21R3 Commercial & Medical Content Release Education

December 2021

Noor Noush

Customer Success Manager, NA

Lauren Adda

Customer Success Manager, NA

Veeva

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

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21R3 Key Dates

Dates	Event
November 1	(all PODs) Pre-release vaults available
November 1-5	Validation package available on VeevaDocs **November 1**: System Release Memo **November 2**: Compliance Documents **November 5**: Executed OQs
November 16	**Option 1 - Commercial and Medical Q&A Session** https://veeva.zoom.us/webinar/register/7316336229687/WN_5JGKSmnJRGCvSTpRlhVK0Q
November 23	**Option 2 – Commercial and Medical Q&A Session** https://veeva.zoom.us/webinar/register/WN_lglaSx3-QEyhAH7KBTCOSg
November 18	**Developer Release** https://veeva.zoom.us/webinar/register/WN_y9N5TTUuR-OWlbSgHzlVhw
November 19	Release to all limited release PODs and PODs VV1-12, VV1-1069, VV1-1065, VV1-1088, VV1-1054, VV2-2122 Vault *File Manager does not release at this time, and instead releases with the general release PODs*
December 3	Release to all general release PODs

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Announcements

Internet Explorer

22R1

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

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

Supported Browsers

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

- Supported browsers

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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

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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

21R2 → 21R3

Default ON / Option OFF

Auto-ON

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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

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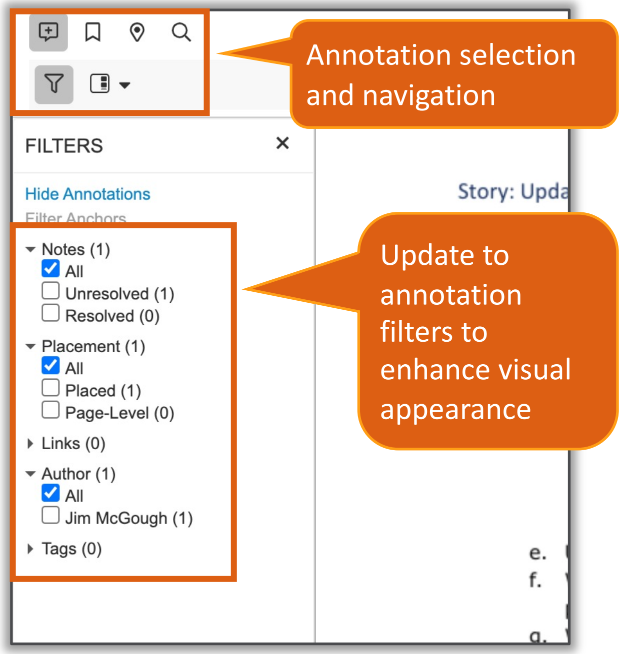
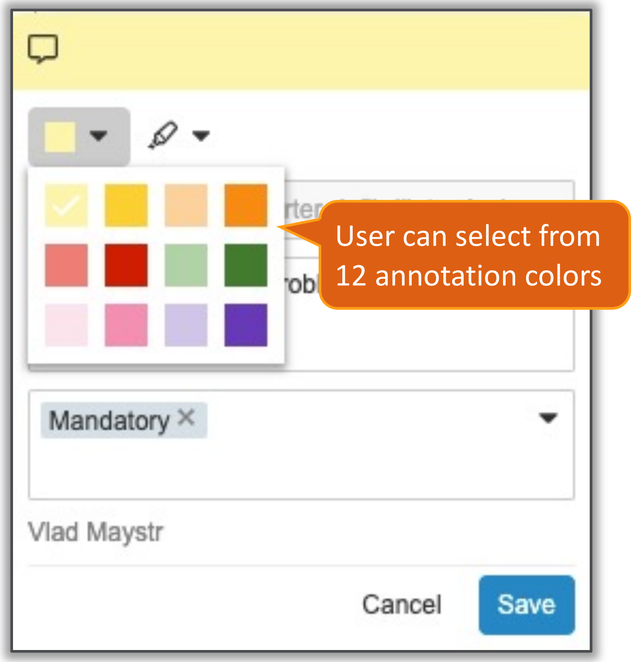
Documents

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]





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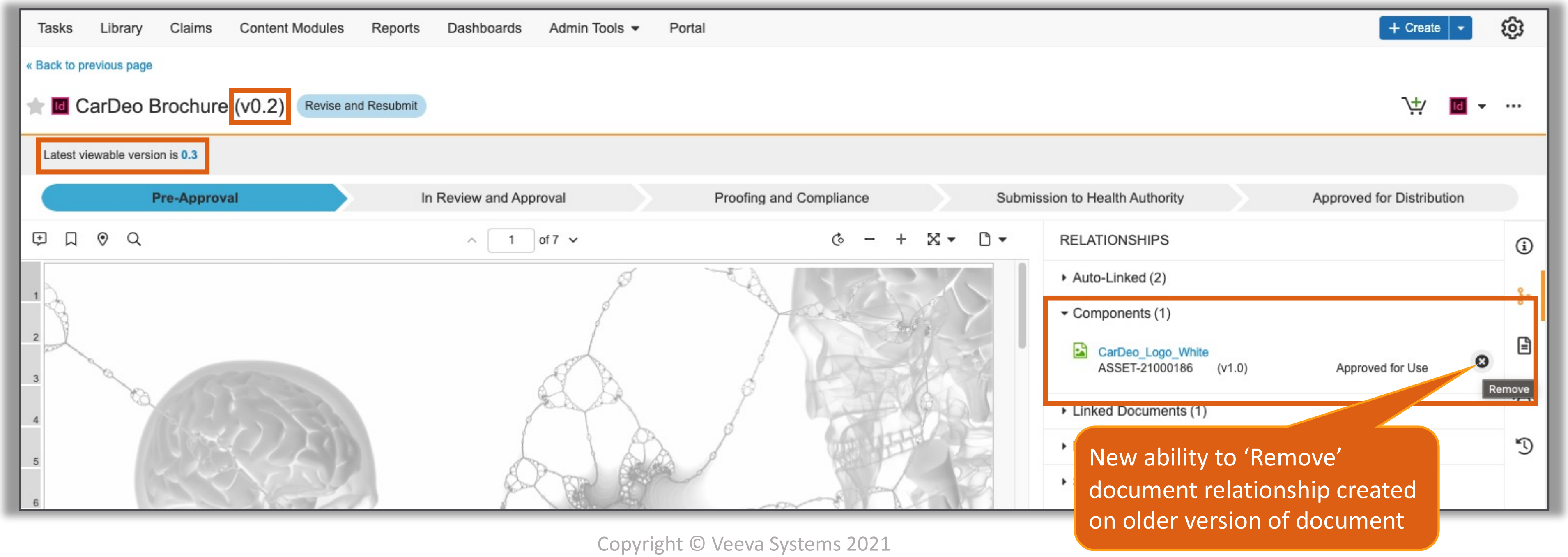
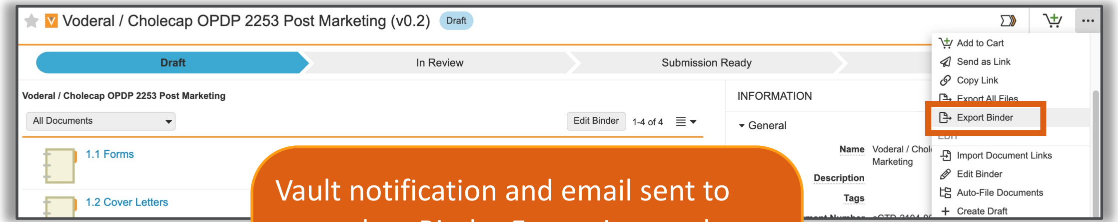
Delete Document Relationships on Older Versions

- 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]()



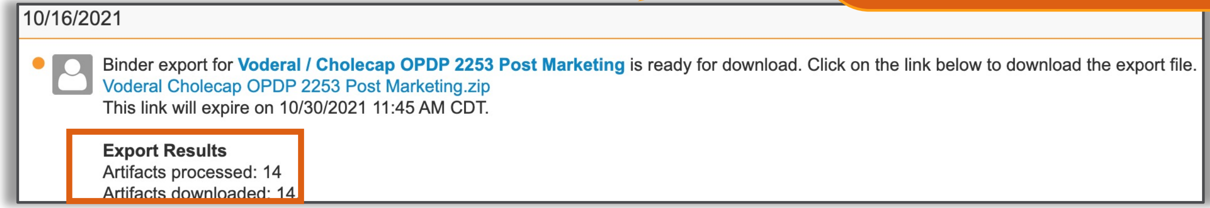
Export Binder Notifications: Show Failed Document Exports

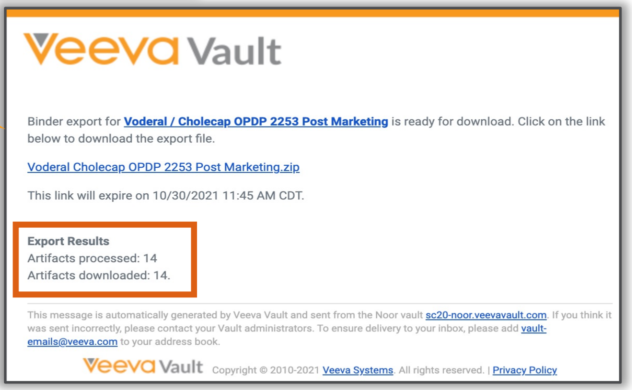
- The *Export Binders* action notification now includes a new ‘Export Results’ section, indicating the total number of items that were processed, downloaded, or failed



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

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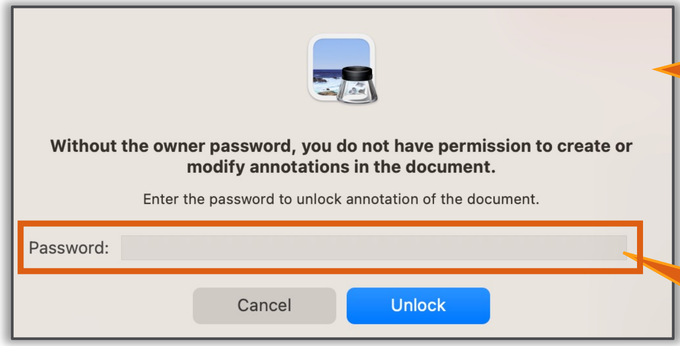
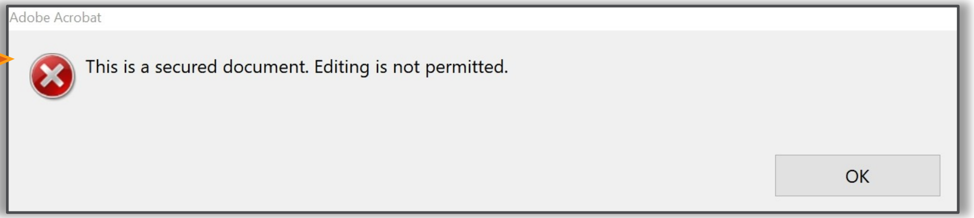
Protected PDF Renditions

- 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]

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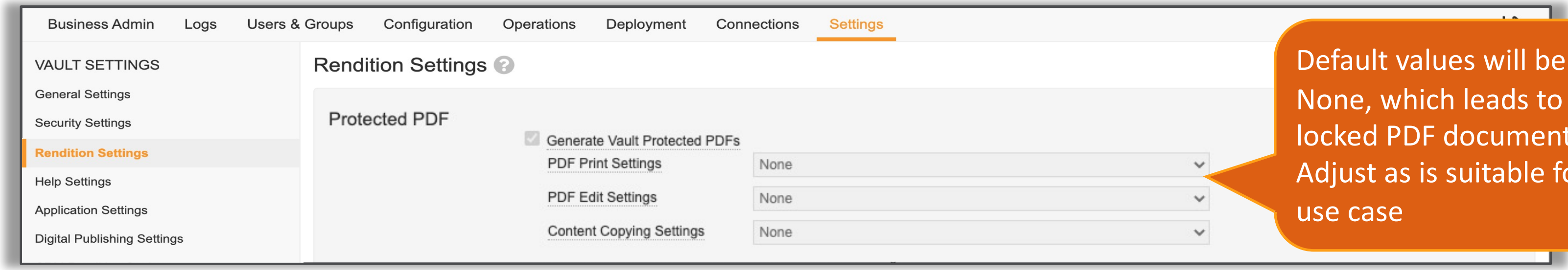
Protected PDF Renditions

- 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

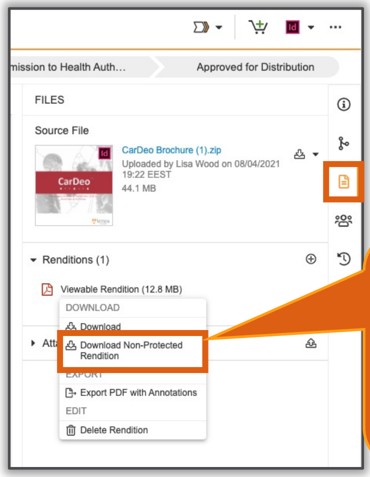
- ✓ None
- Lo Resolution (150 dpi)
- High Resolution

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

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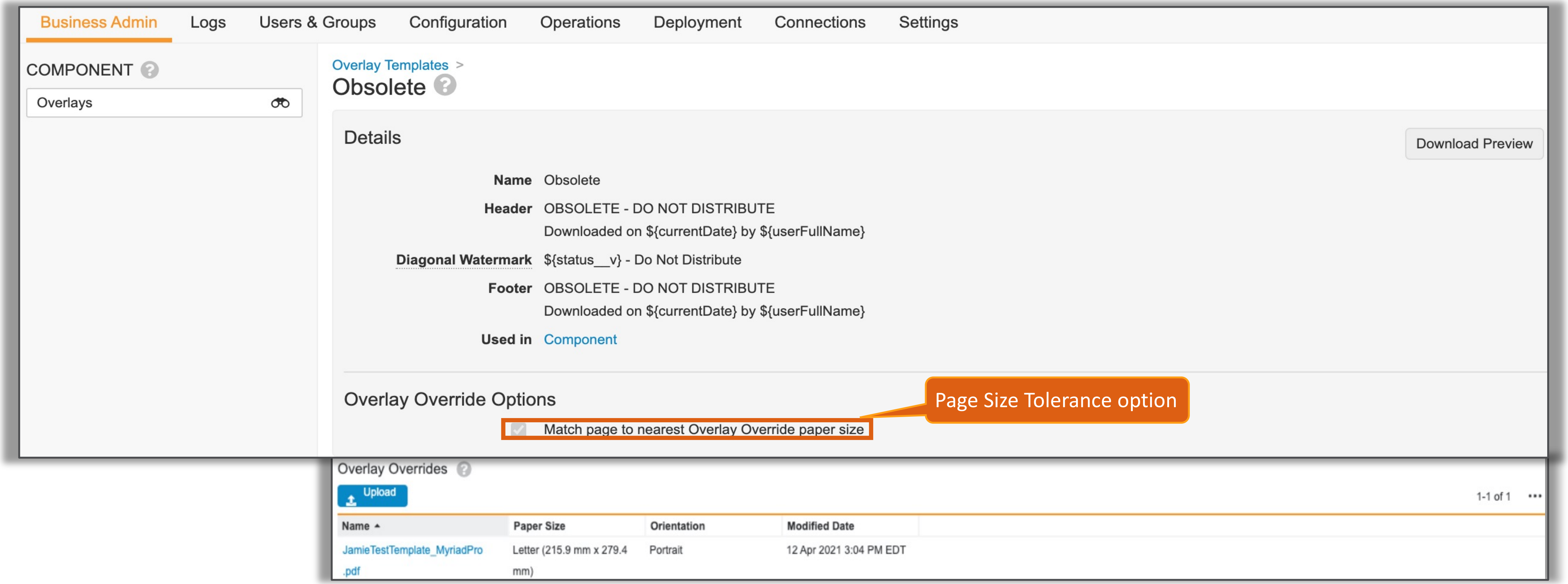
Overlay Override Page Size Tolerance

- 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



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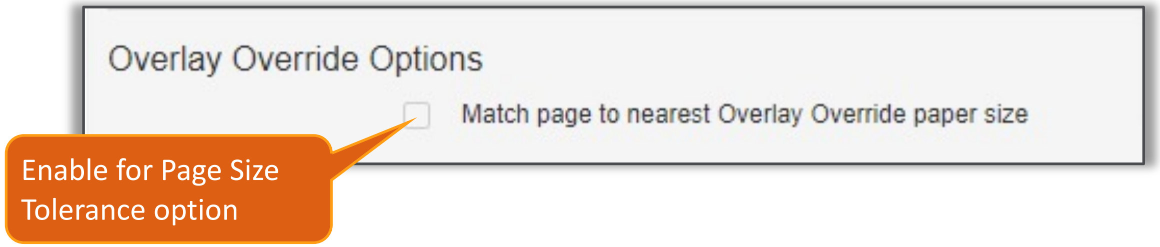
Overlay Override Page Size Tolerance

- 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



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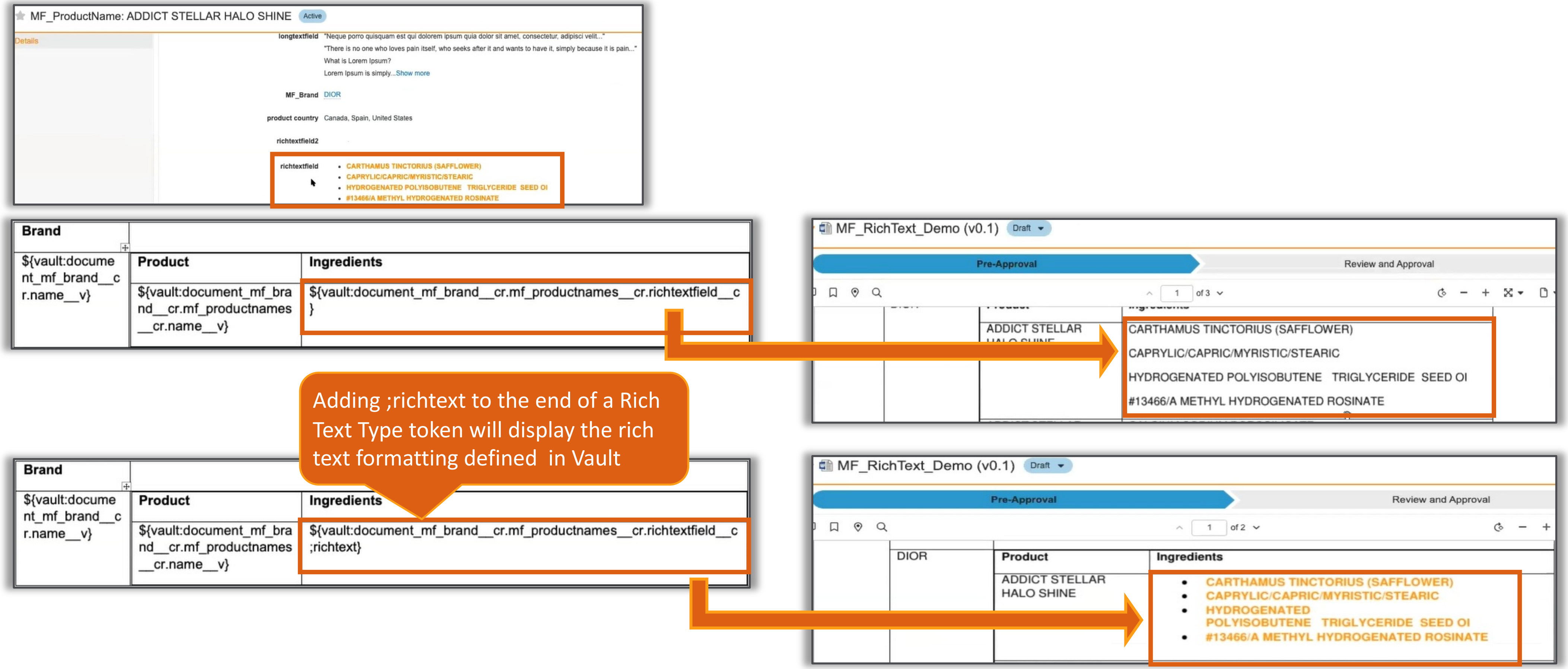
Rich Text for Merge Fields

- 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}



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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

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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

${vault:document_city__cr.province__cr.country__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}	${vault:document_city__cr.province__cr.name__v}	${vault:document_city__cr.name__v}

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

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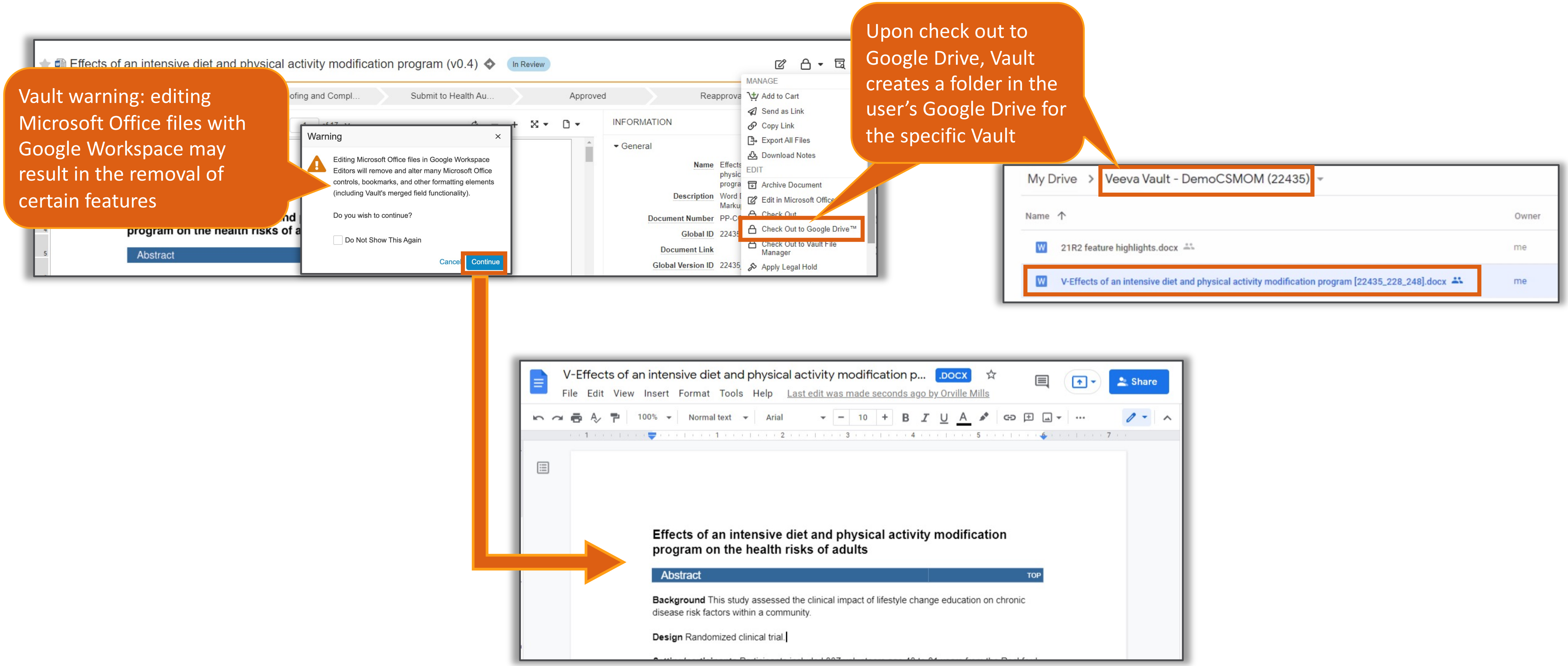
Google Drive Integration

- 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



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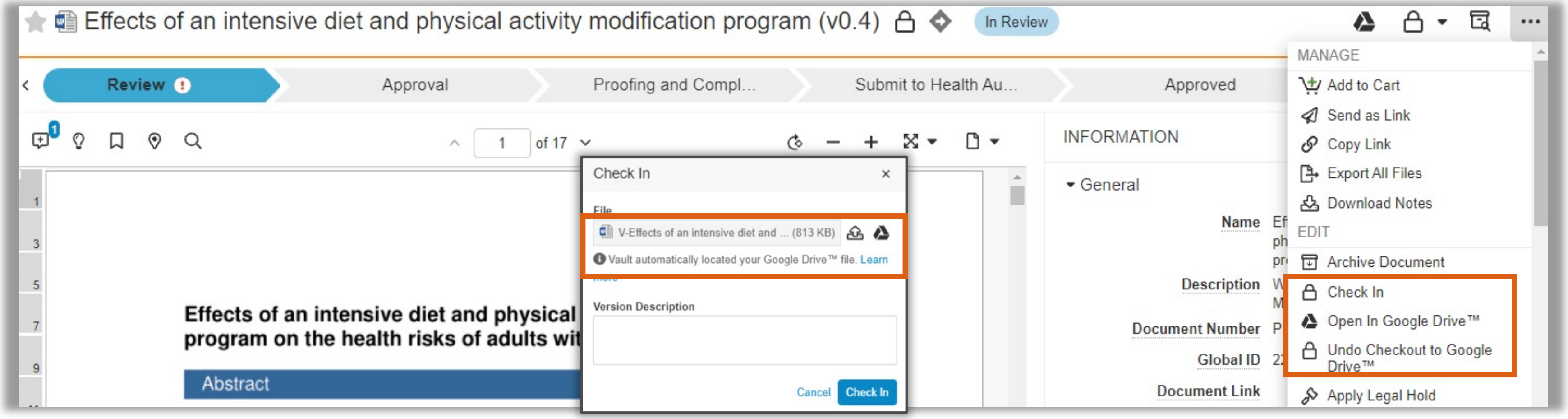
Google Drive Integration

- 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

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Google Drive Integration

- Configuration
  - Admin > Settings > Checkout Settings > Edit > Enable ‘Google Drive Integration’

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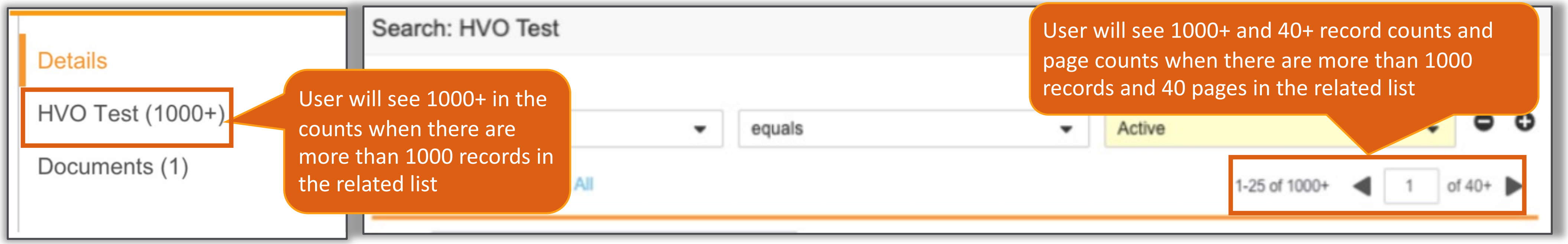
Objects

