21R2 Commercial & Medical Release Deep Dive

July 2021

Veeva

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Veeva

21R2 Key Dates

Dates	Event
July 12	(all PODs) Pre-release vaults available
July 12 – 16	Validation package available on VeevaDocs **July 12**: System Release Memo **July 13**: Compliance Documents **July 16**: Executed OQs
July 27	**EU Commercial and Medical Q&A Session** https://veeva.zoom.us/webinar/register/WN_DG5lq_xVT-S0OgHKqDjcSg **NA Commercial and Medica Q&A Session** https://veeva.zoom.us/webinar/register/WN_aGif4y2RRG-uqZW_icaBUA
July 16	**Developer Release** https://veeva.zoom.us/webinar/register/WN_TbSCT2GYQ-aDoBV3C5JEjg
July 30	Release to all limited release PODs and PODs VV1-8, VV1-1068, VV1-1065, VV1-1088, VV1-1054, VV2-2122 Vault *File Manager does not release at this time, and instead releases with the general release PODs*
August 6	Release to all general release PODs

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Announcements

Internet Explorer

22R1

- Vault will no longer support the Microsoft Internet Explorer 11 browser application

- Microsoft has announced IE 11 will be retired on June 15, 2022

Supported Browsers

- Refer to Vault's list of supported browsers to identify an appropriate browser to use.

- Supported browsers

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Document Workflow 2021 Timeline

Important Disclosure: The following outlines Veeva's current product direction. These plans may change as we learn more

21R1

- New template workflows for Component and Reference documents available for optional use

- You can still edit legacy workflows
- You can still create and copy legacy workflows

21R2

- Old workflow tab renamed "Legacy Workflow"
- MDW workflow renamed 'Document Workflow'
- New template workflows for Material documents available for optional use

- You can still edit legacy workflows
- You can still create and copy legacy workflows

21R3

- One Workflow tab to create Workflows
- No Create or Copy for Legacy Workflows

- You can still edit legacy workflows

Projects in-flight to think about building workflows in One Workflow

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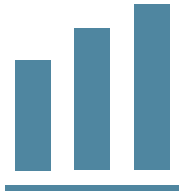
21R2: Office Online Support

21R2 Office Online Support stops



Collaborative Authoring replaces Office Online

Users can check back in until 21R3

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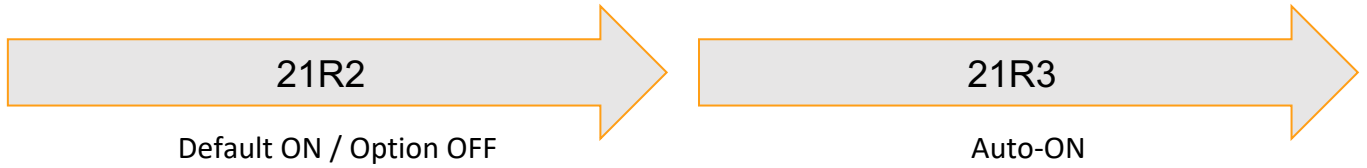
Vault Action User Interface Enhancements

- Several exciting features to enhance usability with an updated look and feel
  - **Vault UI Styling** - modern look and feel
  - **Action Bar** - easily access frequently used actions on a record or document
  - **Doc Info Page Enhancements** - improved usability in managing document and annotation
  - **Notification Badge** - view notifications from anywhere in Vault
  - **Action Menu Button Change** - updates all action menu button to ellipsis icon
  - **Annotate UX Refresh** – visual and usability improvements
  - **Display Start Workflow Actions in Most Frequently Used Actions** – configure Start Workflow user actions to display as 'Most Frequently Used Actions' in the Action Bar
- These enhancements are planned as **Auto-on** immediately with the 21R2 upgrade
  - Customers may choose to turn OFF the UI changes after **21R2 (August 2021)** in order to prepare training materials
  - Changes become permanent, auto-ON, for all vaults with **21R3 (December 2021)**



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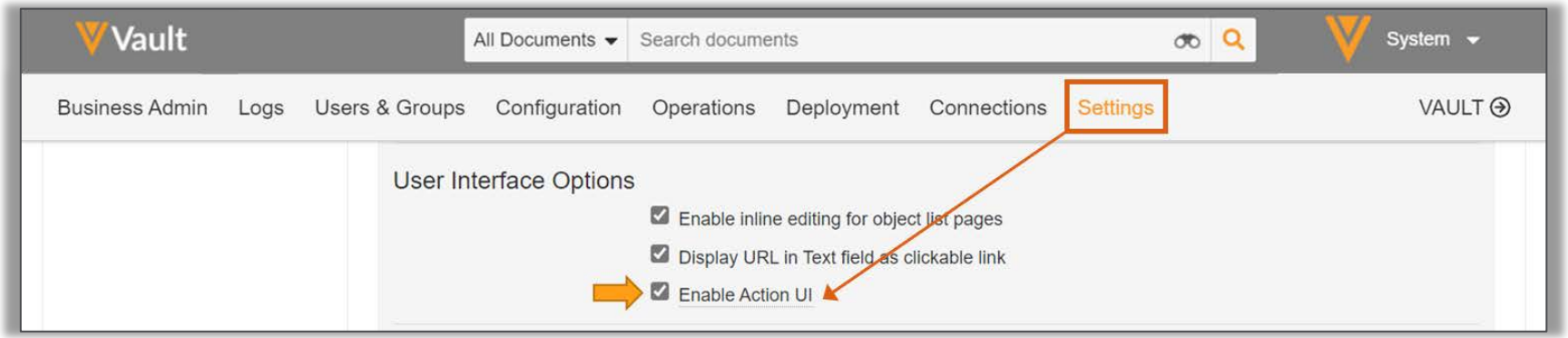
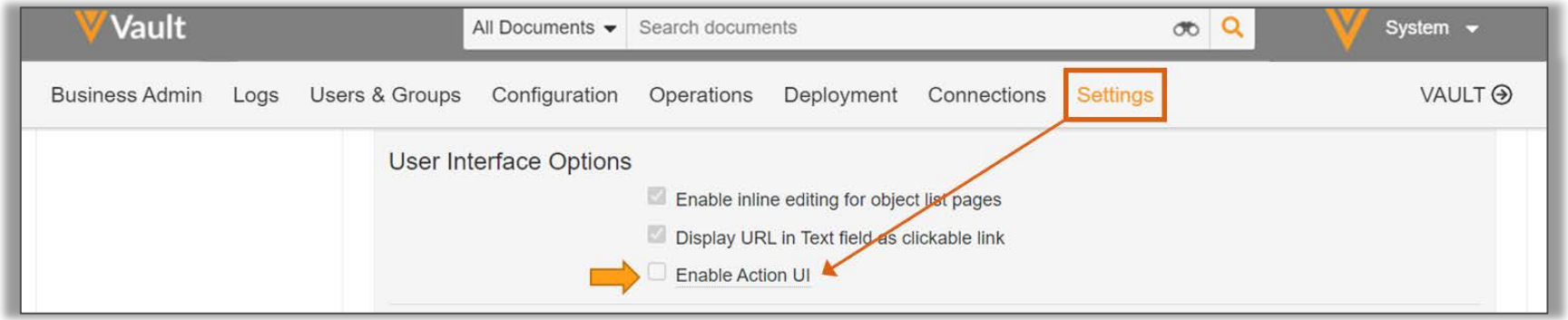
Action UI

Action UI Feature Setting

- Located in ***Admin > Settings > General > User Interface Options***
- Feature Setting as Delivered: Action UI will be in effect for all users in this Vault in 21R2



- Feature Setting Disabled by Admin: Action UI will not be visible to any users in this Vault



- Feature Setting in 21R3: Setting will be permanently enabled, with no option to disable in any Vault

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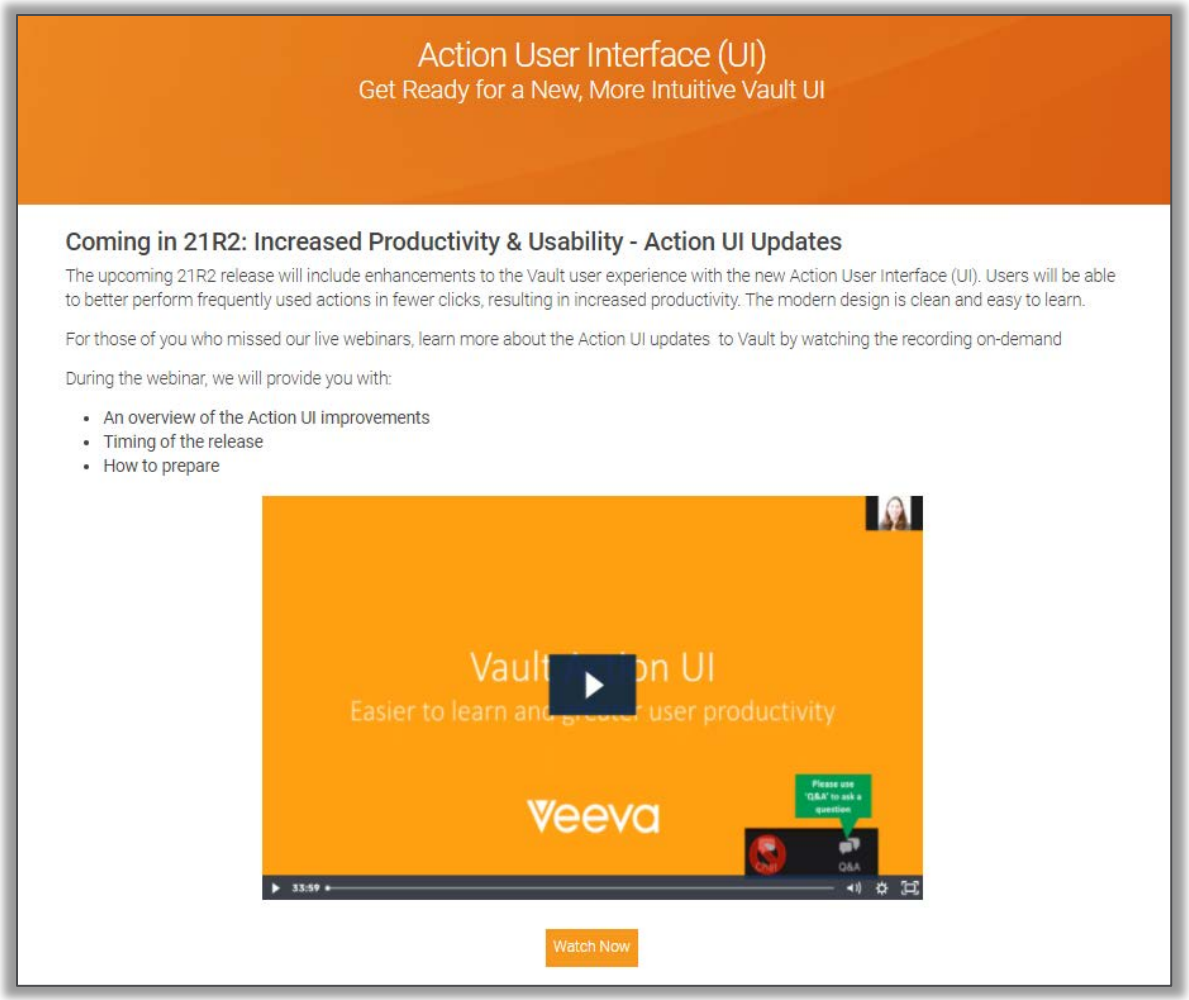
Action User Interface (UI) Hub

- The Action UI Hub includes the most up to date information about Action UI:
  - Recording of past webinar
  - Frequently Asked Questions
  - Timelines for implementation
  - Education materials for download

- Access the site at:

  go.veeva.com/21R2-ActionUI



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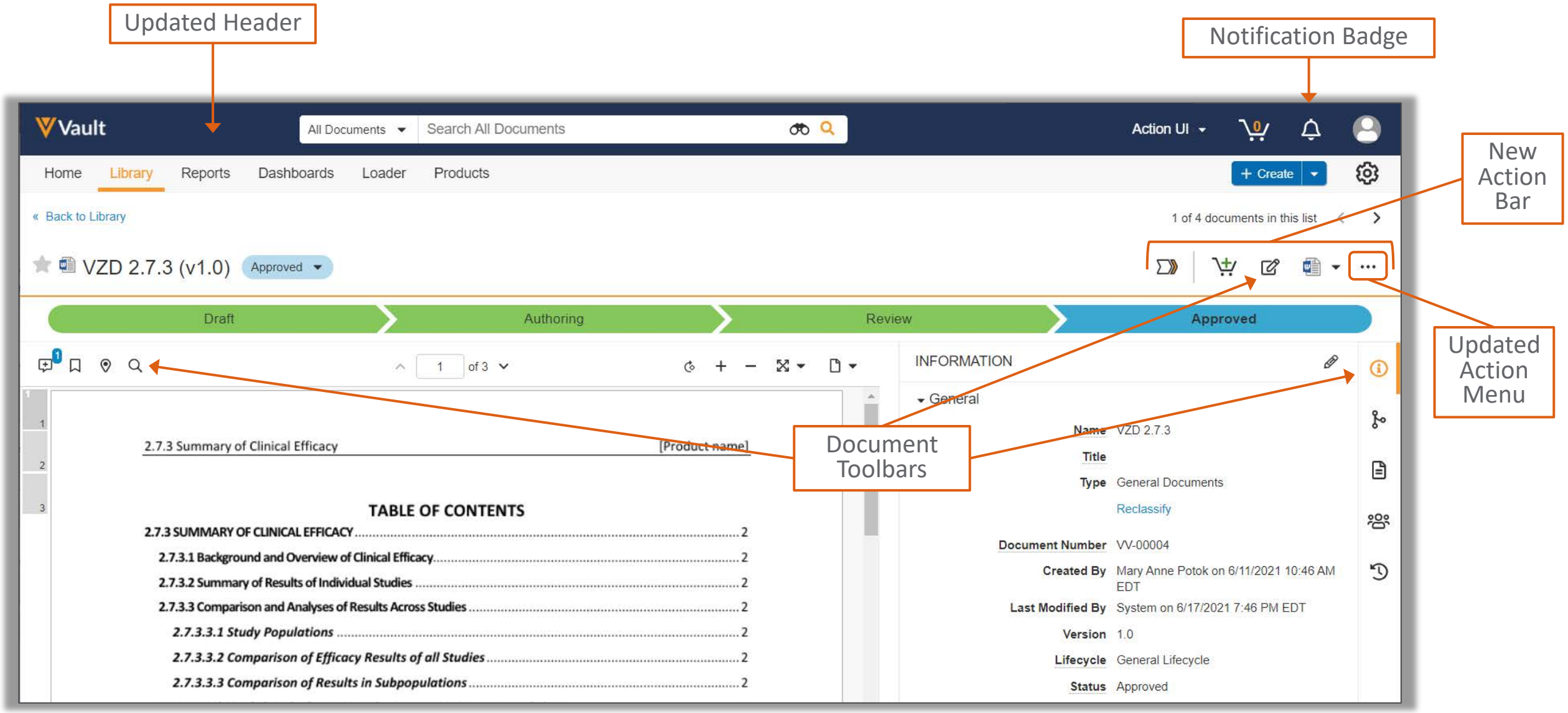
Action UI Highlights



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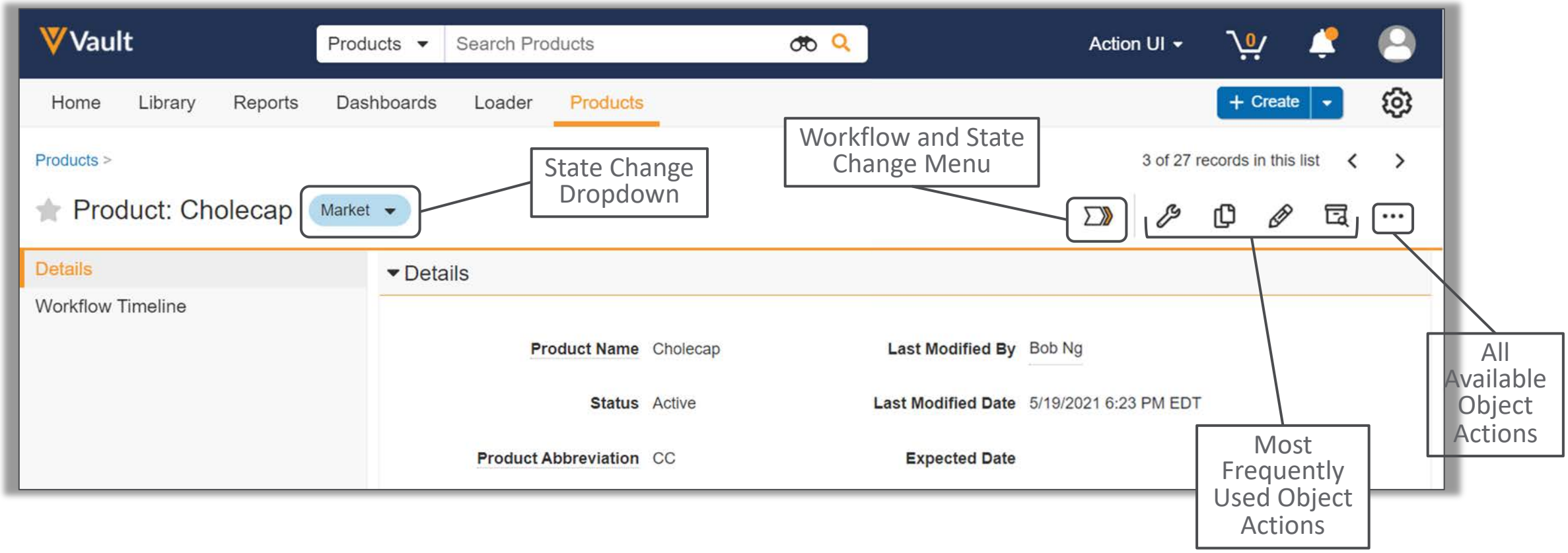
Object Record Overview

- Most commonly used Actions for each Record and Lifecycle State will continuously update on the Action Bar



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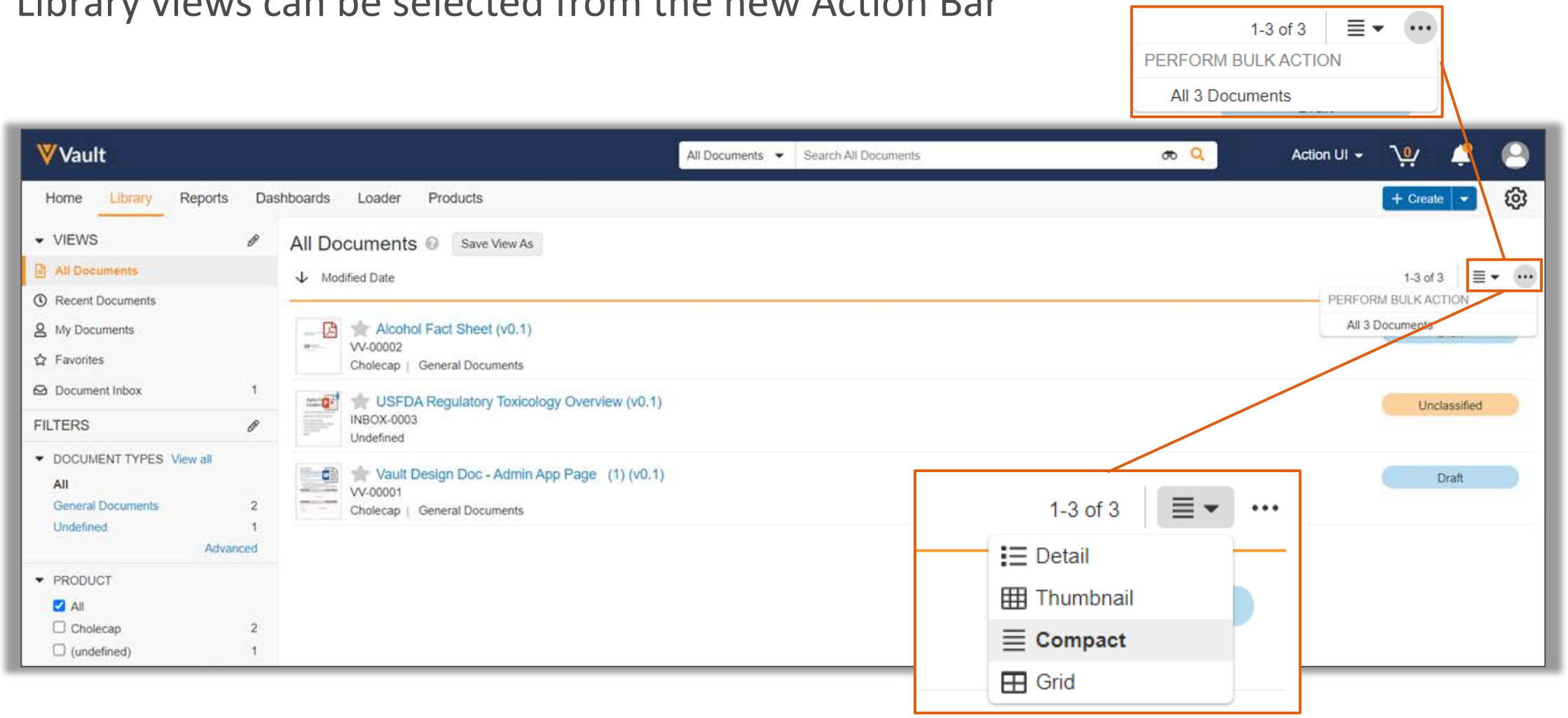
Library Overview

- Bulk actions can be accessed from the All Actions menu icon (ellipsis)
- Library views can be selected from the new Action Bar



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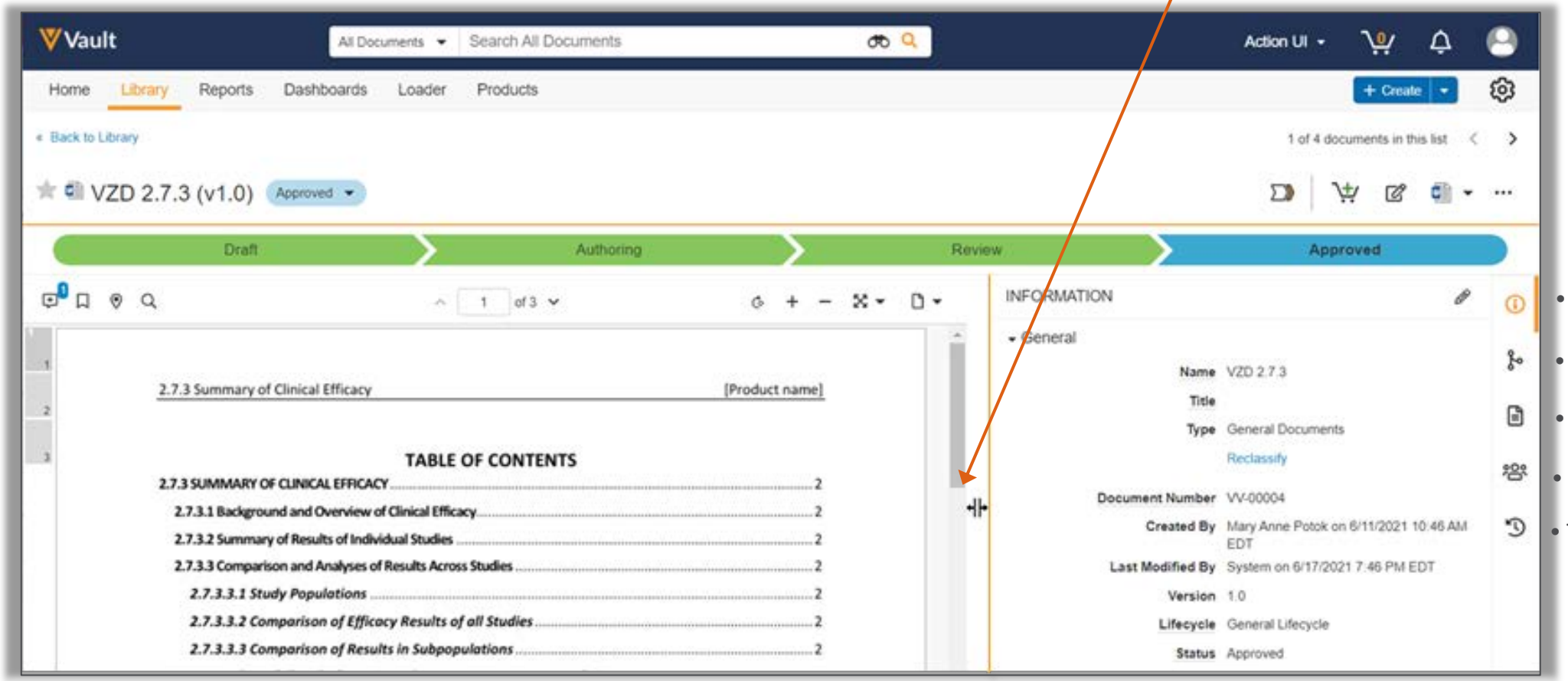
Document Information

- The Doc Info pane can be collapsed or expanded, and users can click and drag to resize the pane



- Information
- Relationships
- Files
- Sharing Settings
- Timeline View

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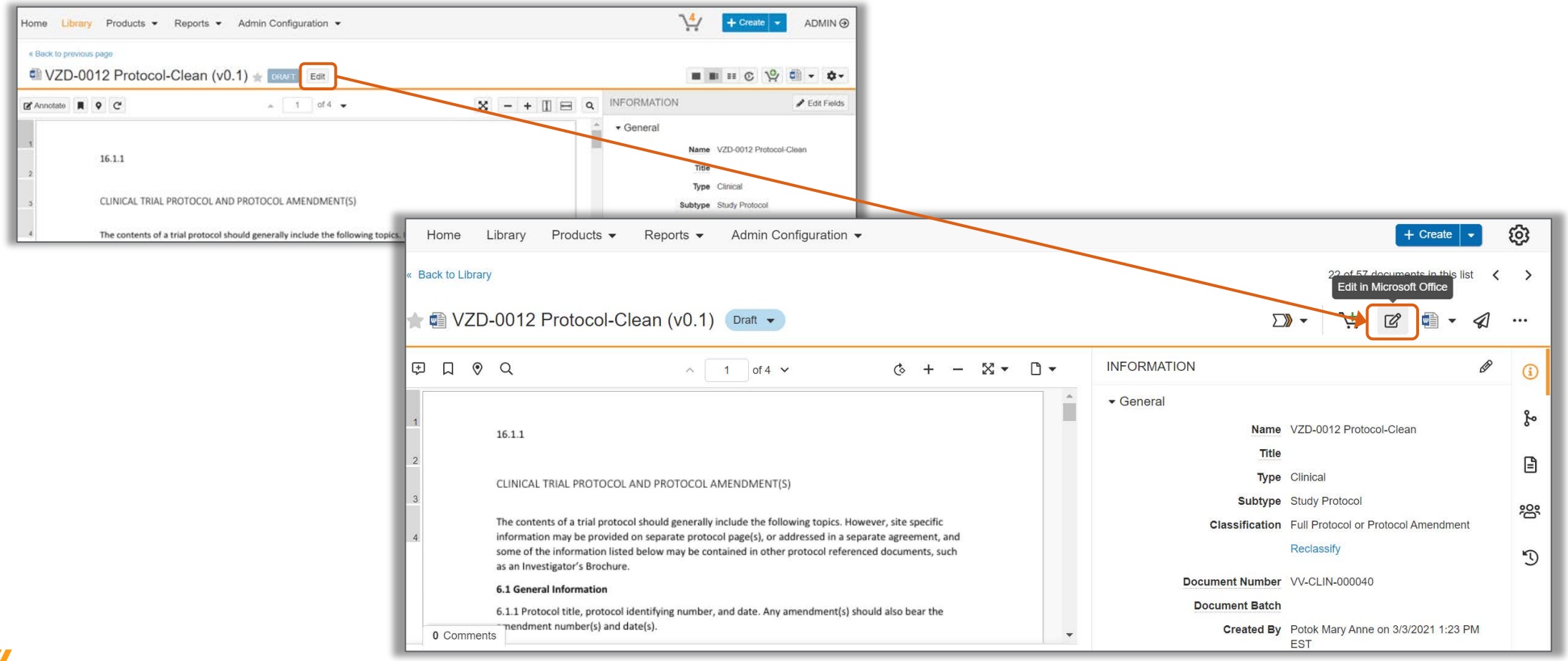
Collaborative Authoring

- Collaborative Authoring has its own dedicated menu
- The ‘Edit in Microsoft Office’ action is available in the Actions menu, and will be featured in the Action Bar if it is a frequently used action



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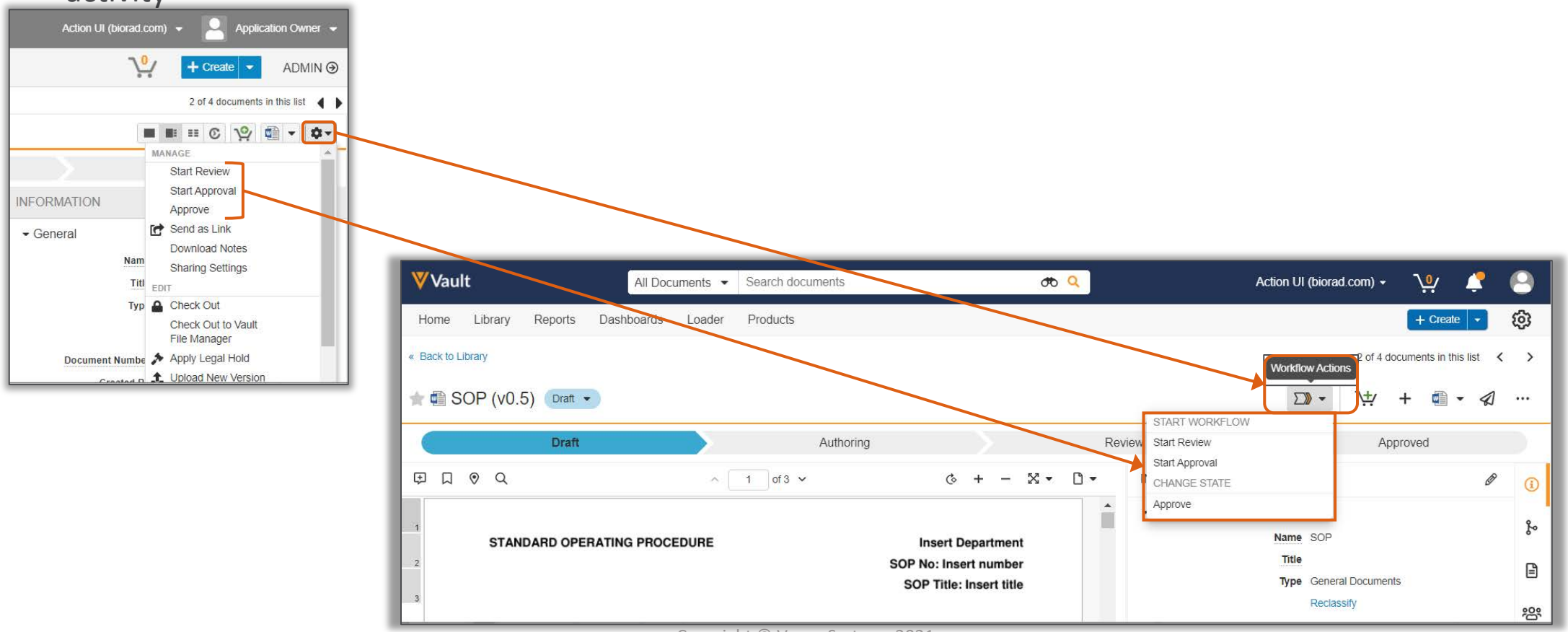
Document Lifecycles and Workflows

- Workflows now have their own dedicated dropdown menu, with available actions for your document or object
- You will only see this Workflow menu if the document is available for a Workflow in this particular state, and you have permission to start a Workflow or make a direct state change
- Unlike the frequently used actions buttons, the Workflow button is fixed, and not based on the user's system activity



