

21R2 Commercial & Medical Release Deep Dive

July 2021





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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 Medical 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 <i>Vault File Manager does not release at this time, and instead releases with the general release PODs</i>
August 6	Release to all general release PODs





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](#)

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

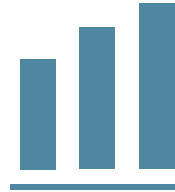
Projects in-flight to think about building workflows in One Workflow



21R2: Office Online Support



21R2 Office Online
Support stops



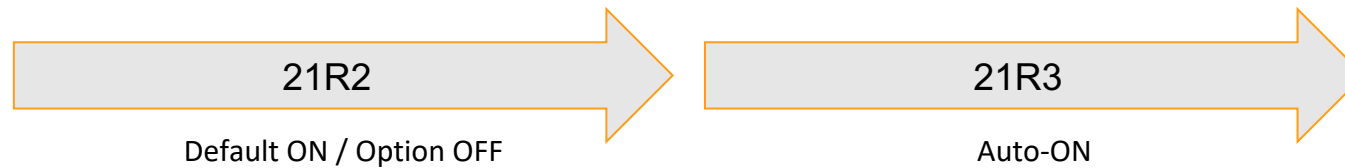
Collaborative Authoring
replaces Office Online



Users can check back in
until 21R3

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)**

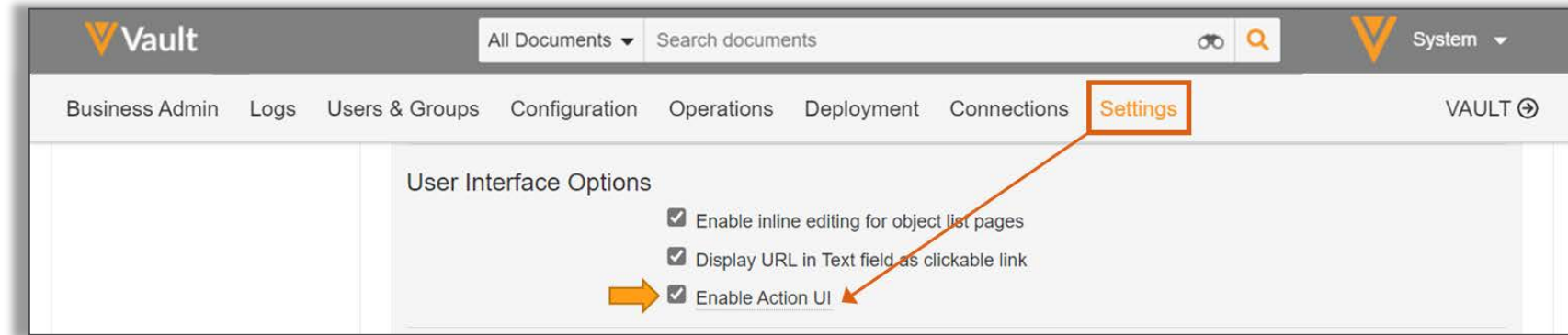




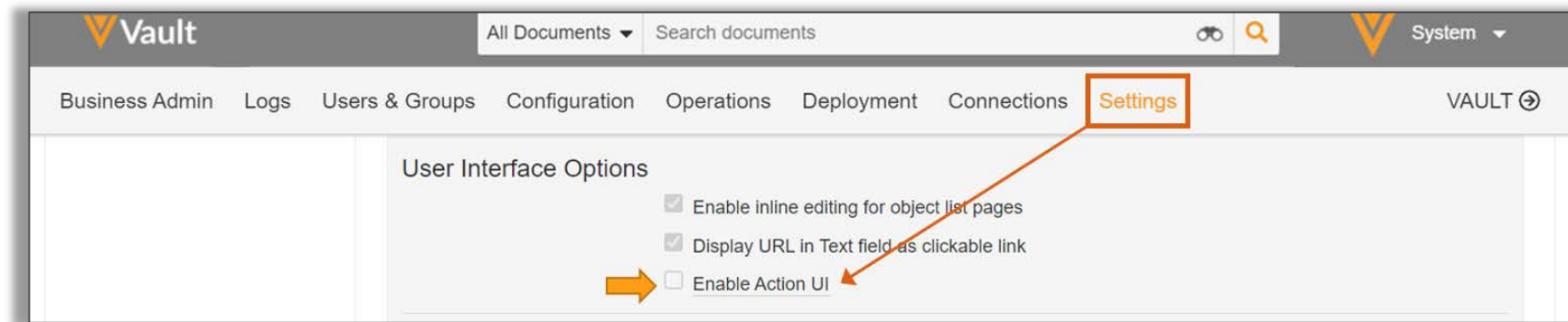
Action UI

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



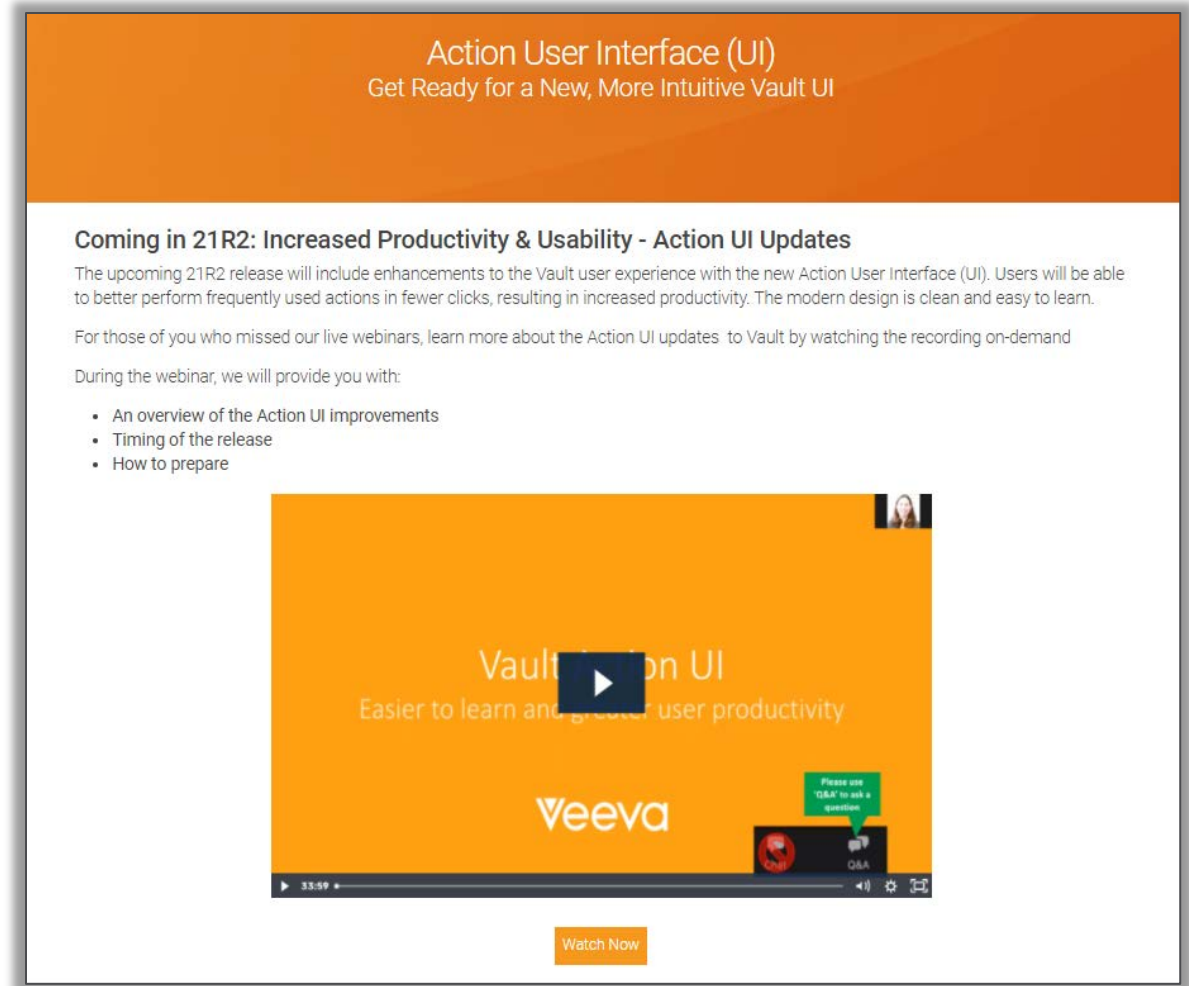
- Feature Setting Disabled by Admin: Action UI will not be visible to any users in this Vault



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

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



Action UI Highlights

The screenshot displays the Vault Action UI interface. The header includes the Vault logo, a search bar, and navigation links. The main content area shows a document titled 'VZD 2.7.3 (v1.0)' with an 'Approved' status. A progress bar indicates the document's lifecycle stages: Draft, Authoring, Review, and Approved. The document content includes a 'TABLE OF CONTENTS' section. The right sidebar displays document metadata. Callouts highlight specific UI elements: 'Updated Header' points to the top navigation bar; 'Notification Badge' points to a bell icon; 'New Action Bar' points to a set of icons above the progress bar; 'Updated Action Menu' points to a vertical menu on the right; and 'Document Toolbars' points to a toolbar within the document content area.

Updated Header

Notification Badge

New Action Bar

Updated Action Menu

Document Toolbars

Vault

All Documents Search All Documents

Home Library Reports Dashboards Loader Products

+ Create

1 of 4 documents in this list

VZD 2.7.3 (v1.0) Approved

Draft Authoring Review Approved

1 of 3

2.7.3 Summary of Clinical Efficacy [Product name]

TABLE OF CONTENTS

2.7.3 SUMMARY OF CLINICAL EFFICACY 2

2.7.3.1 Background and Overview of Clinical Efficacy 2

2.7.3.2 Summary of Results of Individual Studies 2

2.7.3.3 Comparison and Analyses of Results Across Studies 2

2.7.3.3.1 Study Populations 2

2.7.3.3.2 Comparison of Efficacy Results of all Studies 2

2.7.3.3.3 Comparison of Results in Subpopulations 2

INFORMATION

General

Name VZD 2.7.3

Title

Type General Documents

Reclassify

Document Number VV-00004

Created By Mary Anne Potok on 6/11/2021 10:46 AM EDT

Last Modified By System on 6/17/2021 7:46 PM EDT

Version 1.0

Lifecycle General Lifecycle

Status Approved



Object Record Overview

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

The screenshot displays the Veeva Vault interface for a Product Record. The top navigation bar includes the Vault logo, a 'Products' dropdown, a search bar, and icons for 'Action UI', a shopping cart, a notification bell, and a user profile. Below the navigation bar, a breadcrumb trail shows 'Products >'. The main content area is divided into a left sidebar with 'Details' and 'Workflow Timeline' tabs, and a main panel showing product details. The product details include 'Product Name: Cholecap', 'Status: Active', 'Product Abbreviation: CC', 'Last Modified By: Bob Ng', 'Last Modified Date: 5/19/2021 6:23 PM EDT', and 'Expected Date'. The Action Bar at the top right of the main panel contains a '+ Create' button, a settings gear, and a series of icons for actions. Annotations highlight specific features: 'State Change Dropdown' points to the 'Market' dropdown; 'Workflow and State Change Menu' points to the workflow icon; 'Most Frequently Used Object Actions' points to the key, document, and edit icons; and 'All Available Object Actions' points to the three-dot menu icon.

