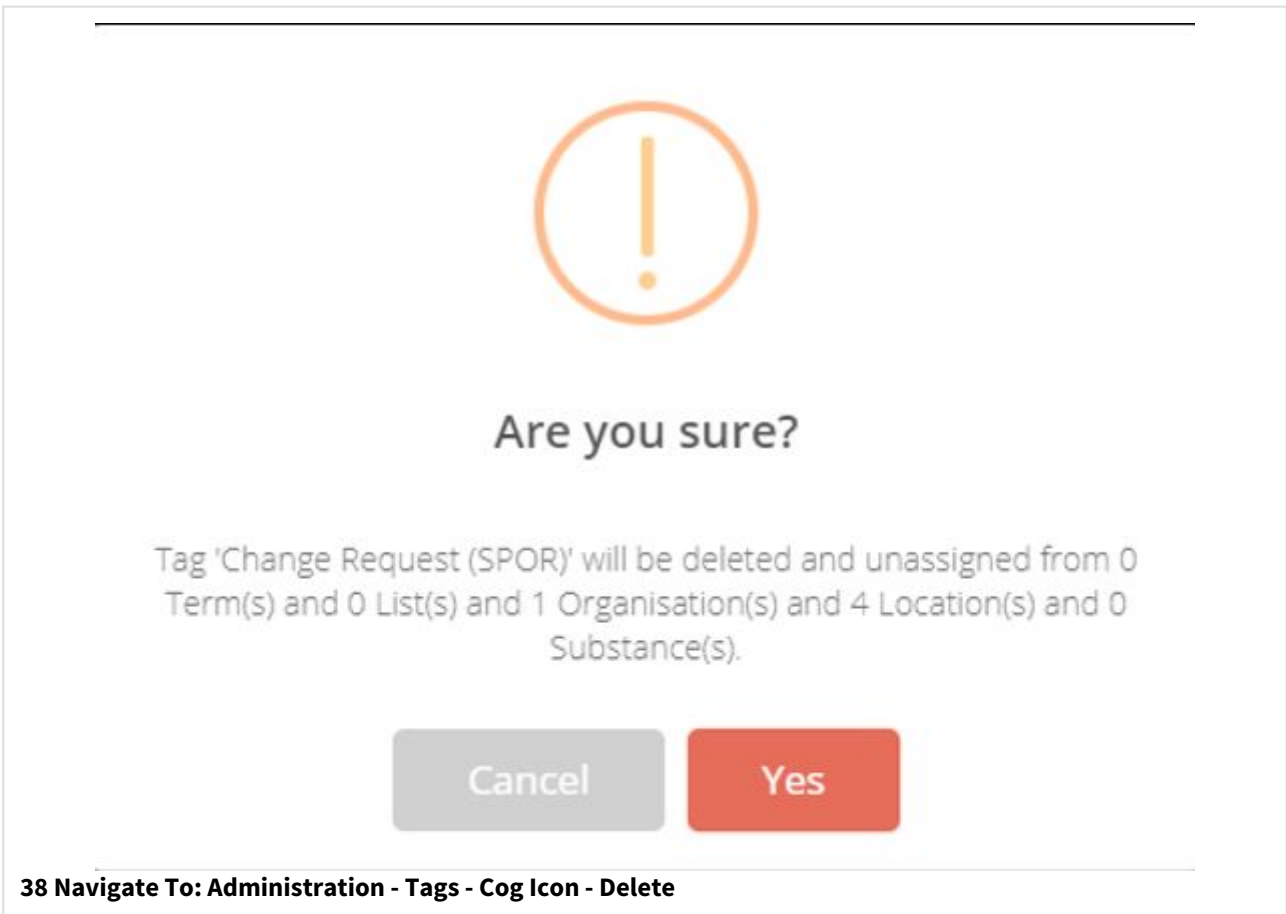
Name

Approved

CANCEL SAVE

**37 Navigate To: Administration - Tags - Cog Icon - Edit**

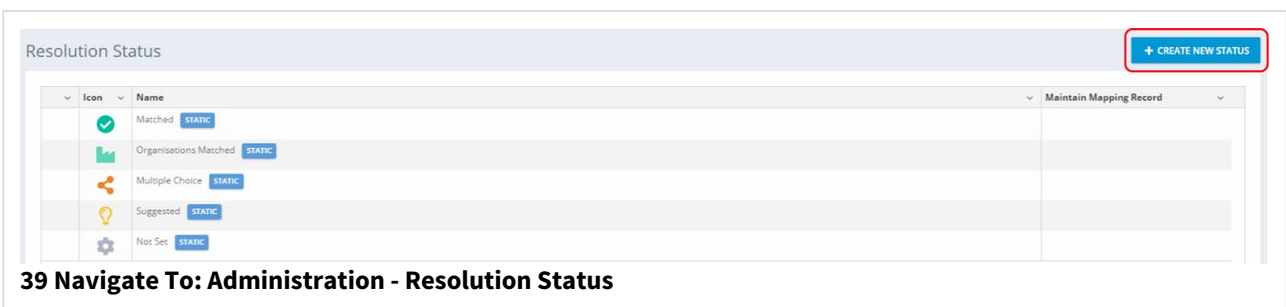
- Delete Tag
  - Confirm the deletion action by clicking Yes.



**38 Navigate To: Administration - Tags - Cog Icon - Delete**

*Note: Deleting a Tag will remove the Tag from any data that it has been associated with. The system will ask if you are sure you wish to proceed with the delete action. A summary of the number of records the Tag will be removed from will be displayed for your information. You must confirm if you wish to proceed or cancel.*

## 1.13 Resolution Status



**39 Navigate To: Administration - Resolution Status**

**Available Settings:**

- Create Status
  - Name
  - Colour
  - Icon

- On/Off: Maintain mapping record
- Edit
- Delete

### Create New Status

---

Name

Color

Icon

Maintain mapping record

**40 Navigate To: Administration - Resolution Status - Create New Status**

*Note: Deleting a Resolution Status will revert the status of all records in the system that the deleted Resolution Status was applied to back to their default status set by SPORIFY after matching, e.g. "Matched", "Not Set" or "Suggested" as applicable.*

## 1.14 Change Reasons

Change Reasons are utilised as part of e-signature which is an optional setting under Data Governance for each data domain. When completing e-signature, a reasons dropdown is available where approvers can choose from this pre-defined reason list.