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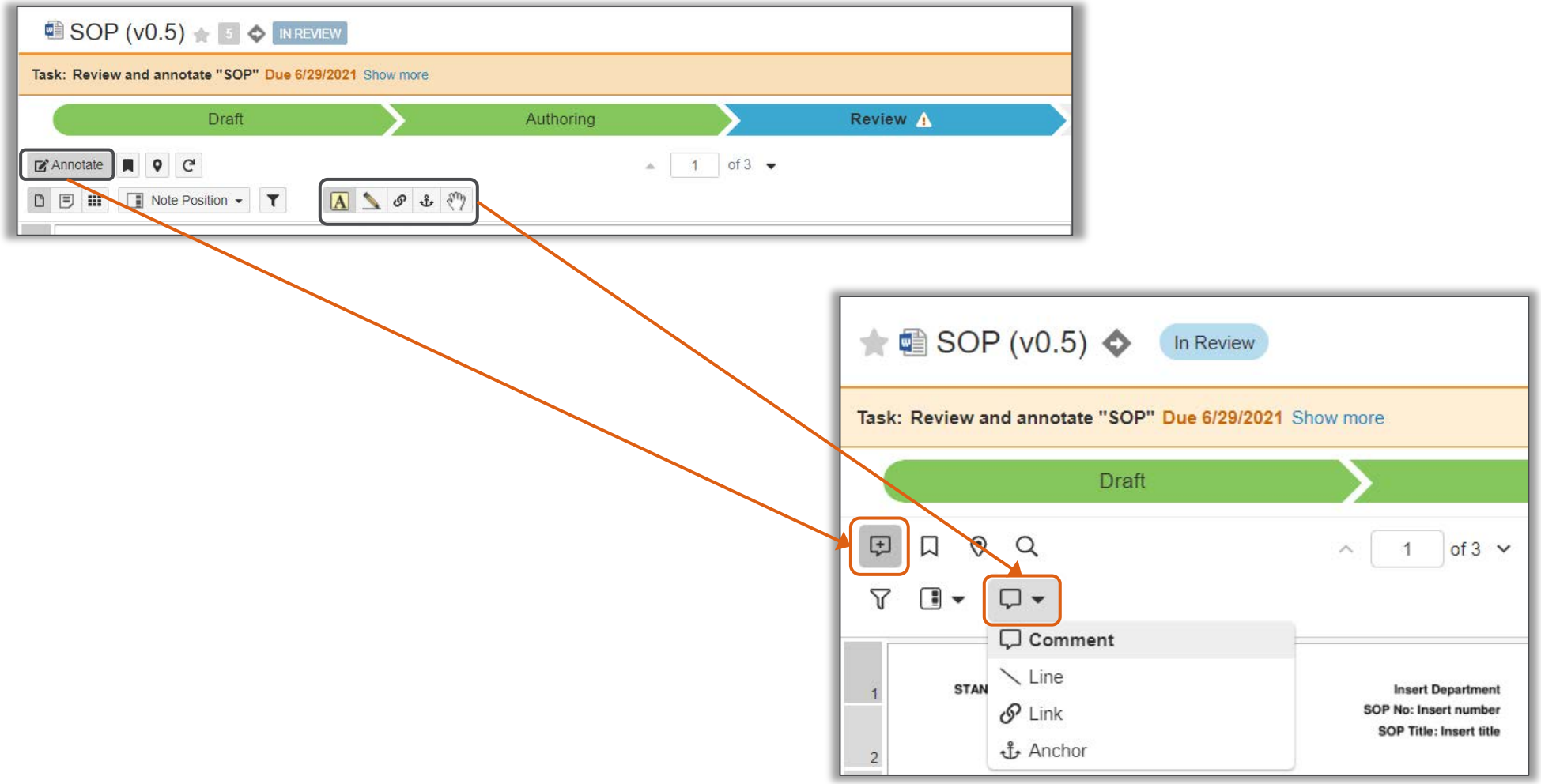
Annotations

- Annotation interface has been updated with a simplified and modern toolbar



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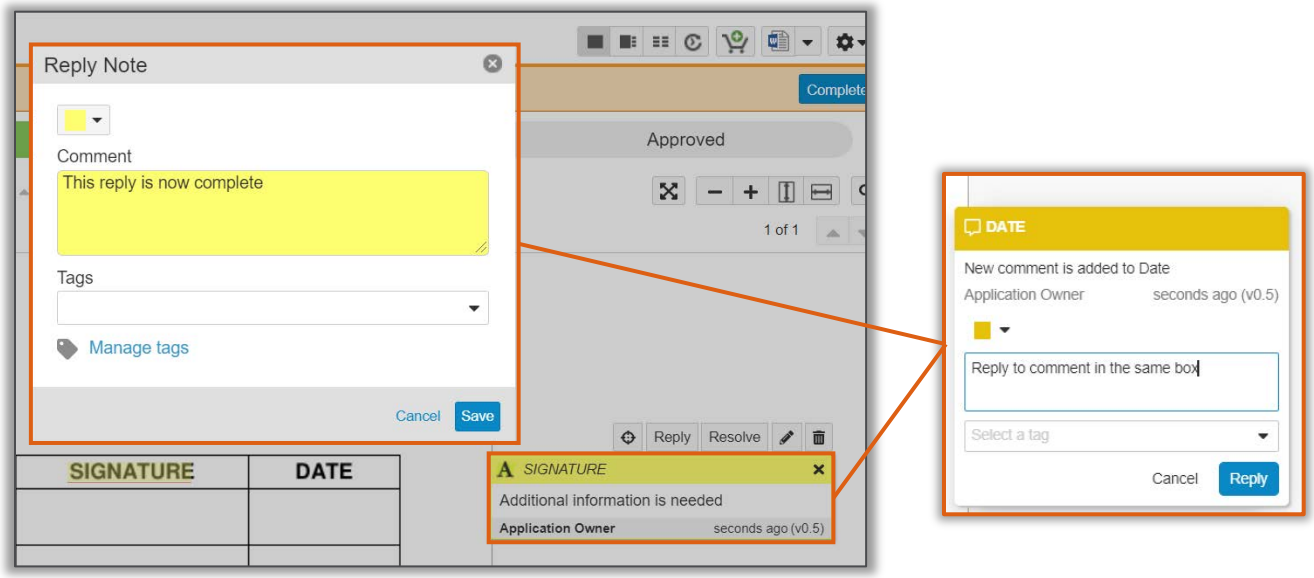
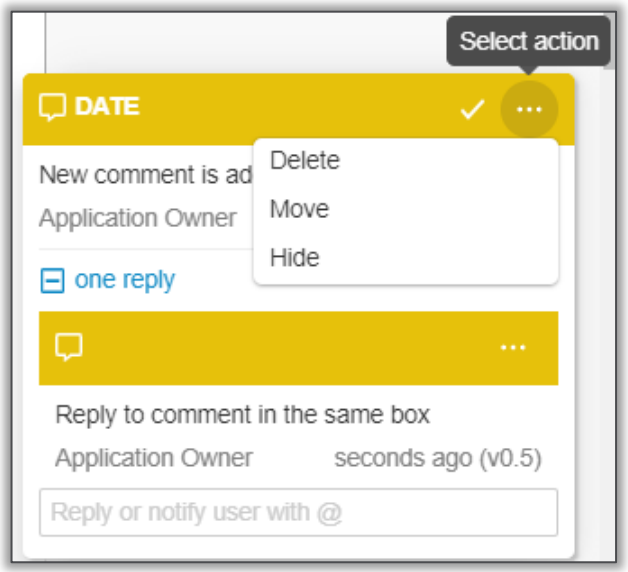
Annotations

- Reply to comments directly instead of creating a separate reply card
- Edit and resolve comments from the new Action menu on each info card





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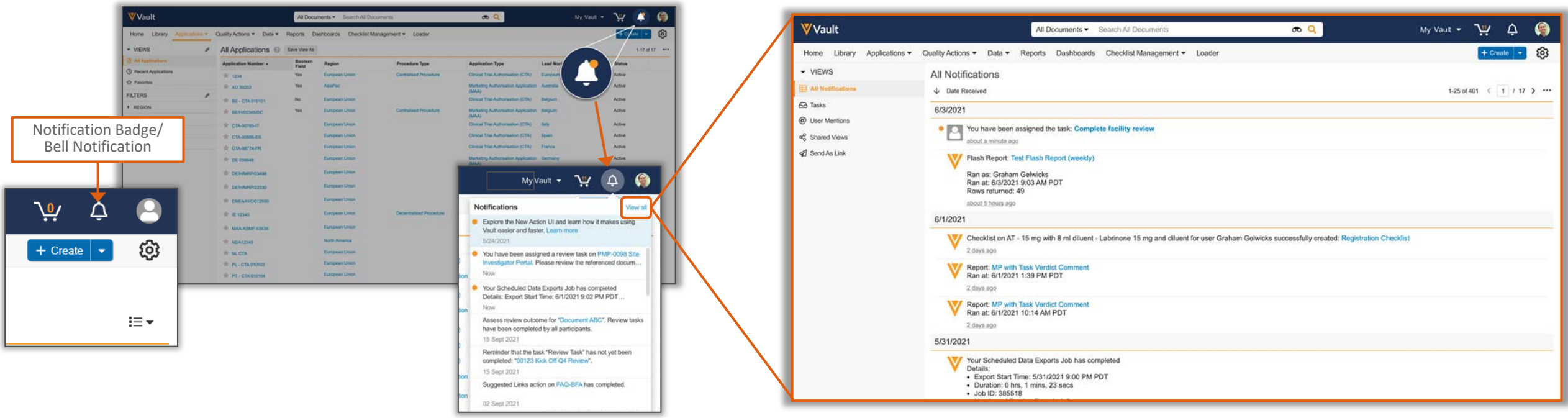
Bell Notification

- A new global notification icon makes it easier for Vault users to become aware of documents, records, and tasks that need their attention
- When users receive a notification, the bell icon in the top right corner of the screen alerts them by displaying an orange notification dot
- This feature introduces a new notification panel and an enhanced notifications page



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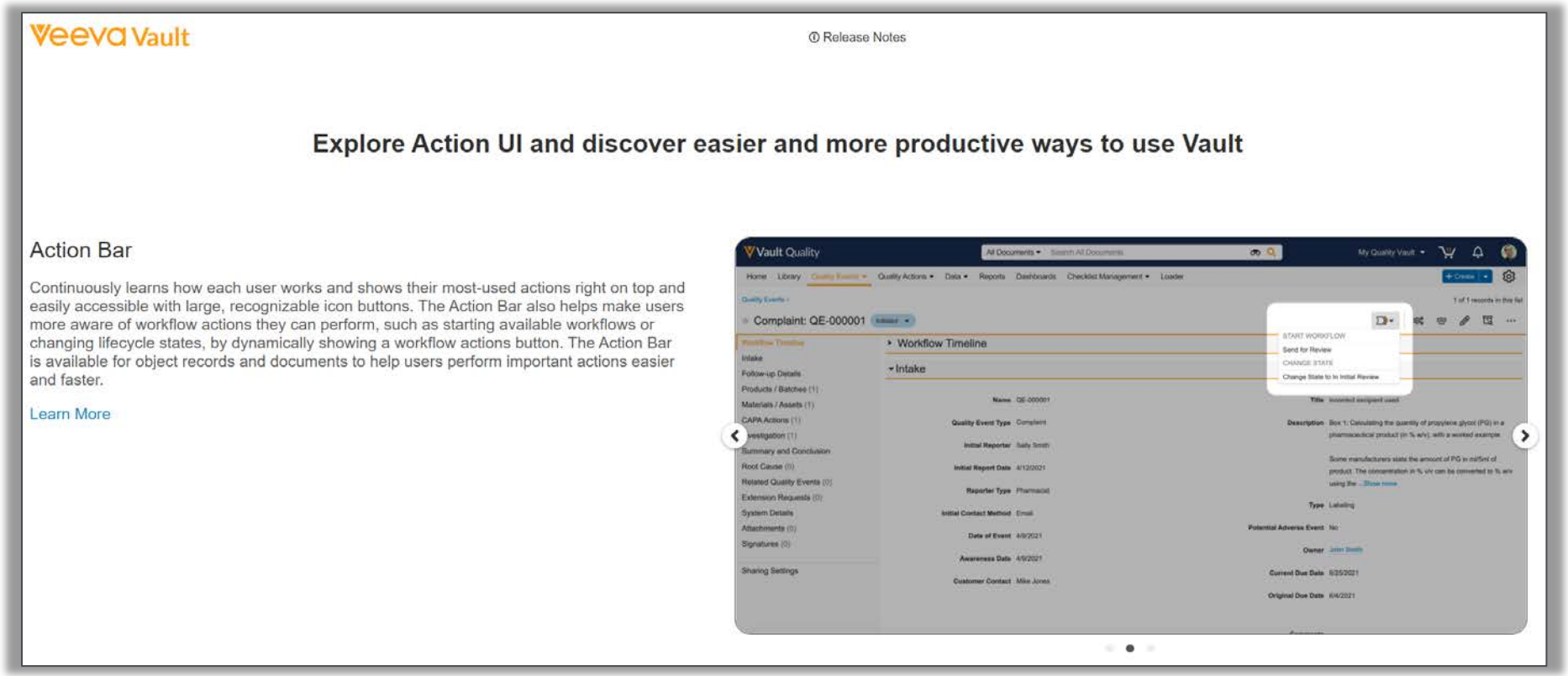
30-Day ‘What’s New’ Notification

- A ‘What’s New’ notification remains pinned at the top of the notification panel for 30 days
- Includes links to Vault Help Release Notes, and screenshots to familiarize users with Action UI
- This page content is controlled by Veeva and only accessible through the new Action UI notifications



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Key Takeaways from Action UI Updates

- Banner colors, spacing, and styling

- Ellipsis icon replaces gear for Actions menu
- New familiar icons with hover help text throughout

- Dedicated menu for Workflows, and new state change option

- Bell notification icon, enhanced notification page, and ‘What’s New’ page
- Familiar Admin panel access

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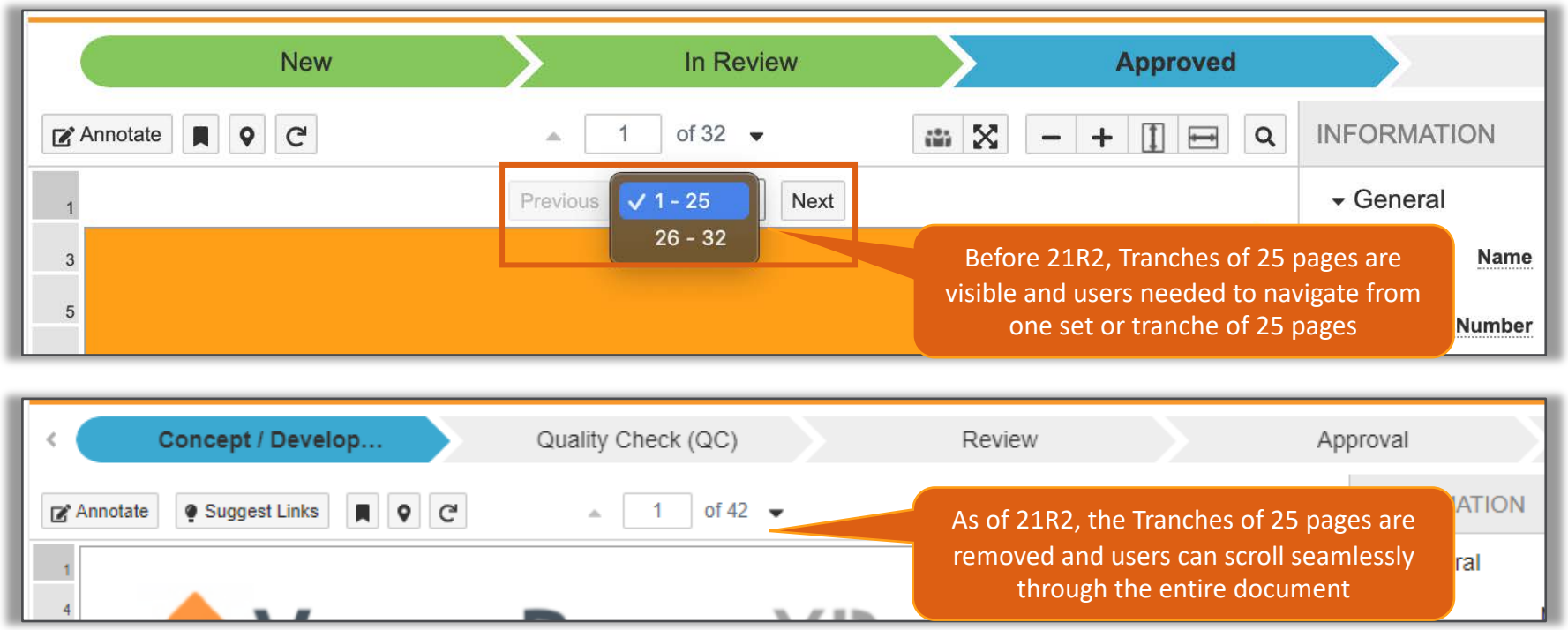
Documents

Infinite Document Scrolling

- Users can now scroll across all document pages seamlessly regardless of page count



- Considerations
  - Note that documents viewed in Internet Explorer™ (IE11) continue to use visible tranche navigation

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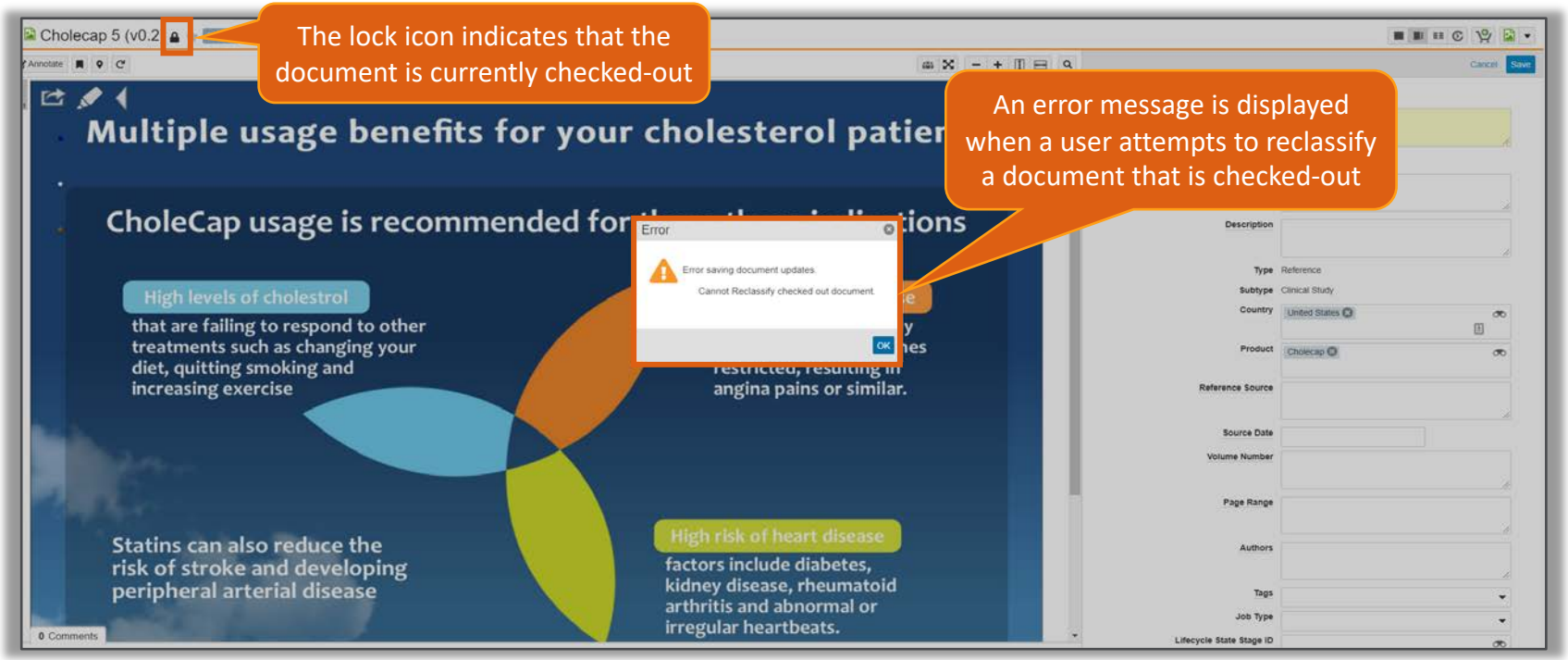
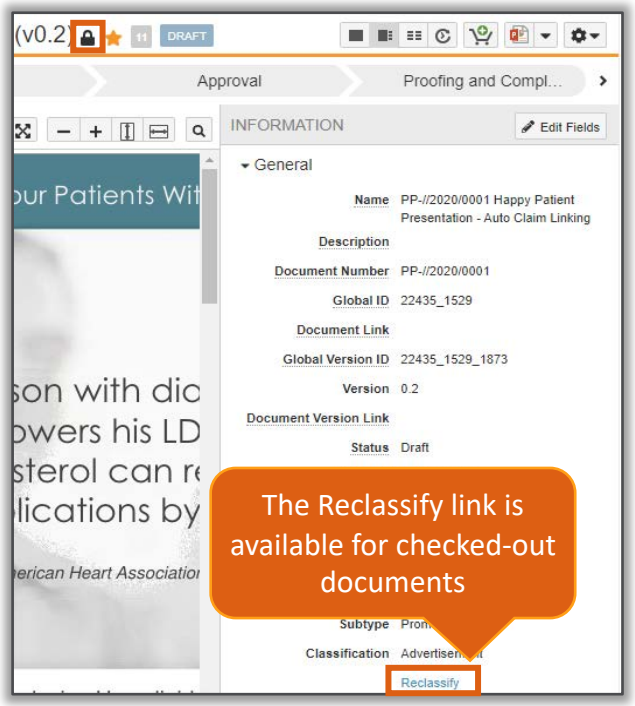
Prevent Reclassify for Checked-Out Documents

- This feature will prohibit checked-out documents from being reclassified while also preventing document field and lifecycle state changes from occurring





- Considerations
  - The Reclassify link will still be visible from the information panel, but if the document is checked-out, Vault will display an error message and prevent the action to be completed

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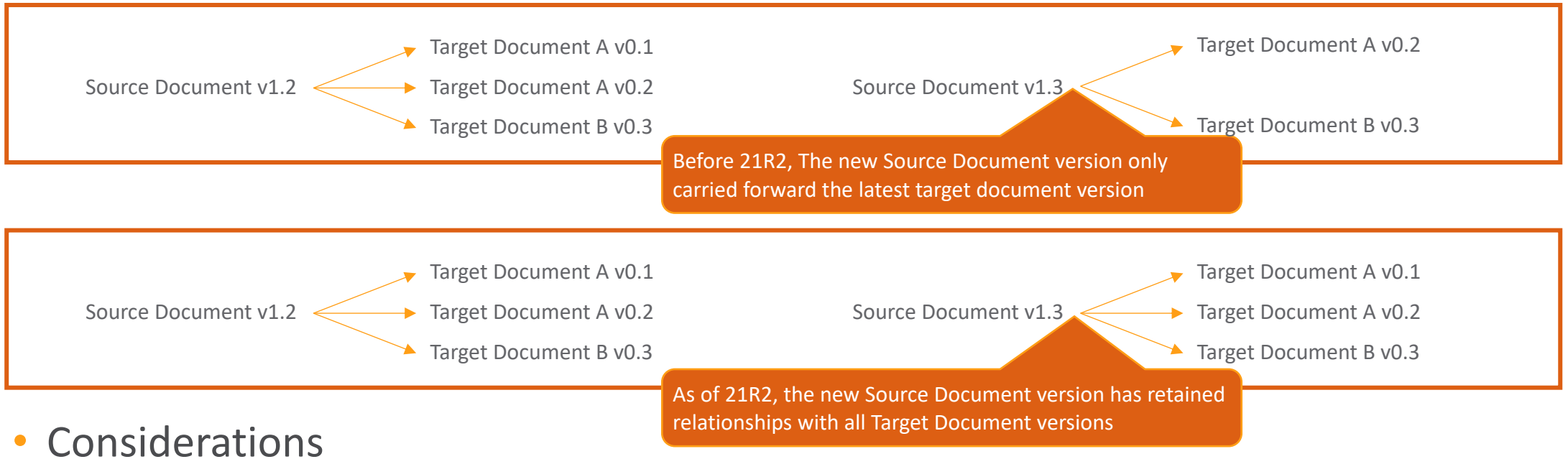
Carry Forward All Document Versions

- Vault can now carry forward relationships with all of the related target document versions when a new source document version is created, rather than only carrying forward the latest version of each target document



- Considerations
  - This change only applies to relationship types where the source and target are version specific, and where the source has Carry Forward enabled
  - Learn more about Document Relationships

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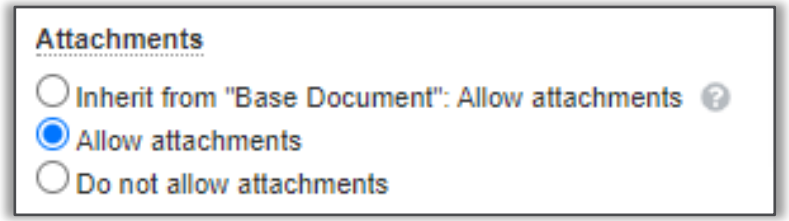
Reclassified Documents Always Retain Attachments

- Vault will now always retain attachments when users reclassify documents
  - If a document has attachments they will always display, even if the document type it is reclassified to does not have attachments enabled

- Considerations
  - The 'Allow attachments' option on Document Types needs to be enabled for users to add new attachments



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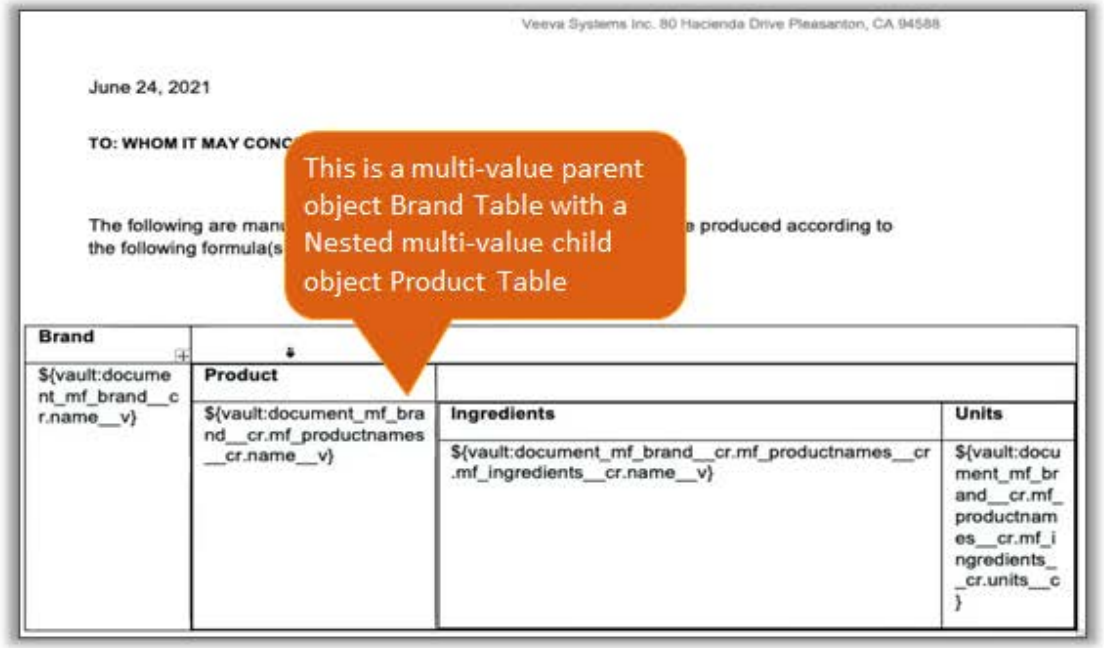
Merge Fields Nested Table Rendering

- Merge fields with repeaters in a table will now only display the data relevant to the object record in a table row within its nested tables



- Considerations
  - A maximum of 1000 total data rows can be displayed within a table
  - Merge fields support 3 levels of tables when using nested repeater tables
  - Can be used in combination with WHERE and ORDER BY clauses in outer and/or nested tables

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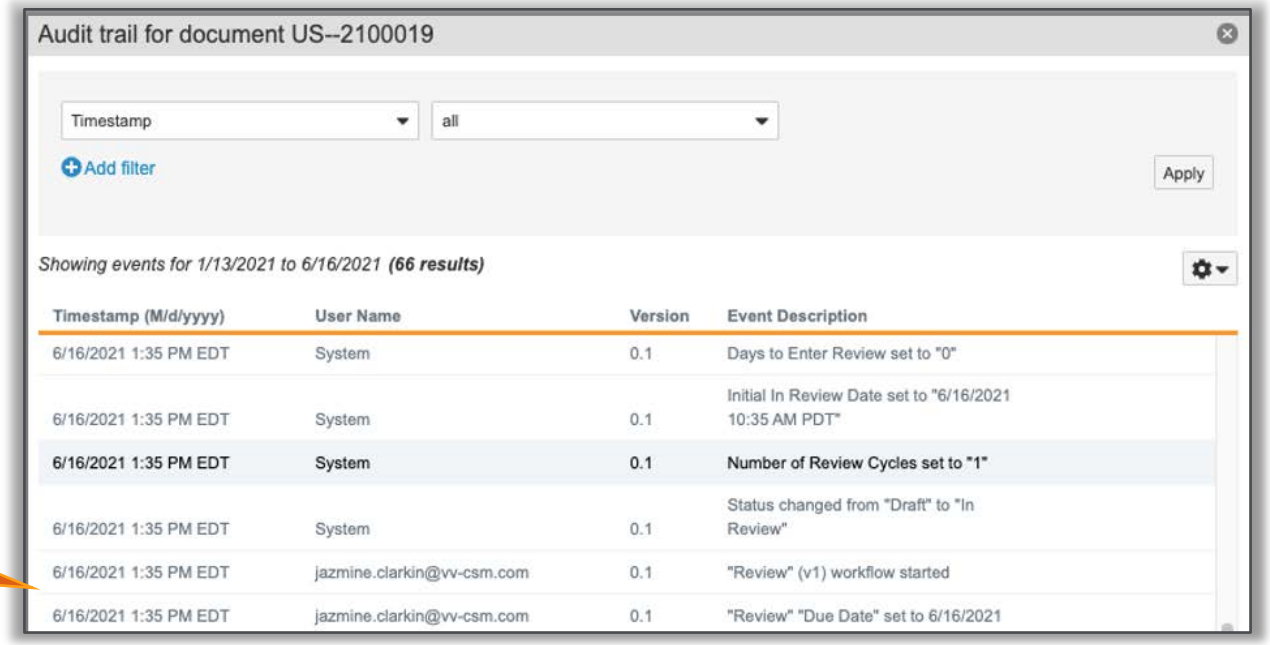
Task Due Date Audit Updates in Document Audit Trail

- This feature adds useful information to the Due Date audit event for object workflows and document workflows
  - If a workflow automatically calculates a due date, it appears in the audit trail as performed by System
  - If the due date is updated by a user using a workflow action, it is listed in the audit trail as performed by a user
  - Each update to a user task due date is captured separately in the audit trail

Audit Trail will display if the Task Due Date was updated by the System or a User



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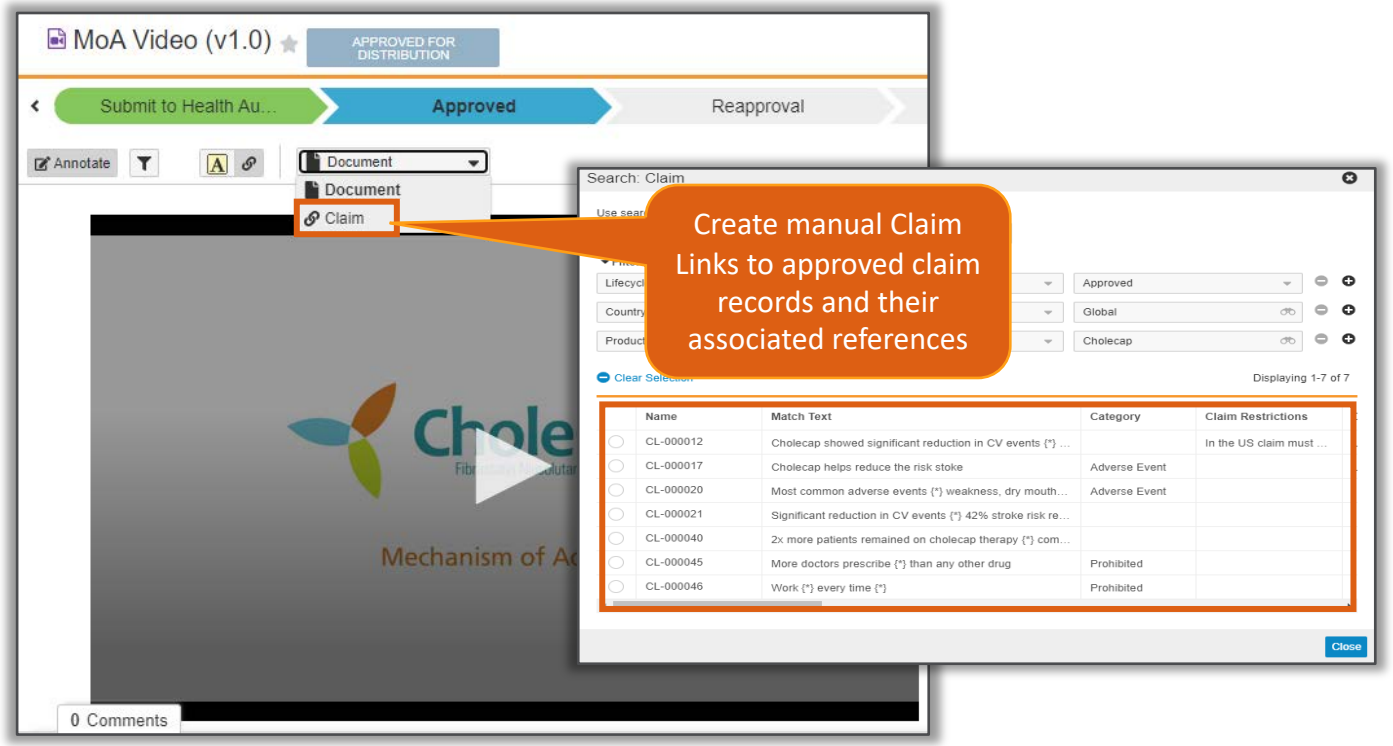
Video Annotation: Claim Links