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]

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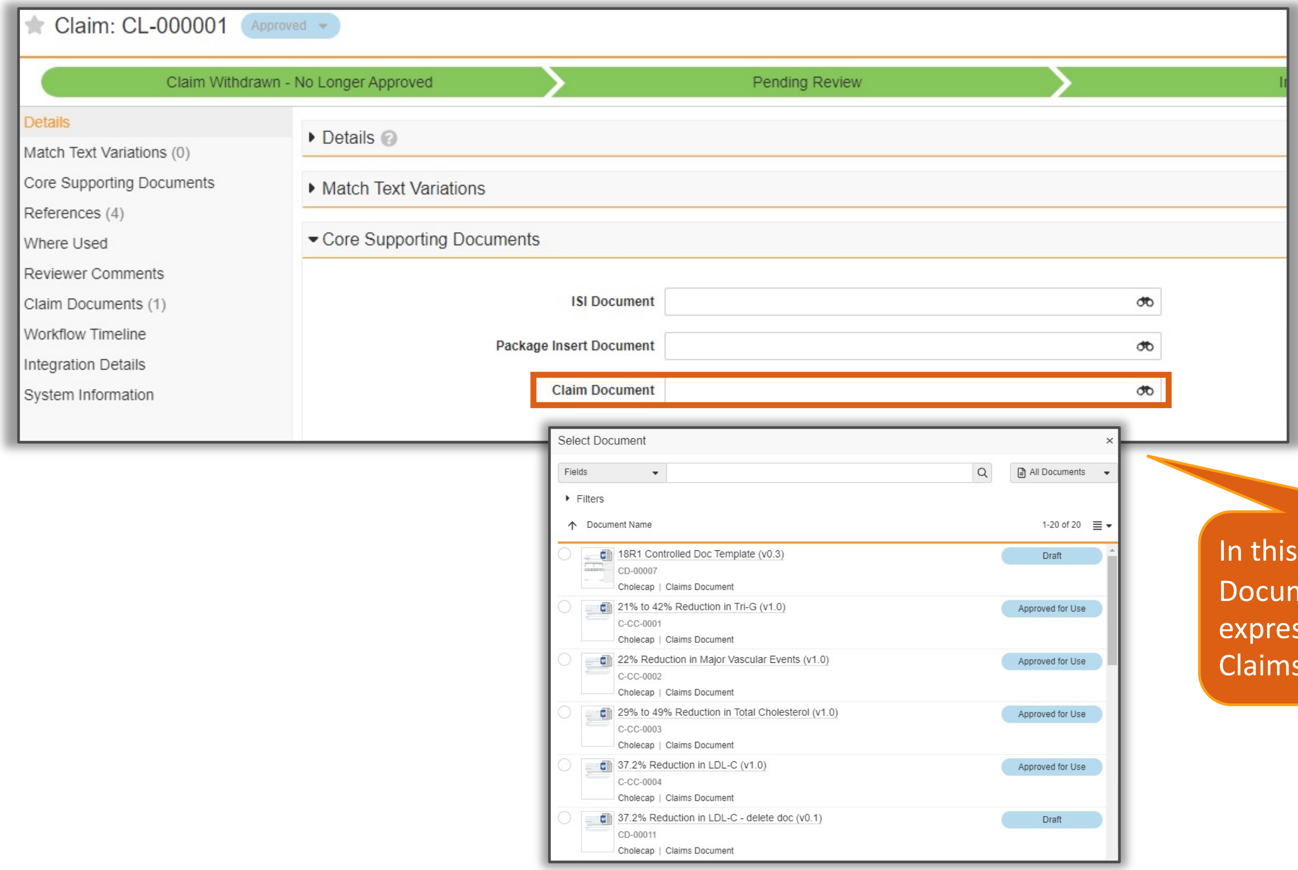
Document Reference Field Constraints

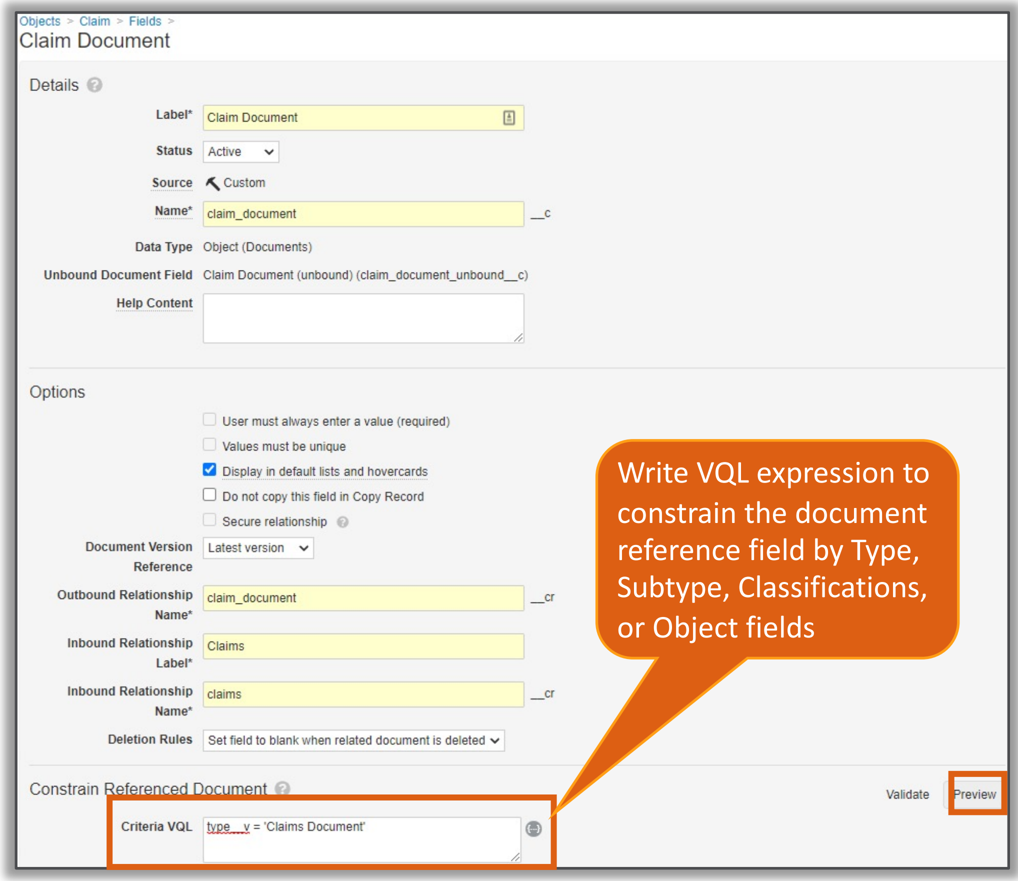
- Vault can now constrain document reference fields on objects based on types, subtypes, and classifications or based on values of other document fields
  - This feature can help organizations align document reference fields to specific business processes by narrowing the documents available for selection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



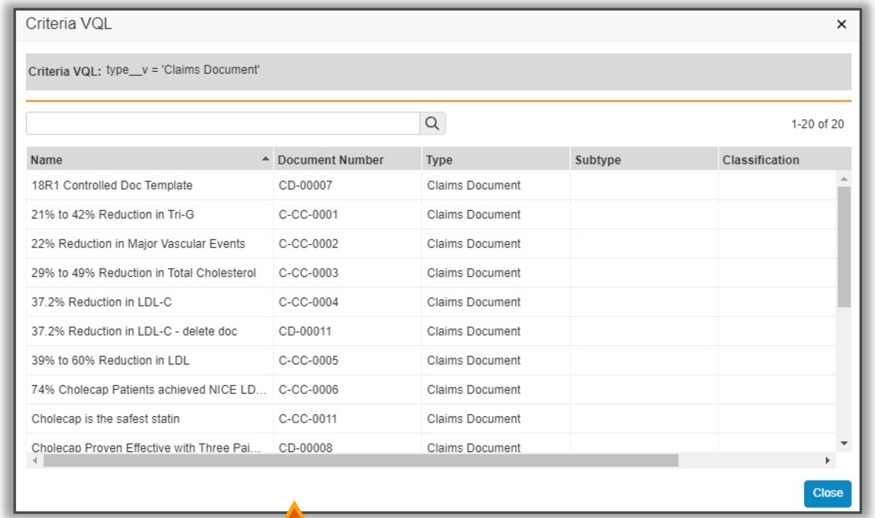
In this example, the Claim Document field has a VQL expression constraint for Type = Claims Document

Document Reference Field Constraints

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



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



Admin can preview the VQL expression

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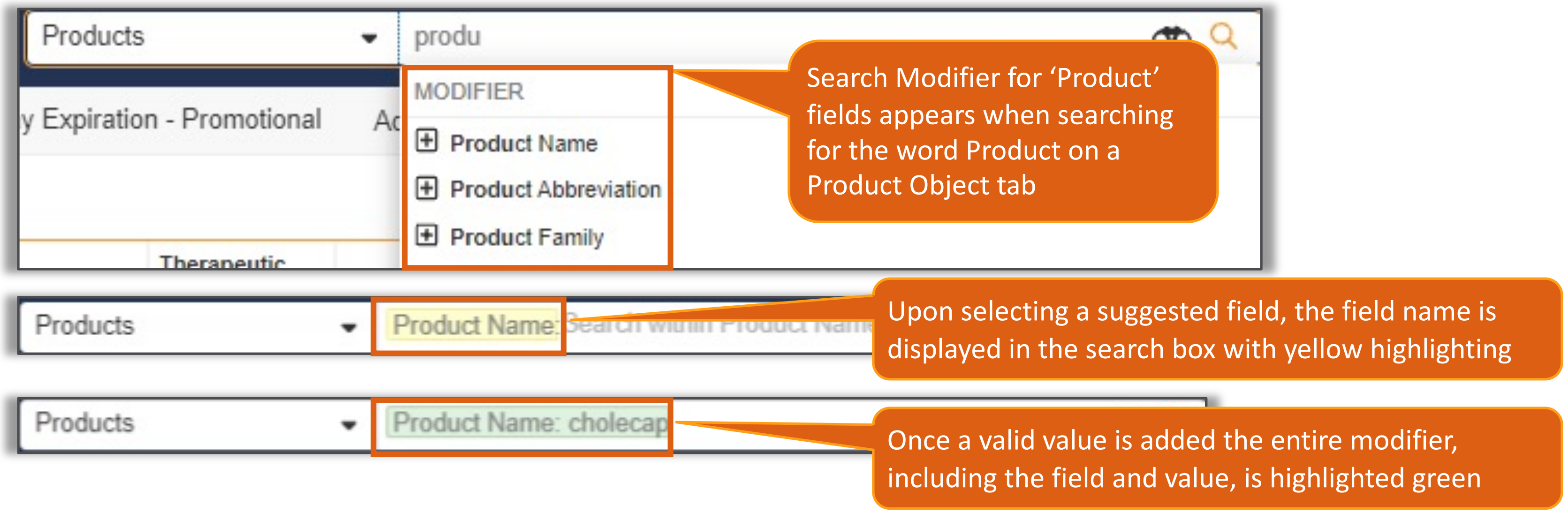
Searching & Filtering

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



- 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]

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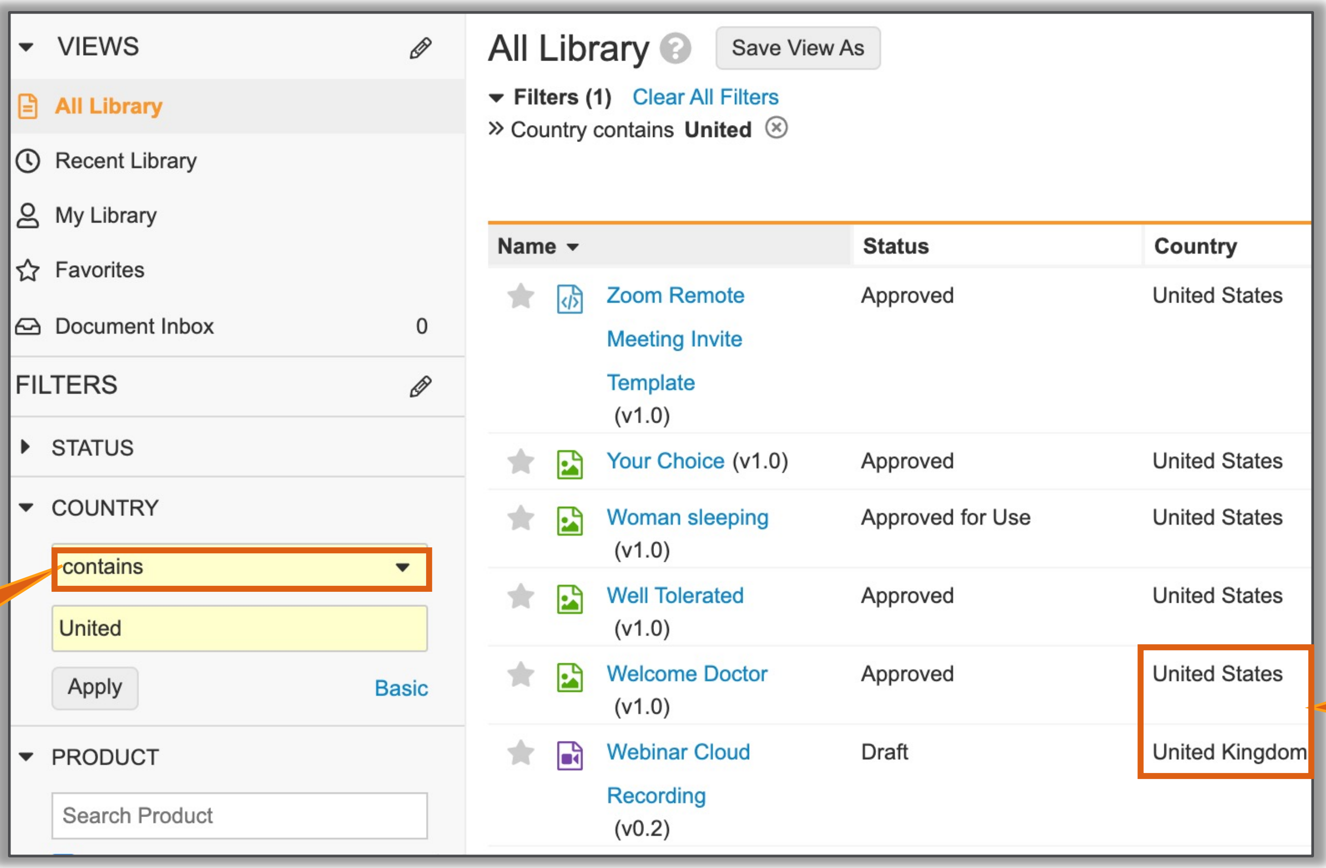
Substring Matching for Contains Operator

- 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



‘Contains’ Operator used to filter by countries including ‘United’

Filters all results with ‘United’ included in Country name

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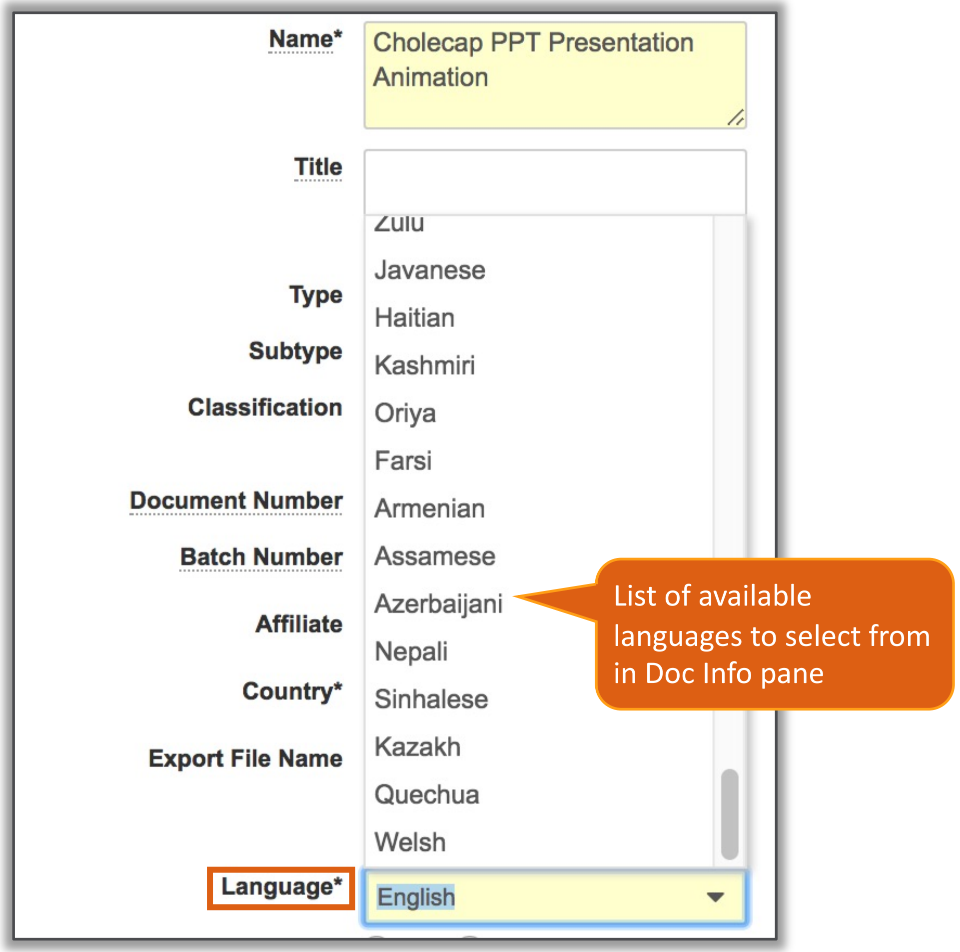
Add Language Options to Language Field

- 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



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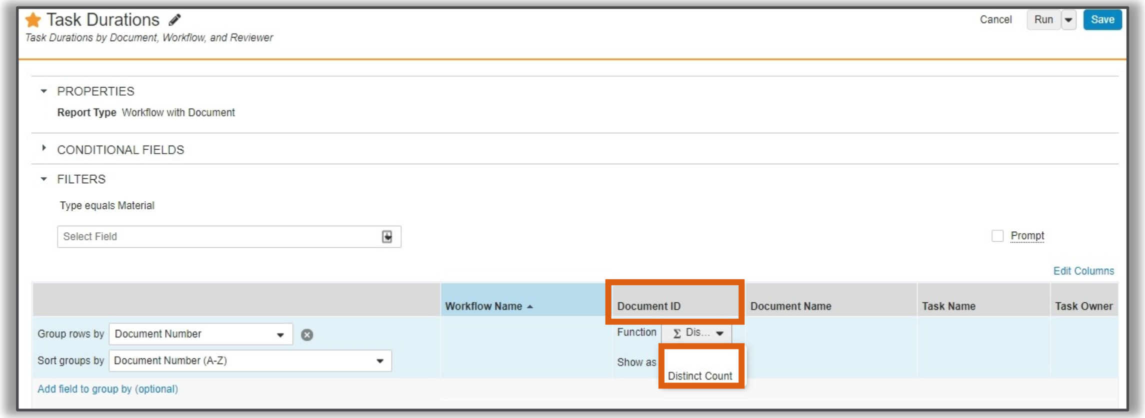
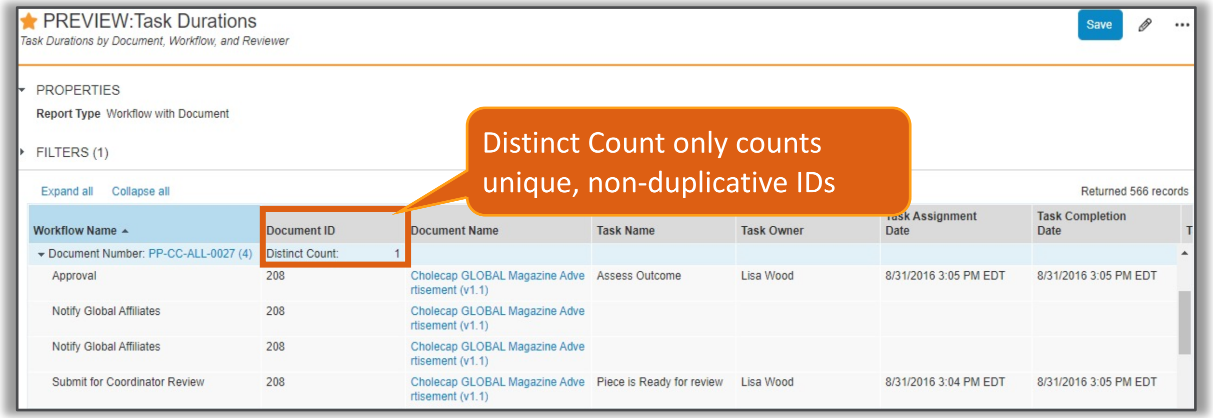
Reporting

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

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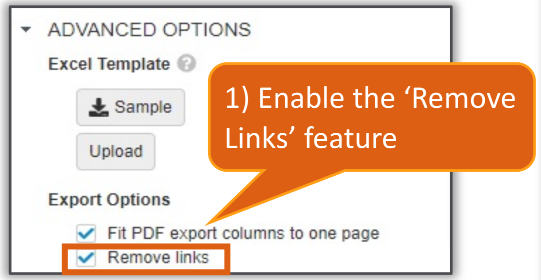
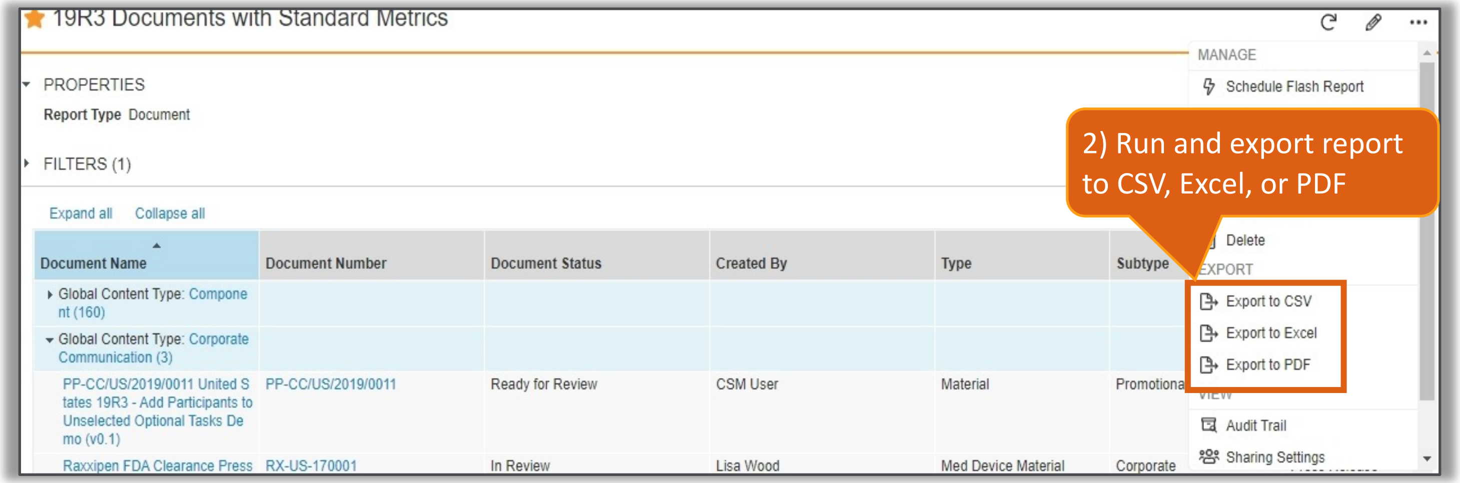
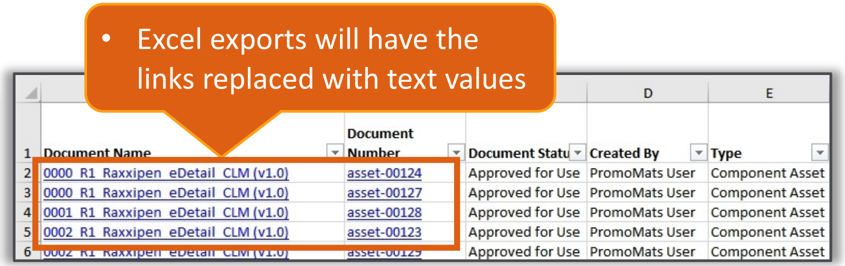
Remove Links in Report Exports

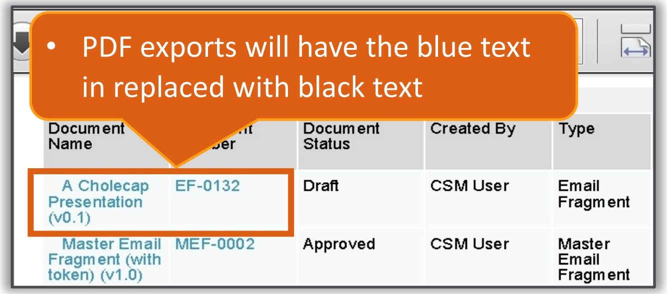
- There is a new Advanced Option in the report builder that will remove the links from reports that are exported to CSV, Excel, and PDF
  - This feature can be useful when sharing exported reports with non-Vault users as the links can cause confusion





  - Exported reports will have the following behavior:





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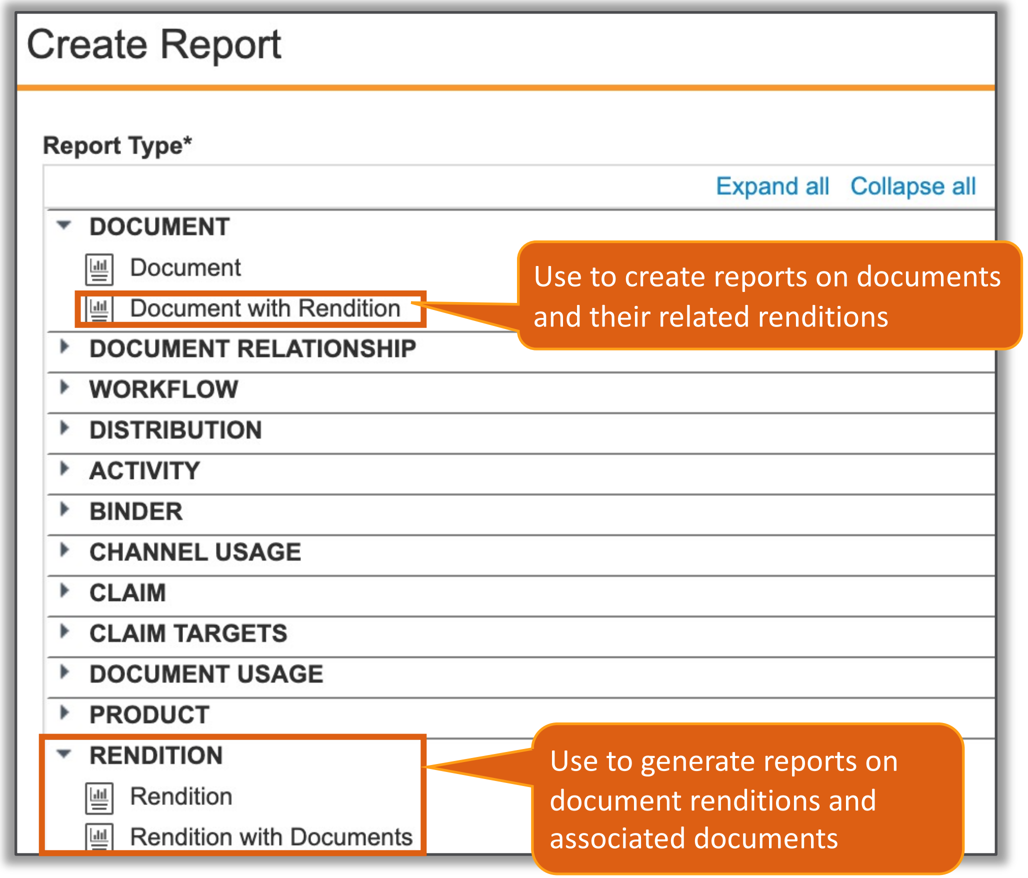
Rendition Reporting

- 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



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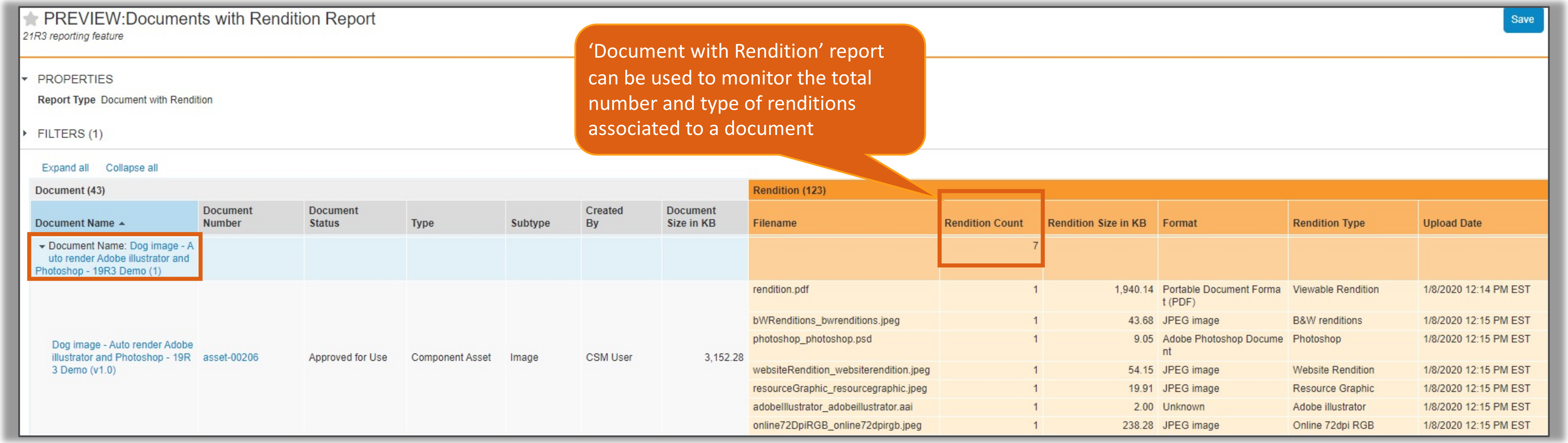
Rendition Reporting

- *'Document with Rendition'* report


PREVIEW:Documents with Rendition Report

21R3 reporting feature

Save

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

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

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

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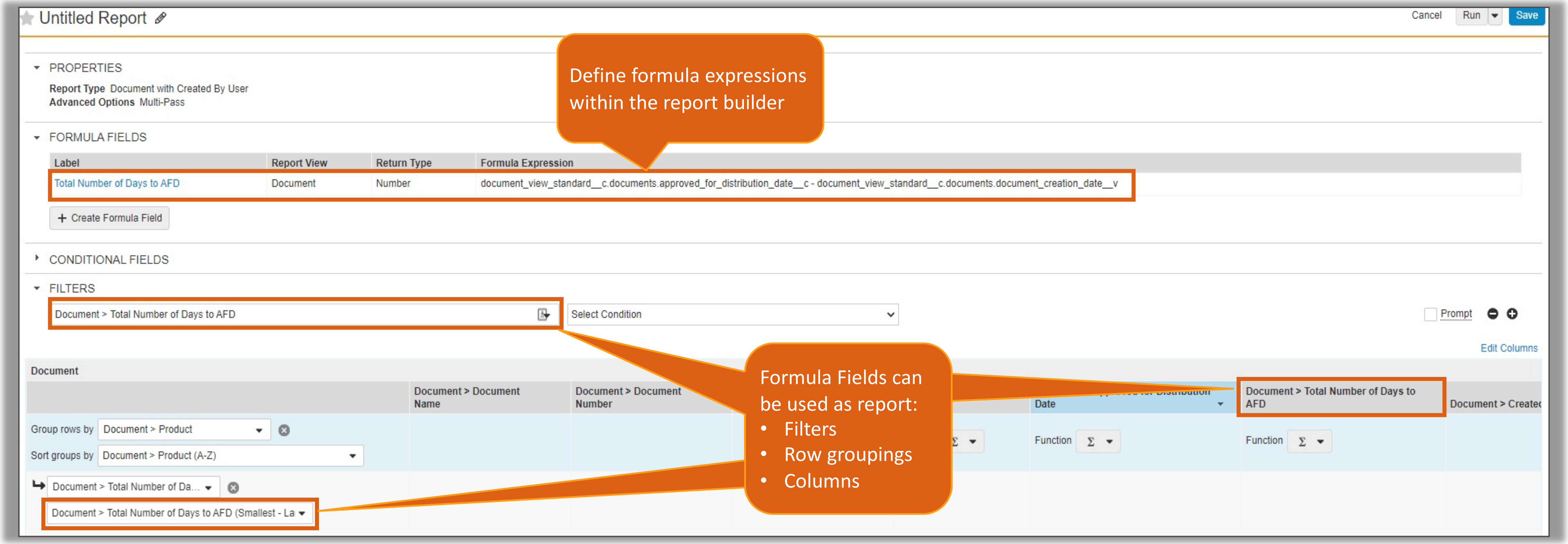
Formula Fields in Multi-Pass Reports

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



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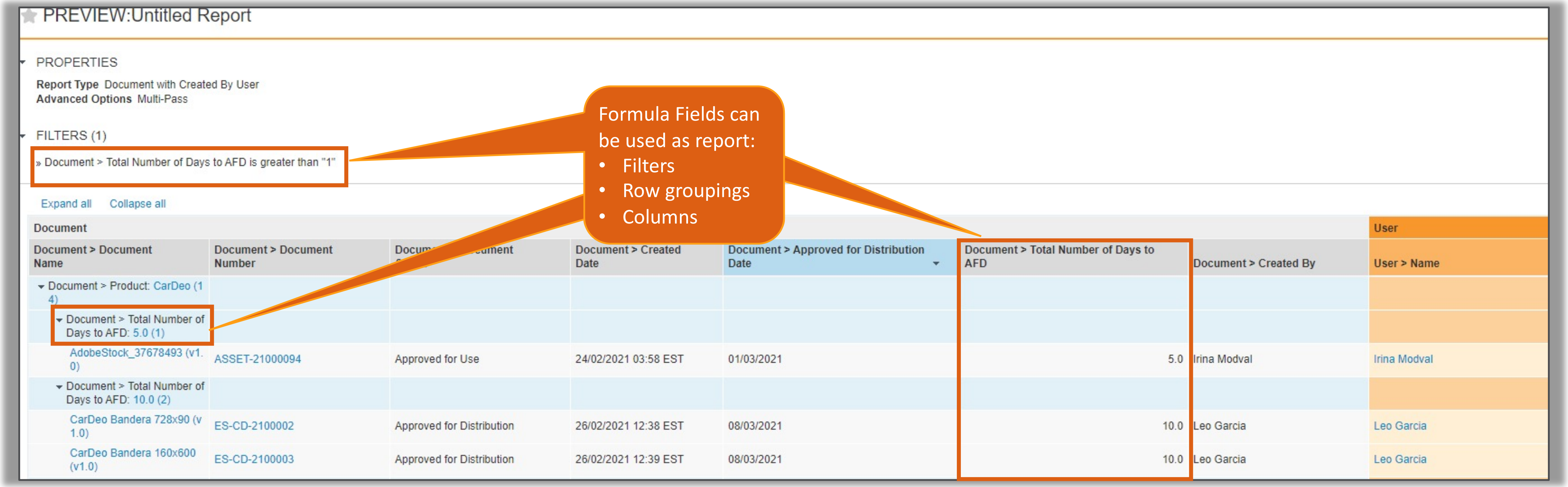
Formula Fields in Multi-Pass Reports



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							User
Document > Document Name	Document > Document Number	Docum ument	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

- 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

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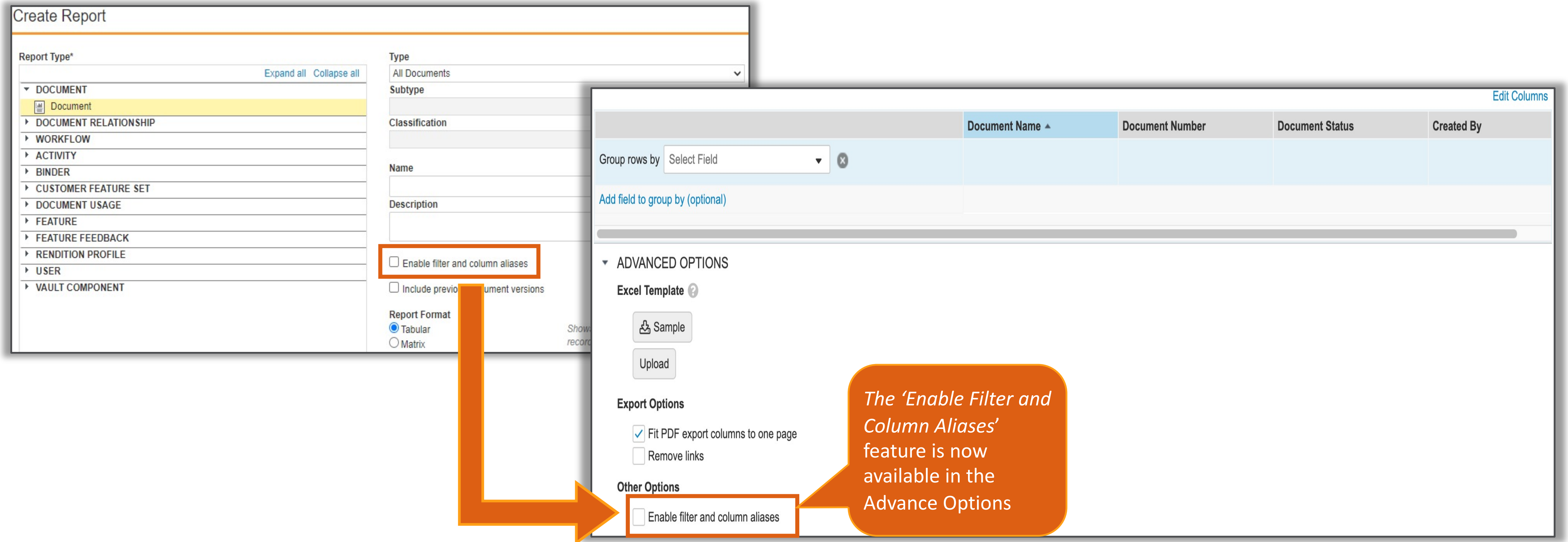
Enable Filter & Column Aliases Flag Moved to Report Builder Page

- 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



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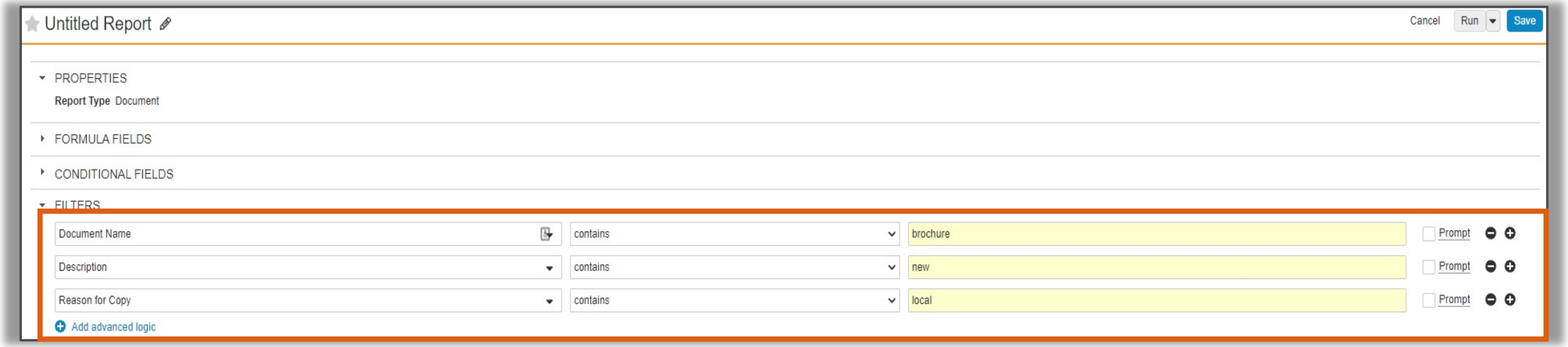
Increase Contains Operator Limit per Report

- 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



- 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
Document Usage	Document Usage with 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
Workload per Reviewer	Workflow with Document	workload_per_reviewer__c		Tasks	Irina Modval
Claims by Category	Claim Targets with Claim	claims_by_category__c			Irina Modval

Report Views

+ Create Search Columns

Name	Report Type	API Name	Description	Tags	Created By
Document	Document	document_view_standard__c			System
User	User	user_view_standard__c			System

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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

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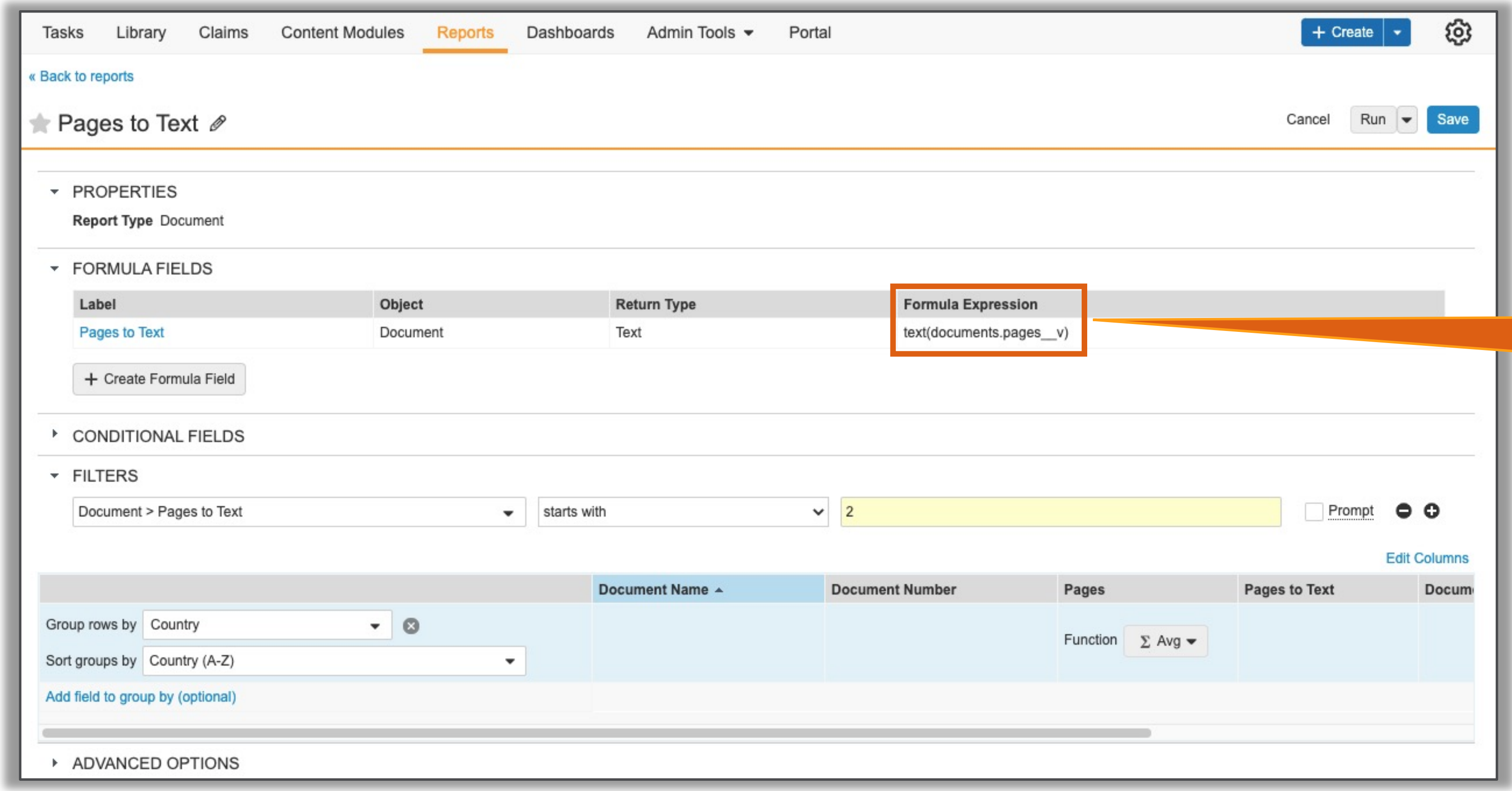
Text () Function Accepts Number Without Format

- 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



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

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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

Veeva Vault

Your Vault Configuration Report is in the queue

Component updates are still being processed on this Vault and your configuration report request is in the queue. Once all component updates have been processed, the configuration report will be generated and another notification will be sent.

Details:

- Include Vault Settings: True
- Include Document & Binder Templates: True
- Include Inactive Components: False
- Suppress Empty Results: False
- Include Components Modified Since: N/A
- Output Format: Excel_Macro_Enabled

This message is automatically generated by Veeva Vault and sent from the Platform Sandbox vault wac-sbx-platform-sandbox.vaultdev.com. If you think it was sent incorrectly, please contact your Vault administrators. To ensure delivery to your inbox, please add vault-emails@veeva.com to your address book.

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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

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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 mmuray@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: mmuray@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

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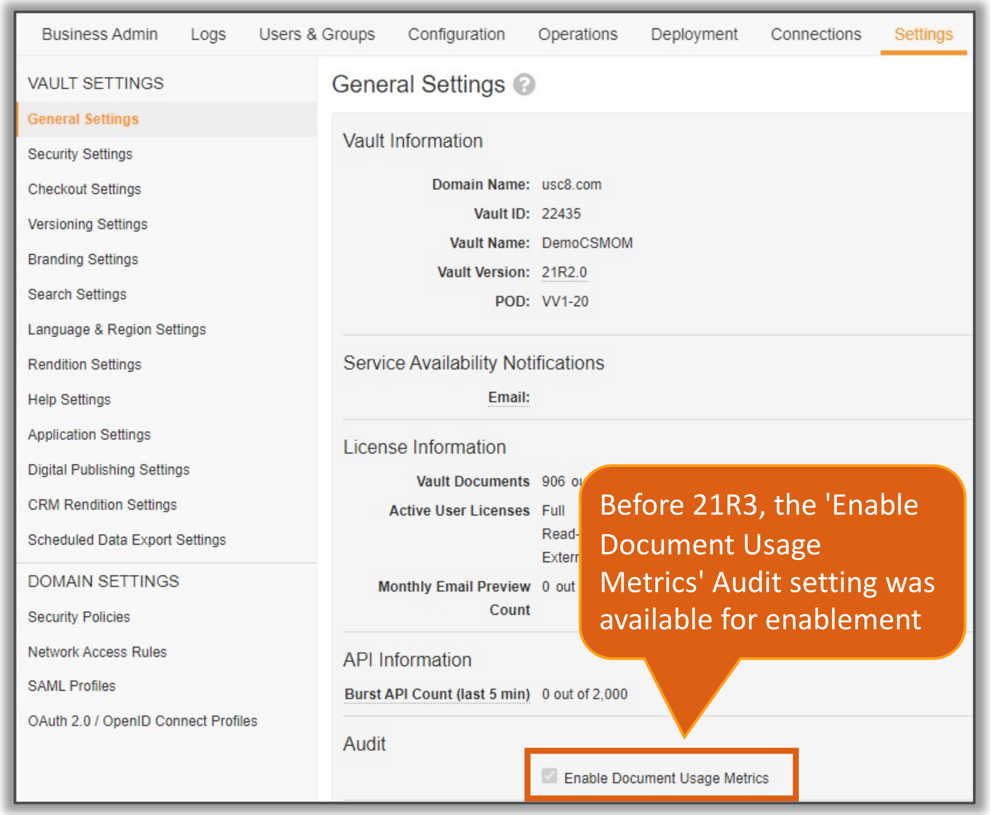
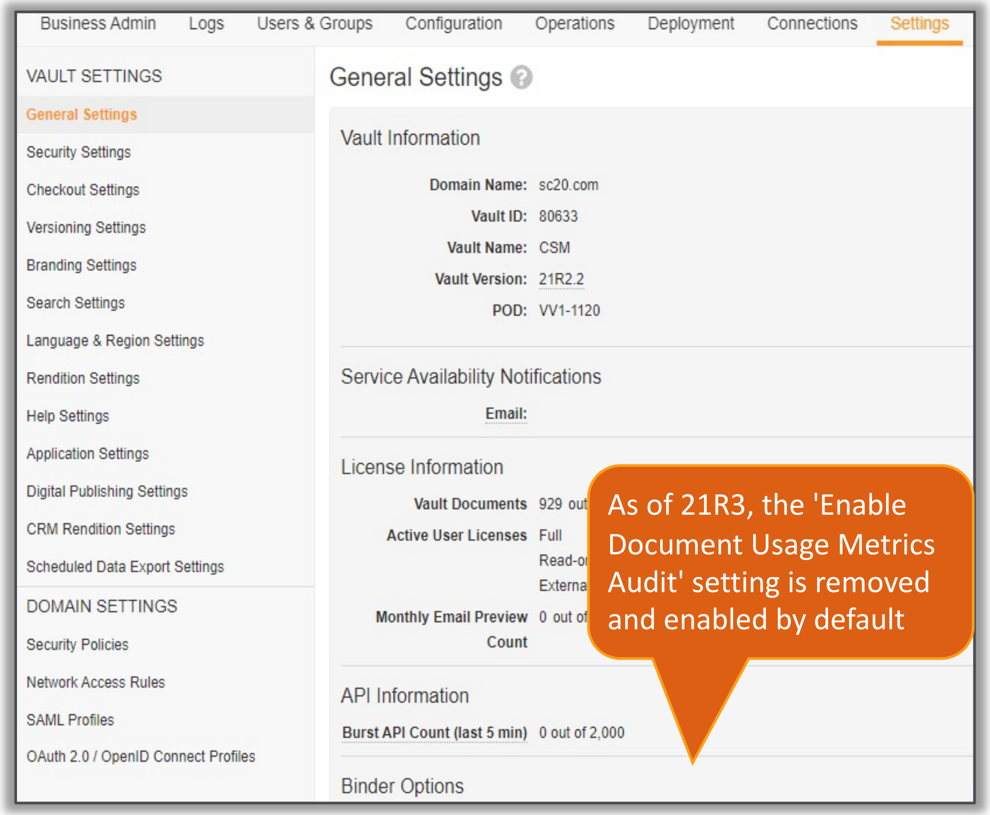
Remove Enable Document Usage Metrics Flag

- 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]





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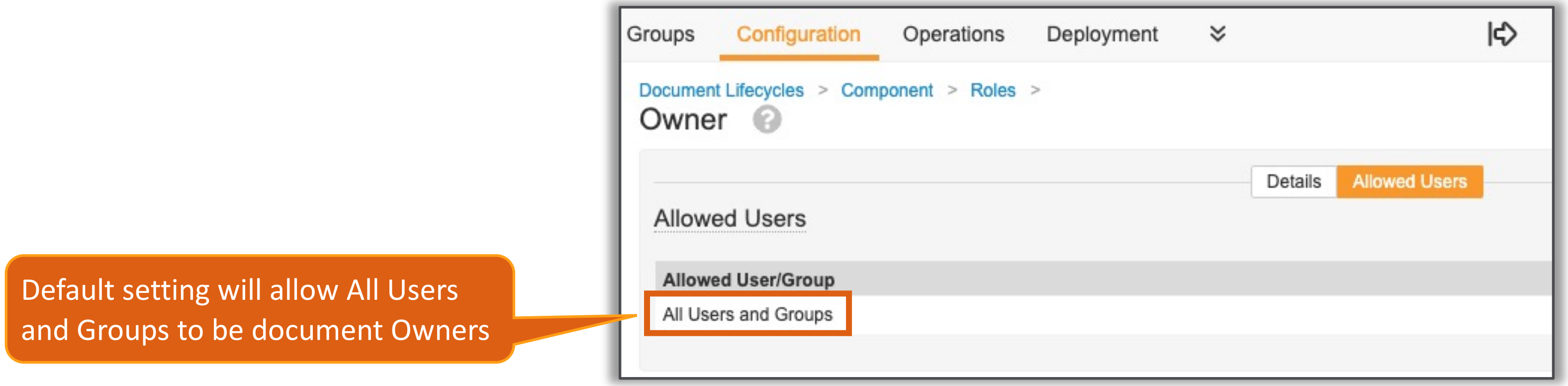
Allowed Users When Assigning New Document Owner

