

# 21R3 Commercial & Medical Content Release Education

December 2021





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# Self Serve Recording Navigation

- Use the panel on the left to navigate between features and demonstrations
- Both sections and features are labeled for your convenience

The screenshot shows a video player interface. On the left is a dark sidebar with the Veeva logo at the top. Below the logo, the text reads '21R3 Commercial and Medical Vault Release Education' and '1h 17m 45s'. A user profile for 'Lauren Subik' (LS) is shown. Under the 'CONTENT' heading, there are two sections: 'Introduction' and 'Announcements'. The 'Introduction' section contains a list of items: '01. 21R3 Commercial & Med...' (00:21), '02. Introductions' (00:15), '03. Self Serve Recording Na...' (00:05), and '04. 21R3 Key Dates' (00:54). The 'Announcements' section contains '05. Announcements' (00:04) and '06. Internet Explorer' (00:31). The main video area has an orange background with the text '21R3 Commercial & Medical Vault Release Education' and 'December 2021', and the Veeva logo at the bottom. The video player controls at the bottom show '00:03 / 00:21' and '1 / 134'.

# 21R3 Key Dates

Dates	Event
November 1	(all PODs) Pre-release vaults available
November 1-5	Validation package available on VeevaDocs <b>November 1:</b> System Release Memo <b>November 2:</b> Compliance Documents <b>November 5:</b> Executed OQs
November 16	<b>Option 1 - Commercial and Medical Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/7316336229687/WN_5JGKSmnJRGcVSTpRIhVK0Q">https://veeva.zoom.us/webinar/register/7316336229687/WN_5JGKSmnJRGcVSTpRIhVK0Q</a>
November 23	<b>Option 2 – Commercial and Medical Q&amp;A Session</b> <a href="https://veeva.zoom.us/webinar/register/WN_lgIaSx3-QEyhAH7KBTCOSg">https://veeva.zoom.us/webinar/register/WN_lgIaSx3-QEyhAH7KBTCOSg</a>
November 18	<b>Developer Release</b> <a href="https://veeva.zoom.us/webinar/register/WN_y9N5TTUuR-OWIbSgHzlVhw">https://veeva.zoom.us/webinar/register/WN_y9N5TTUuR-OWIbSgHzlVhw</a>
November 19	Release to all limited release PODs and PODs VV1-12, VV1-1069, 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>
December 3	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](#)



# OneWorkflow 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 OneWorkflow*




# 21R3: Office Online Support



21R2 Office Online  
Support stops



Collaborative Authoring  
replaces Office Online

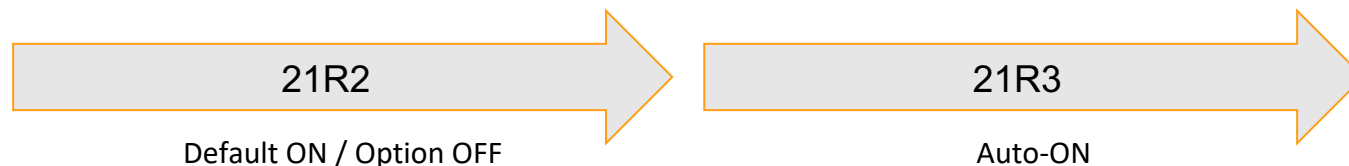


Users can check back in  
until 21R3



# 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 **Auto-on** immediately with the 21R3 upgrade
- For more information about Action UI, visit the [Action UI Hub](#)



— Veeva COMMERCIAL & MEDICAL —

# SUMMIT CONNECT

EUROPE

18 November 2021

One day dedicated to learning, strategizing,  
and networking with peers and industry experts.

1  
day

60  
sessions

2,000+  
life sciences  
attendees



Register Now

[veeva.com/eu/summit](https://veeva.com/eu/summit)

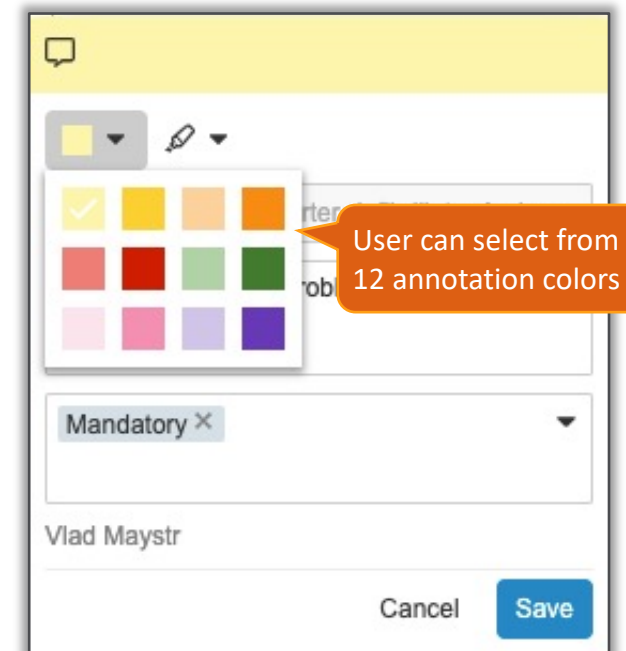
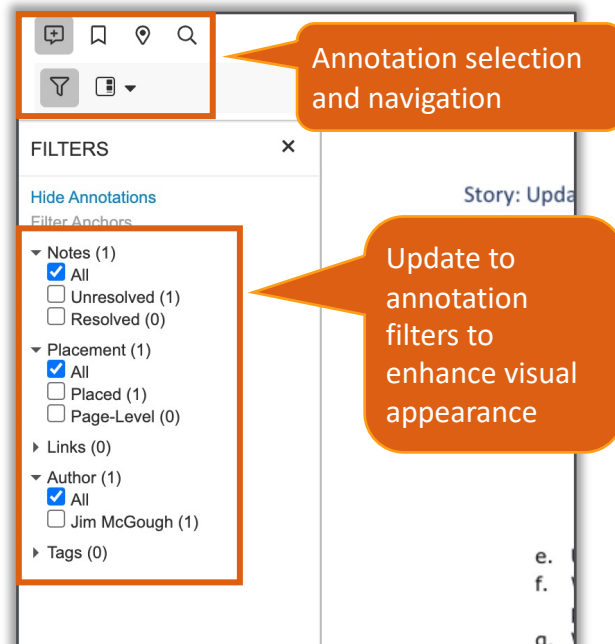


Documents



# Annotate Usability Refresh

- Action UI has received additional enhancements to improve document viewing, navigation and annotations
  - Updated areas include:
    - External viewers
    - Bookmarks
    - Annotations
- Learn more about [Annotating Documents](#)



# Delete Document Relationships on Older Versions



- Relationships on older versions of a document can now be deleted if the relationship is version-specific
- Considerations
  - The *Edit Relationship* permission is required on the document version that the relationship is bound to
  - This feature is only applicable to version-specific document relationships. This is enabled by contacting Support
  - Learn more about [Version-Specific Document Relationships](#)

The screenshot displays the Veeva document management interface. At the top, there is a navigation bar with tabs for Tasks, Library, Claims, Content Modules, Reports, Dashboards, Admin Tools, and Portal. A 'Create' button and a settings icon are also present. Below the navigation bar, the document title 'CarDeo Brochure (v0.2)' is shown, along with a 'Revise and Resubmit' button. A status bar indicates 'Latest viewable version is 0.3'. The main content area shows a document viewer with a 'Pre-Approval' status and a progress bar with stages: In Review and Approval, Proofing and Compliance, Submission to Health Authority, and Approved for Distribution. The document viewer shows a 3D model of a brain. On the right side, there is a 'RELATIONSHIPS' panel. Under 'Components (1)', there is a relationship to 'CarDeo\_Logo\_White ASSET-21000186 (v1.0)' with the status 'Approved for Use'. A 'Remove' button is visible next to this relationship. A callout box points to this button.

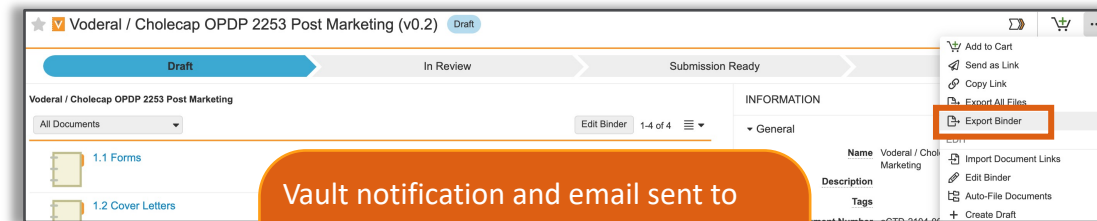
New ability to 'Remove' document relationship created on older version of document



# Export Binder Notifications: Show Failed Document Exports

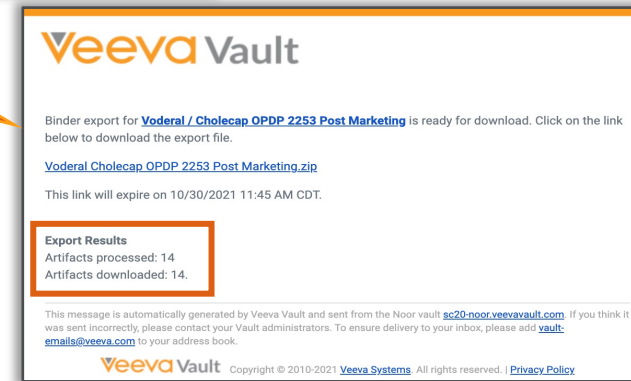
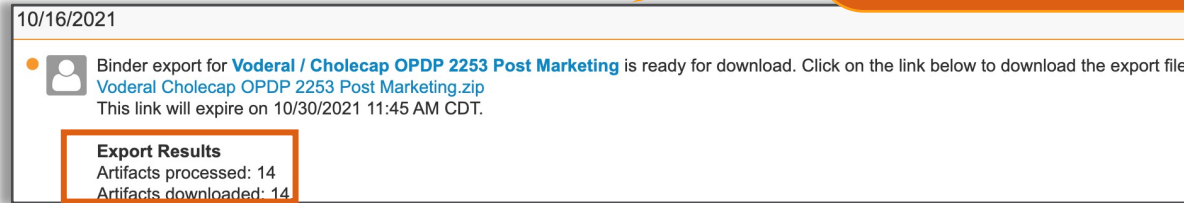


- The *Export Binders* action notification now includes a new 'Export Results' section, indicating the total number of items that were processed, downloaded, or failed



Vault notification and email sent to user when Binder Export is complete:

- If content from binder fails to process and download, the count of those failures will also be displayed



## Considerations

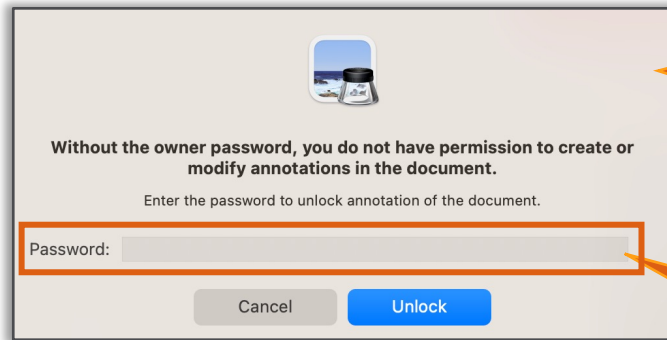
- The document names of the failed items are not included in the notification. User must examine the exported zip file for missing items
- Learn more about [Exporting Binders](#)





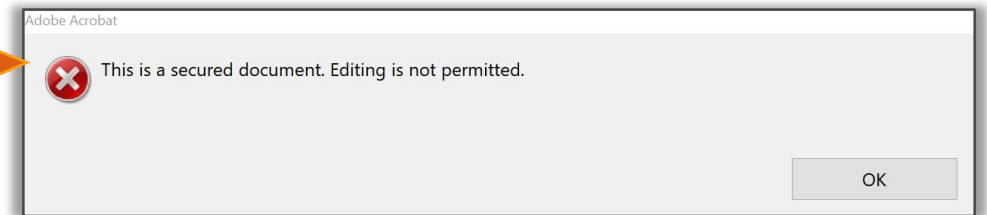
# Protected PDF Renditions

- Admins can enable the Protected PDF Renditions feature to render the viewable PDF rendition with password protection
  - When downloading a PDF Rendition from Vault, a randomly-generated password is applied which limits users from altering the document, prevents printing and copying of content



Depending on your computer's operating system and PDF viewer the Protected PDF notification message will differ

Password used to protect PDF is randomly assigned by Vault and is not recoverable



- Considerations

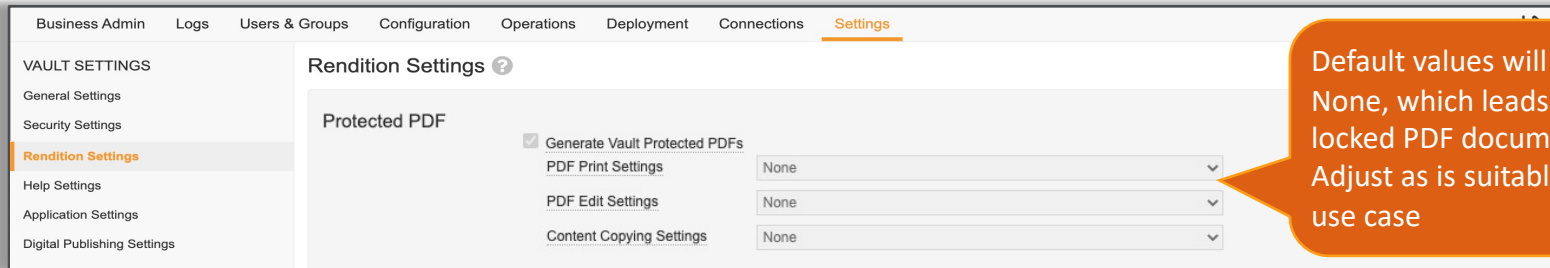
- Passwords are randomly generated and not stored in Vault—they are non-recoverable
- Cross-linked documents will not have security applied to them
- PDF/A documents cannot be edited--security will not be applied to them
- Source PDF documents that are already protected with security will not have Vault PDF protection applied, but will still be downloadable
- Learn more about [Protected PDF Renditions](#)



# Protected PDF Renditions

- Configuration

- Settings > Rendition Settings > [Edit] > Protected PDF > Enable Generate Vault Protected PDFs



Default values will be None, which leads to a fully locked PDF document. Adjust as is suitable for your use case

## PDF Print Settings options

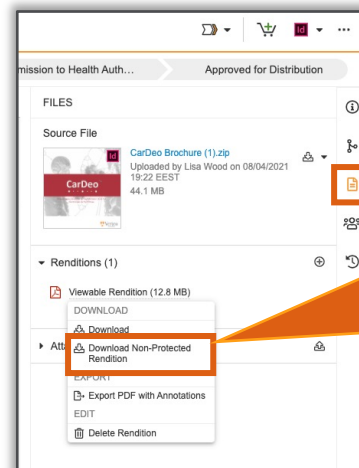
- ✓ None
- Lo Resolution (150 dpi)
- High Resolution

## PDF Edit Settings options

- ✓ None
- Inserting, deleting, and rotating pages
- Filling in form fields and signing existing signature fields
- Commenting, filling in form fields, and signing existing signature fields

## Content Copying Settings options

- ✓ None
- Copying of text, images, and other content
- Content copying for accessibility devices only



Vault System Admin and Vault Owners will maintain the ability to download a non-protected Viewable PDF rendition from the document's Files View







# Overlay Override Page Size Tolerance

- When downloading the PDF's viewable rendition, the closest available overlay override up to 0.5'' difference in height or width will be applied
  - When a match is not found, the default Basic Overlay template will be used

The screenshot shows the 'Business Admin' interface with the 'Obsolete' overlay template selected. The 'Details' section includes fields for Name, Header, Diagonal Watermark, and Footer. The 'Overlay Override Options' section has a checked checkbox for 'Match page to nearest Overlay Override paper size'. Below this is a table of 'Overlay Overrides'.

Name	Paper Size	Orientation	Modified Date
JamieTestTemplate_MyriadPro.pdf	Letter (215.9 mm x 279.4 mm)	Portrait	12 Apr 2021 3:04 PM EDT





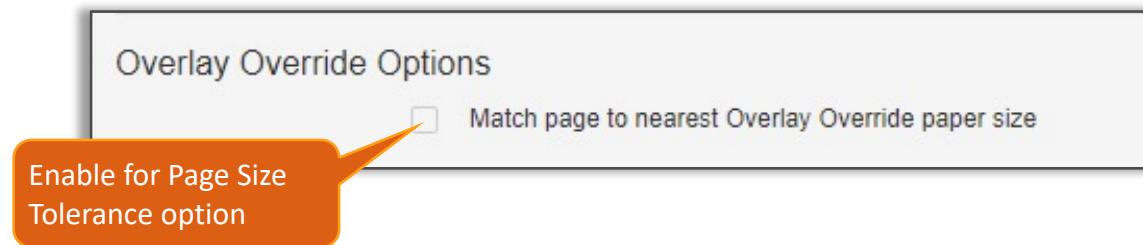
# Overlay Override Page Size Tolerance

- Considerations

- If the size difference falls between two overlays, the overlay for the smaller page will be used
- This is not page scaling - if the size is too far off then the overlay may be cut off
- Learn more about [Overlay Overrides](#)

- Configuration

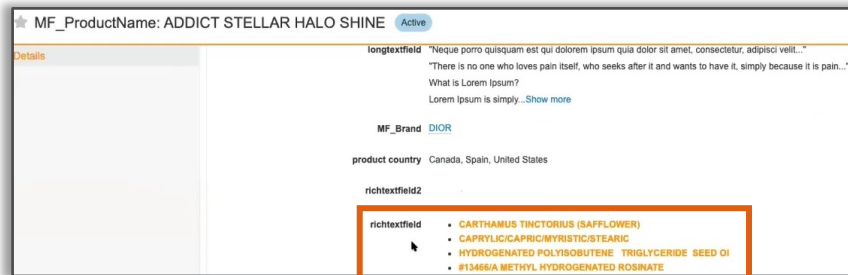
- Business Admin > Component > Overlays > [Overlay Template] > Edit



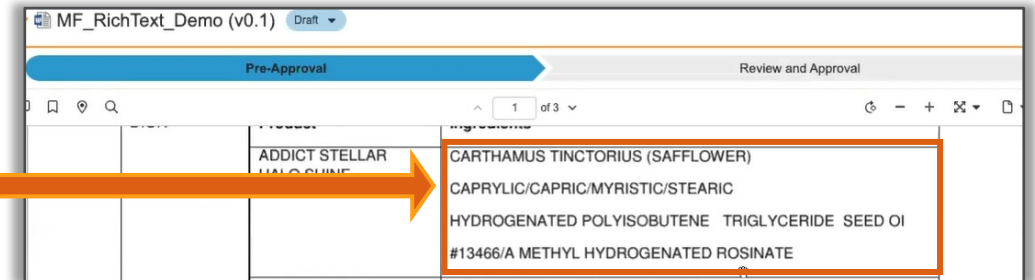


# Rich Text for Merge Fields

- Microsoft Word Merge Fields can now display the Rich Text field values with the text formatting defined in an object rich text field
  - Using *;richtext* at the end of a Rich Text Type token syntax will display the rich text formatting defined in Vault, Ex. `#{vault:relationshipname__vr.rich_text_fieldname__v;richtext}`

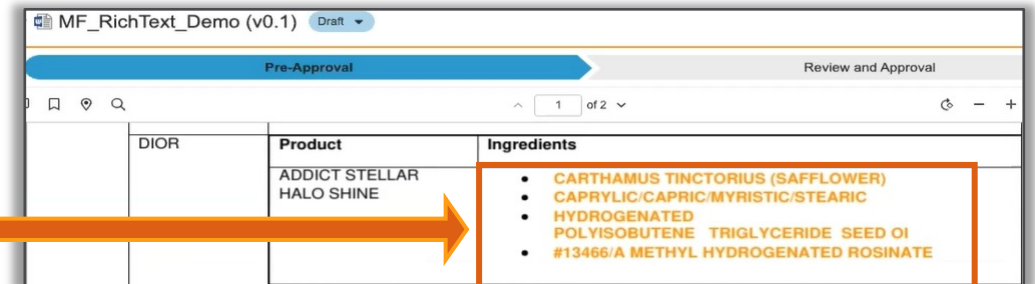


Brand	Product	Ingredients
<code>#{vault:document__mf_brand__cr.name__v}</code>	<code>#{vault:document__mf_brand__cr.mf_productnames__cr.name__v}</code>	<code>#{vault:document__mf_brand__cr.mf_productnames__cr.richtextfield__c}</code>



Adding *;richtext* to the end of a Rich Text Type token will display the rich text formatting defined in Vault

Brand	Product	Ingredients
<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.richtextfield__c;richtext}</code>



# Rich Text for Merge Fields



- Considerations
  - Does not support Blockquotes
  - Does not work in combination with Vault barcodes feature
  - Learn more about [Using Merge Fields for Microsoft Word](#)



# Merge Fields Multi Column Table Sort

- Multi Column Table Sorting in Word documents will allow users to sort data merged into tables based on multiple columns instead of one
  - A Merge Field token used within a table will be able to sort by multiple table columns when using a VQL *ORDER BY* clause for up to 3 field values which appear in the table

The ORDER BY clause is sorting the table by Country, then Province / State, and finally by City

<pre>\$(vault:document_city_cr.province_cr.c ountry_cr.name__v;WHERE country_cr.name__v='Canada' OR country_cr.name__v='United States' ORDER BY country_cr.name__v ASC, province_cr.name__v DESC, city_cr.name__v}</pre>	<pre>\$(vault:document_city_cr.pro vince_cr.name__v}</pre>	<pre>\$(vault:document_city _cr.name__v}</pre>
--	--	--

Canada	Québec	Montreal
Canada	Ontario	Ottawa
Canada	Ontario	Toronto
Canada	Nova Scotia	Halifax
United States	New York	New York
United States	California	Los Angeles
United States	California	Pleasanton
United States	California	San Diego

- Considerations
  - Learn more about [Filtering & Sorting with Merge Fields](#) and [Filtering & Sorting with Tables](#)

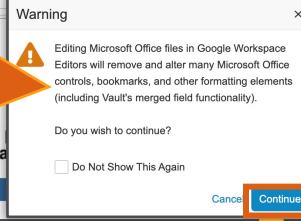




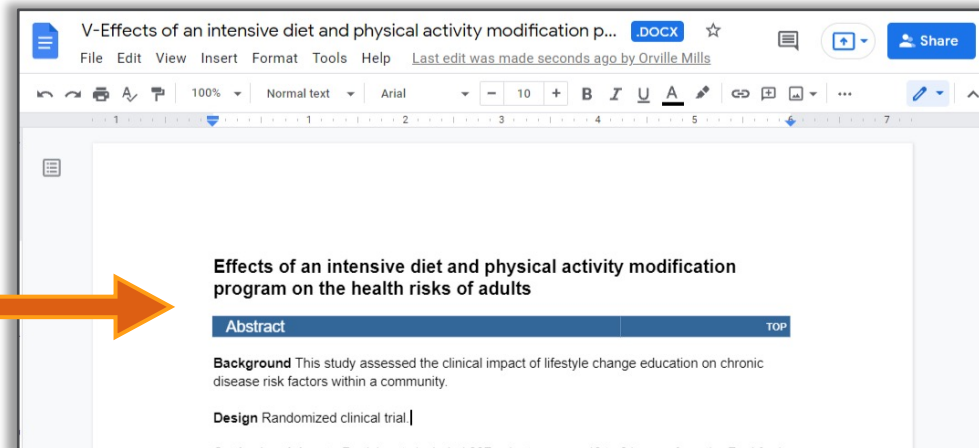
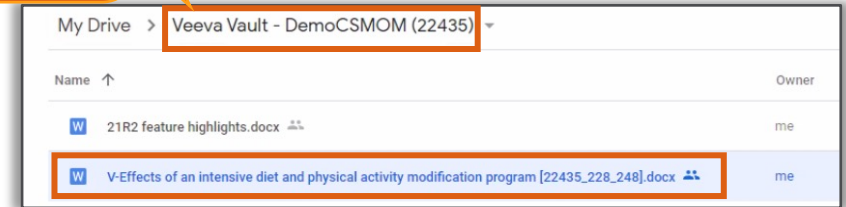
# Google Drive Integration

- Vault can now be configured to allow users to check out, edit, and check in documents with Google Drive and Workspace
  - This feature supports .docx, .xlsx, and .pptx file formats when editing in Google Workspace Editor

Vault warning: editing Microsoft Office files with Google Workspace may result in the removal of certain features