*Note: By default, no reasons will be automatically created. SPORIFY administrators must create reasons suitable for their internal process.*

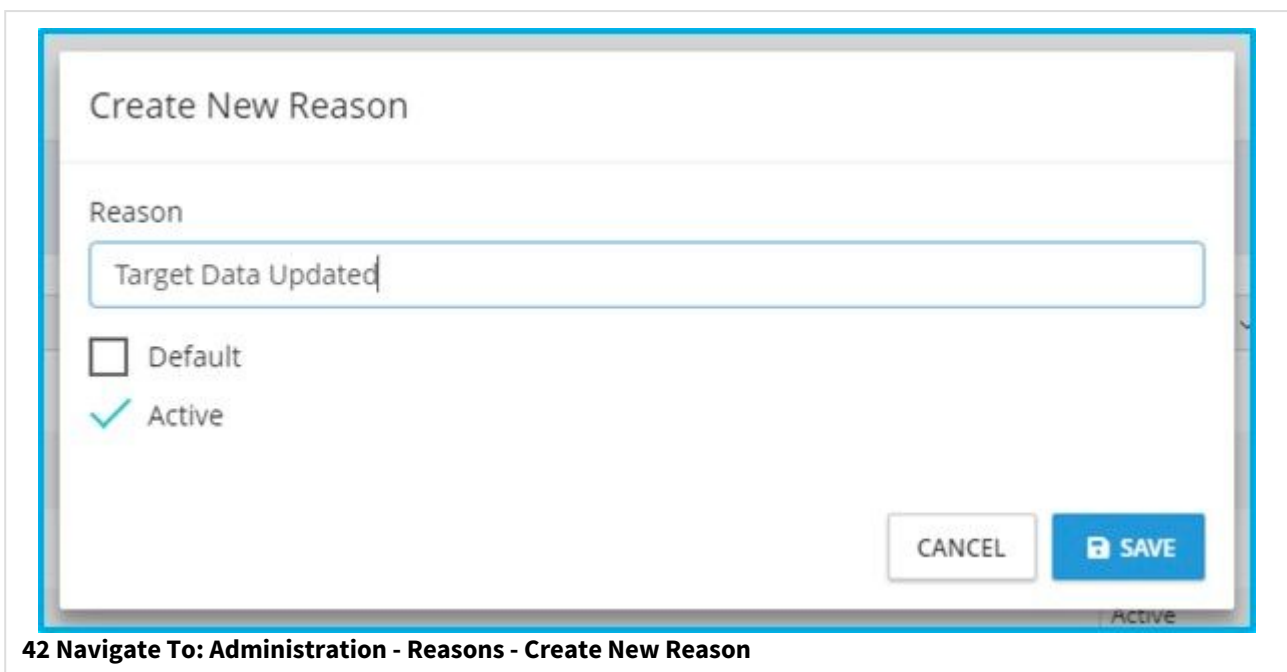




**41 Navigate To: Administration - Reasons**

**Available Actions:**

- Create New Reason
  - Reason
  - On/Off: Default
  - On/Off: Active



**42 Navigate To: Administration - Reasons - Create New Reason**

- Edit

**Edit Reason**

Reason

Target Data Updated

Default

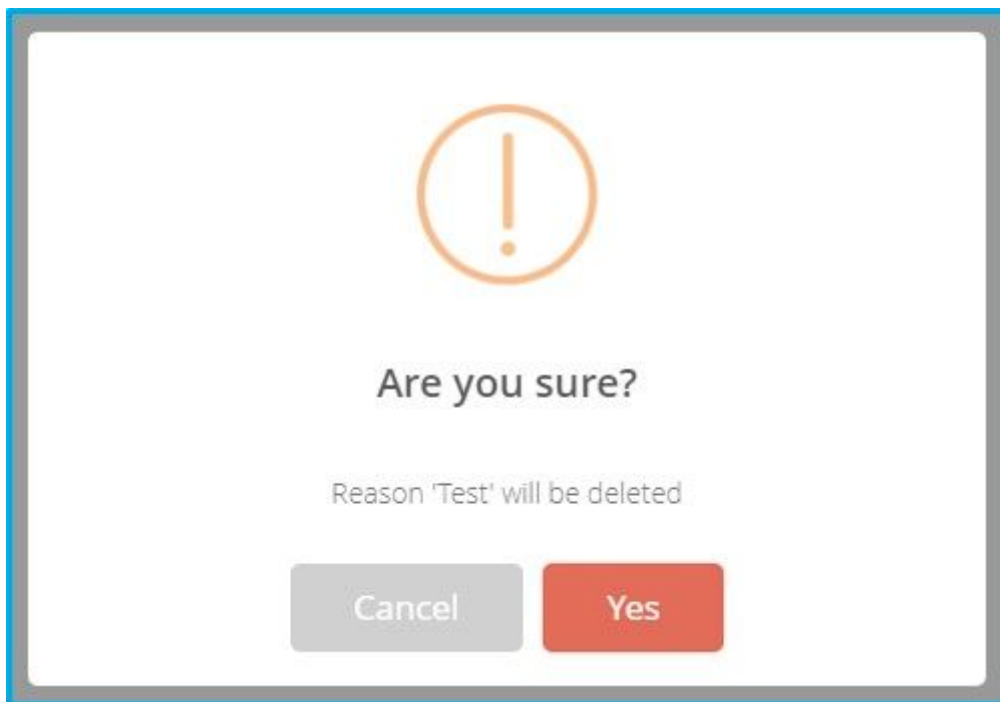
Active

CANCEL SAVE

Active

**43 Navigate To: Administration - Reasons - Cog Icon - Edit**

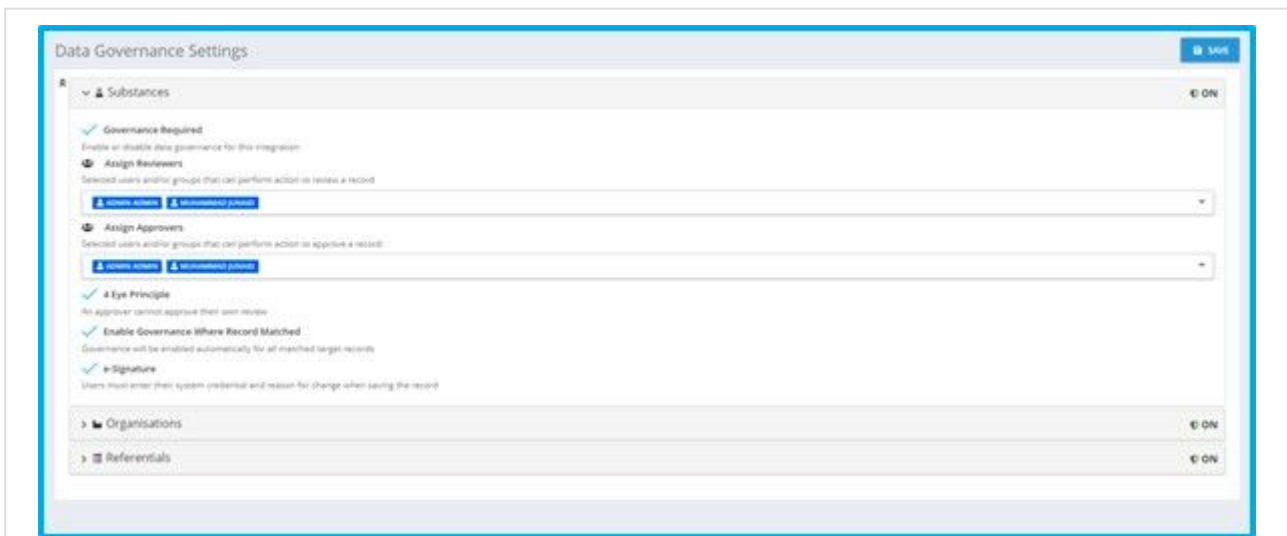
- Delete



**44 Navigate To: Administration - Reasons - Cog Icon - Delete**

## 1.15 Data Governance

### Settings



**45 Navigate To: Administration - Data Governance - Settings**

**Available Settings:**

- Substances
  - On/Off: Governance Required
  - Assign Reviewers
  - Assign Approvers
  - On/Off: 4 Eye Principal
  - On/Off: Enable Governance Where Record Matched
  - On/Off: E-Signature
- Organisations
  - On/Off: Governance Required
  - Assign Reviewers
  - Assign Approvers
  - On/Off: 4 Eye Principal
  - On/Off: Enable Governance Where Record Matched
  - On/Off: E-Signature
- Referentials
  - On/Off: Governance Required
  - Assign Reviewers
  - Assign Approvers
  - On/Off: 4 Eye Principal
  - On/Off: Enable Governance Where Record Matched
  - On/Off: E-Signature

**Governance Status**

Icon	Name	Stage Options	Publish	Status	Created By	Created On	Modified By
	Review	Pending Review		Active	admin	May 18 2022 12:18:34	
	Accept	Approval Options		Active	admin	May 18 2022 12:18:34	
	Reject	Approval Options		Active	admin	May 18 2022 12:18:34	
	Passed	Review Status	Yes	Active	admin	May 18 2022 12:18:34	
	Revoke	Review Status	No	Active	admin	May 18 2022 12:18:34	

**46 Navigate To: Administration - Data Governance - Governance Status**

**Available Actions:**

- Create New Status
  - Name
  - Colour
  - Icon
  - Publish
  - Active

Create New Status

Name

Color

Icon

Publish

Active

CANCEL SAVE

**47 Navigate To: Administration - Data Governance - Governance Status - Create New Status**

- Edit (Static Status)

**Edit Label**

Name  
Accept

Color  
#90ee90

Icon  
THUMBS-UP

CANCEL SAVE

**48 Navigate To: Administration - Data Governance - Governance Status - Cog Icon - Edit**

- Edit (User Defined Status)