- 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

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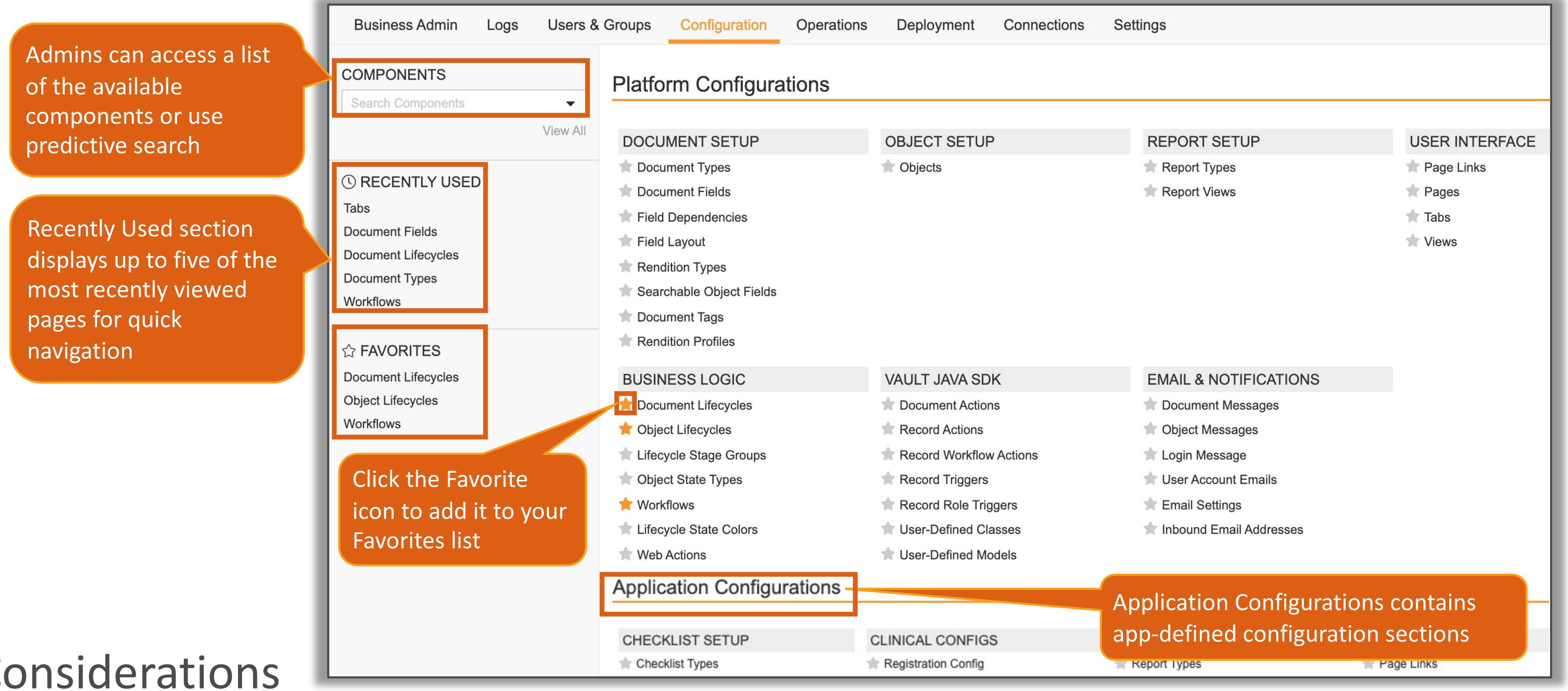
Admin Configuration Tab Updates

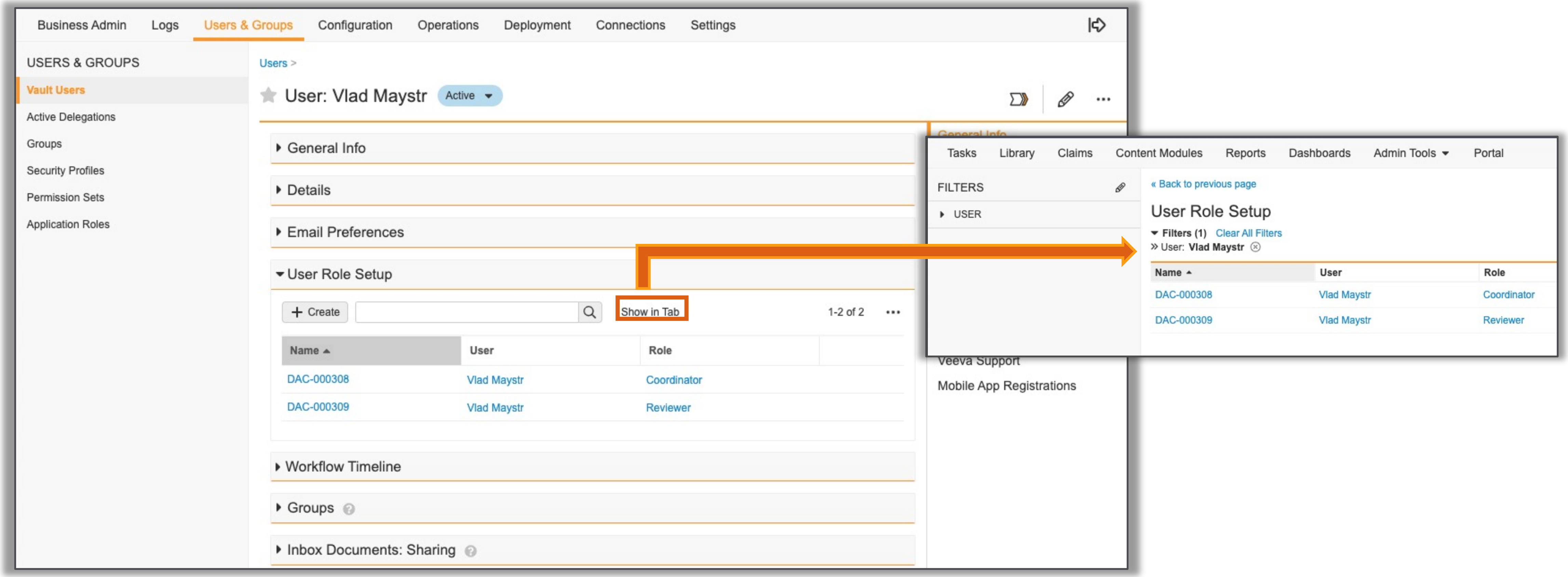
- Configuration tab has a new appearance and usability improvements to increase ease of navigation across a large number of components



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

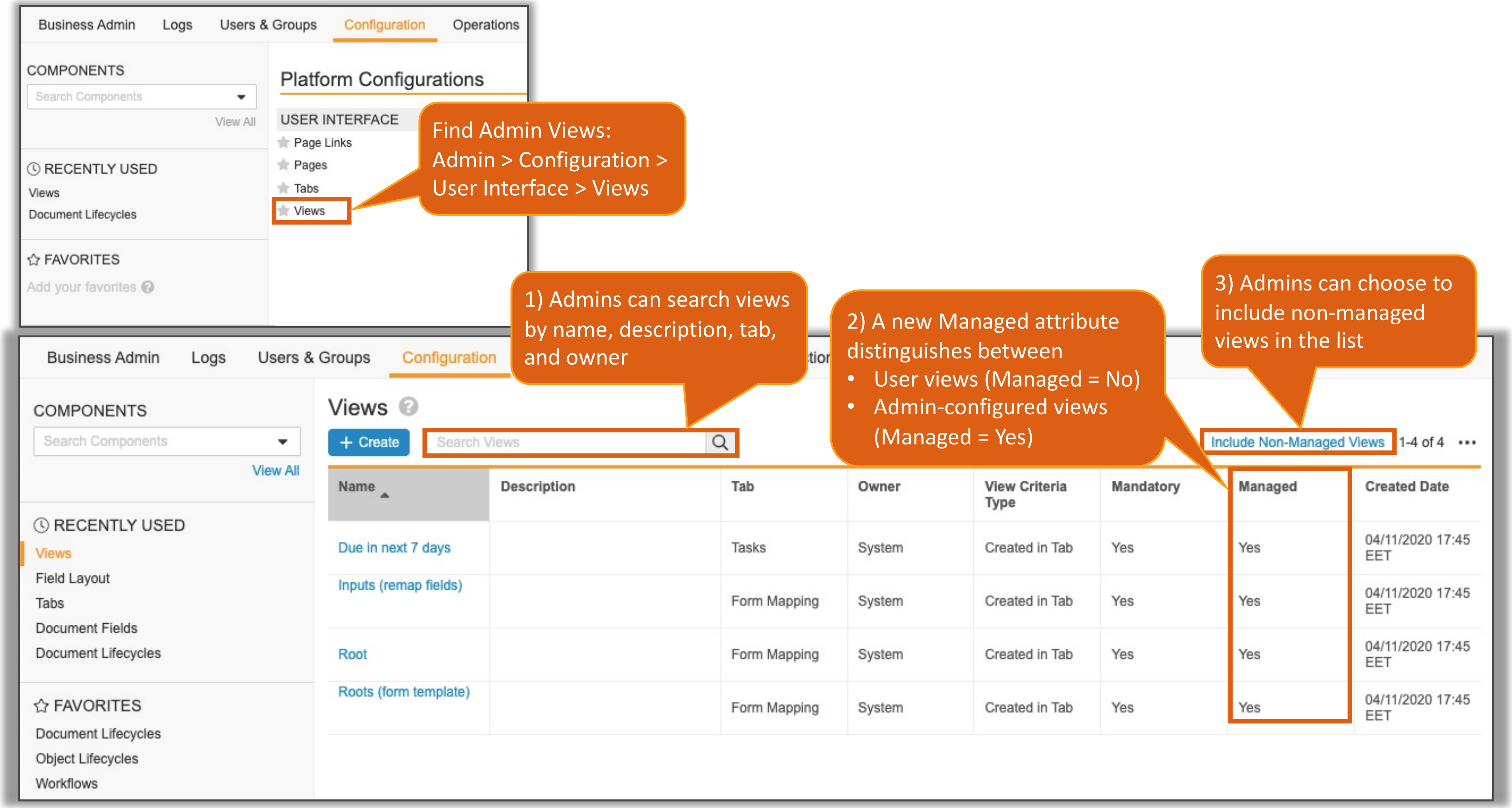
Details Page for Vault Users: Show in Tab Action on Related Object Sections

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



Saved View Admin

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



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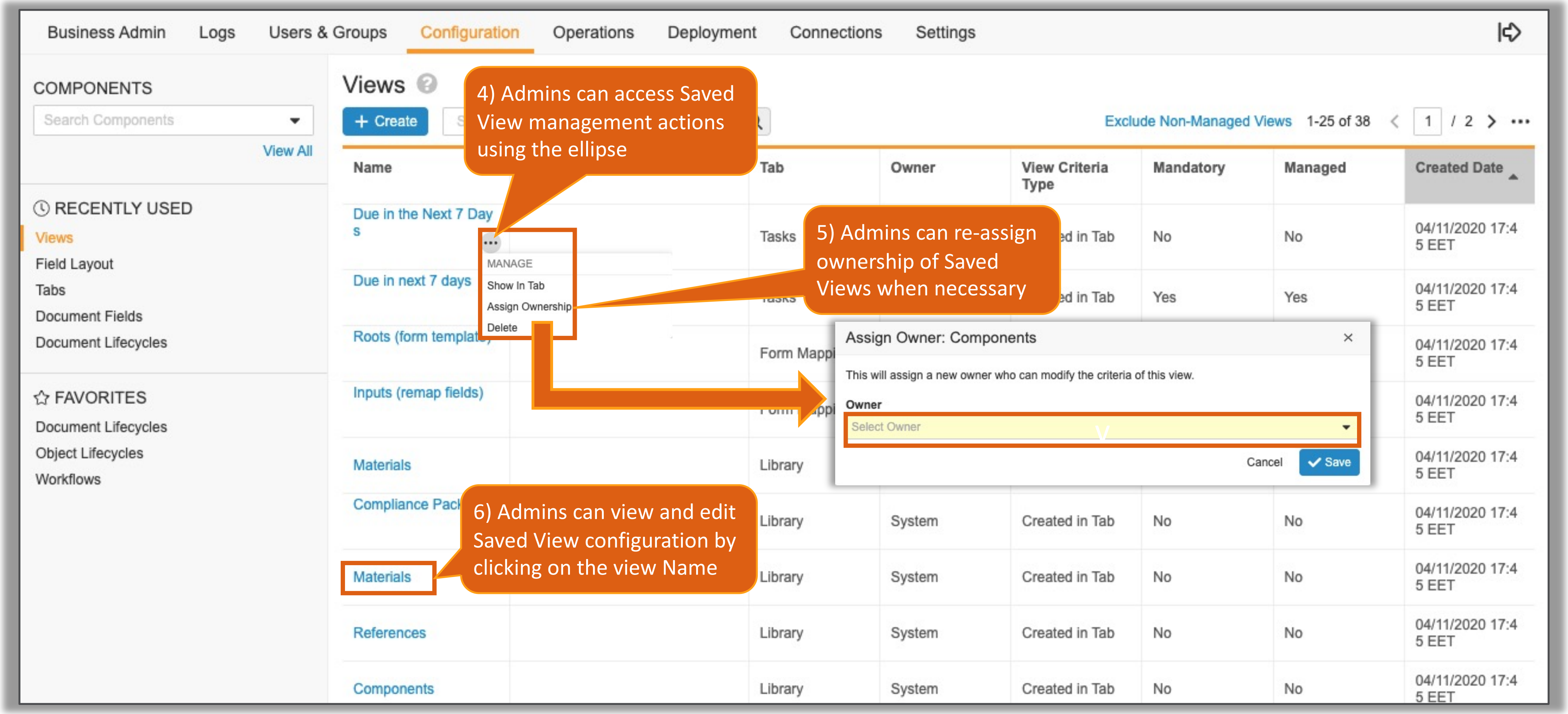
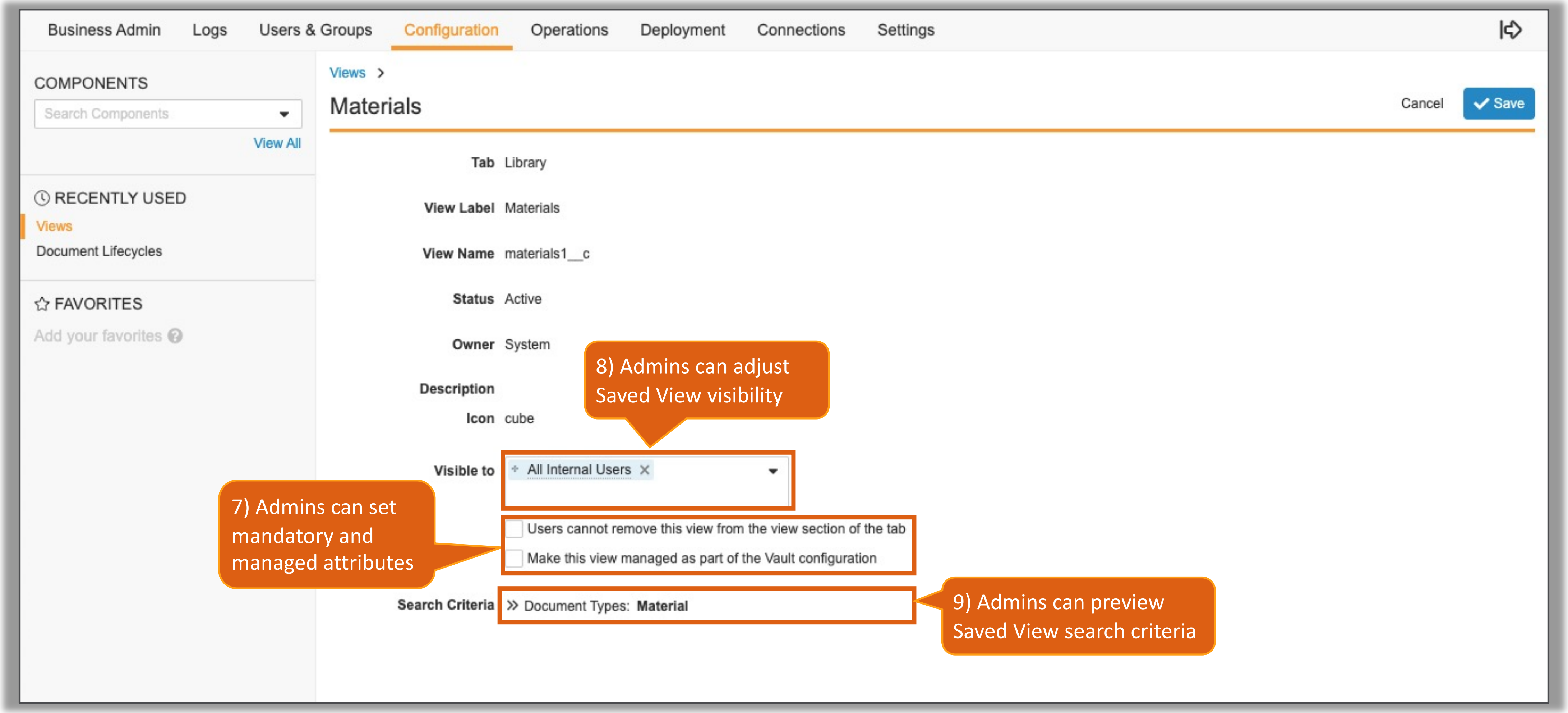
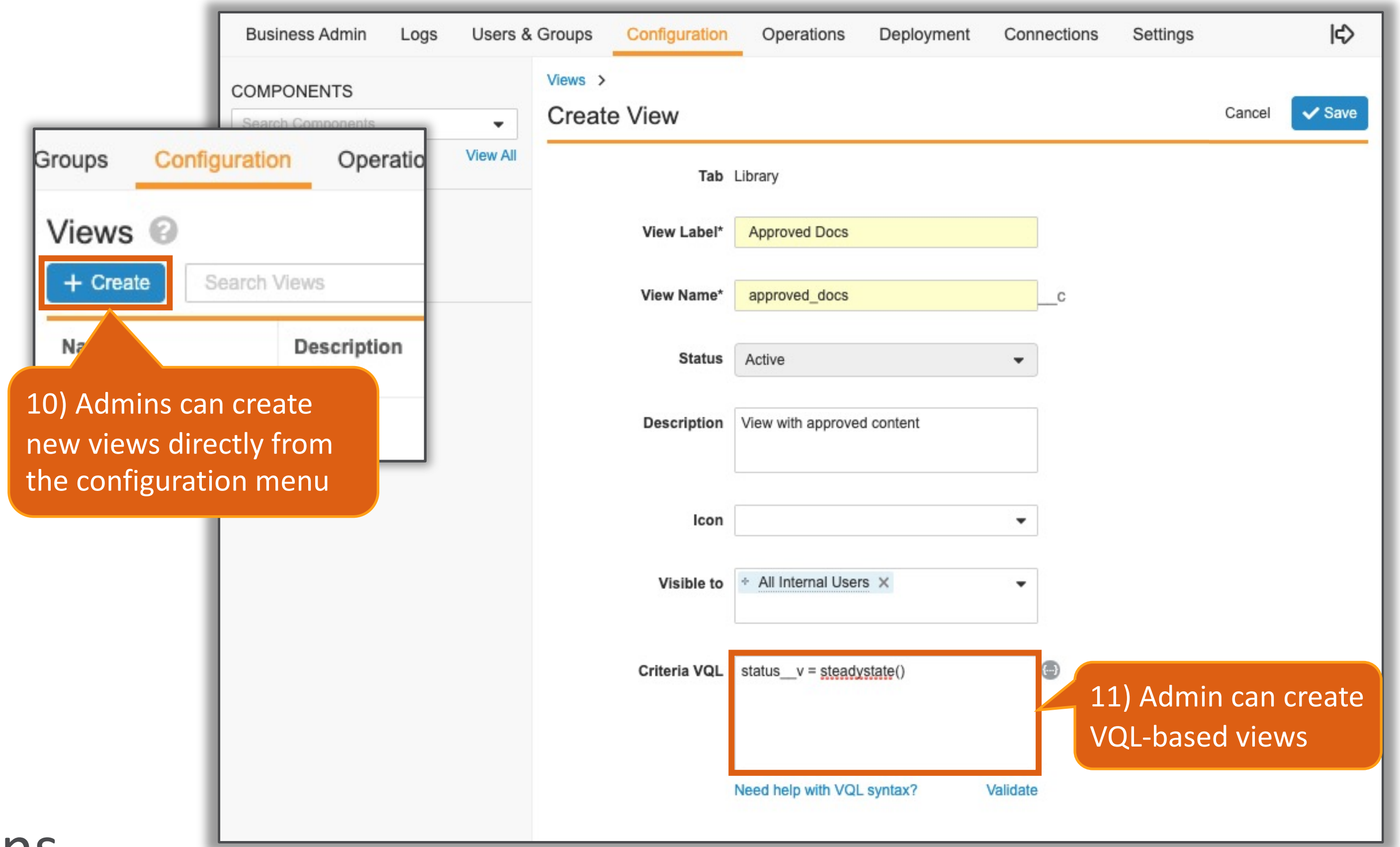
Saved View Admin



Saved View Admin



Saved View Admin



- 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.

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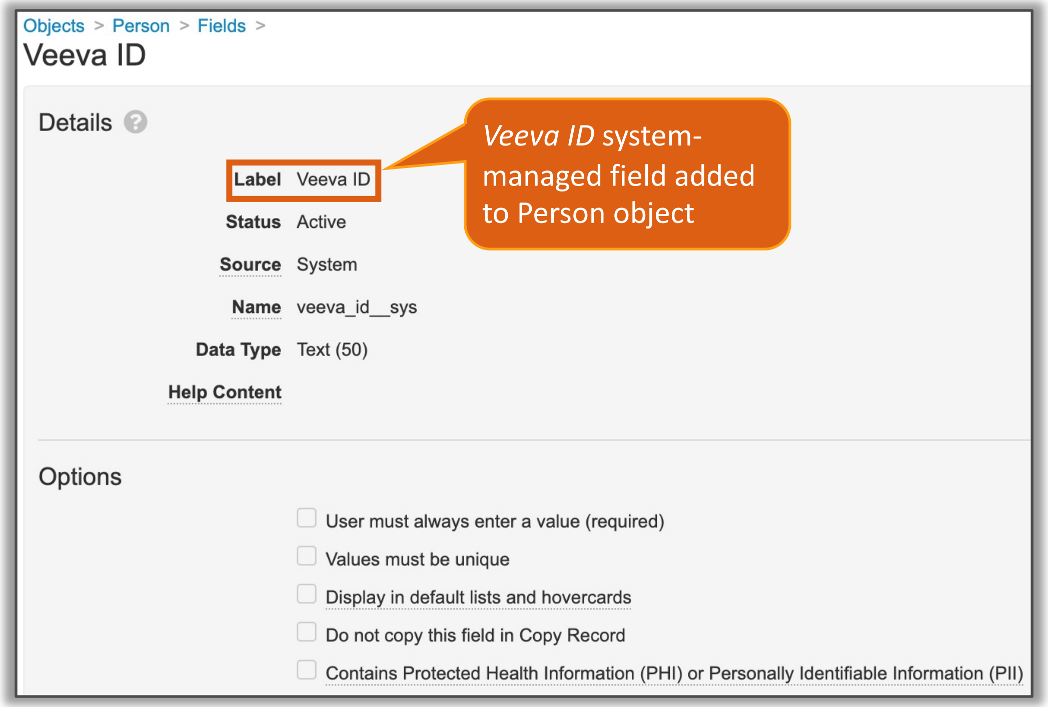
Veeva ID Field on Person Object

- A *Veeva ID* (veeva_id__v) text field is now added to the Person object for support of cross-product integrations



- 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

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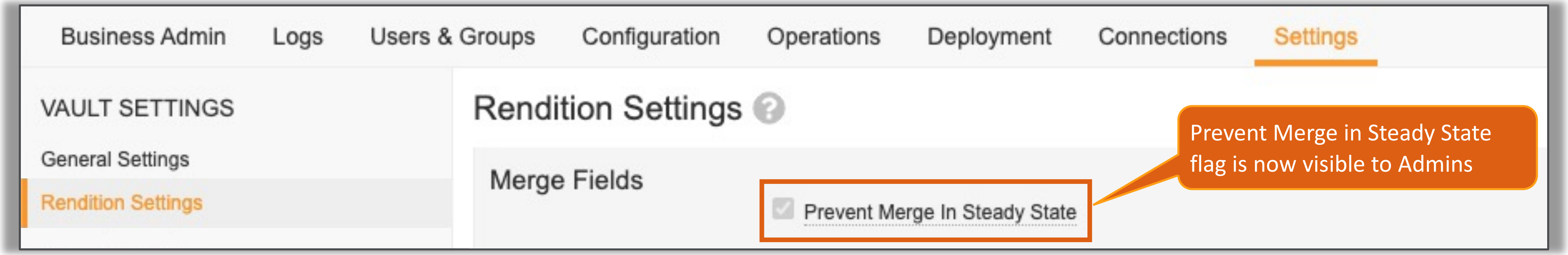
Prevent Merge in Steady State Rendition Setting

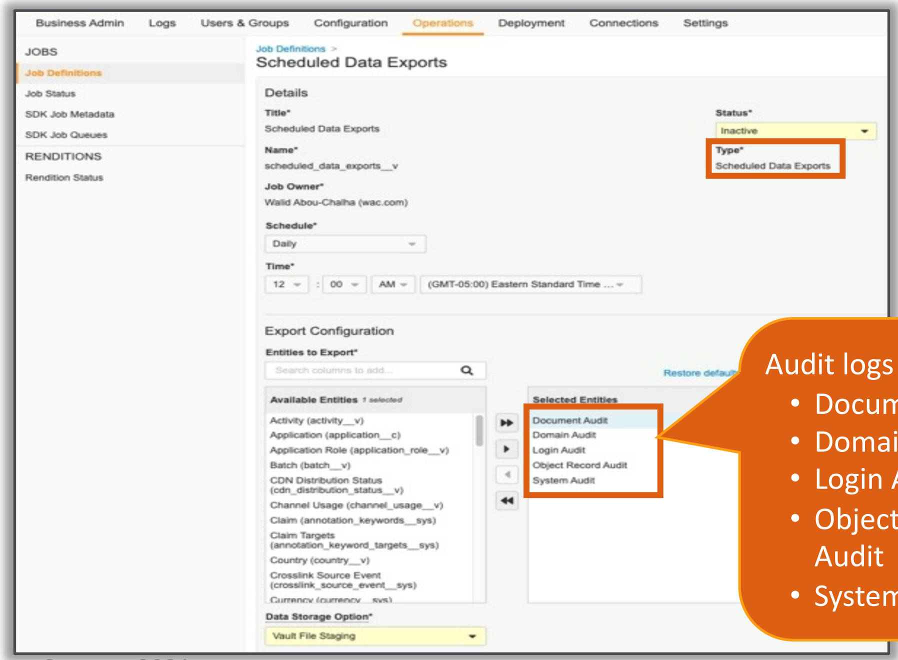
- Prevent Merge in Steady State setting is now accessible by Admins
  - This setting disables the auto merging of documents when the document is in a steady state in order to preserve the final form of documents that have been finalized and approved