- Users can now create Claim Links on video documents



- Considerations
  - Suggested Links and Claim Links features must both be enabled
  - Video documents do not support the Suggest Link action Auto Linking since there is no text to match
  - Claims Links annotation work the same way as any other type of annotation in a video (time based)

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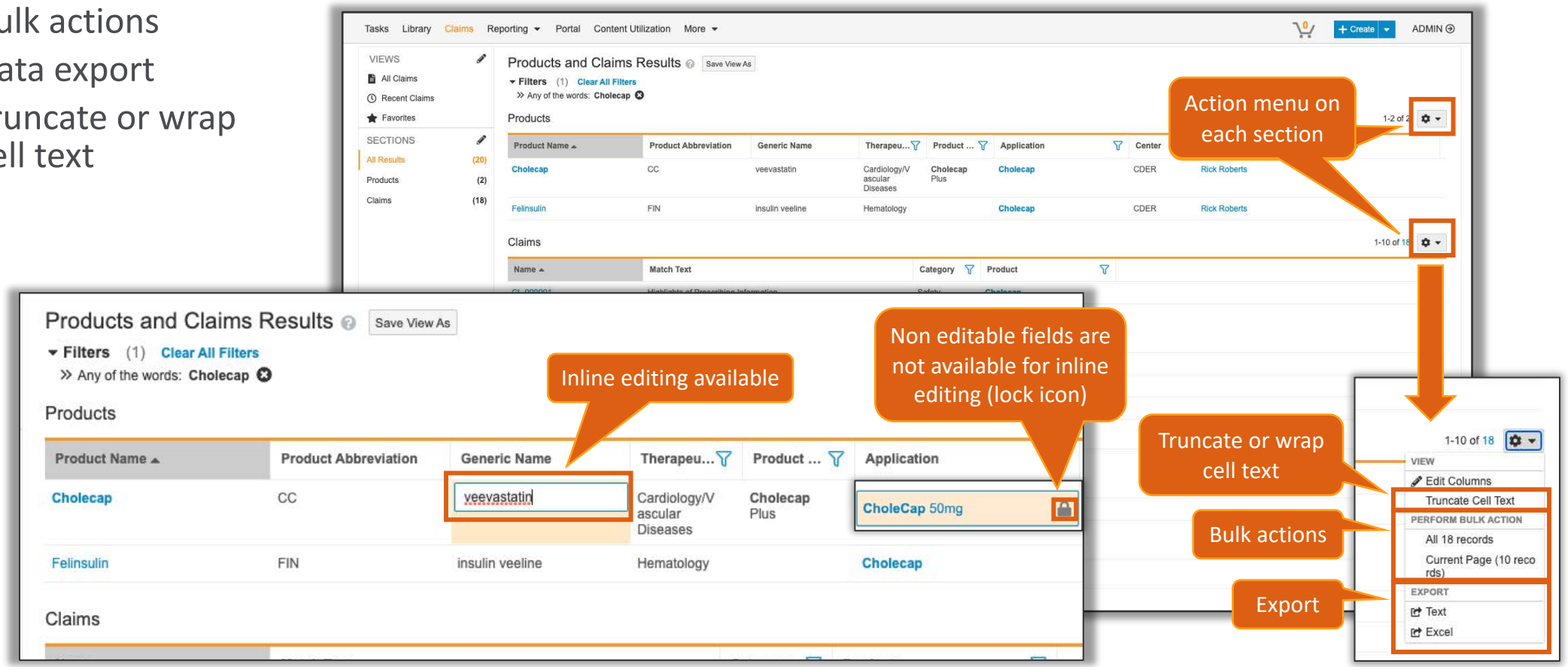
Searching & Filtering

Expanded Search Enhancements

- A collection of new User Interface improvements have been added to the Expanded Search capability in Vault, including:
  - Inline editing
  - Bulk actions
  - Data export
  - Truncate or wrap cell text



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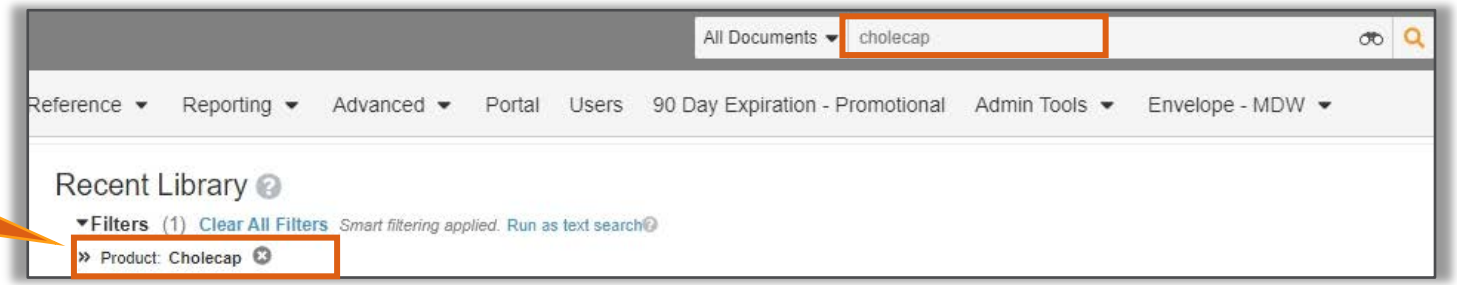
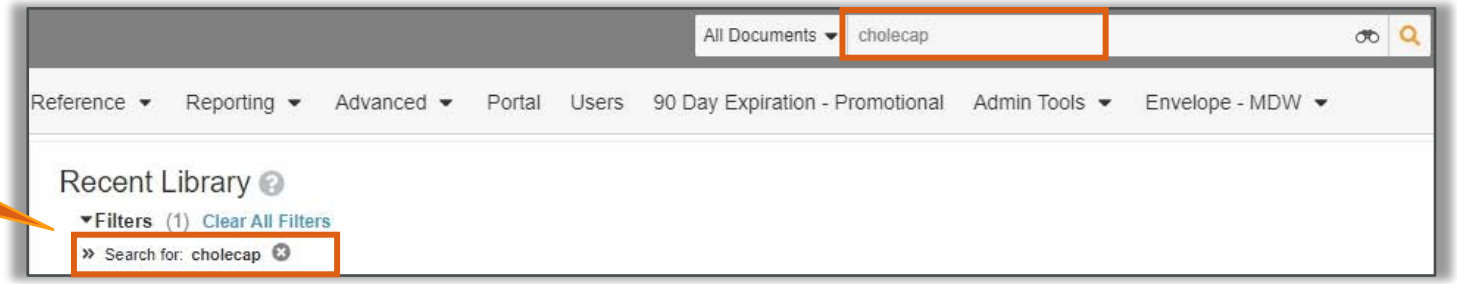
Smart Filter Enablement in Search Settings

- Admin are now able to enable the Smart Filters feature from the Search Setting page

Smart Filters Enabled
- "Cholecap" search term is converted into a Product: Cholecap filter



Smart Filters Disabled
- "Cholecap" search term is run as a standard text search



Smart Filters automatically apply filters to document results when searching for navigational terms like document types, lifecycle states, products or countries

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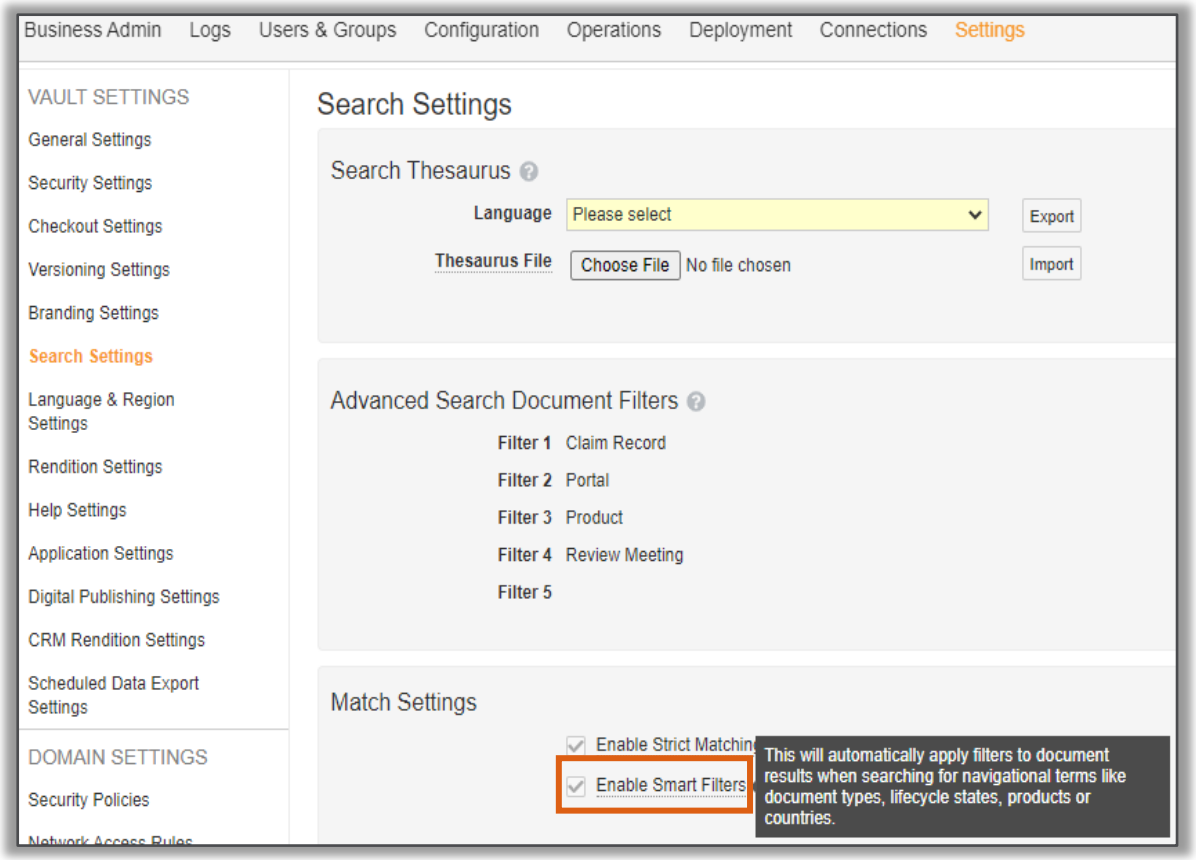
Smart Filter Enablement in Search Settings

- Considerations
  - Smart filtering creates filters for:
    - Document type, Subtype, Classification, Lifecycle state, Product, and Country
- Configuration
  - Admin > Settings > Search Settings > Match Settings > Enable Smart Filters
- Learn more about Smart Filtering



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Reporting

Contains Operator in Reports

- The *contains* operator is now available for Picklist and Object Reference field types on report filters and prompts
- Considerations
  - Long text/rich text, object reference, date/datetime, and boolean fields do not support the *contains* operator
  - Only one *contains* operator may be defined per report
  - Text will be matched as case sensitive
  - Users must enter at least three characters
- Use Case
  - If a user does not remember the exact wording of a text field entry, for example Name and Title fields, the contains operator will allow them to find relevant results by searching with a single word

The Contains operator returns any documents or object records that match any portion of the search string

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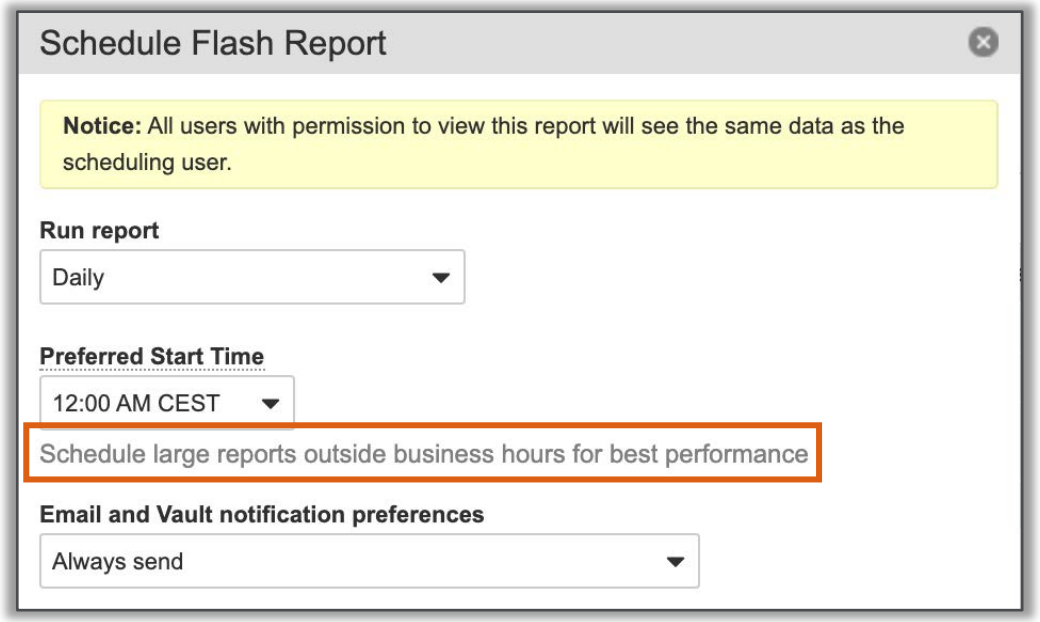
Flash Reports Timeout Behavior

- Vault will now automatically block flash reports that timeout several days in a row
- Considerations
  - A notification will be sent to the report owner
  - Flash report blocking will only occur after the third timeout failure
  - The report owner will need to edit the report definition to unblock the report
  - The flash report schedule dialog will include text advising users to schedule large flash reports outside of business hours



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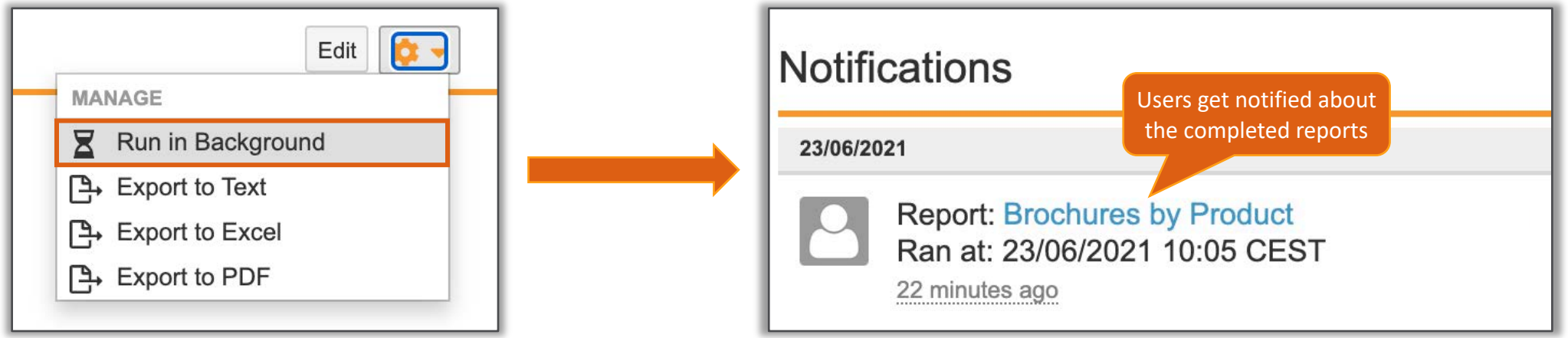
Run Report in Background

- Users can now choose to run reports in the background
- Considerations
  - Users will receive a notification when their report results are ready
  - After user's report executes, the cache for report will preserve it for 24 hours after production
  - User can navigate away/close the tab during the production of the report



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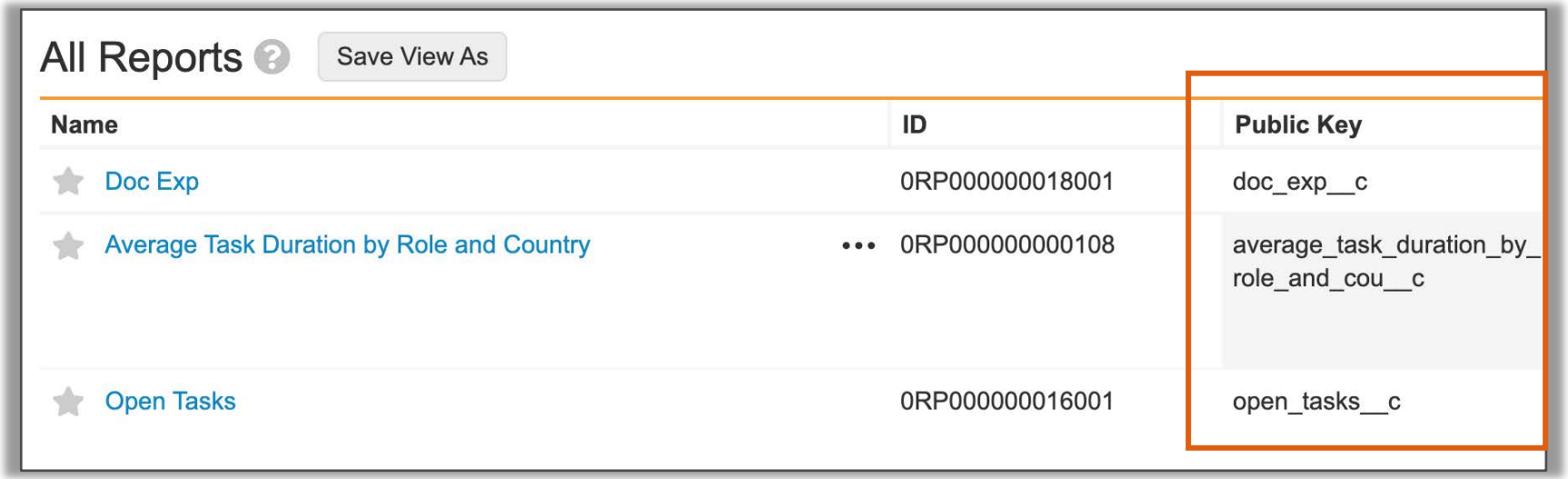
Consistent Report URLs Across Vaults

- Admins can now define web actions for accessing reports using a report's public key, rather than the report ID, allowing reports to be migrated between Vaults (e.g., Sandbox to Production) successfully
- Considerations
  - Users can still access reports through record ID based URLs
    - Record IDs are not consistent across Vaults



Web actions can help improve the reporting experience by allowing users to access reports directly from objects and documents

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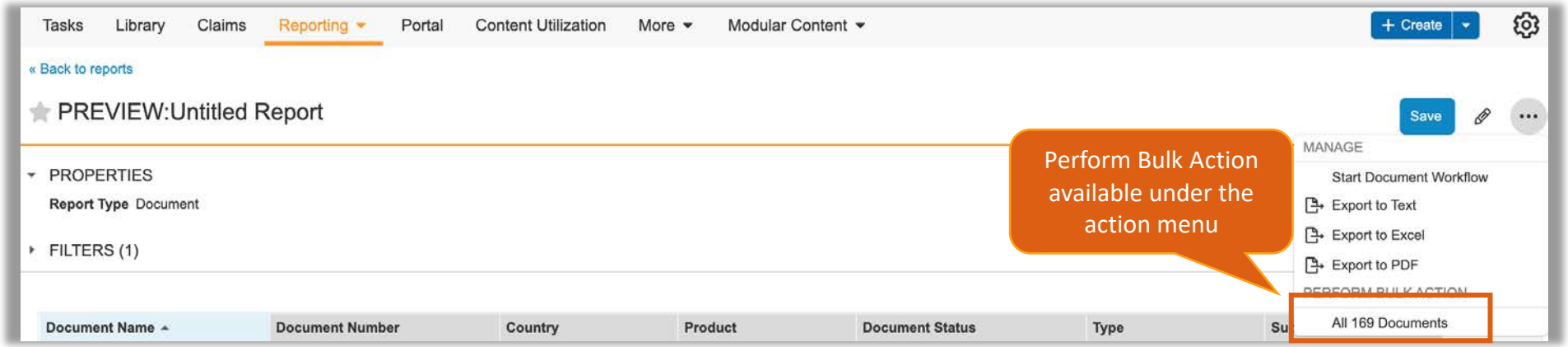
Bulk Actions on Objects in Reports

- Users are now able to perform bulk actions on Object Records and Documents in report results



- Considerations
  - To perform bulk actions on Documents the report results must be grouped
  - Perform bulk action is available in the action menu after the report is executed
  - Reports containing both Objects and Documents will include two actions, one for Documents and one for Objects
  - Object and Document bulk actions are supported on all report types, including multi-pass and workflow reports
  - Users need 'bulk action' permissions to see this action

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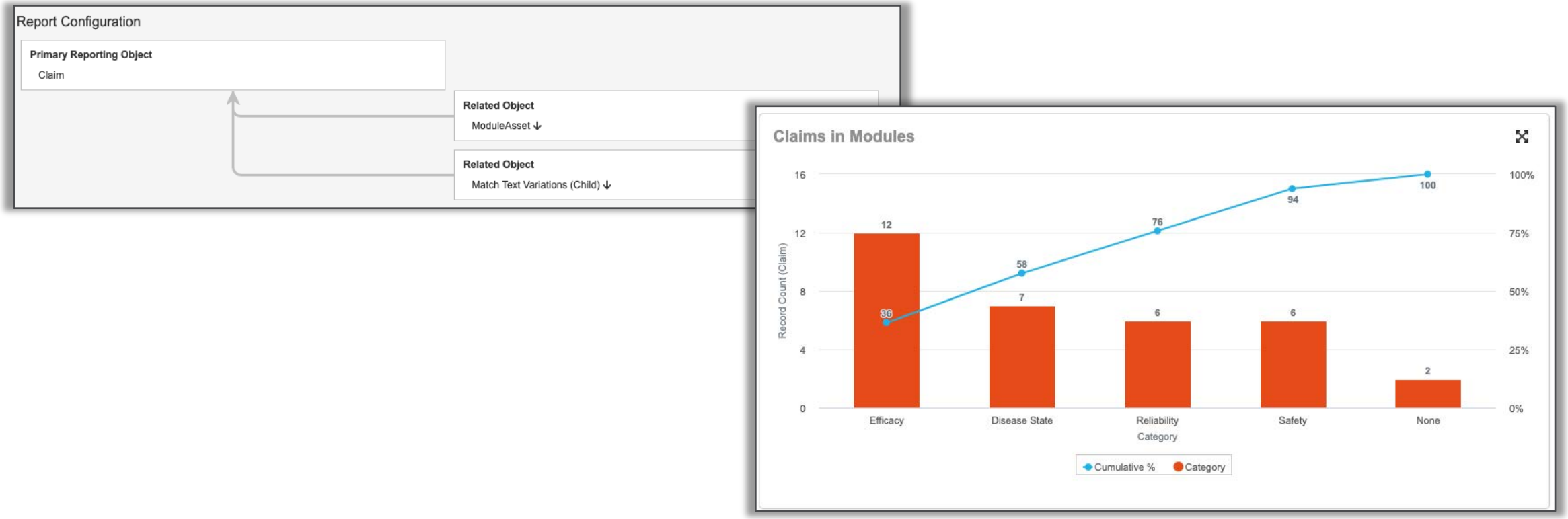
Reports with Multiple Down Objects in Dashboards

- Users are now able to create charts based on reports with multiple down objects that have outbound references to the primary reporting object



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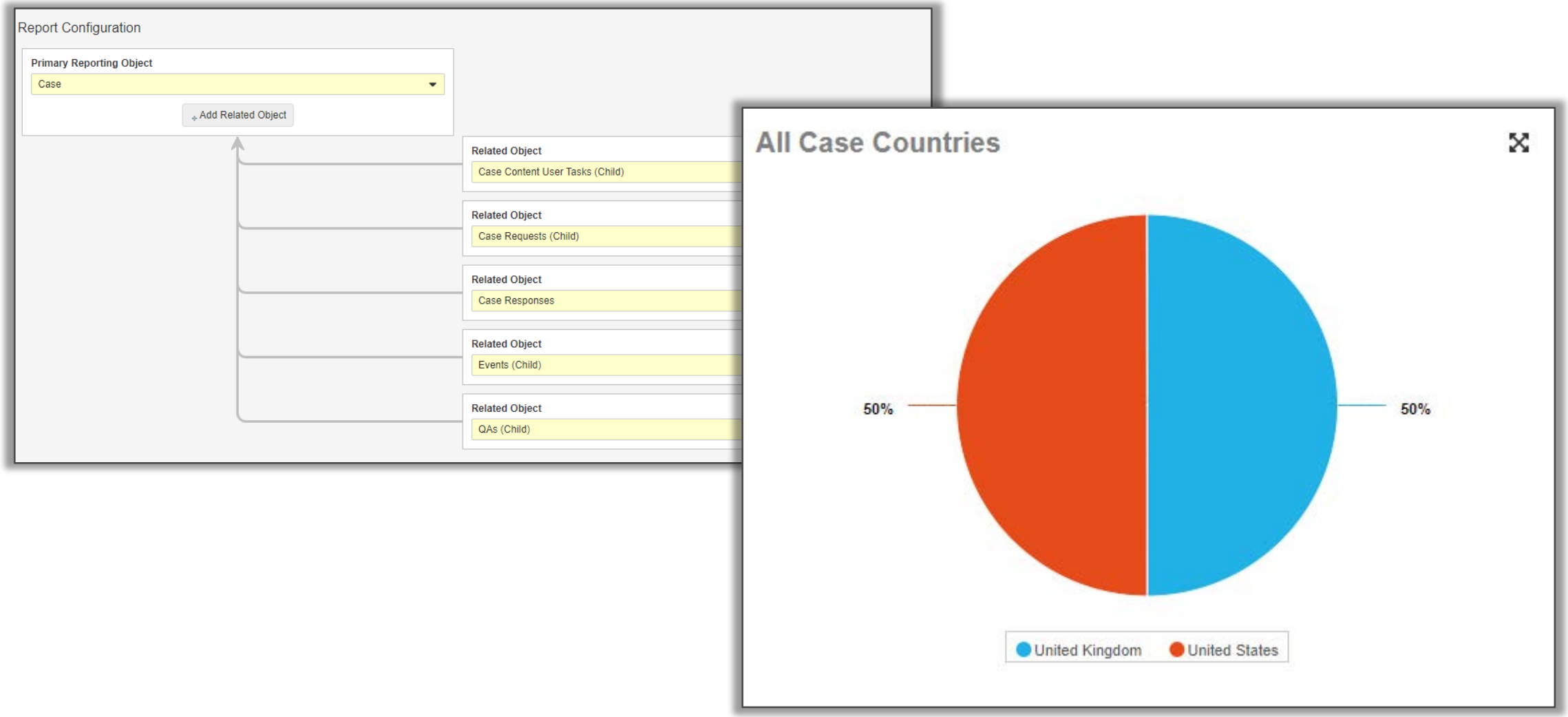
Reports with Multiple Down Objects in Dashboards



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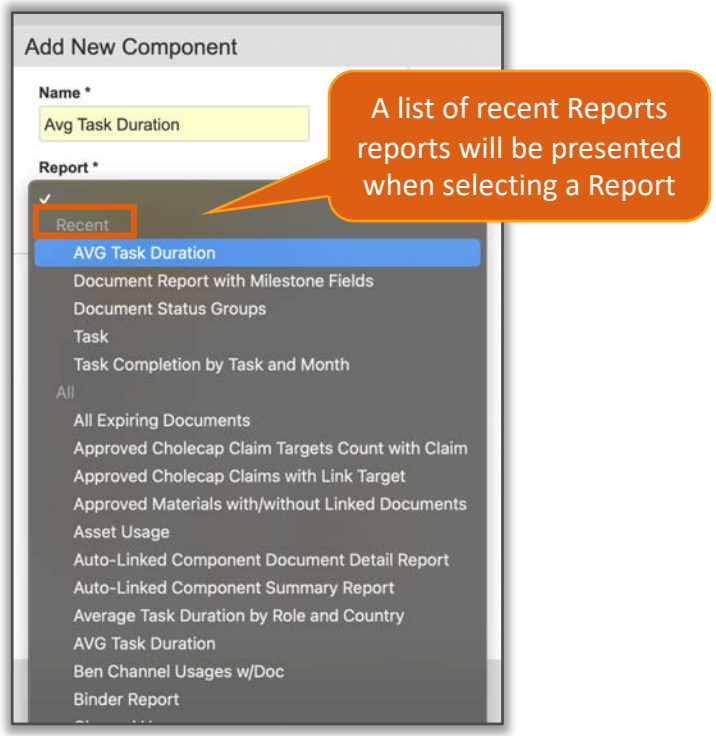
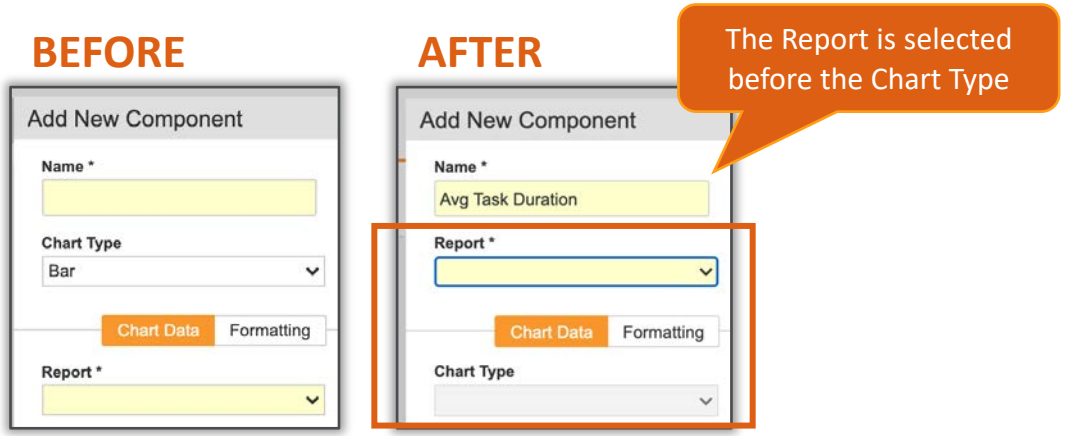
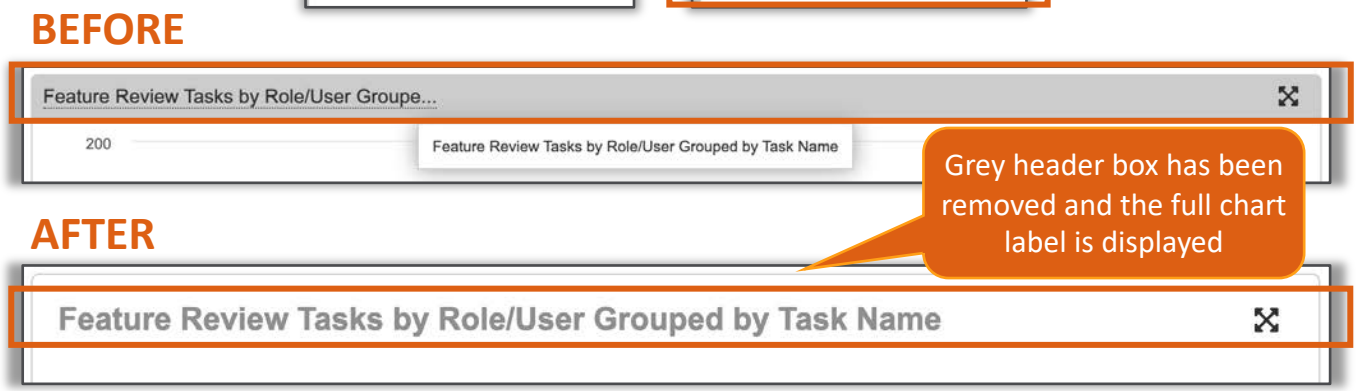
Dashboard Usability Enhancements

- This feature makes several aesthetic and usability enhancements to dashboards
  - A list of recent reports when selecting a report
  - The Report driving the Dashboard will be selected prior to selecting a Chart Type
  - Charts no longer include the grey header background
  - Vault displays full chart labels