Vault

Products Search Products

Action UI

Home Library Reports Dashboards Loader Products

+ Create

Products >

★ Product: Cholecap Market

State Change Dropdown

Workflow and State Change Menu

3 of 27 records in this list

Details

Workflow Timeline

▼ Details

Product Name Cholecap

Last Modified By Bob Ng

Status Active

Last Modified Date 5/19/2021 6:23 PM EDT

Product Abbreviation CC

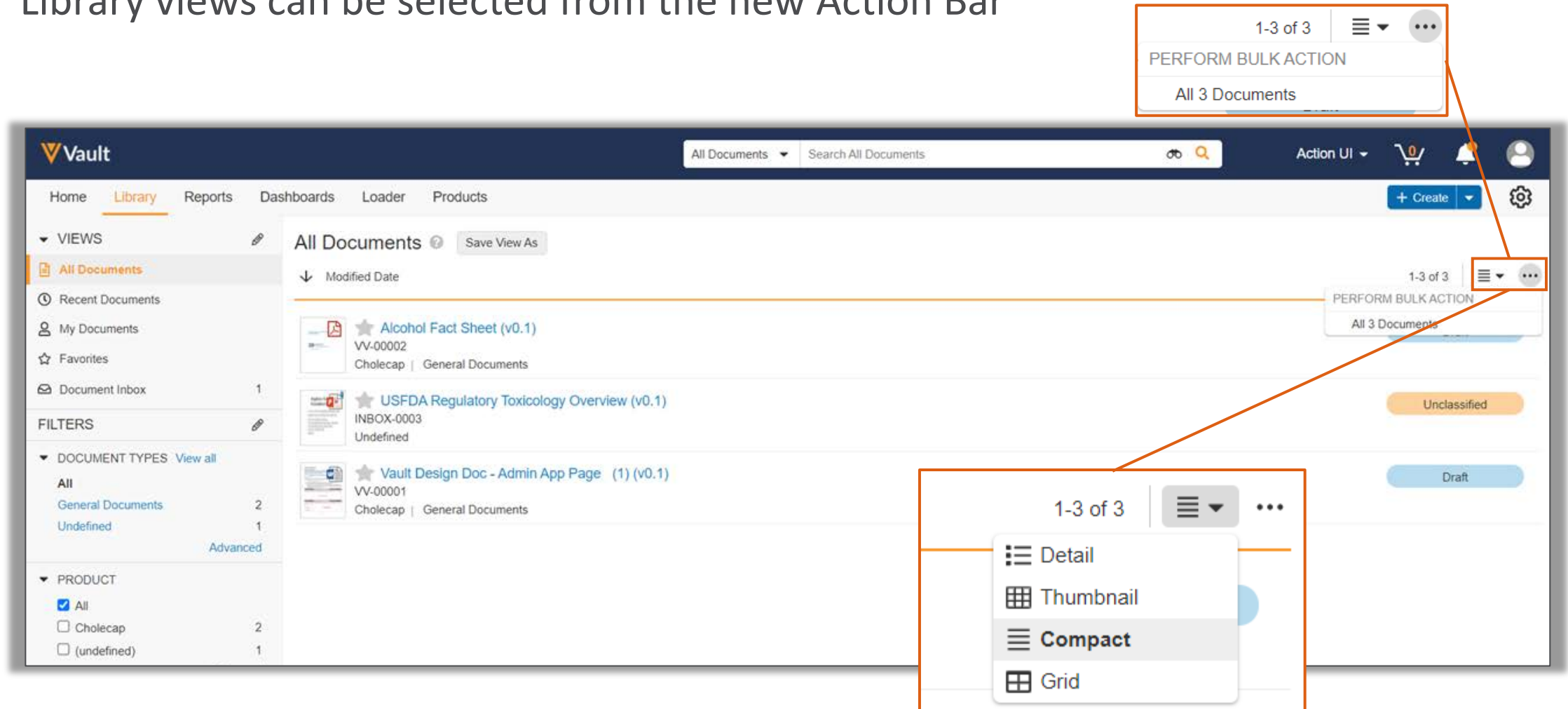
Expected Date

Most Frequently Used Object Actions

All Available Object Actions

Library Overview

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



Document Information

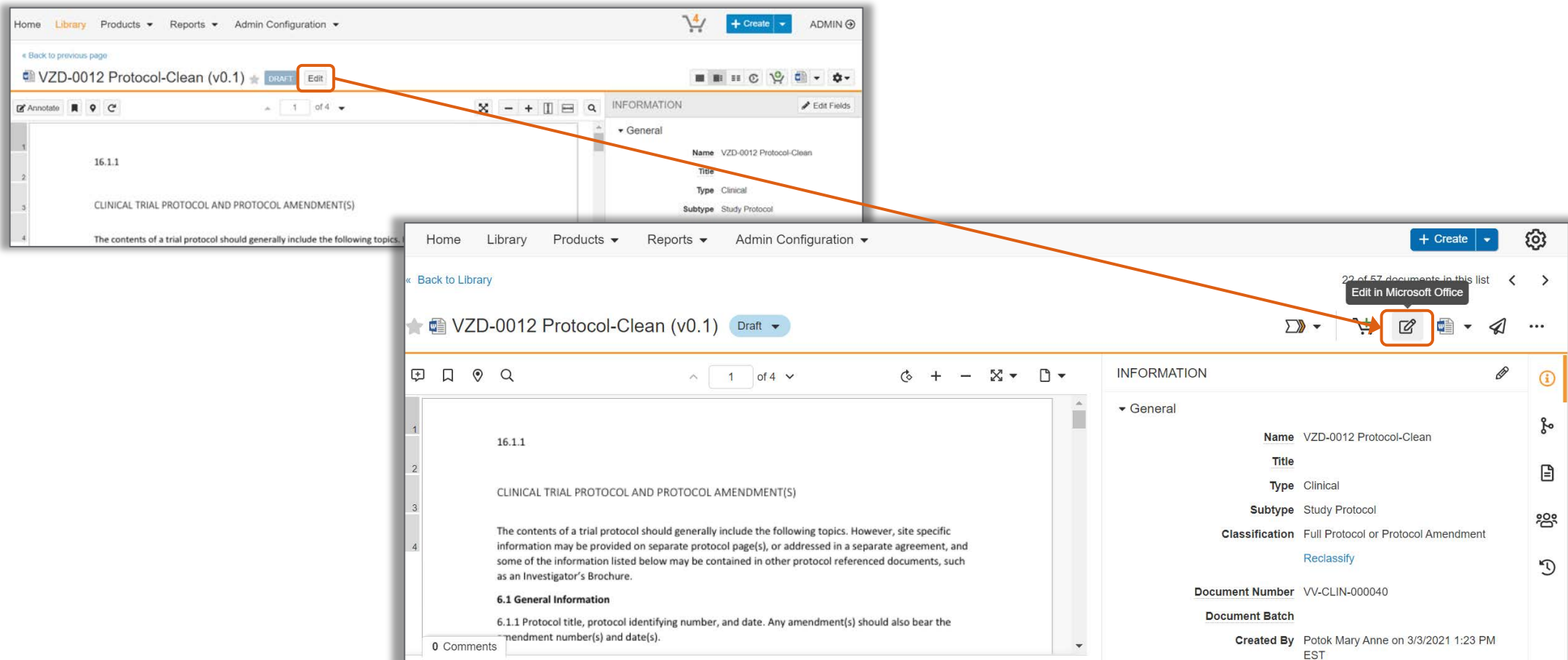
- The Doc Info pane can be collapsed or expanded, and users can click and drag to resize the pane

The screenshot shows the Veeva Vault interface for document 'VZD 2.7.3 (v1.0)'. The document is in the 'Approved' state. The main content area is split into two panes. The left pane displays the document content, including a 'TABLE OF CONTENTS' section. The right pane, titled 'INFORMATION', shows document details such as Name, Title, Type, Document Number, Created By, Last Modified By, Version, Lifecycle, and Status. An orange arrow points to the vertical line between the two panes, indicating that it can be clicked and dragged to resize the panes.

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

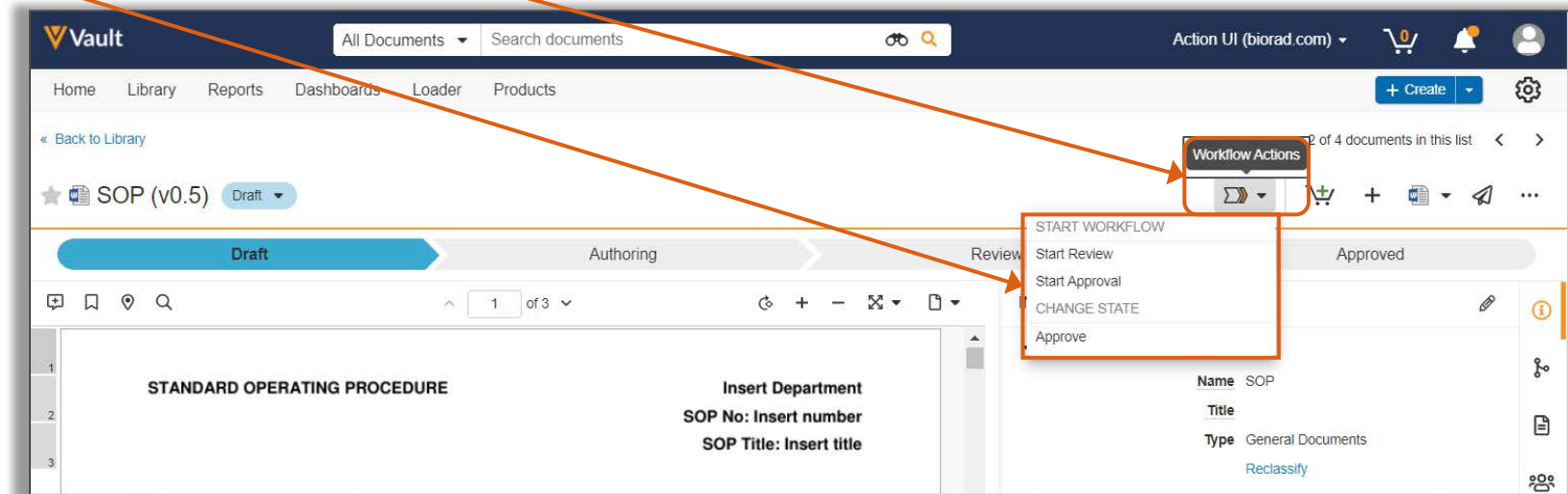
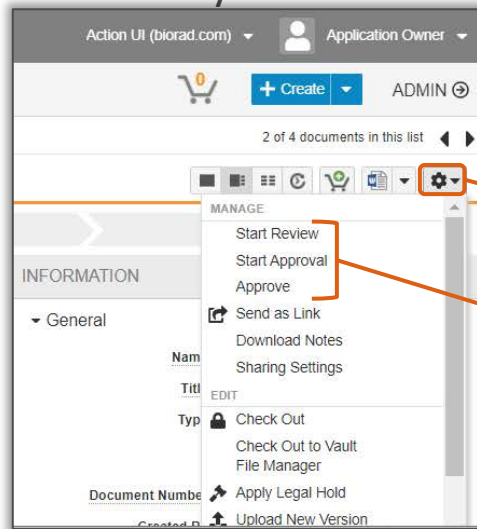
Collaborative Authoring

- 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



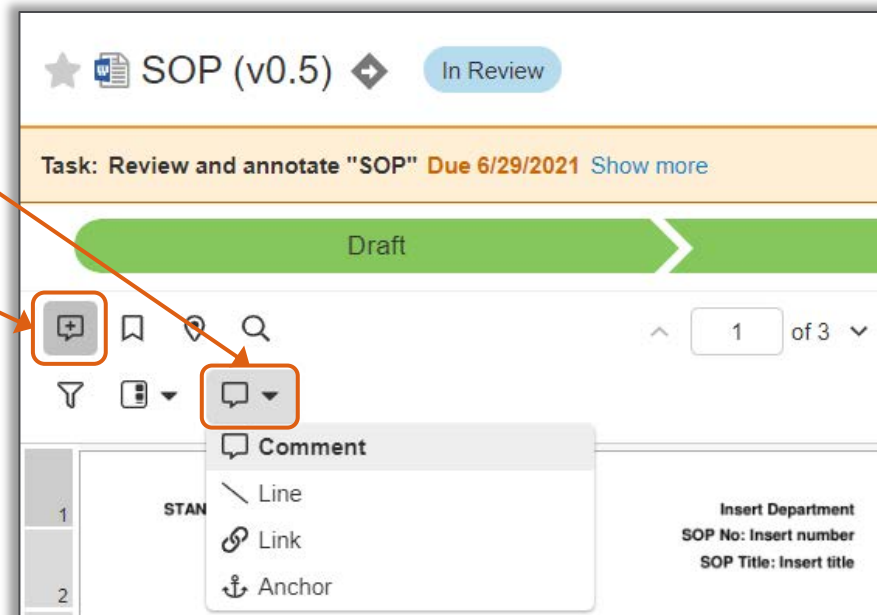
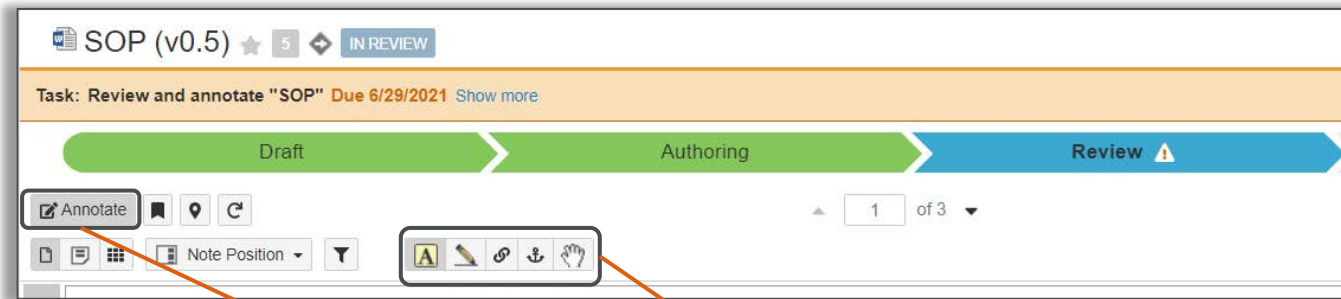
Document Lifecycles and Workflows

- 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



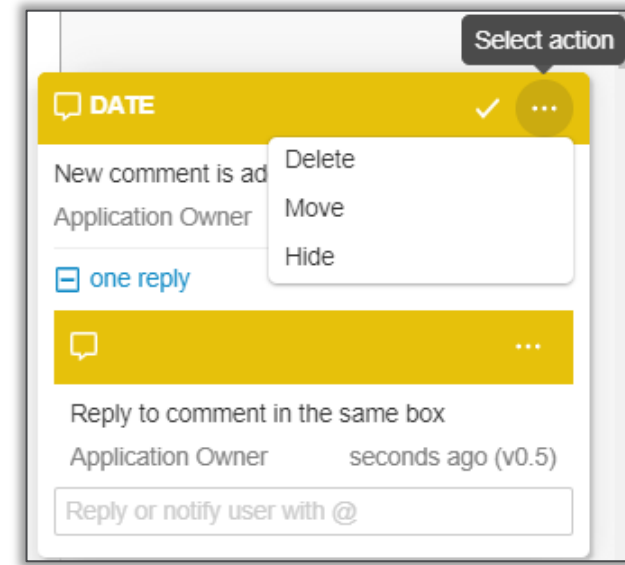
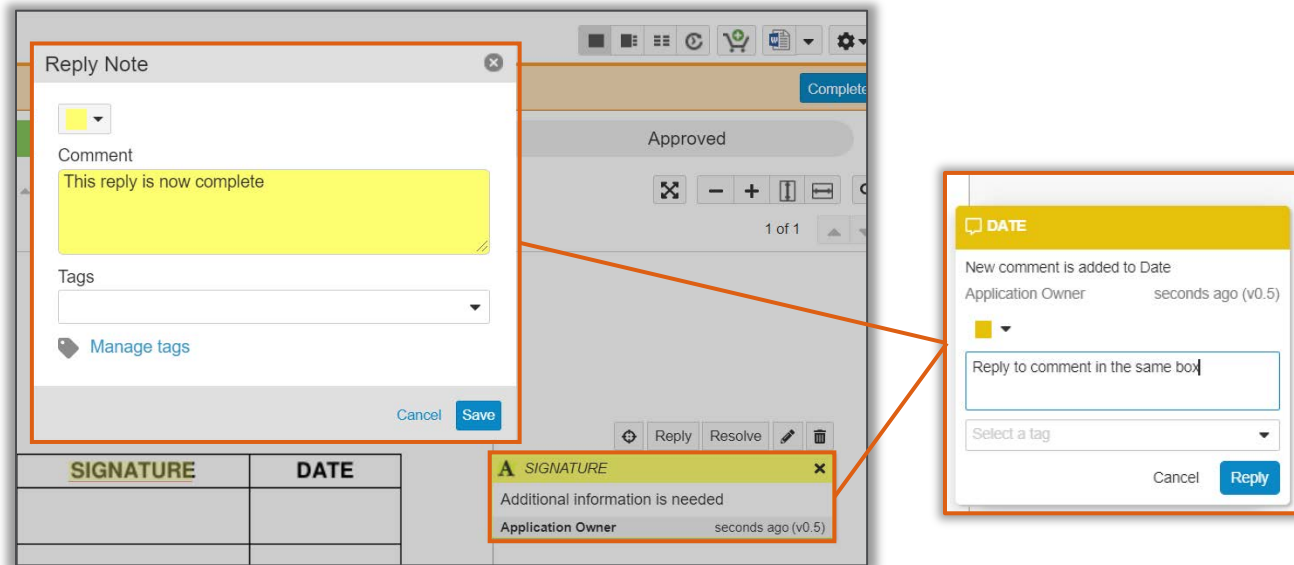
Annotations