- 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

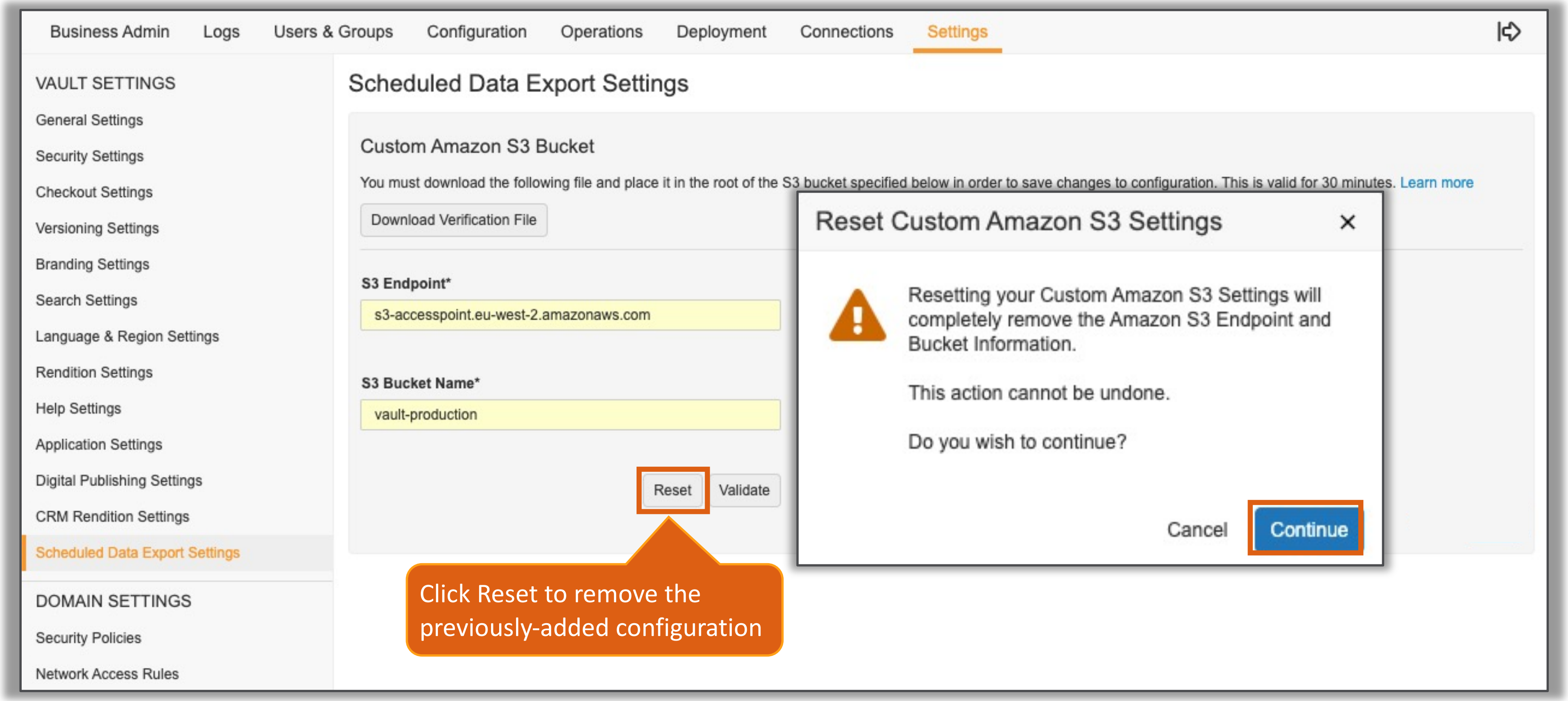
- You can now include audit history data in scheduled data exports
  - Supported audit logs include:
    - System Audit, Login Audit, Document Audit, Object Record Audit, and Domain Audit
- This feature will enable customers to load their Vault audit data into their enterprise data lakes, data warehouses, 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

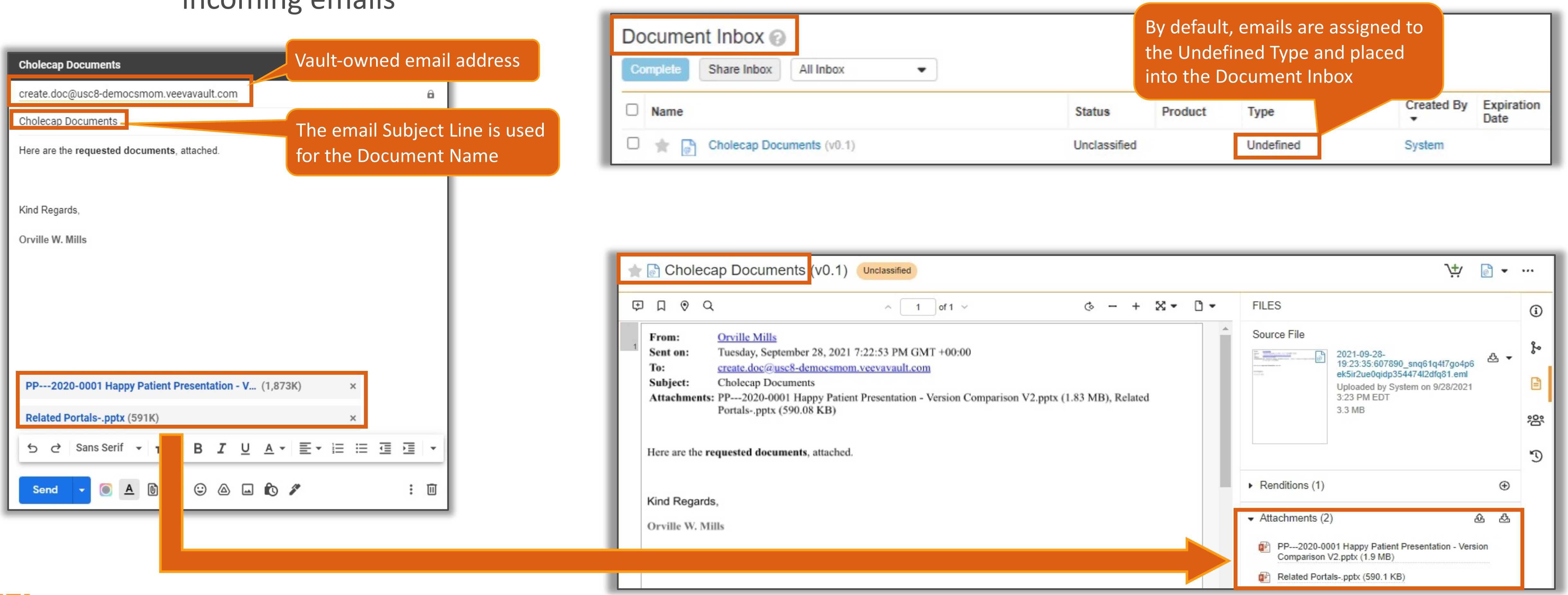
Scheduled Data Exports: Reset Custom Amazon S3 Settings

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



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



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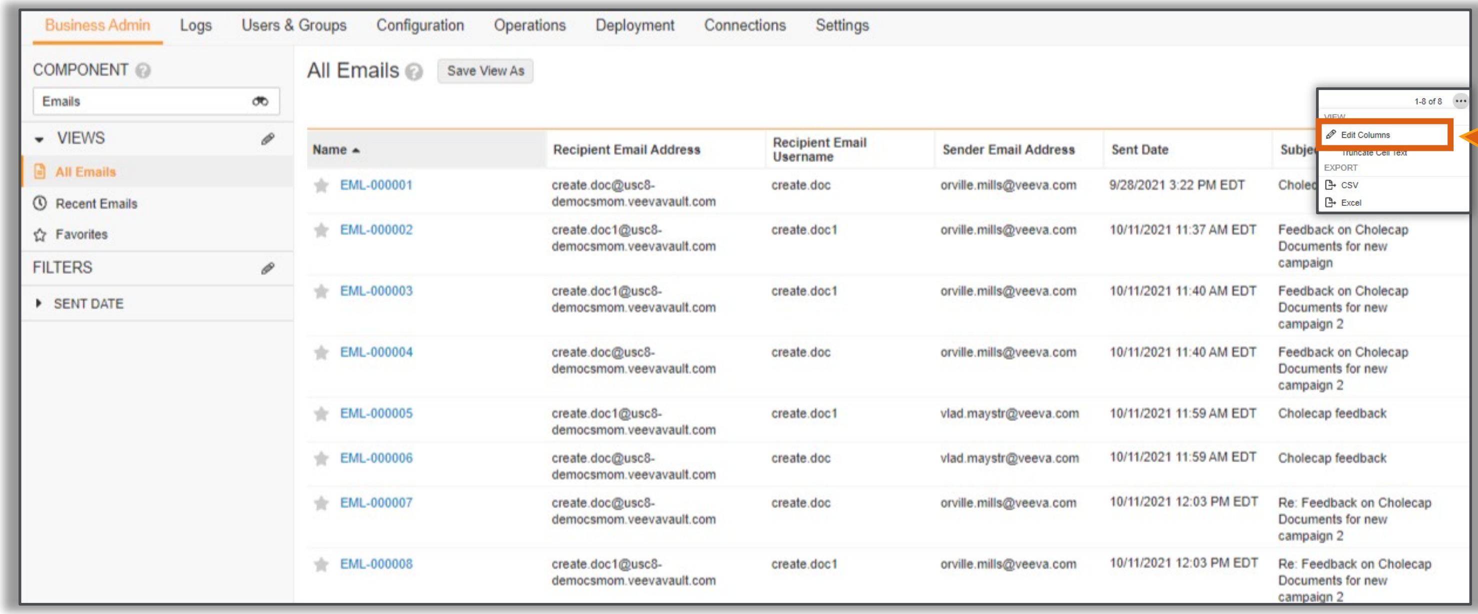
Email to Vault

- 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

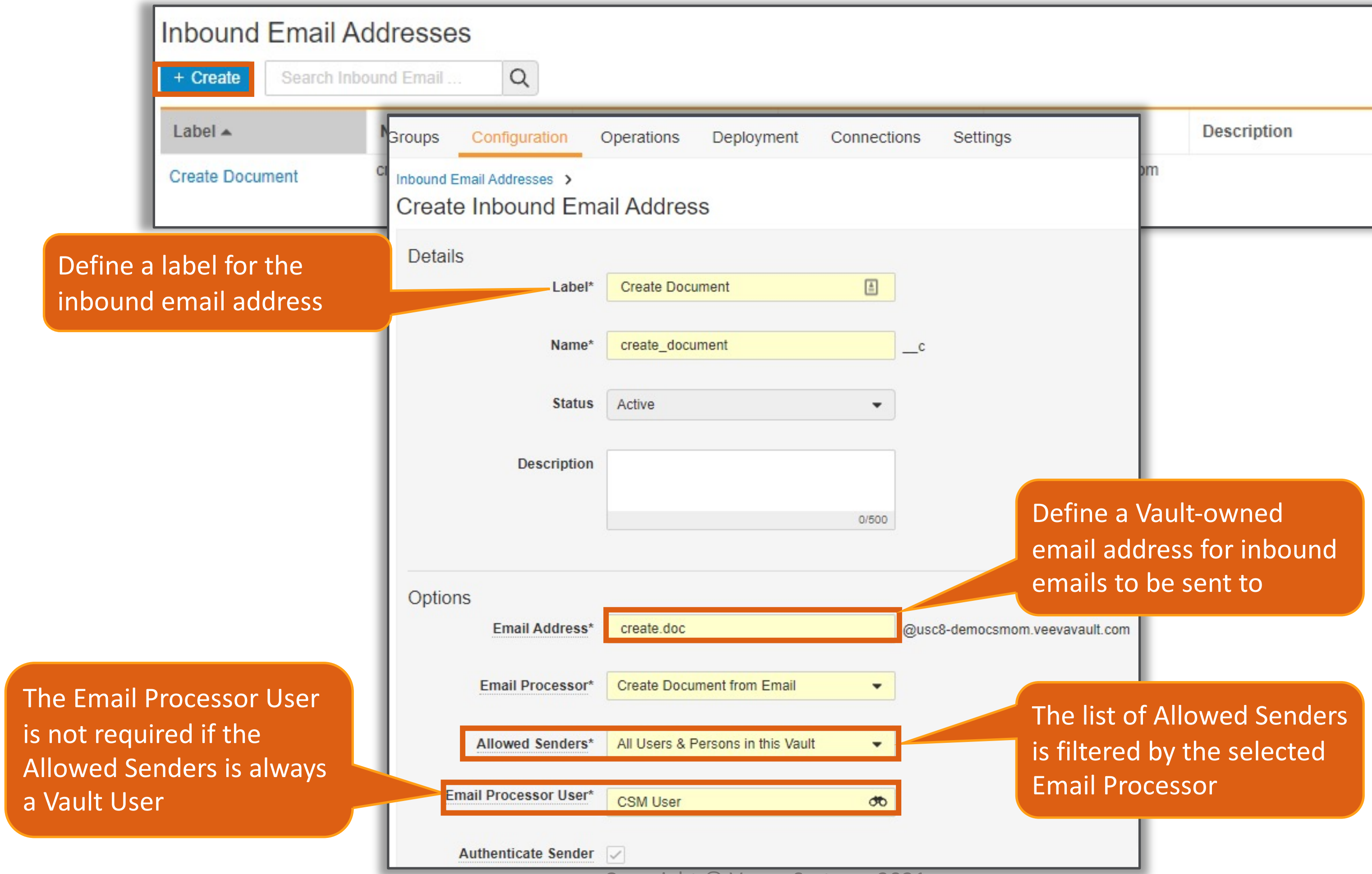


The Inbound Email Addresses listing page provides a help link and the ability to edit columns

  - Learn more about Configuring Email to Vault

Email to Vault

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



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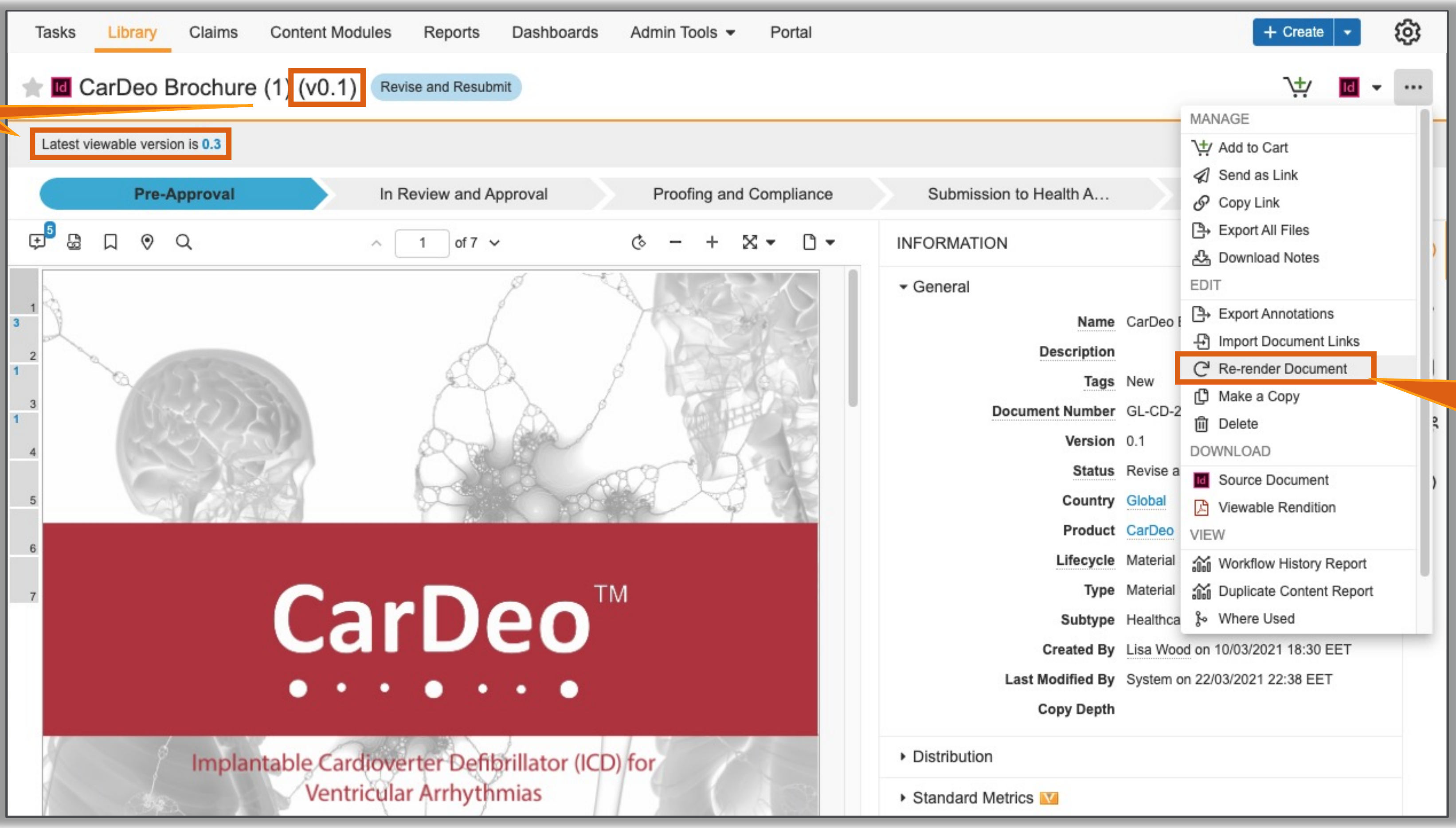
Re-Render Previous Rendition Versions

- 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



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

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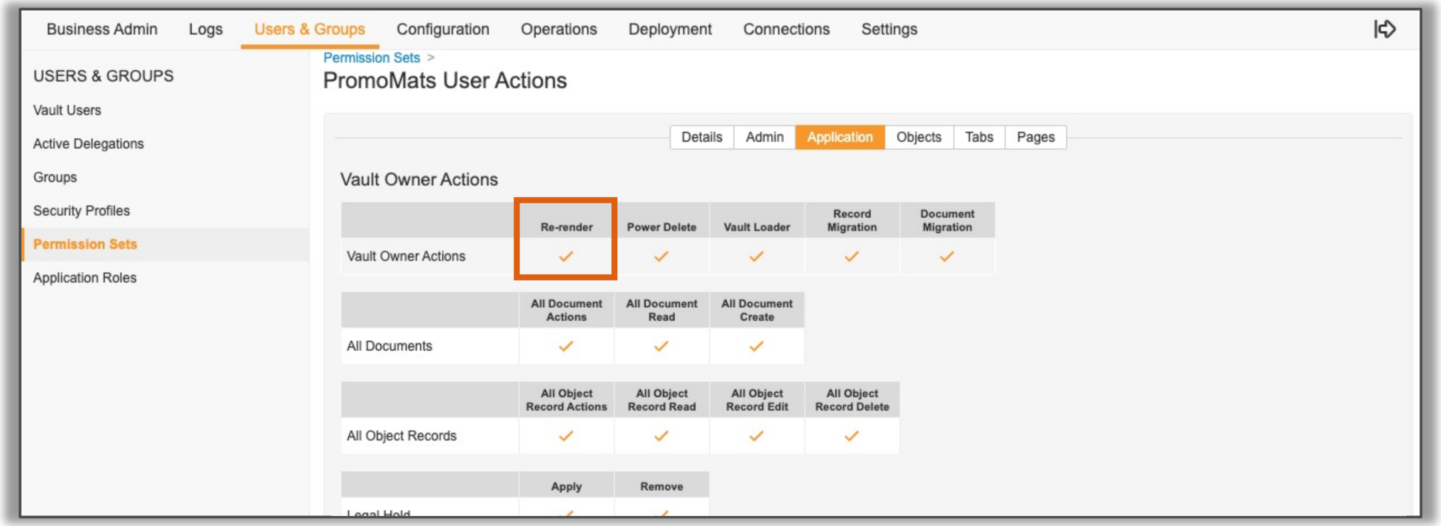
Re-Render Previous Rendition Versions

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



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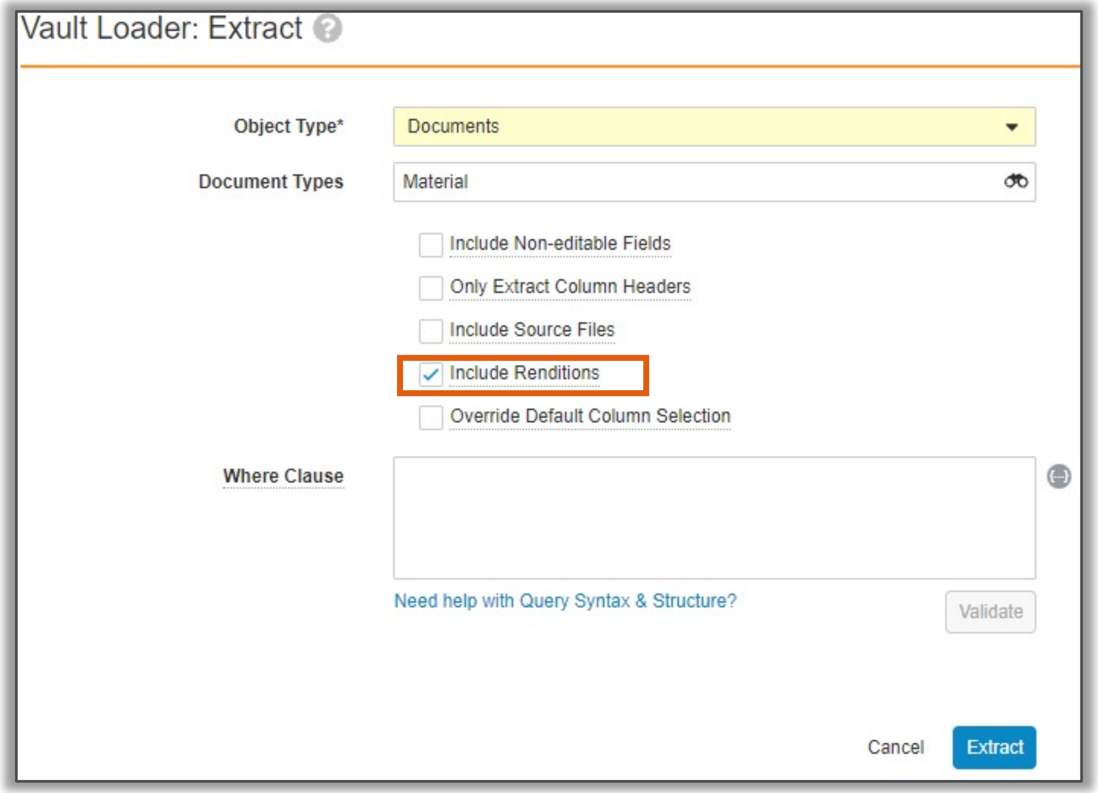
Vault Loader

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



  - Learn more about Managing Rendition Types and Creating Automated Image Renditions

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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

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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

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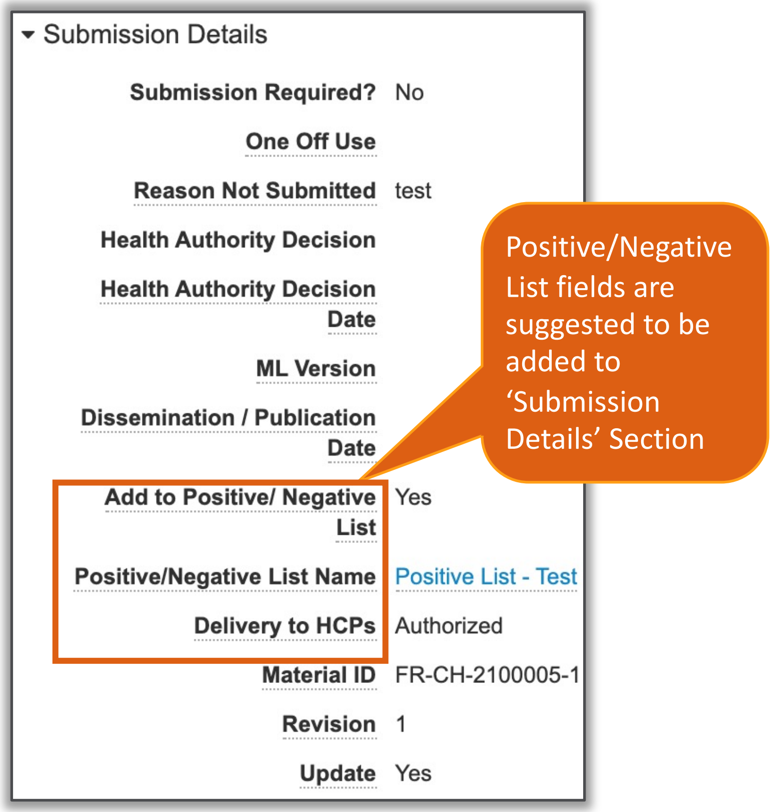
PromoMats

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



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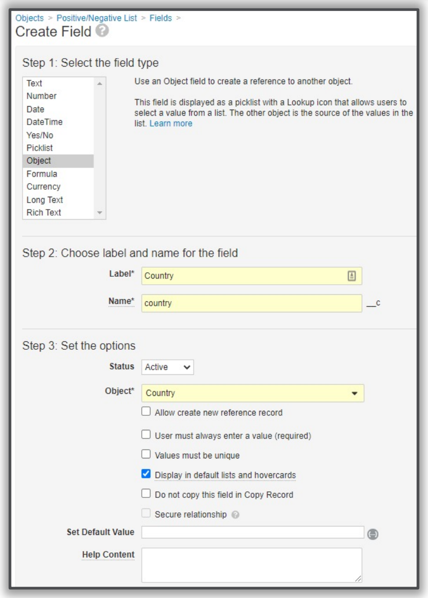
Positive / Negative Lists

- 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)]()