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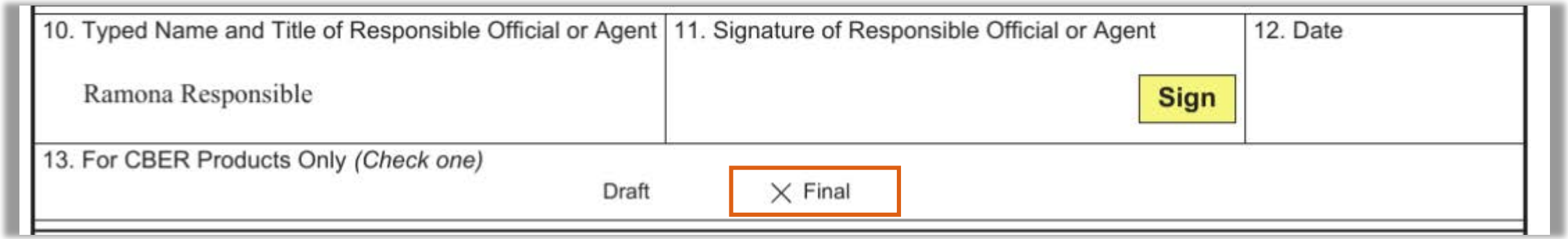
Configurable

eCTD Compliance Package 2253 Form Update

- This feature allows a customer to configure their 2253 form so that the form auto selects *Final* for Post Marketing Compliance Packages where Center = CBER - APLB



10. Typed Name and Title of Responsible Official or Agent	11. Signature of Responsible Official or Agent	12. Date
Ramona Responsible	Sign	
13. For CBER Products Only *(Check one)* Draft	X Final	

- Considerations
  - eCTD Compliance Package feature must be enabled
  - XML elements will need to be updated

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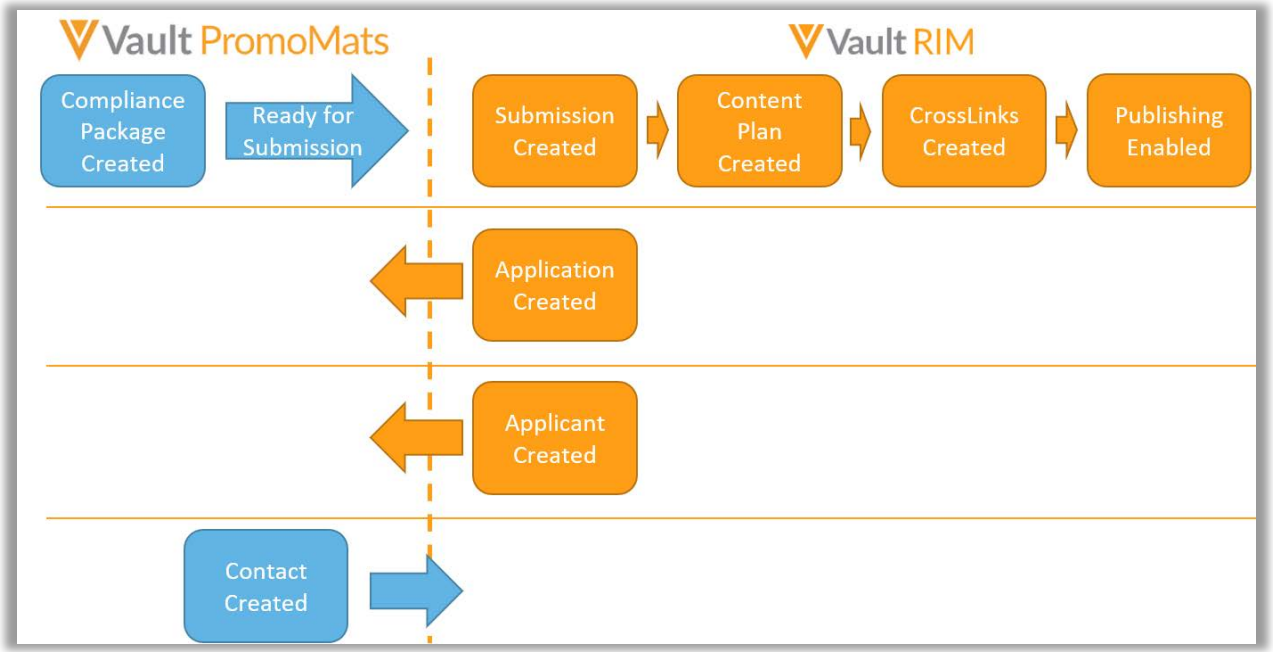
PromoMats – RIM Vault Connector

- PromoMats – RIM Connector for eCTD Submissions to FDA automatically creates:
  - Application, Applicant records in PM
  - Contact & Submission record, content plan, crosslinks, enables continuous publishing in RIM
- Considerations
  - PromoMats must be using the eCTD Compliance Package functionality released in 20R3
  - Vaults must be on the same domain for crosslinking to work
  - Requires a level of configuration, advisable to work with Managed Services or Services to implement



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Material ID

- Material ID provides a unique number per steady state allowing customers to utilize versioning past v1.0 for promotional materials submitted to health authorities
- Available to be used in the Promotional Material ID field in the eCTD binder for use on 2253 form
- Learn more about Configuring the Material ID Document Field (PromoMats)

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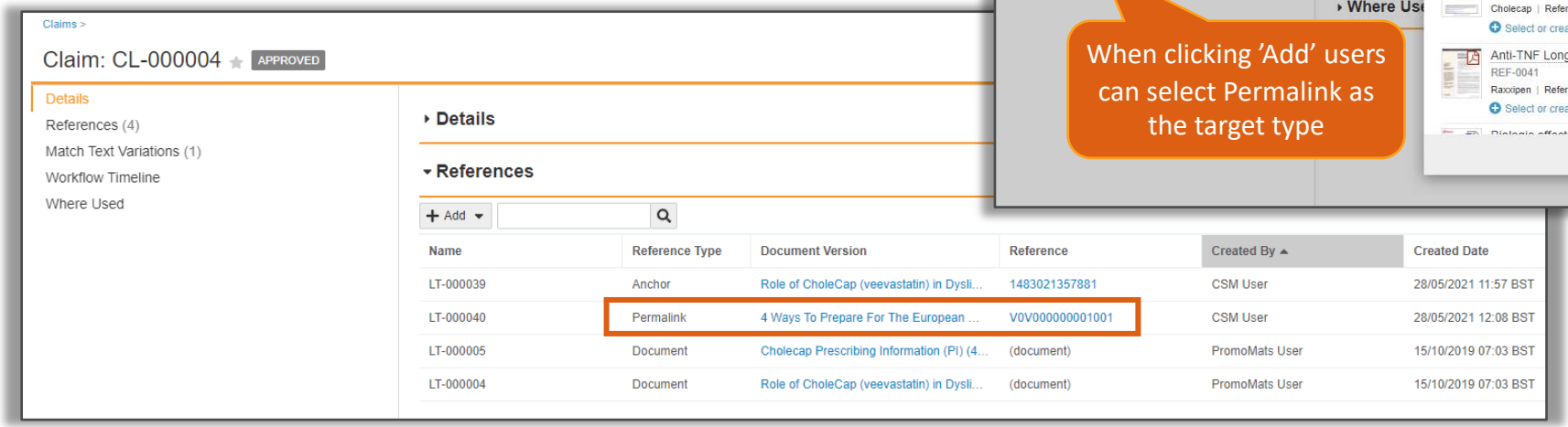
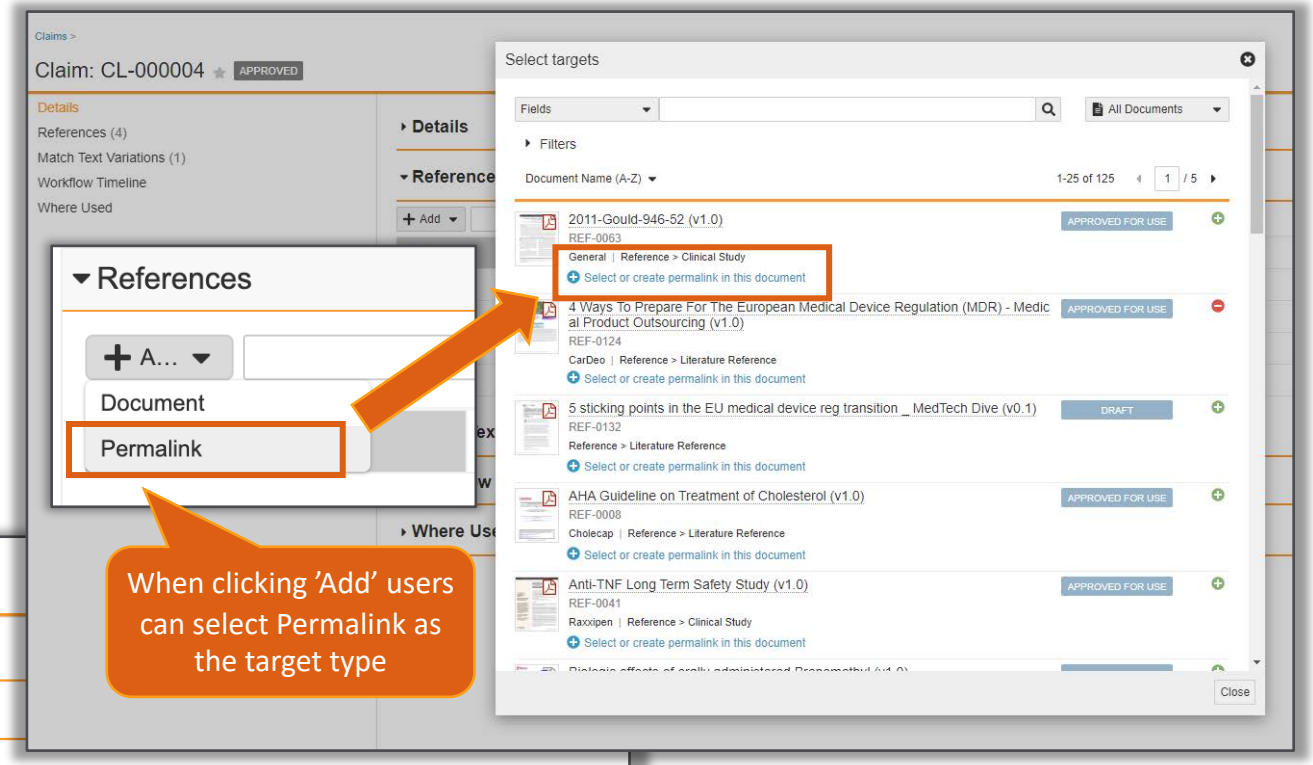
Suggested Links to Permalink Targets

- In addition to version-specific documents and anchors, users will now be able to select a Permalink as the target type when adding a reference (Suggested Links and Auto Links) to a Claim
- Considerations
  - Users can add one or more permalink target
  - The permalink record ID appears in the Reference column within the Claim record's References section
  - This link always navigates to the latest version of the permalink target document





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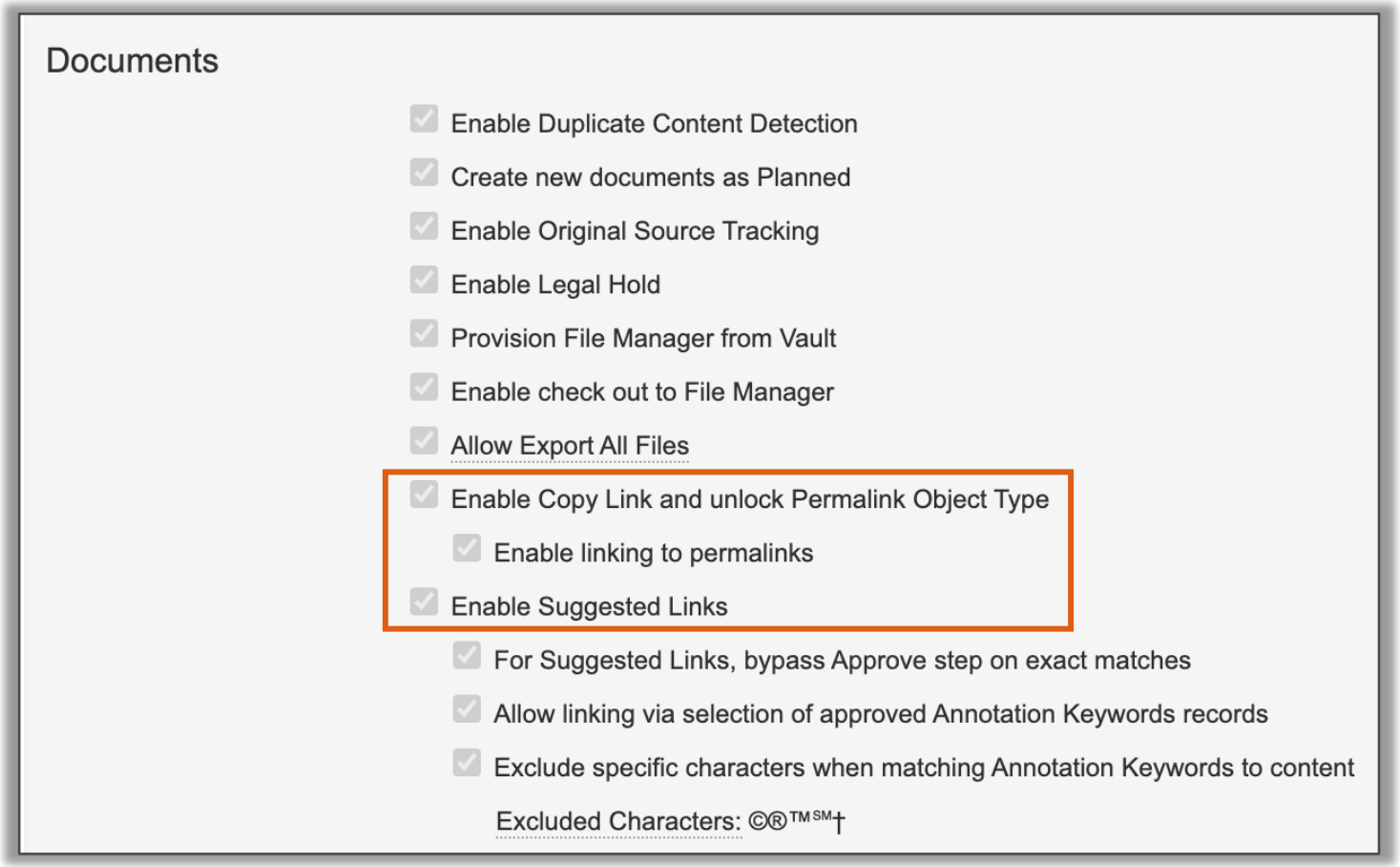
Suggested Links to Permalink Targets

- Configuration
  - Admin > Settings > General Settings >
    - Enable Copy Link and unlock Permalink Object Type
    - Enable linking to permalinks
    - Enable Suggested Links



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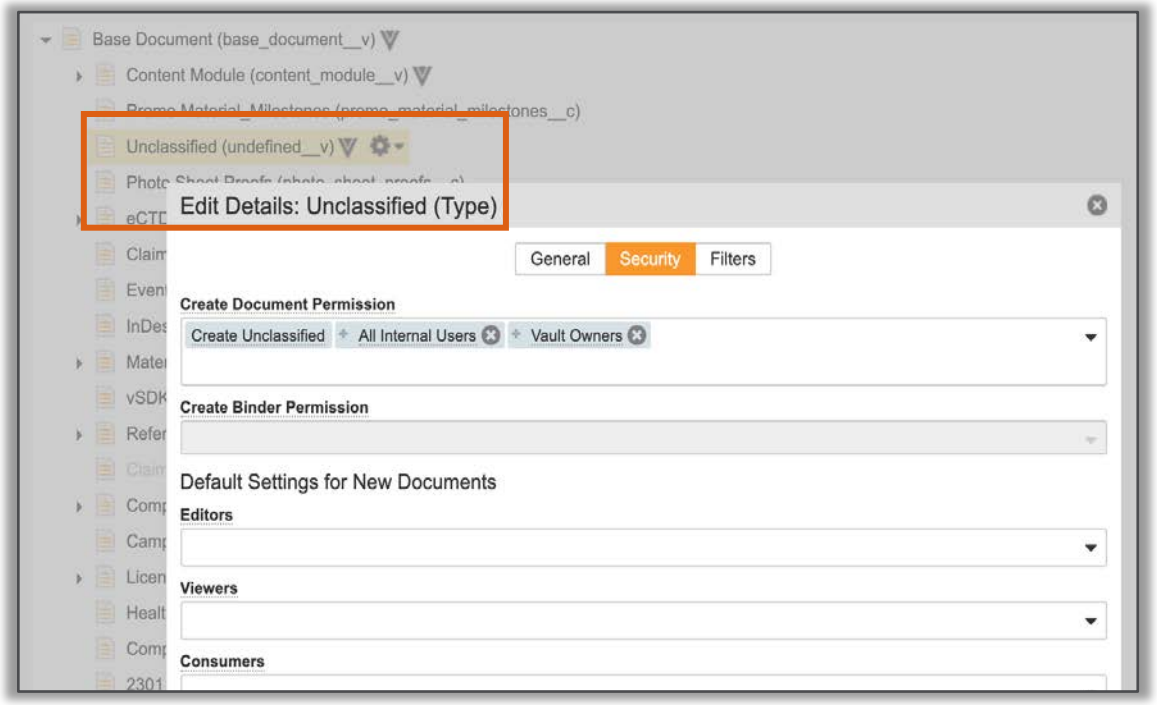
Document Inbox

Unclassified Document Type & Lifecycle Updates

- The Unclassified (*fka* Undefined) doc type will be displayed in Doc Type Admin, allowing Admins to:
  - Assign fields and document type groups
  - Create document permissions
- Considerations
  - In Vaults created after the 21R2 release:
    - The *Undefined* document type will be relabeled to *Unclassified*
    - The *Unclassified* document lifecycle will be relabeled to *Inbox*
  - Vault does not enforce required fields on Unclassified documents
  - All Base Document type fields will appear on the Unclassified document type



We recommend that customers update existing Vault configurations with the new labels

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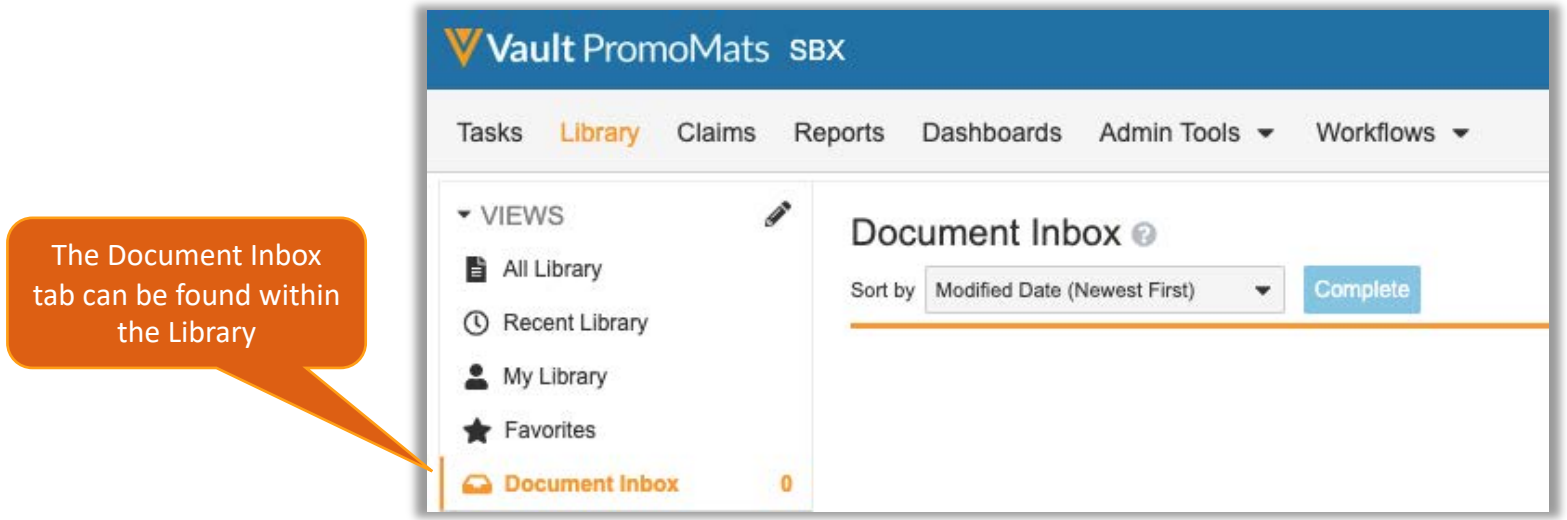
Document Inbox Enhancements

- We have introduced new ways to control who has access to Document Inbox, including a way to control exactly which users can create unclassified documents or see the Classify later option when uploading a new document
  - Users must now have the Create Document permission on the Unclassified document type to drag and drop documents into the Document Inbox
  - Users without the Create Document permission can only view the Document Inbox if they have the View Document permission on a document using the Inbox lifecycle
  - Additionally, documents shown in the Document Inbox are now restricted to those assigned to the Inbox lifecycle



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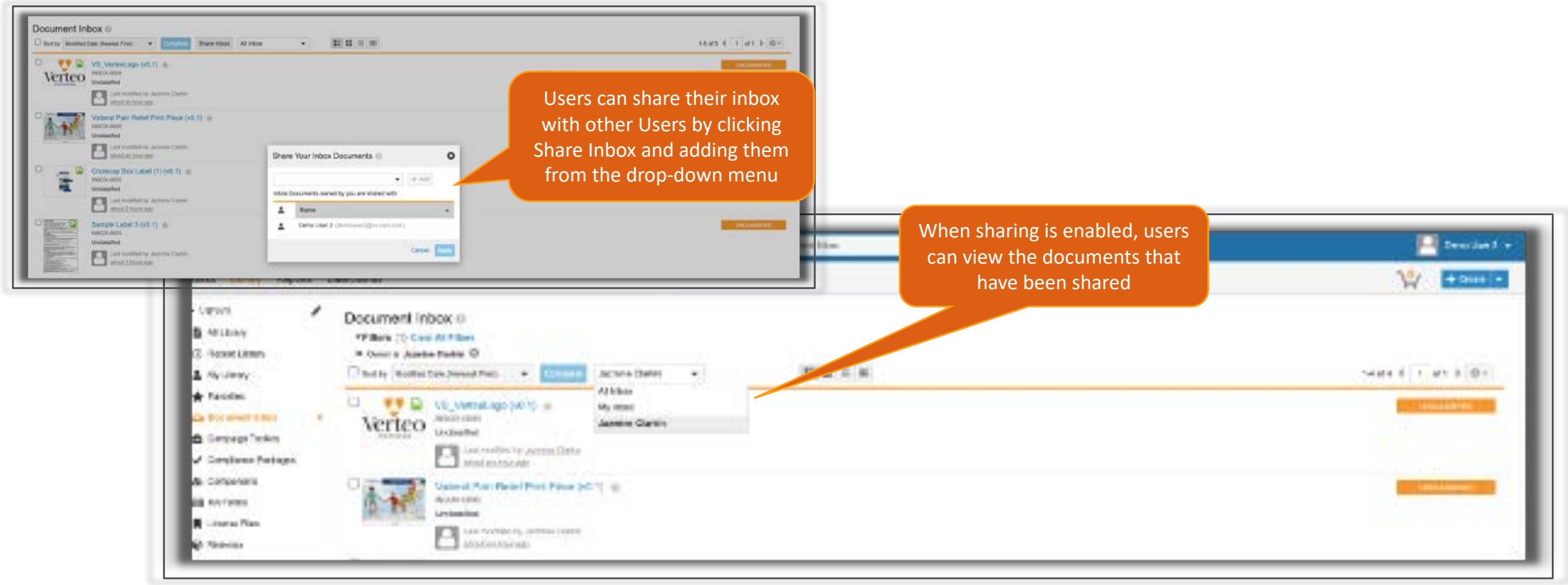
Share My Inbox Documents

- You can now configure your Document Inbox to automatically share Inbox Documents that you are the owner of
  - This applies to both existing Inbox Documents and any new Inbox Documents you create
  - You can share your inbox with select users and groups by clicking the Share Inbox button



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Share My Inbox Documents

- Considerations
  - You cannot share an inbox that has 1,000 or more documents
  - An Admin can enable Inbox Document sharing for you if you need to share more than 1000 documents
  - You cannot share a Document Inbox with more than 50 users or groups
  - When configuring inbox sharing for specific users, Admins can define non-removable users and groups
- Configuration
  - Admin > Users & Groups > Vault Users > [Select User] > Inbox Documents: Sharing > Add

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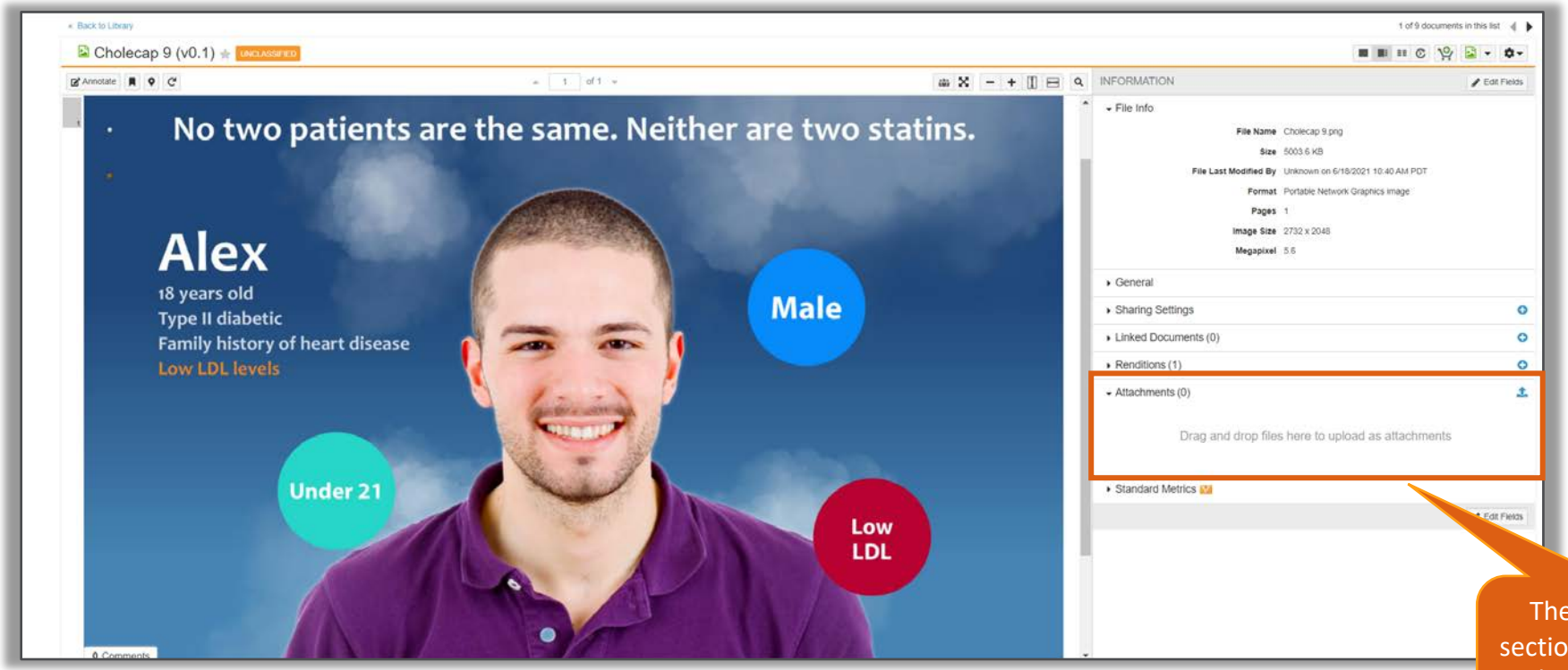
Attachments for Unclassified Documents

- Attachments can now be added to Unclassified Documents *(fka* Undefined*)*



The Attachments section allows for files to be uploaded to an Unclassified document

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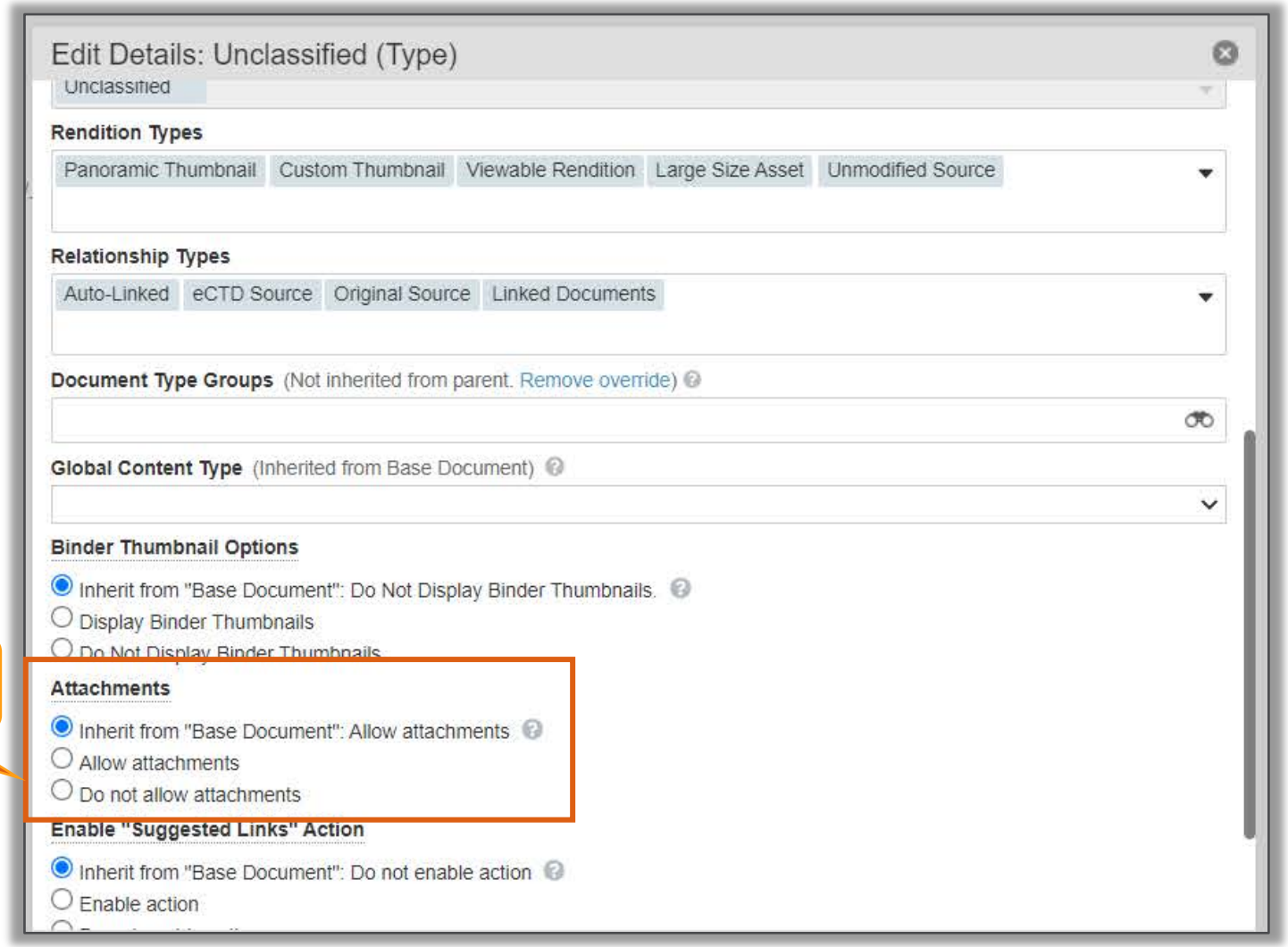
Attachments for Unclassified Documents

- Configuration
  - To enable or disable this feature: Admin > Configuration > Document Types > Unclassified > Attachments Section



Admins can disable the ability to add attachments

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Navigate From Collapsible Upload Modal to Inbox

- Users can navigate back to the Document Inbox from anywhere in Vault via a new button on the collapsible document upload status dialog
  - When users drag and drop a document in the Document Inbox, a small dialog box appears (collapsible upload modal) on the bottom right of the screen
  - This box tracks the progress of the Document upload and provides a link back to the Document Inbox