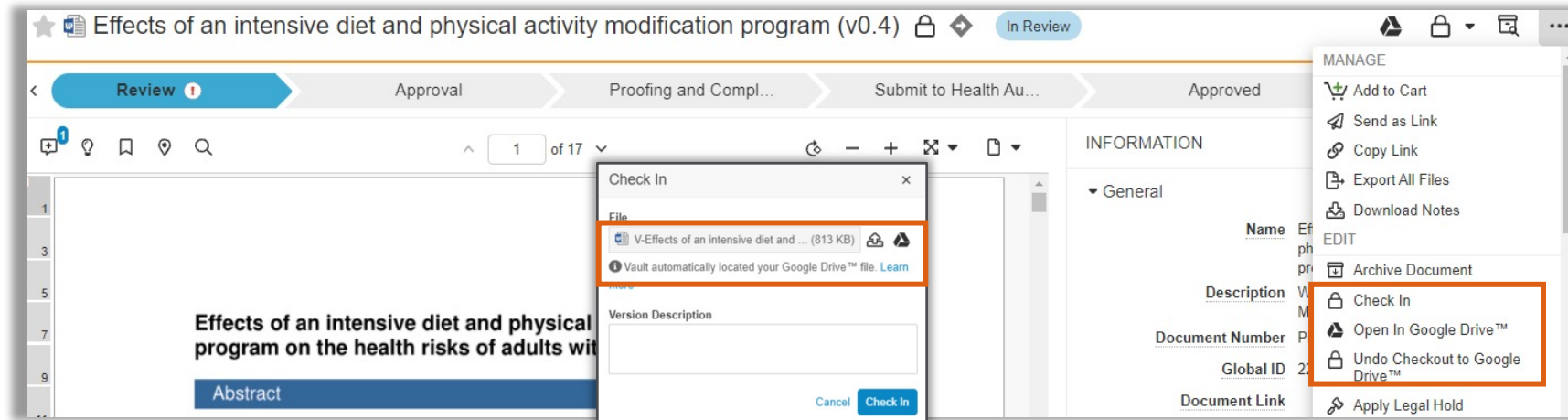
Upon check out to Google Drive, Vault creates a folder in the user's Google Drive for the specific Vault





# Google Drive Integration

- When checking the document back in, Vault automatically pre-selects the checked-out file from Google Drive
  - Users may choose to select a different file to check in either from their Google Drive or their computer



- Considerations

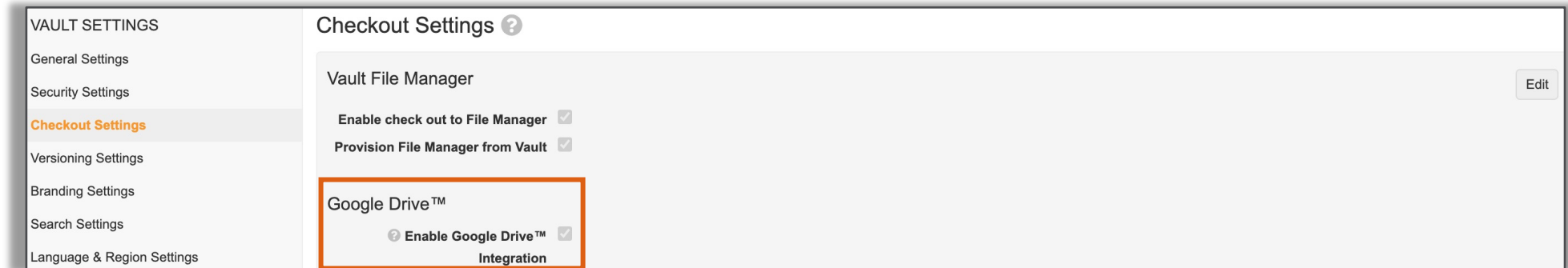
- Google functionality does not support:
  - Vault features such as Merge Fields, Bookmarking, Rendering, Dynamic Linking and Report Excel templates
  - Microsoft Office features such as macros and track changes
- Security on the document in Google Drive is governed by organizations' Google Drive configuration and does not reflect the settings in Vault
- Google will create a new file each time the same document is checked out from Vault
- Learn more about the [Google Drive Integration](#)





# Google Drive Integration

- Configuration
  - Admin > Settings > Checkout Settings > Edit > Enable 'Google Drive Integration'







Objects

# Online Modifications to High Volume Objects

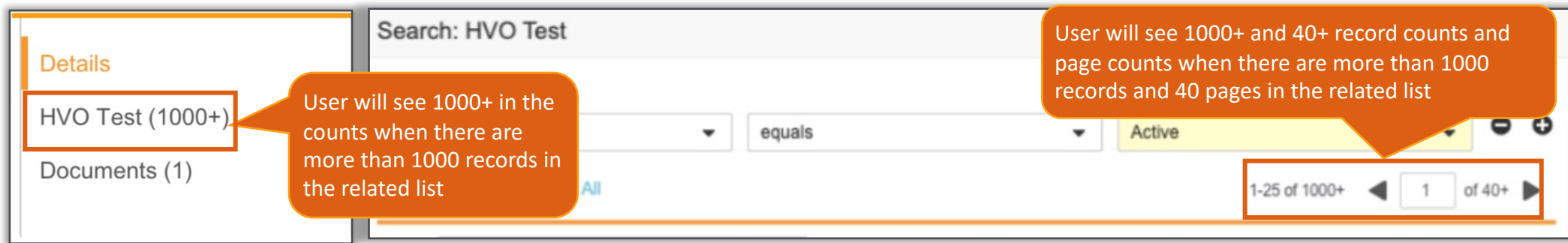


- High Volume Objects (HVO) with over 10,000 records are now able to have metadata changes online without having to lock end-users out of the system
  - While the changes are in progress the object will display an *In Deployment* status on the object configuration page
- Considerations
  - Configuration Mode is no longer required during HVO modifications
  - Metadata changes are process asynchronously
  - Learn more about [Configuring High Volume Objects](#)

# High Volume Object Search Results Capped at 1,000 Records



- High Volume Object (HVO) records returned in Related Object sections and advanced search dialogs will be limited to 1,000 records
  - This enhancement will improve performance and user experience while paginating through HVO records



- Considerations

- Use the Show in Tab feature and the corresponding filter support to help narrow down the list of returned records
- Learn more about [Configuring High Volume Objects](#)



# Document Reference Field Constraints

- Vault can now constrain document reference fields on objects based on types, subtypes, and classifications or based on values of other document fields
  - This feature can help organizations align document reference fields to specific business processes by narrowing the documents available for selection tailored to the Object's purpose

Claim: CL-00001 Approved

Claim Withdrawn - No Longer Approved Pending Review

Details

Match Text Variations (0)

Core Supporting Documents

References (4)

Where Used

Reviewer Comments

Claim Documents (1)

Workflow Timeline

Integration Details

System Information

Details

Match Text Variations

Core Supporting Documents

ISI Document

Package Insert Document

Claim Document

Select Document

Fields

All Documents

Filters

Document Name 1-20 of 20

<input type="radio"/>	16R1 Controlled Doc Template (v0.3) CD-00007 Cholecap   Claims Document	Draft
<input type="radio"/>	21% to 42% Reduction in Tri-G (v1.0) C-CC-0001 Cholecap   Claims Document	Approved for Use
<input type="radio"/>	22% Reduction in Major Vascular Events (v1.0) C-CC-0002 Cholecap   Claims Document	Approved for Use
<input type="radio"/>	29% to 49% Reduction in Total Cholesterol (v1.0) C-CC-0003 Cholecap   Claims Document	Approved for Use
<input type="radio"/>	37.2% Reduction in LDL-C (v1.0) C-CC-0004 Cholecap   Claims Document	Approved for Use
<input type="radio"/>	37.2% Reduction in LDL-C - delete doc (v0.1) CD-00011 Cholecap   Claims Document	Draft

In this example, the Claim Document field has a VQL expression constraint for Type = Claims Document



# Document Reference Field Constraints

- Considerations
  - Does not support constraining at the object-type level
- Configuration
  - Admin > Configuration > Objects > [Object] > Fields > Create or Edit field

Objects > Claim > Fields > Claim Document

Details

Label\* Claim Document

Status Active

Source Custom

Name\* claim\_document

Data Type Object (Documents)

Unbound Document Field Claim Document (unbound) (claim\_document\_unbound\_\_c)

Help Content

Options

User must always enter a value (required)

Values must be unique

Display in default lists and hovercards

Do not copy this field in Copy Record

Secure relationship

Document Version Latest version

Reference

Outbound Relationship Name\* claim\_document

Inbound Relationship Label\* Claims

Inbound Relationship Name\* claims

Deletion Rules Set field to blank when related document is deleted

Constrain Referenced Document

Criteria VQL type\_\_v = 'Claims Document'

Validate Preview

Write VQL expression to constrain the document reference field by Type, Subtype, Classifications, or Object fields

Criteria VQL

Criteria VQL: type\_\_v = 'Claims Document'

1-20 of 20

Name	Document Number	Type	Subtype	Classification
18R1 Controlled Doc Template	CD-00007	Claims Document		
21% to 42% Reduction in Tri-G	C-CC-0001	Claims Document		
22% Reduction in Major Vascular Events	C-CC-0002	Claims Document		
29% to 49% Reduction in Total Cholesterol	C-CC-0003	Claims Document		
37.2% Reduction in LDL-C	C-CC-0004	Claims Document		
37.2% Reduction in LDL-C - delete doc	CD-00011	Claims Document		
39% to 60% Reduction in LDL	C-CC-0005	Claims Document		
74% Cholecap Patients achieved NICE LD...	C-CC-0006	Claims Document		
Cholecap is the safest statin	C-CC-0011	Claims Document		
Cholecap Proven Effective with Three Pai...	CD-00008	Claims Document		

Close

Admin can preview the VQL expression





# Searching & Filtering



# Search Modifiers on Object Tabs

- When searching on any object tab, Vault now suggests a list of search modifiers (picklists, object references, and yes/no fields ) that are applicable to the object

The image shows three sequential screenshots of a search interface for 'Products'.  
1. The first screenshot shows a search box with 'produ' entered. A dropdown menu titled 'MODIFIER' is open, listing 'Product Name', 'Product Abbreviation', and 'Product Family'. An orange callout bubble points to this list, stating: 'Search Modifier for 'Product' fields appears when searching for the word Product on a Product Object tab'.  
2. The second screenshot shows the search box with 'Product Name:' selected and highlighted in yellow. An orange callout bubble points to this text, stating: 'Upon selecting a suggested field, the field name is displayed in the search box with yellow highlighting'.  
3. The third screenshot shows the search box with 'Product Name: cholecap' entered and highlighted in green. An orange callout bubble points to this text, stating: 'Once a valid value is added the entire modifier, including the field and value, is highlighted green'.

- Considerations

- Up to five fields are suggested
- If no fields match the string in the search box, the modifier section is not displayed
- Only fields visible to the user through permissions will be suggested
- Learn more about [Search Modifiers on Objects](#)





# Substring Matching for Contains Operator

- The 'Contains' operator, available when filtering search results on a picklist or object reference field, now matches any part of a word or number
- Learn more about the ['Contains' Operator](#)

The screenshot shows the Veeva CRM interface with a filter applied to the 'Country' field. The filter is 'Country contains United'. The table below shows the results of this filter:

Name	Status	Country
Zoom Remote Meeting Invite Template (v1.0)	Approved	United States
Your Choice (v1.0)	Approved	United States
Woman sleeping (v1.0)	Approved for Use	United States
Well Tolerated (v1.0)	Approved	United States
Welcome Doctor (v1.0)	Approved	United States
Webinar Cloud Recording (v0.2)	Draft	United Kingdom

'Contains' Operator used to filter by countries including 'United'

Filters all results with 'United' included in Country name





# Add Language Options to Language Field



- The Language field on documents in multilingual Vaults now includes an additional 242 languages
- Considerations
  - Users must make a manual selection for languages available in Language field
  - About [Supported Languages](#)
  - Learn more about [multi-language support](#)

The screenshot shows a document information pane with the following fields and values:

<b>Name*</b>	Cholecap PPT Presentation Animation
<b>Title</b>	
<b>Type</b>	Zulu
<b>Subtype</b>	Javanese
<b>Classification</b>	Haitian
<b>Document Number</b>	Kashmiri
<b>Batch Number</b>	Oriya
<b>Affiliate</b>	Farsi
<b>Country*</b>	Armenian
<b>Export File Name</b>	Assamese
<b>Language*</b>	Azerbaijani
	Nepali
	Sinhalese
	Kazakh
	Quechua
	Welsh
	English

An orange callout box points to the list of languages, stating: "List of available languages to select from in Doc Info pane".

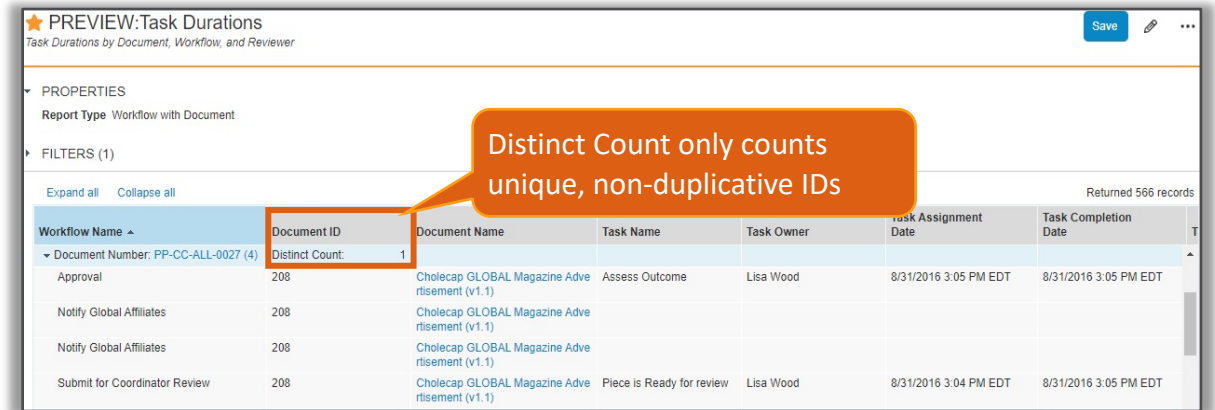
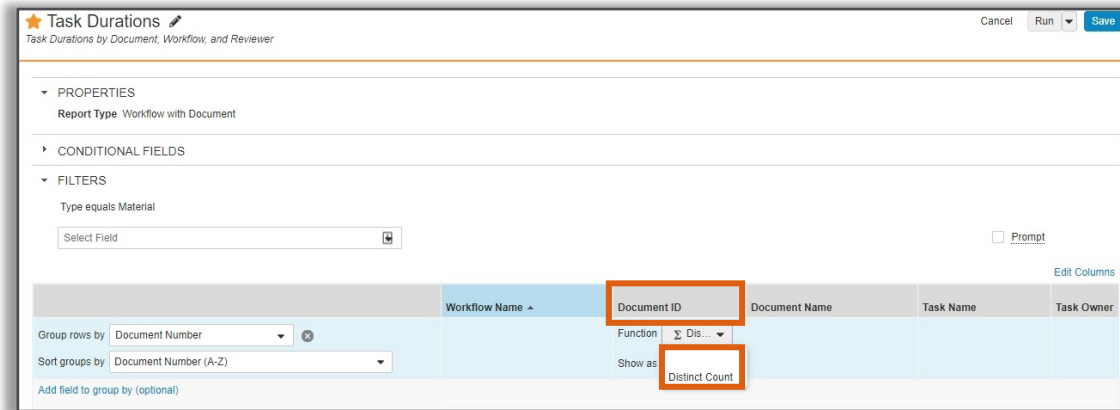


# Reporting



# Distinct Count in Reports

- Report ID fields have been enhanced to include a Distinct Count function that provides the total count of unique records in a grouped report



- This feature is useful when working with multi-pass reports that join multiple objects and views which result in duplicate objects being displayed and counted more than once
- Considerations
  - Multi-pass and standard report types are supported
  - This feature is not available on ladder reports
  - Learn more about [Distinct Count](#)





# Remove Links in Report Exports

- There is a new Advanced Option in the report builder that will remove the links from reports that are exported to CSV, Excel, and PDF
  - This feature can be useful when sharing exported reports with non-Vault users as the links can cause confusion

**ADVANCED OPTIONS**

Excel Template ?

Sample

Upload

**Export Options**

Fit PDF export columns to one page

Remove links

★ 19R3 Documents with Standard Metrics

MANAGE

Schedule Flash Report

PROPERTIES

Report Type Document

FILTERS (1)

Expand all Collapse all

Document Name	Document Number	Document Status	Created By	Type	Subtype
Global Content Type: Component (160)					
Global Content Type: Corporate Communication (3)					
PP-CC/US/2019/0011 United States 19R3 - Add Participants to Unselected Optional Tasks Demo (v0.1)	PP-CC/US/2019/0011	Ready for Review	CSM User	Material	Promotional
Raxxipen FDA Clearance Press	RX-US-170001	In Review	Lisa Wood	Med Device Material	Corporate

Export Options:

- Export to CSV
- Export to Excel
- Export to PDF

– Exported reports will have the following behavior:

• CSV exports will have the URL columns removed

T	U	V	W	X	Y	Z	AA
Steady State	URL	URL-Content Creation Cost	URL-Content Creation Currency				
#####	#####	https://usc8-democsmom.veeva.com/	https://usc8-democsmom.veevavault.com/	https://usc8-democsmom.veevavault.com/			
#####	#####	https://usc8-democsmom.veeva.com/	https://usc8-democsmom.veevavault.com/	https://usc8-democsmom.veevavault.com/			
#####	#####	https://usc8-democsmom.veeva.com/	https://usc8-democsmom.veevavault.com/	https://usc8-democsmom.veevavault.com/			
#####	#####	https://usc8-democsmom.veeva.com/	https://usc8-democsmom.veevavault.com/	https://usc8-democsmom.veevavault.com/			
#####	#####	https://usc8-democsmom.veeva.com/	https://usc8-democsmom.veevavault.com/	https://usc8-democsmom.veevavault.com/			

• Excel exports will have the links replaced with text values

Document Name	Document Number	Document Status	Created By	Type
0000 R1 Raxxipen eDetail CLM (v1.0)	asset-00124	Approved for Use	PromoMats User	Component Asset
0000 R1 Raxxipen eDetail CLM (v1.0)	asset-00127	Approved for Use	PromoMats User	Component Asset
0001 R1 Raxxipen eDetail CLM (v1.0)	asset-00128	Approved for Use	PromoMats User	Component Asset
0002 R1 Raxxipen eDetail CLM (v1.0)	asset-00123	Approved for Use	PromoMats User	Component Asset
0002 R1 Raxxipen eDetail CLM (v1.0)	asset-00129	Approved for Use	PromoMats User	Component Asset

• PDF exports will have the blue text in replaced with black text

Document Name	Document Number	Document Status	Created By	Type
A Cholecap Presentation (v0.1)	EF-0132	Draft	CSM User	Email Fragment
Master Email Fragment (with token) (v1.0)	MEF-0002	Approved	CSM User	Master Email Fragment





# Rendition Reporting

- Admins can now create ‘Document with Rendition’, ‘Rendition’, and ‘Rendition with Document’ report types
  - This feature provides organizations with greater transparency on the various system generated renditions associated to material in Vault

**Create Report**

Report Type\*

[Expand all](#) [Collapse all](#)

- ▼ **DOCUMENT**
  - Document
  - Document with Rendition** (Use to create reports on documents and their related renditions)
- ▶ **DOCUMENT RELATIONSHIP**
- ▶ **WORKFLOW**
- ▶ **DISTRIBUTION**
- ▶ **ACTIVITY**
- ▶ **BINDER**
- ▶ **CHANNEL USAGE**
- ▶ **CLAIM**
- ▶ **CLAIM TARGETS**
- ▶ **DOCUMENT USAGE**
- ▶ **PRODUCT**
- ▼ **RENDITION**
  - Rendition
  - Rendition with Documents** (Use to generate reports on document renditions and associated documents)



# Rendition Reporting

- ‘Document with Rendition’ report

★ PREVIEW: Documents with Rendition Report  
21R3 reporting feature Save

PROPERTIES  
Report Type Document with Rendition

FILTERS (1)

Expand all Collapse all

Document (43)							Rendition (123)					
Document Name ^	Document Number	Document Status	Type	Subtype	Created By	Document Size in KB	Filename	Rendition Count	Rendition Size in KB	Format	Rendition Type	Upload Date
▼ Document Name: Dog image - Auto render Adobe illustrator and Photoshop - 19R3 Demo (1)								7				
Dog image - Auto render Adobe illustrator and Photoshop - 19R3 Demo (v1.0)	asset-00206	Approved for Use	Component Asset	Image	CSM User	3,152.28	rendition.pdf	1	1,940.14	Portable Document Format (PDF)	Viewable Rendition	1/8/2020 12:14 PM EST
							bWRenditions_bwrenditions.jpeg	1	43.68	JPEG image	B&W renditions	1/8/2020 12:15 PM EST
							photoshop_photoshop.psd	1	9.05	Adobe Photoshop Document	Photoshop	1/8/2020 12:15 PM EST
							websiteRendition_websiterendition.jpeg	1	54.15	JPEG image	Website Rendition	1/8/2020 12:15 PM EST
							resourceGraphic_resourcegraphic.jpeg	1	19.91	JPEG image	Resource Graphic	1/8/2020 12:15 PM EST
							adobeillustrator_adobeillustrator.aai	1	2.00	Unknown	Adobe illustrator	1/8/2020 12:15 PM EST
							online72DpiRGB_online72dpirgb.jpeg	1	238.28	JPEG image	Online 72dpi RGB	1/8/2020 12:15 PM EST

‘Document with Rendition’ report can be used to monitor the total number and type of renditions associated to a document

- Considerations

- Admin can create document report types but can only add Rendition as a join object
- Learn more about [Configuring Report Types](#)





# Formula Fields in Multi-Pass Reports

- Users can now define formula fields directly in multi-pass reports and perform calculations across Reports views

The screenshot displays the Veeva report builder interface for an "Untitled Report". It is divided into several sections:

- PROPERTIES:** Report Type: Document with Created By User; Advanced Options: Multi-Pass.
- FORMULA FIELDS:** A table with columns: Label, Report View, Return Type, and Formula Expression. One field is defined: "Total Number of Days to AFD" (Document, Number) with the formula: `document_view_standard__c.documents.approved_for_distribution_date__c - document_view_standard__c.documents.document_creation_date__v`.
- CONDITIONAL FIELDS:** A section for defining conditions.
- FILTERS:** A filter is applied: "Document > Total Number of Days to AFD".
- Report Preview:** Shows a table with columns: "Document > Document Name", "Document > Document Number", "Date", "Approved for Distribution", "Document > Total Number of Days to AFD", and "Document > Created By". The "Total Number of Days to AFD" column is highlighted, showing it is used in a filter and a column.

Annotations in orange callouts:

- "Define formula expressions within the report builder" points to the Formula Expression field in the FORMULA FIELDS section.
- "Formula Fields can be used as report: Filters, Row groupings, Columns" points to the filter and column usage in the report preview.

# Formula Fields in Multi-Pass Reports



PREVIEW:Untitled Report

PROPERTIES  
Report Type Document with Created By User  
Advanced Options Multi-Pass

FILTERS (1)  
» Document > Total Number of Days to AFD is greater than "1"

Expand all Collapse all

Document

Document > Document Name	Document > Document Number	Document > Document	Document > Created Date	Document > Approved for Distribution Date	Document > Total Number of Days to AFD	Document > Created By	User > Name
Document > Product: CarDeo (14)							
Document > Total Number of Days to AFD: 5.0 (1)							
AdobeStock_37678493 (v1.0)	ASSET-21000094	Approved for Use	24/02/2021 03:58 EST	01/03/2021	5.0	Irina Modval	Irina Modval
Document > Total Number of Days to AFD: 10.0 (2)							
CarDeo Bandera 728x90 (v1.0)	ES-CD-2100002	Approved for Distribution	26/02/2021 12:38 EST	08/03/2021	10.0	Leo Garcia	Leo Garcia
CarDeo Bandera 160x600 (v1.0)	ES-CD-2100003	Approved for Distribution	26/02/2021 12:39 EST	08/03/2021	10.0	Leo Garcia	Leo Garcia

Formula Fields can be used as report:

- Filters
- Row groupings
- Columns

## • Considerations

- User can define up to 3 formula fields per report, this does not include the formula defined on the view levels
- Adding filters on formula fields will not improve the report execution time
- Learn more about [Multi-Pass Reporting](#)





# Enable Filter & Column Aliases Flag Moved to Report Builder Page



- The 'Enable Filter and Column Aliases' flag has been moved from the Report Create page to the Advanced Options section on the Report Builder page
  - This enhancement gives users the ability to activate the Filters and Column Aliases on existing reports in addition to newly created reports
- Learn more about [Enabling Filter & Column Aliases](#)

The screenshot displays two overlapping windows from the Veeva system. The background window is the 'Create Report' page, showing a 'Report Type\*' dropdown menu with a tree view of categories like DOCUMENT, WORKFLOW, and ACTIVITY. On the right side of this window, there is a 'Type' dropdown set to 'All Documents' and a checkbox labeled 'Enable filter and column aliases' which is currently unchecked. The foreground window is the 'Report Builder' page, showing a table with columns 'Document Name', 'Document Number', 'Document Status', and 'Created By'. Below the table, there is an 'ADVANCED OPTIONS' section containing 'Excel Template' and 'Export Options' sub-sections. In the 'Other Options' sub-section, the 'Enable filter and column aliases' checkbox is also present and unchecked. An orange arrow points from the checkbox in the 'Create Report' window to the checkbox in the 'Report Builder' window. A callout box with an orange background and white text says: 'The 'Enable Filter and Column Aliases' feature is now available in the Advance Options'.



# Increase Contains Operator Limit per Report



- Vault reports will now accommodate up to three filters that use the 'contains' operator
  - The 'contains' operator allows users to find relevant results by searching defined fields using a single word

The screenshot shows the 'Filters' section of a report configuration window titled 'Untitled Report'. The window has 'Cancel', 'Run', and 'Save' buttons in the top right. The 'Filters' section is expanded and contains three filter rows, each with a field name, an operator dropdown set to 'contains', a search text input field, and a 'Prompt' checkbox. The filters are: 1) 'Document Name' with search text 'brochure'; 2) 'Description' with search text 'new'; 3) 'Reason for Copy' with search text 'local'. Each search text field is highlighted in yellow. There is also an 'Add advanced logic' button at the bottom left of the filters section.