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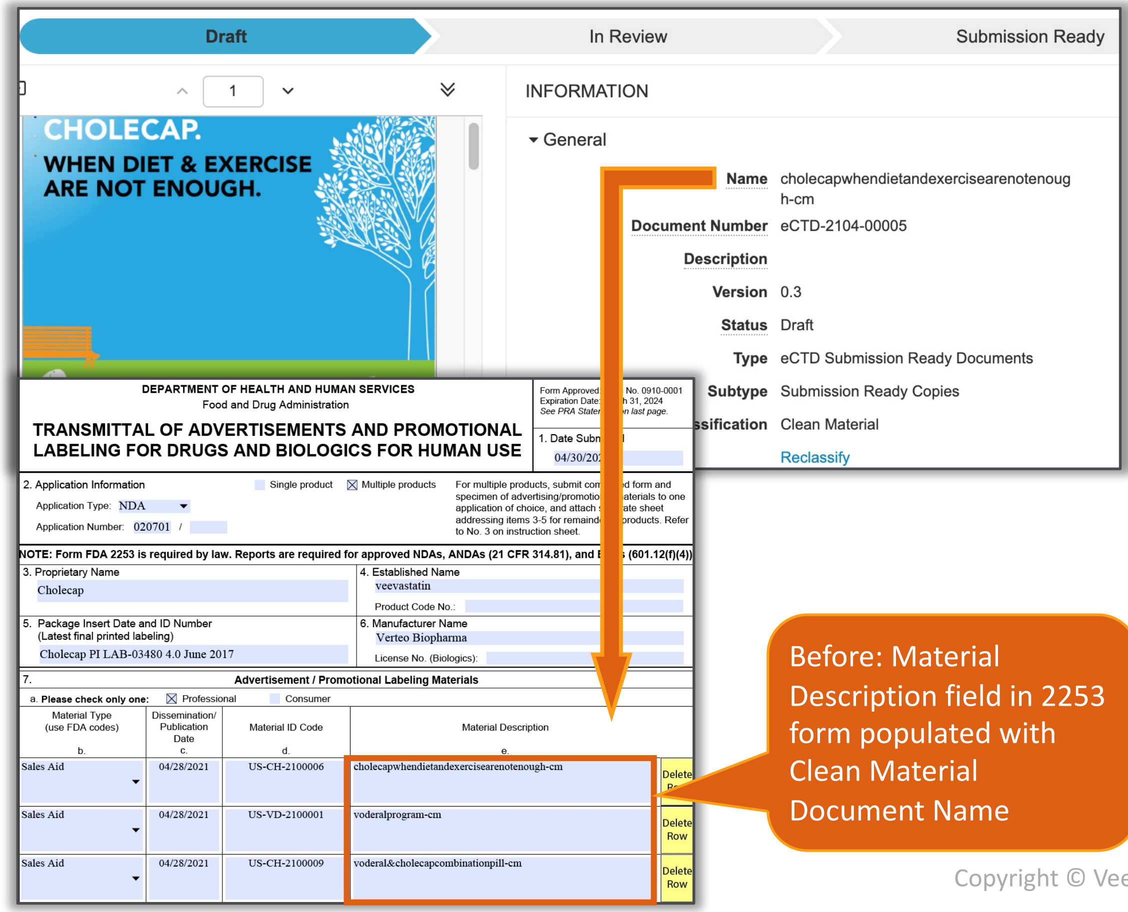
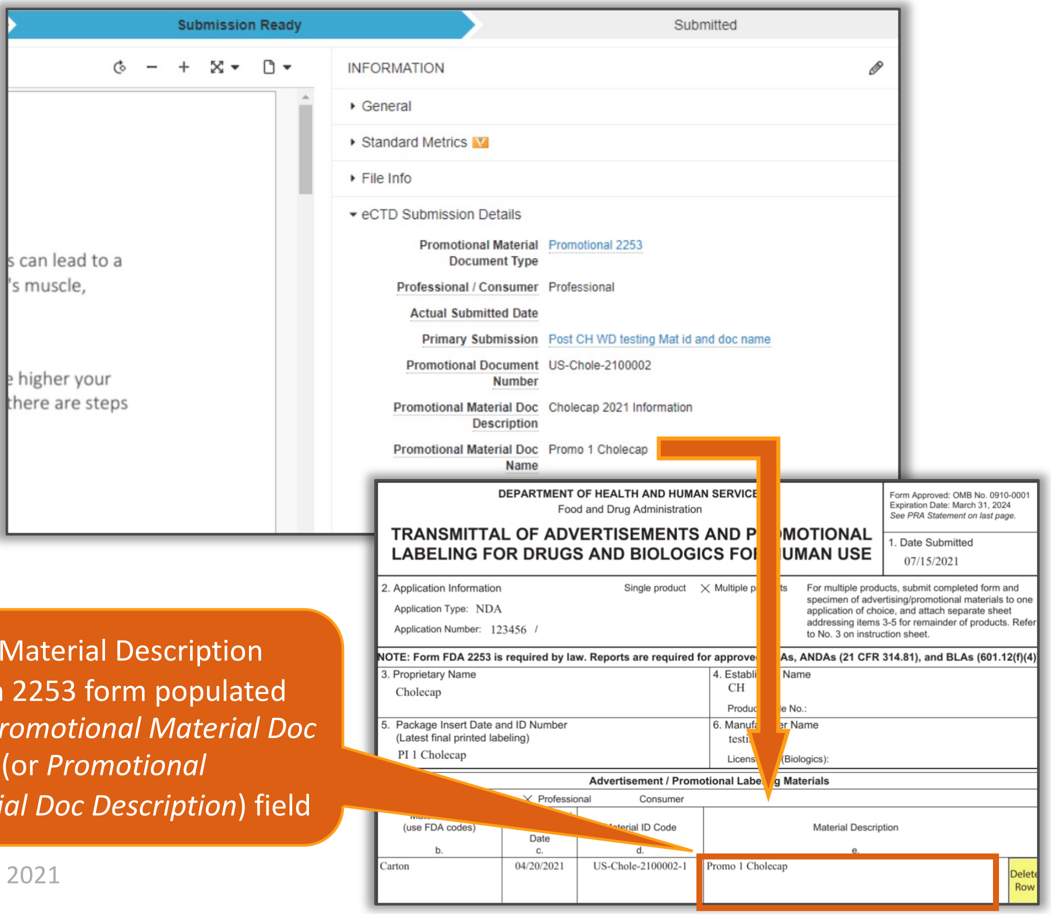
eCTD – Additional Material Information in the Binder

- 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



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

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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

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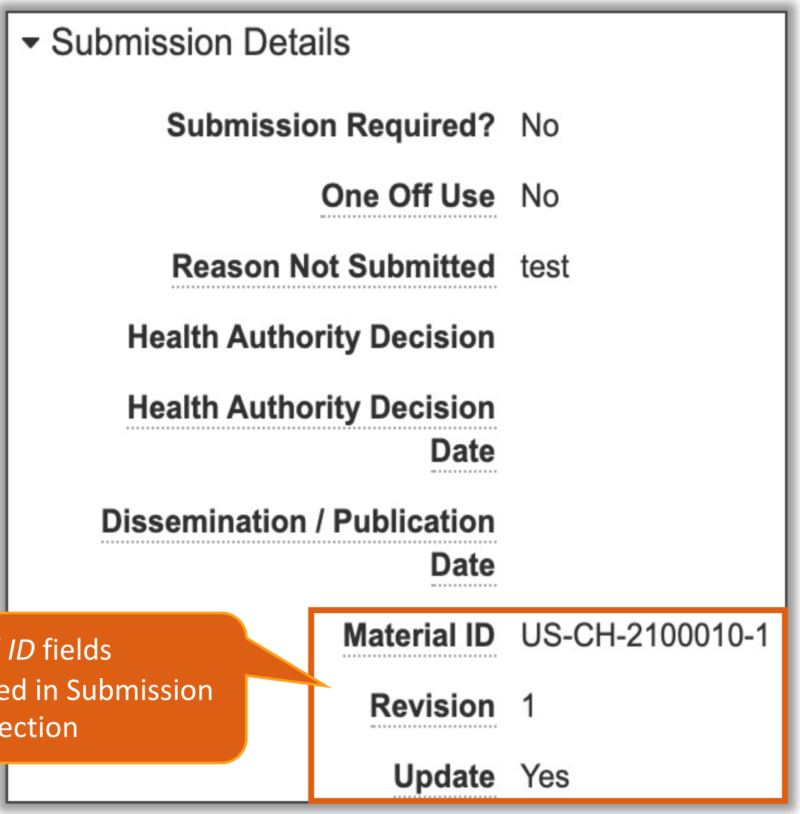
eCTD – Additional Material Information in the Binder

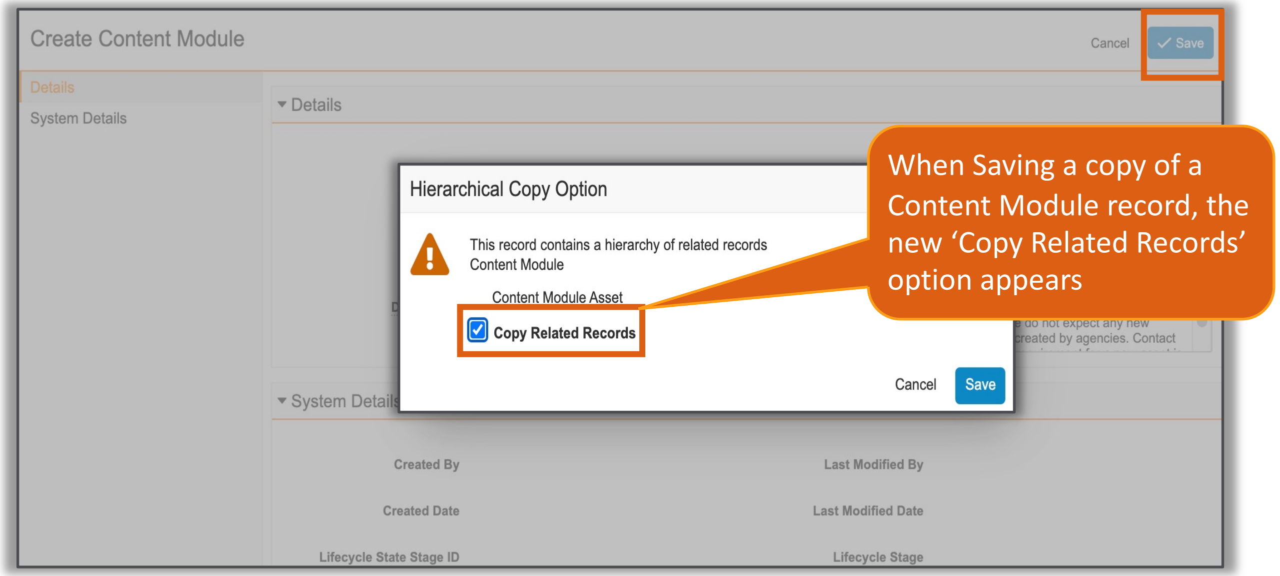
- The *Promotional Material ID* can now be added to the Annotated Label or Annotated Reference document types, allowing Vault to copy the *Material ID* from the promotional material onto these documents
- Considerations
  - Required for the PromoMats - RIM Vault Connection
- Configuration
  - Enable 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



Material ID fields configured in Submission Details section

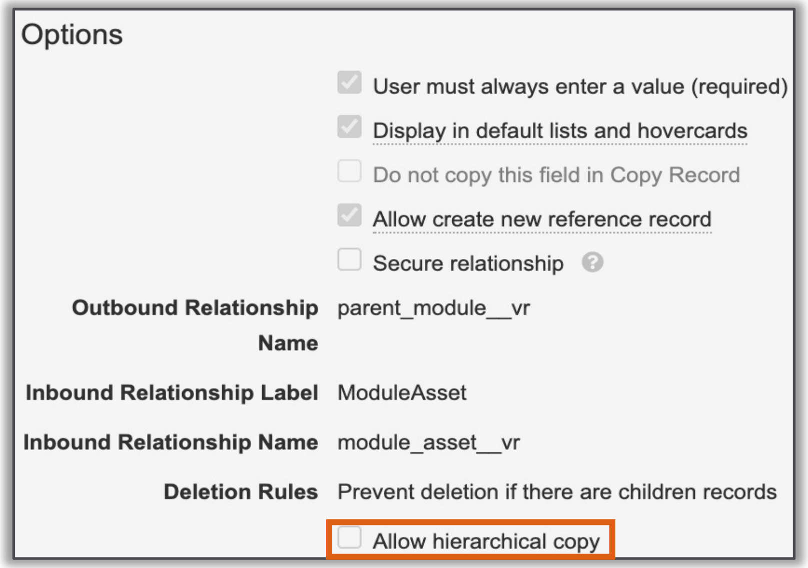
Content Modules: Hierarchical Copy

- 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*’



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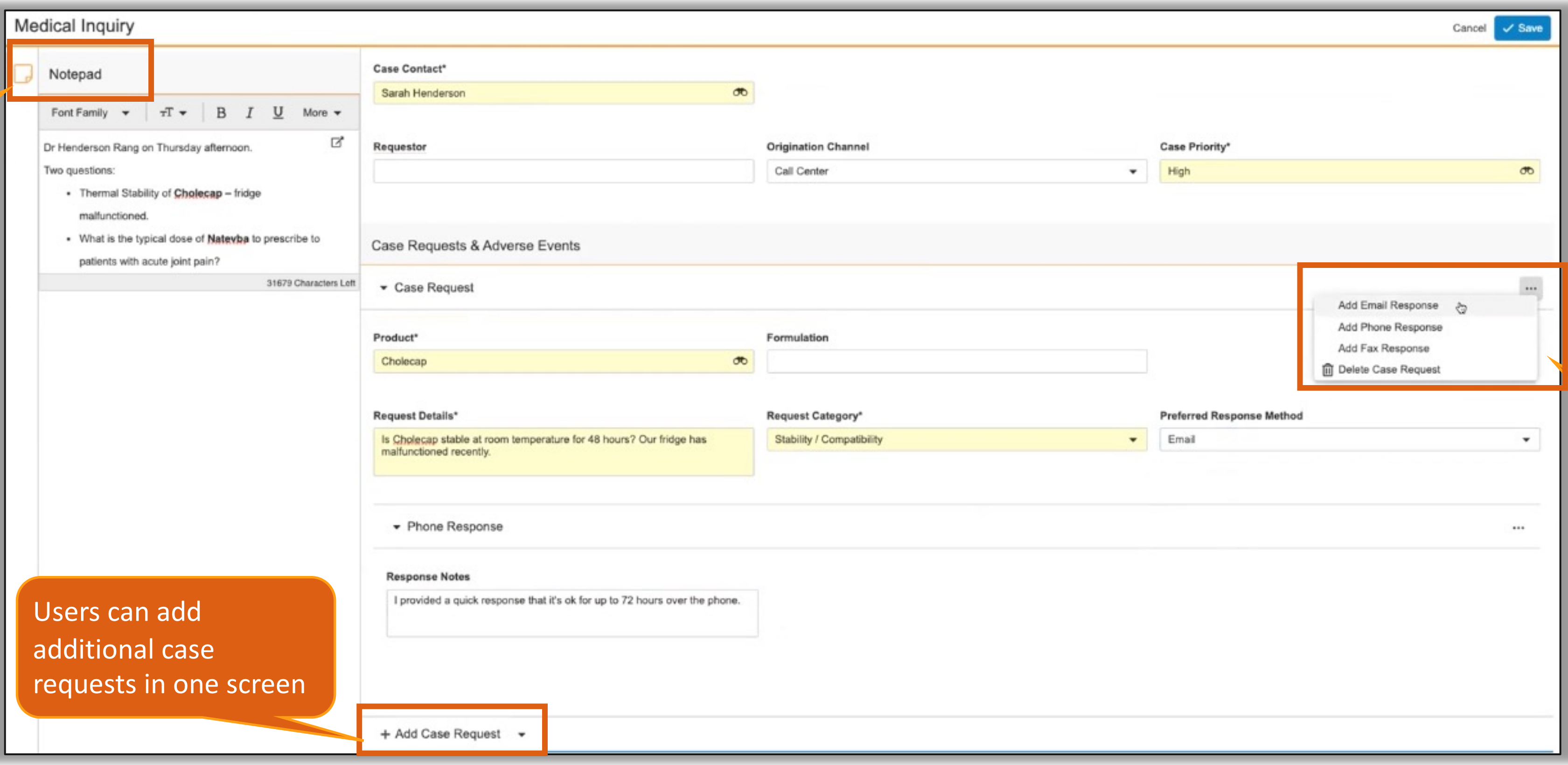
MedComms

Dedicated Medical Inquiry User Interface

- Users can now capture Multiple Case Requests, Case Responses, Adverse Events, PQCs 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

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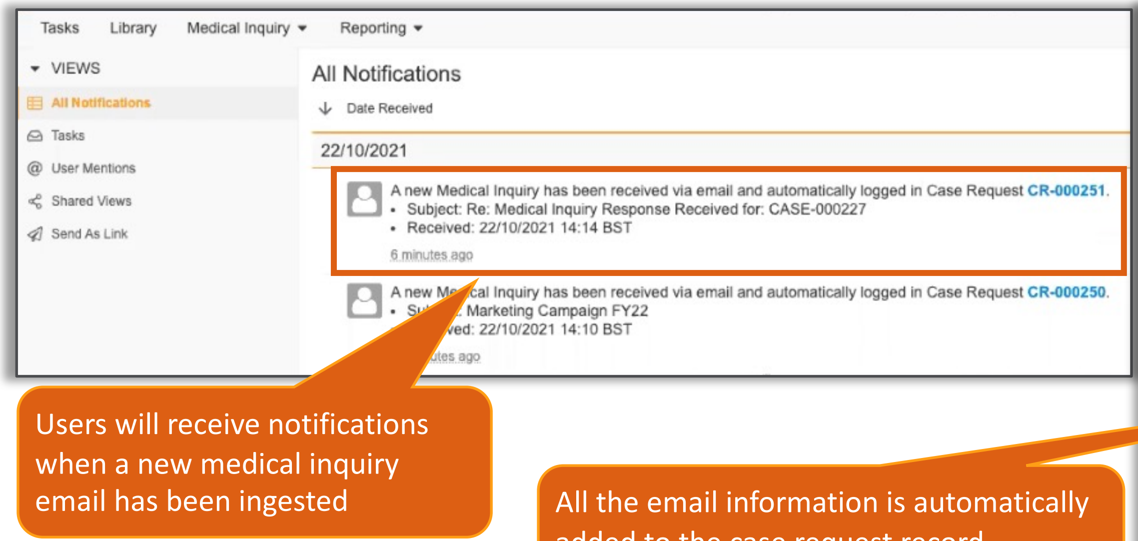
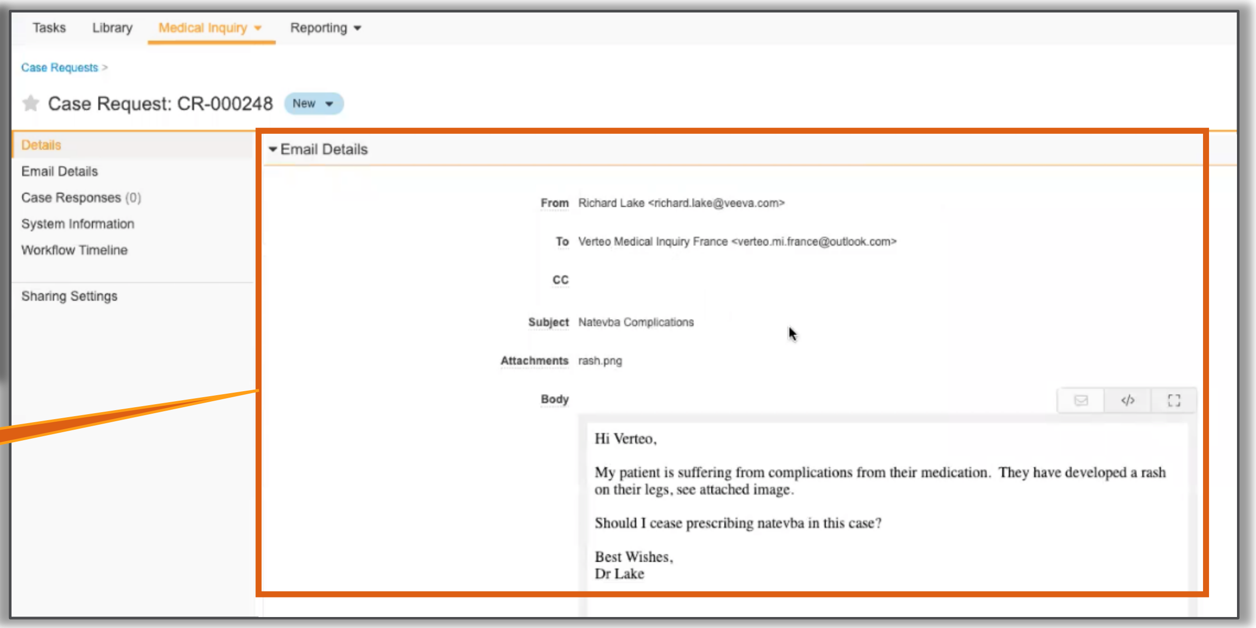
Automated Email Intake for Medical Inquiries

- 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





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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

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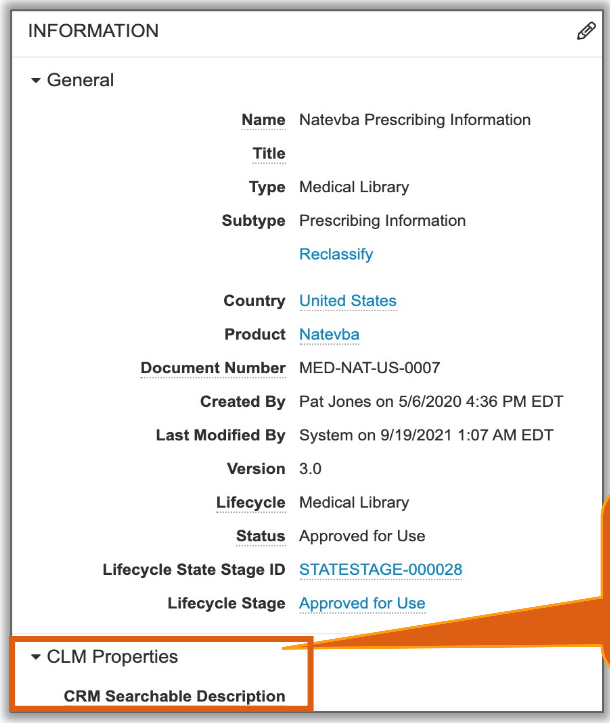
MultiChannel

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]



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

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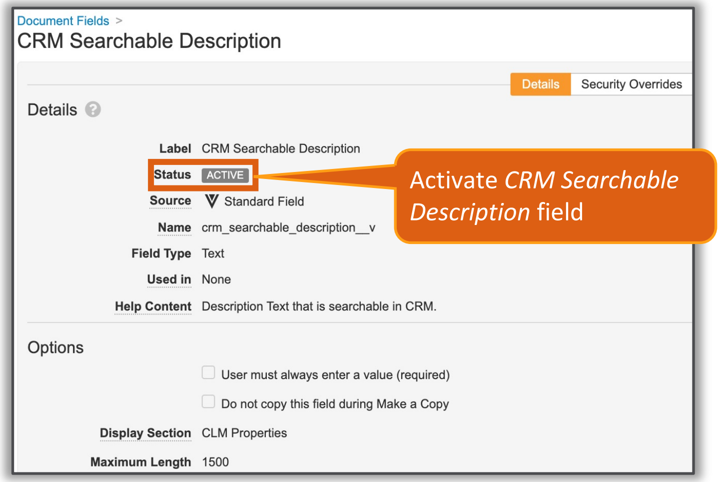
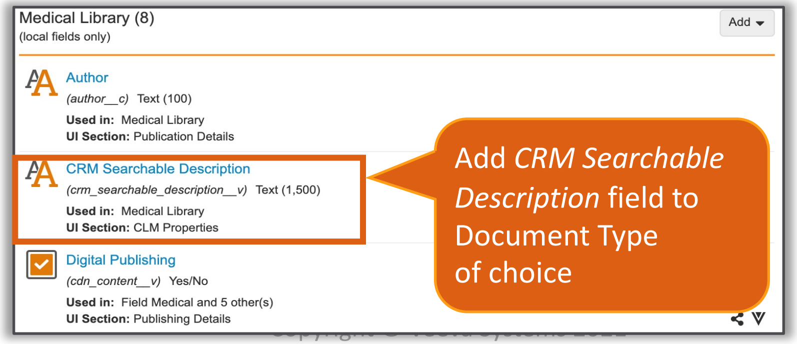
CLM Metadata Enhancements for Medical Affairs

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



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



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)

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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)

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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*

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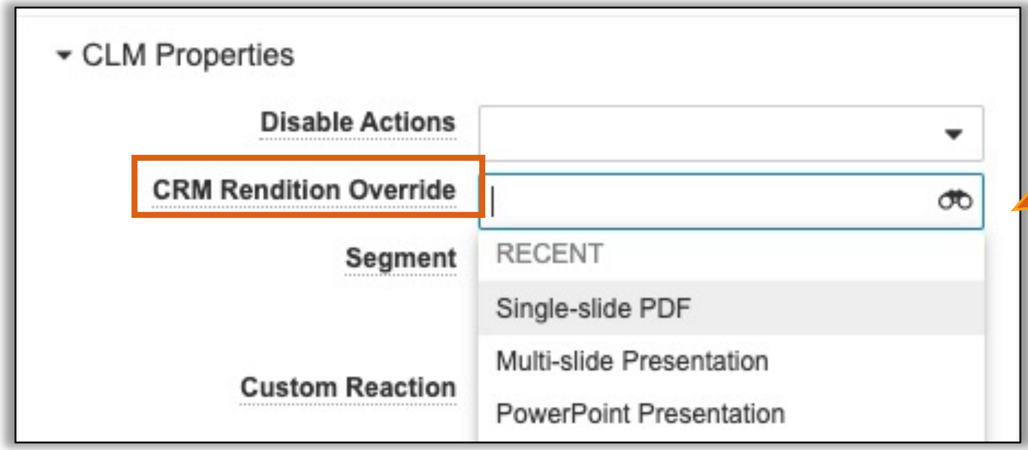
Document Level Rendition Type Selector for Single Doc Publishing for CLM Content

- 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]



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

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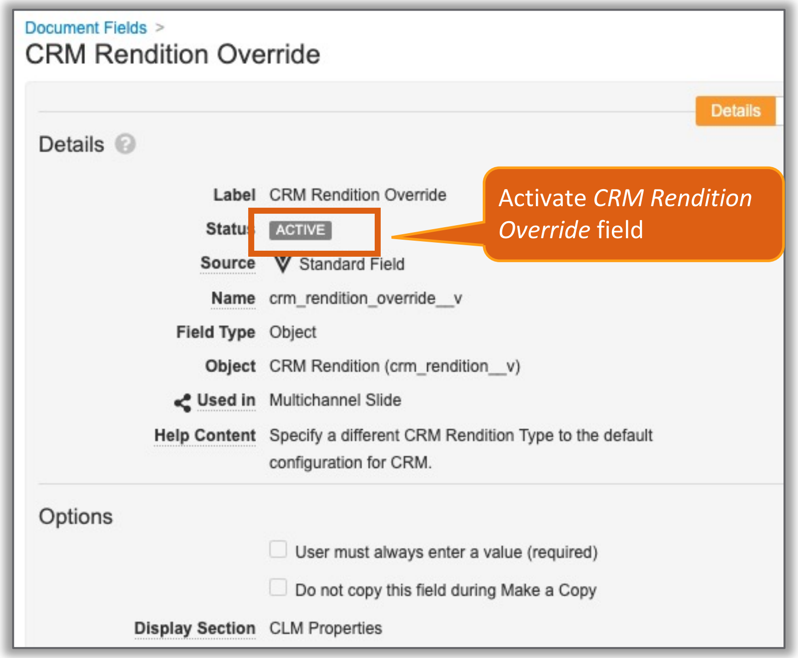
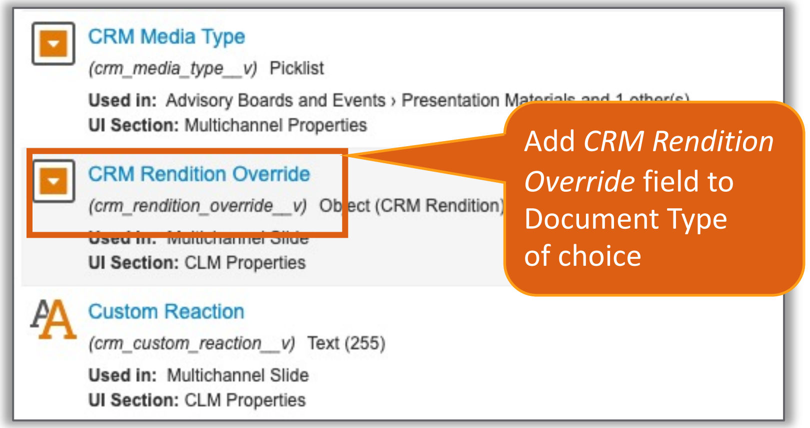
Document Level Rendition Type Selector for Single Doc Publishing for CLM Content