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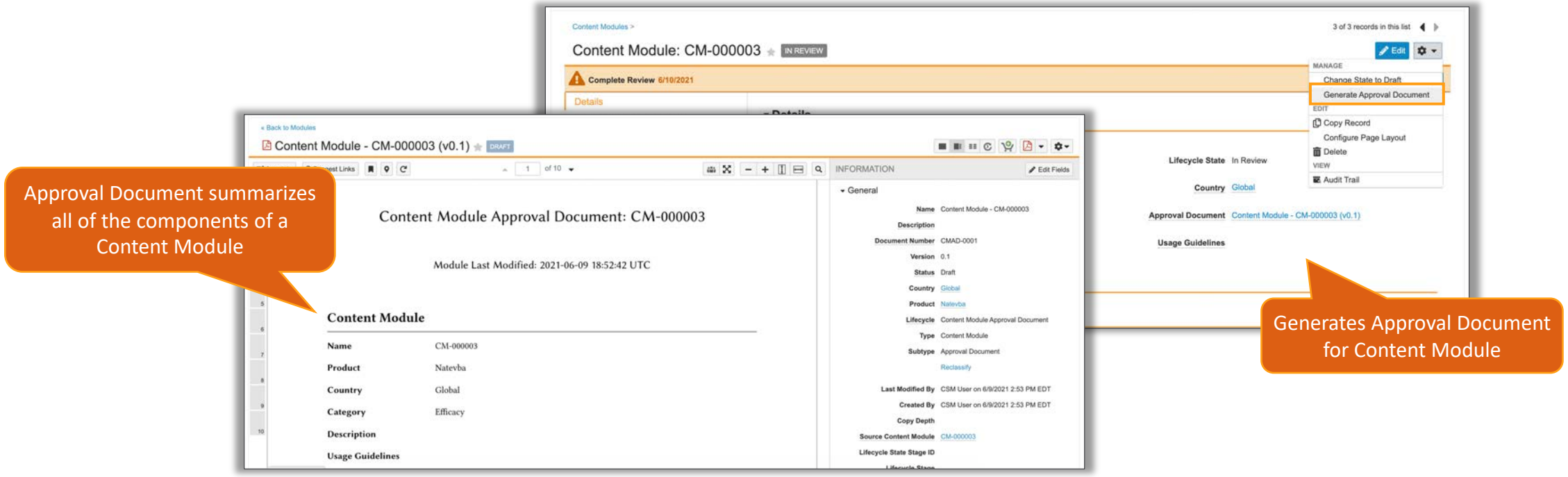
Modular Content

Modular Content: Approval Document

- Vault can now be configured to generate an *Approval Document* as part of the Content Module approval process
  - The Approval Document summarizes the components (claims, assets, text, and rules) in Content Modules into a single readable document that can be reviewed, annotated, and approved



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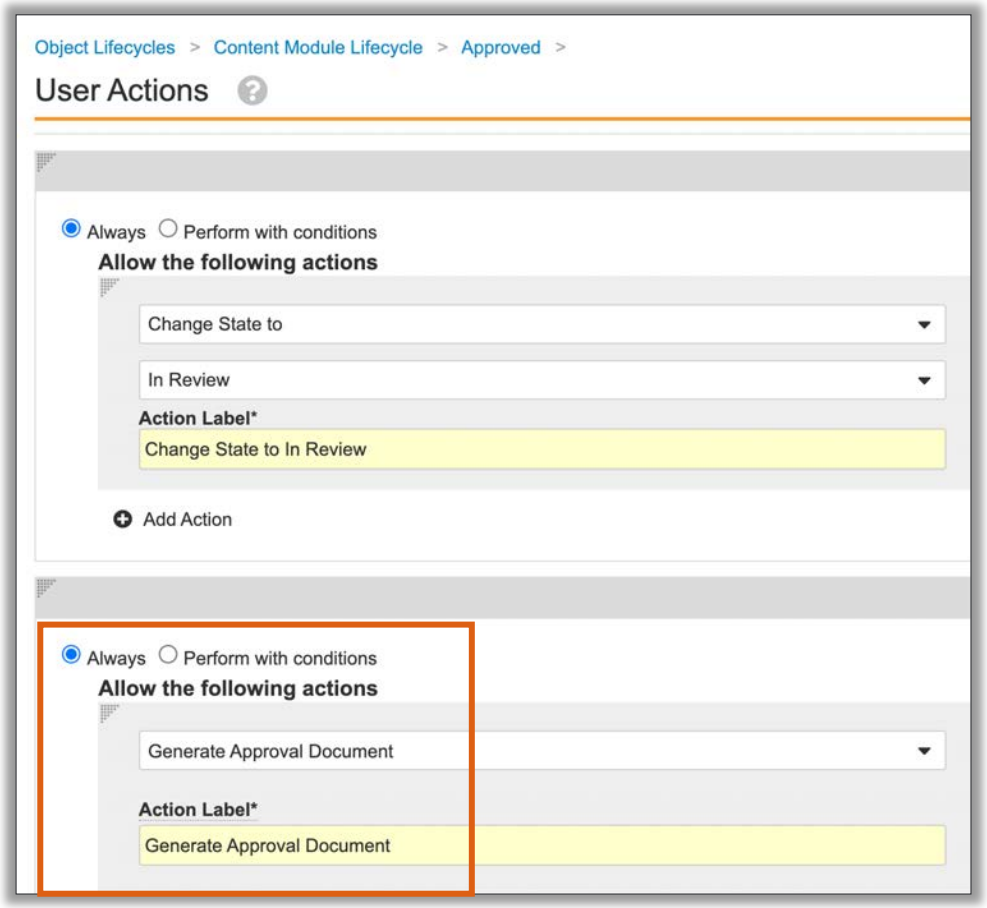
Modular Content: Approval Document

- Configuration
  - Admin > Configuration > Object Lifecycles > Content Module Lifecycle > [State] > User Action
    - Define a new user action using the *Generate Approval Document* action



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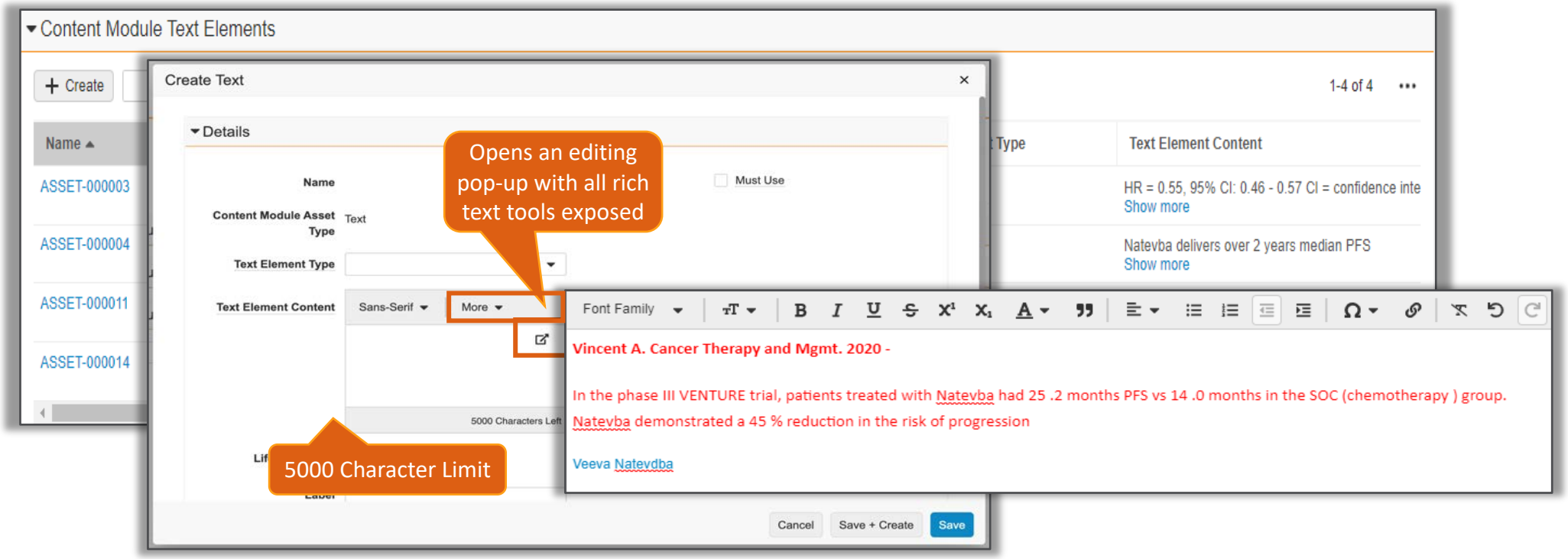
Modular Content: Rich Text Fields

- The Text Element Content field has been updated to a Rich Text field from a plain text field, which provides basic formatting options and the ability to create links to external websites and emails
- Considerations
  - The existing data stored in the plain fields are unaffected
  - Simple and rich text will be accessible through the API



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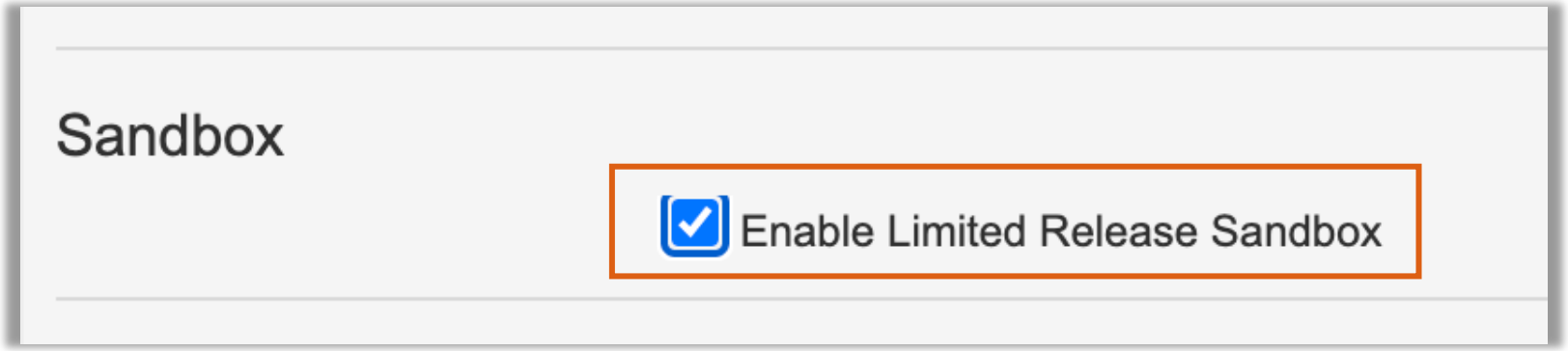
Admin

Limited Release Sandbox Feature Flag

- Vault Admins can now enable the Limited Release Sandbox feature without contacting Veeva Support
- Considerations
  - Each Limited Release sandbox counts towards the 3 configuration sandboxes allowed per production Vault
- Configuration
  - Admin > Settings > General Settings > Sandbox



The Limited Release Sandbox feature allows organizations with General Release Vaults to create a Limited Release sandbox, giving them the ability to proactively assess new functionality ahead of each General Release

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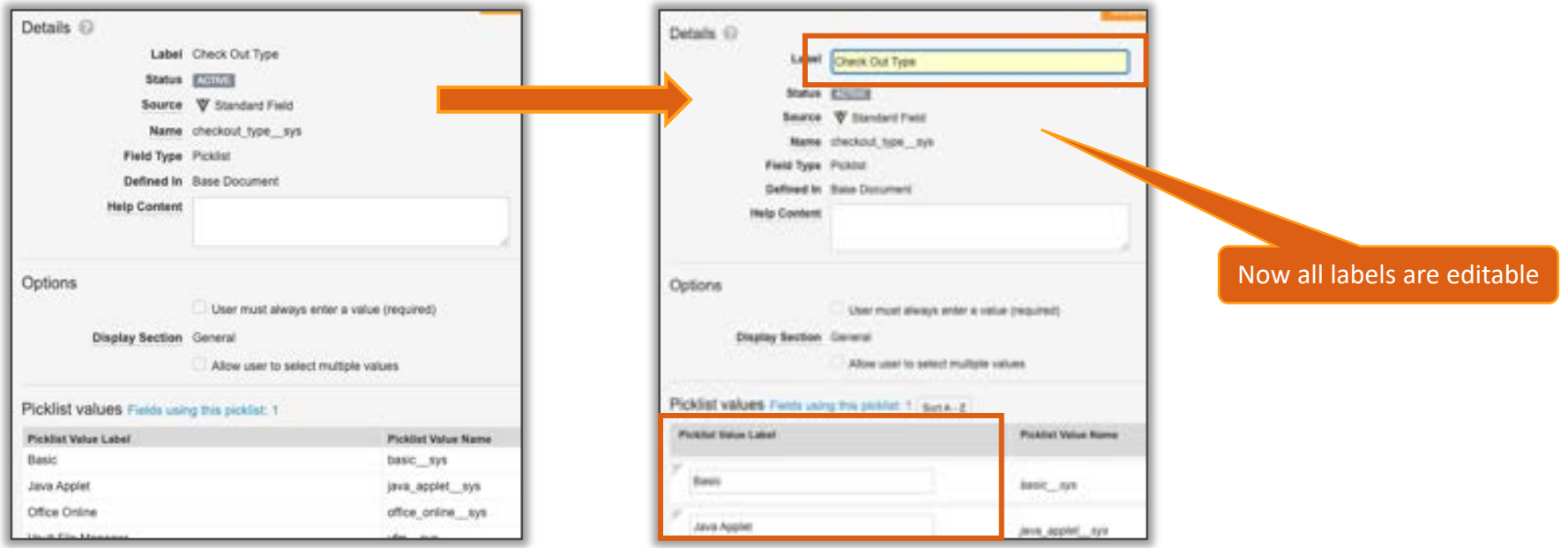
Admins Can Edit All Labels (Document and Picklist)

- Standard document (__v) field and picklist labels (main label and value labels) are editable through the admin UI
  - Any picklist label can be changed in the Business Admin or Document Fields page



- Considerations
  - In previous releases, Admins could not edit the labels on all standard (__v) picklists and picklist values, even though this was possible via MDL and the bulk translation tools in Vault.
  - Once picklist labels are updated, verify that the configuration of field dependencies that use picklists have updated labels

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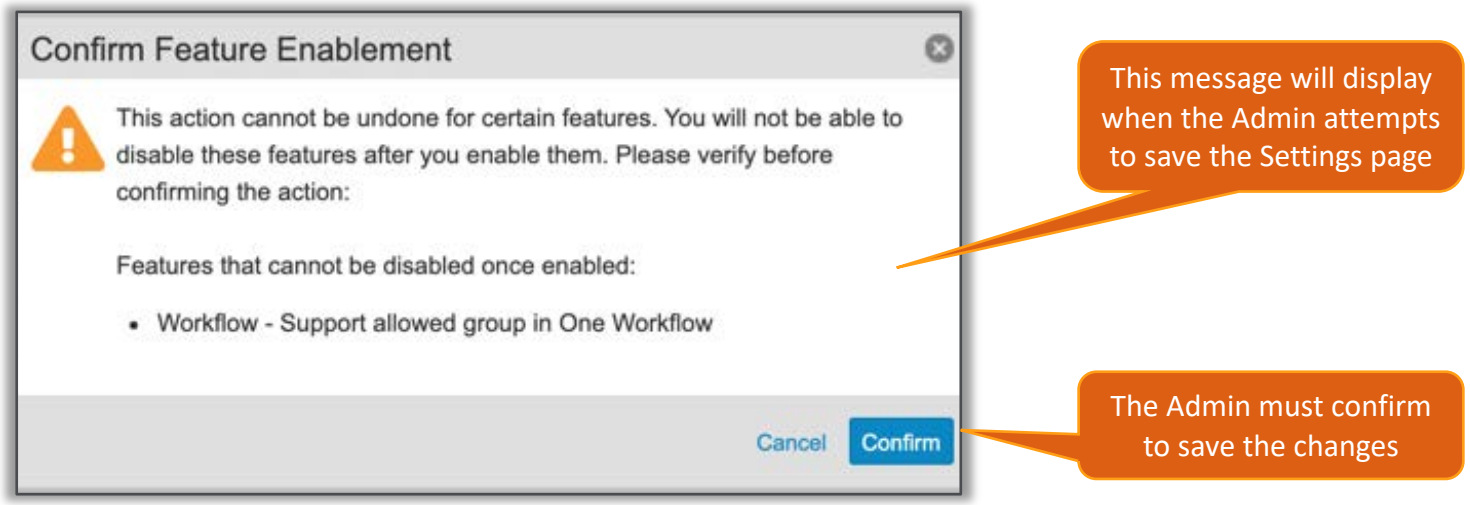
Feature Flag Confirmation Dialog in Vault

- A confirmation message now displays on the Settings page when a Vault Admin enables a feature that cannot be disabled once enabled



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Notifications: Support for Vault Mobile Push Notifications

- Infrastructure is now in place for Vault to send push notifications to iOS and Android mobile devices
  - Initially supporting document workflow task push notifications to Vault Mobile
  - New section "Mobile App Registrations" on the user profile page and admin user page
- Considerations
  - Mobile App Registrations will appear by default, but Admins can hide it
  - Push notifications are a best practice for notifying mobile users of tasks
- Use Case
  - Vault Mobile allows to complete tasks on-the-go

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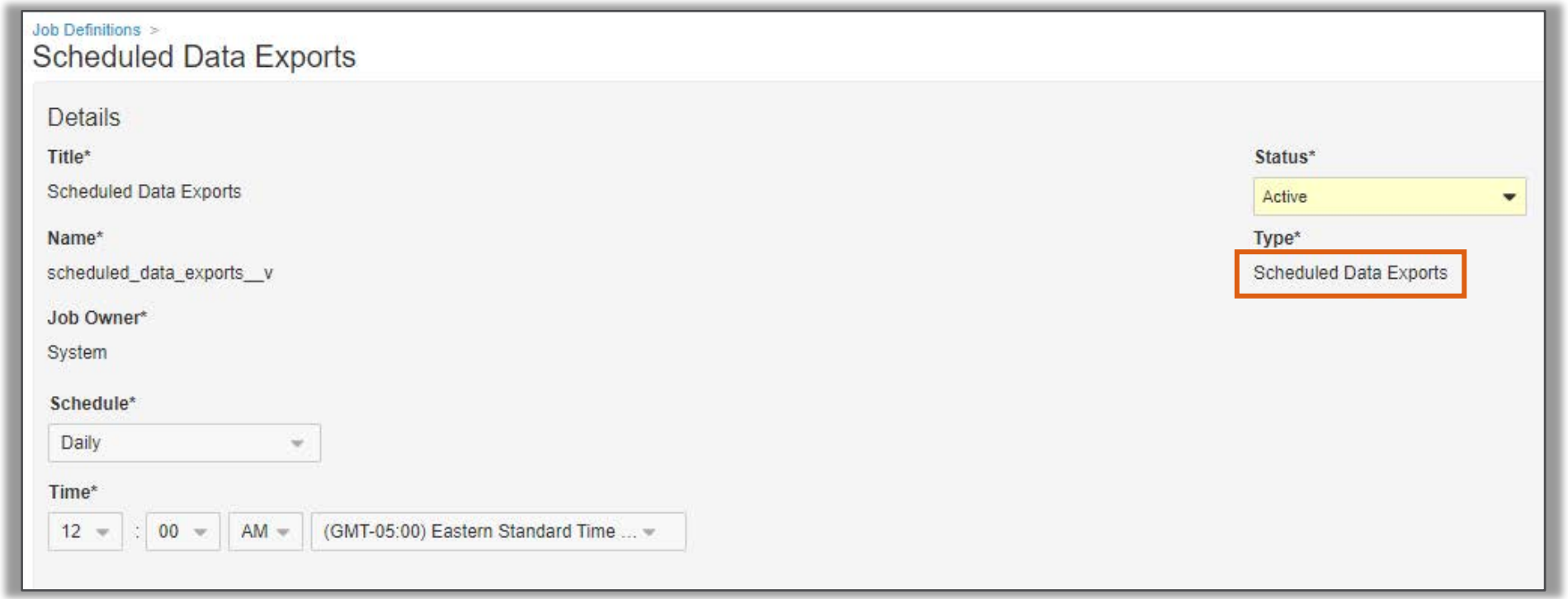
Scheduled Data Export

- A new Job has been added to the Operations section in Vault that extracts select object and document metadata, on a daily basis, directly to Vault File Staging FTP or their Amazon S3 Bucket
  - Scheduled Data Exports support customers using Data Warehouses for analytical purposes



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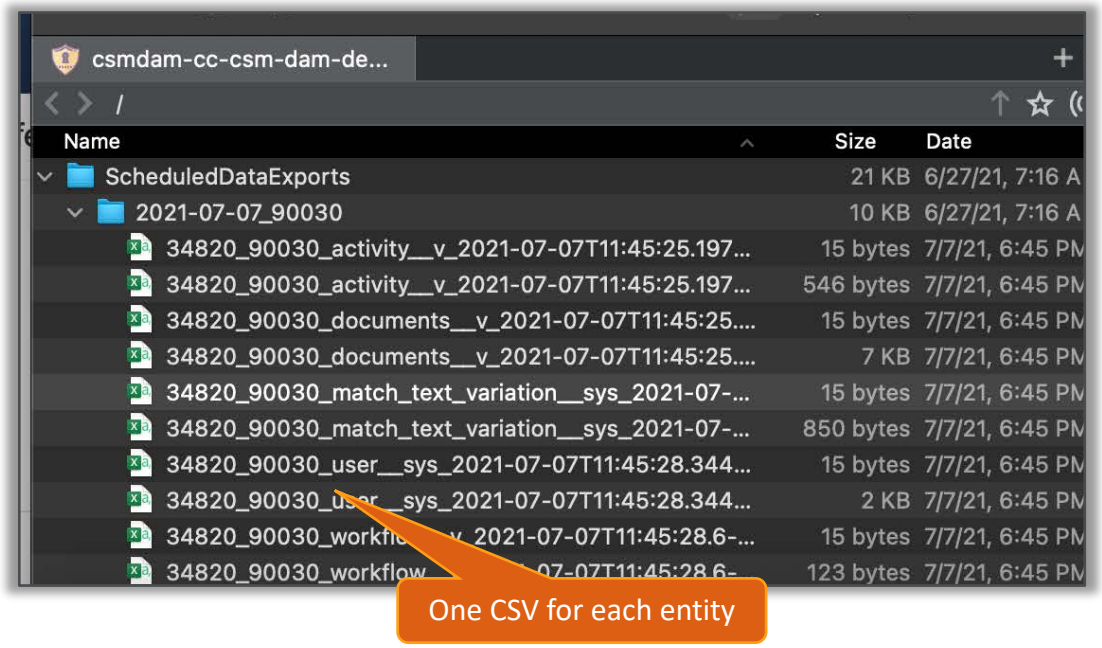
Scheduled Data Export

- Considerations
  - The job is inactive by default
    - Admin must activate and complete the configuration
  - Job scheduled to run at midnight based on your Vault's time zone
    - Only data that has changed in the last day is included in the export
    - Vault exports extracted data to a CSV file
    - All columns are exported
    - Maximum export limit of 10 million records per entity
  - The person who updates the job definition becomes the job owner
    - Entities are limited to the data the Job Owner can view
    - User requires Read, Write and Delete access to the AWS S3 Bucket
  - Customers can only have one export per Vault
  - Vault removes files placed on the Vault File Staging FTP after the FTP File Staging Retention time expires



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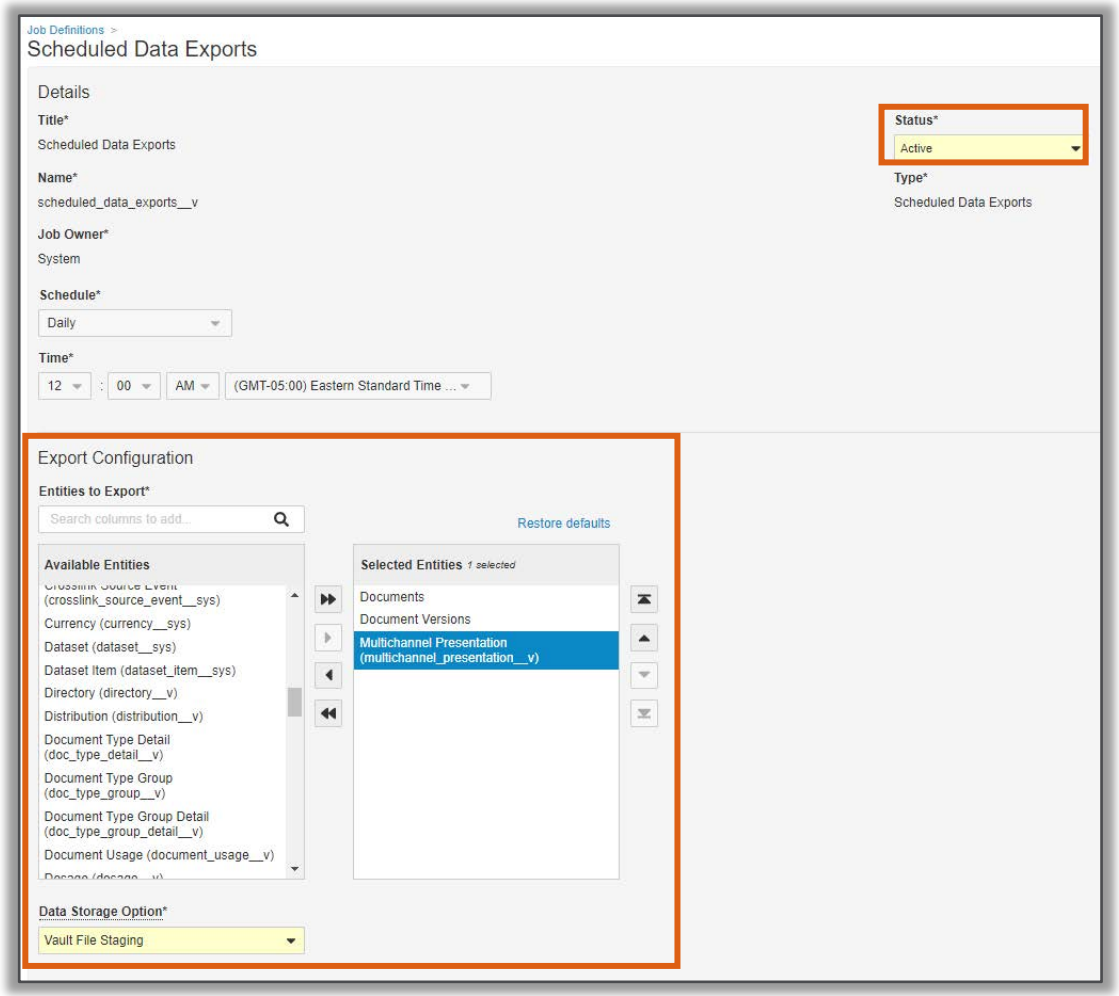
Scheduled Data Export

- Use Case
  - Makes the maintenance of Data Lakes / Data Warehouses simpler for customers who wish to undertake analytics on data from Vault
- Configuration
  - Admin > Operations > Job Definitions > Scheduled Data Exports
    - Make Active
    - Select Entities to Export
    - Select Data Storage Option



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Automate Guest Invites to Azure AD from Vault

- When using Collaborative Authoring Vault can automatically add external users as guests to your Azure AD domain
  - This action is enabled the “Edit” button is clicked to start or join a collaborative authoring session

- Considerations
  - External users will need to accept the invitation automatically emailed to them
  - An invitation sends if Vault determines they are not yet in your company’s Azure Active Directory
  - This flag is disabled by default
  - Admin feature flag must be enabled and re-authorization with Microsoft is required
- Use Case
  - Saves time for Admins who manage the access of external users who are often vendors and have frequent staffing turnover or reassignments

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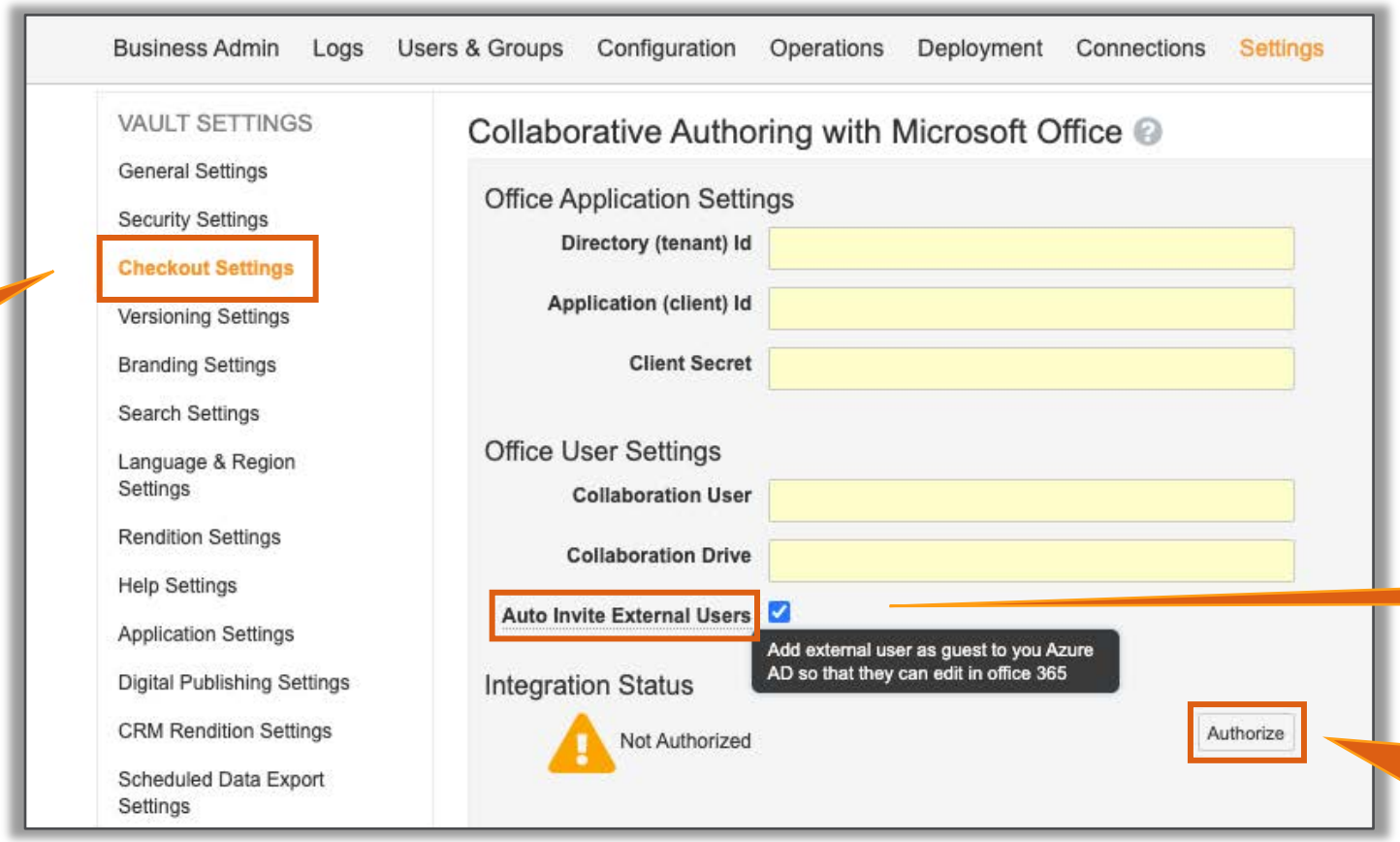
Automate Guest Invites to Azure AD from Vault

- Configuration
  - Admin > Settings > Checkout Settings

Navigate to Checkout Settings



Enable flag here

Once feature flag is enabled, re-authorization with Microsoft is required

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Renditions for RTF Files

- Vault now supports viewable renditions for Rich Text Format file types (RTF)
  - RTF files capture information about font styles, formatting, images, and more
- Considerations
  - Files will be rendered up to a maximum of 512 mb
  - Merge fields, Dynamic Linking, and other Rendering settings for MS Word are not supported for RTF renditions
  - A new icon will be added to Vault to distinguish RTF files

- Use Case
  - RTF files are required by Health Authorities in submission packages

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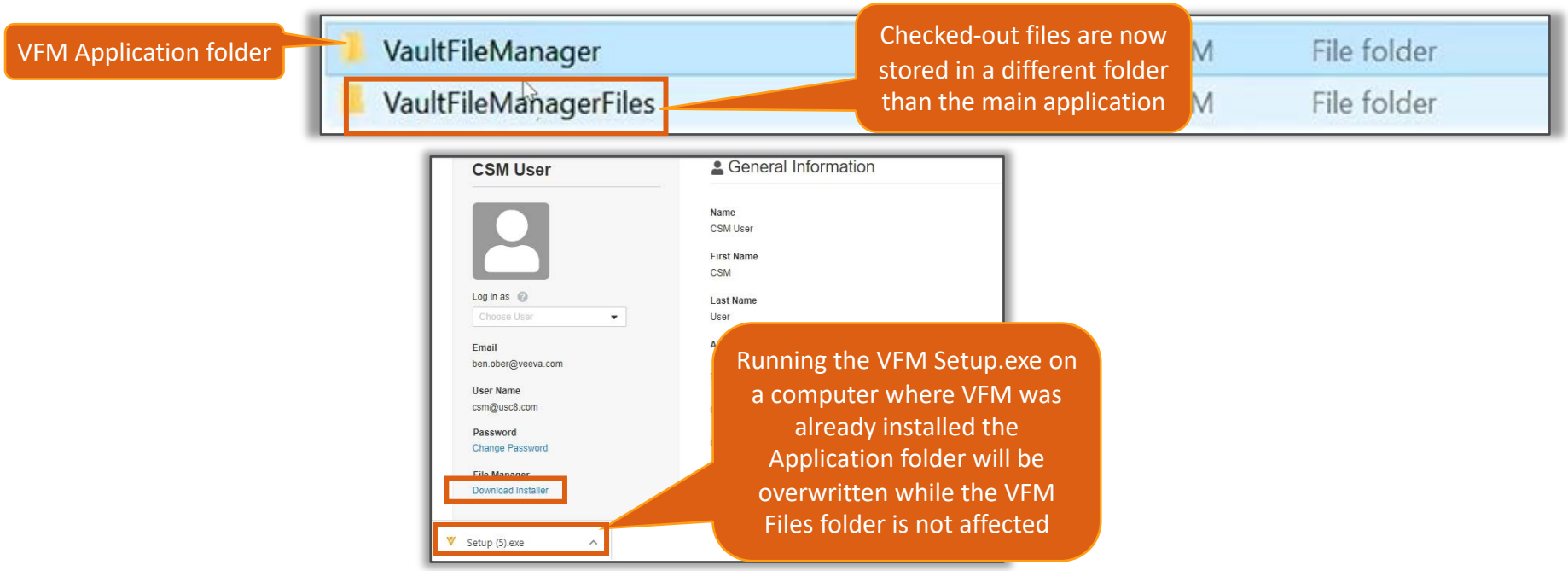
Vault File Manager