- Considerations
  - Long text/rich text, object reference, date/datetime, and boolean fields do not support the *contains* operator
  - Text will be matched as case sensitive
  - Users must enter at least three characters

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



# Report Field “Public Key” Renamed to “API Name”



- The “Public Key” field on the Reports Page and Report Views has been renamed to “API Name”

‘Public Key’ field renamed to ‘API Name’ on Reports page and Reports Views page (Admin)

All Reports ? Save View As

Name	Report Type	API Name	Description	Tags	Created By
★ <a href="#">Document Usage</a>	Document Usage Document Type Detail	document_usage__c	90 Day document usage report for steady state documents. Users of this report will be able to view usage by activity type, date, document, document type, and user.	Usage	System
★ <a href="#">Workload per Reviewer</a>	Workflow with Document	workload_per_reviewer__c		Tasks	Irina Modval
★ <a href="#">Claims by Category</a>	Claim Targets with Claim	claims_by_category__c			Irina Modval

★ Report Views ?

+ Create Search Columns

Name	Report Type	API Name	Description	Tags	Created By
<a href="#">Document</a>	Document	document_view_standard__c			System
<a href="#">User</a>	User	user_view_standard__c			System





# Usability & Interface



# Vault File Manager: New Icon

- The Vault File Manager has a new desktop and system tray icon



- Considerations

- This icon will also be displayed within Vault for certain actions as we extend the document file upload and download capabilities in Vault over the next few releases
- Learn more about [Vault File Manager](#)

# Text () Function Accepts Number Without Format



- This feature allows users to convert numbers to text using the Text() function without having to define a format
  - If no format is specified, Vault preserves the current number of decimal places defined for the number

Label	Object	Return Type	Formula Expression
Pages to Text	Document	Text	text(documents.pages__v)

Document > Pages to Text starts with 2

Group rows by Country

Sort groups by Country (A-Z)

In this example, the number value of the document Pages field is converted to text

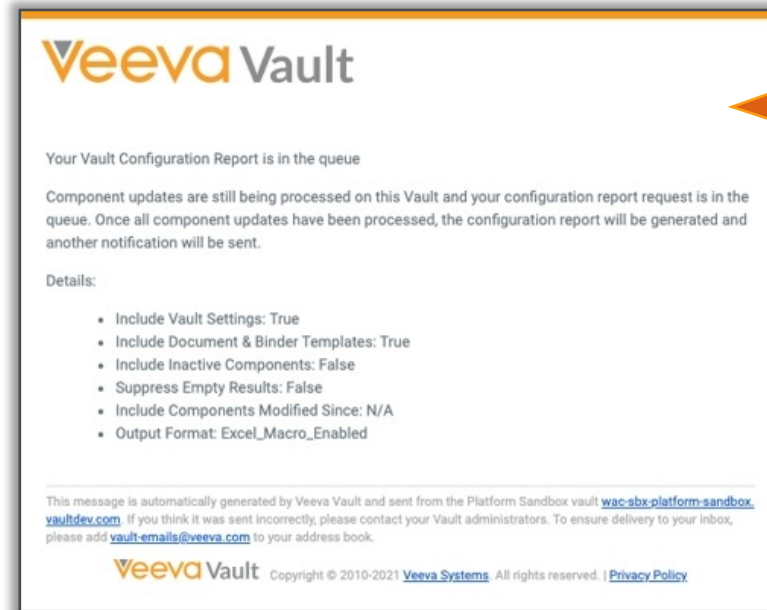


# Admin & Configuration

# Vault Configuration and Comparison Report Enhancements



- All Vault Configuration and Compare report requests are placed in a queue until all component configuration updates are complete
  - This enhancement will ensure that Configuration and Compare reports are accurate and reflect the latest updates to components



Report requesters will receive a notification when a report is placed into queue and a subsequent notification when the report is ready to download

- Considerations
  - The report request will attempt seven retries with an exponential back-off strategy in order to attempt to generate the report when all component updates are processed
  - Report jobs are available in: Admin > Operations > Job Status
  - Learn more about [Configuration Reports](#) and [Using Vault Compare](#)





# On Behalf Of Auditing Export Enhancements



- This feature improves audit logs containing the “on behalf of” Username entries by breaking the Username column into two fields within exports and API results
  - Before 21R3, both users appeared in the Username column as:
    - “tibanez@veeva.com on behalf of mmurray@veeva.com”

C
User Name
tibanez@veepharm.com on behalf of mmurray@veepharm.com

- As of 21R3, the users are now separated into two columns:
  - Username column: tibanez@veeva.com
  - New 'On Behalf Of' column: mmurray@veeva.com

C	D
User Name	On Behalf Of
tibanez@veepharm.com	mmurray@veepharm.com

- Considerations
  - Impacted audit trails include login, system, domain, object and document
  - New “on behalf of” column available in CSV exports and all API exports
  - Learn more about [Audit History](#)

# Remove Enable Document Usage Metrics Flag



- As of 21R3, Document Usage Metrics will be enabled by default in all Vaults
  - The Document Usage Metrics flag is being removed from the General Settings > 'Audit' section in Admin
- Learn more about [Document Usage Metrics](#)

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
- SAML Profiles
- OAuth 2.0 / OpenID Connect Profiles

### General Settings ?

**Vault Information**

Domain Name: usc8.com  
Vault ID: 22435  
Vault Name: DemoCSMOM  
Vault Version: 21R2.0  
POD: VV1-20

**Service Availability Notifications**

Email:

**License Information**

Vault Documents 906 out of 1,000  
Active User Licenses Full  
Read-only Licenses 0 out of 1,000  
External Licenses 0 out of 1,000  
Monthly Email Preview Count 0 out of 1,000

**API Information**

Burst API Count (last 5 min) 0 out of 2,000

**Audit**

Enable Document Usage Metrics

**Callout:** Before 21R3, the 'Enable Document Usage Metrics' Audit setting was available for enablement

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
- SAML Profiles
- OAuth 2.0 / OpenID Connect Profiles

### General Settings ?

**Vault Information**

Domain Name: sc20.com  
Vault ID: 80633  
Vault Name: CSM  
Vault Version: 21R2.2  
POD: VV1-1120

**Service Availability Notifications**

Email:

**License Information**

Vault Documents 929 out of 1,000  
Active User Licenses Full  
Read-only Licenses 0 out of 1,000  
External Licenses 0 out of 1,000  
Monthly Email Preview Count 0 out of 1,000

**API Information**

Burst API Count (last 5 min) 0 out of 2,000

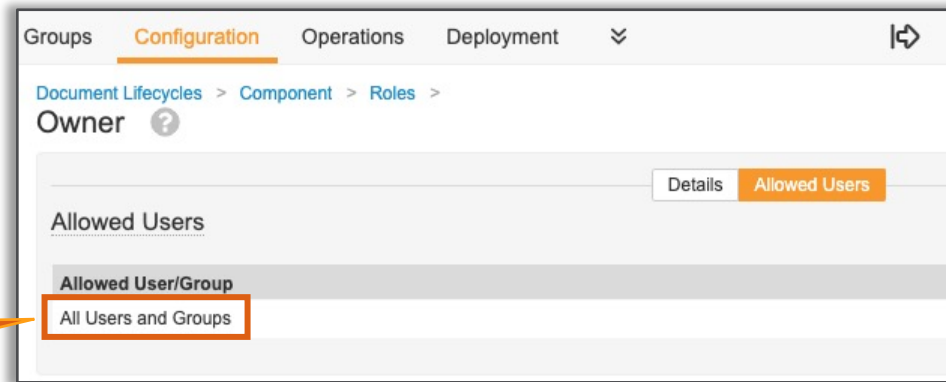
**Binder Options**

**Callout:** As of 21R3, the 'Enable Document Usage Metrics Audit' setting is removed and enabled by default

# Allowed Users When Assigning New Document Owner



- Admins can now configure the Owner lifecycle role to restrict who can be assigned as the new document owner
  - When re-assigning a new document owner, this feature will ensure only eligible users are selectable



- Considerations
  - Owner status assigned upon creation of the document is not affected by this feature
  - Allowed users default to All Users and Groups at upgrade time, preserving the behavior of the previous release
  - Learn more about [Document Owner role](#)
  - Learn more about [Defining Allowed & Default Users](#)



# Admin Configuration Tab Updates

- Configuration tab has a new appearance and usability improvements to increase ease of navigation across a large number of components

Admins can access a list of the available components or use predictive search

Recently Used section displays up to five of the most recently viewed pages for quick navigation

Click the Favorite icon to add it to your Favorites list

- Considerations

- Platform Configuration section contains platform defined section
- Application Configuration section contains app-defined configuration sections



# Details Page for Vault Users: Show in Tab Action on Related Object Sections



- The details page for the User Object now provides a 'Show in Tab' action on related object sections
- Learn more about the [User Object](#)

The screenshot displays the Veeva Vault interface for the 'Users & Groups' section. The main content area shows the details for 'User: Vlad Maystr', which is currently 'Active'. Below this, there are several expandable sections: 'General Info', 'Details', 'Email Preferences', 'User Role Setup', 'Workflow Timeline', 'Groups', and 'Inbox Documents: Sharing'. The 'User Role Setup' section is expanded, showing a table with columns for 'Name', 'User', and 'Role'. A red box highlights the 'Show in Tab' button located above the table. An orange arrow points from this button to a secondary window titled 'User Role Setup' that is open in a separate browser tab. This secondary window shows the same table data and includes a 'Back to previous page' link. The top navigation bar of the main interface includes 'Business Admin', 'Logs', 'Users & Groups', 'Configuration', 'Operations', 'Deployment', 'Connections', and 'Settings'. The secondary window has its own navigation bar with 'Tasks', 'Library', 'Claims', 'Content Modules', 'Reports', 'Dashboards', 'Admin Tools', and 'Portal'.

Name	User	Role
DAC-000308	Vlad Maystr	Coordinator
DAC-000309	Vlad Maystr	Reviewer





# Saved View Admin

- This feature provides Admins with a tool to manage system and user-saved library views

The screenshot shows the 'Configuration' section of the application. The left sidebar contains 'COMPONENTS', 'RECENTLY USED', and 'FAVORITES'. The main content area is titled 'Platform Configurations' and includes a 'USER INTERFACE' section with a list of items: Page Links, Pages, Tabs, and Views. The 'Views' item is highlighted with a red box and a callout bubble.

**Find Admin Views:**  
Admin > Configuration > User Interface > Views

1) Admins can search views by name, description, tab, and owner

2) A new Managed attribute distinguishes between  
• User views (Managed = No)  
• Admin-configured views (Managed = Yes)

3) Admins can choose to include non-managed views in the list

Name	Description	Tab	Owner	View Criteria Type	Mandatory	Managed	Created Date
Due in next 7 days		Tasks	System	Created in Tab	Yes	Yes	04/11/2020 17:45 EET
Inputs (remap fields)		Form Mapping	System	Created in Tab	Yes	Yes	04/11/2020 17:45 EET
Root		Form Mapping	System	Created in Tab	Yes	Yes	04/11/2020 17:45 EET
Roots (form template)		Form Mapping	System	Created in Tab	Yes	Yes	04/11/2020 17:45 EET





# Saved View Admin

The screenshot shows the 'Views' management page in the Veeva Business Admin interface. The page includes a navigation menu at the top (Business Admin, Logs, Users & Groups, Configuration, Operations, Deployment, Connections, Settings) and a left sidebar with 'COMPONENTS' and 'RECENTLY USED' sections. The main content area displays a table of saved views with columns for Name, Tab, Owner, View Criteria Type, Mandatory, Managed, and Created Date. A modal dialog titled 'Assign Owner: Components' is open, showing a dropdown menu for selecting a new owner. Three callouts provide instructions: 4) Admins can access Saved View management actions using the ellipse; 5) Admins can re-assign ownership of Saved Views when necessary; 6) Admins can view and edit Saved View configuration by clicking on the view Name.

Name	Tab	Owner	View Criteria Type	Mandatory	Managed	Created Date
Due in the Next 7 Days	Tasks	System	Created in Tab	No	No	04/11/2020 17:45 EET
Due in next 7 days	Tasks	System	Created in Tab	Yes	Yes	04/11/2020 17:45 EET
Roots (form template)	Form Mapping	System	Created in Tab	No	No	04/11/2020 17:45 EET
Inputs (remap fields)	Form Mapping	System	Created in Tab	No	No	04/11/2020 17:45 EET
Materials	Library	System	Created in Tab	No	No	04/11/2020 17:45 EET
Compliance Pack	Library	System	Created in Tab	No	No	04/11/2020 17:45 EET
Materials	Library	System	Created in Tab	No	No	04/11/2020 17:45 EET
References	Library	System	Created in Tab	No	No	04/11/2020 17:45 EET
Components	Library	System	Created in Tab	No	No	04/11/2020 17:45 EET

4) Admins can access Saved View management actions using the ellipse

5) Admins can re-assign ownership of Saved Views when necessary

6) Admins can view and edit Saved View configuration by clicking on the view Name





# Saved View Admin

The screenshot shows the 'Materials' configuration page in the 'Configuration' section of the Veeva system. The page includes a left sidebar with navigation options like 'COMPONENTS', 'RECENTLY USED', and 'FAVORITES'. The main content area displays the following configuration details:

- Tab:** Library
- View Label:** Materials
- View Name:** materials1\_\_c
- Status:** Active
- Owner:** System
- Description:** cube
- Icon:** cube
- Visible to:** All Internal Users (with a dropdown arrow)
- Options:** Two checkboxes are present: 'Users cannot remove this view from the view section of the tab' and 'Make this view managed as part of the Vault configuration', both currently unchecked.
- Search Criteria:** Document Types: Material

Three callout boxes provide additional context:

- 7) Admins can set mandatory and managed attributes:** Points to the two unchecked checkboxes under the 'Visible to' section.
- 8) Admins can adjust Saved View visibility:** Points to the 'Visible to' dropdown menu.
- 9) Admins can preview Saved View search criteria:** Points to the 'Search Criteria' field.





# Saved View Admin

The screenshot displays the 'Configuration' menu with a 'Views' sub-menu. A callout box points to the '+ Create' button in the 'Views' list, stating: "10) Admins can create new views directly from the configuration menu". The 'Create View' form is shown with the following fields: 'View Label\*' (Approved Docs), 'View Name\*' (approved\_docs), 'Status' (Active), 'Description' (View with approved content), 'Icon', 'Visible to' (All Internal Users), and 'Criteria VQL' (status\_\_v = steadystate()). A callout box points to the 'Criteria VQL' field, stating: "11) Admin can create VQL-based views".

- Considerations

- VQL-based views cannot be created from the home tab
- The search criteria for views created in the tab cannot be edited by the admin
- Since VQL-based views behave as standard views, they share user preferences. This means only search criteria can be stored
  - Does not include columns, column width, column order, sorting, displayed filters, etc.





# Veeva ID Field on Person Object

- A *Veeva ID* (veeva\_id\_\_v) text field is now added to the Person object for support of cross-product integrations

The screenshot shows the configuration page for the 'Veeva ID' field on the Person object. The breadcrumb trail is 'Objects > Person > Fields > Veeva ID'. The 'Details' section includes the following information:

- Label:** Veeva ID (highlighted with a red box and a callout bubble stating 'Veeva ID system-managed field added to Person object')
- Status:** Active
- Source:** System
- Name:** veeva\_id\_\_sys
- Data Type:** Text (50)
- Help Content:** (link)

The 'Options' section contains the following checkboxes, all of which are currently unchecked:

- User must always enter a value (required)
- Values must be unique
- Display in default lists and hovercards
- Do not copy this field in Copy Record
- Contains Protected Health Information (PHI) or Personally Identifiable Information (PII)

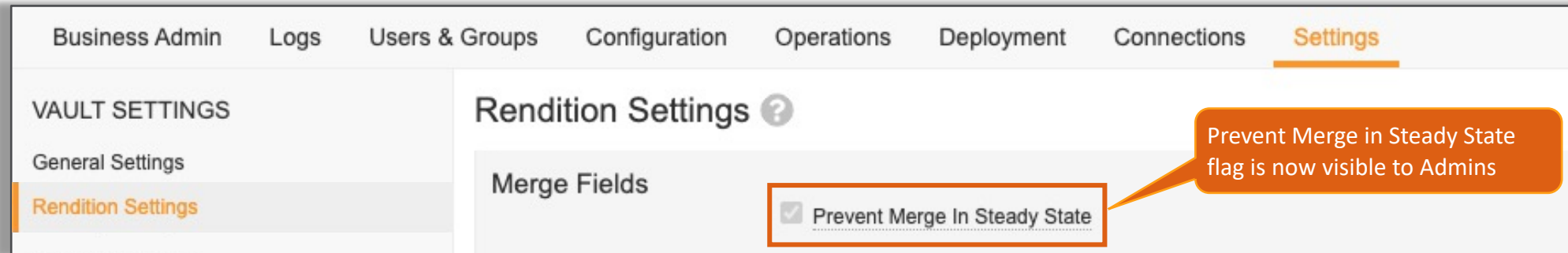
- Considerations
  - The *Veeva ID* field is a system-managed field
  - Field is automatically populated by Veeva applications only for cross-product integrations
  - Field cannot manually be populated by users
  - Learn more about the [Person Object](#)



# Prevent Merge in Steady State Rendition Setting



- Prevent Merge in Steady State setting is now accessible by Admins
  - This setting disables the auto merging of documents when the document is in a steady state in order to preserve the final form of documents that have been finalized and approved

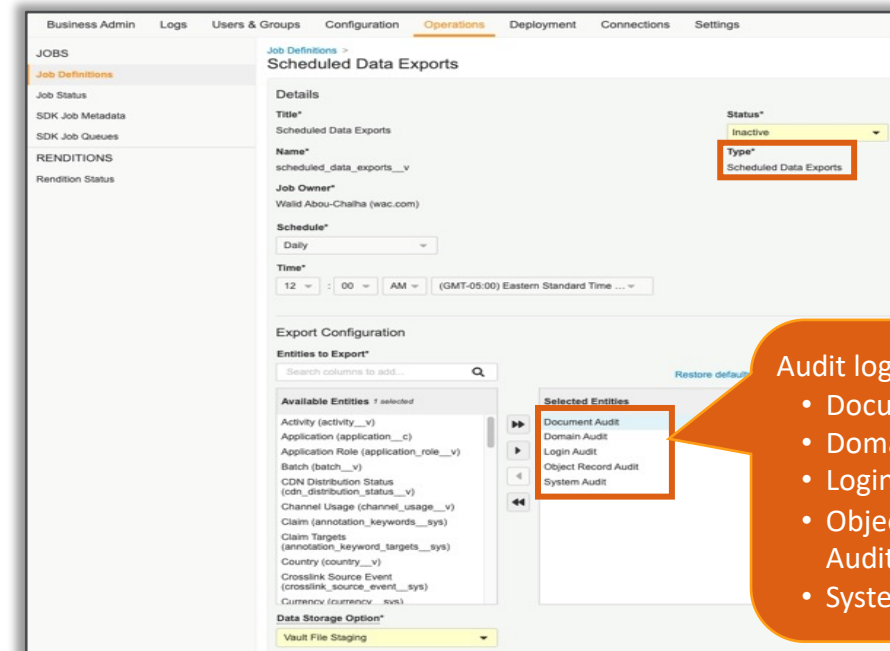


- Considerations
  - Lifecycle State must be assigned to the System Lifecycle Steady State
  - Learn more about [Using Merge Fields for Microsoft Word™ & Excel™](#)
- Configuration
  - Settings > Rendition Settings > Merge Fields > *Prevent Merge In Steady State*
  - This setting will reflect existing Vault configuration



# Audit Data Available in Scheduled Data Exports

- You can now include audit history data in scheduled data exports
  - Supported audit logs include:
    - System Audit, Login Audit, Document Audit, Object Record Audit, and Domain Audit
- This feature will enable customers to load their Vault audit data into their enterprise data lakes, data warehouses, or business intelligence reporting services
- Considerations
  - Audit Data limited to daily deltas (new audit entries in the last 24hrs)
  - Learn more about [Scheduled Data Exports](#)
- Configuration
  - Admin > Operations > Job Definitions > [Scheduled Data Export] > Edit



Audit logs available:

- Document Audit
- Domain Audit
- Login Audit
- Object Record Audit
- System Audit





# Scheduled Data Exports: Reset Custom Amazon S3 Settings

- Admins can now reset previously configured Amazon S3 Bucket settings
- Configuration
  - Settings > Vault Settings > Scheduled Data Export Settings > Edit

The screenshot shows the Veeva Vault Settings interface. The top navigation bar includes Business Admin, Logs, Users & Groups, Configuration, Operations, Deployment, Connections, and Settings. The left sidebar lists various settings categories under VAULT SETTINGS and DOMAIN SETTINGS. The main content area is titled 'Scheduled Data Export Settings' and shows the 'Custom Amazon S3 Bucket' configuration. The 'S3 Endpoint\*' field contains 's3-accesspoint.eu-west-2.amazonaws.com' and the 'S3 Bucket Name\*' field contains 'vault-production'. There are 'Download Verification File', 'Reset', and 'Validate' buttons. A dialog box titled 'Reset Custom Amazon S3 Settings' is overlaid, warning that resetting will remove all S3 information and cannot be undone. The dialog has 'Cancel' and 'Continue' buttons. An orange callout box points to the 'Reset' button with the text: 'Click Reset to remove the previously-added configuration'.



# Email to Vault

- Vault can now be configured to receive emails to a Vault-owned email address and automatically convert the email to documents, records, and attachments
  - One default email processor is included with each Vault, to create unclassified documents from incoming emails

**Vault-owned email address**

**The email Subject Line is used for the Document Name**

**Document Inbox**

By default, emails are assigned to the Undefined Type and placed into the Document Inbox

Name	Status	Product	Type	Created By	Expiration Date
Cholecap Documents (v0.1)	Unclassified		Undefined	System	

**Cholecap Documents (v0.1)** Unclassified

**Attachments (2)**

- PP---2020-0001 Happy Patient Presentation - Version Comparison V2.pptx (1.9 MB)
- Related Portals-.pptx (590.1 KB)





# Email to Vault

- Considerations

- Admin can use Email Processors (written by platform/apps/customers using Java SDK) to target specific use cases
- Vault validates emails before processing them (spam, virus, etc.)
- Emails sent with the subject line “Email to Vault Test” provide administrators with a way to confirm that their first Inbound Email Address is ready for use without running the Email Processor
  - This check is not required for subsequent Inbound Email Addresses
- The Email object can be added to the Business Admin menu to monitor inbound Emails to Vault

Name	Recipient Email Address	Recipient Email Username	Sender Email Address	Sent Date	Subject
★ EML-000001	create.doc@usc8-democsmom.veevavault.com	create.doc	orville.mills@veeva.com	9/28/2021 3:22 PM EDT	Cholecap
★ EML-000002	create.doc1@usc8-democsmom.veevavault.com	create.doc1	orville.mills@veeva.com	10/11/2021 11:37 AM EDT	Feedback on Cholecap Documents for new campaign
★ EML-000003	create.doc1@usc8-democsmom.veevavault.com	create.doc1	orville.mills@veeva.com	10/11/2021 11:40 AM EDT	Feedback on Cholecap Documents for new campaign 2
★ EML-000004	create.doc@usc8-democsmom.veevavault.com	create.doc	orville.mills@veeva.com	10/11/2021 11:40 AM EDT	Feedback on Cholecap Documents for new campaign 2
★ EML-000005	create.doc1@usc8-democsmom.veevavault.com	create.doc1	vlad.maystr@veeva.com	10/11/2021 11:59 AM EDT	Cholecap feedback
★ EML-000006	create.doc@usc8-democsmom.veevavault.com	create.doc	vlad.maystr@veeva.com	10/11/2021 11:59 AM EDT	Cholecap feedback
★ EML-000007	create.doc@usc8-democsmom.veevavault.com	create.doc	orville.mills@veeva.com	10/11/2021 12:03 PM EDT	Re: Feedback on Cholecap Documents for new campaign 2
★ EML-000008	create.doc1@usc8-democsmom.veevavault.com	create.doc1	orville.mills@veeva.com	10/11/2021 12:03 PM EDT	Re: Feedback on Cholecap Documents for new campaign 2

The Inbound Email Addresses listing page provides a help link and the ability to edit columns

- Learn more about [Configuring Email to Vault](#)





# Email to Vault

- Configuration

- Admin > Configuration > Inbound Email Addresses > [Create]
- Learn more about [Configuring Email to Vault](#)

The screenshot shows the 'Create Inbound Email Address' form in the Veeva Vault interface. The form is titled 'Inbound Email Addresses' and has a '+ Create' button. The breadcrumb trail is 'Admin > Configuration > Inbound Email Addresses > [Create]'. The form is divided into 'Details' and 'Options' sections. The 'Details' section includes fields for 'Label\*' (set to 'Create Document'), 'Name\*' (set to 'create\_document'), 'Status' (set to 'Active'), and 'Description'. The 'Options' section includes 'Email Address\*' (set to 'create.doc@usc8-democsmom.veevavault.com'), 'Email Processor\*' (set to 'Create Document from Email'), 'Allowed Senders\*' (set to 'All Users & Persons in this Vault'), and 'Email Processor User\*' (set to 'CSM User'). There is also a checkbox for 'Authenticate Sender' which is checked. Four callout boxes provide additional information: 1. 'Define a label for the inbound email address' points to the 'Label\*' field. 2. 'Define a Vault-owned email address for inbound emails to be sent to' points to the 'Email Address\*' field. 3. 'The list of Allowed Senders is filtered by the selected Email Processor' points to the 'Allowed Senders\*' field. 4. 'The Email Processor User is not required if the Allowed Senders is always a Vault User' points to the 'Email Processor User\*' field.