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



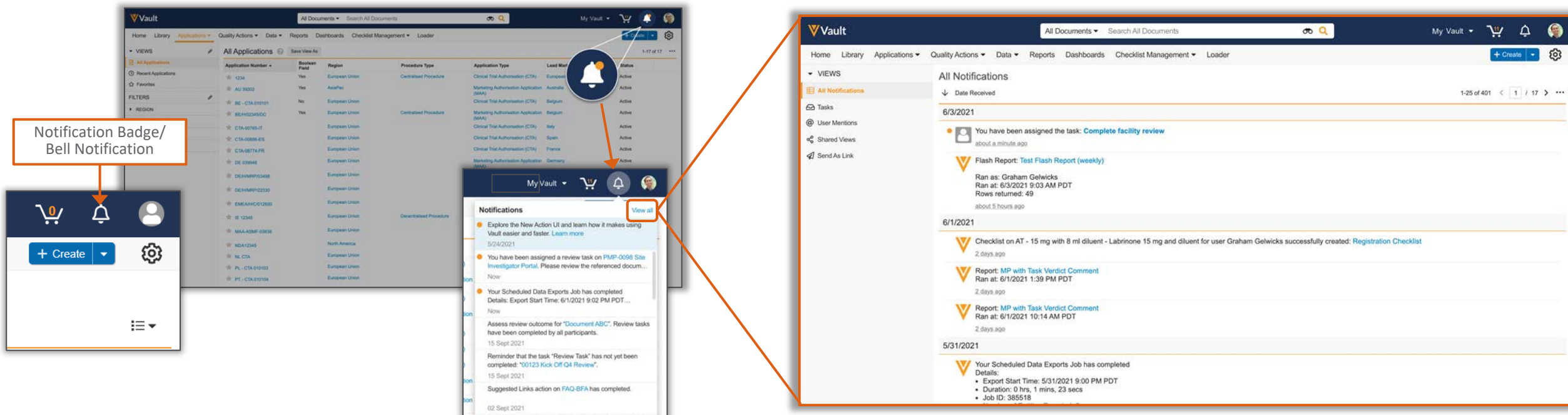
Annotations

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



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



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

Veeva Vault

Release Notes

Explore Action UI and discover easier and more productive ways to use Vault

Action Bar

Continuously learns how each user works and shows their most-used actions right on top and easily accessible with large, recognizable icon buttons. The Action Bar also helps make users more aware of workflow actions they can perform, such as starting available workflows or changing lifecycle states, by dynamically showing a workflow actions button. The Action Bar is available for object records and documents to help users perform important actions easier and faster.

[Learn More](#)

Vault Quality

All Documents Search All Documents

Home Library **Create Event** Quality Actions Data Reports Dashboards Checklist Management Loader

Quality Events

Complaint: QE-000001 Submit

Workflow Timeline

Intake

Follow-up Details

Products / Batches (1)

Materials / Assets (1)

CAPA Actions (1)

Investigation (1)

Summary and Conclusion

Risk Clause (0)

Related Quality Events (0)

Extension Requests (0)

System Details

Attachments (0)

Signatures (0)

Sharing Settings

Workflow Timeline

Intake

Name: QE-000001

Quality Event Type: Complaint

Initial Reporter: Sally Smith

Initial Report Date: 4/12/2021

Reporter Type: Pharmacol

Initial Contact Method: Email

Date of Event: 4/9/2021

Awareness Date: 4/9/2021

Customer Contact: Mike Jones

START WORKFLOW

Send for Review

CHANGE STATE

Change State to In Initial Review

Title: Incorrect ingredient used

Description: Box 1: Calculating the quantity of propylene glycol (PG) in a pharmaceutical product (in % w/w), with a worked example.

Some manufacturers state the amount of PG in part of product. The concentration in % w/w can be converted to % w/w using the [Show Note](#)

Type: Labeling






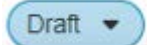




Potential Adverse Event: No

Owner: John Smith

Current Due Date: 8/25/2021

Original Due Date: 6/4/2021

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  



Documents



Infinite Document Scrolling

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

The image shows two screenshots of a document management interface. The top screenshot, labeled 'Before 21R2', shows a document with 32 pages. The navigation bar includes 'New', 'In Review', and 'Approved' stages. A 'Previous' button is highlighted with a red box, and a tooltip shows '1 - 25' and '26 - 32', indicating that pages are grouped into tranches of 25. The bottom screenshot, labeled 'As of 21R2', shows a document with 42 pages. The navigation bar includes 'Concept / Develop...', 'Quality Check (QC)', 'Review', and 'Approval' stages. A red box highlights the '1 of 42' page indicator, and a tooltip explains that the 25-page tranches have been removed, allowing for seamless scrolling through the entire document.

Before 21R2, Tranches of 25 pages are visible and users needed to navigate from one set or tranche of 25 pages

As of 21R2, the Tranches of 25 pages are removed and users can scroll seamlessly through the entire document

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



Prevent Reclassify for Checked-Out Documents

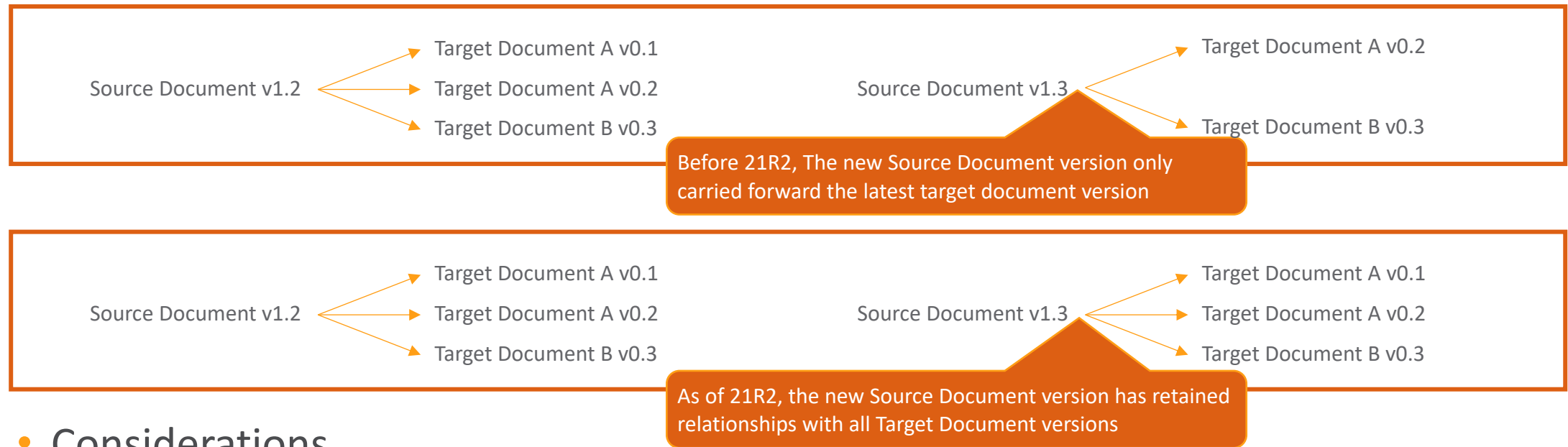
- This feature will prohibit checked-out documents from being reclassified while also preventing document field and lifecycle state changes from occurring

- 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



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](#)

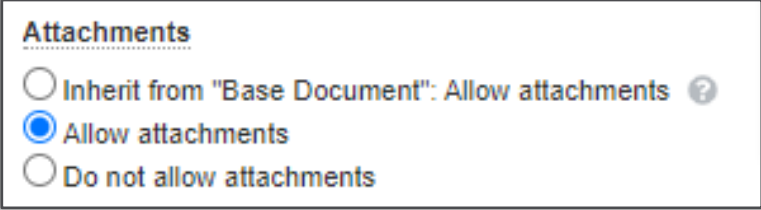
Reclassified Documents Always Retain Attachments

- 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



The screenshot shows a document reclassification interface. At the top, the 'Subtype' is 'Promotional Piece' and the 'Classification' is 'Advertisement'. A 'Reclassify' button is visible. An orange callout bubble points to the 'Reclassify' button with the text: 'When documents are reclassified, the attachments are retained'. Below the classification section, there is a section titled 'Attachments (2)' which lists two files: 'Proposed Package Insert Labeling VEEVAPROM Extended Release Tablets 200mg.pdf' and 'Video Rendition use case.docx'. Each file has icons for editing, settings, and downloading.

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



The screenshot shows the 'Attachments' settings for a document type. It features three radio button options: 'Inherit from "Base Document": Allow attachments' (which is disabled and has a question mark icon), 'Allow attachments' (which is selected), and 'Do not allow attachments'.



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

Veeva Systems Inc. 80 Hacienda Drive Pleasanton, CA 94588

June 24, 2021

TO: WHOM IT MAY CONCERN

The following are manufactured according to the following formula(s):

This is a multi-value parent object Brand Table with a Nested multi-value child object Product Table

Brand	Product	Ingredients	Units
<code>\$(vault:document_mf_brand_cr.name__v)</code>	<code>\$(vault:document_mf_brand_cr.mf_productnames__cr.name__v)</code>	<code>\$(vault:document_mf_brand_cr.mf_productnames__cr.mf_ingredients__cr.name__v)</code>	<code>\$(vault:document_mf_brand_cr.mf_productnames__cr.mf_ingredients__cr.units__c)</code>

The Nested Table only displays those Product records that are related to the Brand object in the Anchor column in the far left

Brand	Product	Ingredients	Units
Clinique	Clinique Pop™ Lip Colour + Primer	Lanolin Oil Trioctylidodecyl Citrate	34.234
	Almost Lipstick	Iron Oxides (Ci 77491, Ci 77492, Ci 77499) Blue 1 Lake (Ci 42090) [+/- Yellow 5 Lake (Ci 19140) Barium Sulfate	45.000 45.000 22.300 3.500

- 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

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

Audit trail for document US--2100019

Timestamp: [dropdown] all [dropdown] [Add filter] [Apply]

Showing events for 1/13/2021 to 6/16/2021 (66 results) [Settings]

Timestamp (M/d/yyyy)	User Name	Version	Event Description
6/16/2021 1:35 PM EDT	System	0.1	Days to Enter Review set to "0"
6/16/2021 1:35 PM EDT	System	0.1	Initial In Review Date set to "6/16/2021 10:35 AM PDT"
6/16/2021 1:35 PM EDT	System	0.1	Number of Review Cycles set to "1"
6/16/2021 1:35 PM EDT	System	0.1	Status changed from "Draft" to "In Review"
6/16/2021 1:35 PM EDT	jazmine.clarkin@vv-csm.com	0.1	"Review" (v1) workflow started
6/16/2021 1:35 PM EDT	jazmine.clarkin@vv-csm.com	0.1	"Review" "Due Date" set to 6/16/2021



Video Annotation: Claim Links

- Users can now create Claim Links on video documents

The screenshot shows the MoA Video (v1.0) interface. At the top, there's a status bar with 'APPROVED FOR DISTRIBUTION'. Below it, a navigation bar includes 'Submit to Health Au...', 'Approved', and 'Reapproval'. The main toolbar has 'Annotate', a filter icon, a warning icon, and a 'Document' dropdown menu. The 'Document' menu is open, showing 'Document' and 'Claim' options. The 'Claim' option is highlighted with an orange box, and an orange callout bubble points to it with the text: 'Create manual Claim Links to approved claim records and their associated references'. The background video player shows a video titled 'Cholecap' with a play button. At the bottom, there's a '0 Comments' section. A search results window is open, showing a table of claim links.

Search: Claim

Use search filters to refine results

Approved

Global

Cholecap

Clear Selection

Displaying 1-7 of 7

Name	Match Text	Category	Claim Restrictions
<input type="radio"/> CL-000012	Cholecap showed significant reduction in CV events (*) ...		In the US claim must ...
<input type="radio"/> CL-000017	Cholecap helps reduce the risk stroke	Adverse Event	
<input type="radio"/> CL-000020	Most common adverse events (*) weakness, dry mouth...	Adverse Event	
<input type="radio"/> CL-000021	Significant reduction in CV events (*) 42% stroke risk re...		
<input type="radio"/> CL-000040	2x more patients remained on cholecap therapy (*) com...		
<input type="radio"/> CL-000045	More doctors prescribe (*) than any other drug	Prohibited	
<input type="radio"/> CL-000046	Work (*) every time (*)	Prohibited	

Close

- 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)



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

The screenshot displays the 'Products and Claims Results' page in Veeva Vault. The interface includes a sidebar with 'VIEWS' (All Claims, Recent Claims, Favorites) and 'SECTIONS' (All Results, Products, Claims). The main content area shows search results for 'Cholecap' with filters and a table of products and claims. Callouts highlight specific UI features:

- Action menu on each section:** Points to the gear icon in the top right corner of the table sections.
- Inline editing available:** Points to the 'veevastatin' cell in the 'Generic Name' column, which is highlighted with a blue border and a pencil icon.
- Non editable fields are not available for inline editing (lock icon):** Points to the 'CholeCap 50mg' cell in the 'Application' column, which has a lock icon.
- Truncate or wrap cell text:** Points to the 'VIEW' dropdown menu, which includes options like 'Truncate Cell Text' and 'Edit Columns'.
- Bulk actions:** Points to the 'PERFORM BULK ACTION' section in the dropdown menu, which includes options like 'All 18 records' and 'Current Page (10 records)'.
- Export:** Points to the 'EXPORT' section in the dropdown menu, which includes options like 'Text' and 'Excel'.