Install Vault File Manager Without Affecting Checked-Out Files

- Vault File Manager now includes a separate *VFM Files* folder that will prevent checked-out files from being impacted due to an automatic or manual running of the VFM Setup.exe



- Considerations
  - The new folder isn't created until you install/upgrade to 21R2 VFM
    - For example, running 21R2 Setup.exe will still cause overwrites if 21R1 VFM is installed

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Vault File Manager Enhancements

- Auto-Logout of Vault File Manager after inactivity
  - Vault File Manager has been updated to ensure users are automatically logged out after 8 hours of inactivity

- Vault File Manager Automatically Opens Files
  - All Vaults now automatically open the file types specified in your Vault File Manager Security Policy records
  - Learn more about Auto Open Settings for Vault File Manager

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Permission Label Update: Check Out to File Manager

- The Application *Check Out to File Manager* permission is being relabeled to *Vault File Manager*

Before 21R2

	Cancel Checkout	Download Document	Download Rendition	Bulk Delete	Bulk Update	Always Allow Unclassified	Check Out to File Manager	Portal Sync
Document		✓	✓	✓	✓			

As of 21R2

	Cancel Checkout	Download Document	Download Rendition	Bulk Delete	Bulk Update	Always Allow Unclassified	Vault File Manager	Portal Sync
Document	✓	✓	✓	✓	✓	✓	✓	✓

The Vault File Manager permission allows users to access all VFM functionality which includes uploading renditions

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Multichannel

CRM Approved Links Data Model Change

- The following components have been added to MedComms and PromoMats vaults to support the CRM Approved Links feature:
  - Added new picklist value Approved Links (approved_links__v) to the Distribution Channel Type (distribution_channel_type__v) picklist
  - Added new object record Approved Links to the Website (website__v) object
  - Added new field layout section Approved Links (approved_links__v)
  - Added the following shared document fields:
  - Shareable as an Approved Link (shareable_as_an_approved_link__v)
  - Message (message__v)
  - Link Label (link_label__v)

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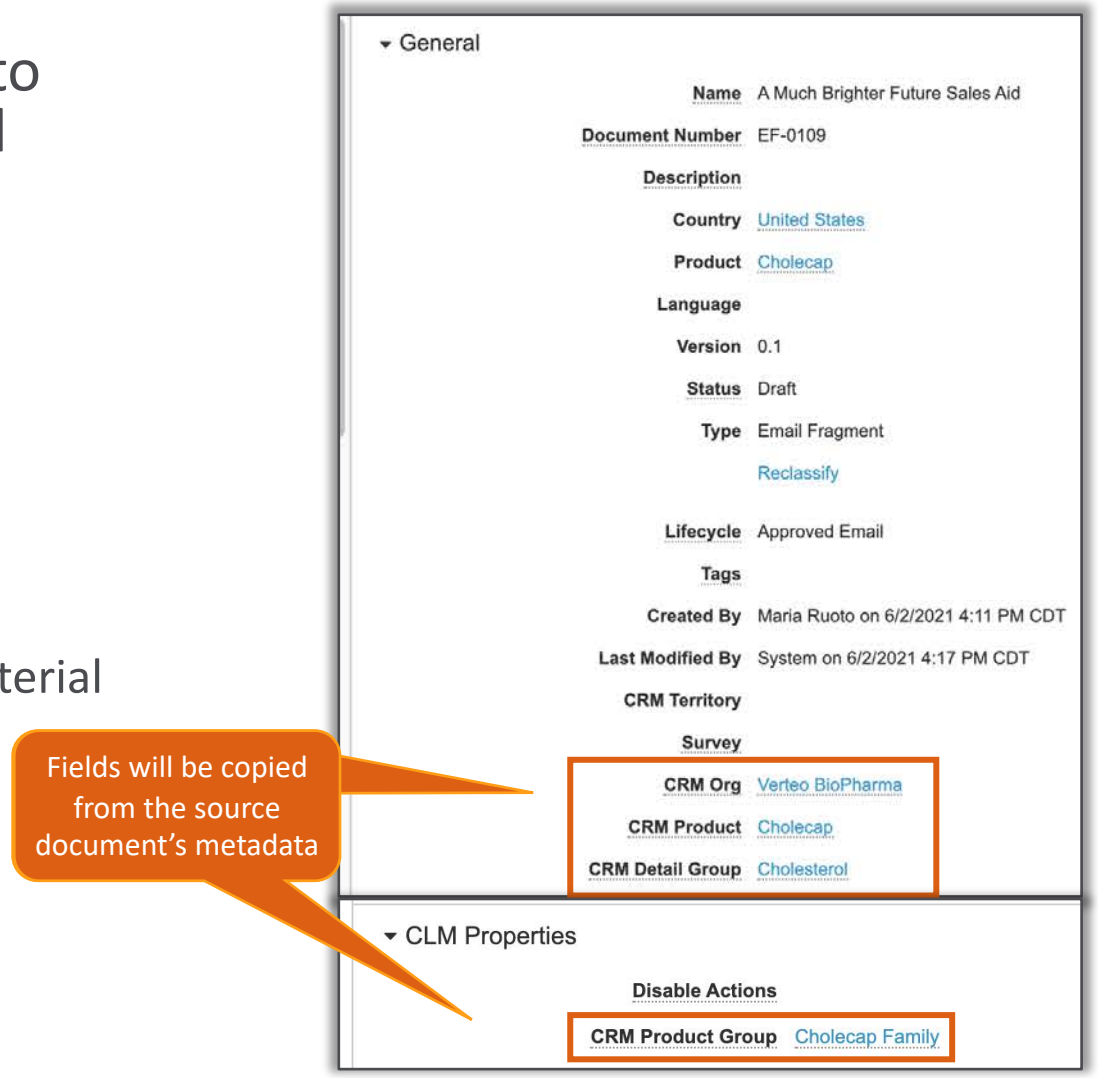
Create Fragment Includes Additional CRM Product Fields

- The Create Fragment feature will now copy standard CRM Product fields (listed below) to generated Email Fragments, if they are used on a source document
  - CRM Org
  - CRM Product
  - CRM Product Group
  - CRM Detail Group
- Considerations
  - CRM Metadata Sync must be enabled
  - The above fields must be included on both the Material and Email Fragment Doc Types



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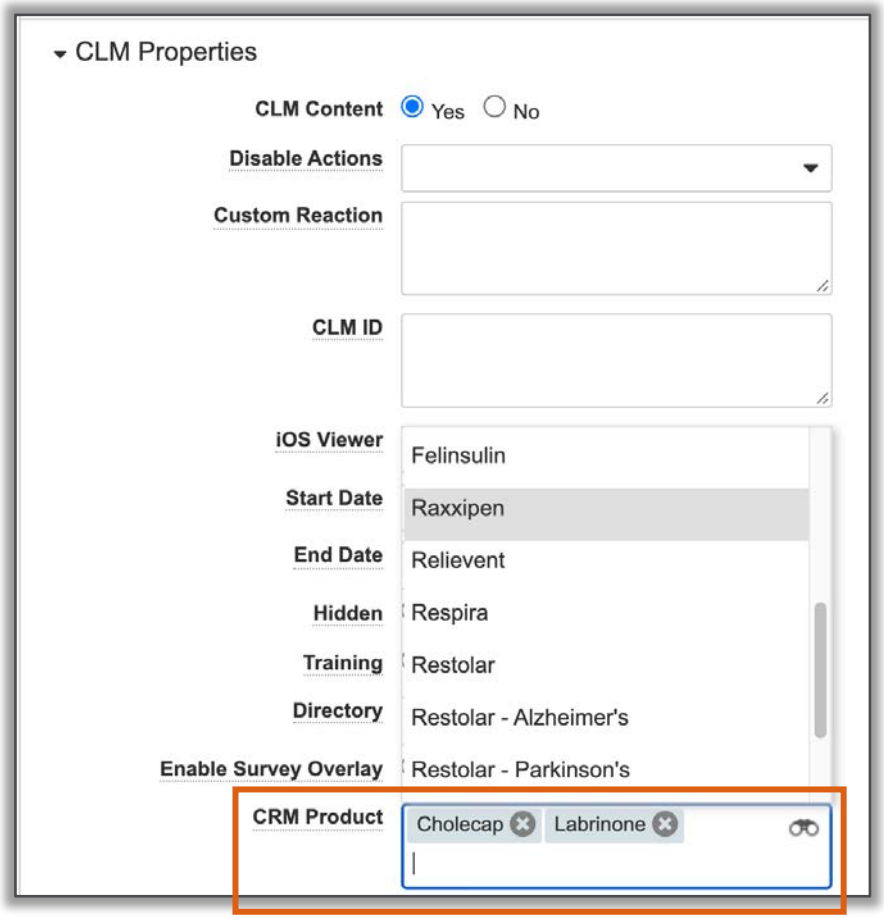
Data Model Change: Multi-Select CRM Product Fields

- Admins will be able to update the following three (3) single select fields in PromoMats and MedComms to be multi-select:
  - CRM Product
  - CRM Product Group
    - New field that represents the grouping of CRM Product and CRM Detail Group
    - Inactive by default; Admin must make active
  - CRM Detail Group
- Considerations
  - This Vault data model change lays the foundation for a planned CRM update scheduled for Q3, which will support multiple CRM Products on CLM Presentations and Slides
  - This functionality is dependent on the utilization of CRM Metadata Sync



The change should NOT be made until the CRM update is released

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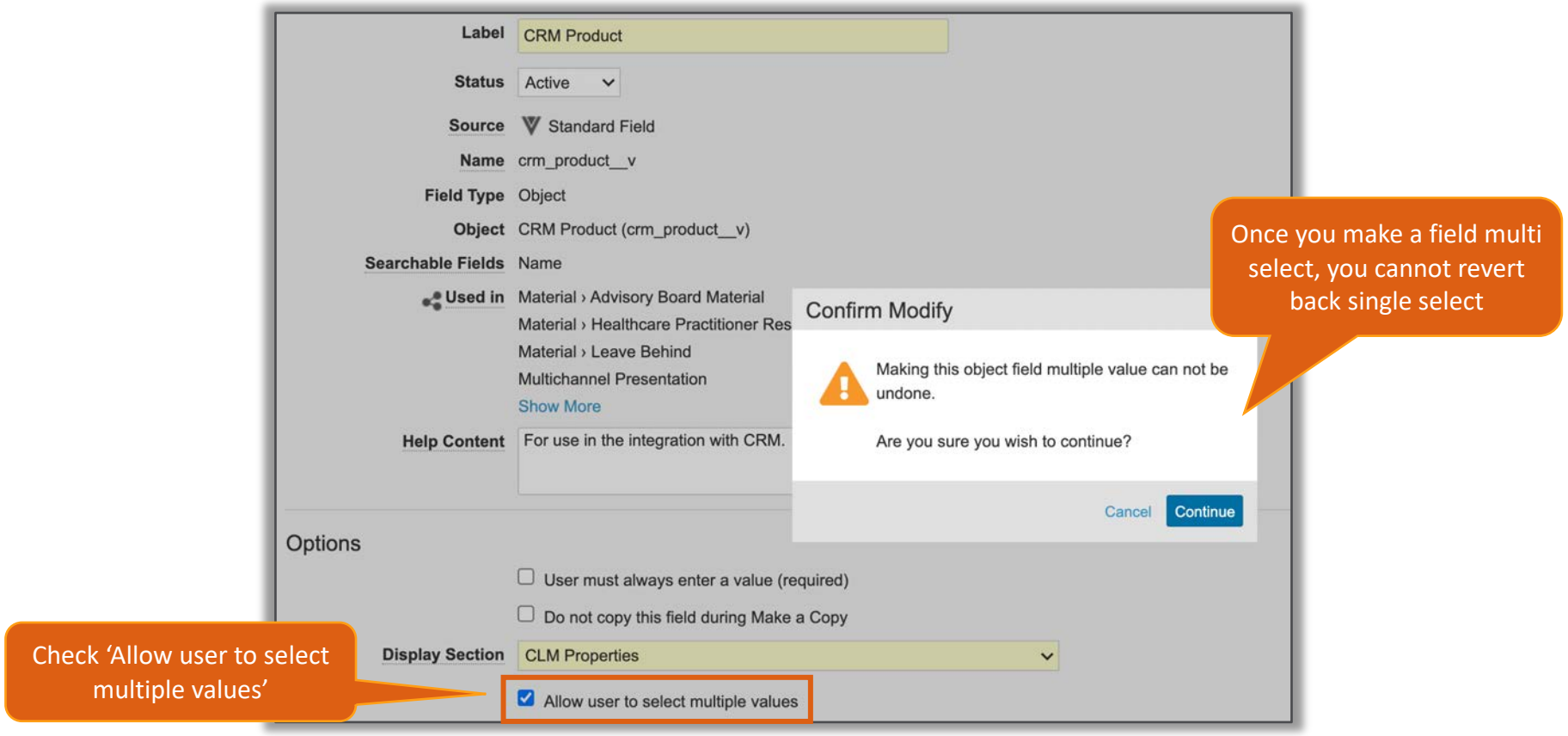
Data Model Change: Multi-Select CRM Product Fields

- Configuration
  - Admin > Configuration > Document Fields > Shared Fields > [CRM Product (crm_product__v), CRM Product Group (crm_product_group__v), CRM Detail Group (crm_detail_group__v)] > Allow user to select multiple values



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Support Long Text Request Details field for Medical Inquiry

- MedComms now supports Long Text fields (up to 32,000 characters), improving the data sharing from MedComms to Veeva CRM

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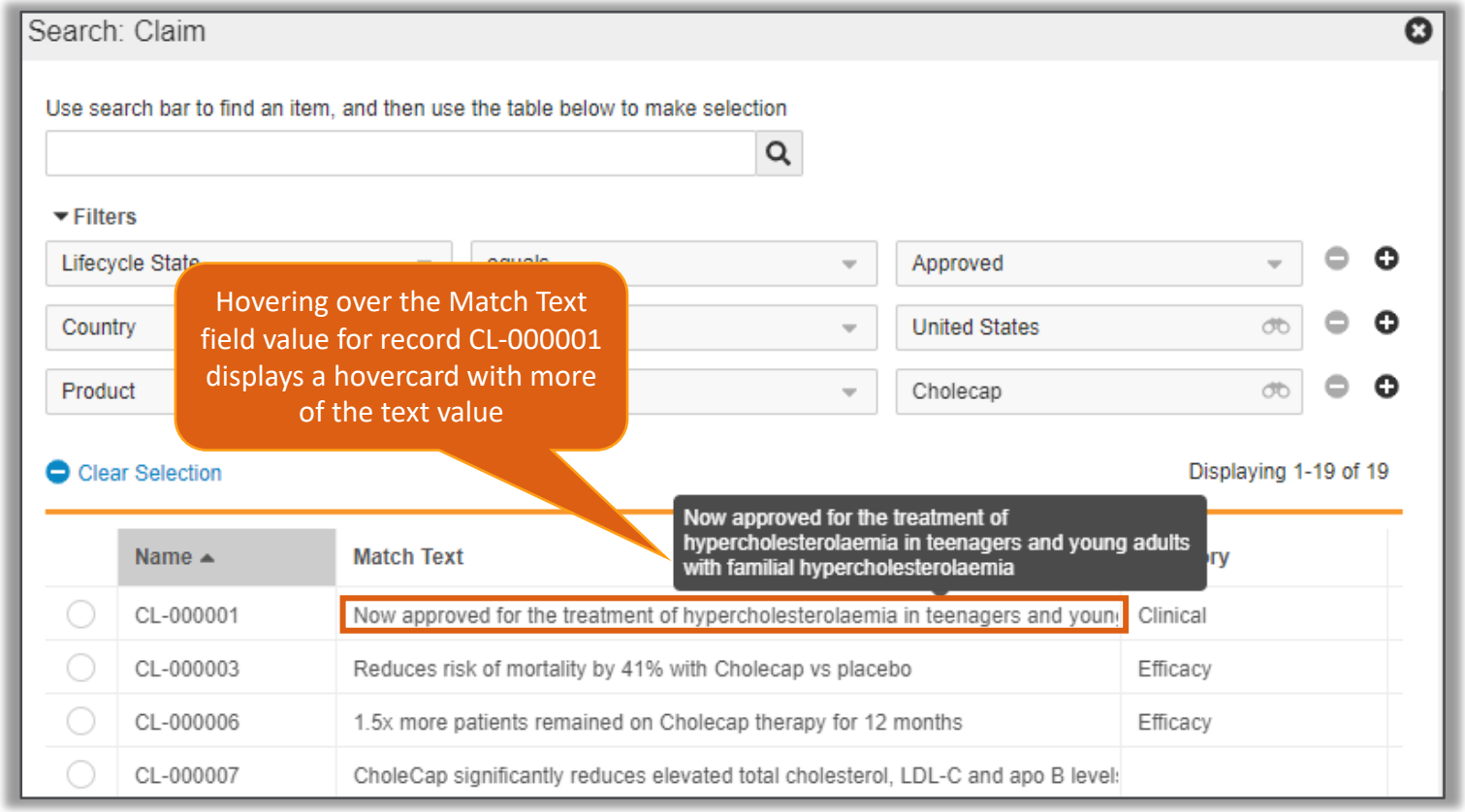
Objects

Hovercard on Record Picker Dialog Fields

- Vault will now display a hovercard with up to 1000 characters of text when users hover over fields on the record picker pop-up dialog



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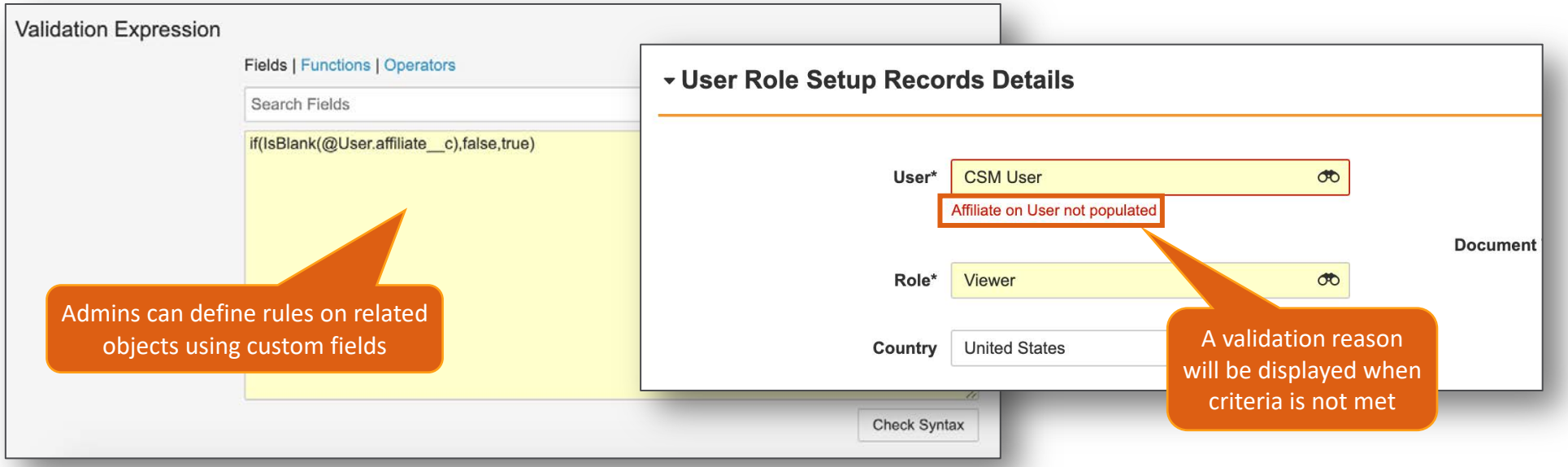
User Object Custom Field Supported in Validation Rules

- Custom fields on the User object can now be used in Vault validation rules for related object records
  - Gives Admins more flexibility to validate custom fields added to their User object



- Configuration
  - To add Custom fields to the User object: Admin > Configuration > Objects > User Object > Fields tab and creating a custom field
  - To add Validation Rules: Admin > Configuration > Objects > [select related object] > Validation Rules tab to define a validation rule using the custom field

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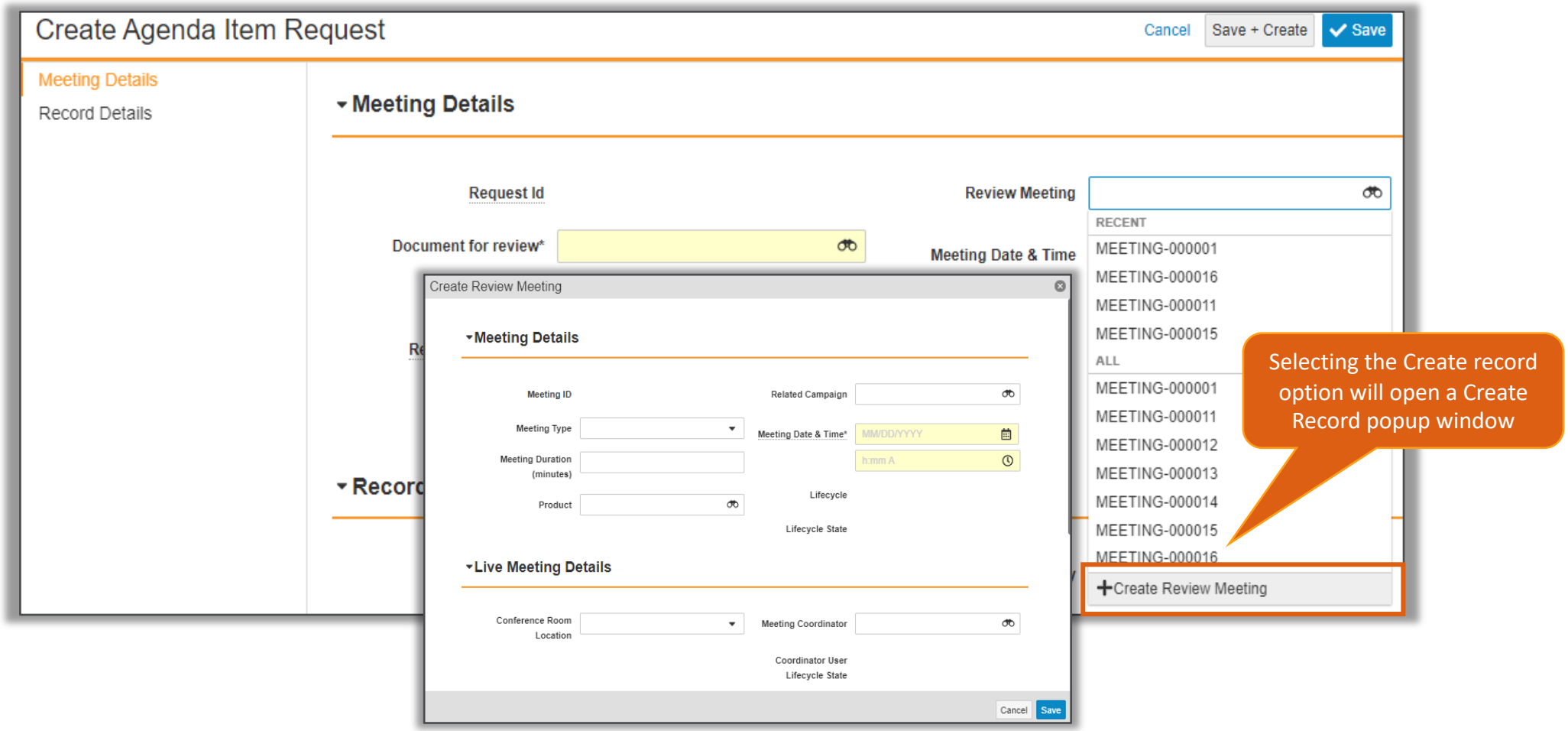
Create Related Record in Record Create Dialog

- Users now can create a related record directly in the create record dialog



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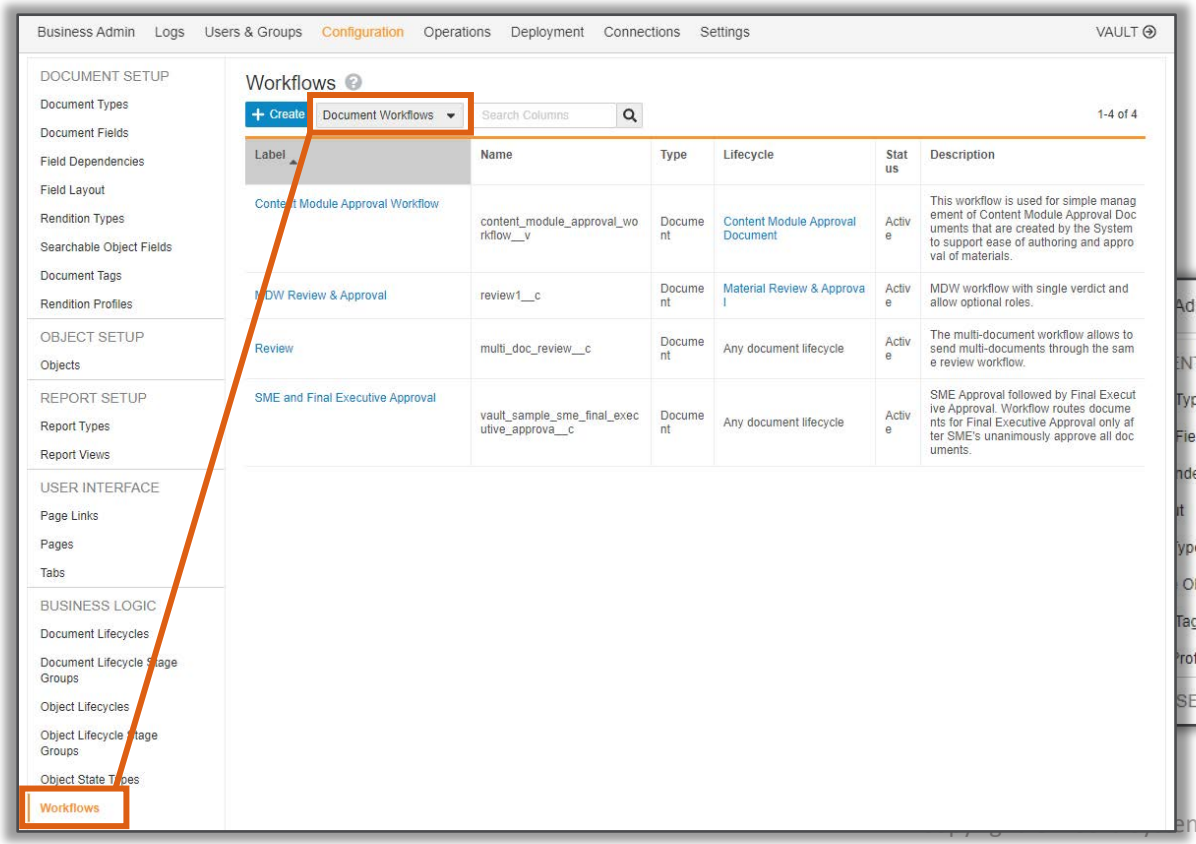
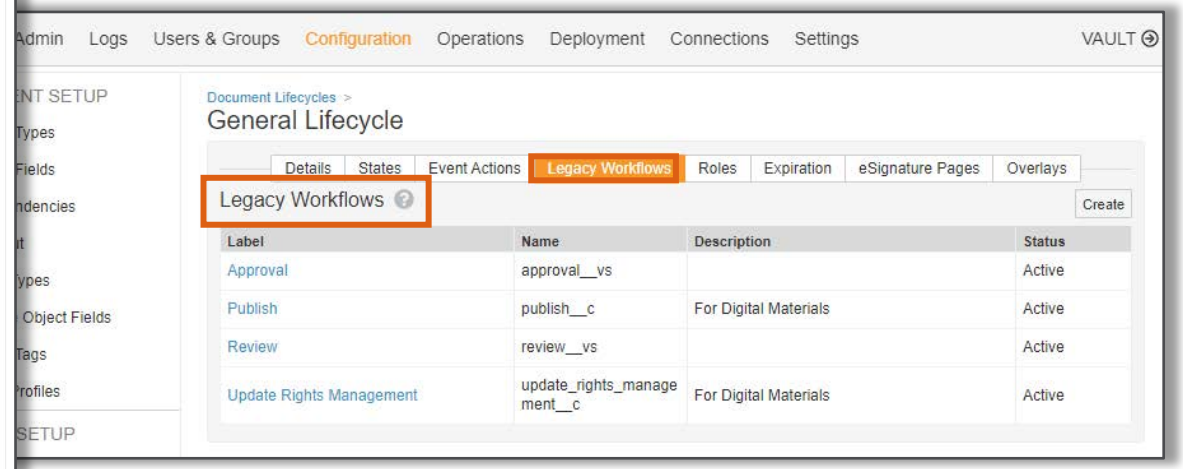
Document & Object Workflows

Document Workflows (*fka Multi-Document Workflows*) allow you to send one or more documents out for review and approval on a single workflow instance

Unified Workflow Access

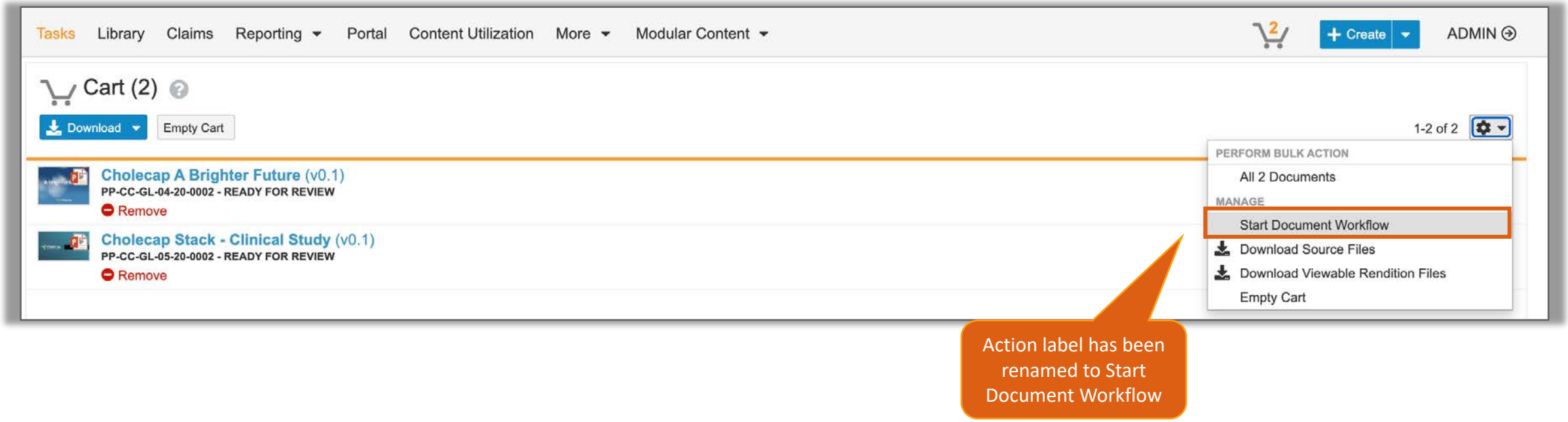
- Both Object and Document Workflows are now located under a single configuration page under Admin > Configuration > Workflows
  - In addition, single-document workflow functionality, is now called Legacy Workflows
- Considerations
  - If there are no workflows for a particular lifecycle, you will not see the Legacy Workflows tab





Rename Start Multi-Document Workflow to Start Document Workflow

- The *Start Multi-Document Workflow* action label has been changed to *Start Document Workflow*