# Re-Render Previous Rendition Versions

- Vault users with the *Vault Owner Action: Re-render* permission can now re-render the non-current version of a rendition

Non-current version rendering can be re-triggered

The screenshot shows the Veeva Vault interface for a document titled "CarDeo Brochure (1) (v0.1)". The document is in the "Pre-Approval" stage. A callout box indicates that the latest viewable version is 0.3. The "MANAGE" dropdown menu is open, and the "Re-render Document" option is highlighted. The document information panel shows the following details:

Field	Value
Name	CarDeo Brochure (1) (v0.1)
Description	
Tags	New
Document Number	GL-CD-2
Version	0.1
Status	Revise a
Country	Global
Product	CarDeo
Lifecycle	Material
Type	Material
Subtype	Healthca
Created By	Lisa Wood on 10/03/2021 18:30 EET
Last Modified By	System on 22/03/2021 22:38 EET
Copy Depth	

Action is available only to users with Vault Owner Action: Re-render permission enabled





# Re-Render Previous Rendition Versions

- Configuration

- User & Groups > Permission Sets > [Permission Set] > Application tab > Vault Owner Actions > *Re-render*

The screenshot shows the Veeva Vault configuration interface. The top navigation bar includes Business Admin, Logs, Users & Groups (selected), Configuration, Operations, Deployment, Connections, and Settings. The left sidebar lists navigation options: USERS & GROUPS, Vault Users, Active Delegations, Groups, Security Profiles, Permission Sets (selected), and Application Roles. The main content area is titled 'PromoMats User Actions' and has tabs for Details, Admin, Application (selected), Objects, Tabs, and Pages. Under the 'Application' tab, there is a section for 'Vault Owner Actions' with a table of permissions. The 'Re-render' column is highlighted with a red box and contains a checkmark. Other columns include Power Delete, Vault Loader, Record Migration, and Document Migration, all of which also have checkmarks. Below this, there are sections for 'All Document Actions' (All Document Read, All Document Create) and 'All Object Record Actions' (All Object Record Read, All Object Record Edit, All Object Record Delete), each with checkmarks. At the bottom, there are 'Apply' and 'Remove' buttons.

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

	All Document Actions	All Document Read	All Document Create
All Documents	✓	✓	✓

	All Object Record Actions	All Object Record Read	All Object Record Edit	All Object Record Delete
All Object Records	✓	✓	✓	✓

	Apply	Remove
Legal Hold	✓	✓



Vault Loader

# Vault Loader Extract: Include All Rendition Types in CSV Export



- The Documents and Document Versions object type data exports will include metadata for all available rendition types when the 'Include Renditions' option is selected

A screenshot of the 'Vault Loader: Extract' configuration window. The window title is 'Vault Loader: Extract' with a help icon. The 'Object Type\*' dropdown is set to 'Documents'. The 'Document Types' field is set to 'Material'. There are five checkboxes: 'Include Non-editable Fields' (unchecked), 'Only Extract Column Headers' (unchecked), 'Include Source Files' (unchecked), 'Include Renditions' (checked and highlighted with a red box), and 'Override Default Column Selection' (unchecked). Below these is a 'Where Clause' text area. At the bottom, there is a 'Validate' button, a 'Cancel' button, and an 'Extract' button. A link 'Need help with Query Syntax & Structure?' is also present.

– Learn more about [Managing Rendition Types](#) and [Creating Automated Image Renditions](#)



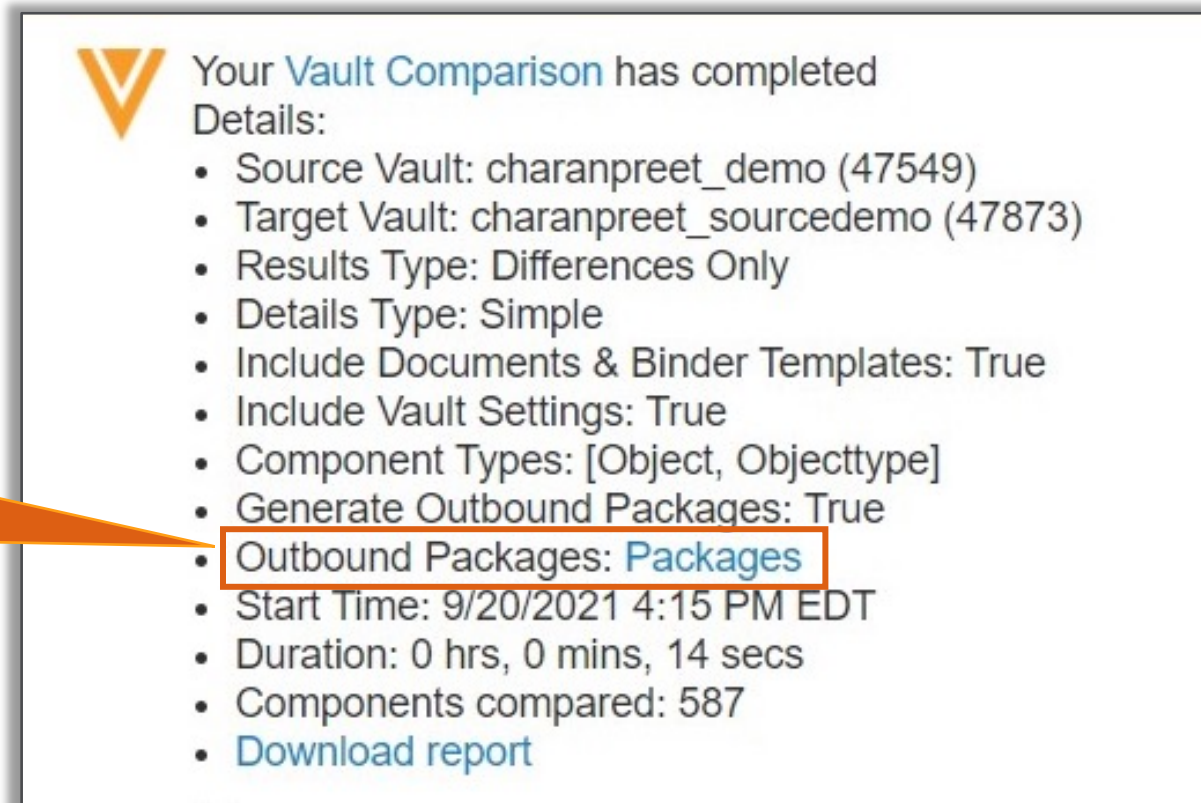
# Vault Loader: Updating Object References with Map Fields Enabled


- Vault Loader will now remove corresponding object references on the object record when loading empty or blank object reference field values in a CSV with Map Fields
  - Previously, Vault ignored empty object reference values in the CSV input file when Map Fields were enabled

# Notification Update with Auto Generate VPK Enabled



- Vault Compare report notifications with Auto Generate VPK enabled will now display a link to the outbound packages page instead of a link to each package file when there are more than 40 packages generated with the report



 Your [Vault Comparison](#) has completed  
Details:

- Source Vault: charanpreet\_demo (47549)
- Target Vault: charanpreet\_sourcedemo (47873)
- Results Type: Differences Only
- Details Type: Simple
- Include Documents & Binder Templates: True
- Include Vault Settings: True
- Component Types: [Object, Objecttype]
- Generate Outbound Packages: True
- **Outbound Packages: [Packages](#)**
- Start Time: 9/20/2021 4:15 PM EDT
- Duration: 0 hrs, 0 mins, 14 secs
- Components compared: 587
- [Download report](#)

If the number of generated packages is below 40, notification will list all the individual package records





PromoMats



# Positive / Negative Lists

- This feature provides a standard object and standard fields for tagging content as being required required for Positive and Negative lists in the French market
  - *Add to Positive/Negative List*
  - *Positive/Negative List Name*
  - *Delivery to HCPs*
- Positive/Negative fields can be exposed in CRM to provide Reps with these details and when print materials have expired and must be destroyed
- Considerations
  - Services engagement required to integrate feature with CRM myInsights and Vault Data Hub
  - If using the Veeva CRM myInsights integration, it is recommended to create only 1 Positive/Negative List object record rather than several, as CRM only uses one record
    - Configuration slides does not reflect myInsights integration
  - Access [Positive/Negative List Report VPKs](#)

▼ Submission Details	
Submission Required?	No
One Off Use	
Reason Not Submitted	test
Health Authority Decision	
Health Authority Decision Date	
ML Version	
Dissemination / Publication Date	
Add to Positive/ Negative List	Yes
Positive/Negative List Name	<a href="#">Positive List - Test</a>
Delivery to HCPs	Authorized
Material ID	FR-CH-2100005-1
Revision	1
Update	Yes

Positive/Negative List fields are suggested to be added to 'Submission Details' Section





# Positive / Negative Lists

- Configuration

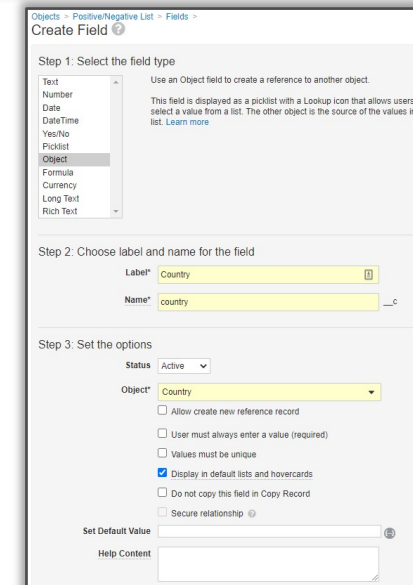
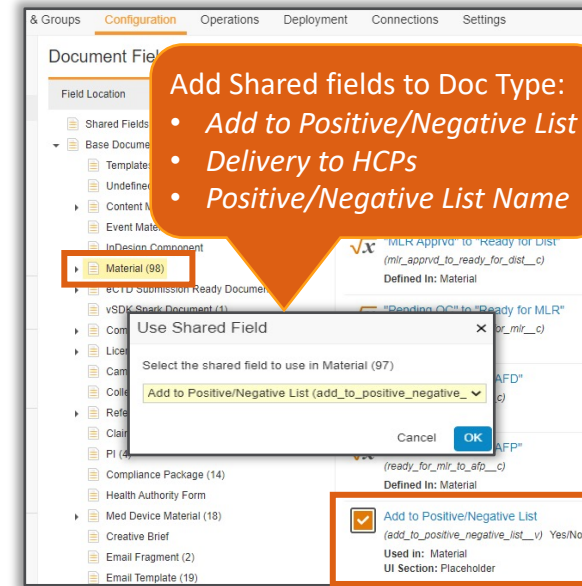
- Admin > Configuration > Document Fields > [Doc Type] > Add Shared Fields

- *Add to Positive/Negative List*
- *Delivery to HCPs*
- *Positive/Negative List Name*

- Admin > Configuration > Objects > [Positive/Negative List] > Fields

- Configure field dependencies on the Doc Type as required

- Learn more about [Positive/Negative Lists \(PromoMats\)](#)



# eCTD – Additional Material Information in the Binder



- This feature adds the *Promotional Material Document Name* and *Promotional Material Document Description* fields to be utilized in the eCTD binder on the clean material
  - When an eCTD binder with these fields is generated, Vault copies the values from the promotional material into the fields on the Clean Material so it can be used on the Correspondence Letters, Form FDA 2253, and Supplementary Forms

**Draft** | In Review | Submission Ready

**CHOLECAP.**  
WHEN DIET & EXERCISE ARE NOT ENOUGH.

**INFORMATION**

**General**

Name: cholecapwhendietandexercisearenotenuogh-cm  
 Document Number: eCTD-2104-00005  
 Description: [Empty]  
 Version: 0.3  
 Status: Draft  
 Type: eCTD Submission Ready Documents  
 Subtype: Submission Ready Copies  
 Classification: Clean Material  
 Reclassify

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
Food and Drug Administration

**TRANSMITTAL OF ADVERTISEMENTS AND PROMOTIONAL LABELING FOR DRUGS AND BIOLOGICS FOR HUMAN USE**

2. Application Information: Application Type: NDA, Application Number: 020701

3. Proprietary Name: Cholecap

4. Established Name: veevastatin

5. Package Insert Date and ID Number: Cholecap PI LAB-03480 4.0 June 2017

6. Manufacturer Name: Verteo Biopharma

7. Advertisement / Promotional Labeling Materials

Material Type (use FDA codes)	Dissemination / Publication Date	Material ID Code	Material Description	
Sales Aid	04/28/2021	US-CH-2100006	cholecapwhendietandexercisearenotenuogh-cm	Delete Row
Sales Aid	04/28/2021	US-VD-2100001	voderalprogram-cm	Delete Row
Sales Aid	04/28/2021	US-CH-2100009	voderal&cholecapcombinationpill-cm	Delete Row

**Submission Ready** | Submitted

**INFORMATION**

General

Standard Metrics

File Info

**eCTD Submission Details**

Promotional Material Document Type: Promotional 2253  
 Professional / Consumer: Professional  
 Actual Submitted Date: [Empty]  
 Primary Submission: Post CH WD testing Mat id and doc name  
 Promotional Document Number: US-Chole-2100002  
 Promotional Material Doc Description: Cholecap 2021 Information  
 Promotional Material Doc Name: Promo 1 Cholecap

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
Food and Drug Administration

**TRANSMITTAL OF ADVERTISEMENTS AND PROMOTIONAL LABELING FOR DRUGS AND BIOLOGICS FOR HUMAN USE**

2. Application Information: Application Type: NDA, Application Number: 123456

3. Proprietary Name: Cholecap

4. Established Name: CH

5. Package Insert Date and ID Number: PI 1 Cholecap

6. Manufacturer Name: test

7. Advertisement / Promotional Labeling Materials

Material Type (use FDA codes)	Date	Material ID Code	Material Description	
Carton	04/20/2021	US-Chole-2100002-1	Promo 1 Cholecap	Delete Row

Before: Material Description field in 2253 form populated with Clean Material Document Name

After: Material Description field in 2253 form populated with Promotional Material Doc Name (or Promotional Material Doc Description) field



# eCTD – Additional Material Information in the Binder



- Considerations

- Either the *Promotional Material Document Name* OR *Promotional Material Document Description* fields can be used to populate the forms, not both
- These two fields can be utilized with the Vault PromoMats – RIM connection, if established
- eCTD Binders using the Final Video/Audio Rendition type will have the same *Promotional Material Document Name* or *Promotional Material Document Description* on the Clean Material Story Board document and the Video or Audio File. To change this:
  - Make the *Promotional Material Doc Name* or *Promotional Material Doc Description* fields editable
  - Update field on the video
  - Select ‘generate form’ to update value on 2253 form
  - Re-render Correspondence Letter

- Configuration

- Learn more about [Promotional Material Document Name and Description Fields Configuration](#)
- Learn more about [eCTD Compliance Packages](#)

# eCTD – Additional Material Information in the Binder



- The *Promotional Material ID* can now be added to the Annotated Label or Annotated Reference document types, allowing Vault to copy the *Material ID* from the promotional material onto these documents
- Considerations
  - Required for the PromoMats - RIM Vault Connection
- Configuration
  - Enable the *Material ID* feature, if not yet configured
  - Add *Material ID* field to following doc type/sub type/classifications:
    - Annotated Label
    - Annotated Reference
  - Execute MDL to update Material ID in RIM to use new *Material ID* field from PromoMats
    - Veeva Services can assist, but can be done via Postman

▼ Submission Details

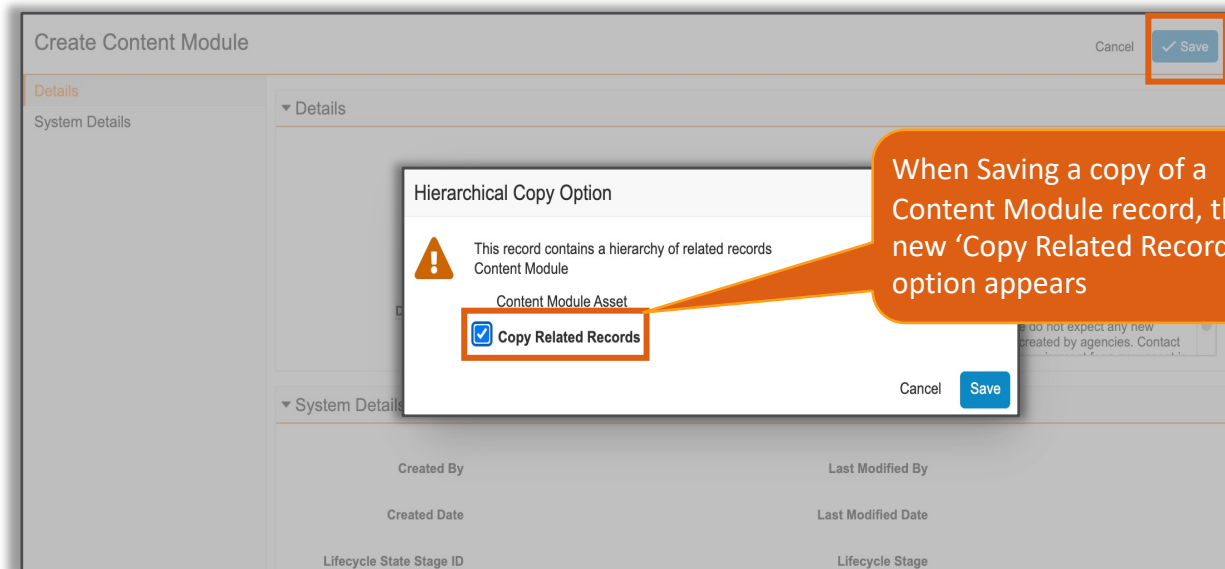
<b>Submission Required?</b>	No
<b>One Off Use</b>	No
<b>Reason Not Submitted</b>	test
<b>Health Authority Decision</b>	
<b>Health Authority Decision Date</b>	
<b>Dissemination / Publication Date</b>	
<b>Material ID</b>	US-CH-2100010-1
<b>Revision</b>	1
<b>Update</b>	Yes

*Material ID* fields configured in Submission Details section



# Content Modules: Hierarchical Copy

- The new Content Module 'Copy Related Record' feature allows users to perform a deep copy of a Content Module object record, which clones all relationships to other object records and all associated metadata
  - Prior to 21R3, when copying a Content Module, only the module's Detail metadata was copied



# Content Modules: Hierarchical Copy



- Considerations

- Users can still choose to solely copy the Content Module's Detail metadata
- Content Module metadata will be cloned, and user can change field values as necessary
- Approval Document of original Content Module will not be cloned
- User who performs hierarchical copy must have 'Create' permissions on the Content Module Asset object
- Learn more about [Content Modules](#)

- Configuration

- Objects > [Content Module Asset] > Fields > [Parent Module] > Edit > Enable 'Allow hierarchical copy'

Options

- User must always enter a value (required)
- Display in default lists and hovercards
- Do not copy this field in Copy Record
- Allow create new reference record
- Secure relationship ?

**Outbound Relationship Name** parent\_module\_\_vr

**Inbound Relationship Label** ModuleAsset

**Inbound Relationship Name** module\_asset\_\_vr

**Deletion Rules** Prevent deletion if there are children records

Allow hierarchical copy



MedComms



# Dedicated Medical Inquiry User Interface

- Users can now capture Multiple Case Requests, Case Responses, Adverse Events, POCs custom objects all in one place

Notepad can be used to capture notes while on the call and referenced when filling out fields

Users can add additional case requests in one screen

Users can add multiple responses to the case request

- Considerations

- 21R3 – Requires a Product Support request for enablement
- 22R1 – This feature will be configurable by Admin
- Learn more about [Medical Inquiry](#)

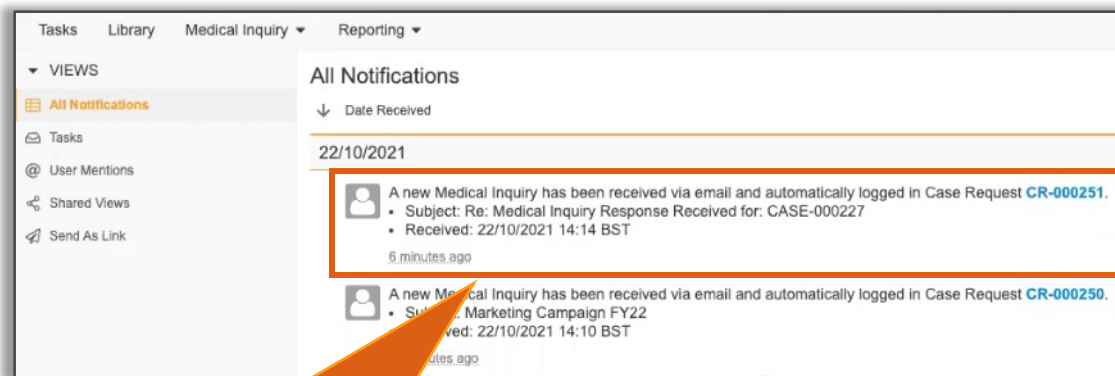




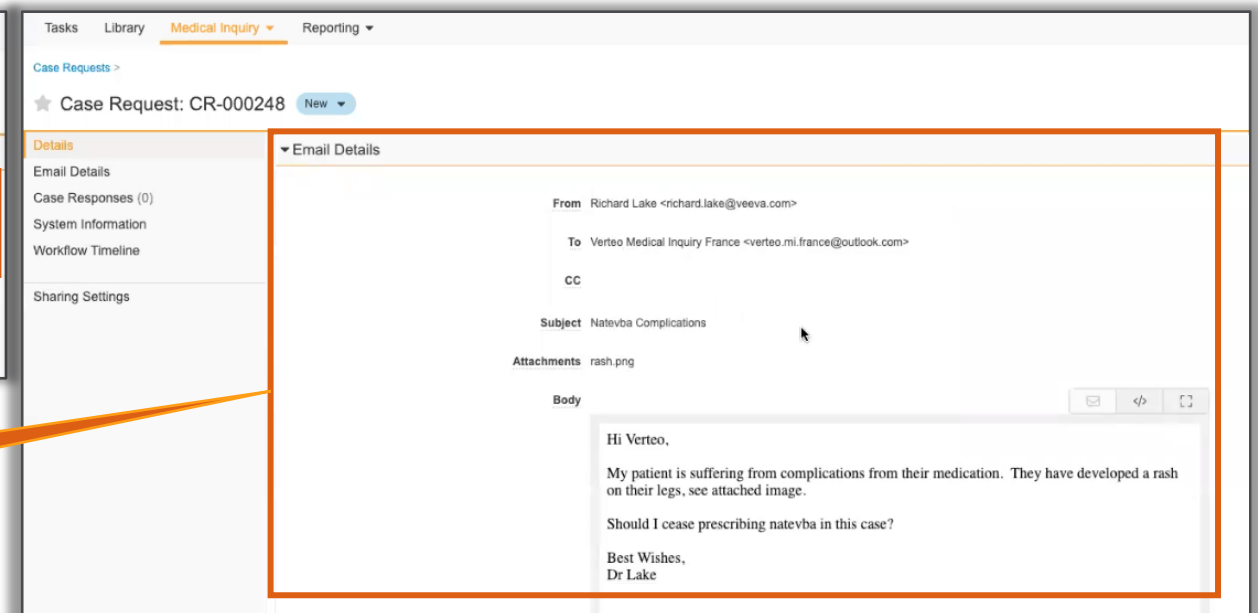
# Automated Email Intake for Medical Inquiries



- MedComms can now be configured to automatically ingest Medical Inquiries from emails received to a dedicated email address
  - Previously, MedComms users had to open an inquiry in their email client and manually enter the information into MedComms
  - Follow-up emails received as a response from the HCP will be included as a new Case Request on the existing Case object record
  - Admins can pre-configure a set of email addresses for forwarding emails that have been miscategorized by the sender



Users will receive notifications when a new medical inquiry email has been ingested



All the email information is automatically added to the case request record-- Attachments are also supported

# Automated Email Intake for Medical Inquiries



- Considerations

- Admins can configure a separate Inbox tab to monitor all the incoming Case Requests generated from direct processing of incoming emails
- Case Requests are matched to existing received/sent emails. Users can choose to move Case Requests to a different/new Case
- Records are created without some of the required metadata (e.g. Product), responsible users will have to enter this data manually
- Email body field is limited to 32,000 characters. If email runs longer, users can use the *Download Original Email & Attachments* action to view the complete email along with attached files
- Medical Inquiry Inbox is required to redirect emails to a designated Vault Inbound Email Address
- Vault validates emails before processing them (spam, virus, etc.)

- Configuration

- Please reach out to Veeva Services to discuss implementation of this feature
- Learn more about [Configuring Automated Email Intake for Medical Inquiries](#)



MultiChannel

# CLM Metadata Enhancements for Medical Affairs



- PromoMats and MedComms now captures richer metadata at the point of content creation
- A new shared field is available CRM Searchable Description
  - This text is searchable in CRM
- Learn more about [Working with CLM Content](#)

The screenshot shows the 'INFORMATION' page for a document titled 'Natevba Prescribing Information'. The page is divided into two sections: 'General' and 'CLM Properties'. The 'General' section contains the following metadata:

<b>Name</b>	Natevba Prescribing Information
<b>Title</b>	
<b>Type</b>	Medical Library
<b>Subtype</b>	Prescribing Information
	<a href="#">Reclassify</a>
<b>Country</b>	<a href="#">United States</a>
<b>Product</b>	<a href="#">Natevba</a>
<b>Document Number</b>	MED-NAT-US-0007
<b>Created By</b>	Pat Jones on 5/6/2020 4:36 PM EDT
<b>Last Modified By</b>	System on 9/19/2021 1:07 AM EDT
<b>Version</b>	3.0
<b>Lifecycle</b>	Medical Library
<b>Status</b>	Approved for Use
<b>Lifecycle State Stage ID</b>	<a href="#">STATESTAGE-000028</a>
<b>Lifecycle Stage</b>	<a href="#">Approved for Use</a>

The 'CLM Properties' section is currently collapsed, but the 'CRM Searchable Description' field is visible at the bottom of the list.