Product Name	Product Abbreviation	Generic Name	Therapeu...	Product ...	Application	Center
Cholecap	CC	veevastatin	Cardiology/Vascular Diseases	Cholecap Plus	Cholecap	CDER
Felinsulin	FIN	insulin veeline	Hematology		Cholecap	CDER

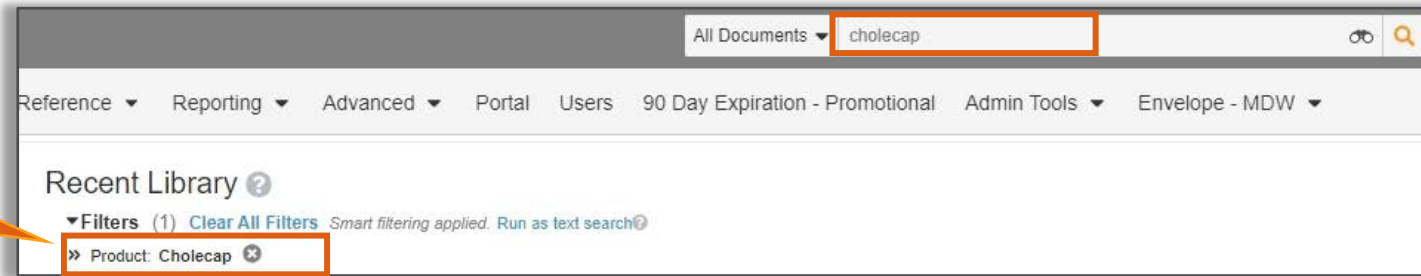
Smart Filter Enablement in Search Settings



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

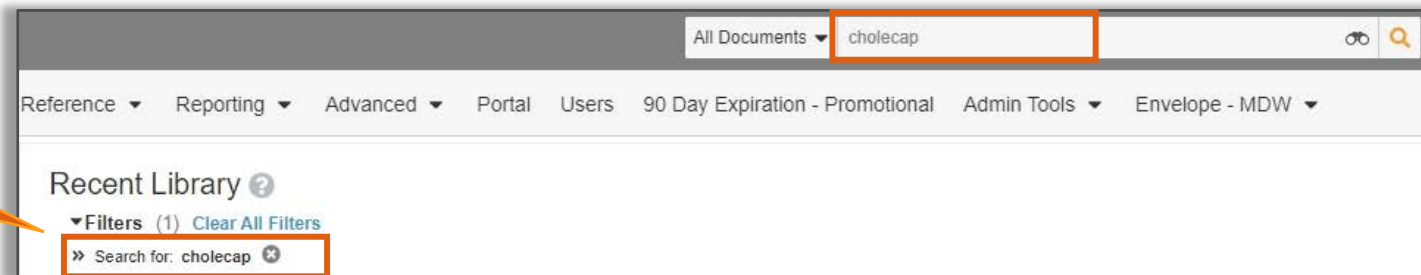
Smart Filters Enabled

- "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

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](#)

Business Admin | Logs | Users & Groups | Configuration | Operations | Deployment | Connections | **Settings**

VAULT SETTINGS

- General Settings
- Security Settings
- Checkout Settings
- Versioning Settings
- Branding Settings
- Search Settings**
- Language & Region Settings
- Rendition Settings
- Help Settings
- Application Settings
- Digital Publishing Settings
- CRM Rendition Settings
- Scheduled Data Export Settings

DOMAIN SETTINGS

- Security Policies
- Network Access Rules

Search Settings

Search Thesaurus ?

Language Please select Export

Thesaurus File Choose File No file chosen Import

Advanced Search Document Filters ?

- Filter 1 Claim Record
- Filter 2 Portal
- Filter 3 Product
- Filter 4 Review Meeting
- Filter 5

Match Settings

☒ Enable Strict Matching

☒ Enable Smart Filters

This will automatically apply filters to document results when searching for navigational terms like document types, lifecycle states, products or countries.



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 screenshot shows a report filter interface. At the top, there is a dropdown menu labeled 'FILTERS'. Below it, there is a search bar with three main components: a field selector, an operator dropdown, and a search input field. The field selector is labeled 'Document Name' and has a dropdown arrow. The operator dropdown is labeled 'contains' and also has a dropdown arrow. The search input field contains the text 'Brochure' and is highlighted in yellow. To the right of the search input field, there is a checkbox labeled 'Prompt' which is currently unchecked. Further to the right are two circular buttons, one with a minus sign and one with a plus sign.

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



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

Schedule Flash Report

Notice: All users with permission to view this report will see the same data as the scheduling user.

Run report
Daily

Preferred Start Time
12:00 AM CEST

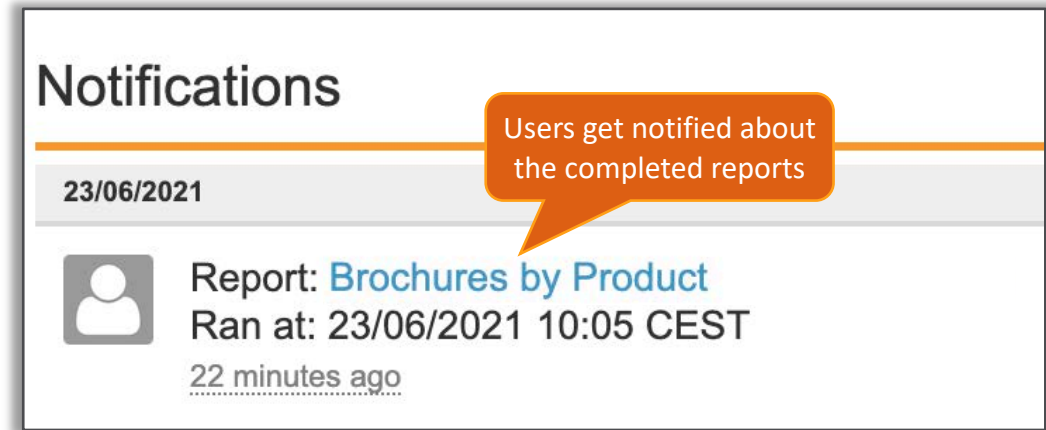
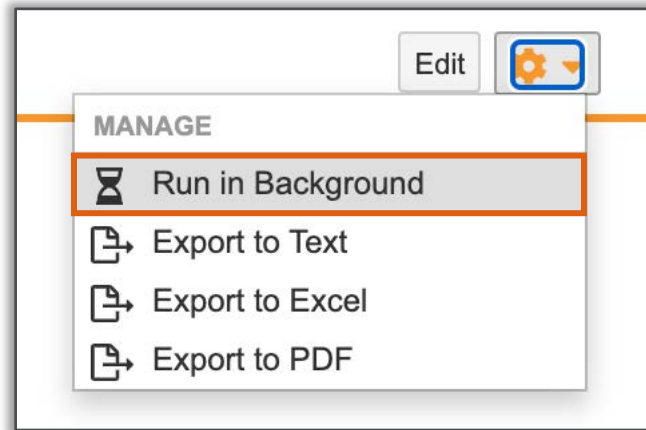
Schedule large reports outside business hours for best performance

Email and Vault notification preferences
Always send



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





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

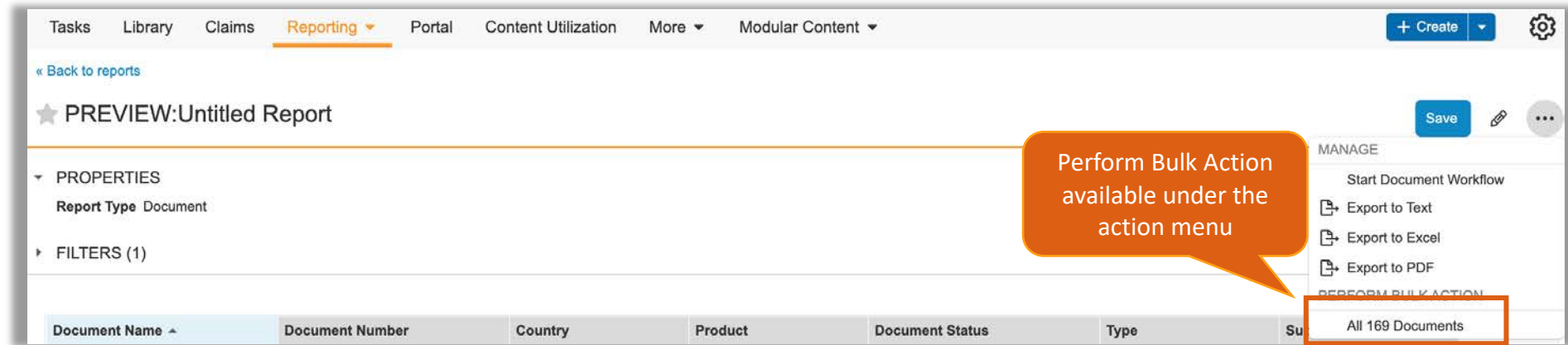
All Reports ? Save View As		
Name	ID	Public Key
★ Doc Exp	ORP000000018001	doc_exp__c
★ Average Task Duration by Role and Country	... ORP000000000108	average_task_duration_by_role_and_cou__c
★ Open Tasks	ORP000000016001	open_tasks__c

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



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

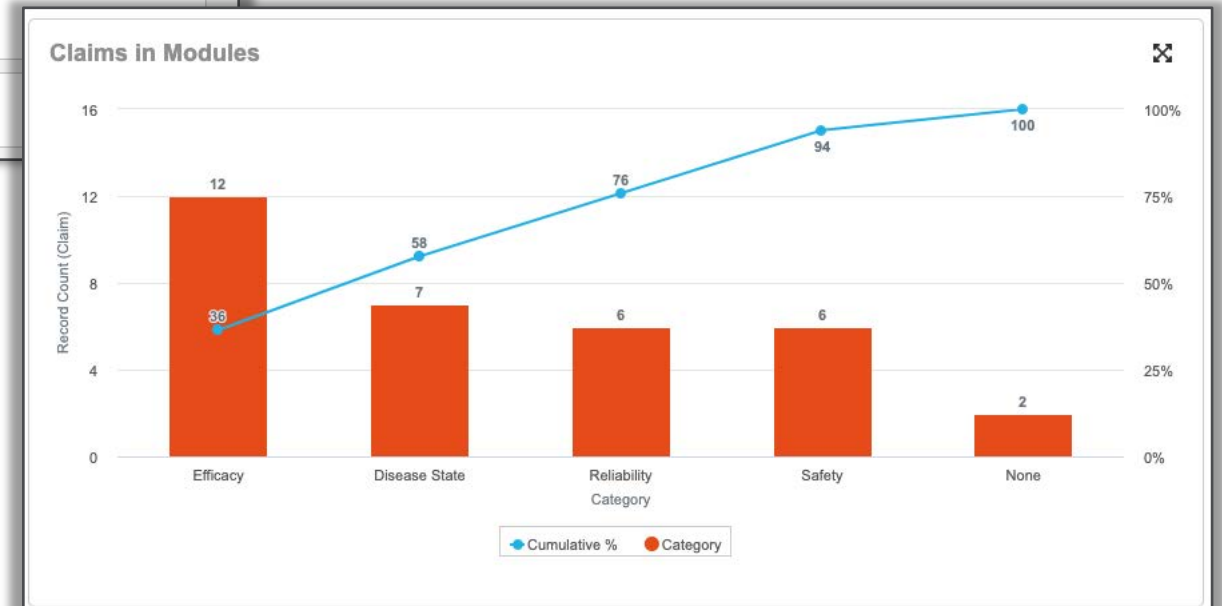
Reports with Multiple Down Objects in Dashboards



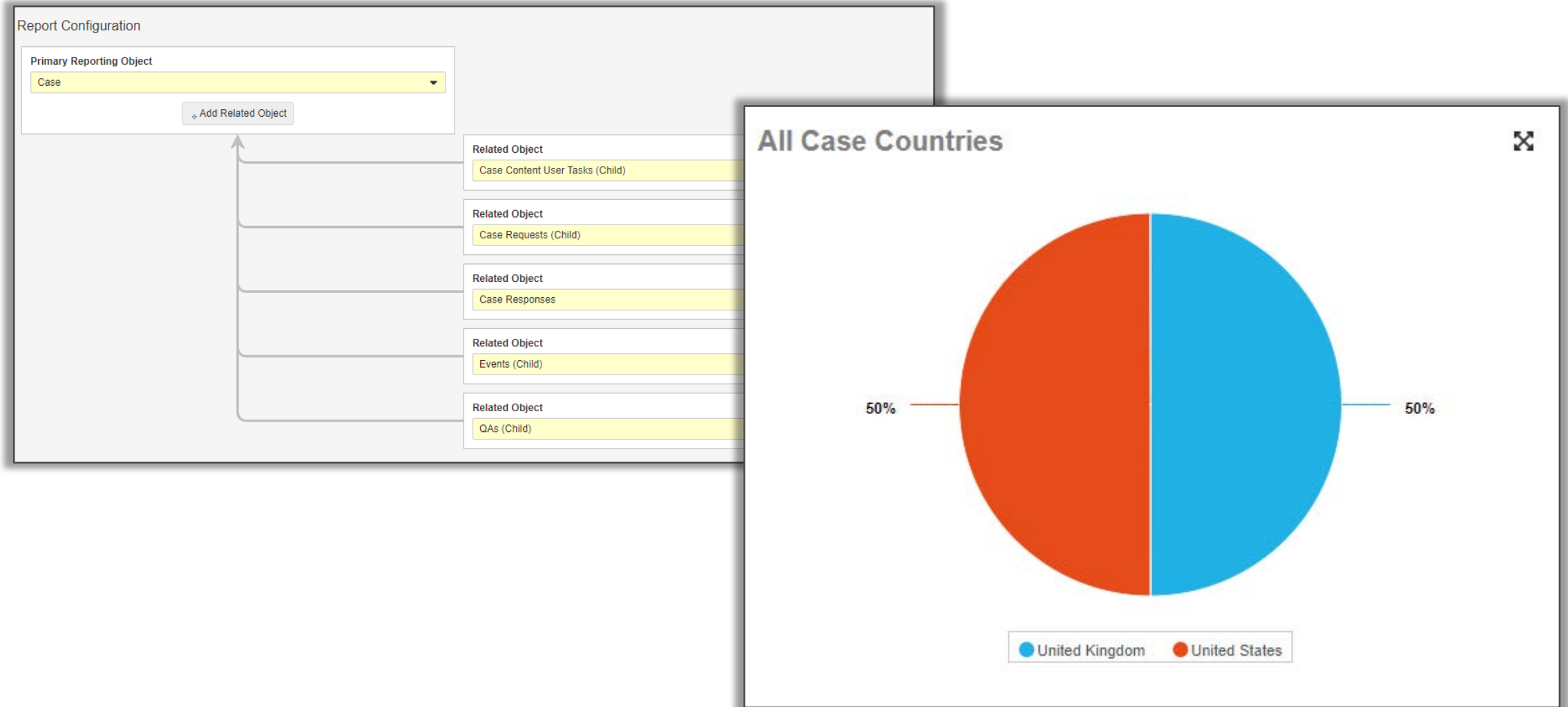
- Users are now able to create charts based on reports with multiple down objects that have outbound references to the primary reporting object

Report Configuration

Primary Reporting Object Claim	Related Object ModuleAsset ↓
	Related Object Match Text Variations (Child) ↓