**Edit Status**

Name  
Test

Color  
#d9279e

Icon  
GRAIN

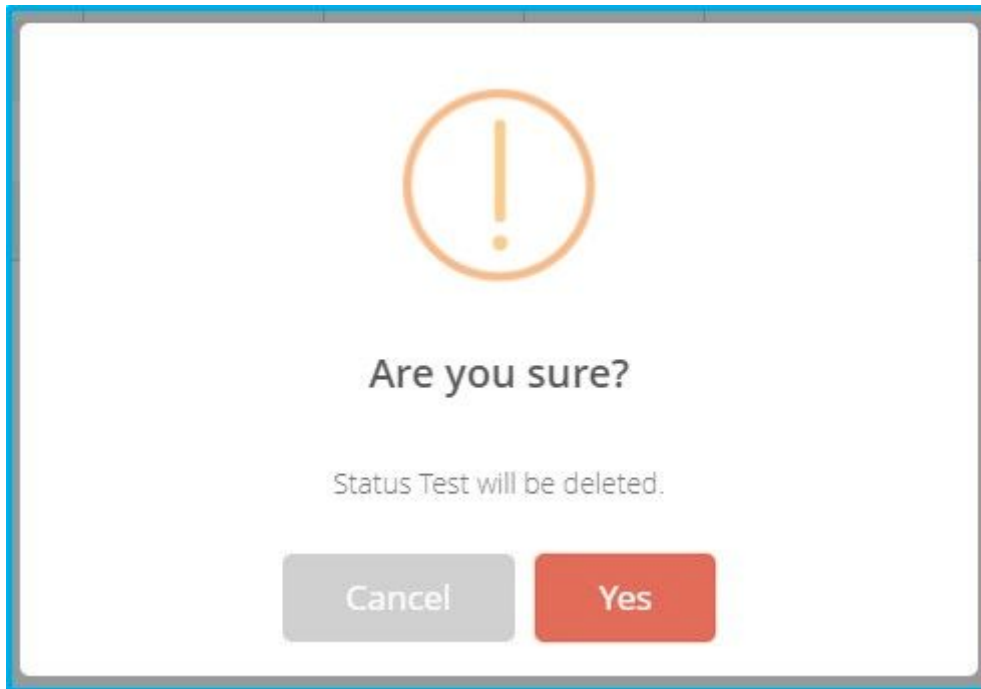
Publish  
 Active

CANCEL SAVE

**49 Navigate To: Administration - Data Governance - Governance Status - Cog Icon - Edit**

- Delete

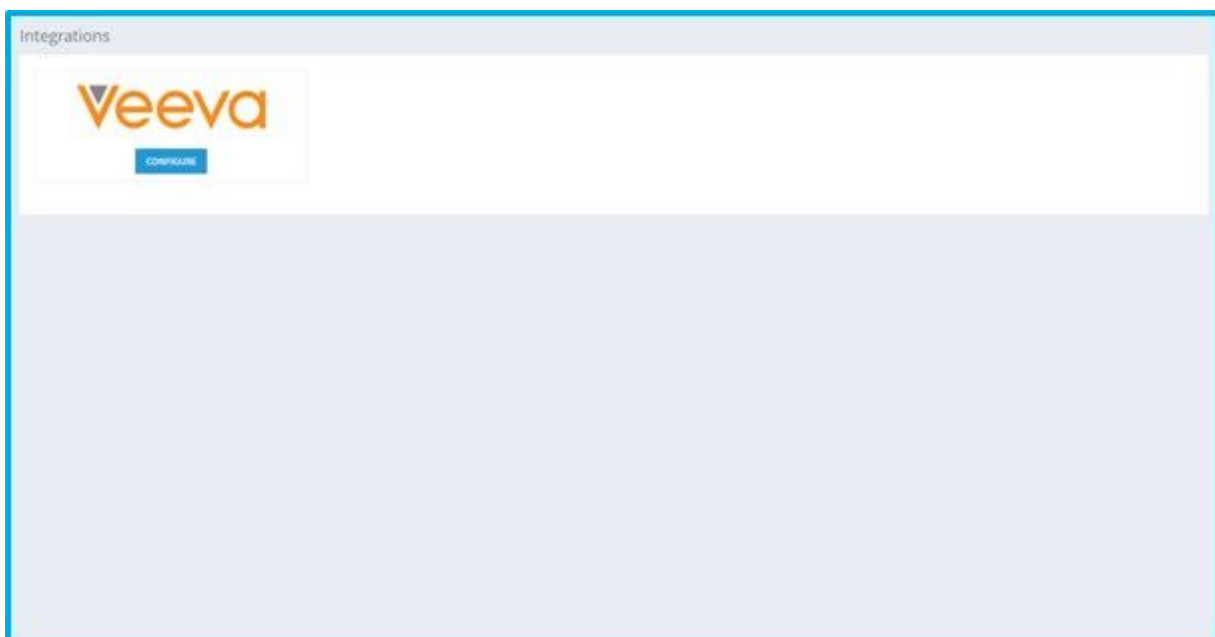
*Note: Only user defined statuses can be deleted.*



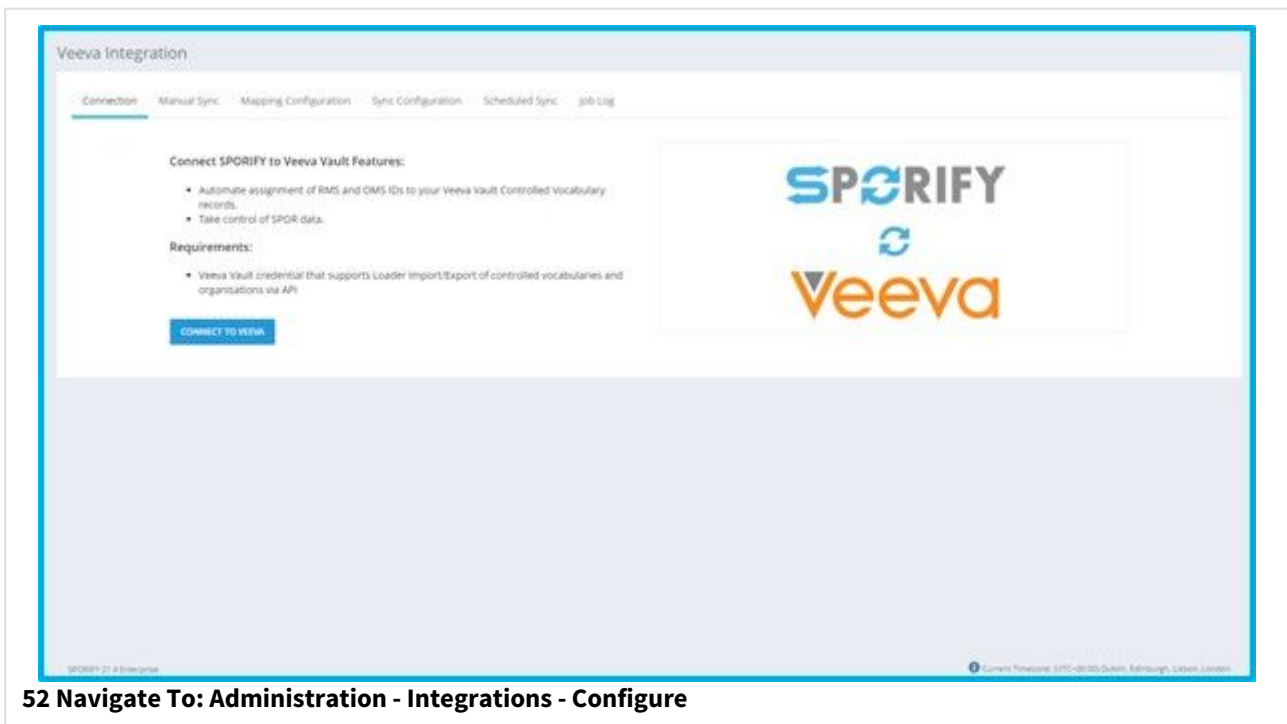
**50 Navigate To: Administration - Data Governance - Governance Status - Cog Icon - Delete**

## 1.16 Veeva Integration

SPORIFY's optional Veeva Integration connects SPORIFY directly with Veeva Vault RIM and synchronises Controlled Vocabularies and Organisation and Substance records with SPORIFY, where you can manage your SPOR data with Data Governance and Data Flow Control.



**51 Navigate To: Administration - Integrations**



**52 Navigate To: Administration - Integrations - Configure**

### 1.16.1 Prerequisites

We recommend the use of a service account for SPORIFY to access Veeva Vault RIM. In order to use SPORIFY'S Veeva Vault RIM integration, it is necessary to have access to the following Veeva Vault RIM objects and fields, all of which are required by the SPORIFY service account.

Access is required to the following Veeva Vault RIM objects:

<b>Vault RIM Object Name</b>
drug_substance_v
excipient__v
organization__rim
country__v
language__rim
controlled_vocabulary__rim

The following fields must be available for import:



Vault RIM Object Name	Vault RIM Field Name
controlled_vocabulary__rim	
	id
	name__v
country__v	
	id
	name__v
language__rim	
	id
	name__v
organization__rim	
	id
	name__v
	address__rim
	city__rim
	state__rim
	postcode__rim
	country__rim.name__v
drug_substance__v	
	id

Vault RIM Object Name	Vault RIM Field Name
	name__v
	ev_code__v
	spor_substance_code__v
	us_substance_code__v
	eudamed_inn__v
	cas_number__v
excipient__v	
	id
	name__v
	ev_code__v
	spor_substance_code__v
	us_substance_code__v

The following fields must be available for export:

Vault RIM Object Name	Vault RIM Field Name	SPORIFY Mapped Data
controlled_vocabulary__rim		
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	spor_list_id__v,	RMS List ID
	spor_list_name__v	RMS List Name
	spor_rms_id__v	RMS Term ID

Vault RIM Object Name	Vault RIM Field Name	SPORIFY Mapped Data
	spor_term__v	RMS Term Name
	spor_status__v	RMS Term Status
	spor_domain__v	RMS Term Domain
	spor_version__v	RMS Term Version
country__v		
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	spor_list_id__v,	RMS List ID
	spor_list_name__v	RMS List Name
	spor_rms_id__v	RMS Term ID
	spor_term__v	RMS Term Name
	spor_status__v	RMS Term Status
	spor_domain__v	RMS Term Domain
	spor_version__v	RMS Term Version
language__rim		
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	spor_list_id__v,	RMS List ID
	spor_list_name__v	RMS List Name