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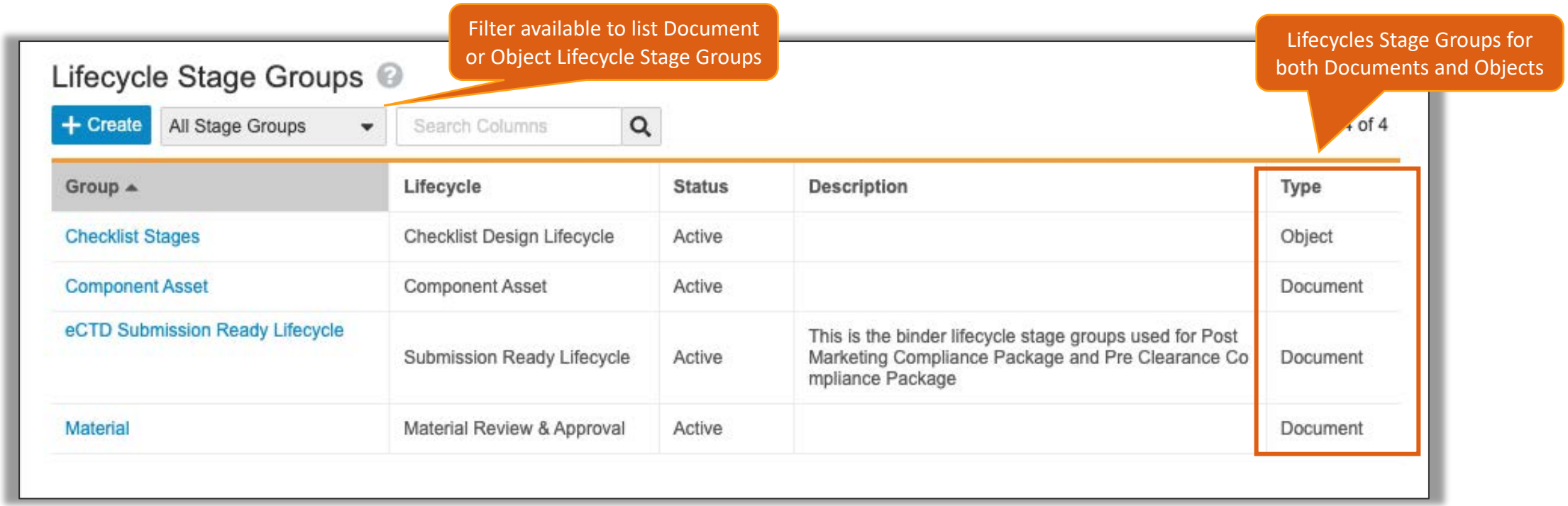
Unify Lifecycle Stage Group Configuration

- Document and Object Lifecycle Stage Group configuration are now located in the same page under Admin > Configuration > Lifecycle Stage Groups



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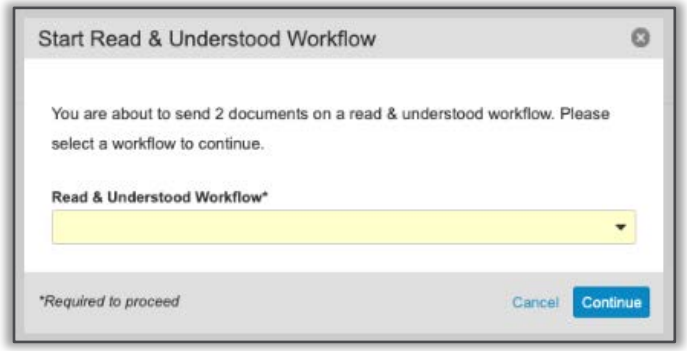
Read & Understood Workflows

- Admins can configure document workflows as Read & Understood workflows



- Considerations
  - Automatically available to applications and customers with legacy Read & Understood workflows
  - Read & Understood workflows have a limited set of workflow steps
  - Read & Understood workflow tasks are always required and can only have a single verdict
  - Only available as specific-lifecycle document workflow
- Use Case
  - Review documents for training purposes that must be read and acknowledged as being understood by users

Only available in MedComms

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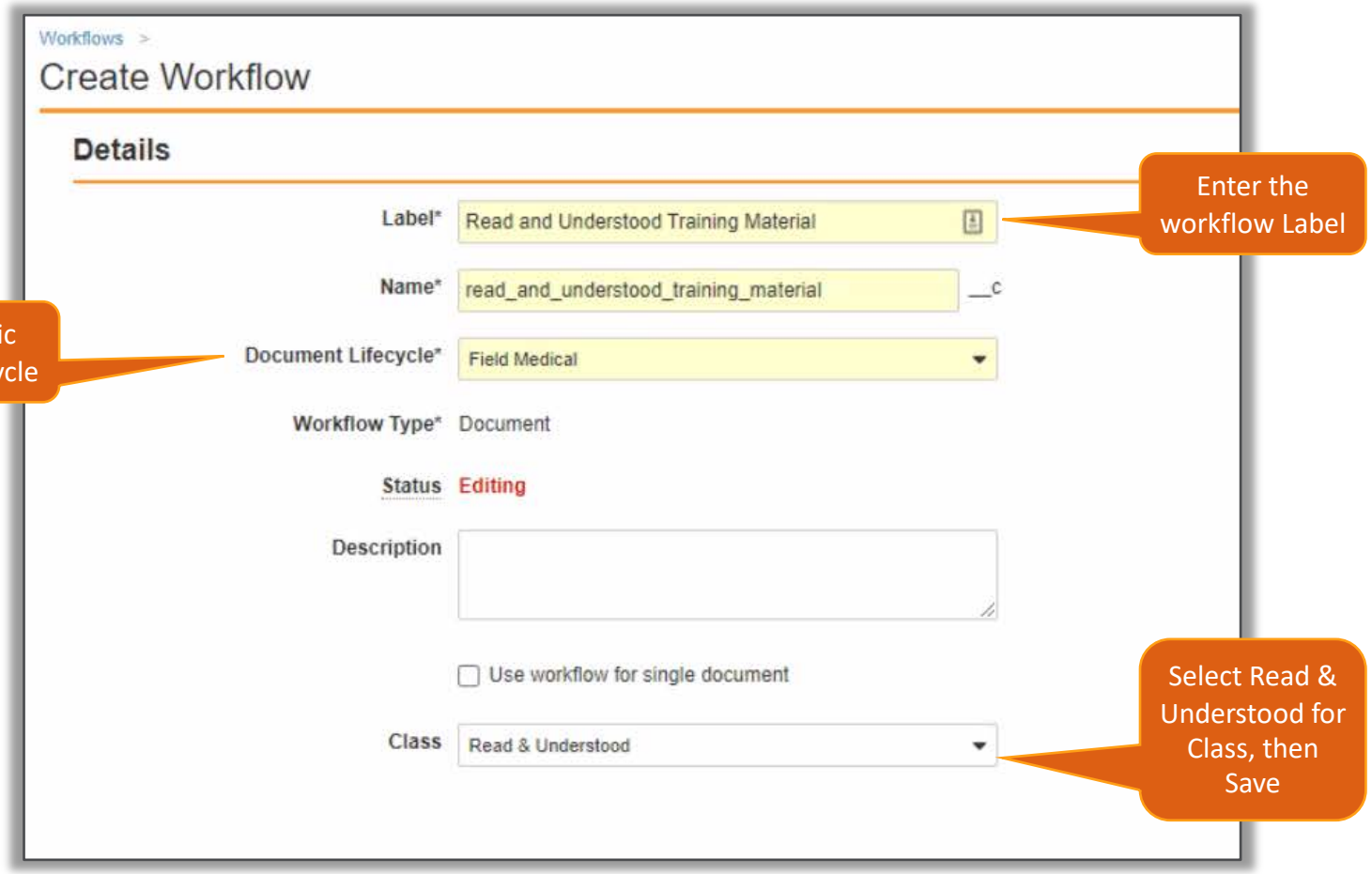
Read & Understood Workflows

- Configuration
  - Admin > Configuration > Workflows > Create > Document Workflow



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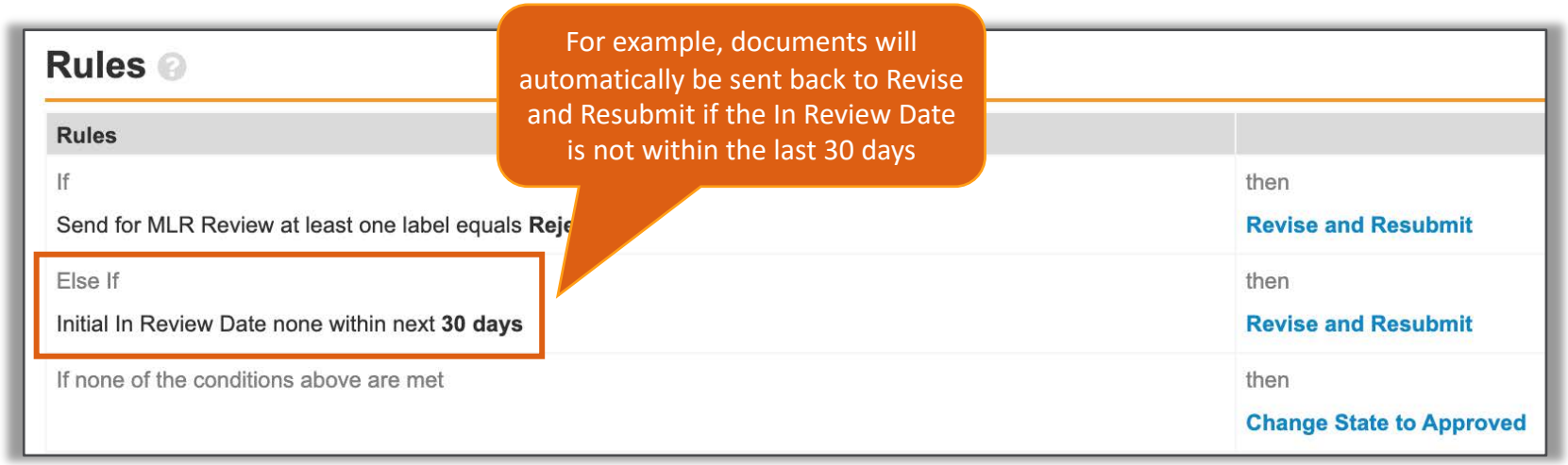
Date & DateTime Fields Support in Workflow Decision Step

- Date and DateTime fields are now allowed in Decision steps
- Considerations
  - Six (6) past/future operators are available for Date or DateTime fields

All within next All within last	At least one within next At least one within last	None within next None within last

  - Values can be within 'X' number of days, weeks, months, or years
  - Ensure that the selected field has a value entered prior to reaching the decision step



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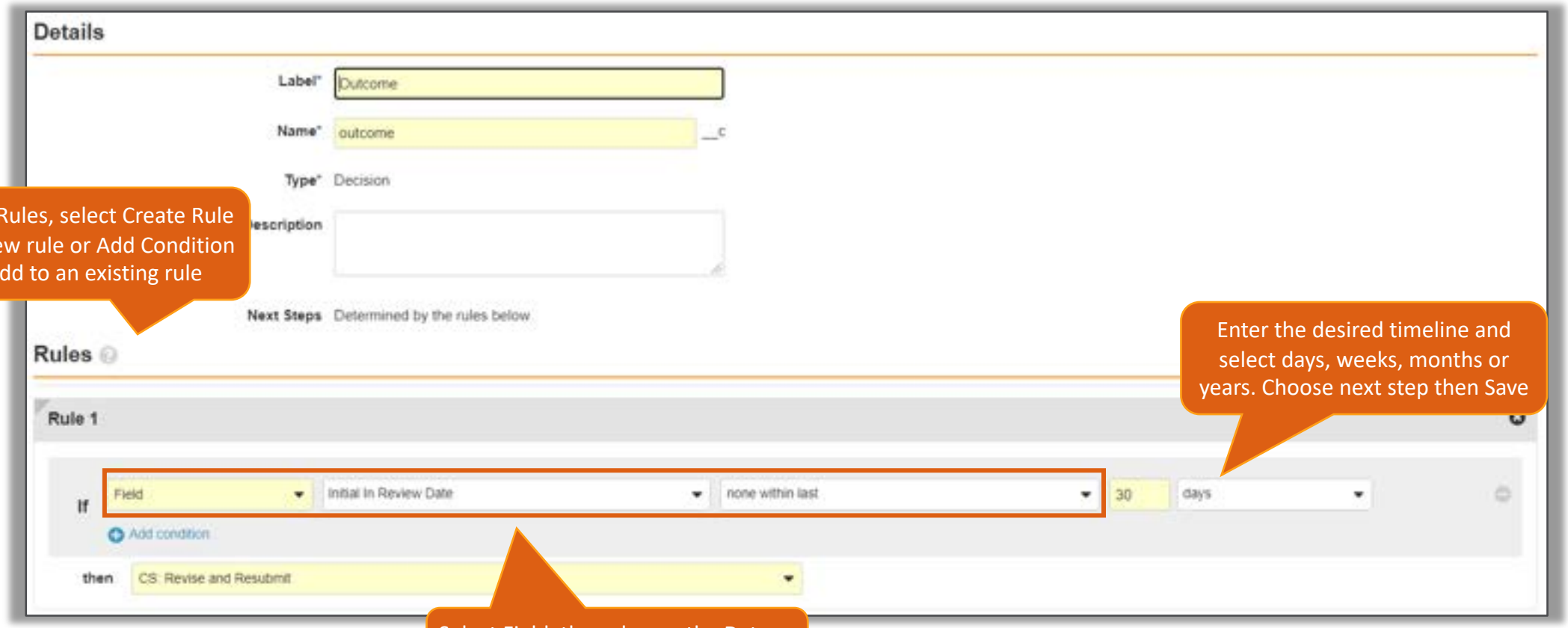
Date & DateTime Fields Support in Workflow Decision Step

- Configuration
  - Admin > Configuration > Workflows > [Workflow] > [Decision Step] > Edit



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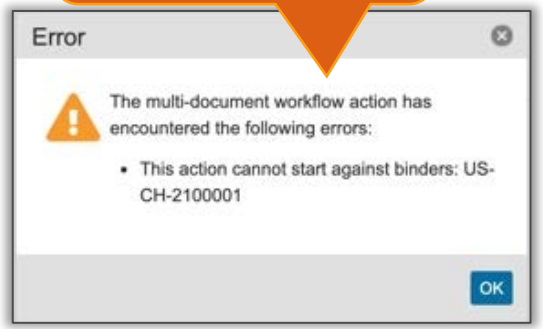
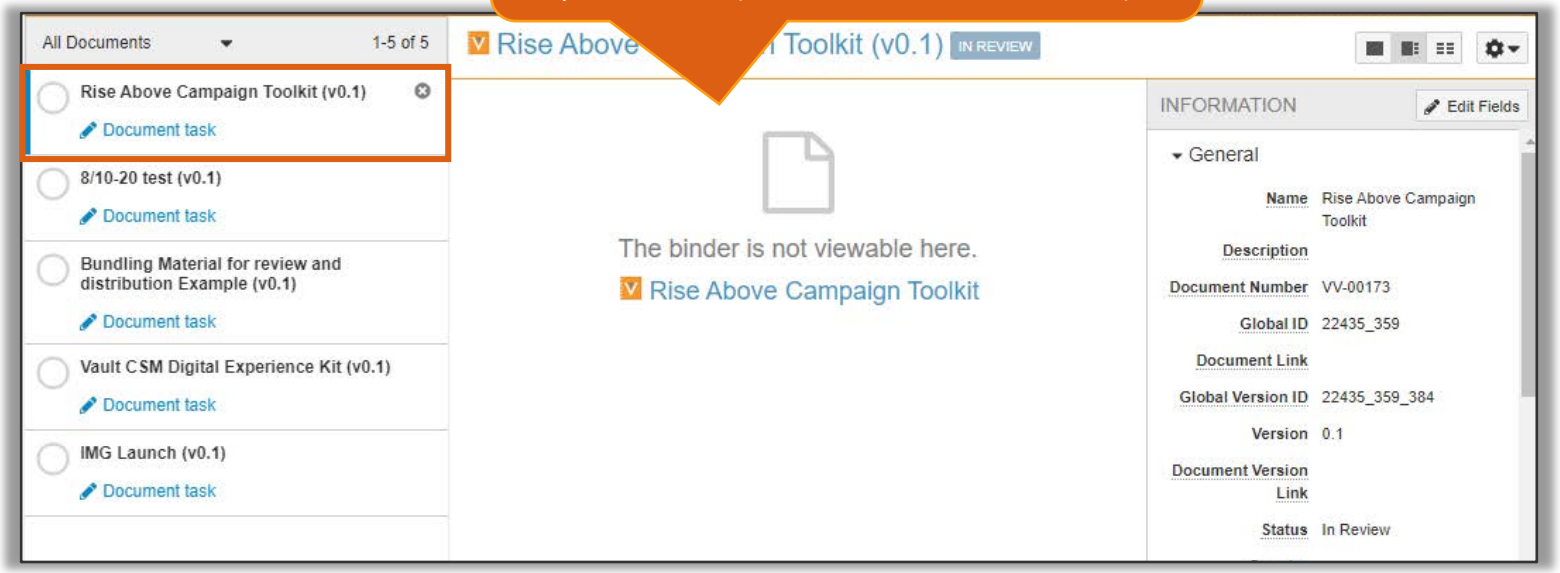
Document Workflow on Binders

- Document Workflows can now be started on a binder or a set of documents which includes a binder

Before 21R2 starting a document workflow on a binder generated an error



As of 21R2, when a document workflow includes a binder, the envelope view of the binder will show placeholders (no content can be visible in it)



- Considerations
  - The workflow is only applicable to the binder and not to its internal documents

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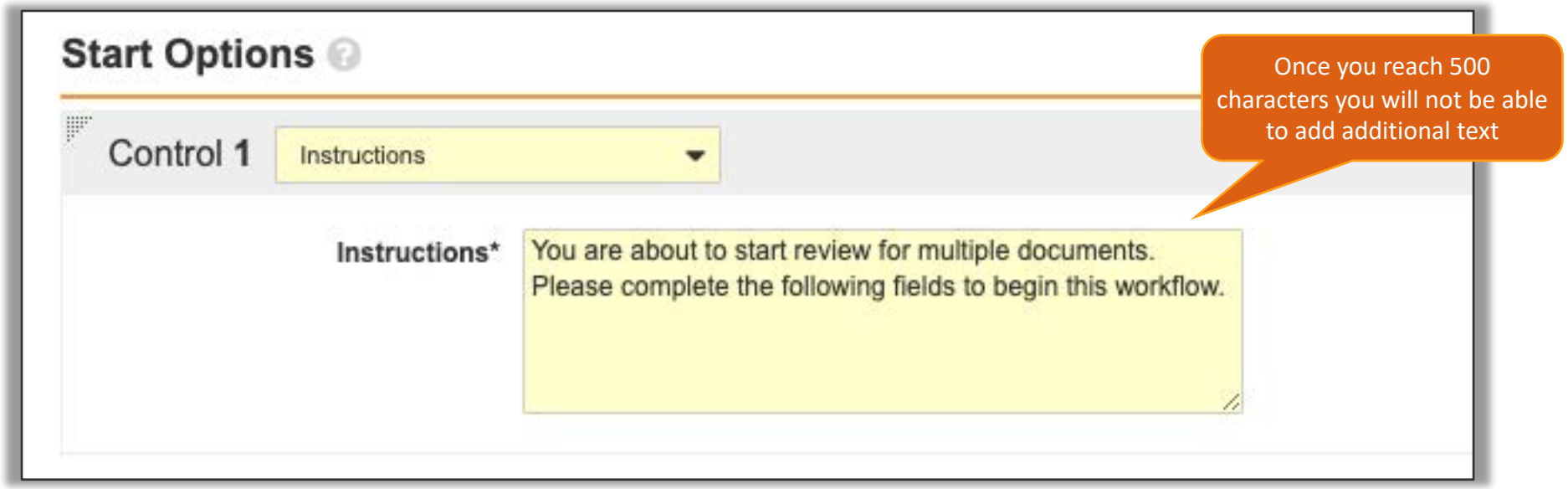
Maximum Character Limit for Instructions

- The maximum character limit for the instructions box of the Start step of a workflow has been updated from 200 to 500 characters



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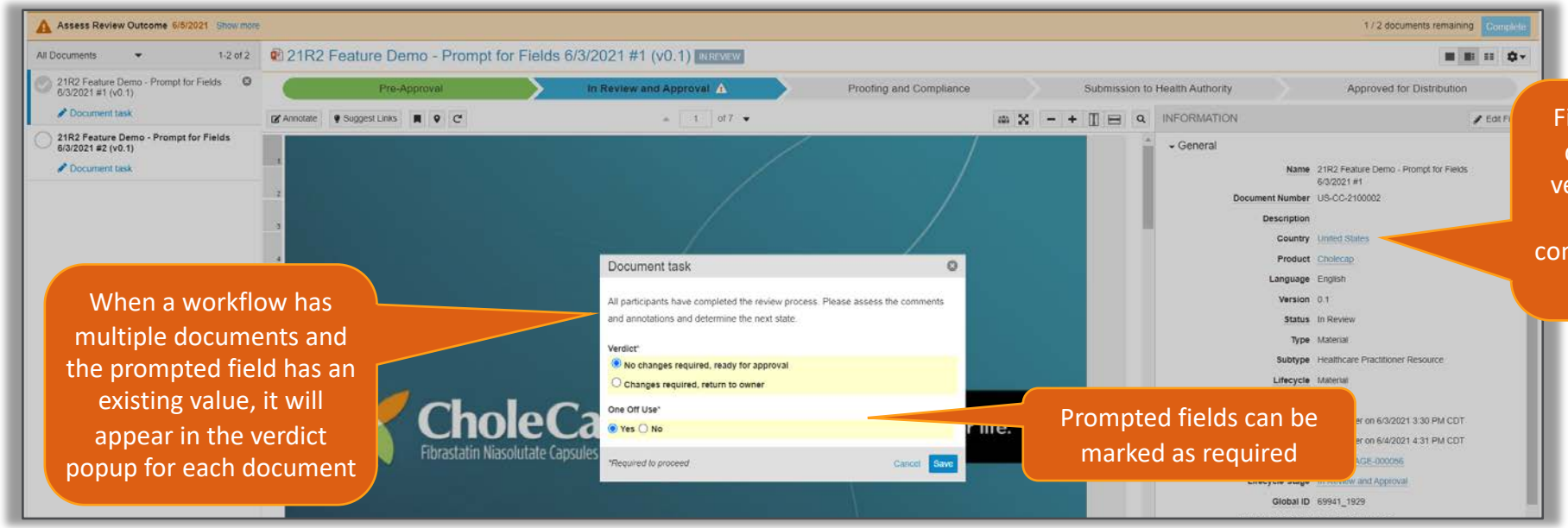
Prompt for Document Fields in Document Workflow Verdicts

- Admins can configure field prompts as part of a document workflow verdict
  - Fields are shown once a verdict is selected by the end user
- Considerations
  - Available for both ‘Any Lifecycle’ and ‘Specific Lifecycle’ workflows
  - Available for both single and multi-verdict document workflow
  - Max of 20 fields per verdict



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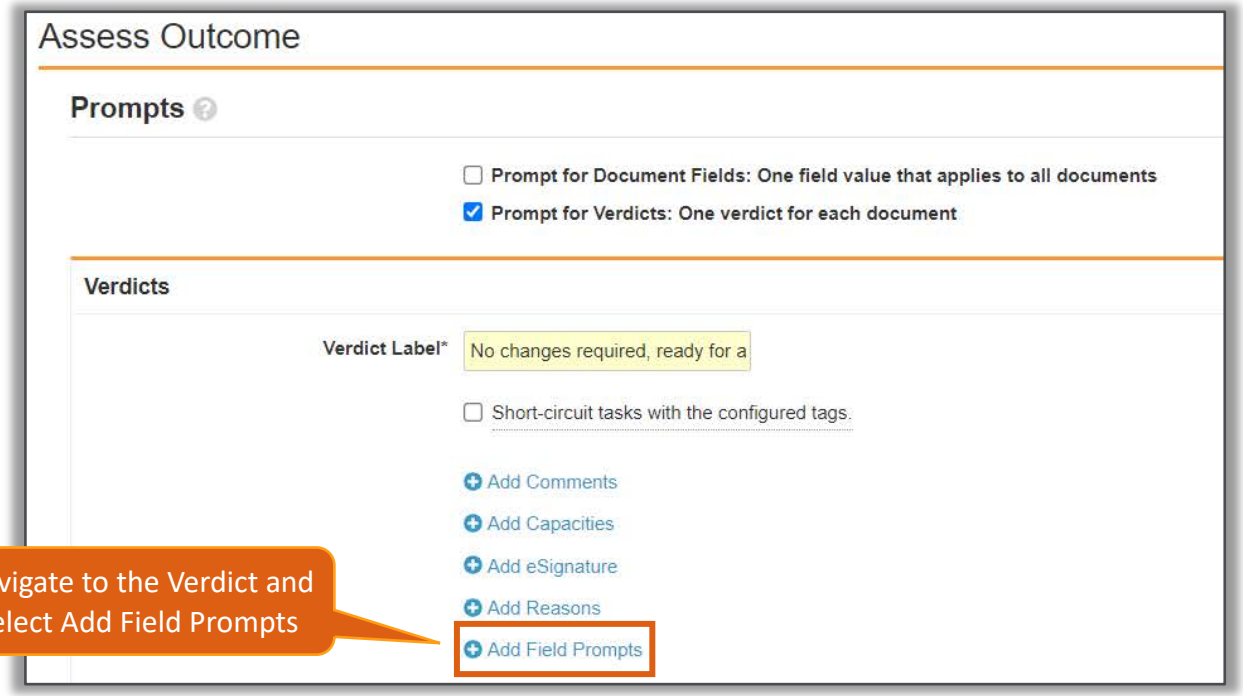
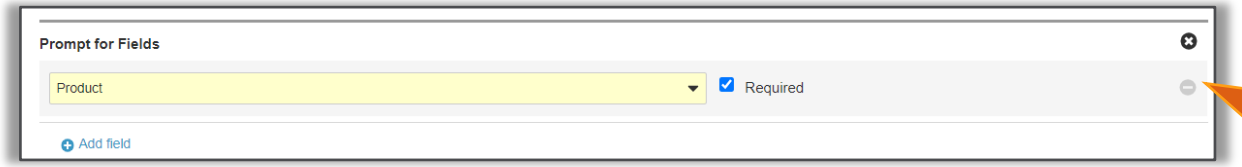
Prompt for Document Fields in Document Workflow Verdicts

- Configuration
  - Admin > Configuration > Workflows > [Workflow] > [Workflow Step] > Edit





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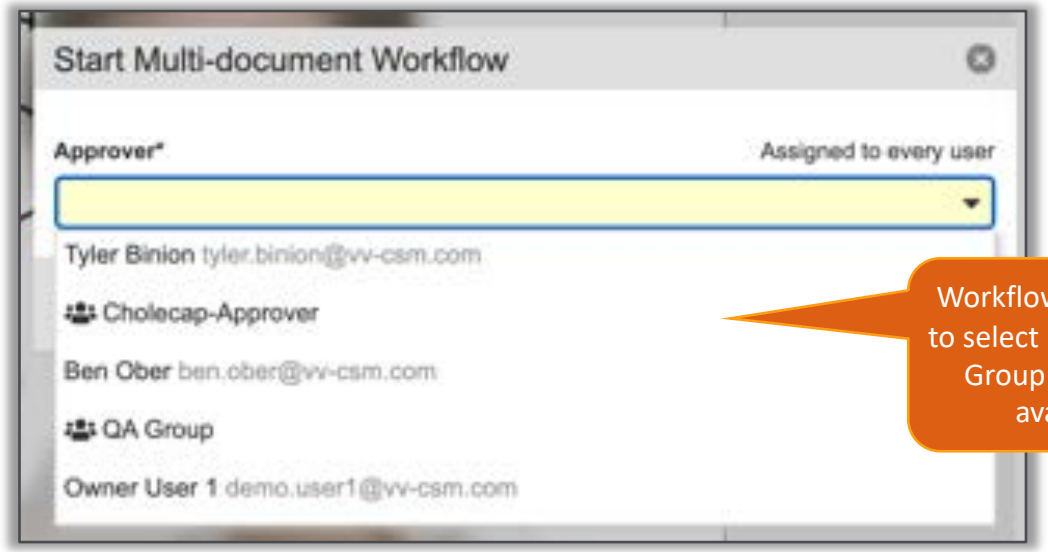
Support for DAC Lifecycle Role Allowed Group in Document Workflows

- Workflow initiators can now select and add users in the Allowed Group of a Dynamic Access Control (DAC) lifecycle role in a specific-lifecycle document workflow
- Considerations
  - Users already added to the Documents in a DAC role and selected by initiators won't give errors in Task Update Sharing settings
  - When the flag is on, initiators can also select users from the allowed group even though they are not part of the DAC configuration
  - Only supports Allowed Group for DAC roles
  - To leverage Allowed Group, participant group must be restricted to a role



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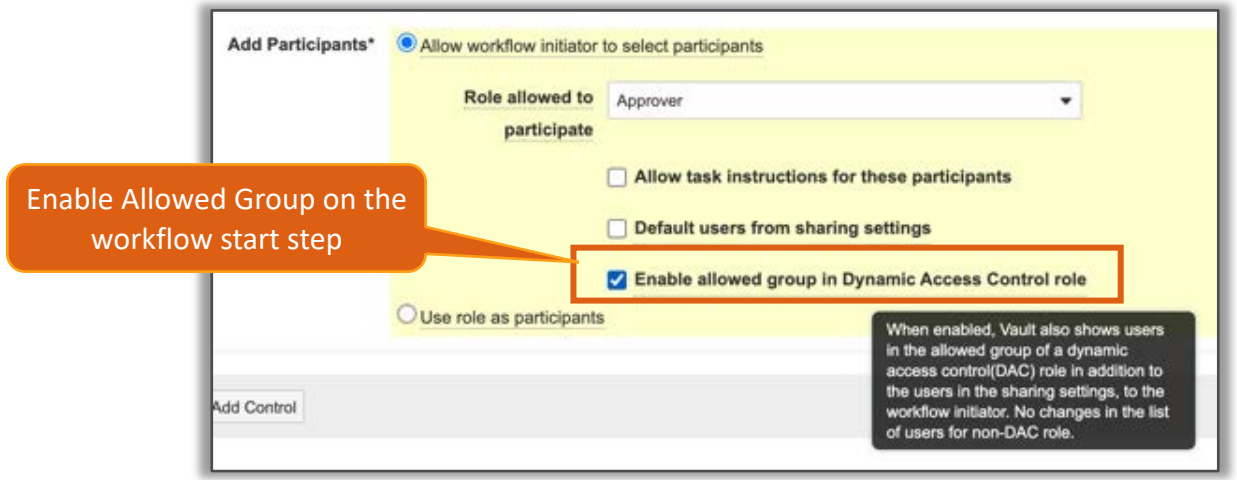
Support for DAC Lifecycle Role Allowed Group in Document Workflows

- Configuration
  - This feature is behind a workflow settings flag, that is off by default
    - Settings > General > Workflow
    - Once this flag is turned on it cannot be undone
  - To configure in the Workflow:
    - Navigate to the Start Step > Add Participant Control
    - Turn on the flag for “Enable allowed group in Dynamic Access Control role”
  - To configure on the Role:
    - Navigate to the Role > Enable Dynamic Access Control
    - Choose an Allowed Group



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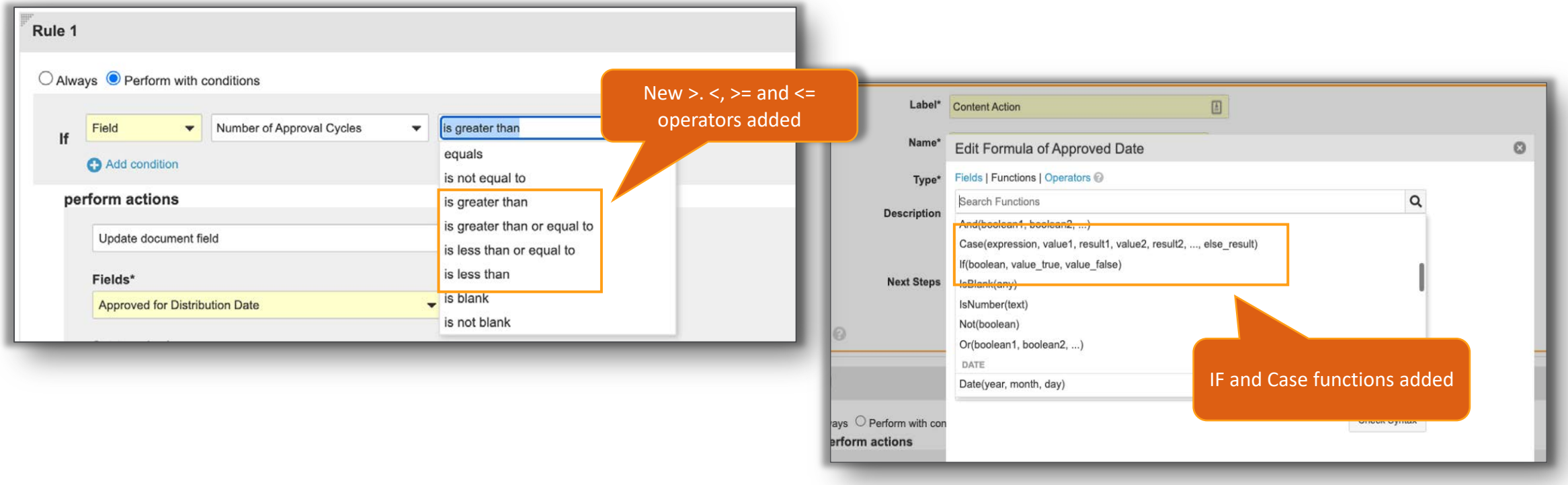
Expression Enhancement for Update Document Field in Lifecycle & Workflow