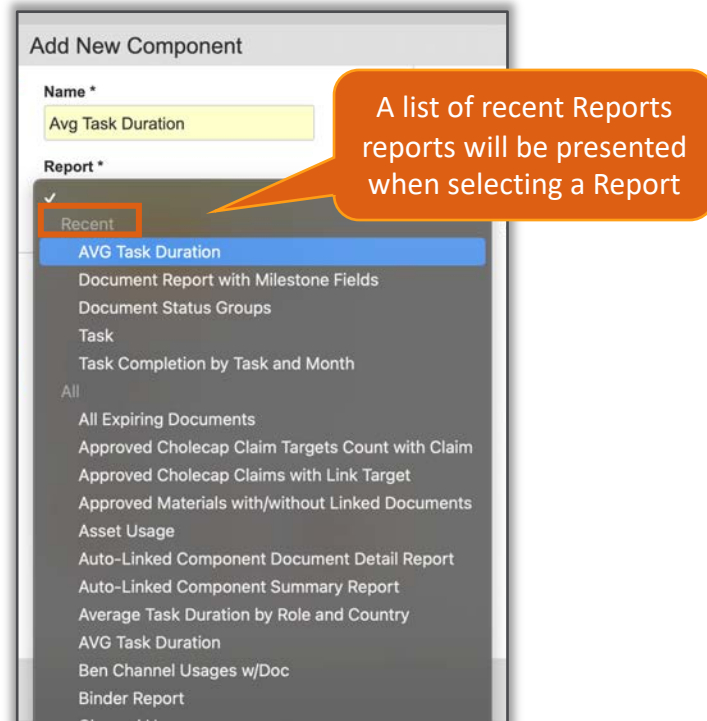
Reports with Multiple Down Objects in Dashboards



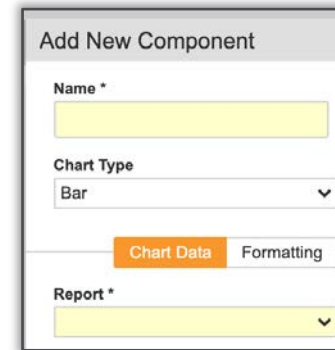


Dashboard Usability Enhancements

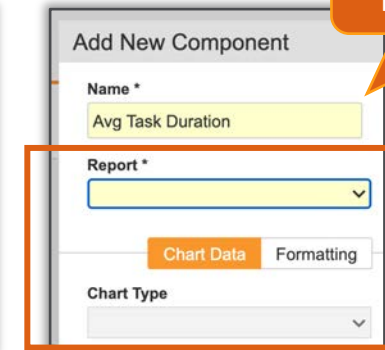
- This feature makes several aesthetic and usability enhancements to dashboards
 - A list of recent reports when selecting a report
 - The Report driving the Dashboard will be selected prior to selecting a Chart Type
 - Charts no longer include the grey header background
 - Vault displays full chart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



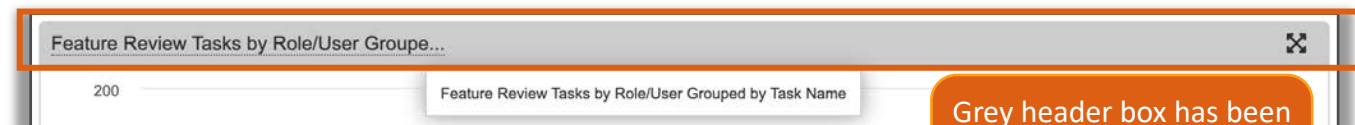
BEFORE



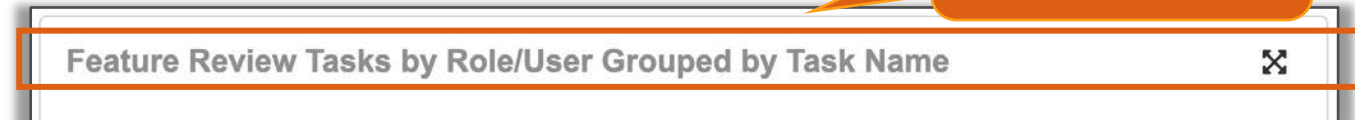
AFTER



BEFORE



AFTER





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

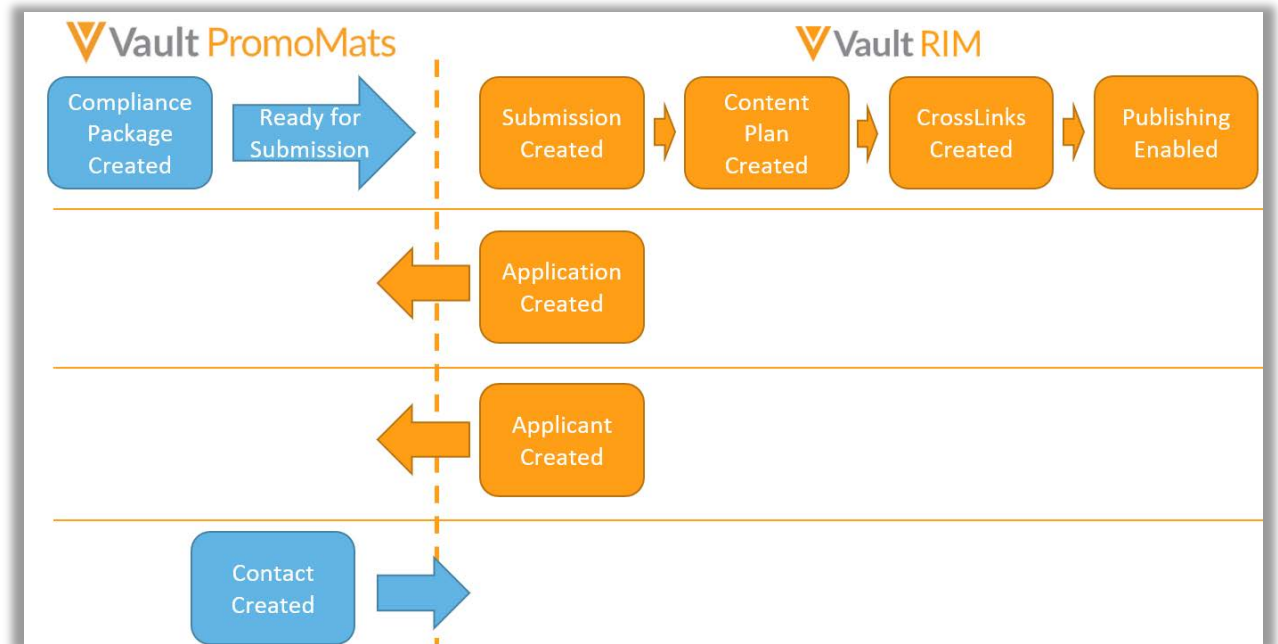
10. Typed Name and Title of Responsible Official or Agent Ramona Responsible	11. Signature of Responsible Official or Agent <div>Sign</div>	12. Date
13. For CBER Products Only (<i>Check one</i>) <div>Draft <input type="checkbox"/> <div>✕ Final <input checked="" type="checkbox"/></div></div>		

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



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





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 \(PromoMats\)](#)

▼ Submission Details

Submission Required?	Yes
Material Type	Carton
Professional / Consumer	Professional
One Off Use	No
Health Authority Decision	
Health Authority Decision Date	
Submission Type	FDA 2253
Dissemination / Publication Date	20/04/2021
Material ID	US-Chole-2100002-1
Revision	1
Update?	No



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

Claims >

Claim: CL-000004 ★ APPROVED

Details

References (4)

Match Text Variations (1)

Workflow Timeline

Where Used

Details

References

+ Add

Name	Reference Type	Document Version	Reference	Created By	Created Date
LT-000039	Anchor	Role of CholeCap (veevastatin) in Dysli...	1483021357881	CSM User	28/05/2021 11:57 BST
LT-000040	Permalink	4 Ways To Prepare For The European ...	V0V000000001001	CSM User	28/05/2021 12:08 BST
LT-000005	Document	Cholecap Prescribing Information (PI) (4...	(document)	PromoMats User	15/10/2019 07:03 BST
LT-000004	Document	Role of CholeCap (veevastatin) in Dysli...	(document)	PromoMats User	15/10/2019 07:03 BST

Claims >

Claim: CL-000004 ★ APPROVED

Details

References (4)

Match Text Variations (1)

Workflow Timeline

Where Used

Details

Reference

+ Add

Select targets

Fields

Filters

Document Name (A-Z)

1-25 of 125

1 / 5

2011-Gould-946-52 (v1.0)

REF-0063

General | Reference > Clinical Study

+ Select or create permalink in this document

4 Ways To Prepare For The European Medical Device Regulation (MDR) - Medic...

REF-0124

CarDeo | Reference > Literature Reference

+ Select or create permalink in this document

5 sticking points in the EU medical device reg transition _MedTech Dive (v0.1)

REF-0132

Reference > Literature Reference

+ Select or create permalink in this document

AHA Guideline on Treatment of Cholesterol (v1.0)

REF-0008

Cholecap | Reference > Literature Reference

+ Select or create permalink in this document

Anti-TNF Long Term Safety Study (v1.0)

REF-0041

Raxoipen | Reference > Clinical Study

+ Select or create permalink in this document

Close

When clicking 'Add' users can select Permalink as the target type



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

Documents

- ☒ Enable Duplicate Content Detection
- ☒ Create new documents as Planned
- ☒ Enable Original Source Tracking
- ☒ Enable Legal Hold
- ☒ Provision File Manager from Vault
- ☒ Enable check out to File Manager
- ☒ Allow Export All Files
- ☒ Enable Copy Link and unlock Permalink Object Type
 - ☒ Enable linking to permalinks
 - ☒ Enable Suggested Links
- ☒ For Suggested Links, bypass Approve step on exact matches
- ☒ Allow linking via selection of approved Annotation Keywords records
- ☒ Exclude specific characters when matching Annotation Keywords to content

Excluded Characters: ©®™SM†

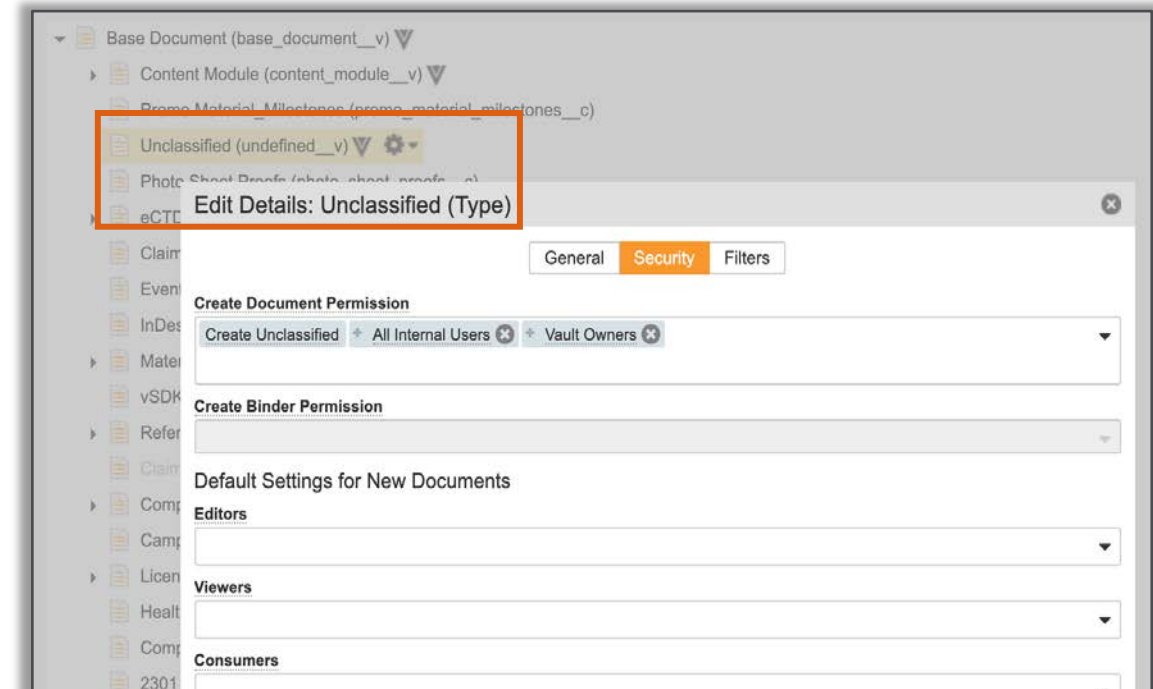


Document Inbox

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



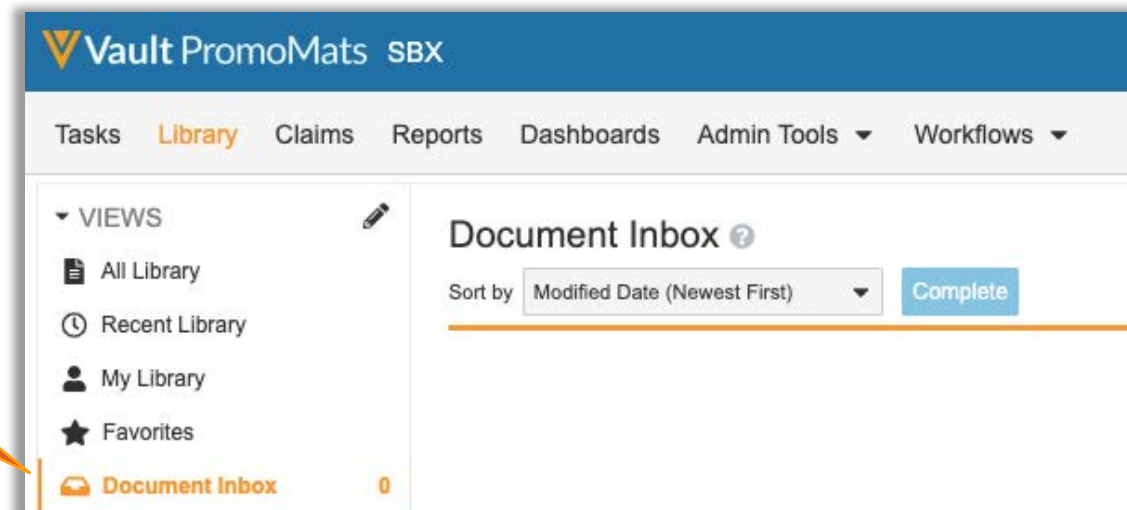
We recommend that customers update existing Vault configurations with the new labels