Vault RIM Object Name	Vault RIM Field Name	SPORIFY Mapped Data
	spor_rms_id__v	RMS Term ID
	spor_term__v	RMS Term Name
	spor_status__v	RMS Term Status
	spor_domain__v	RMS Term Domain
	spor_version__v	RMS Term Version
organization__rim		
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	spor_oms_id__v	SPOR OMS ID
	spor_location_id__v	SPOR LOC ID
	location_status__v	SPOR LOC Status
drug_substance__v		
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	ev_code__v	ev code (XEVMPPD)
	spor_substance_code__v	EUTCT ID
	us_substance_code__v	G-SRS UNII
	spor_term__v	EUTCT Substance Name
excipient__v		

Vault RIM Object Name	Vault RIM Field Name	SPORIFY Mapped Data
	Vault RIM fieldname	SPORIFY Mapping
	id	N/A
	ev_code__v	ev code (XEVMPPD)
	spor_substance_code__v	EUTCT ID
	us_substance_code__v	G-SRS UNII
	spor_term__v	EUTCT Substance Name

### 1.16.2 Account Permissions

The following account permissions are advised to provide least privilege to the service account used to connect to your Vault RIM tenant.

#### Permissions Set - Details:

- Status: Active
- Name: SPORIFYIntegration
- Description: Permission set used for SPORIFY sync via Loader API
- Created By: [Name]
- Created Date: [Date]
- Last Modified By: [Name]
- Last Modified Date: [Date]

**53 Details**

#### Permissions Set - Application:

API Permissions:

- All API
- Access API
- Events API
- Metadata API

File Staging Permissions:

- Access

Vault Owner Actions Permissions:

- Vault Loader

The screenshot shows the Vault RIM SBX interface. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The left sidebar lists 'USERS & GROUPS' with sub-items: 'Vault Users', 'Domain Users', 'Groups', 'Security Profiles', 'Permission Sets', and 'Application Roles'. The main content area is titled 'SPORIFY Integration' and has tabs for 'Details', 'Admin', 'Application', 'Objects', 'Tabs', 'Pages', and 'Mobile'. The 'Application' tab is active, showing two tables of permissions.

	All API	Access API	Events API	Metadata API
API	✓	✓	✓	✓

	Access
File Staging	✓

	Re-render	Power Delete	Vault Loader	Record Migration	Document Migration
Vault Owner Actions			✓		

**54 Application**

**Permissions Set - Objects:**

Read, Create & Edit Permissions:

- Base Active Substance
- Specified Active Substance
- Active Substance
- Ingredient
- Controlled Vocabulary
- Country
- Language
- Organization

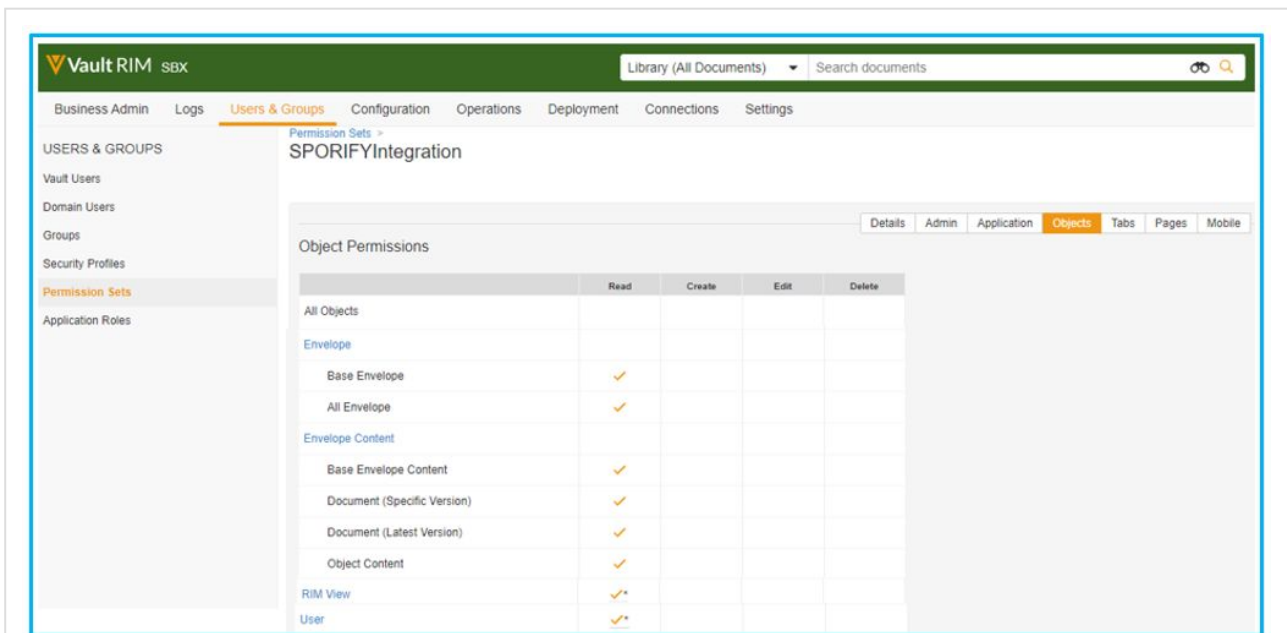
The screenshot shows the Vault RIM SBX interface. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The left sidebar lists 'USERS & GROUPS' with sub-items: 'Vault Users', 'Domain Users', 'Groups', 'Security Profiles', 'Permission Sets', and 'Application Roles'. The main content area is titled 'SPORIFYIntegration' and contains a table of 'Object Permissions'. The table has columns for 'Read', 'Create', 'Edit', and 'Delete'. The 'Read' column contains checkmarks for all listed objects. The 'Create' and 'Edit' columns contain checkmarks for 'Base Active Substance', 'Specified Active Substance', 'Active Substance', 'Ingredient', 'Controlled Vocabulary', 'Country', 'Language', and 'Organization'. The 'Delete' column is empty for all objects.