*CRM Searchable Description (max length 1500) will display in the 'CLM Properties' section*

# CLM Metadata Enhancements for Medical Affairs



- Configuration

- To Activate Field: Admin > Configuration > Document Fields > Shared Fields > Activate *CRM Searchable Description*

Document Fields >  
CRM Searchable Description

Details ?

Label CRM Searchable Description

Status **ACTIVE**

Source Standard Field

Name crm\_searchable\_description\_\_v

Field Type Text

Used in None

Help Content Description Text that is searchable in CRM.

Options

User must always enter a value (required)

Do not copy this field during Make a Copy

Display Section CLM Properties

Maximum Length 1500

- To Add Field to Document Type: Navigate to Document Fields > Select Document Type > Add Existing Shared Field to Document Type

Medical Library (8)  
(local fields only)

Add

Author  
(author\_\_c) Text (100)  
Used in: Medical Library  
UI Section: Publication Details

CRM Searchable Description  
(crm\_searchable\_description\_\_v) Text (1,500)  
Used in: Medical Library  
UI Section: CLM Properties

Digital Publishing  
(cdn\_content\_\_v) Yes/No  
Used in: Field Medical and 5 other(s)  
UI Section: Publishing Details

# CLM Metadata Enhancements for Medical Affairs



- New Vault system templates have been updated with the following metadata changes
- We recommend that existing Vaults make the following updates to their current Vault configuration

## 1. Update field labels on existing Vaults:

Document Field	Field	Existing Value	New Value
crm_directory__v	Label	Directory	CRM Directory
crm_directory__v	Help Context	Directory in which the presentation appears	Directory folder in which the presentation appears in CRM
crm_keyword__v	Label	Keyword	CRM Searchable Keywords
crm_keyword__v	Help Context	Represents Keywords to be defined for content that is consumed in CRM	Keywords for the document that can be searched on in CRM
clm_content__v	Label	CLM Content	Publish for Veeva CRM (CLM)
crm_hidden__v	Label	Hidden	Hide from CLM Library
shareable_as_an_approved_link__v	Label	Sharable as an Approved Link	Publish for Veeva CRM (URL)
wechat_content_wec__v	Label	WeChat Content	Publish for Veeva CRM (WeChat)
engage_content__v	Label	Engage Content	Publish for Veeva CRM (Portals)
cobrowse_content__v	Label	CoBrowse Content	Publish for Veeva CRM (CoBrowse)



# CLM Metadata Enhancements for Medical Affairs



## 2. Move and Reorder the following fields to the CRM Properties display section:

- *CRM Org* (crm\_org\_\_v)
- *CRM Product* (crm\_product\_\_v)
- *CRM Product Group* (crm\_product\_group\_\_v)
- *Publish for Veeva CRM (CLM)* (clm\_content\_\_v)
- *CRM Directory* (crm\_directory\_\_v)
- *CRM Searchable Description* (crm\_searchable\_description\_v)
- *CRM Searchable Keywords* (crm\_keyword\_\_v)
- *Start Date* (crm\_start\_date\_\_v)
- *End Date* (crm\_end\_date\_\_v)
- *Training* (crm\_training\_\_v)
- *Enable Survey Overlay* (crm\_enable\_survey\_overlay\_\_v)
- *Survey* (crm\_survey\_\_v)
- *Presentation ID* (crm\_presentation\_id\_\_v)
- *Hide from CLM Library* (crm\_hidden\_\_v)
- *Publish for Veeva CRM (URL)* (shareable\_as\_an\_approved\_link\_\_v)
- *Publish for Veeva CRM (WeChat)* (wechat\_content\_wec\_\_v)
- *Searchable in WeChat* (shareable\_in\_wechat\_wec\_\_v)
- *Use China CDN* (use\_china\_cdn\_\_v)
- *Publish for Veeva CRM (Portals)* (engage\_content\_\_v)
- *Publish for Veeva CRM (CoBrowse)* (cobrowse\_content\_\_v)
- *Related Content Display Order* (crm\_related\_content\_display\_order\_\_v)
- *Website* (website\_\_v)



# CLM Metadata Enhancements for Medical Affairs



## 3. Add Document Fields to Document Types:

- Added the following fields to the Multichannel Presentation document type:
  - *CRM Org* (crm\_org\_\_v)
  - *CRM Product* (crm\_product\_\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_v)
- Added the following fields to the Multichannel Slide document type:
  - *CRM Org* (crm\_org\_\_v)
  - *CRM Product* (crm\_product\_\_v)
  - *CRM Directory* (crm\_directory\_\_v)
  - *CRM Searchable Keywords* (crm\_keyword\_\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_v)

## 4. Enable Document Fields:

- *CRM Org*
- *CRM Product*
- *CRM Searchable Keywords*
- *CRM Searchable Description*







# Document Level Rendition Type Selector for Single Doc Publishing for CLM Content

- Users can now specify the rendition type used for CRM on a per document basis
- The feature allows customer to configure a field that allows users to override the default CLM rendition behavior
- Learn more about [Single-Doc Publishing](#)

The screenshot shows the 'CLM Properties' configuration interface. It includes several sections: 'Disable Actions', 'CRM Rendition Override' (highlighted with a red box), 'Segment', and 'Custom Reaction'. The 'CRM Rendition Override' dropdown menu is open, showing the following options: RECENT, Single-slide PDF, Multi-slide Presentation, and PowerPoint Presentation.

#### CLM Rendition Options:

- Multi-slide Presentation PDF
- Multi-slide Presentation PowerPoint
- Multi-slide Presentation Word
- PowerPoint Presentation
- Single-slide PDF
- Single-slide PDF PowerPoint
- Single-slide PDF Word
- Single-slide Video



# Document Level Rendition Type Selector for Single Doc Publishing for CLM Content

- Configuration

- To Activate Field: Admin > Configuration > Document Fields > Shared Fields > Activate *CRM Rendition Override*
  - It will be used the next time the document is distributed (version change or toggling the CLM content field)

The screenshot shows the configuration page for the 'CRM Rendition Override' field. The 'Status' is set to 'ACTIVE', which is highlighted by an orange box and a callout bubble that says 'Activate CRM Rendition Override field'. Other details include: Source: Standard Field, Name: crm\_rendition\_override\_\_v, Field Type: Object, Object: CRM Rendition (crm\_rendition\_\_v), Used in: Multichannel Slide, and Help Content: Specify a different CRM Rendition Type to the default configuration for CRM. Under the 'Options' section, there are two unchecked checkboxes: 'User must always enter a value (required)' and 'Do not copy this field during Make a Copy'. The 'Display Section' is set to 'CLM Properties'.

- To Add Field to Document Type: Navigate to Document Fields > Select Document Type > Add Existing Shared Field to Document Type

The screenshot shows a list of fields available for selection in a document type configuration. The 'CRM Rendition Override' field is highlighted with an orange box and a callout bubble that says 'Add CRM Rendition Override field to Document Type of choice'. The list includes: 'CRM Media Type' (Picklist), 'CRM Rendition Override' (Object), and 'Custom Reaction' (Text). Each entry shows its name, ID, and the document types it is used in.





# Lifecycles and OneWorkflow

- OneWorkflow for Documents (fka *Multi-Document and Document Workflows*)
- OneWorkflow for Objects



# Remove Create for Legacy Workflow

- Vault will no longer support the creation or copying of legacy workflows

Document Lifecycles > Material Review & Approval

Details States Event Actions Legacy Workflows Roles Expiration eSignature Pages

Legacy Workflows ?

Label	Name	Description	Status
ANSM (early decision)	ansm_early_decision__c		Active
Approval	mlr_approval__vs		Active
Approve for Distribution	approve_for_distribution2__c	Simple state change workflow, but pushes the document through the states that auto-set the Expiration and Reapproval periods.	Active

Before 21R3, the Create button was available on 'Legacy Workflow' Tab

Create

Document Lifecycles > Material > Legacy Workflows > Send to Content Creator ?

Workflow Details

Label: Send to Content Creator  
Name: 0\_send\_to\_content\_creator\_\_c  
Description: 0. The content creator creates content for the document.  
Version: 2  
Status: Active  
Used By States: Review and Resubmit, Draft

Make a Copy  
Delete  
View Configuration History

Workflow Steps ?

Start Workflow Send to Content Creator

'Make a Copy' option was available on the Edit Workflow page

Document Lifecycles > Material Review & Approval

Details States Event Actions Legacy Workflows Roles Expiration eSignature Pages Overlay

Legacy Workflows ?

Label	Name	Description	Status
Approval	approval__c	4. Allows your approvers to apply 21 CFR Part 11 compliance on.	Active
Approve for Distribution	approve_for_distribution__c	6a_1. The material has been fully approved by your MLR team and the relevant health authority (if applicable), and is now ready for distribution. By completing this workflow, the material enters its Steady State, and is downloadable by all roles with access to this document.	Active
Cancel	cancel__c	Move the document into a soft delete state.	Active

As of 21R3, the Create button is removed from 'Legacy Workflow' Tab

Document Lifecycles > Material > Legacy Workflows > Send to Content Creator ?

Workflow Details

Label: Send to Content Creator  
Name: 0\_send\_to\_content\_creator\_\_c  
Description: 0. The content creator creates content for the document.  
Version: 2  
Status: Active  
Used By States: Review and Resubmit, Draft

Delete  
View Configuration History

Workflow Steps ?

Start Workflow Send to Content Creator

'Make a Copy' option removed from the Edit Workflow page



# Remove Create for Legacy Workflow

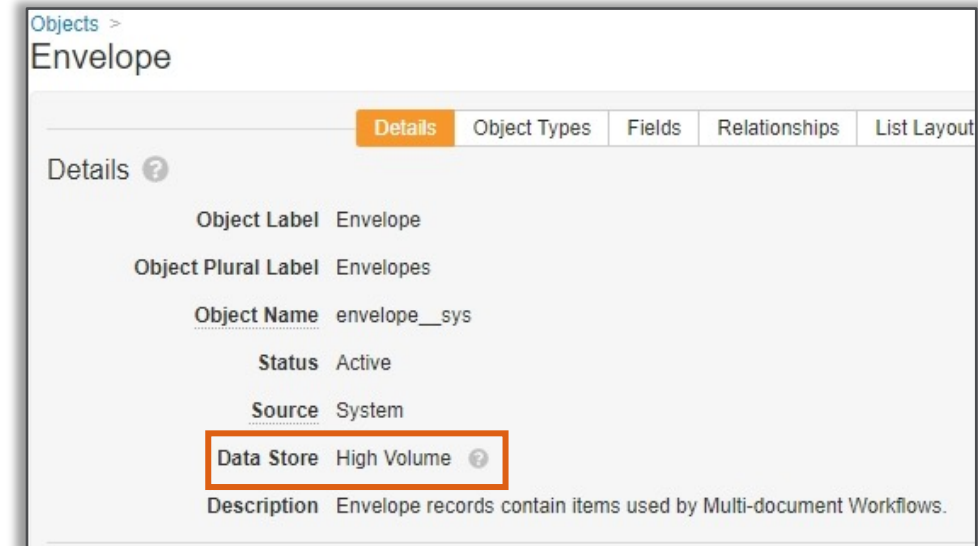


- Considerations
  - Existing legacy workflows remain supported and can be edited
  - Legacy workflows will continue to be supported in Sandbox cloning and refreshes
  - Updates to a legacy workflow using VPKs continue to work if target workflow exists in target Vault
  - New workflows should be created by navigating to: Admin > Configuration > Workflows

# Envelope Objects to High Volume Object



- Document workflows leverage *Envelope* and *Envelope Content* objects to accommodate multiple documents in a workflow
- *Envelope* objects are moving to the High Volume Object framework to provide the scalability required to support a large volume of workflows
- Considerations
  - *Envelope* records are visible to any user that has access to the document when the document is in an active workflow
    - If *Envelope* or *Envelope Content* custom object tabs have been created, carefully control access to those tabs via Tab permissions
    - Users will not be able to see new documents or take any actions they are not entitled to, but will be able to access the envelope viewer
  - High Volume Objects only support case-sensitive record filtering
  - High Volume Objects cannot be searched using the Search Bar
  - Learn more about [High Volume Objects](#)



# Read & Understood Workflows: Restrict Task Completion by Delegate Users



- Now, in OneWorkflow for Documents, delegated users are restricted from completing Read & Understood workflows on behalf of a user
  - Read & Understood task notifications are not sent to delegated users
  - This feature aligns with the behavior of the legacy Read & Understood workflows
- Considerations
  - Read & Understood Workflows are available in MedComms
  - Learn more about Working with [Read & Understood Workflows](#)



# Email Participants Action

- The 'Email Participant' action has been added to OneWorkflow on Documents and Objects

The screenshot displays the Veeva OneWorkflow interface for a document titled "Beach and Palm tree Ad - 19R3 MDFW Demo (v0.1)". The workflow is currently in the "Review" stage. A context menu is open over the "Live Review Committee Meeting" task, with the "Email Participants" option highlighted. A modal dialog titled "Email Participants" is displayed, showing a list of recipients including "Orville Mills", "C.S.M. User", and "PromoMats User". The dialog also includes a "Send a copy to myself" checkbox and "Cancel" and "Send" buttons.

Email Participant action is available in the Timeline View for documents

- Considerations
  - The 'Email Participants' action uses the same profile-level permission as legacy workflows
  - Learn more about [Document Atomic Security](#)
  - Learn more about [Configuring Object Atomic Security on Active Workflow Actions](#)







# Single Verdict: Any Lifecycle Workflow

- A single verdict can now be applied to a document workflow configured for 'Any Document Lifecycle'
  - This allows users to apply a single verdict to all documents included in the workflow

Details	
Label	Review
Name	review_committee_meeting__c
Document Lifecycle	Any document lifecycle
Workflow Type	Document
Status	Active
Description	

Before 21R3, Single Verdicts was only available for specific document lifecycles



# Single Verdict: Any Lifecycle Workflow

- Configuration

- Admin > Configuration > Workflows > [Workflow] > [Document Task] > Prompts > Prompt for Verdicts > Single Verdict: One verdict that applies to all documents
- Learn more about [Configuring Verdicts](#)

The screenshot displays the configuration interface for a 'Review' document task. It is organized into several sections:

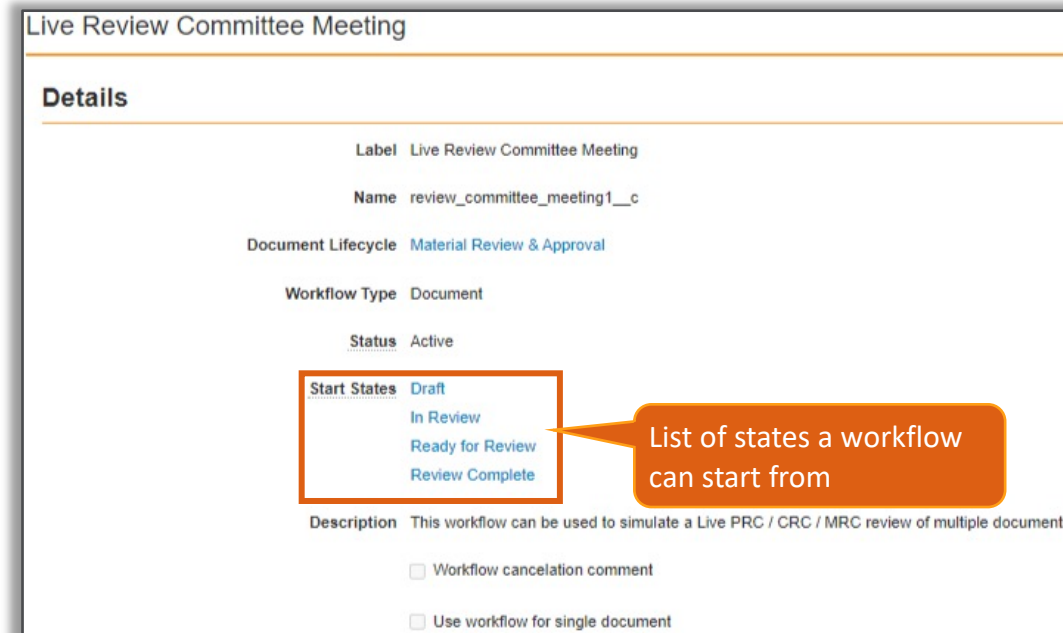
- Details:** Includes fields for Label (Review), Name (review), Type (Document Task), Description, and Next Steps (End).
- Document Task Options:** A section header.
- General Settings:** Includes Task Label (Medical Review), Assign Task To (Approver), Instructions (Review and provide comments or approval), and Task Requirement (Required).
- Due Date:** A dropdown menu for Due Date.
- Prompts:** Contains two main options:
  - Prompt for Document Fields: One field value that applies to all documents
  - Prompt for Verdicts
    - Multiple Verdicts: One verdict for each document
    - Single Verdict: One verdict that applies to all documents





# View Workflow Start States

- On a Document or Object's Workflow Details section, Admins can view a clickable list of lifecycle states from which the workflow can be started from based on user actions



- Considerations
  - Workflow start states located via: Workflows > [Object] or [Document] Workflow > Workflow Details section
  - Not applicable on 'Any Lifecycle' workflows
  - List of lifecycle states is in alphabetical order

# Ignore Non-Applicable Field in Content Action or Event Action



- Vault now ignores fields which are not part of the document type of the current document instead of generating an error based on document *Content Actions* or *Event Actions*

Start Document Workflow

You are about to send 2 documents on a document workflow. Please select a workflow to continue.

Document Workflow\*

Material

\*Required to proceed

Cancel Continue

Cart (2)

Download Empty Cart

Feature-0787 (v0.1)  
FEATURE-0787 - DRAFT  
Remove

Feature-0788 (v0.1)  
FEATURE-0788 - DRAFT  
Remove

Error

The workflow action has encountered the following errors:

Feature-0788 - Field [Audience] not valid for document type [Feature Document > Feature Slides]

OK

Vault will no longer display an error when a Content Action or Event Action does not apply to all documents within a workflow

- Considerations
  - Only applicable on OneWorkflow for Documents
  - Learn more about [Content Actions](#) and [Event Actions](#)



# Fix Actions with Missing References

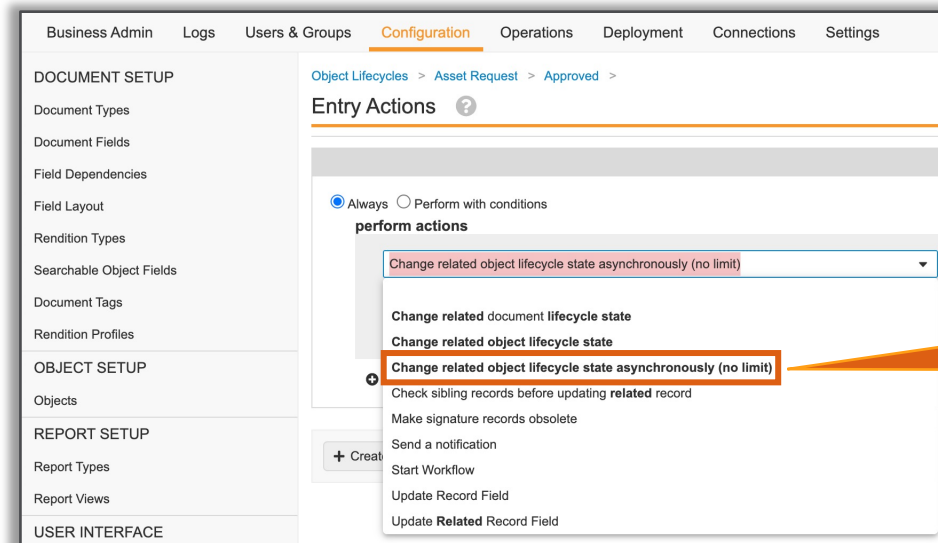


- In 21R3, *Entry actions*, *Event Actions*, *User Actions*, and *Entry Criteria* rules with missing records in a refreshed sandbox Vault can be updated with valid records by an Admin (previously completed by Veeva Services)
  - Custom objects and some standard object records are not copied if objects are not marked for cloning
- Considerations
  - The impacted rules can be updated by bringing missing object records into refreshed Vault through the API or via Vault Loader and re-referencing them where necessary
    - The impacted rules can be ignored if moving configuration back to the source
  - The missing record(s) must be re-referenced on the rule to automatically save the impacted rule
  - Learn more about [Vault API](#) and [Vault Loader](#)

# Asynchronous Related Object Change State Entry Action



- New change state entry action for object lifecycles that can update an unlimited number of related records
  - The related object record state changes occur asynchronously
- Considerations
  - This should be only used for objects with a large number (1,000+) of related records
  - The existing entry action ‘Change related object lifecycle state’ will continue to work synchronously and has a limit of updating 1,000 records
  - Learn more about [Configuring Object Workflows](#)



Select the asynchronous option to optimize performance of updates of high volume of related objects





# Workflow Version History

- Admins can now use the new 'View Workflows Versions' action available on Document and Object's Workflow Details page to display a workflow's version history
  - This feature provides Admins with greater transparency of the number of active workflows running on prior versions of the workflow

The screenshot shows the 'Approval' workflow details page. A context menu is open over the 'View Workflow Versions' action. The 'Workflow Versions' dialog is displayed, showing a table of workflow versions. An orange callout points to the 'View Workflow Versions' action, stating: "Workflow Versions' dialog displays all activated versions of a workflow". Another orange callout points to version 10 in the table, stating: "Click a previous version of the workflow to view its details and steps".

Version	Last Modified	Last Modified By	Status	Current Active Instances
11	7/9/2021 9:15 AM EDT	csm@usc8.com	Active	2
10	9/16/2020 2:26 PM EDT	csm@usc8.com	Inactive	1
9	2/14/2020 12:57 PM EST	csm@usc8.com	Inactive	0
8	7/12/2019 5:42 PM EDT	csm@usc8.com	Inactive	0
7	7/12/2019 5:31 PM EDT	csm@usc8.com	Inactive	0
6	7/12/2019 5:24 PM EDT	csm@usc8.com	Inactive	0
5	7/12/2019 5:08 PM EDT	csm@usc8.com	Inactive	0
4	7/12/2019 5:42 PM EDT	csm@usc8.com	Inactive	0
3	7/12/2019 5:31 PM EDT	csm@usc8.com	Inactive	0
2	7/12/2019 5:24 PM EDT	csm@usc8.com	Inactive	0
1	7/12/2019 5:08 PM EDT	csm@usc8.com	Inactive	0



# Workflow Version History

- Considerations
  - Previous workflow versions cannot be edited
  - Deleted fields or states are not displayed on a previous workflow version
  - Cannot make a copy of or restore an older version
  - Learn more about [Workflow Version History](#)

The screenshot displays the 'Approval' workflow details page. The 'Version 4 Latest Version' link is highlighted with a red box. A callout box points to this link with the text: 'When viewing an inactive version, select 'Latest Version' to revert to active version'. The interface also shows other details such as 'Label: Approval', 'Name: material\_approval\_sdw\_\_c', 'Document Lifecycle: Material', 'Workflow Type: Document', 'Status: Inactive', and 'Start States: Ready for Review, Review Complete'.



# Support Reference Constraints in Workflows



- Reference Constraints are now supported on Document Workflows
  - Reference Constraints on object reference fields restrict the list of valid records that a user can select. You can configure static or dynamic reference constraints on object reference fields using a VQL-type expression
- Considerations
  - Both the controlling and controlled fields should be part of the field prompts in the verdict or task completion dialog. Having only a controlled field can cause Vault to display errors if invalid values are selected
- Configuration
  - Learn more about [Reference Constraints](#)
  - Learn more about criteria VQL in the [Developer Portal](#)



# Support for Today("user") Function

- Today("user") function has been enhanced to return the date for the initiating user's time zone when used in a formula field expression
  - This function applies to:
    - Document and Object Lifecycle Event Action and Entry Action
    - Document Workflow Start Step Rule or Content Action Update Fields step
  - Previously, the Today("user") returned the System date / time zone
  - This feature allows organizations to capture critical date / time information in the user's appropriate time zone
  - Learn more about [Today\("user"\) Function](#)

Update document fields for Lifecycle Event Actions and Workflow Update Fields

The screenshot shows a configuration window for a workflow action. At the top, there are radio buttons for 'Always' (selected) and 'Perform with conditions'. Below this is the section 'perform actions'. The first dropdown menu is set to 'Update document field'. Under 'Fields\*', the dropdown is set to 'Planned Date of First Use'. Under 'Set to value\*', the text box contains the formula 'Today("user") +Days(45)' with a calendar icon to its right.

Set field using formula for Lifecycle Entry Actions

The screenshot shows a configuration window for a workflow action. At the top, there are radio buttons for 'Always' (selected) and 'Perform with conditions'. Below this is the section 'perform actions'. The first dropdown menu is set to 'Set field using formula'. Underneath, there are two dropdown menus: the first is set to 'Approved for Distribution Date' and the second is set to 'Today("user")' with a calendar icon to its right.