- 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)



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



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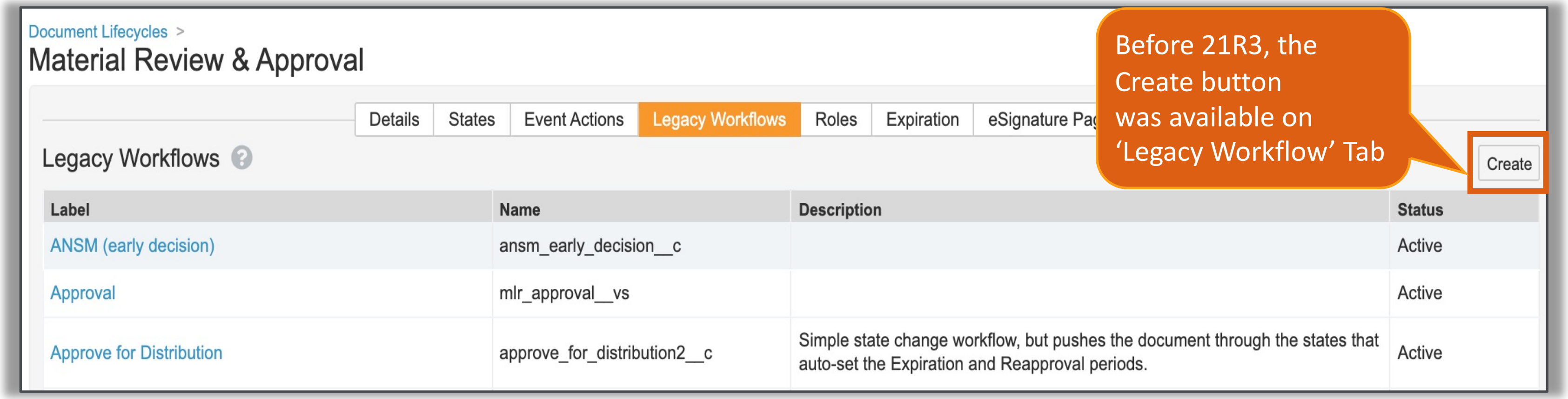
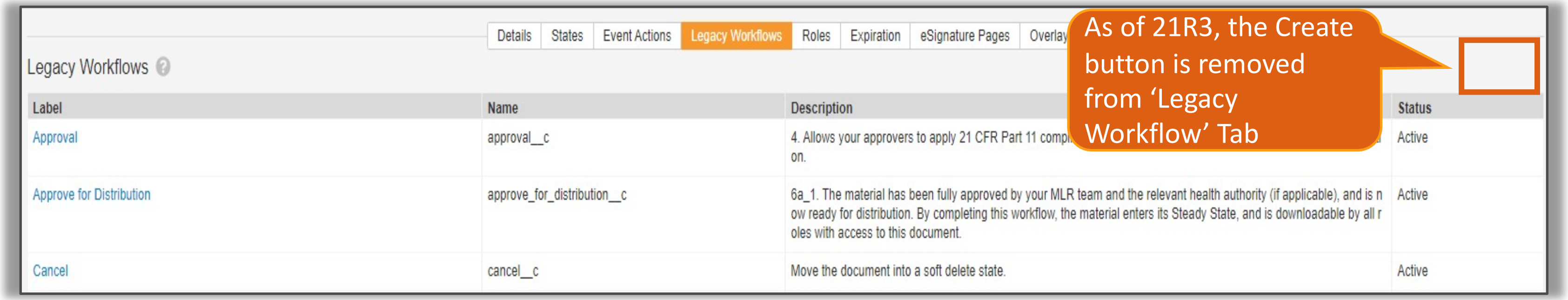
Lifecycles and OneWorkflow

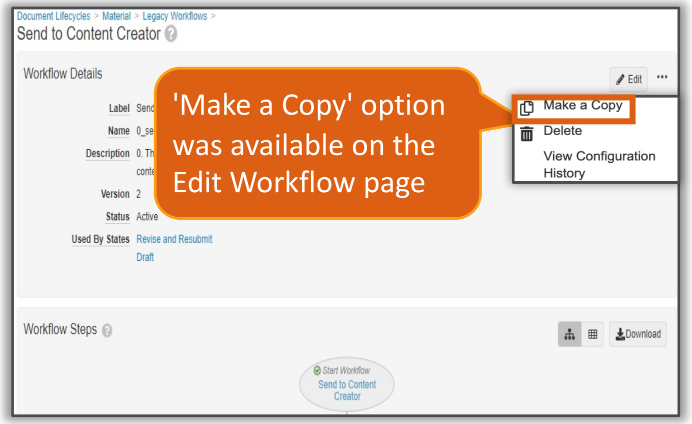
- OneWorkflow for Documents (fka *Multi-Document and Document Workflows*)
- OneWorkflow for Objects

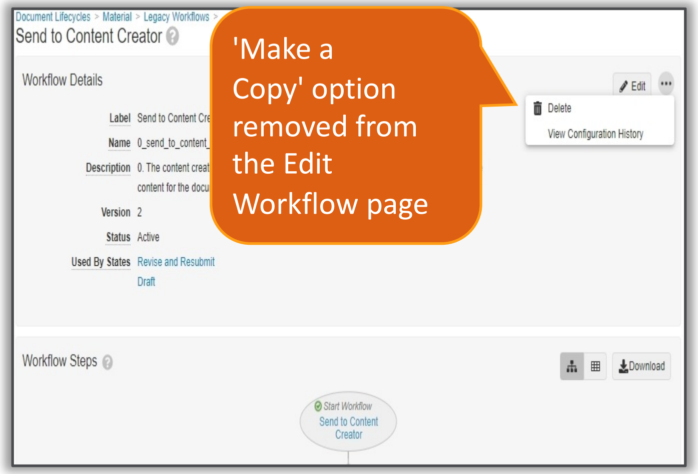
Remove Create for Legacy Workflow

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









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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

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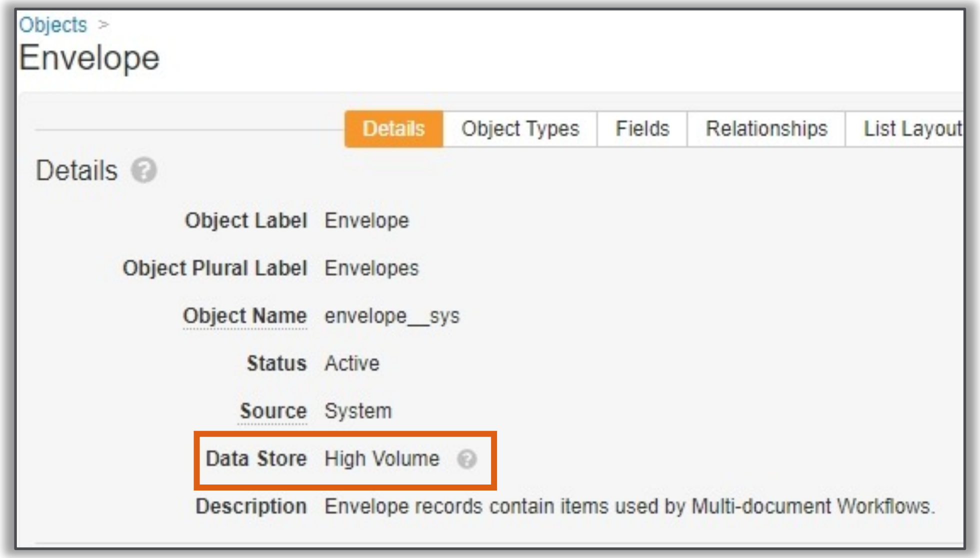
Envelope Objects to High Volume Object

- 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

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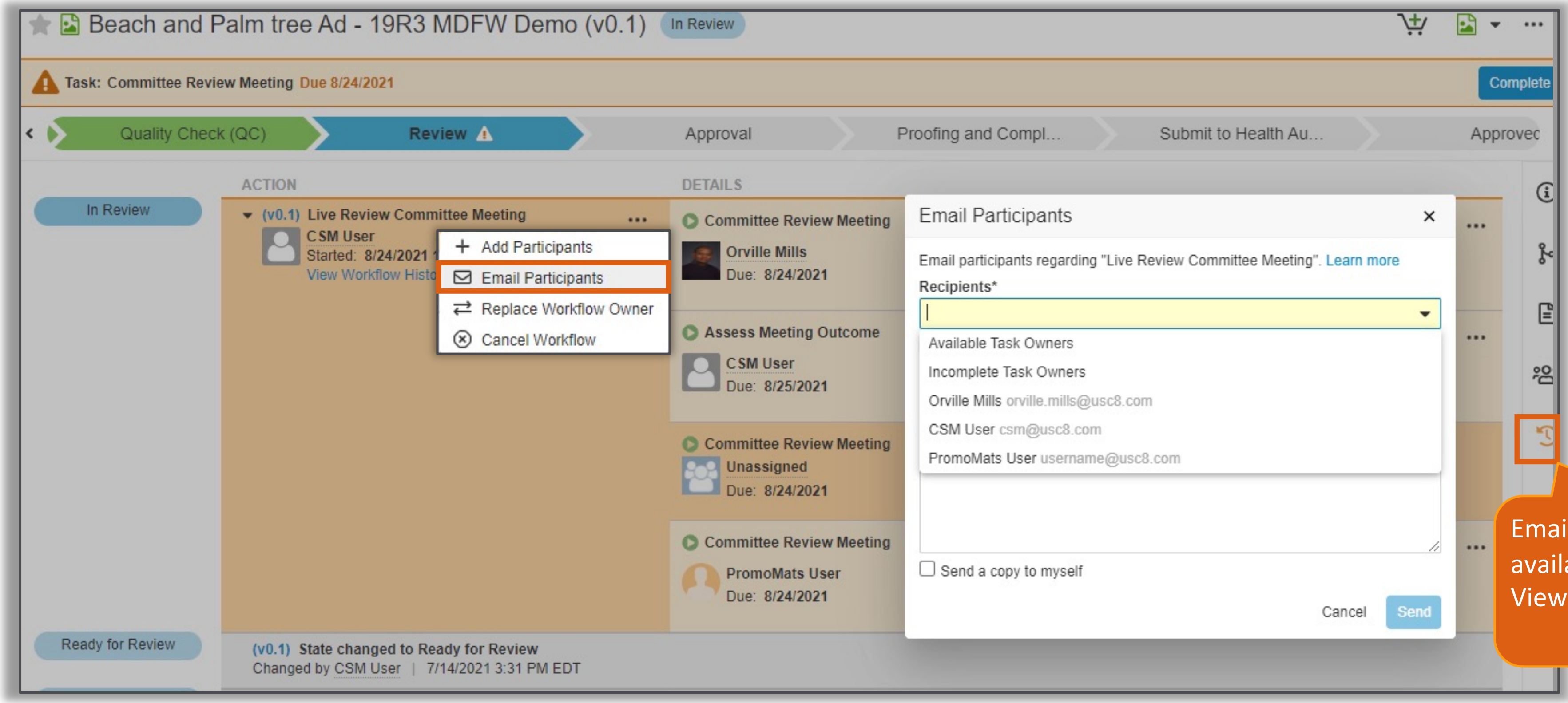
Email Participants Action

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



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

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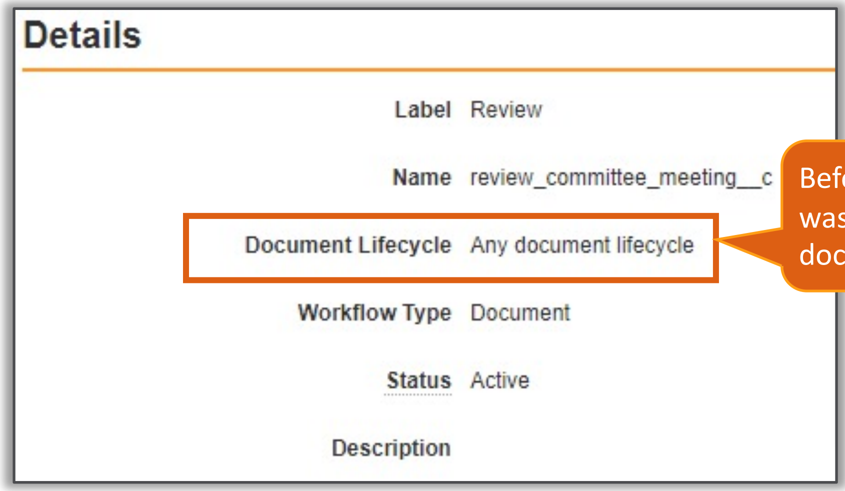
Single Verdict: Any Lifecycle Workflow

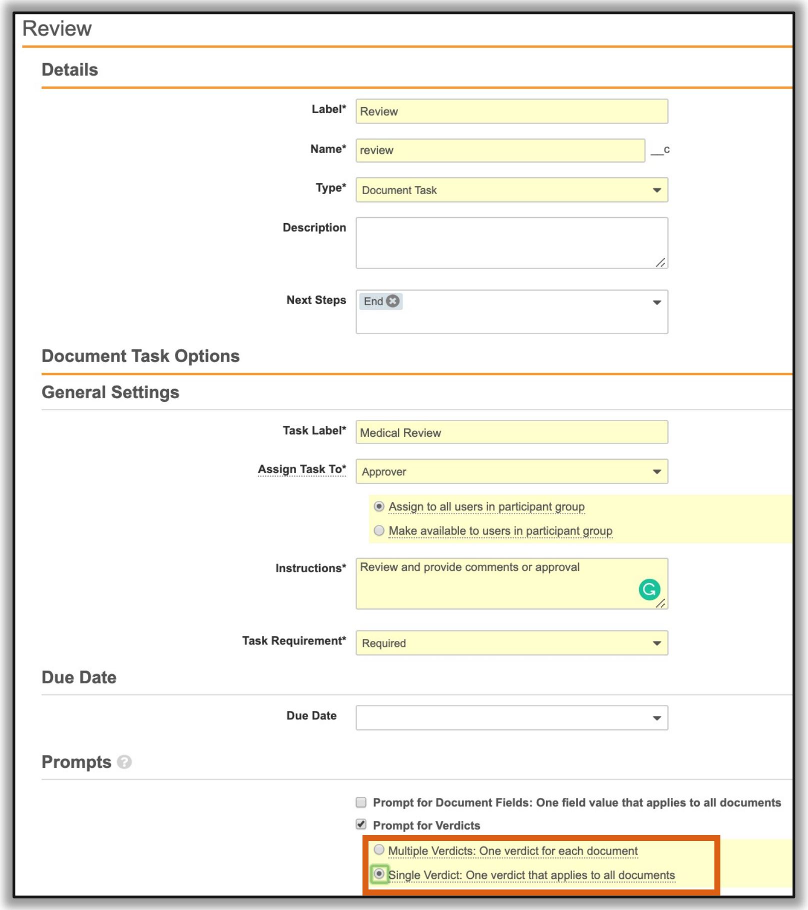
- A single verdict can now be applied to a document workflow configured for ‘Any Document Lifecycle’
  - This allows users to apply a single verdict to all documents included in the workflow



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



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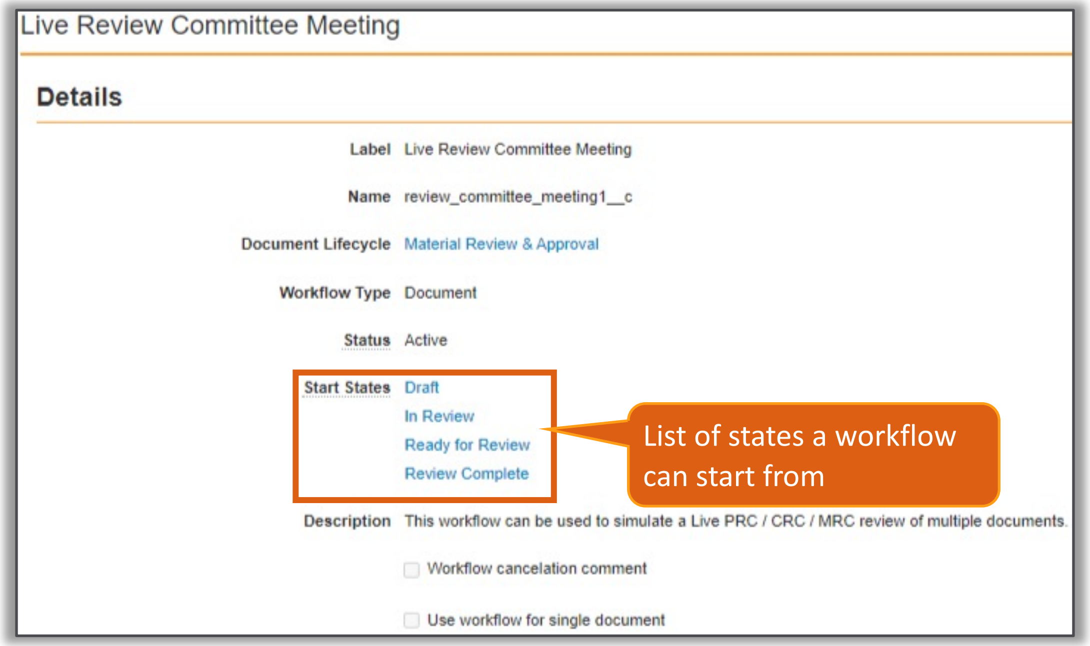
View Workflow Start States

- 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

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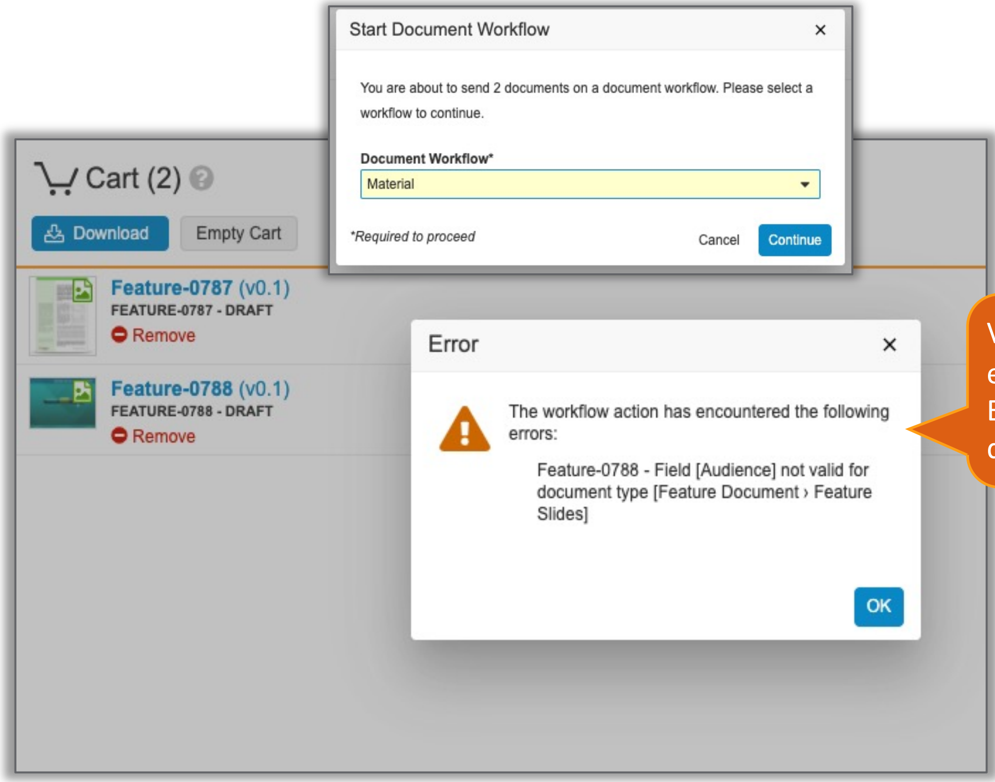
Ignore Non-Applicable Field in Content Action or Event Action

- 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*



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

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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

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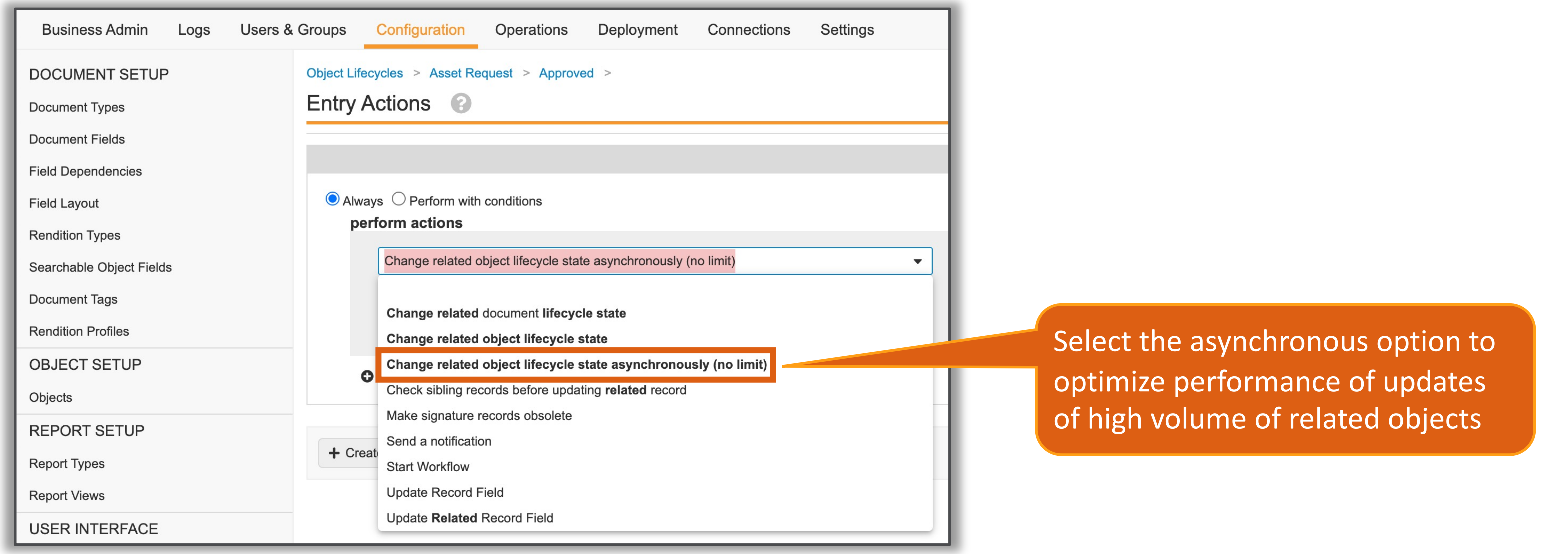
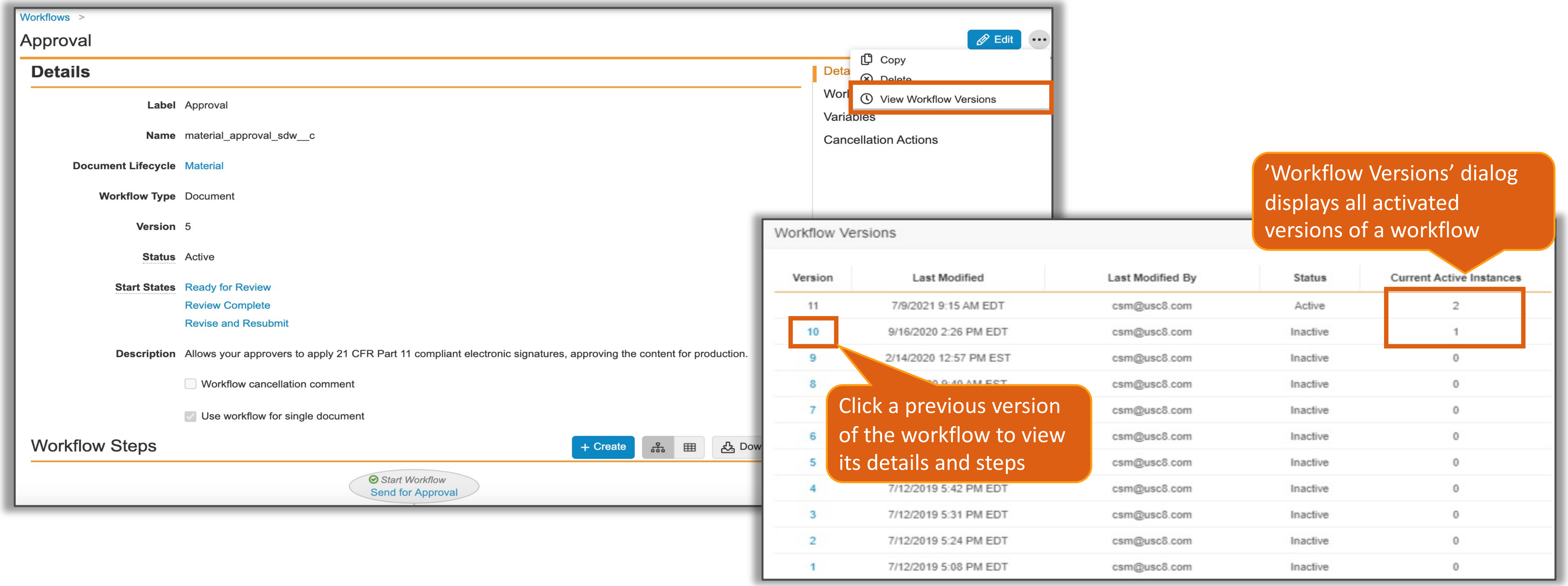
Asynchronous Related Object Change State Entry Action