	Read	Create	Edit	Delete
All Objects				
Active Substance				
Base Active Substance	✓	✓	✓	
Specified Active Substance	✓	✓	✓	
Active Substance	✓	✓	✓	
Ingredient	✓	✓	✓	
Controlled Vocabulary	✓	✓	✓	
Country	✓	✓	✓	
Language	✓	✓	✓	
Organization	✓	✓	✓	

**55 Objects - Read, Create & Edit**

Read Only Permissions:

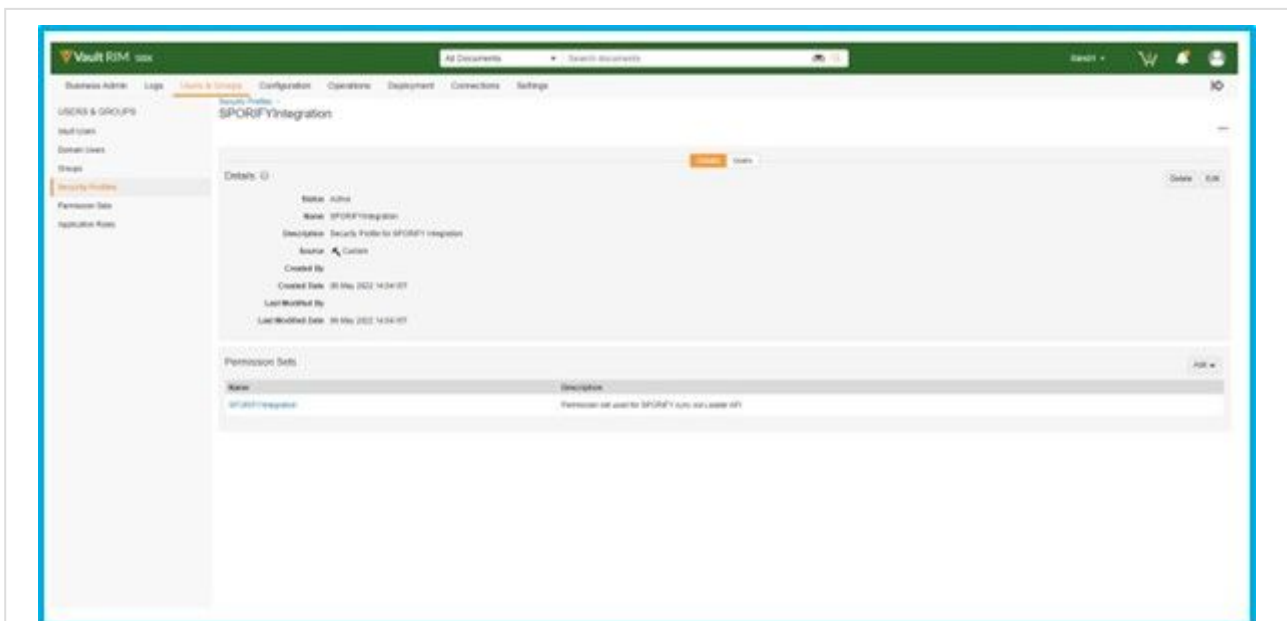
- Base Envelope
- All Envelope
- Base Envelope Content
- Document (Specific Version)
- Document (Latest Version)
- Object Content
- RIM View
- User



**56 Objects - Read**

**Profile Setup:**

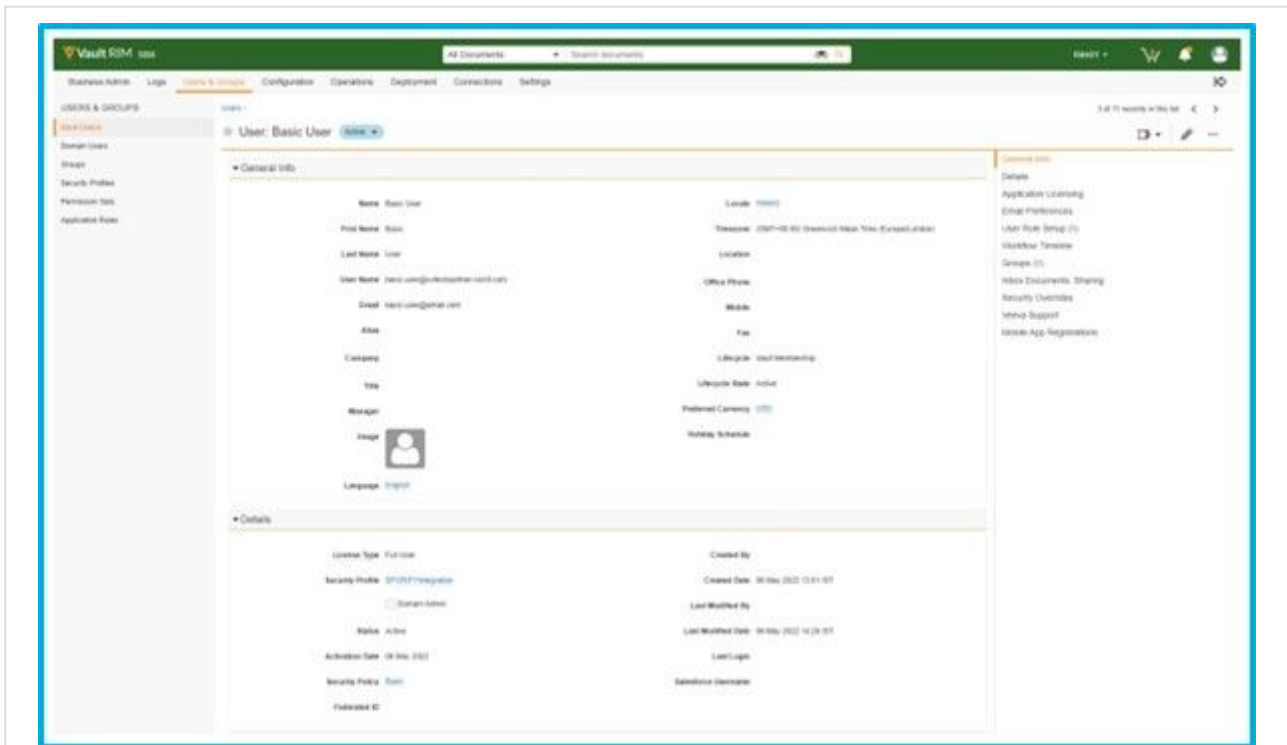
- Create a security profile to use the earlier created permissions set.



**57 Security Profile**

- Create a user profile attached to the earlier created security profile.