# Support for Today("user") Function



- Configuration – Entry Actions

- Admin > Configuration > Document Lifecycle > [Lifecycle] > [State] > Entry Action > Edit

Always  Perform with conditions

**perform actions**

Set field using formula

Approved for Distribution Date

Today("user")

- Configuration – Event Actions

- Admin > Configuration > Document Lifecycle > [Lifecycle] > Event Actions > [Create Document/Draft/Copy] > Edit

Always  Perform with conditions

**perform actions**

Update document field

Fields\*

Planned Date of First Use

Set to value\*

Today("user") + Days(45)

- Configuration - Workflow Update Fields

- Admin > Configuration > Workflows > [Workflow] > Edit Start Step > Create Start Step Rule
- Admin > Configuration > Workflows > [Workflow] > [Content Action Step]

CS: In Review

**Details**

Label\* CS: In Review

Name\* cs\_in\_review

Type\* Content Action

Description

Next Steps Medical Review Legal Review Regulatory Review

**Rules**

Rule 1

Always  Perform with conditions

**perform actions**

Update document field

Fields\*

Expiration Date

Set to value\*

Today("user") + Years(1)



# Set Reference Field to Blank

- Reference fields can be set to blank using a null expression in an entry action, event action, and workflow update fields
  - Available for Document and Object Lifecycles and OneWorkflow on Documents and Objects

Update document fields for Lifecycle Event Actions and Workflow Update Fields

A screenshot of a configuration window titled 'Update document field'. It features a dropdown menu at the top with 'Update document field' selected. Below this, there is a section labeled 'Fields\*' with a dropdown menu showing 'Country'. Underneath, there is a section labeled 'Set to value\*' with a text input field containing the word 'null' and a small calculator icon to its right.

Set field using formula for Lifecycle Entry Actions

A screenshot of a configuration window titled 'Set field using formula'. It features a dropdown menu at the top with 'Set field using formula' selected. Below this, there is a section labeled 'Fields\*' with a dropdown menu showing 'Country'. To the right of this, there is a text input field containing the word 'null' and a small calculator icon to its right.

- This feature could be useful if a field needs to be set to blank as a result of:
  - Records/Documents being rejected (return to previous state)
  - Records/Document copied



# Set Reference Field to Blank

- Configuration – Entry Actions

- Admin > Configuration > Document Lifecycle > [Lifecycle] > [State] > Entry Action > Edit

Entry Actions

Details | User Actions | Security Settings | Entry Criteria | **Entry Actions** | Atomic Security

Cancel Save

Always  Perform with conditions

perform actions

Set field using formula

Country null

- Configuration – Event Actions

- Admin > Configuration > Document Lifecycle > [Lifecycle] > Event Actions > [Create Document/Draft/Copy] > Edit

Document Lifecycles > Material Review & Approval > Event Actions > Create Copy

Cancel Save

Always  Perform with conditions

perform actions

Update document field

Fields\*

Country

Set to value\*

Null

- Configuration - Workflow Update Fields

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

Update Field

Details

Label\* Update Field

Name\* update\_field

Type\* Content Action

Description

Next Steps CS: In Review Meeting

Rules

Rule 1

Always  Perform with conditions

perform actions

Update document field

Fields\*

Country

Set to value\*

null



# Update Task Due Date on Object Date Field Update



- Admins can configure active task due dates to automatically update based on changes to an associated object record date field
  - A new checkbox labeled *'Update Active Task Due Date when Date Field is Updated'* is added within the Due Date section of a Task step and only appears when task due date is based on a record date field

Review & Approval

---

**Workflow Task Options**

---

**General Settings**

Task Label\* Provide review/approval for this claim

Assign Task To\* Approver(s)

Assign to all users in participant group  
 Make available to users in participant group

Instructions\* You have been requested to provide your approval for this claim. Review the claim, then click the complete button for this task to enter your verdict.

Task Requirement\* Required

Do not allow workflow owner to receive this task

**Due Date**

Due Date Approved Date + 0 Days

Update active task due date when date field is updated

# Update Task Due Date on Object Date Field Update



- Considerations

- Default setting is OFF
- The *Update Task Due Date* action is unavailable when task due dates are configured to be updated automatically
- Update Task Due Date option is not available for Workflow Start Date or Task Creation Date
- Only applicable on OneWorkflow for Objects

- Configuration

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

**Due Date**

Due Date Approved Date + 0 Days

Update active task due date when date field is updated

*Enable Update Active Task Due Date When Date Field Is Updated*



# Start Step Rule: Required Controls

- Admins can now configure Document and Object workflow Start Step Rules to require an otherwise optional control
  - On the Start Step Rule, a new dropdown menu labeled *Select Rule Type* is available, where Admins can select values of 'Required' or 'Hidden' for a Participants, Fields, or Variables control

Control 3: Participants

Participant Label Medical Approvers

Add Participants  Allow workflow initiator to select participants

Role allowed to participate Medical

Allow task initiator to participate

Required

Default users from sharing settings

Use role as participants

Workflows > Approval and Rejection WF > Start >

Start Step Rule ?

Rule Label\*

Select Rule Type\*

Hidden

Required

Approver Field Prompt

If this expression is True\*







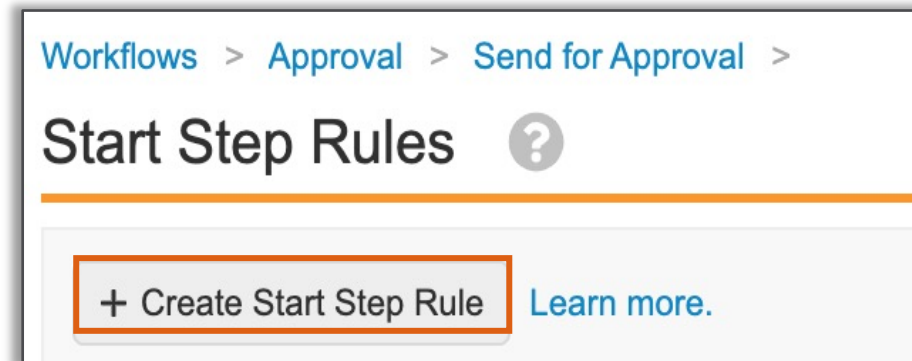
# Start Step Rule: Required Controls

- Considerations

- All existing Start Step Rules will have value of 'hidden'
- Learn more about [Object Workflows Start Step Rules](#)
- Learn more about [Document Workflows Start Step Rules](#)

- Configuration

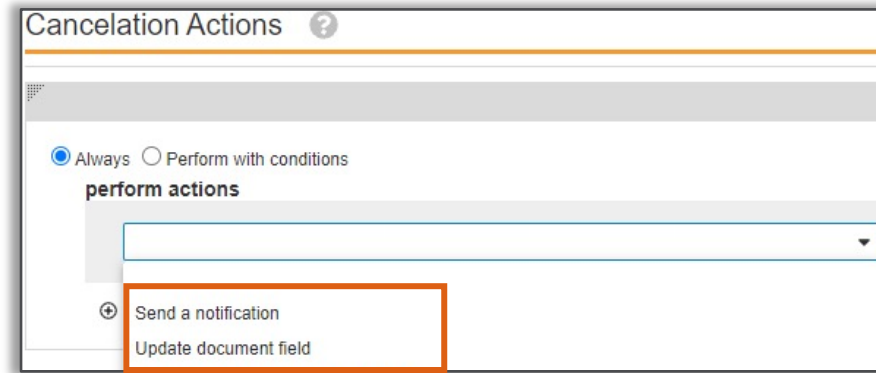
- Admin > Configuration > Workflows > [Document] or [Object] Workflow > Workflow's Start Step > Start Step Rule > Edit > [Create Start Step Rule]





# Workflow Cancellation Actions

- Admins can now configure cancellation actions to Send a Notification or Update Document Fields

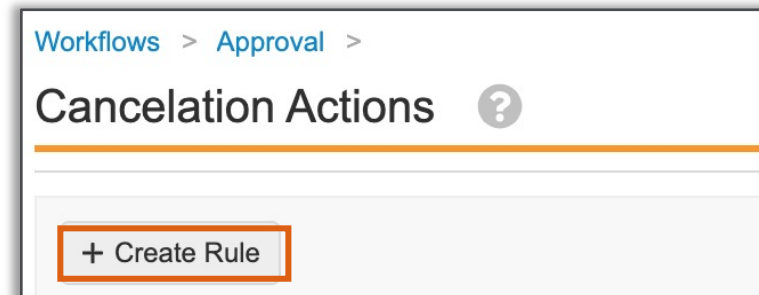


- Considerations

- Available on OneWorkflow for Documents and OneWorkflow for Objects
- Maximum of 25 cancellation actions can be configured per workflow
- SDK can be utilized to add custom system actions
- Learn more about [Document Cancellation Actions](#) and [Object Cancellation Actions](#)

- Configuration

- Admin > Configuration > Workflows > [Workflow] > [Edit Cancellation Actions] > *Create Rule*





# Workflow Cancellation Comment

- Admins can now require that a user provides a comment upon cancellation of a Document or Object workflow
  - Organizations can use this feature to increase overall compliance for auditing purposes

Character limit of 500 for cancellation comments

Workflow Cancellation Comment\*

Canceling due to changed priorities.

36/500

\*Required to proceed

Cancel Cancel Workflow

Voderal Pain Relief Print Piece (v0.1) Review Complete

Pre-Approval In Review and Approval Proofing and Compliance Submission to Health Authority Approved for Distribution

ACTION	DETAILS
Review Complete	<p>(v0.1) Approval</p> <p>Noor Noush</p> <p>Cancelled: 10/11/2021 9:42 AM CDT</p> <p><a href="#">View Workflow History Report</a></p> <p>Comment: Canceling due to changed priorities.</p>
Review Complete	<p>(v0.1) Approval</p> <p>Cancelled: 10/11/2021 9:40 AM CDT</p> <p>0 Complete Tasks of 1 Tasks</p>
Review Complete	<p>(v0.1) Review</p> <p>Completed: 10/11/2021 9:39 AM CDT</p> <p>2 Complete Tasks of 2 Tasks</p>
Draft	<p>(v0.1) Review</p> <p>Cancelled: 10/11/2021 9:38 AM CDT</p> <p>0 Complete Tasks of 1 Tasks</p>

Workflow Cancellation Comment shown in workflow timeline for audit purposes





# Workflow Cancellation Comment

- Configuration

- Admin > Configuration > Workflows > [Document or Object Workflow] > Edit Workflow Details

### Details

**Label** Approval and Rejection WF

**Name** approval\_and\_rejection\_wf\_\_c

**Document Lifecycle** [General Lifecycle](#)

**Workflow Type** Document

**Status** **Editing** [Make configuration active](#)

**Description**

Use workflow for single document

Workflow cancellation comment

### Workflow Steps

Enable 'Workflow Cancellation Comment'



# Set Tokens in Instructions

- Tokens can now be configured in instructions of Start and Task steps in Document and Object workflows
  - Document Workflows only support Document Name and Document Number tokens (21R3)
    - Tokens only displayed when workflow contains one document. If there is more than one document, tokens will resolve to NULL
  - Object Workflows only support Object field name tokens (21R3)
    - If user does not have access to a field value, the field does not exist, or the field is empty, token will resolve to NULL
- Considerations
  - No tokens supported for Task Label
- Configuration
  - Admin > Configuration > Workflows > [Object] or [Document] Workflow > Start Step or Task Step > Instructions > Edit to add tokens of choice

**Start Options** ?

Control 1 Instructions

**Instructions\*** Please review the medical accuracy of the \${docName} \${docNumber}

Document Workflow Start Step Instructions with tokens

**Workflow Task Options**

**General Settings**

**Task Label\*** Provide review/approval for this claim

**Assign Task To\*** Approver(s)

Assign to all users in participant group

Make available to users in participant group

**Instructions\*** You have been requested to provide your approval for this \${Object.product\_\_v} claim. Review the claim, then click the complete button for this task to enter your verdict.

Object Workflow Task Step Instructions with token



# Set Tokens in Instructions

- This feature also adds 'no-link' tokens for notification object message templates
  - ``${workflowContentsNoLink}`` token displays document name(s) in subject, with comma separated values for multiple documents
  - ``${workflowTargetNoLink}`` token displays workflow name in notification subject

The ``${workflowContentsNoLink}`` token will remove the HTML tags from the listed document name



This is a reminder that the task "Please provide your Medical Review" has not yet been completed for

``${workflowTargetNoLink}`` "Review of Multiple Docs -

10/4/2021". The content included in this task are:

- [Verteo Website](#)
- [Veeva Material Advertisement](#)

The ``${workflowTargetNoLink}`` token will remove the HTML tags from the workflow name

## • Considerations

- The ``${multiDocDocumentsList}`` token is being replaced with ``${workflowContentsNoLink}``
- The ``${multiDocWorkflowLink}`` token is being replaced with ``${workflowTargetNoLink}``
- ``${multiDocDocumentsList}`` and ``${multiDocWorkflowLink}`` tokens are no longer available for selection in the subject of notification messages
  - Existing messages using these tokens will continue to work





# Set Tokens in Instructions

- Configuration
  - Admin > Configuration > Object Messages > [Notification] Message > Edit > Subject

Object Messages > MDW Task Reminder Notification ?

Details

**Label\*** MDW Task Reminder Notification

**Name\*** mdwtaskremindernotification \_c

**Status\*** Active ▼

**Object\*** All objects

**Source** ↶ Custom

**Description** Created to support the Task Reminder Notification functionality, set up within User Task workflow steps for MDW

---

Message Text

**Subject\*** Task Reminder: `#{workflowContentsNoLink}` for `#{Object.n`

**Notification Text\*** This is a reminder that the task "`#{taskName}`" has not yet been completed for: "`#{multiDocWorkflowLink}`". The content included in this task are:  
Some text formatting with HTML tags is permitted. [Learn more.](#)

**Email Body\*** `<p>#{recipientName}</p>` `<p>#{notificationMessage}</p>` `<p><b>Task Due Date:</b> #{taskDueDate}</p>` `<p>Access your Vault here: <a`

New NoLink token added in subject of Object Notification Message





Resources



# Resources

- Contact your Customer Success Manager or Managed Services Consultant
- Email: [VaultCustomerSuccess@veeva.com](mailto:VaultCustomerSuccess@veeva.com)
- 21R3 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/>





Thank you



Action UI

# Action User Interface (UI) Hub

- The Action UI Hub includes the most up to date information about Action UI:
  - Action UI Demo
  - Frequently Asked Questions
  - Timelines for implementation
  - Education materials for download
  
- Access the site at:  
[go.veeva.com/21R2-ActionUI](https://go.veeva.com/21R2-ActionUI)



# Action UI Highlights

The screenshot displays the Vault Action UI interface. The top header is dark blue with the Vault logo on the left and navigation elements on the right. A search bar is located in the top center. Below the header is a navigation bar with tabs for Home, Library, Reports, Dashboards, Loader, and Products. The main content area shows a document titled "VZD 2.7.3 (v1.0)" with an "Approved" status. A progress bar below the document title indicates the stages: Draft, Authoring, Review, and Approved. The document content is displayed in a table format, with a "TABLE OF CONTENTS" section. On the right side, there is an "INFORMATION" panel with details about the document, including Name, Title, Type, Document Number, Created By, Last Modified By, Version, Lifecycle, and Status. A vertical toolbar on the right side of the document content area contains various icons for document management. Callouts with orange boxes and arrows point to specific UI elements: "Updated Header" points to the top navigation bar; "Notification Badge" points to a bell icon in the top right; "New Action Bar" points to a set of icons above the document content; "Updated Action Menu" points to a three-dot menu icon; and "Document Toolbars" points to the toolbar on the right side of the document content area.

Updated Header

Notification Badge

New Action Bar

Updated Action Menu

Document Toolbars



# Logging in with Action UI

- Login screens and *My Vaults* home pages (if enabled) are unaffected by Action UI updates
- If multiple Vaults are available, they will now appear in alphabetical order

The screenshot displays the 'My Vaults' interface in the Vault application. At the top, there is a search bar labeled 'Search all vaults ...' and a 'View My Vaults' button with a globe icon. Below the search bar, the page title 'My Vaults' is shown, followed by filters for 'All My Vaults' and 'Vault Name'. The main content area contains two vault cards, each with a 'My Tasks' gauge showing '0 Available tasks' and '0 Active workflows'. The first card is for 'Action UI RIM Sandbox (mdltest.com)' and the second is for 'Regulatory (actionui.com)'. A callout menu is open for the 'View My Vaults' button, showing a list of vaults in alphabetical order: 'Action UI RIM Sandbox (mdltest.com)' and 'Regulatory (actionui.com)'. The page number '1-2 of 2' is visible in the top right corner.



# Updated Header and Banners

- Banner colors that distinguish between Production and Sandbox environments have been updated

## Production Vault Header

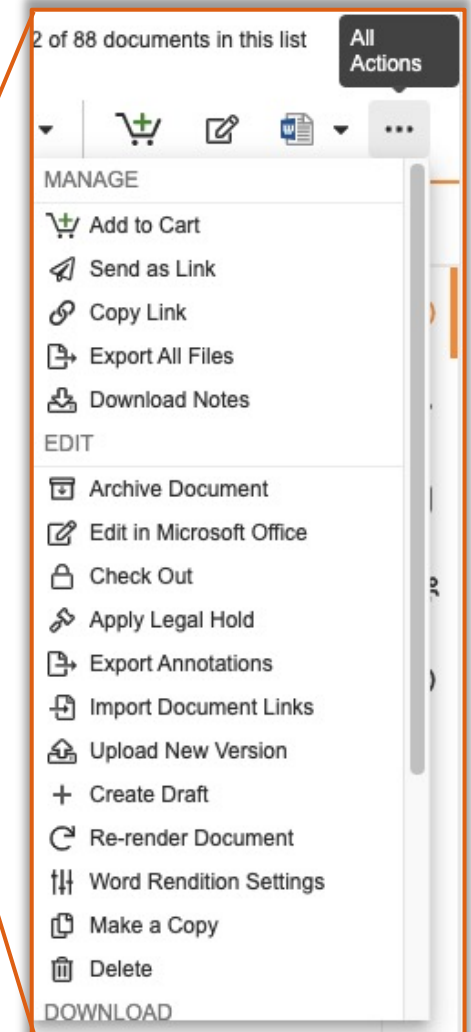
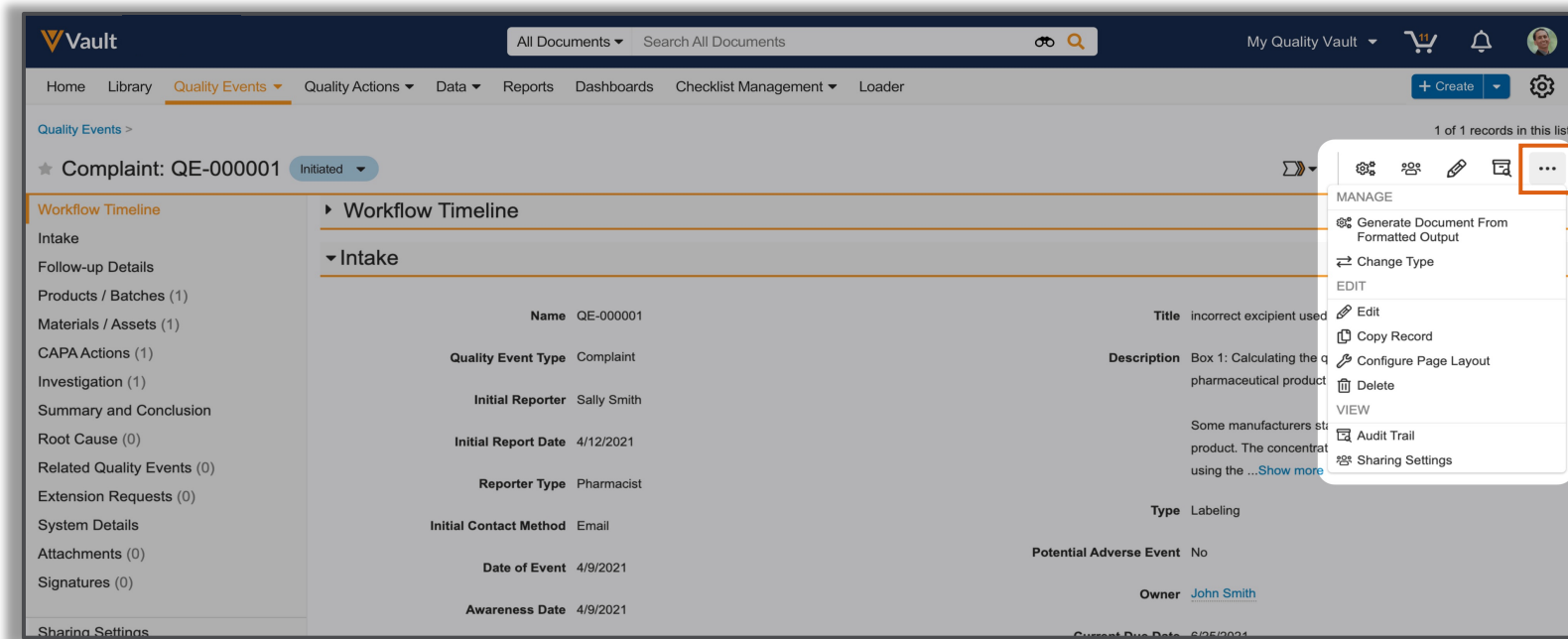


## Sandbox Vault Header



# Actions Menu - Ellipsis

- The document **All Actions** menu is available on the far right of the Action Bar, via the ellipsis icon
- This menu displays all actions you have available for the selected document or record, including **Send as Link**, **Where Used**, and **Version History**
- Available items in the **All Actions** menu vary by Vault configuration, lifecycle state, *Create* permissions, your license type, your security profile, and your role-based permissions on the document or record





# Object Record Overview

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

The screenshot displays the Vault interface for the 'Product: Cholecap' record. The top navigation bar includes the Vault logo, a search bar for 'Products', and utility icons for 'Action UI', a shopping cart, a notification bell, and a user profile. Below the navigation bar, the 'Products' section is active, showing a breadcrumb 'Products >' and a star icon next to 'Product: Cholecap'. A 'Market' dropdown menu is highlighted with a callout 'State Change Dropdown'. To the right, a 'Workflow and State Change Menu' icon is also highlighted. The main content area is divided into a 'Details' panel on the left and a 'Details' table on the right. The 'Details' table contains the following information:

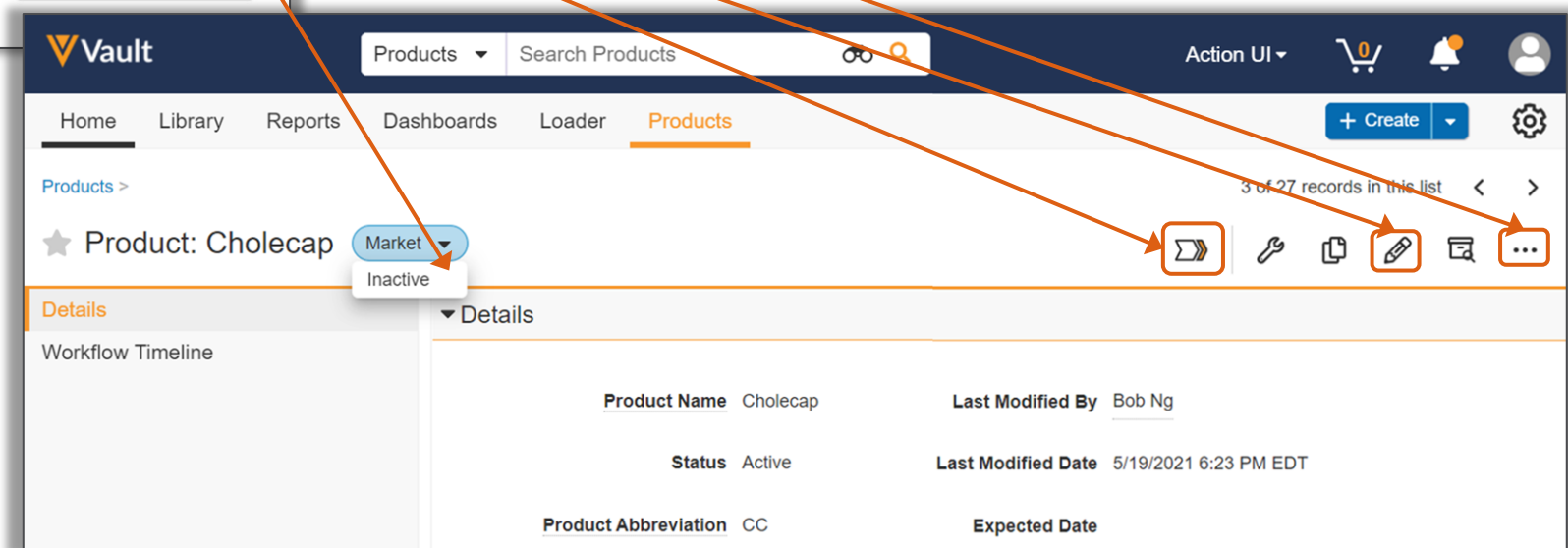
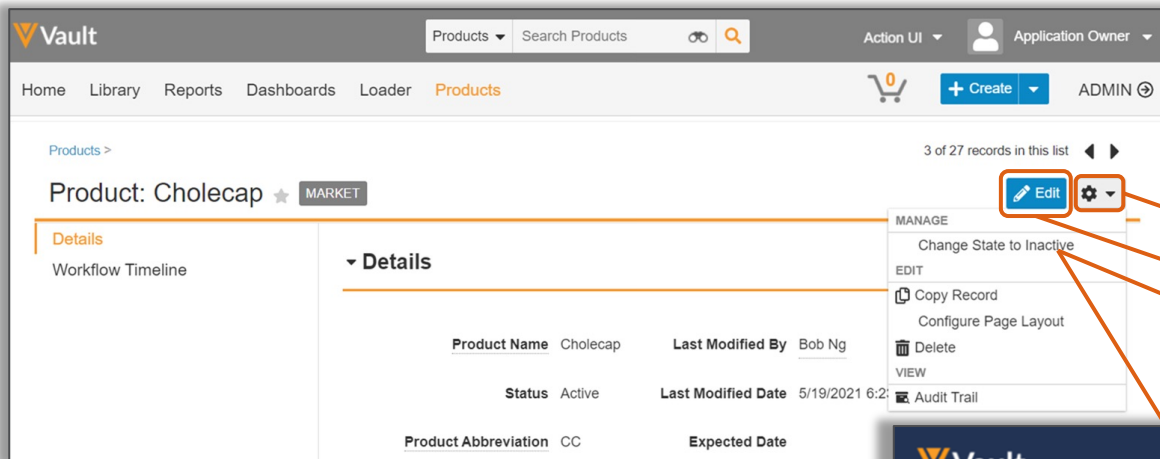
<b>Product Name</b>	Cholecap	<b>Last Modified By</b>	Bob Ng
<b>Status</b>	Active	<b>Last Modified Date</b>	5/19/2021 6:23 PM EDT
<b>Product Abbreviation</b>	CC	<b>Expected Date</b>	

The action bar at the bottom right of the main content area contains several icons: a key, a document, a pencil, a speech bubble, and a three-dot menu. The three-dot menu is highlighted with a callout 'All Available Object Actions'. The key icon is highlighted with a callout 'Most Frequently Used Object Actions'.