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

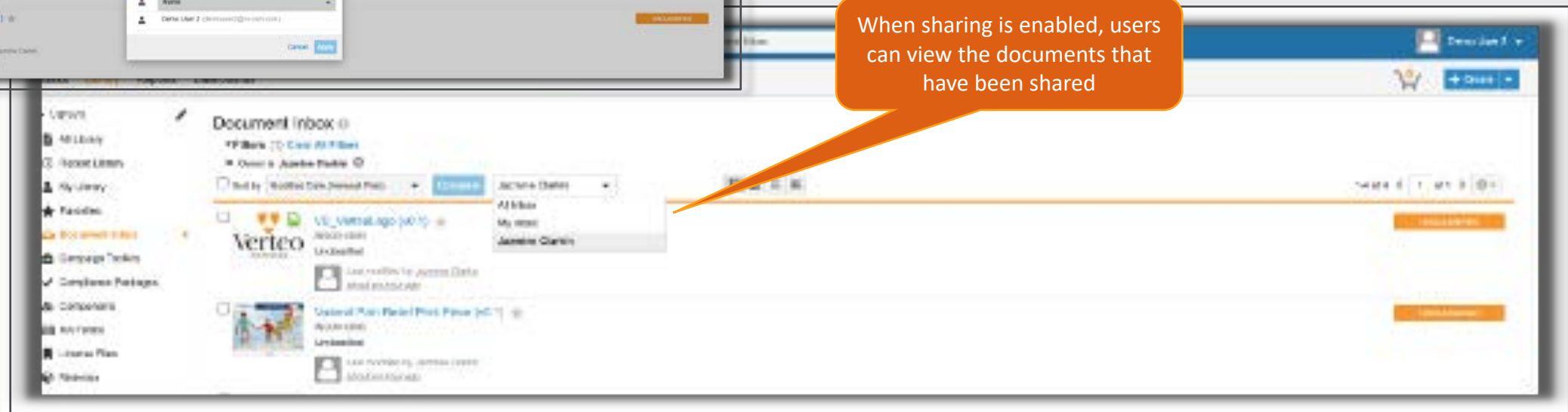
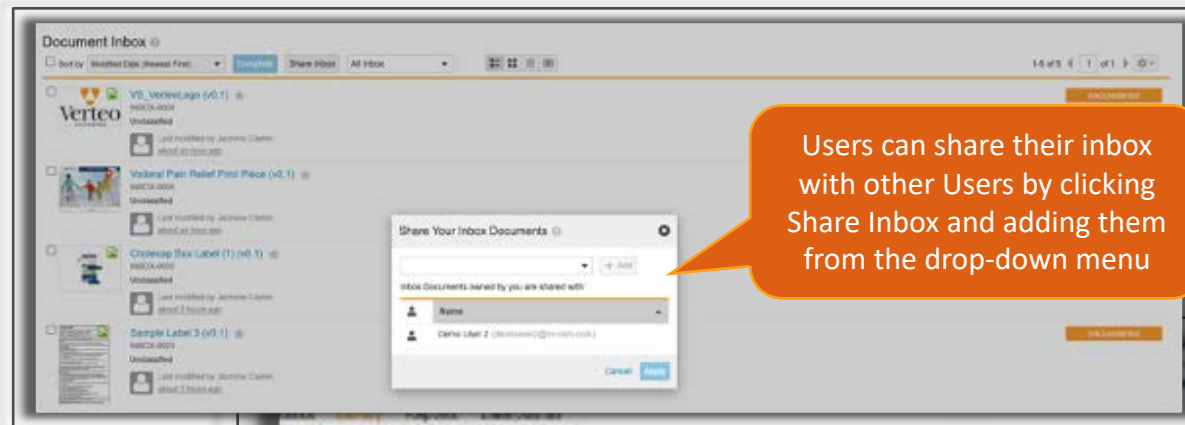
The Document Inbox tab can be found within the Library





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





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

Share Inbox: Add Groups or Users

-Details

User: Lauren Subik

Users and Groups

Locked ☒ Yes ☐ No

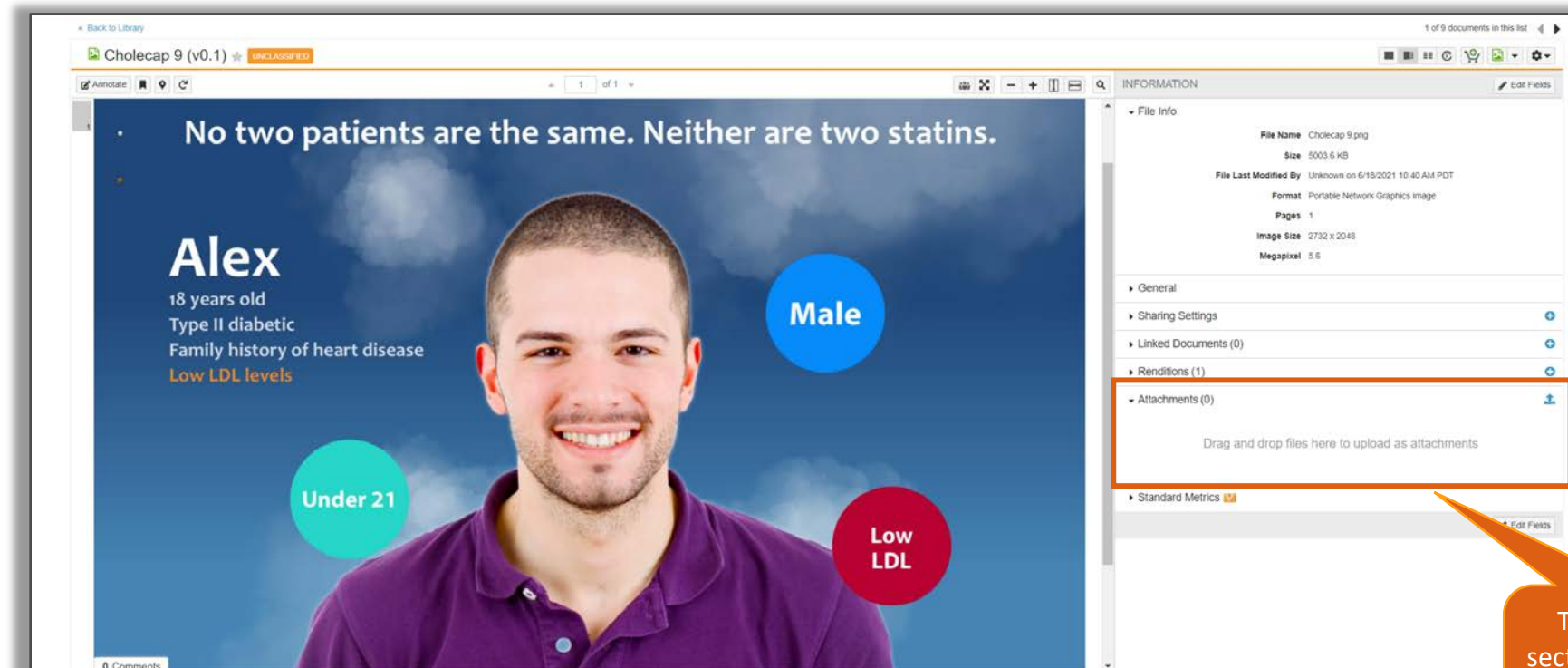
Cancel Save

Select which Users and Groups to add and if it is locked so end users cannot remove the selected users or groups

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

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

Edit Details: Unclassified (Type)

Unclassified

Rendition Types

Panoramic Thumbnail Custom Thumbnail Viewable Rendition Large Size Asset Unmodified Source

Relationship Types

Auto-Linked eCTD Source Original Source Linked Documents

Document Type Groups (Not inherited from parent. [Remove override](#) ?)

Global Content Type (Inherited from Base Document) ?

Binder Thumbnail Options

☒ Inherit from "Base Document": Do Not Display Binder Thumbnails. ?

☐ Display Binder Thumbnails

☐ Do Not Display Binder Thumbnails

Attachments

☒ Inherit from "Base Document": Allow attachments. ?

☐ Allow attachments

☐ Do not allow attachments

Enable "Suggested Links" Action

☒ Inherit from "Base Document": Do not enable action ?

☐ Enable action

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





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

Content Module: CM-000003 IN REVIEW

Complete Review 6/10/2021

Content Module - CM-000003 (v0.1) DRAFT

Content Module Approval Document: CM-000003

Module Last Modified: 2021-06-09 18:52:42 UTC

Content Module	
Name	CM-000003
Product	Natevba
Country	Global
Category	Efficacy
Description	
Usage Guidelines	

General

Name: Content Module - CM-000003

Description: (empty)

Document Number: CMAD-0001

Version: 0.1

Status: Draft

Country: Global

Product: Natevba

Lifecycle: Content Module Approval Document

Type: Content Module

Subtype: Approval Document

Last Modified By: CSM User on 6/9/2021 2:53 PM EDT

Created By: CSM User on 6/9/2021 2:53 PM EDT

Copy Depth: (empty)

Source Content Module: CM-000003

Lifecycle State Stage ID: (empty)

MANAGE

- Change State to Draft
- Generate Approval Document**
- Copy Record
- Configure Page Layout
- Delete
- Audit Trail

Approval Document summarizes all of the components of a Content Module

Generates Approval Document for Content Module



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

Object Lifecycles > Content Module Lifecycle > Approved >

User Actions ?

☒ Always ☐ Perform with conditions

Allow the following actions

Change State to ▼

In Review ▼

Action Label*

Change State to In Review

+ Add Action

☒ Always ☐ Perform with conditions

Allow the following actions

Generate Approval Document ▼

Action Label*

Generate Approval Document



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

The screenshot displays the 'Content Module Text Elements' interface. A 'Create Text' pop-up is open, showing a 'Details' section with fields for 'Name', 'Content Module Asset Type', 'Text Element Type', and 'Text Element Content'. The 'Text Element Content' field is highlighted with an orange box and a callout that says 'Opens an editing pop-up with all rich text tools exposed'. Below this, a rich text editor is visible with a toolbar containing options for font family, size, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, and undo. The text area shows a sample of rich text: 'Vincent A. Cancer Therapy and Mgmt. 2020 - In the phase III VENTURE trial, patients treated with Natevba had 25 .2 months PFS vs 14 .0 months in the SOC (chemotherapy) group. Natevba demonstrated a 45 % reduction in the risk of progression Veeva Natevdba'. A '5000 Character Limit' callout points to the character count at the bottom of the text area. The background shows a table of 'Text Element Content' with columns for 'Type' and 'Text Element Content', containing entries like 'HR = 0.55, 95% CI: 0.46 - 0.57 CI = confidence inte' and 'Natevba delivers over 2 years median PFS'.

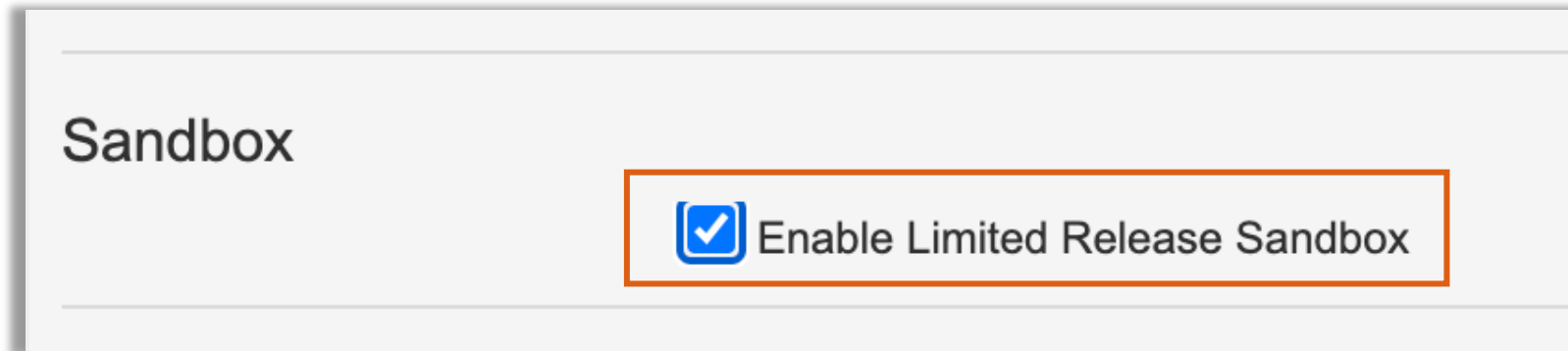


Admin

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

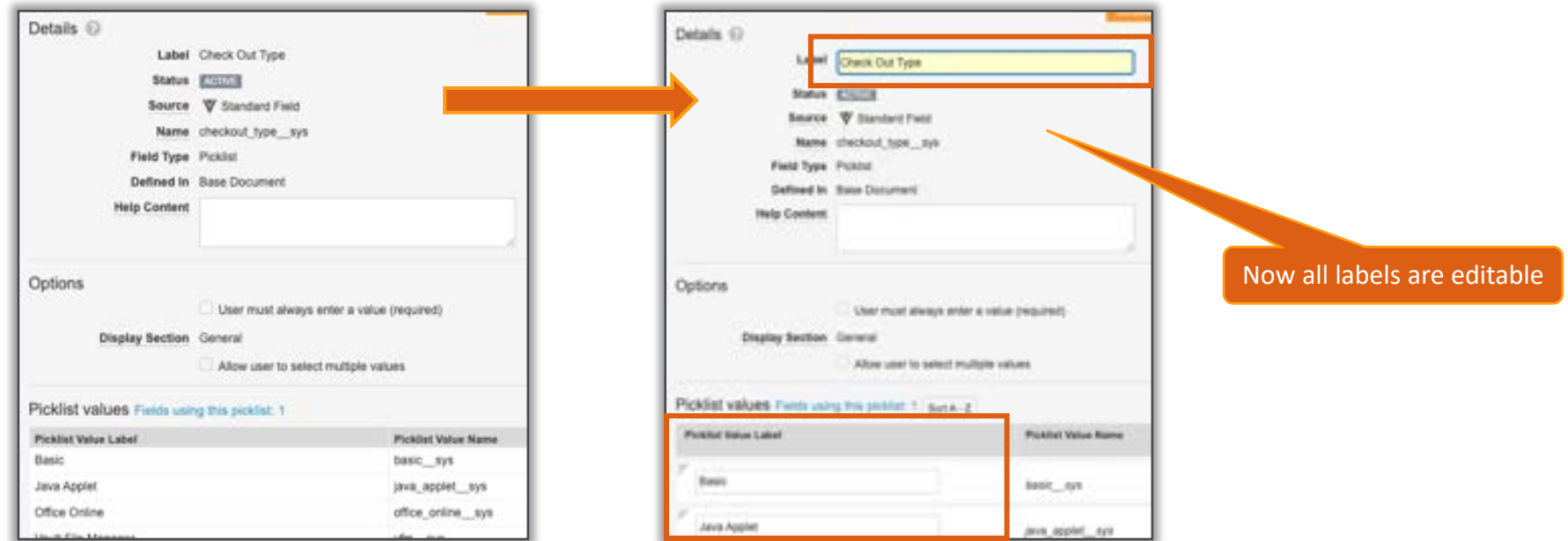


The Limited Release Sandbox feature allows organizations with General Release Vaults to create a Limited Release sandbox, giving them the ability to proactively assess new functionality ahead of each General Release