58 User Profile

### 1.16.3 Settings

**Available Actions:**

- Connect to Veeva
  - Vault Subdomain
  - Username and Password
    - Username
    - Password

Veeva Connection

Vault Subdomain

User Name and Password

User Name

Password

CANCEL SAVE

**59 Navigate To: Administration - Integrations - Configure - Connect to Veeva - User Name and Password**

- Run Manual Sync
  - Full Sync
  - Referentials Only
  - Organisations Only
  - Substances Only

The screenshot displays the 'Veeva Integration' interface. At the top, there are navigation tabs: 'Connection', 'Manual Sync', 'Mapping Configuration', 'Sync Configuration', 'Scheduled Sync', and 'Job Log'. The 'Manual Sync' tab is active. Below the tabs, there is a table with two columns: 'Event Description' and 'Status'. The table lists various sync steps, each with a status indicator of three orange bars. To the right of the table is a large graphic featuring the 'SPORIFY' logo in blue and the 'Veeva' logo in orange, with a circular arrow icon between them. Below the logos is a 'FULL SYNC' dropdown menu and a 'SYNC NOW' button. At the bottom of the interface, there is a footer with 'SPORIFY © 4 Enterprise' on the left and '© 2019-2020 CorrIT Ltd. Dublin, Edinburgh, London, London' on the right.

Event Description	Status
Connecting To Veeva Vault	■■■
Running Veeva Vault Loader: Extracting Controlled Vocabularies	■■■
Importing Controlled Vocabularies to SPORIFY	■■■
Running SPORIFY Referentials Mapping	■■■
Running Veeva Vault Loader: Loading Controlled Vocabularies	■■■
Running Veeva Vault Loader: Extracting Organizations	■■■
Importing Organizations to SPORIFY	■■■
Running SPORIFY Organizations Mapping	■■■
Running Veeva Vault Loader: Loading Organizations	■■■
Running Veeva Vault Loader: Extracting Substances	■■■
Importing Substances to SPORIFY	■■■
Running SPORIFY Substances Mapping	■■■
Running Veeva Vault Loader: Loading Substances	■■■
Sync Completed	■■■

**60 Navigate To: Administration - Integrations - Configure - Manual Sync**

- Add New List Mapping
  - Veeva List
  - List Type
  - Mapping Target
  - Active

New List Mapping

Veeva List  
DRUG\_SUBSTANCE\_V

List Type  
SUBSTANCES

Mapping Target  
EUTCT

✓ Active

CANCEL SAVE

61 Navigate To: Administration - Integrations - Configure - Mapping Configuration - New List Mapping

- Edit

### Edit List Mapping

Veeva List  
CONTROLLED\_VOCABULARY\_RIM

Controlled Vocabulary Type  
NOTHING SELECTED

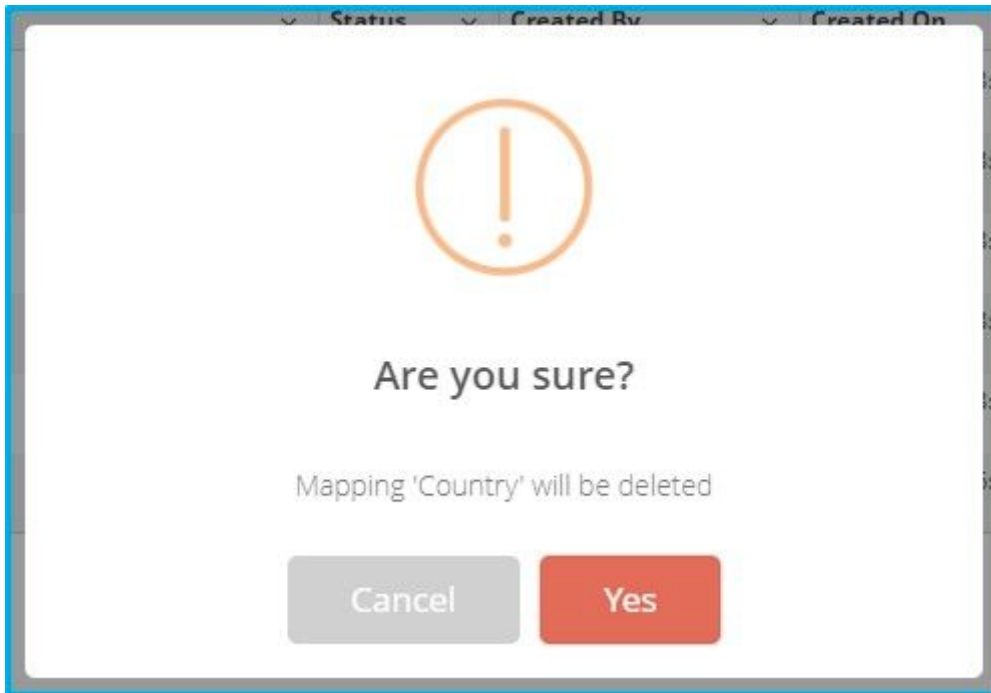
List Type  
REFERENTIALS

Mapping Target  
TISSUE

Active

62 Navigate To: Administration - Integrations - Configure - Mapping Configuration - Cog Icon - Edit

- Delete



**63 Navigate To: Administration - Integrations - Configure - Mapping Configuration - Cog Icon - Delete**

- Set Sync Configuration Settings
  - Mapped Record Options
    - On/Off: Limit Mapped Data By Resolution Status
    - On/Off: Limit Target Data By Governance Status
  - Unmatched Record Options
    - On/Off: Limit Unmatched Data Included In Sync By Resolution Status
- Advanced Vault Loader Options
  - controlled\_vocabulary\_rim
  - country\_v
  - drug\_substance\_v
  - excipient\_v
  - language\_rim
  - organization\_rim

Veeva Integration

Connection Manual Sync Mapping Configuration **Sync Configuration** Scheduled Sync Job Log

**Mapped Record Options** SAVE

Limit Target Data Included In Sync By Governance Status  
If enabled, target data included in the sync must be in the Approved stage of data governance and have a data governance status where the associated Publish flag is true. If disabled, target data included in the sync must be in the Approved stage of data governance but can have any data governance status.

Limit Matched Data Included In Sync By Resolution Status  
If enabled, matched data will only be included in the sync if it has the same resolution status as selected below. If disabled, matched data included in the sync can have any resolution status.

**Unmatched Record Options**

Limit Unmatched Data Included In Sync By Resolution Status  
If enabled, unmatched data included in the sync can only have the resolution status selected below. If disabled, unmatched data included in the sync can have any of the following resolution statuses: Suggested, Not Set or any custom status where Maintain Matched Record is false.