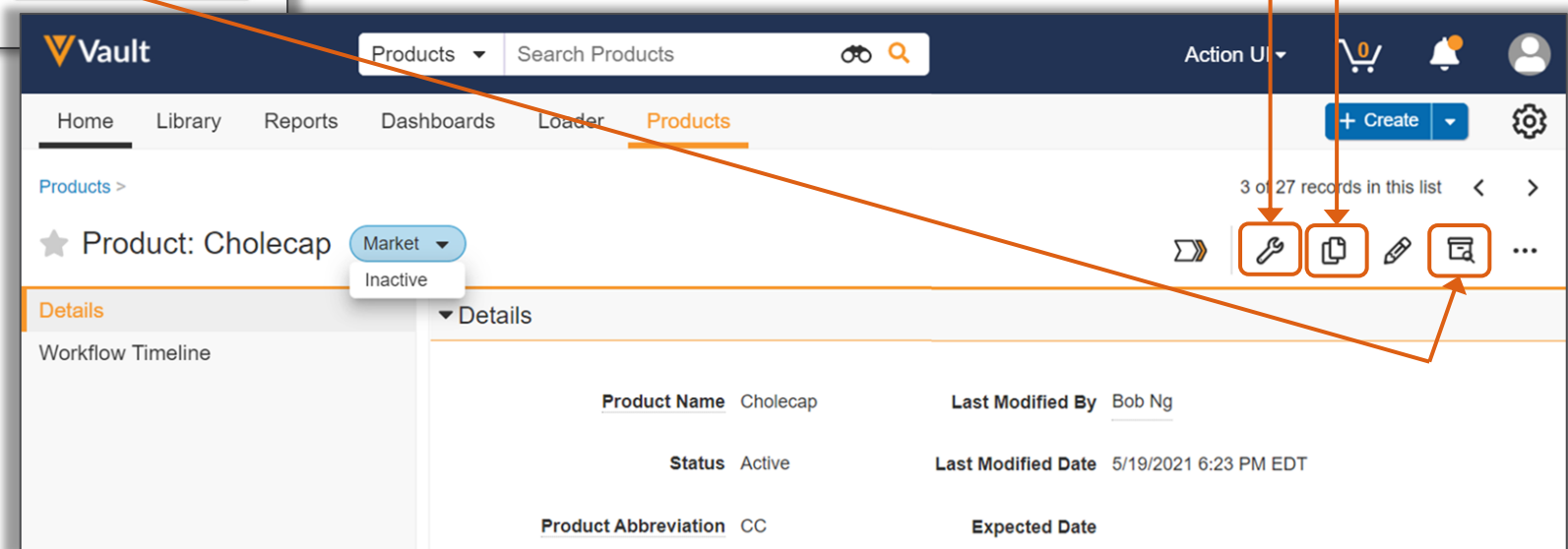
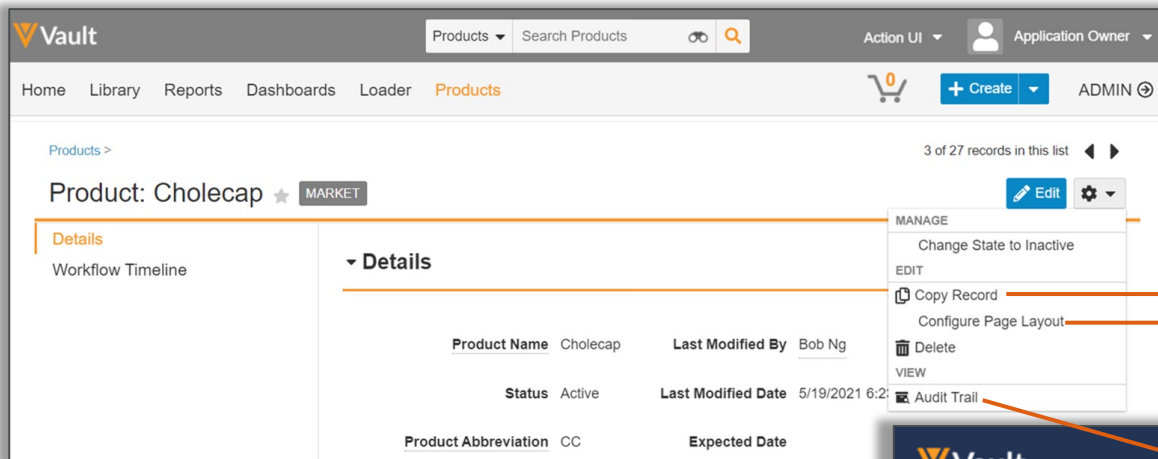
# Record Action Bar

- The most common actions appear in the new Action Bar
- State changes can be completed from the Workflow Menu or State Change Dropdown



# Record Action Bar

- All previously available actions appear in the Action Bar or under the All Actions menu
- All icons have hover help text to identify the action



# Library Overview

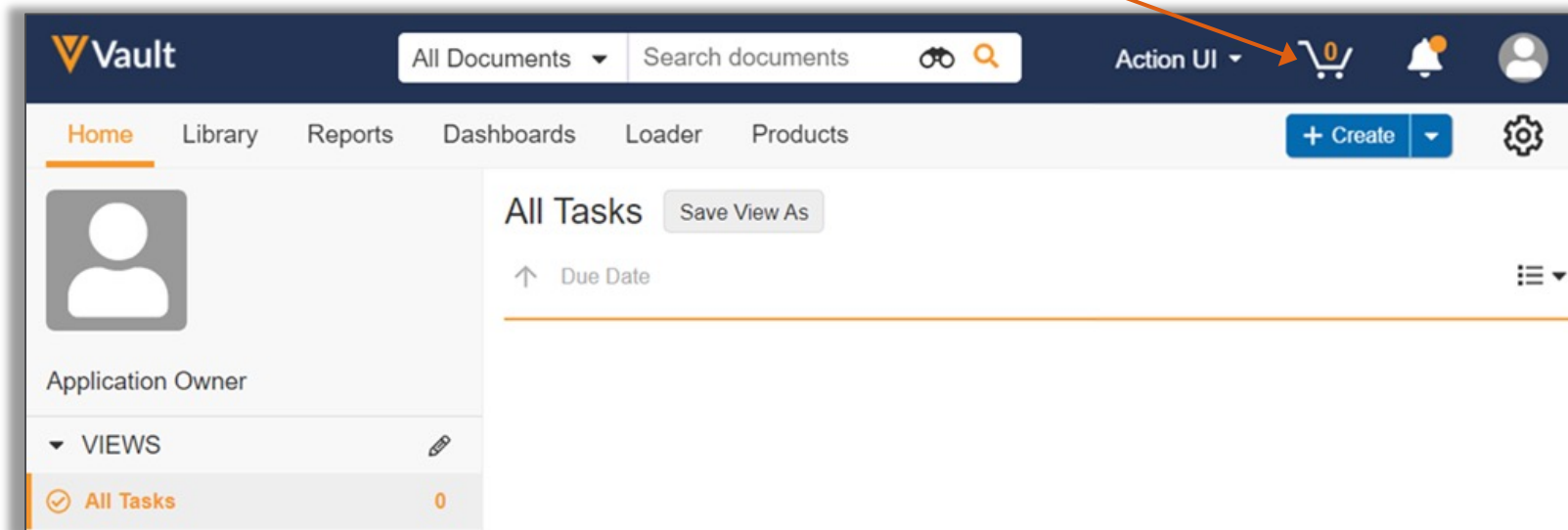
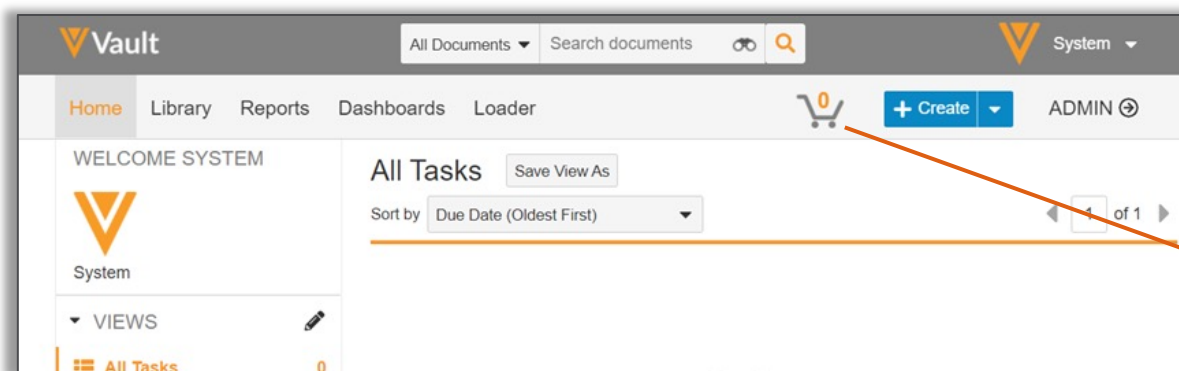
- Bulk actions can be accessed from the All Actions menu icon (ellipsis)
- Library views can be selected from the new Action Bar

The screenshot displays the Vault Library interface. The top navigation bar includes 'Home', 'Library' (active), 'Reports', 'Dashboards', 'Loader', and 'Products'. A search bar is present with 'All Documents' selected. The left sidebar contains 'VIEWS' (All Documents, Recent Documents, My Documents, Favorites, Document Inbox) and 'FILTERS' (DOCUMENT TYPES: All, General Documents, Undefined; PRODUCT: All, Cholecap, undefined). The main content area shows a list of documents under 'All Documents' view, sorted by 'Modified Date'. Three documents are listed: 'Alcohol Fact Sheet (v0.1)', 'USFDA Regulatory Toxicology Overview (v0.1)', and 'Vault Design Doc - Admin App Page (1) (v0.1)'. Two callouts are present: one at the top right showing a bulk action menu with 'PERFORM BULK ACTION' and 'All 3 Documents'; another at the bottom right showing a view selection menu with options 'Detail', 'Thumbnail', 'Compact' (selected), and 'Grid'.



# Library Overview

- The document cart has moved to the banner at the top of the screen



# 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 Vault interface for document 'VZD 2.7.3 (v1.0)'. The document is in the 'Approved' state, as indicated by the blue bar at the top of the document content area. The document content includes a 'TABLE OF CONTENTS' section with the following entries:

Section	Page
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

The 'INFORMATION' pane on the right displays the following details:

- Name:** VZD 2.7.3
- Title:**
- Type:** General Documents
- Reclassify:** (link)
- Document Number:** VV-00004
- Created By:** Mary Anne Potok on 6/11/2021 10:48 AM EDT
- Last Modified By:** System on 6/17/2021 7:46 PM EDT
- Version:** 1.0
- Lifecycle:** General Lifecycle
- Status:** Approved

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



# Document Information

- Actions to control the Doc Info Panel will move to the right side of the page

The image illustrates the transition of document information controls. On the left, a sidebar contains an 'INFORMATION' panel with sections for General, File Info, Product Information, Datasheet (0), Linked Documents (0), Source References (0), Supporting Documents (0), Translation (0), Renditions (1), and Sharing Settings. On the right, a document detail view shows the 'INFORMATION' panel with fields for Name (VZD 2.7.3), Title, Type (General Documents), Document Number (VV-00004), Created By (Mary Anne Potok), Last Modified By (System), Version (1.0), Lifecycle (General Lifecycle), and Status (Approved). A vertical bar between the two panels contains icons for Information, Relationships, Files, Sharing Settings, and Timeline View. Arrows indicate the movement of these controls from the left sidebar to the right side of the page.

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



# Document Information

- Actions to control the Doc Info Panel will move to the right side of the page

The image shows two views of a document information panel. The left view shows a compact panel with an 'Edit Fields' button. The right view shows an expanded panel with a vertical toolbar on the right side. Orange arrows indicate the movement of controls from the left view to the right view.

**Left View (Compact Panel):**

- Shopping cart icon with '4' items
- + Create button
- ADMIN link
- 25 of 111 documents in this list
- Navigation icons: list view, grid view, refresh, shopping cart, document, settings
- INFORMATION panel header
- General and File Info sections
- Edit Fields button

**Right View (Expanded Panel):**

- Action UI dropdown
- Shopping cart icon with '0' items
- Notification bell icon
- User profile icon
- + Create button
- Settings gear icon
- 1 of 4 documents in this list
- Navigation icons: list view, shopping cart, edit, document, settings
- view button
- Approved status bar
- INFORMATION panel header
- General section
- Document details: Name (VZD 2.7.3), Title, Type (General Documents), Document Number (VV-00004), Created By (Mary Anne Potok), Last Modified By (System), Version (1.0), Lifecycle (General Lifecycle), Status (Approved)
- Vertical toolbar on the right:

**Vertical Toolbar Actions:**

- Information (i icon): Click to expand/collapse or remove pane from view
- Relationships (link icon)
- Files (document icon)
- Sharing Settings (people icon)
- Timeline View (clock icon)



# Collaborative Authoring

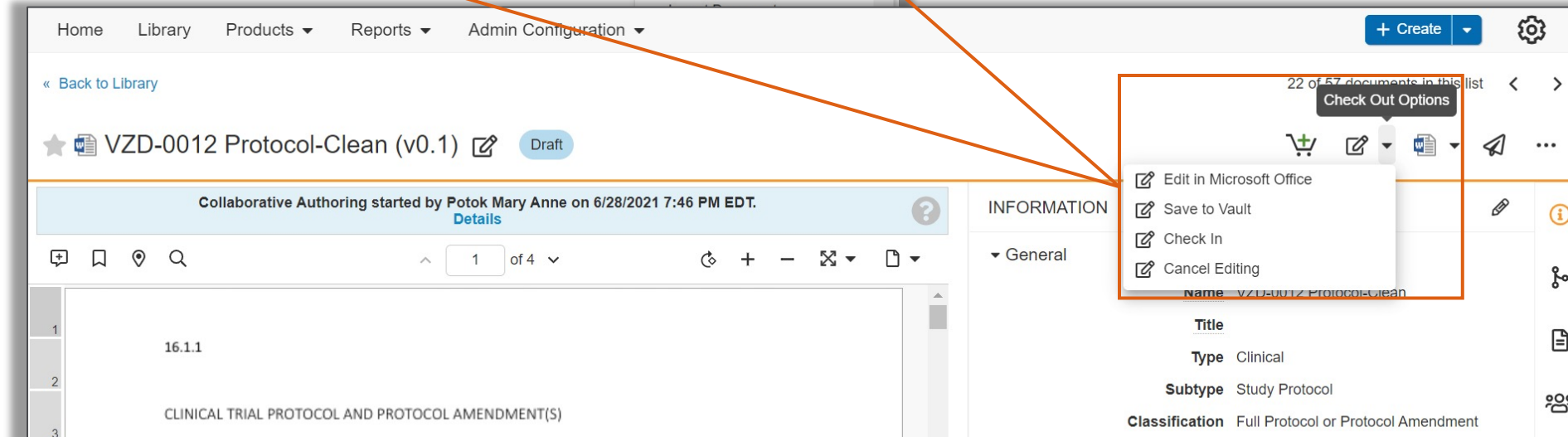
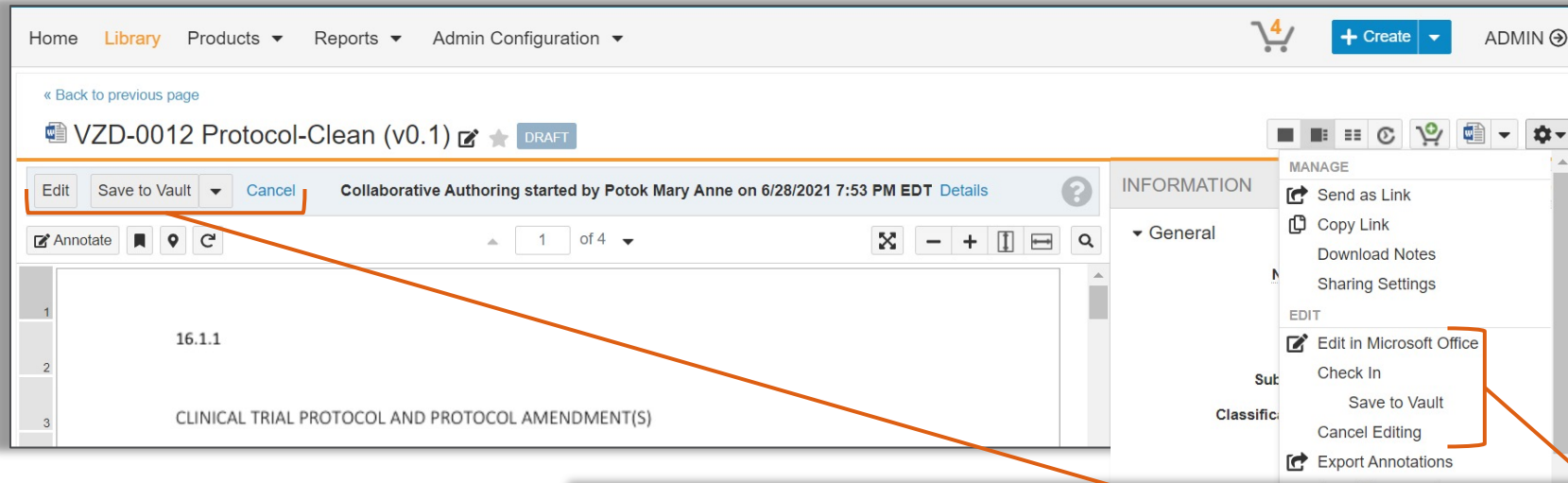
- Collaborative Authoring has its own dedicated menu
- The 'Edit in Microsoft Office' action is available in the Actions menu, and will be featured in the Action Bar if it is a frequently used action

The image displays two screenshots of the Veeva system interface, illustrating the 'Edit in Microsoft Office' action. The top screenshot shows a document titled 'VZD-0012 Protocol-Clean (v0.1)' in a 'DRAFT' state. An orange box highlights the 'Edit' button in the top right corner of the document view. The bottom screenshot shows the same document in a 'Draft' state, with an orange box highlighting the 'Edit in Microsoft Office' button in the top right corner of the document view. An orange arrow points from the 'Edit' button in the top screenshot to the 'Edit in Microsoft Office' button in the bottom screenshot. The interface includes a navigation bar with 'Home', 'Library', 'Products', 'Reports', and 'Admin Configuration'. The document content includes sections like '16.1.1' and 'CLINICAL TRIAL PROTOCOL AND PROTOCOL AMENDMENT(S)'. The right sidebar shows document metadata such as Name, Title, Type, Subtype, Classification, Document Number, Document Batch, and Created By.



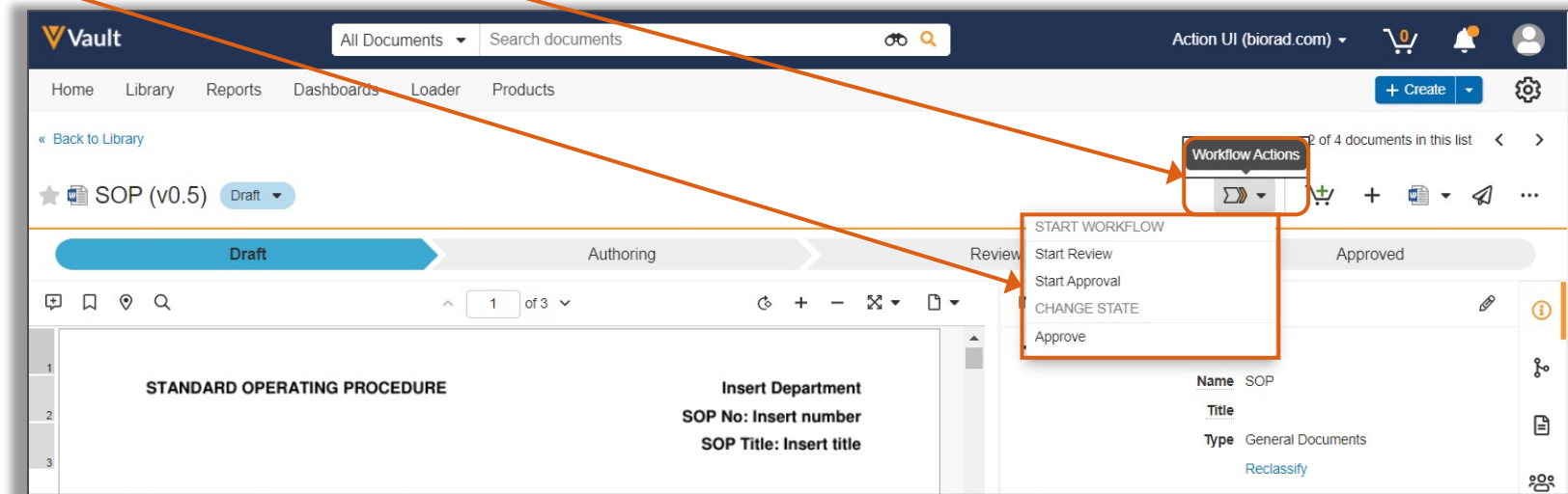
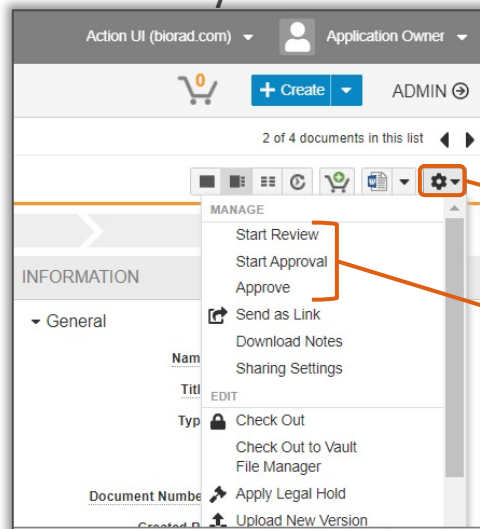
# Collaborative Authoring

- 'Edit' and all actions for editing in Microsoft Word are now co-located



# 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



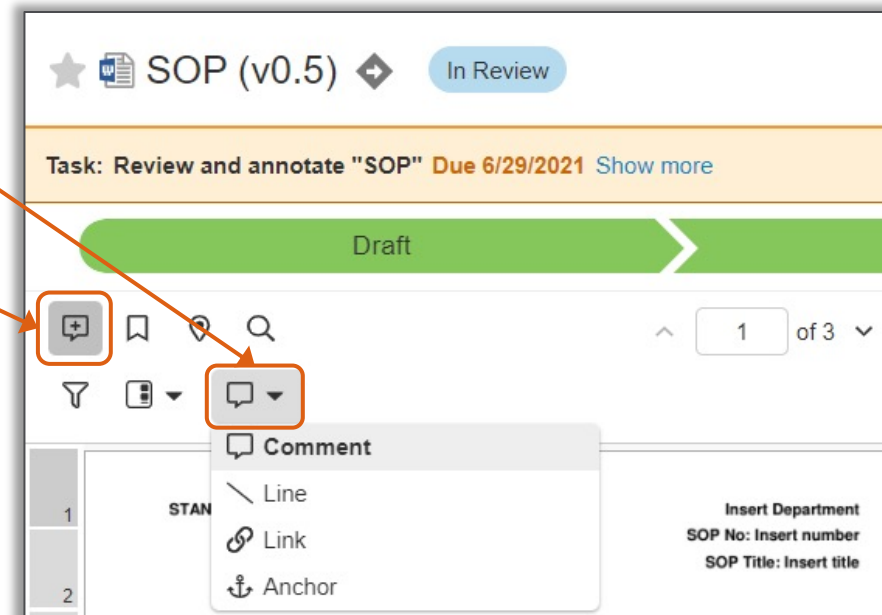
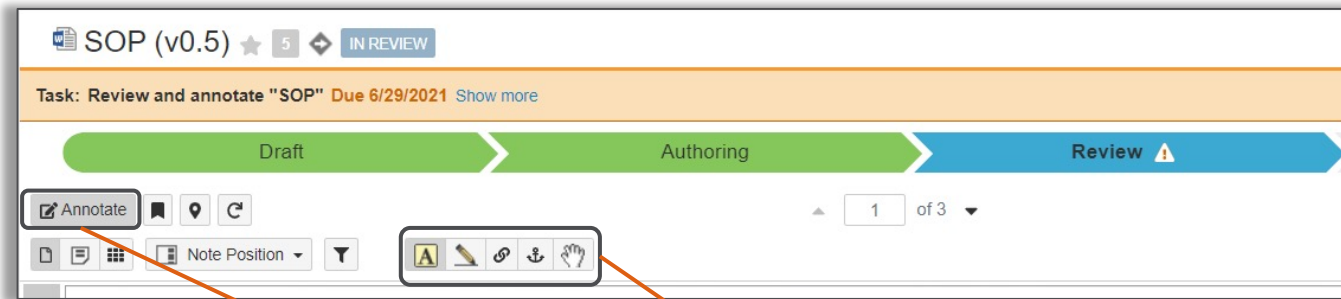
# Document Lifecycles and Workflows

- If a direct State Change action is configured and available to you, you will see a new dropdown next to the current document state
- Users with the correct permissions can change states directly from this new dropdown, in addition to the Workflow menu action

The screenshot displays the Vault document management interface. At the top, there is a navigation bar with the Vault logo, a search bar for documents, and user information for 'Action UI (biorad.com)'. Below the navigation bar, a breadcrumb trail shows 'Home > Library > Reports > Dashboards > Loader > Products'. A '+ Create' button and a settings gear icon are also visible. The main content area shows a document titled 'SOP (v0.5)' with a star icon. A dropdown menu is open next to the document, showing 'Draft' (selected) and 'Approved'. An orange arrow points to the 'Draft' option in the dropdown. Below the document title, a progress bar indicates the document's lifecycle stages: 'Draft' (highlighted in blue), 'Authoring', 'Review', and 'Approved'. The document content area shows a table with three rows. The first row contains the text 'STANDARD OPERATING PROCEDURE'. The second and third rows contain placeholder text: 'Insert Department', 'SOP No: Insert number', and 'SOP Title: Insert title'. On the right side, an 'INFORMATION' panel is visible, showing details for the document: 'Name: SOP', 'Title', 'Type: General Documents', and a 'Reclassify' button. The bottom of the interface shows a footer with the Vault logo, copyright information, and the page number 140.