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

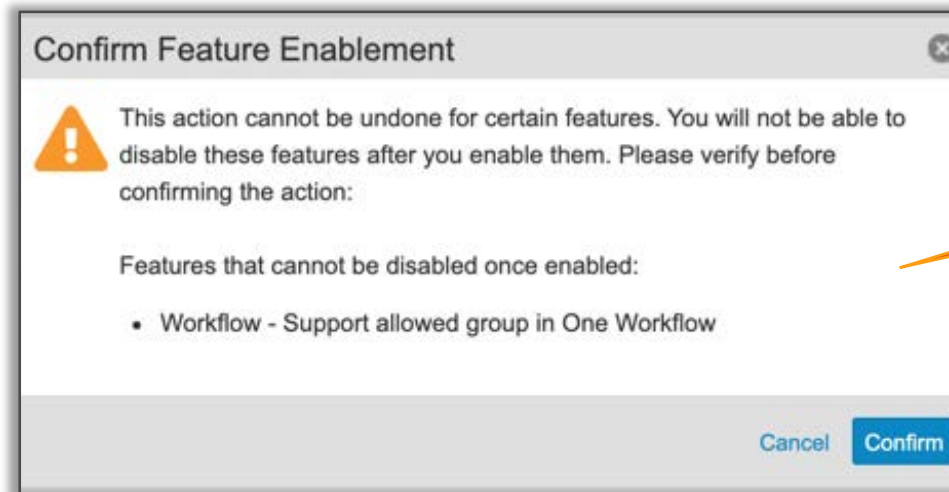


- Considerations
 - In previous releases, Admins could not edit the labels on all standard (__v) picklists and picklist values, even though this was possible via MDL and the bulk translation tools in Vault.
 - Once picklist labels are updated, verify that the configuration of field dependencies that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



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



This message will display when the Admin attempts to save the Settings page

The Admin must confirm to save the changes

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

Device Name ▲	Application	Device Model	Registration Date	Status
Igor's iPad	Vault Mobile	iPad Air 2	3/1/2021 9:53 PM PST	Enabled
Igor's Phone	Vault Mobile	Google Pixel 5	2/23/2021 12:11 PM PST	Enabled



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

Job Definitions >
Scheduled Data Exports

Details

Title* Scheduled Data Exports	Status* Active
Name* scheduled_data_exports__v	Type* Scheduled Data Exports
Job Owner* System	
Schedule* Daily	
Time* 12 : 00 AM (GMT-05:00) Eastern Standard Time ...	



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

Name	Size	Date
✓ ScheduledDataExports	21 KB	6/27/21, 7:16 A
✓ 2021-07-07_90030	10 KB	6/27/21, 7:16 A
34820_90030_activity__v_2021-07-07T11:45:25.197...	15 bytes	7/7/21, 6:45 PM
34820_90030_activity__v_2021-07-07T11:45:25.197...	546 bytes	7/7/21, 6:45 PM
34820_90030_documents__v_2021-07-07T11:45:25....	15 bytes	7/7/21, 6:45 PM
34820_90030_documents__v_2021-07-07T11:45:25....	7 KB	7/7/21, 6:45 PM
34820_90030_match_text_variation__sys_2021-07-...	15 bytes	7/7/21, 6:45 PM
34820_90030_match_text_variation__sys_2021-07-...	850 bytes	7/7/21, 6:45 PM
34820_90030_user__sys_2021-07-07T11:45:28.344...	15 bytes	7/7/21, 6:45 PM
34820_90030_user__sys_2021-07-07T11:45:28.344...	2 KB	7/7/21, 6:45 PM
34820_90030_workflow__v_2021-07-07T11:45:28.6-...	15 bytes	7/7/21, 6:45 PM
34820_90030_workflow__v_2021-07-07T11:45:28.6-...	123 bytes	7/7/21, 6:45 PM

One CSV for each entity



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

Scheduled Data Exports

Details

Title*
Scheduled Data Exports

Name*
scheduled_data_exports__v

Job Owner*
System

Schedule*
Daily

Time*
12 : 00 AM (GMT-05:00) Eastern Standard Time ...

Status*
Active

Type*
Scheduled Data Exports

Export Configuration

Entities to Export*

Search columns to add...

Available Entities

- Crosslink Source Event (crosslink_source_event__sys)
- Currency (currency__sys)
- Dataset (dataset__sys)
- Dataset Item (dataset_item__sys)
- Directory (directory__v)
- Distribution (distribution__v)
- Document Type Detail (doc_type_detail__v)
- Document Type Group (doc_type_group__v)
- Document Type Group Detail (doc_type_group_detail__v)
- Document Usage (document_usage__v)
- Document (document__v)

Selected Entities 1 selected

- Documents
- Document Versions
- Multichannel Presentation (multichannel_presentation__v)

Data Storage Option*
Vault File Staging

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

Automate Guest Invites to Azure AD from Vault



- Configuration
 - Admin > Settings > Checkout Settings

The screenshot shows the Veeva Vault Settings page. The left sidebar lists various settings categories under 'VAULT SETTINGS', with 'Checkout Settings' highlighted in orange. The main content area is titled 'Collaborative Authoring with Microsoft Office' and contains two sections: 'Office Application Settings' and 'Office User Settings'. In the 'Office Application Settings' section, there are three input fields: 'Directory (tenant) Id', 'Application (client) Id', and 'Client Secret'. In the 'Office User Settings' section, there are two input fields: 'Collaboration User' and 'Collaboration Drive'. Below these, the 'Auto Invite External Users' checkbox is checked and highlighted with an orange box. A tooltip below this checkbox reads: 'Add external user as guest to you Azure AD so that they can edit in office 365'. At the bottom, the 'Integration Status' is shown as 'Not Authorized' with a yellow warning icon. An 'Authorize' button is highlighted with an orange box.

Navigate to Checkout Settings

Enable flag here

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



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





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

The diagram illustrates the VFM Application folder structure and the VFM Setup.exe installation process. It shows two folders: **VaultFileManager** and **VaultFileManagerFiles**. The **VaultFileManagerFiles** folder is highlighted with an orange box and a callout stating: "Checked-out files are now stored in a different folder than the main application". Below this, a screenshot of the VFM Setup.exe installation window is shown. The window displays user information for "CSM User" and a "Download Installer" button. A callout points to the "Setup (5).exe" file in the file explorer, stating: "Running the VFM Setup.exe on a computer where VFM was already installed the Application folder will be overwritten while the VFM Files folder is not affected".

Folder Name	Type
VaultFileManager	File folder
VaultFileManagerFiles	File folder

CSM User

General Information

Name: CSM User

First Name: CSM

Last Name: User

Email: ben.ober@veeva.com

User Name: csm@usc8.com

Password: Change Password

File Manager: Download Installer

Setup (5).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



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](#)

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



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)

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

Fields will be copied from the source document's metadata

▼ General

Name A Much Brighter Future Sales Aid

Document Number EF-0109

Description

Country [United States](#)

Product [Cholecap](#)

Language

Version 0.1

Status Draft

Type Email Fragment

[Reclassify](#)

Lifecycle Approved Email

Tags

Created By Maria Ruoto on 6/2/2021 4:11 PM CDT

Last Modified By System on 6/2/2021 4:17 PM CDT

CRM Territory

Survey

CRM Org [Verteo BioPharma](#)

CRM Product [Cholecap](#)

CRM Detail Group [Cholesterol](#)

▼ CLM Properties

Disable Actions

CRM Product Group [Cholecap Family](#)

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 screenshot displays the 'CLM Properties' form. It includes fields for 'CLM Content' (radio buttons for Yes/No), 'Disable Actions' (dropdown), 'Custom Reaction' (text area), 'CLM ID' (text field), and a list of items with labels like 'iOS Viewer', 'Start Date', 'End Date', 'Hidden', 'Training', 'Directory', and 'Enable Survey Overlay'. At the bottom, the 'CRM Product' field is highlighted with an orange box and shows a multi-select interface with 'Cholecap' and 'Labrinone' selected, each with a close button (X), and a magnifying glass icon for search.

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

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

The screenshot shows the configuration page for the 'CRM Product' field. The 'Label' is 'CRM Product', 'Status' is 'Active', 'Source' is 'Standard Field', 'Name' is 'crm_product__v', 'Field Type' is 'Object', and 'Object' is 'CRM Product (crm_product__v)'. The 'Searchable Fields' section lists 'Name'. The 'Used in' section lists 'Material > Advisory Board Material', 'Material > Healthcare Practitioner Res', 'Material > Leave Behind', and 'Multichannel Presentation'. The 'Help Content' section says 'For use in the integration with CRM.' The 'Options' section has two checkboxes: 'User must always enter a value (required)' and 'Do not copy this field during Make a Copy'. The 'Display Section' is 'CLM Properties'. The 'Allow user to select multiple values' checkbox is checked. A 'Confirm Modify' dialog box is overlaid, warning that making the field multiple value cannot be undone. An orange callout points to the 'Allow user to select multiple values' checkbox, which is checked. Another orange callout points to the 'Confirm Modify' dialog box.

Label CRM Product

Status Active

Source Standard Field

Name crm_product__v

Field Type Object

Object CRM Product (crm_product__v)

Searchable Fields Name

Used in Material > Advisory Board Material
Material > Healthcare Practitioner Res
Material > Leave Behind
Multichannel Presentation
[Show More](#)

Help Content For use in the integration with CRM.

Options

☐ User must always enter a value (required)

☐ Do not copy this field during Make a Copy

Display Section CLM Properties

☒ Allow user to select multiple values

Confirm Modify

! Making this object field multiple value can not be undone.

Are you sure you wish to continue?

Cancel Continue

Check 'Allow user to select multiple values'

Once you make a field multi select, you cannot revert back single select

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



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

Search: Claim

Use search bar to find an item, and then use the table below to make selection

Filters

Lifecycle State: Approved

Country: United States

Product: Cholecap

Clear Selection

Displaying 1-19 of 19

	Name ▲	Match Text	
<input type="radio"/>	CL-000001	Now approved for the treatment of hypercholesterolaemia in teenagers and young adults with familial hypercholesterolaemia	Clinical
<input type="radio"/>	CL-000003	Reduces risk of mortality by 41% with Cholecap vs placebo	Efficacy
<input type="radio"/>	CL-000006	1.5x more patients remained on Cholecap therapy for 12 months	Efficacy
<input type="radio"/>	CL-000007	CholeCap significantly reduces elevated total cholesterol, LDL-C and apo B level:	

Hovering over the Match Text field value for record CL-000001 displays a hovercard with more of the text value

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

The image shows two overlapping screenshots from the Veeva Vault interface. The background screenshot is the 'Validation Expression' editor, with tabs for 'Fields', 'Functions', and 'Operators'. The 'Fields' tab is active, showing a search bar and a text area containing the expression: `if(IsBlank(@User.affiliate__c),false,true)`. An orange callout bubble points to this text area with the text: 'Admins can define rules on related objects using custom fields'. The foreground screenshot is titled 'User Role Setup Records Details' and shows a form with three fields: 'User*' with value 'CSM User', 'Role*' with value 'Viewer', and 'Country' with value 'United States'. A red error message 'Affiliate on User not populated' is displayed below the 'User*' field. An orange callout bubble points to this error message with the text: 'A validation reason will be displayed when criteria is not met'. A 'Check Syntax' button is visible at the bottom of the background window.

- 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

Create Related Record in Record Create Dialog



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

Create Agenda Item Request [Cancel] [Save + Create] [Save]

Meeting Details

Record Details

Request Id

Document for review* [Field]

Review Meeting [Dropdown]

Meeting Date & Time

Create Review Meeting

Meeting Details

Meeting ID [Field]

Related Campaign [Field]

Meeting Type [Dropdown]

Meeting Date & Time* [Field]

Meeting Duration (minutes) [Field]

Product [Field]

Lifecycle [Field]

Lifecycle State [Field]

Live Meeting Details

Conference Room Location [Field]

Meeting Coordinator [Field]

Coordinator User [Field]

Lifecycle State [Field]

[Cancel] [Save]

RECENT

- MEETING-000001
- MEETING-000016
- MEETING-000011
- MEETING-000015

ALL

- MEETING-000001
- MEETING-000011
- MEETING-000012
- MEETING-000013
- MEETING-000014
- MEETING-000015
- MEETING-000016

+ Create Review Meeting

Selecting the Create record option will open a Create Record popup window



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

Business Admin Logs Users & Groups Configuration Operations Deployment Connections Settings VAULT

DOCUMENT SETUP

Document Types

Document Fields

Field Dependencies

Field Layout

Rendition Types

Searchable Object Fields

Document Tags

Rendition Profiles

OBJECT SETUP

Objects

REPORT SETUP

Report Types

Report Views

USER INTERFACE

Page Links

Pages

Tags

BUSINESS LOGIC

Document Lifecycles

Document Lifecycle Stage Groups

Object Lifecycles

Object Lifecycle Stage Groups

Object State Types

Workflows

Workflows ?

+ Create Document Workflows Search Columns 1-4 of 4

Label	Name	Type	Lifecycle	Status	Description
Content Module Approval Workflow	content_module_approval_workflow__v	Document	Content Module Approval Document	Active	This workflow is used for simple management of Content Module Approval Documents that are created by the System to support ease of authoring and approval of materials.
MDW Review & Approval	review1__c	Document	Material Review & Approval	Active	MDW workflow with single verdict and allow optional roles.
Review	multi_doc_review__c	Document	Any document lifecycle	Active	The multi-document workflow allows to send multi-documents through the same review workflow.
SME and Final Executive Approval	vault_sample_sme_final_executive_approval__c	Document	Any document lifecycle	Active	SME Approval followed by Final Executive Approval. Workflow routes documents for Final Executive Approval only after SME's unanimously approve all documents.