**Advanced Vault Loader Options**

Use this section to provide a Criteria VQL [expression](#) for each of the Veeva objects listed below. This expression will be included in the API call that Sporigy makes to the Veeva Vault Loader Extract endpoint and it can be used to limit the amount of data that Sporigy receives. Veeva provides good documentation [to help you create this expression](#).  
A simple expression to only export active items might look like this:

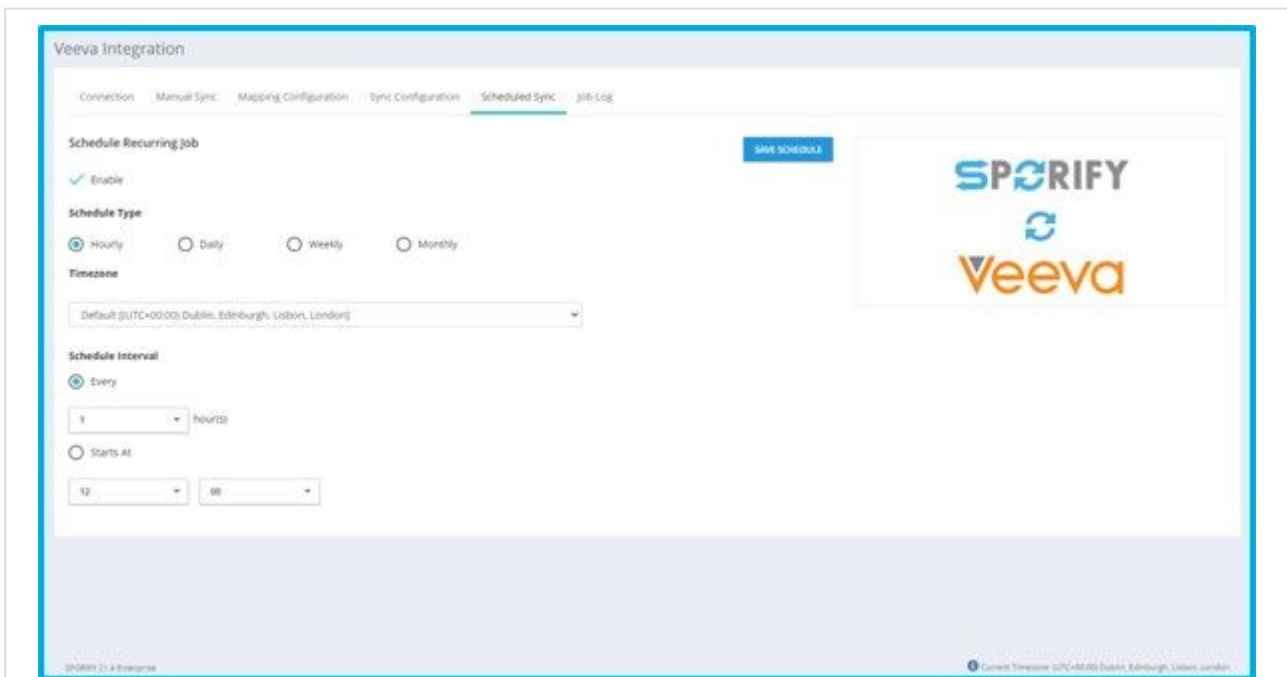
```
status__v = 'active__v'
```

controlled\_vocabulary\_\_rim  
country\_\_v  
drug\_substance\_\_v  
excipient\_\_v  
language\_\_rim  
organization\_\_rim

SPORIFY 23.1 (v20230309-1) Enterprise Current Timezone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London

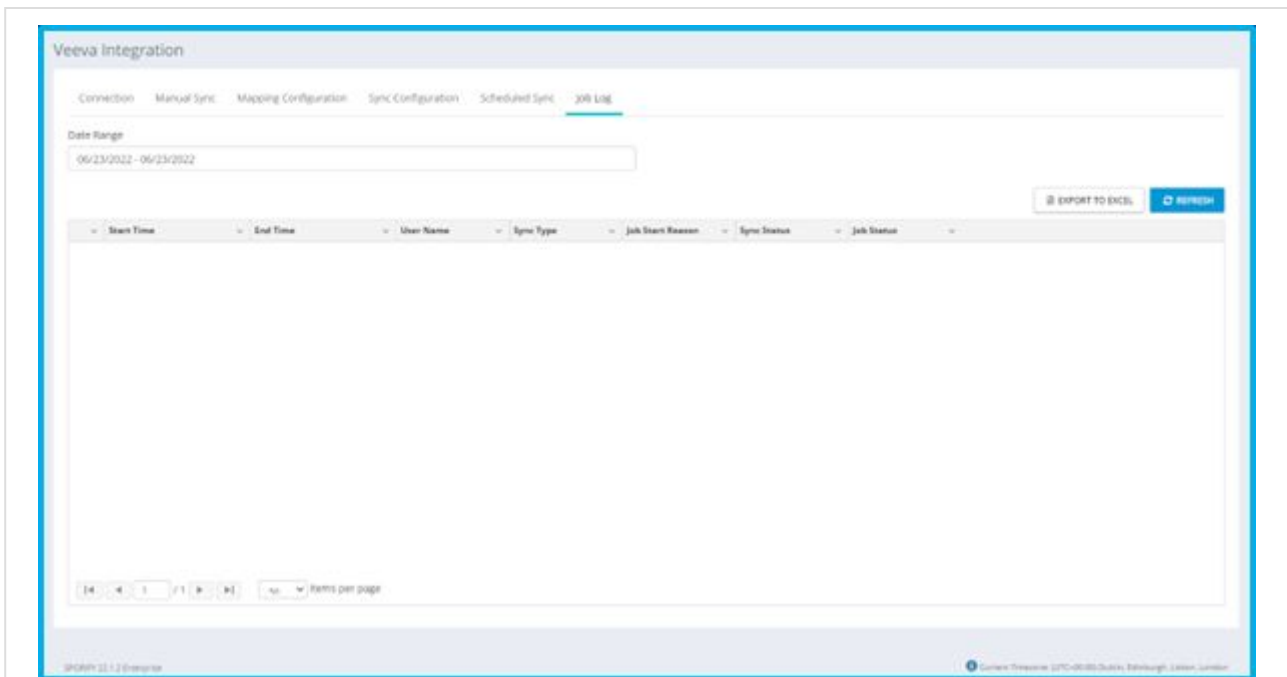
**64 Navigate To: Administration - Integrations - Configure - Sync Configuration**

- Set Scheduled Sync
  - Enable/Disable
  - Schedule Type
    - Hourly
      - Every X hour(s)
      - Starts at [HH:MM]
    - Daily
      - Everyday
      - Every weekday
      - Starts at [HH:MM]
    - Weekly
      - Week Days
      - Starts at [HH:MM]
    - Monthly
      - Day X of every Y months
      - The [Number] [Day] of every [Number] months(s)
      - Starts at [HH:MM]
  - Timezone



**65 Navigate To: Administration - Integrations - Configure - Scheduled Sync**

- View Job Log



**66 Navigate To: Administration - Integrations - Configure - Job Log**

- Export to Excel
- Filter
  - Date Range