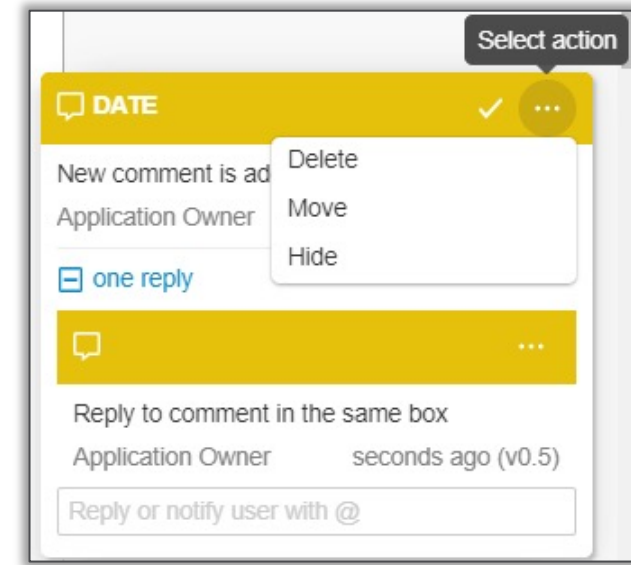
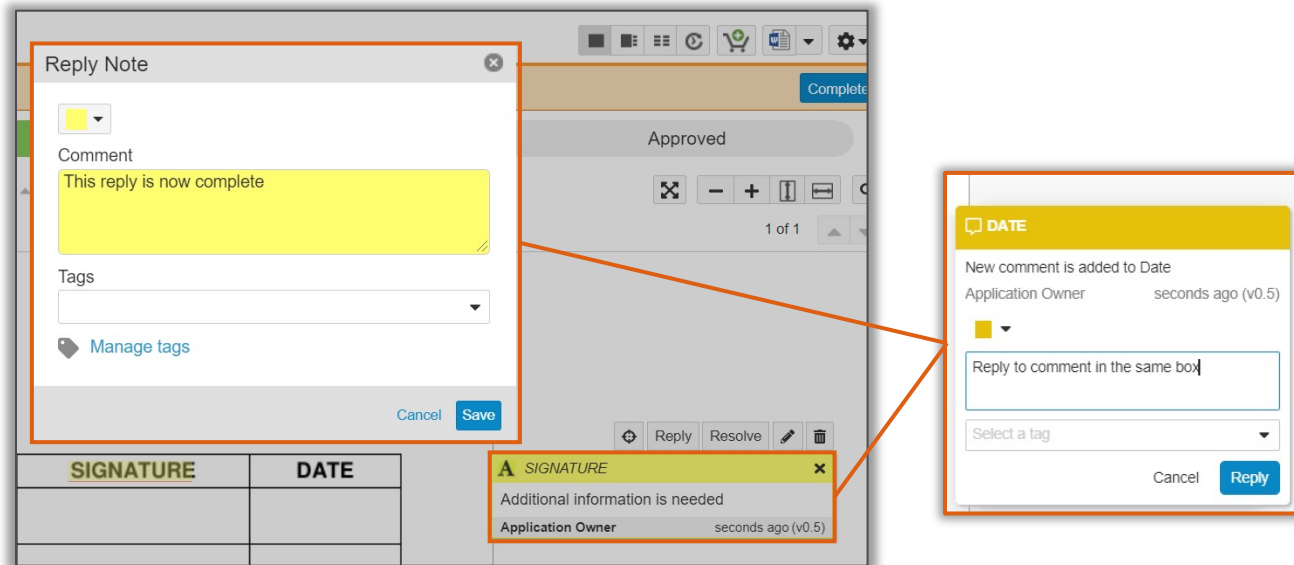
# Annotations

- 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

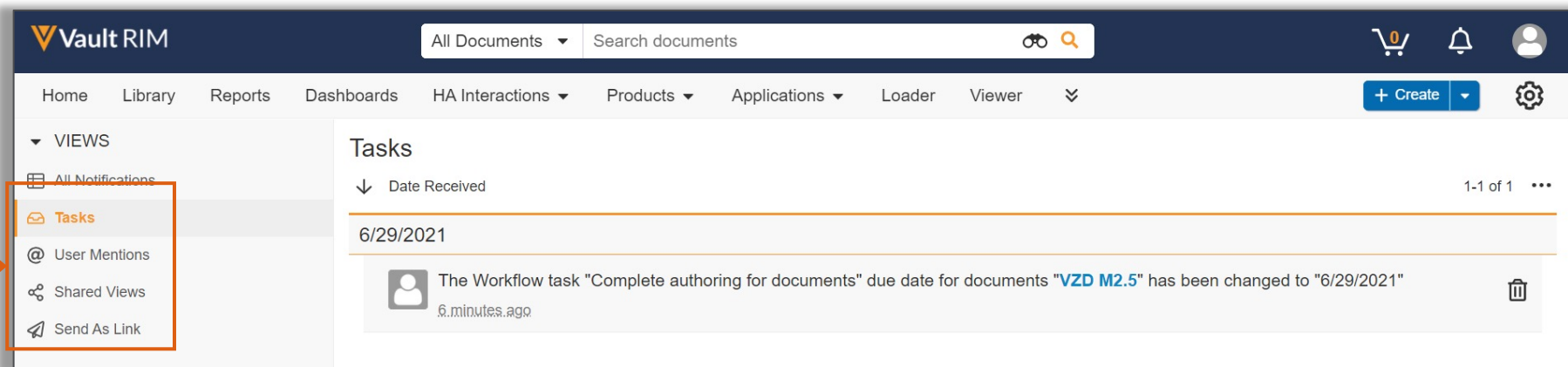
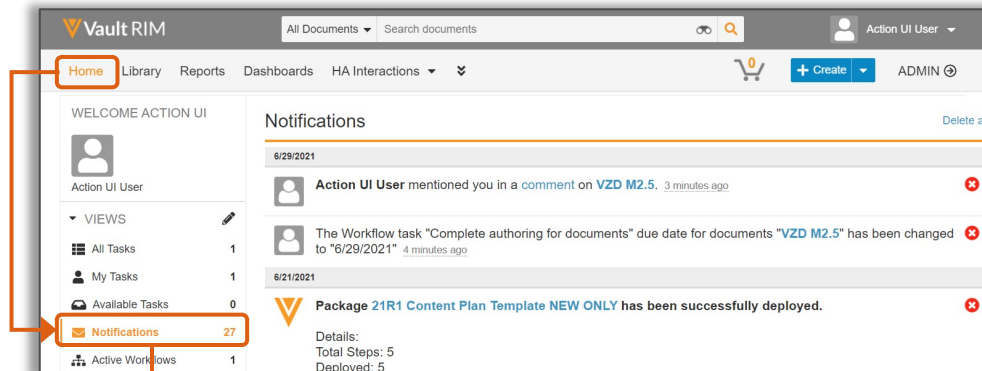
The image displays the Vault application interface with a focus on the notification feature. A callout box labeled "Notification Badge/ Bell Notification" points to the bell icon in the top right corner of the application. The main screenshot shows the "All Applications" table with columns for Application Number, Boolean Field, Region, Procedure Type, Application Type, and Lead Mar. A notification badge is visible on the bell icon. A "View all" button is also present. A secondary screenshot shows the "All Notifications" page, which lists various notifications such as "You have been assigned the task: Complete facility review" and "Flash Report: Test Flash Report (weekly)".

Application Number	Boolean Field	Region	Procedure Type	Application Type	Lead Mar	Status
1234	Yes	European Union	Centralised Procedure	Clinical Trial Authorisation (CTA)	European	Active
AU-39202	Yes	AsiaPac		Marketing Authorisation Application (MAA)	Australia	Active
BE-CTA-010101	No	European Union		Clinical Trial Authorisation (CTA)	Belgium	Active
BEH102345DC	Yes	European Union	Centralised Procedure	Marketing Authorisation Application (MAA)	Belgium	Active
CTA-00785-IT		European Union		Clinical Trial Authorisation (CTA)	Italy	Active
CTA-00686-ES		European Union		Clinical Trial Authorisation (CTA)	Spain	Active
CTA-08774-FR		European Union		Clinical Trial Authorisation (CTA)	France	Active
DE-039948		European Union		Marketing Authorisation Application (MAA)	Germany	Active
DEHMRP03498		European Union				
DEHMRP122330		European Union				
EMEAHC012930		European Union				
IE-12345		European Union	Decentralised Procedure			
MAA-A3MF-03838		European Union				
NDAT2345		North America				
NL-CTA		European Union				
PL-CTA-010103		European Union				
PT-CTA-010104		European Union				



# Notifications Page

- Notifications are no longer available on the Home page, users can access all their notifications by clicking 'View all' in the notifications panel
- The new notifications page displays the 1000 most recent notifications
- Notifications can be filtered by your tasks, your @mentions, views that have been shared with you, and documents/objects sent to you via links





# 30-Day 'What's New' Notification

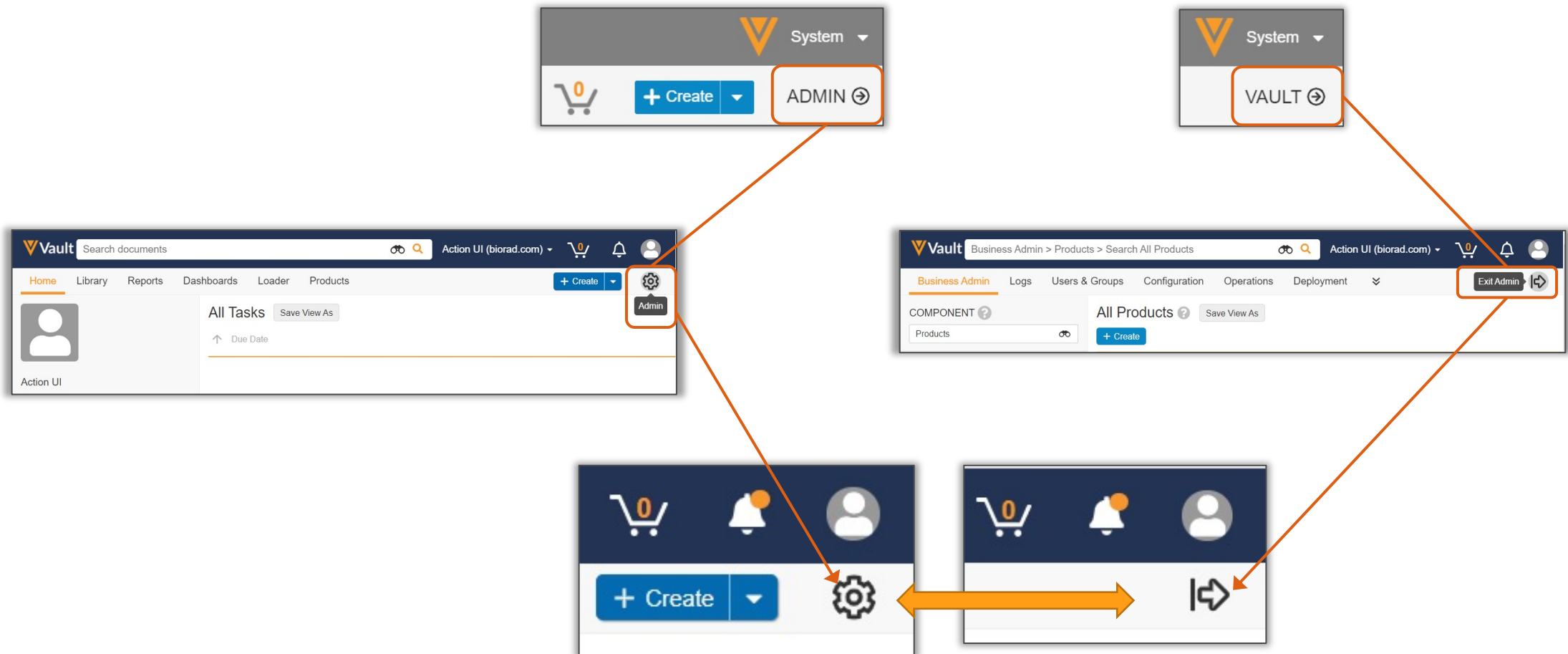
- A 'What's New' notification remains pinned at the top of the notification panel for 30 days
- Includes links to Vault Help Release Notes, and screenshots to familiarize users with Action UI
- This page content is controlled by Veeva and only accessible through the new Action UI notifications

The screenshot shows a notification panel titled "Release Notes" with the Veeva Vault logo in the top left. The main heading reads "Explore Action UI and discover easier and more productive ways to use Vault". Below this, there is a section titled "Action Bar" with a paragraph explaining its functionality: "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." A "Learn More" link is provided below the text.

To the right of the text is a screenshot of the Veeva Vault Quality interface. It shows a "Complaint: QE-000001" record with a "Workflow Timeline" section expanded to "Intake". A "START WORKFLOW" dropdown menu is open, showing options: "Send for Review", "CHANGE STATE", and "Change State to In Initial Review". The interface includes a navigation menu on the left, a search bar at the top, and various data fields for the complaint record.

# Accessing the Admin Panel

- Instead of toggling between **ADMIN** and **VAULT**, Admins will now see a settings gear and arrow to navigate between Admin-only and Vault user arenas



# The Admin Panel

- Action UI updates, such as the ellipsis icon, Action Bar (including frequently used actions), Notification bell, and styling apply to the Admin panel as well

The screenshot displays the Veeva Vault Admin Panel interface. At the top, there is a dark blue header with the Vault logo, a search bar for documents, and navigation icons for shopping cart, notifications, and user profile. Below the header is a navigation bar with tabs for Business Admin, Logs, Users & Groups, Configuration, Operations, **Deployment** (highlighted), Connections, and Settings. The main content area shows the 'Inbound Packages' section with a breadcrumb 'Inbound Packages >'. A specific package is highlighted: '★ Inbound Package: PKG-0101' with an 'Active' status. To the right of the package name, it indicates '5 of 5 records in this list' and includes a refresh icon and a three-dot menu icon. The three-dot menu is open, showing a 'MANAGE' section with 'Validate', 'Review & Deploy', and 'Delete' options, and an 'EXPORT' section with 'Package Component Comparison'. Below the package name, a 'Details' section is expanded, showing a table of package information:

<b>Name</b>	PKG-0101	<b>Source Vault</b>	67,342
<b>Summary</b>	UI Test 6.16	<b>Author</b>	maryanne.potok@vv-consulting.com

# User Profile

- The User Profile has a cleaner, sleeker look

The screenshot displays the Vault RIM user profile interface for Larissa Smart. The page is organized into several sections:

- Header:** Vault RIM logo, search bar, and navigation menu (Home, Affiliate Home, Library, HA Interactions, Registrations, Applications, Products, Packaging, Reports, Viewer, XEVMPD, Admin Configuration).
- Left Sidebar:** User profile for Larissa Smart, including a placeholder for a profile picture, email (larissa.smart@veeva.com), user name (larissa.smart@viv-consulting.com), password management link, file manager link, and a list of groups (All Internal Users, Report Administrators, System Administrators).
- General Information:** Fields for Name (Larissa Smart), First Name (Larissa), Last Name (Smart), Mobile (1234567890), Fax, Location (Pennsylvania), Timezone (GMT-05:00 Eastern Standard Time (America/New\_York)), Title (CSM), Company (Veeva Systems), and Locale (United States).
- Notification and Email Preferences:** A table with columns for Notification, Every Occurrence, and Summary. All notification options are checked.
- Mobile App Registrations:** A table with columns for Device Name, Application, Device Model, Registration Date, and Status. It shows "No items found".
- Delegate Access:** A table with columns for Delegate, Start Date, and End Date. It shows "No items found".



# Provision Pre-release Sandbox

- To test the new 21R2 features without Action UI, uncheck the feature setting in your Production Vault *prior to* refreshing your Pre-release Vault
- Action UI can then be enabled/disabled with the feature setting to continue any necessary testing

The screenshot displays the Veeva Vault interface. The top navigation bar includes the Veeva logo, a search bar with 'All Documents' and 'Search documents' options, and icons for a shopping cart, notifications, and user profile. The main navigation menu on the left lists 'ENVIRONMENT', 'MIGRATION', and 'Sandbox Vaults' (which is highlighted). The 'Deployment' tab is selected in the top navigation. The 'Sandbox Vaults' section is active, showing two tables.

**Available Sandbox Vaults**

Type	Available	Allowed
Configuration	2	3






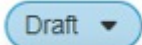




**Active Sandbox Vaults**

[+ Create](#) 1-1 of 1

Name	Source Vault	Release	Type	Available (Config)	Status	Domain
Action UI RIM Sandbox	Regulatory	Limited	Configuration	0	Building	mdltest.com



# 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  

# Additional Resources and Next Steps

- Refer to the [Action UI Information Page](#) for updates, future webinar registration links and recordings, and additional resources as they become available
- Refer to [Vault Help](#) for more information about the Action UI updates as new release notes are posted
- Contact your Managed Services or Professional Services consultant for release management and change control questions
- Contact your Customer Success Manager or Account Executive with any other questions





# Appendix



# Spark Message Reverse IP Lookup Change



- Outbound Spark messages are now sent from an IP address associated with Veeva Vault
  - Developers and network engineers can apply network and firewall rules by allow listing \*.veevavault.com
  - Customers who are currently allow listing by domain will need to update their rules to support \*.veevavault.com domains

# Vault Loader Command Line Tool Zip File Improvements



- The VaultDataLoader.zip file for the Vault Loader command line tool can now be extracted using the native macOS Archive Utility application
- Learn more about the [Vault Loader Command Line Tool](#)

# Standardize Escape Sequence for Special Characters



- This feature standardizes the VQL escape character ( ) and allows developers and Admins implementing Criteria VQL to reference supported special characters on all document fields, object fields, and other VQL endpoints
  - The supported list of characters includes: backslash (\), carriage return (r), double quote (“), line feed (n), percent sign (%), single quote (‘), asterisk (\*), and tab (t). Vault will automatically convert existing Criteria VQL to use the standardized escape characters

# EDLs: Create Document from Template



- A new user action is available to create a document from a template directly from an EDL Item without navigating away
  - The newly created document automatically matches the EDL Item, just like uploading a document or creating a placeholder directly from an EDL Item

# Deprecating Vault-Wide Document Migration Mode



- Vault-wide Document Migration Mode will be deprecated completely
  - Instead, use the X-VaultAPI-MigrationMode API header with the Vault REST API's Create Multiple Documents, Create Multiple Document Versions, Update Multiple Documents, and Add Multiple Document Renditions endpoints, or use Vault Loader with the Document Migration Mode checkbox selected. These methods minimize risk and end-user impact by ensuring that only the documents being created and updated in the API request are subject to migration mode limitations, allowing the rest of the Vault to remain fully operational
  - Learn more about [Create Multiple Documents](#) using Document Metadata APIs
  - Learn more about [Create Multiple Document Versions](#) using Document Metadata APIs
  - Learn more about [Update Multiple Documents](#) using Document Metadata APIs
  - Learn more about [Add Multiple Document Renditions](#) using Document Metadata APIs

# Commercial Data Model Changes



- Added the following new object:
  - *Positive/Negative List* (positive\_negative\_list\_\_v)
- Added the following shared document fields:
  - Add to Positive/Negative List (add\_to\_positive\_negative\_list\_\_v)
  - *Delivery to HCPs* (delivery\_to\_hcps\_\_v)
  - *Positive/Negative List Name* (positive\_negative\_list\_name\_\_v)
  - *Promotional Material Document Name* (promotional\_material\_doc\_name\_\_v)
  - *Promotional Material Document Description* (promotional\_material\_doc\_description\_\_v)
  - *Promotional Material ID* (promotional\_material\_id\_\_v)
  - *CRM Rendition Override* (crm\_rendition\_override\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_\_v)
  - *Website* (website\_\_v) now editable\*
- Moved the following fields to the *CRM Properties* display section in template:
  - See list of moved fields [here](#)



# Commercial Data Model Changes

- Added the following fields to the *Multichannel Presentation* document type:
  - *CRM Org* (crm\_org\_\_v)
  - *CRM Product* (crm\_product\_\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_\_v)
- Added the following fields to the *Multichannel Slide* document type:
  - *CRM Org* (crm\_org\_\_v)
  - *CRM Product* (crm\_product\_\_v)
  - *CRM Directory* (crm\_directory\_\_v)
  - *CRM Searchable Keywords* (crm\_keyword\_\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_\_v)
- Made the following inactive document fields active:
  - *CRM Org* (crm\_org\_\_v)
  - *CRM Product* (crm\_product\_\_v)
  - *CRM Searchable Description* (crm\_searchable\_description\_\_v)
  - *CRM Searchable Keywords* (crm\_keyword\_\_v)

# Commercial Data Model Changes



- Added field dependency rules:
  - Within document type *Multichannel Presentation*, if *Publish for Veeva CRM (CLM)* equals *Yes*, fields *CRM Org*, *CRM Product*, *CRM Directory*, *CRM Searchable Description*, and *CRM Searchable Keywords* are required
  - Within document type *Multichannel Slide*, if *Publish for Veeva CRM (CLM)* equals *Yes*, fields *CRM Org*, *CRM Product*, *CRM Directory*, *CRM Searchable Description*, and *CRM Searchable Keywords* are required
- Reordered the CRM Properties (*crm\_properties\_\_c*) field layout as follows:
  - See list of reordered layout [here](#)
- Added value *Email* (*email\_\_v*) to the *Source* (*source\_\_v*) picklist





# Commercial Data Model Changes

- Added following new fields on Case Request (*case\_request\_\_v*) object:
  - *Recipient Email Address* (email\_recipient\_address\_\_v)
  - *Recipient Email Username* (email\_recipient\_username\_\_v)
  - *From* (email\_from\_\_v)
  - *To* (email\_to\_\_v)
  - *CC* (email\_cc\_\_v)
  - *Subject* (email\_subject\_\_v)
  - *Attachments* (email\_attachments\_\_v)
  - *Body* (email\_body\_\_v)
  - *Body Text* (email\_body\_text\_\_v)
  - *Sent* (email\_sent\_\_v)
  - *Received* (email\_received\_\_v)
  - *Message ID* (email\_message\_id\_\_v)
  - *Email Forwarding Address* (email\_forwarding\_address\_\_v)
- Added object type *Email Forwarding Email Address* (email\_forwarding\_address\_\_v) to the *Person* (person\_sys) object
- View full [Release Notes](#)

# Platform Data Model Changes

- The following components were added to Vault to support the Email to Vault feature:
  - The *Email* (email\_\_sys) object was added with following fields
    - *Recipient Email Address* (recipient\_email\_address\_\_sys)
    - *Recipient Email Username* (recipient\_email\_username\_\_sys)
    - *Sender Email Address* (sender\_email\_address\_\_sys)
    - *Sender User* (sender\_user\_\_sys)
    - *Sender Person* (sender\_person\_\_sys)
    - *Sent Date* (sent\_date\_\_sys)
    - *Subject* (subject\_\_sys)
    - *To* (to\_\_sys)
    - *CC* (cc\_\_sys)
    - *Message ID* (message\_id\_\_sys)
    - *Full Message ID* (full\_message\_id\_\_sys)
    - *Link* (link\_\_sys)
    - *Global ID* (global\_id\_\_sys)
  - The *Email Lifecycle* (email\_lifecycle\_\_sys) system-managed lifecycle was added with the following states
    - *New* (new\_\_sys)
    - *Processed* (processed\_\_sys)
    - *Failure* (failure\_\_sys)
    - *Inactive* (inactive\_\_sys)



# Platform Data Model Changes

- The *Emailed Document* (emailed\_document\_\_sys) object was added with the following fields
  - *Email* (email\_\_sys)
  - *Document* (document\_\_sys)
- The following component was added to Vault to support the Google Drive Integration feature:
  - Added value *Google Drive* (google\_drive\_\_sys) to the *Check Out Types* (checkout\_types\_\_sys) picklist
- The following components were added to Vault to support the Veeva ID Field on Person Object feature:
  - Added the text field *Veeva ID* (veeva\_id\_\_sys) to the *Person* (person\_\_sys) object
- View the full [Release Notes](#)