Admin Logs Users & Groups Configuration Operations Deployment Connections Settings VAULT

Document Lifecycles >

General Lifecycle

Details States Event Actions Legacy Workflows Roles Expiration eSignature Pages Overlays

Legacy Workflows ? Create

Label	Name	Description	Status
Approval	approval__vs		Active
Publish	publish__c	For Digital Materials	Active
Review	review__vs		Active
Update Rights Management	update_rights_management__c	For Digital Materials	Active

Rename Start Multi-Document Workflow to Start Document Workflow



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

The screenshot displays the Veeva Vault interface. At the top, there is a navigation bar with tabs: Tasks, Library, Claims, Reporting, Portal, Content Utilization, More, and Modular Content. On the right of the navigation bar are a shopping cart icon with '2' items, a '+ Create' button, and an 'ADMIN' link. Below the navigation bar, the main content area shows a 'Cart (2)' section. It includes a 'Download' button and an 'Empty Cart' button. Two documents are listed in the cart:

- Cholecap A Brighter Future (v0.1)**
PP-CC-GL-04-20-0002 - READY FOR REVIEW
Remove
- Cholecap Stack - Clinical Study (v0.1)**
PP-CC-GL-05-20-0002 - READY FOR REVIEW
Remove

A context menu is open over the cart, showing the following options:

- PERFORM BULK ACTION
 - All 2 Documents
- MANAGE
 - Start Document Workflow** (highlighted)
 - Download Source Files
 - Download Viewable Rendition Files
 - Empty Cart

Action label has been renamed to Start Document Workflow



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

Filter available to list Document or Object Lifecycle Stage Groups

Lifecycles Stage Groups for both Documents and Objects

4 of 4

Group ▲	Lifecycle	Status	Description	Type
Checklist Stages	Checklist Design Lifecycle	Active		Object
Component Asset	Component Asset	Active		Document
eCTD Submission Ready Lifecycle	Submission Ready Lifecycle	Active	This is the binder lifecycle stage groups used for Post Marketing Compliance Package and Pre Clearance Compliance Package	Document
Material	Material Review & Approval	Active		Document



Read & Understood Workflows

- Admins can configure document workflows as Read & Understood workflows

Start Read & Understood Workflow

You are about to send 2 documents on a read & understood workflow. Please select a workflow to continue.

Read & Understood Workflow*

*Required to proceed

Cancel Continue

- 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



Read & Understood Workflows

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

The screenshot shows the 'Create Workflow' form in Veeva. The 'Details' section includes the following fields and callouts:

- Label***: Read and Understood Training Material. Callout: Enter the workflow Label.
- Name***: read_and_understood_training_material. Callout: Select a specific Document Lifecycle.
- Document Lifecycle***: Field Medical. Callout: Select a specific Document Lifecycle.
- Workflow Type***: Document.
- Status**: Editing.
- Description**: (Empty text area).
- ☐ Use workflow for single document.
- Class**: Read & Understood. Callout: Select Read & Understood for Class, then Save.

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

Rules ?	
Rules	
If	then
Send for MLR Review at least one label equals Reje	Revise and Resubmit
Else If	then
Initial In Review Date none within next 30 days	Revise and Resubmit
If none of the conditions above are met	then
	Change State to Approved

For example, documents will automatically be sent back to Revise and Resubmit if the In Review Date is not within the last 30 days

Date & DateTime Fields Support in Workflow Decision Step



- Configuration

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

The screenshot displays the 'Details' and 'Rules' sections of a workflow configuration. In the 'Details' section, the 'Label' is 'Outcome', 'Name' is 'outcome', 'Type' is 'Decision', and 'Description' is empty. The 'Next Steps' are determined by the rules below. In the 'Rules' section, 'Rule 1' is configured with the condition 'If Field Initial In Review Date none within last 30 days' and the action 'then CS Revise and Resubmit'.

Under Rules, select Create Rule for a new rule or Add Condition to add to an existing rule

Enter the desired timeline and select days, weeks, months or years. Choose next step then Save

Select Field, then choose the Date or DateTime field and the operator



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)

The screenshot displays the Veeva Vault interface. On the left, an 'Error' dialog box states: 'The multi-document workflow action has encountered the following errors: This action cannot start against binders: US-CH-2100001'. The main area shows a list of documents under 'All Documents' (1-5 of 5). The first document, 'Rise Above Campaign Toolkit (v0.1)', is highlighted with a red box and labeled 'Document task'. The right sidebar shows the 'INFORMATION' panel for this document, including fields for Name, Description, Document Number, Global ID, Document Link, Global Version ID, Version, Document Version Link, and Status (In Review).

INFORMATION	
Edit Fields	
General	
Name	Rise Above Campaign Toolkit
Description	
Document Number	VV-00173
Global ID	22435_359
Document Link	
Global Version ID	22435_359_384
Version	0.1
Document Version Link	
Status	In Review

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

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

The screenshot shows a web form titled "Start Options" with a help icon. Below the title is a section labeled "Control 1" containing a dropdown menu set to "Instructions". Underneath is a text area labeled "Instructions*" containing the text: "You are about to start review for multiple documents. Please complete the following fields to begin this workflow." An orange callout bubble points to the text area with the text: "Once you reach 500 characters you will not be able to add additional text".

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

The screenshot displays the Veeva document review interface. A 'Document task' popup is centered, prompting the user to assess comments and annotations. The popup includes a 'Verdict' section with two options: 'No changes required, ready for approval' (selected) and 'Changes required, return to owner'. Below this is a 'One Off Use' section with 'Yes' and 'No' radio buttons. The background shows a document titled '21R2 Feature Demo - Prompt for Fields 6/3/2021 #1 (v0.1)' in the 'In Review and Approval' state. The right sidebar contains document information, including Name, Document Number, Description, Country, Product, Language, Version, Status, Type, Subtype, and Lifecycle.

When a workflow has multiple documents and the prompted field has an existing value, it will appear in the verdict popup for each document

Fields are saved in the document for multi-verdict workflows only when the task is completed (not when the verdict is provided)

Prompted fields can be marked as required

Prompt for Document Fields in Document Workflow Verdicts



- Configuration

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

Assess Outcome

Prompts ?

☐ Prompt for Document Fields: One field value that applies to all documents

☒ Prompt for Verdicts: One verdict for each document

Verdicts

Verdict Label* No changes required, ready for a

☐ Short-circuit tasks with the configured tags.

+ Add Comments

+ Add Capacities

+ Add eSignature

+ Add Reasons

+ Add Field Prompts

Navigate to the Verdict and select Add Field Prompts

Prompt for Fields

Product

☒ Required

+ Add field

Select the field to be prompted and check the box if it is required, then Save

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

Start Multi-document Workflow

Approver* Assigned to every user

Tyler Binion tyler.binion@vv-csm.com

Cholecap-Approver

Ben Ober ben.ober@vv-csm.com

QA Group

Owner User 1 demo.user1@vv-csm.com

Workflow initiators will be able to select users from the Allowed Group setting and/or users available from DAC

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

Add Participants* ☒ Allow workflow initiator to select participants

Role allowed to participate: Approver

☐ Allow task instructions for these participants

☐ Default users from sharing settings

☒ Enable allowed group in Dynamic Access Control role

☐ Use role as participants

Add Control

When enabled, Vault also shows users in the allowed group of a dynamic access control (DAC) role in addition to the users in the sharing settings, to the workflow initiator. No changes in the list of users for non-DAC role.

Choose an Allowed Group on the Document Lifecycle Role

Options

☒ Enable Dynamic Access Control ?

Allowed Group QA Group

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

Rule 1

☐ Always ☒ Perform with conditions

If Field Number of Approval Cycles is greater than

[+ Add condition](#)

perform actions

Update document field

Fields*

Approved for Distribution Date

is greater than
equals
is not equal to
is greater than or equal to
is less than or equal to
is less than
is blank
is not blank

New >, <, >= and <= operators added

Label* Content Action

Name* Edit Formula of Approved Date

Type* Fields | Functions | Operators

Description

Search Functions

And(boolean1, boolean2, ...)
Case(expression, value1, result1, value2, result2, ..., else_result)
If(boolean, value_true, value_false)
IsBlank(any)
IsNumber(text)
Not(boolean)
Or(boolean1, boolean2, ...)
DATE
Date(year, month, day)

Next Steps

ays ☐ Perform with con
perform actions

IF and Case functions added

Restrict Workflow Owner from Receiving a Task



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

Reviewers* Assigned to every user

Country

- 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

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

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'

Workflows > MDW Review & Approval

Details

Label* MDW Review & Approval

Name* review1 —c

Document Lifecycle Material Review & Approval

Workflow Type* Document

Status Active

Description MDW workflow with single verdict and allow optional roles.

☐ Use workflow for single document

When enabled the workflow will be limited to a single document

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

Auto-Removal of Documents from Workflows



- Configuration

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

Decision: State Change Cancel ✓ Save

Rules ?

Rule 1 ✕

☐ Always ☒ Perform with conditions

If

Task ▼ Approve ✕ Legal Approval ✕ at least one label equals Not Approved ▼ ✕

Medical Approval ✕

Regulatory Approval ✕

+ Add condition

perform actions

Change state of documents ▼ ✕

Lifecycle State*

Revise and Resubmit ▼

Automatically remove matching documents ▼

☐ Removed Documents are moved to Workflow Cancel State

+ Add Action

Details

Rules

When configured documents will automatically be removed when conditions are met

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

Start Next Workflow

All tasks for the workflow "Approver Workflow" have now been completed. Please choose one of the following options:

Start a workflow

Take no further action OK

The workflow start dialog will automatically display after the end step

- 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

Display Next Workflow Start Dialog When Current Workflow Ends



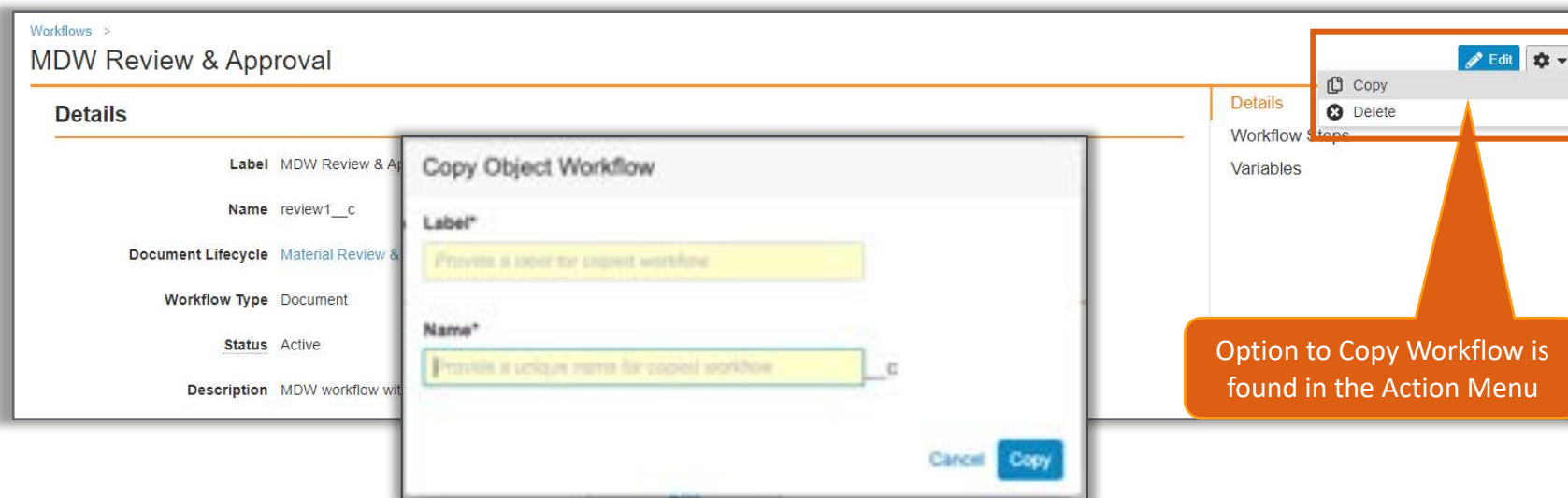
- Admin > Configuration > Workflows > [Select Workflow] > End

The screenshot shows the Veeva Vault configuration interface. The top navigation bar includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration' (highlighted), 'Operations', 'Deployment', 'Connections', and 'Settings'. The right side of the bar has a 'VAULT' link with a right arrow. The left sidebar contains a tree view with 'DOCUMENT SETUP' (Document Types, Document Fields, Field Dependencies, Field Layout, Rendition Types, Searchable Object Fields, Document Tags, Rendition Profiles), 'OBJECT SETUP' (Objects), and 'REPORT SETUP'. The main content area shows the breadcrumb 'Workflows > Material Approval MDW >' and the title 'End'. Below the title are 'Edit' and 'Settings' buttons. The 'Details' section shows 'Label: End', 'Name: end__c', 'Type: End Workflow', and a 'Description' field. The 'End Options' section has an 'End Type' label with two radio buttons: 'End workflow' (unselected) and 'Display start next workflow dialog when workflow ends' (selected). This second option is highlighted with an orange box. A callout bubble points to this box with the text 'Option to display Start Next Workflow Dialog when workflow ends'.



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



Option to Copy Workflow is found in the Action Menu

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

Start Document Workflow

You are about to start Review for this document. Please complete the following fields, then click start to begin this workflow.

Reviewers* Assigned to every user

Country

Product*

Review Due Date*

mm/dd/yyyy

*Required to proceed

Cancel Start

Control 2 Prompt for Document Fields

Fields	Required
Product	<input checked="" type="checkbox"/>

+ Add field



Resources

Resources

- Contact your Customer Success Manager 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/>



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





Thank you



Appendix

Enforce Use of HTTPS When Configuring SAML & OAuth 2.0 Profiles

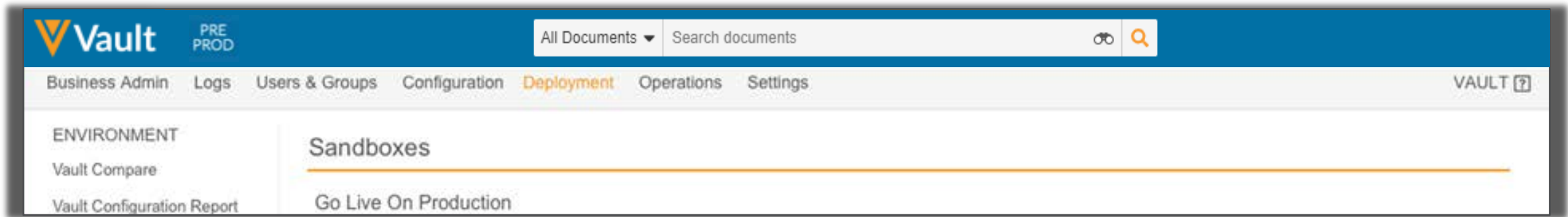


- Admins are enforced to use HTTPS (hypertext transfer protocol secure) instead of HTTP when creating SAML profiles and OAuth 2.0 profiles
- Considerations
 - This change only applies when creating new profiles or updating existing ones
- Configuration
 - **SAML:** Admin > Settings > SAML Profiles
 - 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



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





Localize Vault to Swedish

- [illegible]



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 will be deprecated entirely
 - Any edits on documents not checked in before 21R3 will be lost

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

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

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

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

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

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

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





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

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

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

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

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



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

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