- Additional functions and operators are available to Admins so they can build more comprehensive expressions to update document fields inside a lifecycle event action, entry action, or document workflow content action step
  - New *IF* and *Case* functions have been included
  - New *greater than*, *less than*, etc. operators added



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Restrict Workflow Owner from Receiving a Task

- Admins can now restrict the Workflow Owner from receiving a workflow task

- The Workflow Owner can be excluded as an individual user when assigning tasks
- If the owner is part of a group that gets the task assigned, owner will not receive the task

- Considerations
  - If the owner is part of a group that has the task available, owner cannot accept the task
  - If the owner is changed and the new owner already had the task, the new owner won't be able to complete the task

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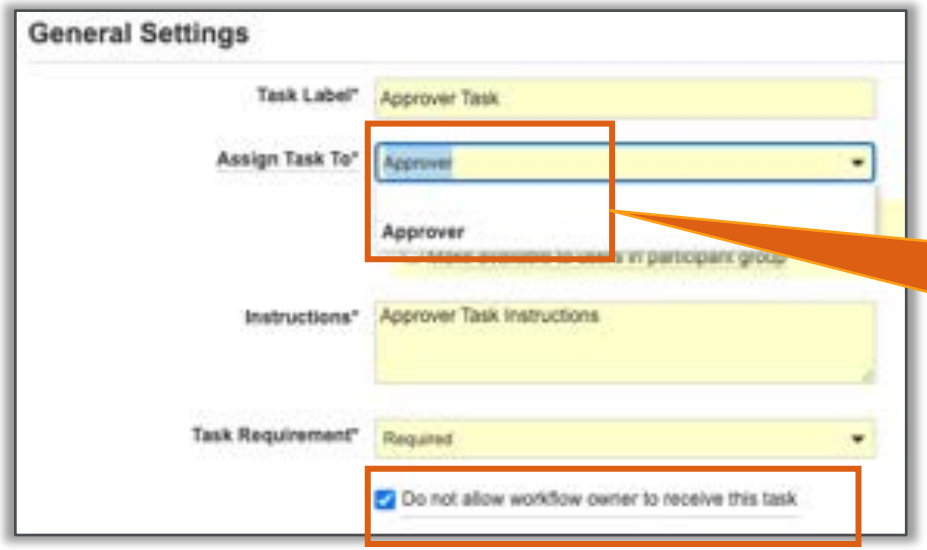
Restrict Workflow Owner from Receiving a Task

- Configuration
  - Select Task to Configure > General Settings > Checkbox ‘Do not allow workflow owner to receive this task’



- When checkbox is checked the Workflow Owner is unavailable as an option in Assign Task To field
- If the owner is part of the ”Approver” group they will not be available to choose when starting the workflow

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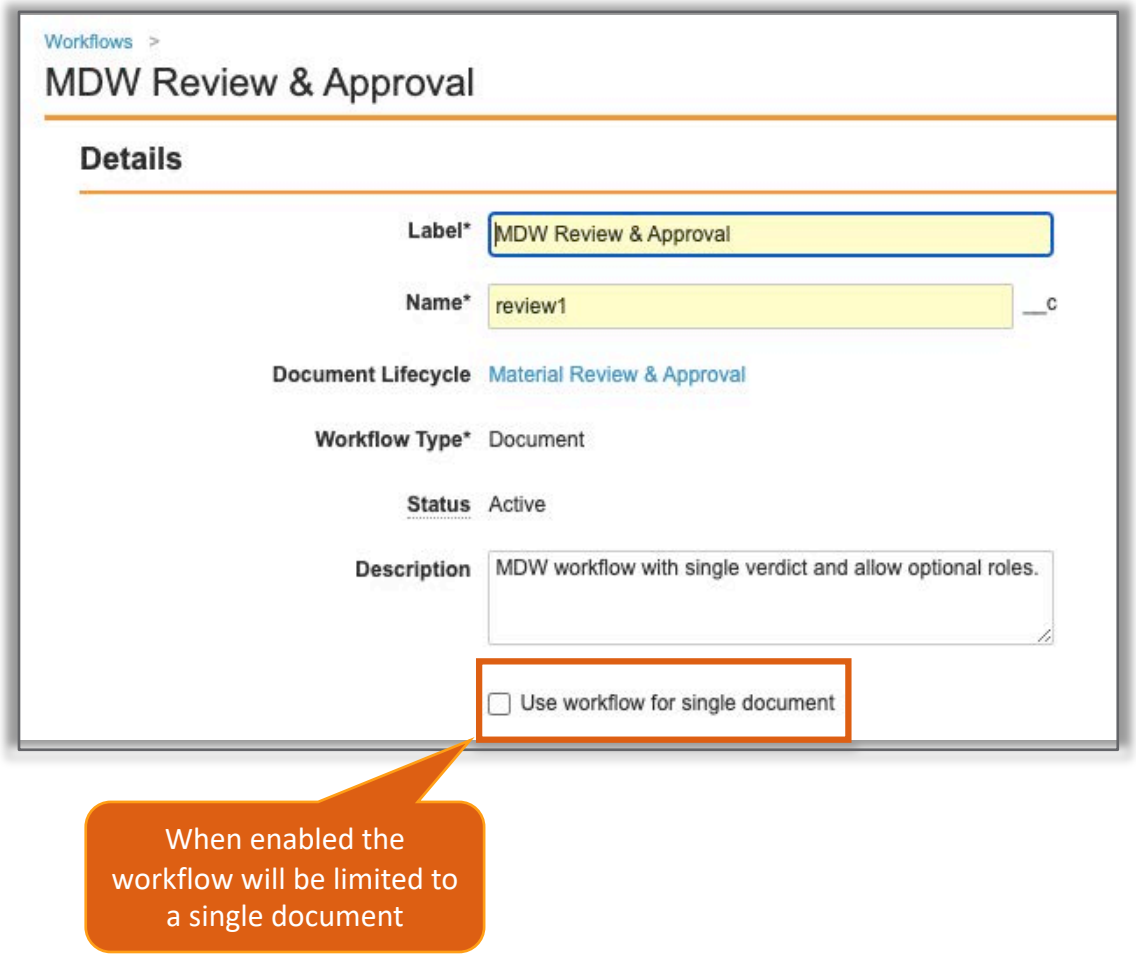
Restrict Document Workflow to a Single Document

- Admins can limit the use of a Document Workflow to one document
- Considerations
  - Available only for specific Lifecycle document workflows
  - The option for triggering the Workflow will only appear on the action menu of a single document
  - Users cannot start these workflows from bulk views such as Cart, Library, or Favorites
- Configuration
  - Navigate to Admin > Workflows > [Workflow] > Enable 'Use workflow for single document'



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Auto-Removal of Documents from Workflows

- Admins can now configure a content action to automatically remove documents from Document Workflows
- Considerations
  - Admins will have the option to keep removed documents in the current lifecycle state or move back to the start state
  - This removal action can only be configured with matching conditions
  - We would recommend a decision step is configured before the removal step to avoid any situations where all documents could be removed
  - If every document matches the condition for removal, Vault will display an error and does not remove documents
- Use Case
  - Documents that have been rejected can now be automatically removed from the workflow to avoid delaying the availability of approved materials

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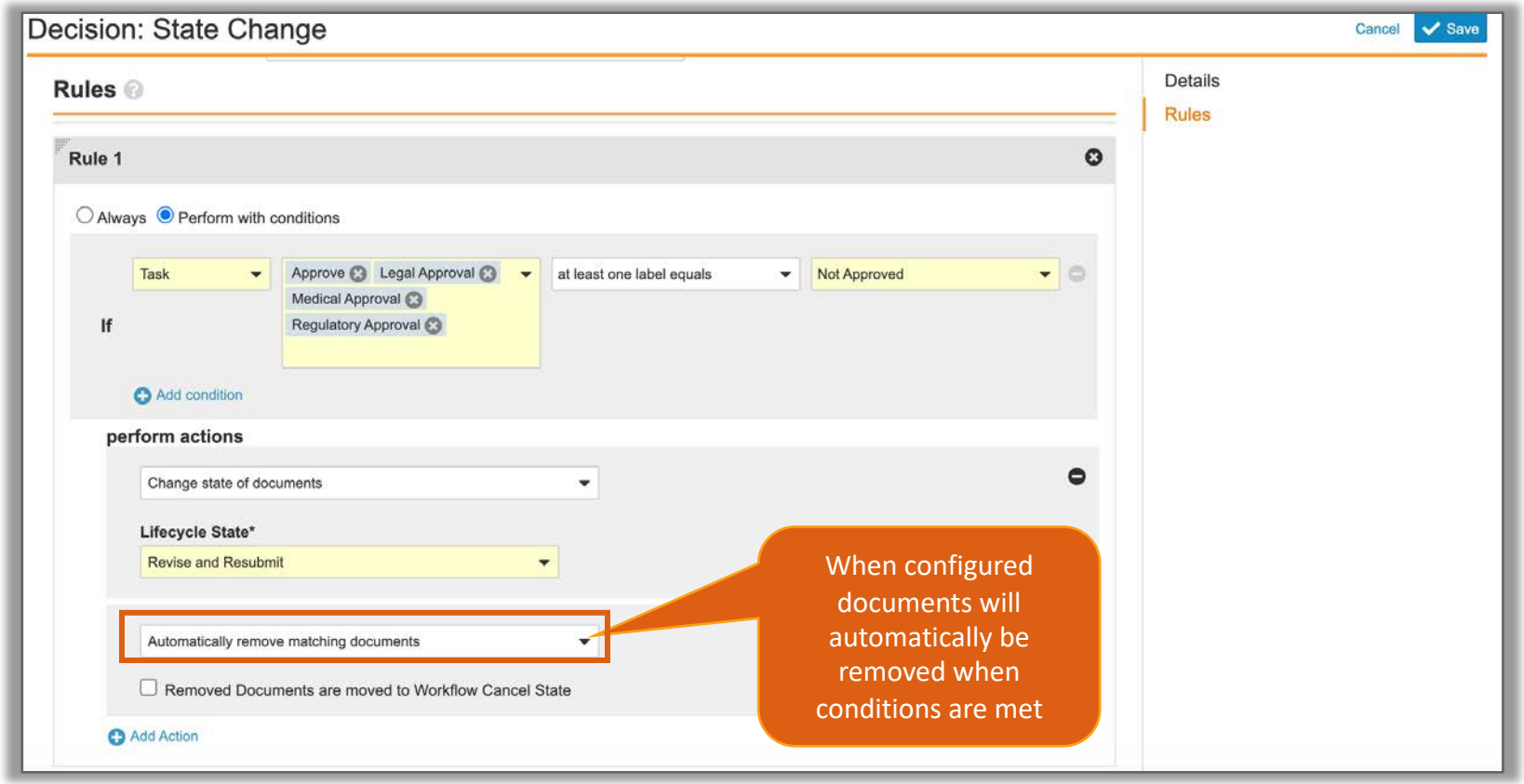
Auto-Removal of Documents from Workflows

- Configuration
  - Admin > Configuration > Workflows > [Select Workflow] > Content Action > Rule > Perform with Conditions



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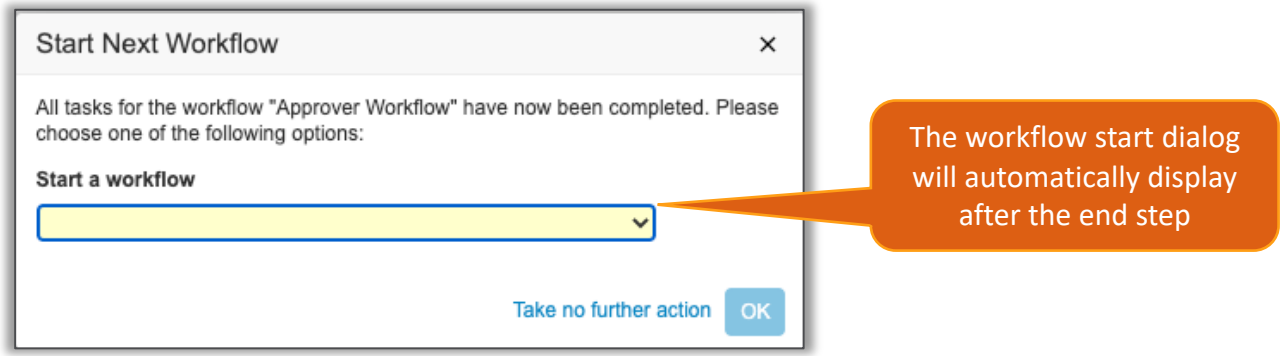
Display Next Workflow Start Dialog When Current Workflow Ends

- Admins can configure the workflow End step to automatically display a workflow start dialog when the current workflow ends



- Considerations
  - The Start dialog is available to the last user whose action completes the workflow only if the user has permission to start a workflow

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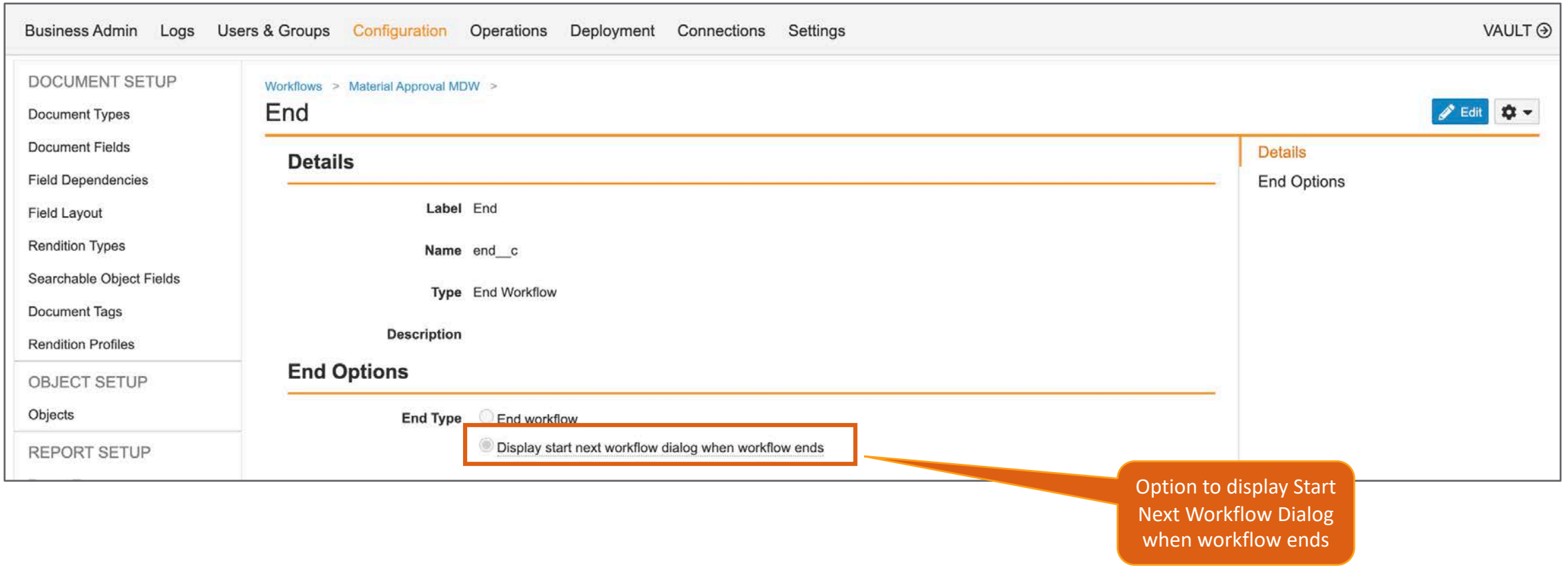
Display Next Workflow Start Dialog When Current Workflow Ends

- Admin > Configuration > Workflows > [Select Workflow] > End



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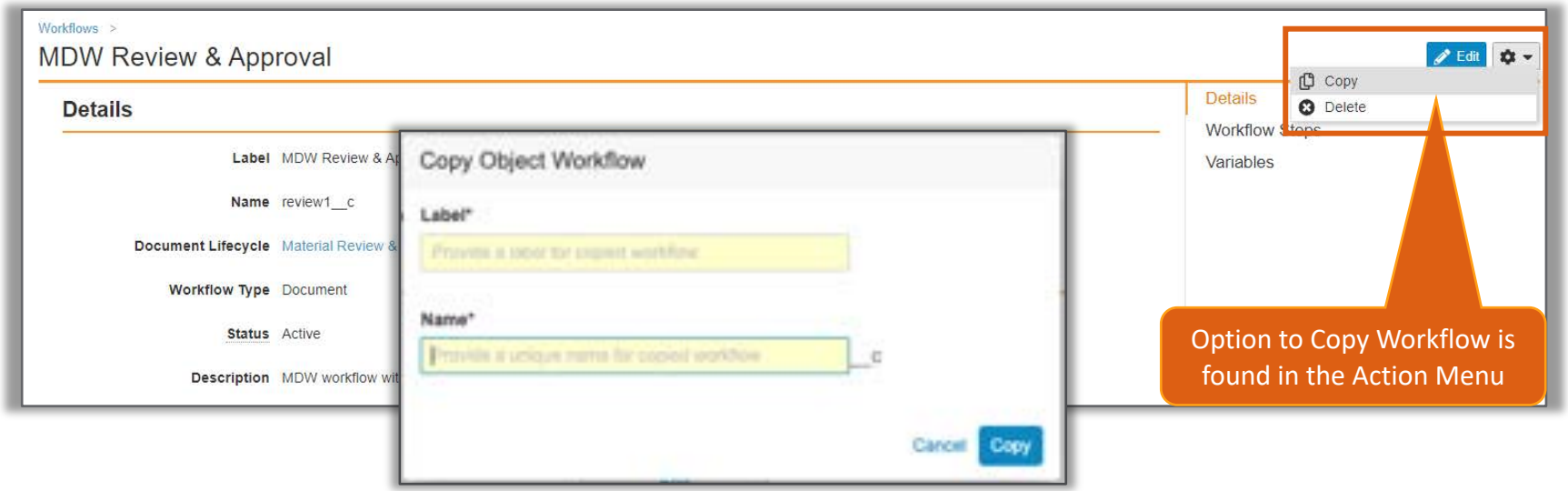
Copy Workflow

- Object and Document Workflows can now be copied
  - The copied workflow will retain the same object or document type and lifecycle as the source
- Considerations
  - Copied workflows are always created inactive and need to be activated prior to using
  - Copy can be actioned from list page and workflow details page



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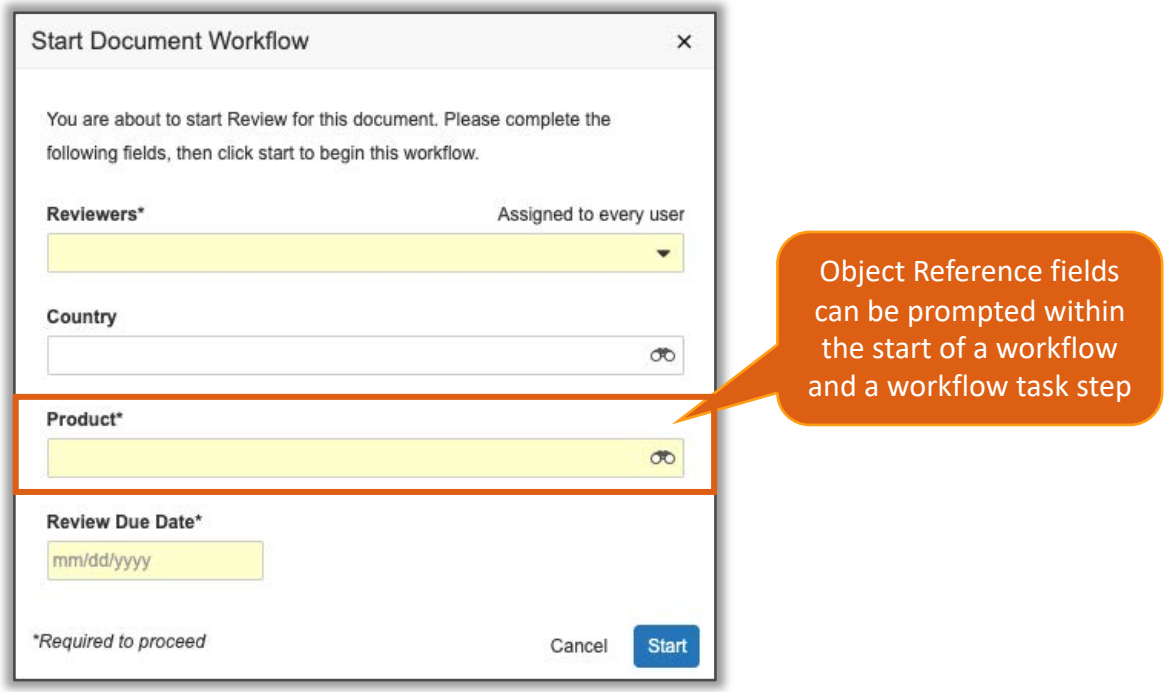
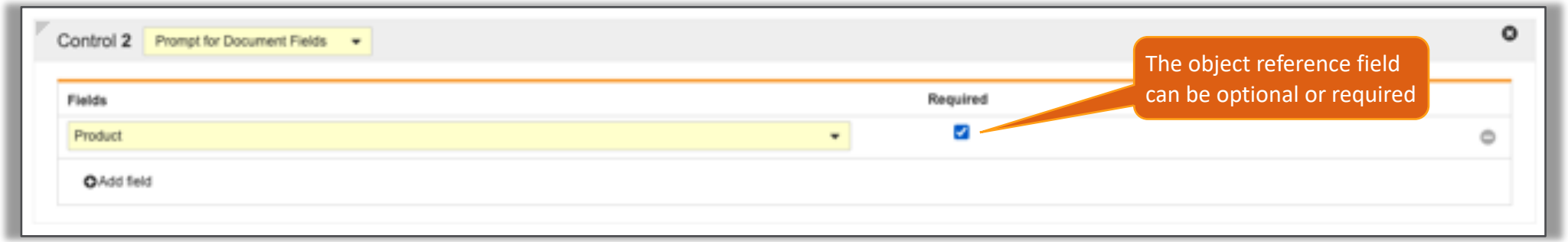
Prompt for Object Reference Fields in Document Workflows

- Object reference fields can be prompted within a document workflow start step, task step, or task verdict
- Considerations
  - Supports both single and multi-value reference fields



- Configuration
  - Admin > Configuration > Workflows > [Select Workflow] > [Select Step] > Prompt Section



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Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 21R2 Release Kit: https://www.veeva.com/products/commercial-vault-release-presentations/
- Vault Resource Library: https://support.veeva.com/hc/en-us/articles/360013243773-Veeva-Vault-Educational-Resource-Library
- Vault Help: http://vaulthelp2.vod309.com/wordpress/

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21R2 Release Developer Webinar

July 16, 2021 – Register here

Service Announcement: Integration DNS Caching Recommendations

Java SDK & Integrations

- Postman/VAPIL Recap
- User-Defined Models
- Object Metadata Service Field Type Support
- Audit Enhancements: On Behalf of User
- Integration with One Workflow

API & VQL

- Miscellaneous API & VQL changes
- Workflow APIs
- VQL for One Workflow

Vault Loader / Data Extract

- Scheduled Data Extract
- Action UI Enhancements

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Thank you

Appendix

Enforce Use of HTTPS When Configuring SAML & OAuth 2.0 Profiles

- Admins are enforced to used HTTPS (hypertext transfer protocol secure) instead of HTTP when creating SAML profiles and OAuth 2.0 profiles
- Considerations
  - This change only applies when creating new profiles or updating existing ones
- Configuration
  - **SAML**: Admin > Settings > SAML Profiles
    - It applies when importing the Identity Provider (IdP) metadata
  - **oAuth**: Admin > Settings > OAuth 2.0 / OpenID Connect Profiles
    - It applies when uploading OAuth 2.0 Authentication Server metadata

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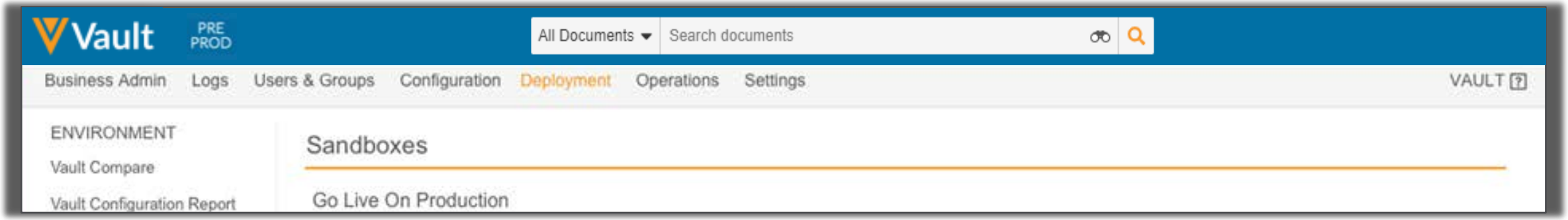
Promote to Production

- A Pre-Production Vault has been introduced with this feature
  - From Pre-Production, customers can create Sandbox environments to configure their Vault
  - Promote to Production introduces a one-time action to promote to a Production Vault
  - Can also create your own Pre-Release or Sandbox Vault
- Considerations
  - Allows Admins to now refresh or create a Pre-Release Vault from Production



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Localize Vault to Swedish

- The Vault UI now supports Swedish
  - Users can update the language Vault displays for them by changing the language settings on the User Profile page
- Considerations
  - Vault also supports setting Swedish translations for labels in user-configurable data such as document types, fields, picklist values, and lifecycle names

- Learn more about supported languages and localization settings

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Disable Office Online on ALL Vaults

- Users will no longer be able to perform the action ‘Check Out to Office Online’
  - Collaborative Authoring with Microsoft Office 365™ is the go-forward solution
    - Collaborative Authoring allows users to edit documents in Microsoft Office 365™ desktop applications and in their browsers
    - Further information on Collaborative Authoring can be found within the dedicated resource hub:
      - https://www.veeva.com/products/vault-platform/collaborative-authoring/
- Considerations
  - Documents that are checked out to Office Online can still be checked in before 21R3
    - From 21R3 this functionality with be deprecated entirely
    - Any edits on documents not checked in before 21R3 will be lost

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Enable Document Tags on All Vaults

- The Document Tags feature has now been enabled on all Vaults
- Considerations
  - There are no changes in the Document Tags feature itself
  - If customers do not want their users to use this functionality, simply hide the Document Tags field so it doesn't display on the document

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Domain Admin Support for Cross-Domain Users

- This feature adds support for cross-domain users as Domain Admins
  - This feature may not be validated in pre-release vaults

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Group Membership Update for Inactive Users

- Group memberships from included security profiles are automatically removed when a User becomes inactive
  - These memberships can be for groups that are either user-managed or system-managed

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Release Account Lockout After 5 Minutes

- After 5 unsuccessful login attempts Vault will automatically release the lock out 5 minutes after the last unsuccessful attempt

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48 Hour Maximum Session Duration on All Vaults

- The maximum duration of a Vault session is always 48 hours, even if the session stays active
  - This feature was enabled in the 21R1 release except on production domains which have at least one Align Vault

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Commercial Data Model Changes

- Added new shared document field CRM Product Group
- Updated the Allow the user to select multiple values checkbox to be editable for the following shared fields – applies to PromoMats & MedComms Vaults:
  - CRM Product
  - CRM Product Group
  - CRM Detail Group
- Added the following new shared document fields to PromoMats Vaults:
  - Material ID
  - Revision
  - Promotional Material ID
- Added new entry action and event action Update Revision & Material ID
- Converted the Text Element Content field on the Content Module Asset object from long text to rich text

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Commercial Data Model Changes

- Added the following components to PromoMats vaults to support the Modular Content: Approval Document feature:
  - Converted the Text Element Content field on the Content Module Asset object from long text to rich text
  - Added new Generate Approval Documents notification
  - Added new Generate Approval Document user action
  - Added new document type Approval Document
- Added the following components to PromoMats vaults to support the PromoMats & RIM Vault Connection feature:
  - Added new object Submission
  - Added Actual Submitted Date, Primary Submission, and Submission Notes fields
  - Added a new object record for Promotional Material Document Type
  - Added new document type group PromoMats to Rim Connection
  - Added the new connection PromoMats to RIM
  - Added the following new integrations:
    - RIM Application Integration
    - PromoMats Contact Integration
    - PromoMats Compliance Package Integration

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Commercial Data Model Changes

- Added the following components to PromoMats vaults to support the PromoMats & RIM Vault Connection feature:
  - Added the following new integration points:
    - RIM Application Inbound Integration Point
    - PromoMats Contact Outbound Integration Point
    - RIM Submission Inbound Integration Point
    - PromoMats Submission Outbound Integration Point
    - PromoMats Compliance Package Outbound Integration Point
  - Added the following new queue connections:
    - PromoMats to RIM Outbound Queue
    - RIM to PromoMats Inbound Queue
  - Added the following new integration rules:
    - RIM Submission Integration Rule
    - RIM Application Integration Rule
    - RIM Applicant Update Integration Rule
    - RIM Applicant Integration Rule

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Commercial Data Model Changes

- Added the following components to MedComms and PromoMats to support the CRM Approved Links feature:
  - Added new picklist value Approve Links to the Distribution Channel Type picklist
  - Added new object record Approved Links to Website object
  - Added new field layout section Approved Links
  - Added the following shared document fields:
    - Shareable as an Approved Link
    - Message
    - Link Label

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Commercial Data Model Changes

- Considerations
  - Admin will need to change CRM shared fields to multi-select if needed
  - Material ID:
    - New shared document fields in PromoMats allow up versioning past v1.0 for promotional materials submitted to health authorities
    - Material ID requires configuration

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Platform Data Model Changes

- Added the following components to support the Suggested Links to Permalink Targets:
  - Added the Permalink value to the Reference Type picklist
- Enables references on Claims which target the latest version of a document, page, bookmark, or named destination using Permalink Target
- Links will self-update as the target is updated when using Suggested Links action
- Added the following fields to the EDL and EDL Item objects to support the Dynamic Template to Create Requirements feature in RegulatoryOne:
  - Registration Item
  - Registration Item Requirement
  - Requirement

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Platform Data Model Changes

- Added component to support the Share My Inbox Documents feature:
  - Share Inbox Documents object is used for persisting inbox sharing rules
  - This object has its configuration locked down and has types enabled
  - The object has the following fields:
    - User
    - Shared with User
    - Shared with Group
    - Locked
- Added the new object Scheduled Data Exports to support the Scheduled Data Exports feature
- Added the following items to support the Checklists: Welcome Notification Templates feature
  - Added the following fields to the Checklist Design object:
    - Welcome Email Subject
    - Welcome Email Text
    - Welcome Notification Text
  - Added the items listed above as lookup fields on each Checklist runtime object and object type
  - Added a new notification for each Checklist runtime object

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Platform Data Model Changes

- The Document Inbox Enhancements feature made the following updates:
  - The Undefined document type has not been automatically relabeled in existing vaults, but in all new vaults (and in Vault Help) it is now called Unclassified
  - The Unclassified document lifecycle has not been automatically relabeled in existing vaults, but in all new vaults (and in Vault Help) it is now called Inbox
  - The Unclassified document type (formerly known as Undefined) is now visible in the document types admin page, where you can edit its details and assign document fields
- The Check Out to File Manager user permission is now called Vault File Manager
- A new Doc Info Panel MDL component is visible on the Field Layouts document admin page, however the component currently has no functional benefit for now and forms the basis for a future page layout engine, denoting which Panel a particular section or control belongs to

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Platform Data Model Changes

- Considerations
  - Suggested Links to Permalink Targets:
    - Cannot target version-specific elements
    - Always links to the latest version regardless of status
    - Target document type must be enabled to add Claim
    - Must have Linking to Permalinks and Suggested Links enabled in Vault
  - Document Inbox Enhancements:
    - Recommend updating the label for the Undefined document type to Unclassified in admin
    - Recommend updating the label for the Unclassified document lifecycle to Inbox in admin
    - The Unclassified document type (formerly known as Undefined) is now a child of Base Document, so it will inherit all Base Document fields and can be edited in admin

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