- 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



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



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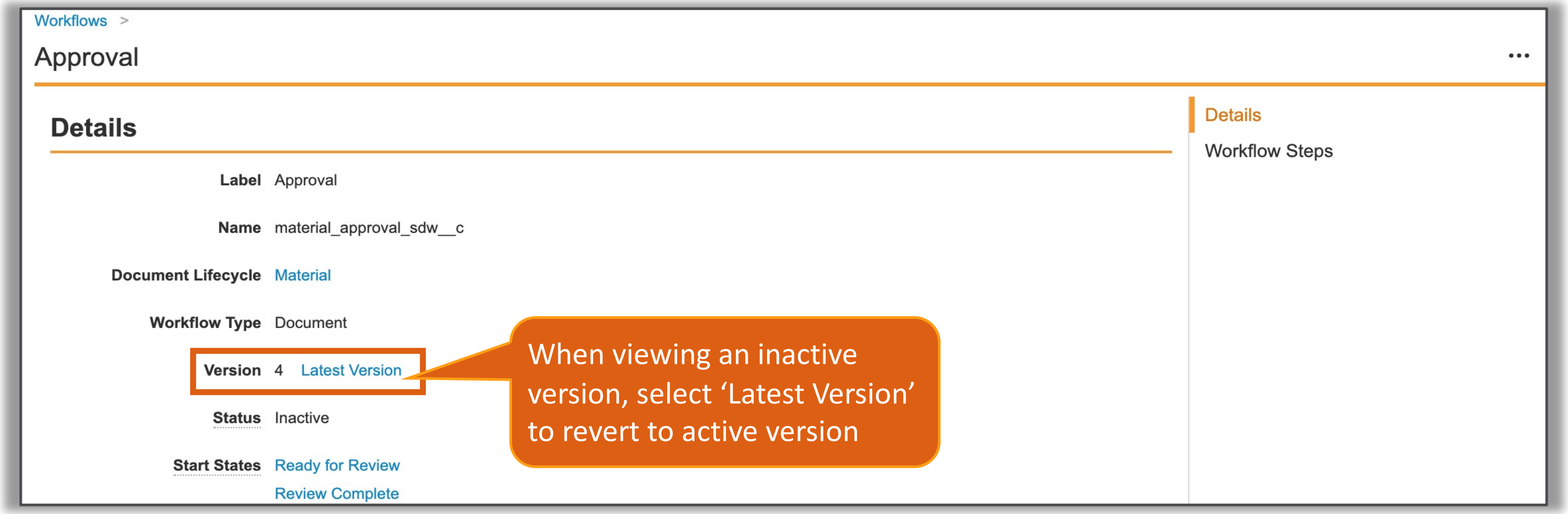
Workflow Version History

- 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



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

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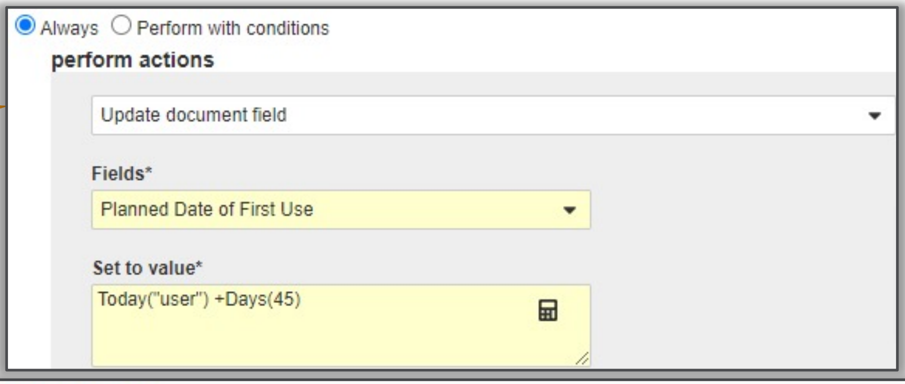
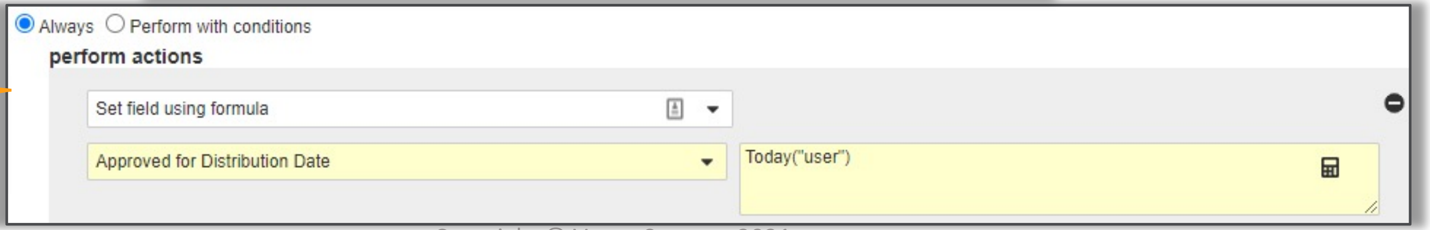
Support for Today("user") Function

- 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



Set field using formula for Lifecycle Entry Actions



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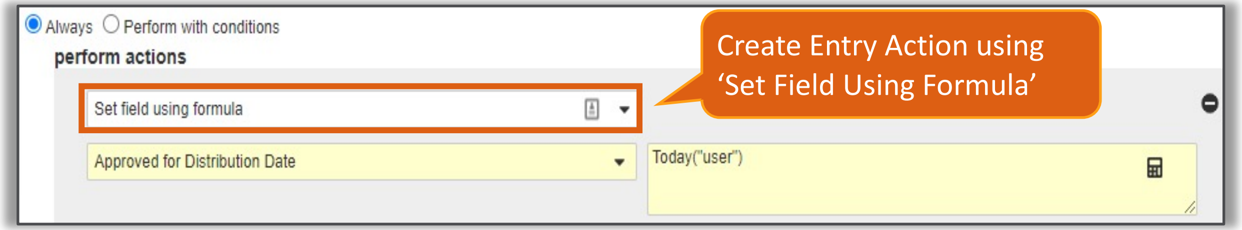
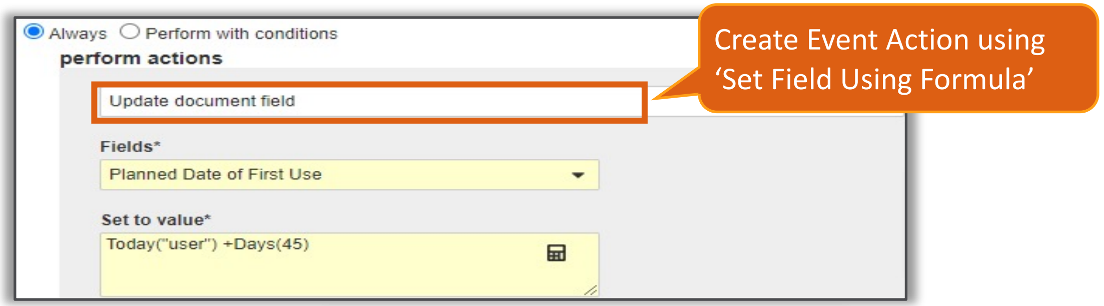
Support for Today("user") Function

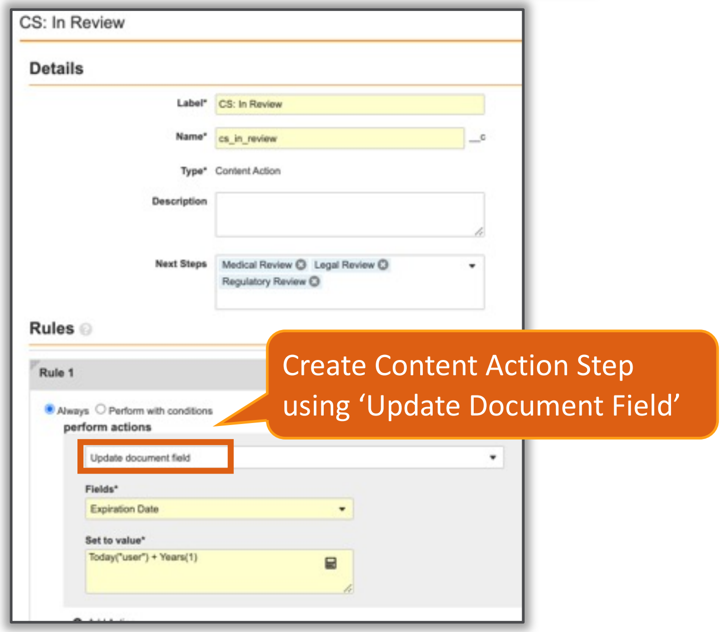
- Configuration – Entry Actions
  - Admin > Configuration > Document Lifecycle > [Lifecycle] > [State] > Entry Action > Edit

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

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







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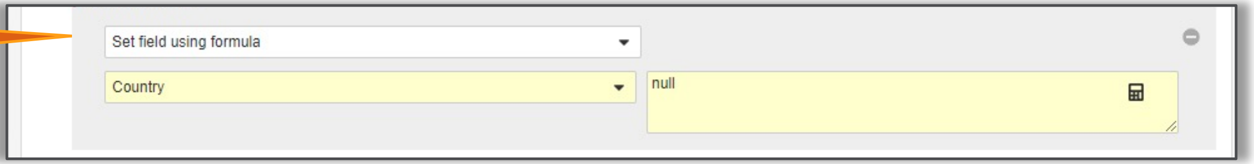
Set Reference Field to Blank

- 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

Set field using formula for Lifecycle Entry Actions



- 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

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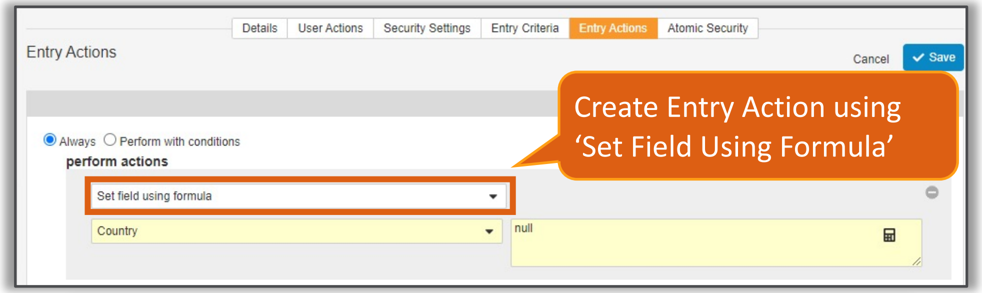
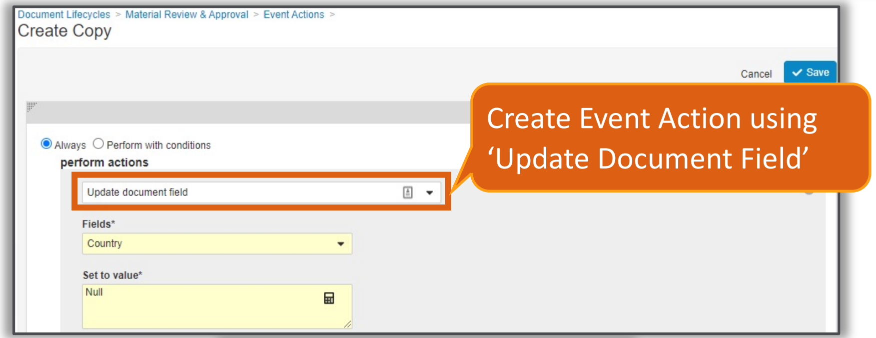
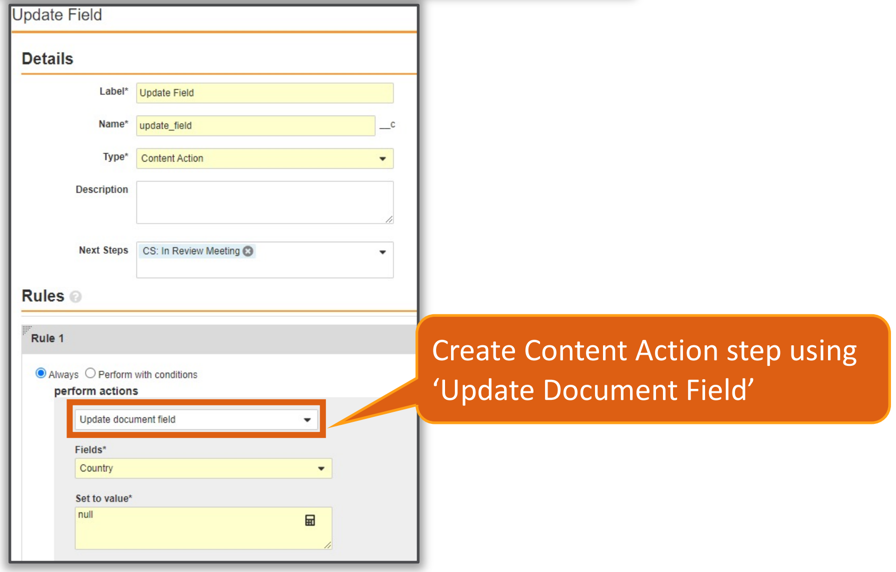
Set Reference Field to Blank

- Configuration – Entry Actions
  - Admin > Configuration > Document Lifecycle > [Lifecycle] > [State] > Entry Action > Edit
- Configuration – Event Actions
  - Admin > Configuration > Document Lifecycle > [Lifecycle] > Event Actions > [Create Document/Draft/Copy] > Edit
- Configuration - Workflow Update Fields
  - Admin > Configuration > Workflows > [Workflow] > [Create Step]

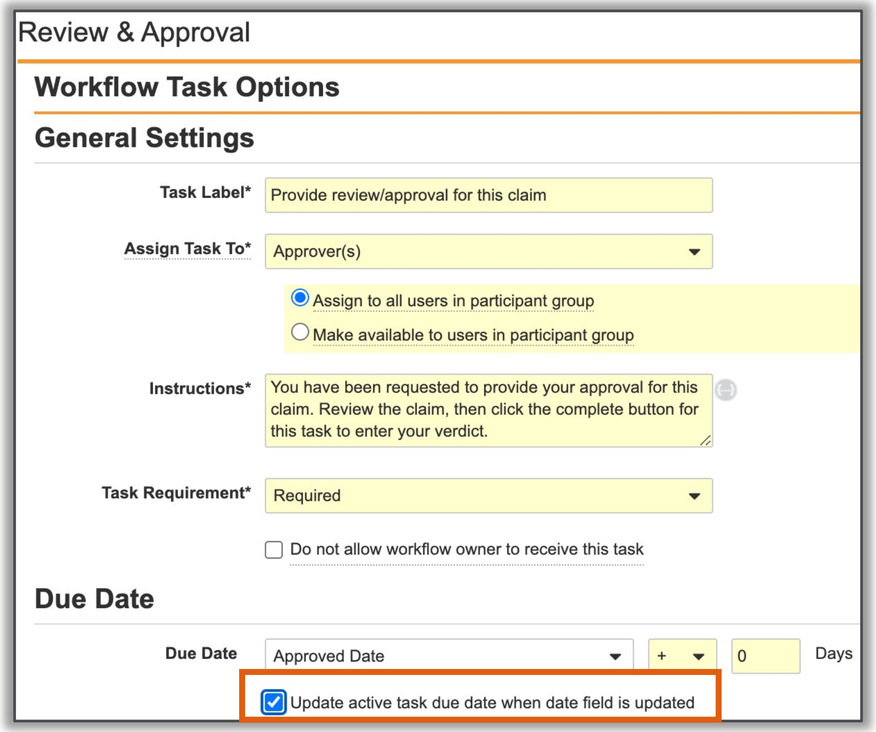






Update Task Due Date on Object Date Field Update

- 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



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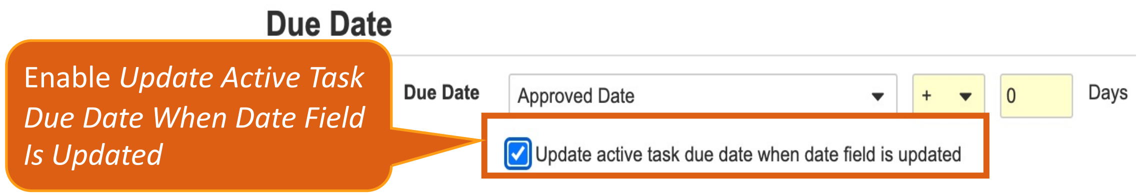
Update Task Due Date on Object Date Field Update

- 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



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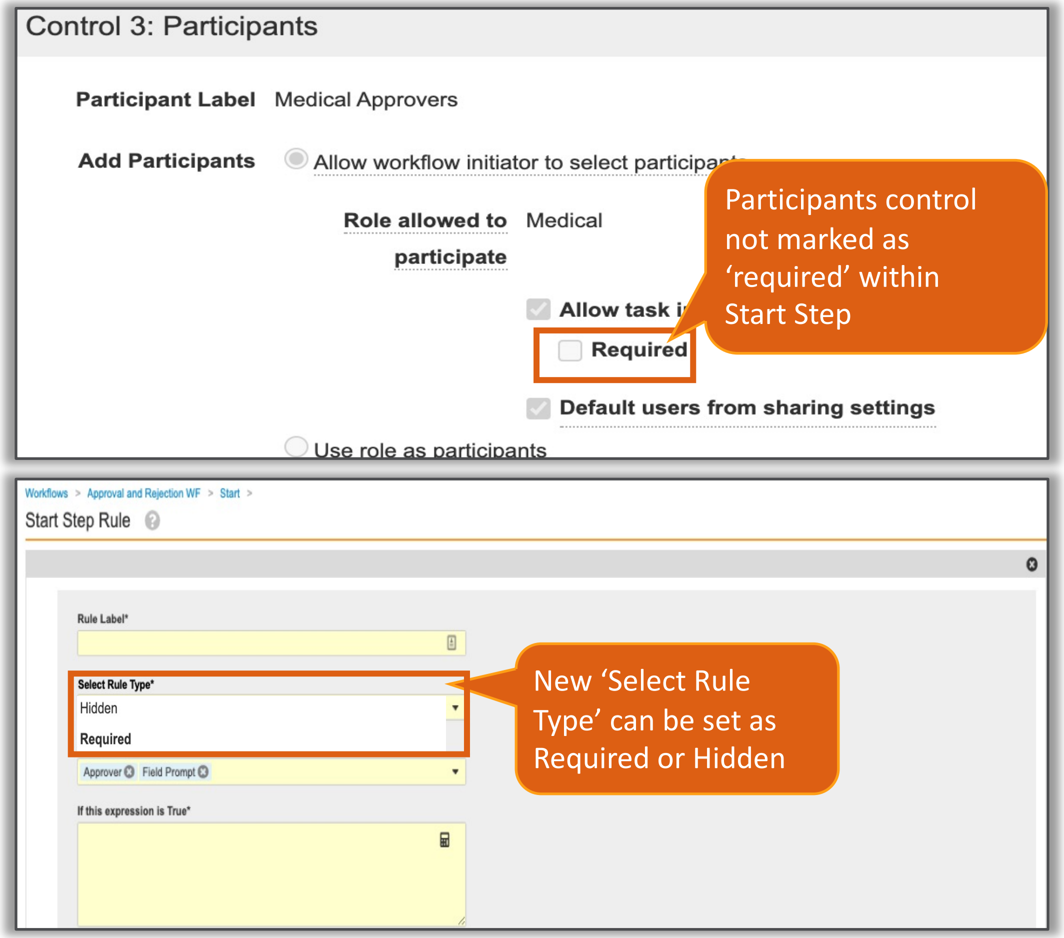
Start Step Rule: Required Controls

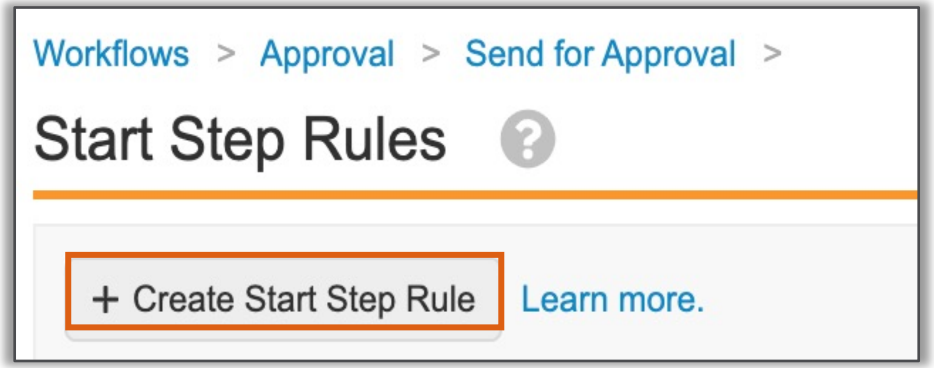
- Admins can now configure Document and Object workflow Start Step Rules to require an otherwise optional control
  - On the Start Step Rule, a new dropdown menu labeled *Select Rule Type* is available, where Admins can select values of ‘Required’ or ‘Hidden’ for a Participants, Fields, or Variables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



Start Step Rule: Required Controls

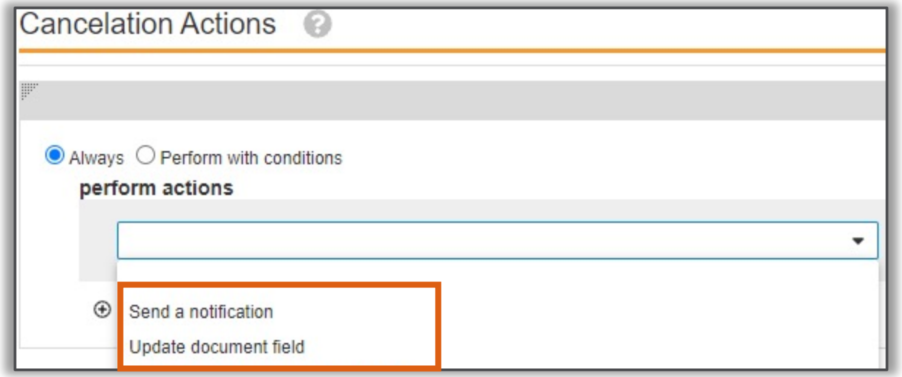
- Considerations
  - All existing Start Step Rules will have value of 'hidden'
  - Learn more about Object Workflows Start Step Rules
  - Learn more about Document Workflows Start Step Rules

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

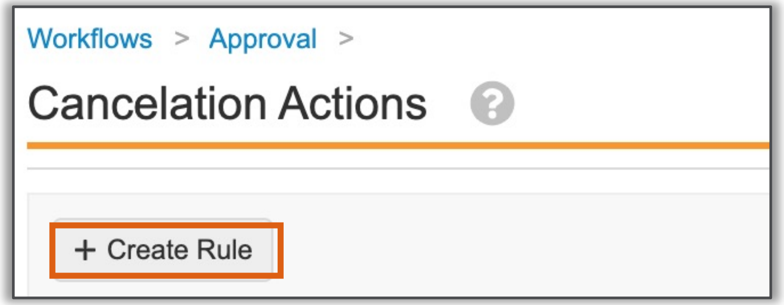


Workflow Cancelation Actions

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



- Considerations
  - Available on OneWorkflow for Documents and OneWorkflow for Objects
  - Maximum of 25 cancelation actions can be configured per workflow
  - SDK can be utilized to add custom system actions
  - Learn more about Document Cancelation Actions and Object Cancelation Actions
- Configuration
  - Admin > Configuration > Workflows > [Workflow] > [Edit Cancelation Actions] > *Create Rule*



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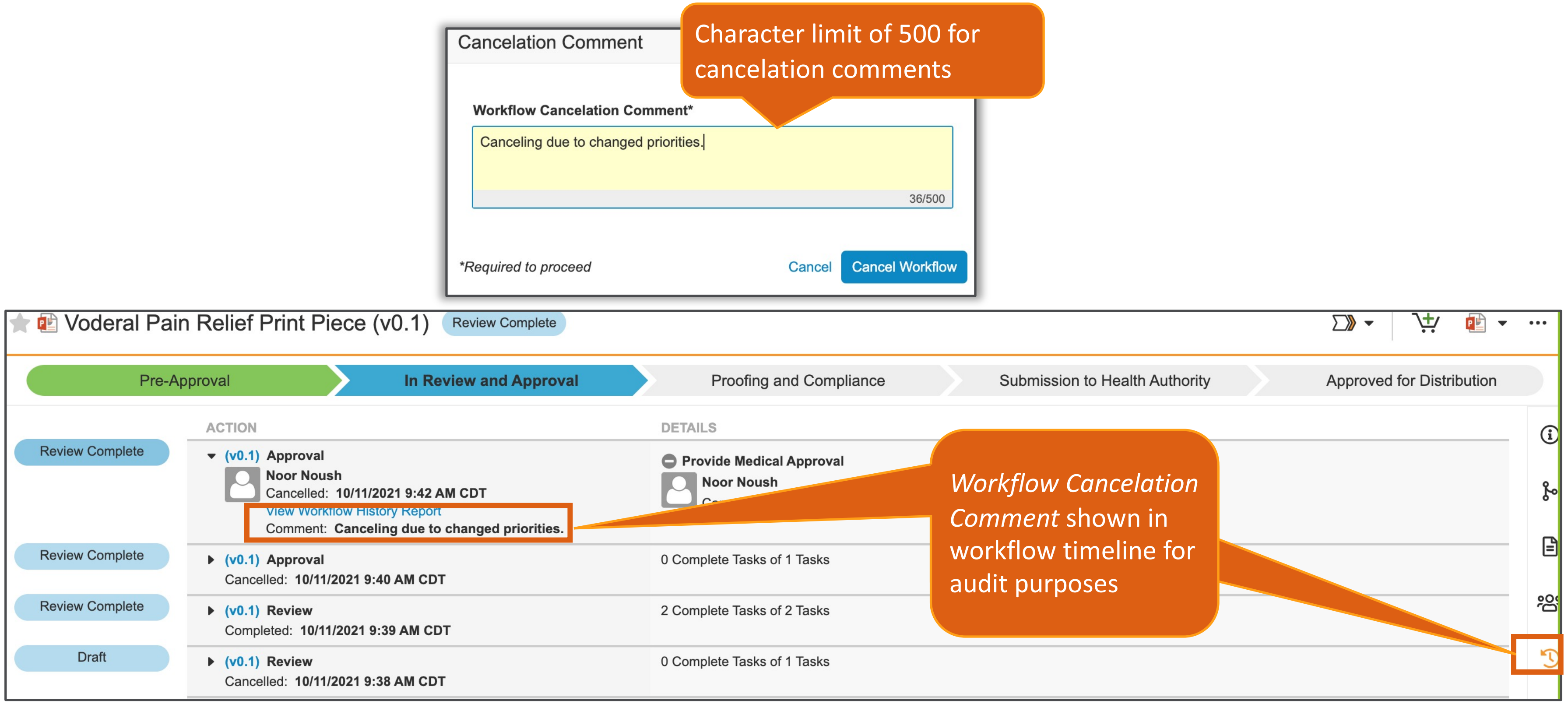
Workflow Cancelation Comment

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



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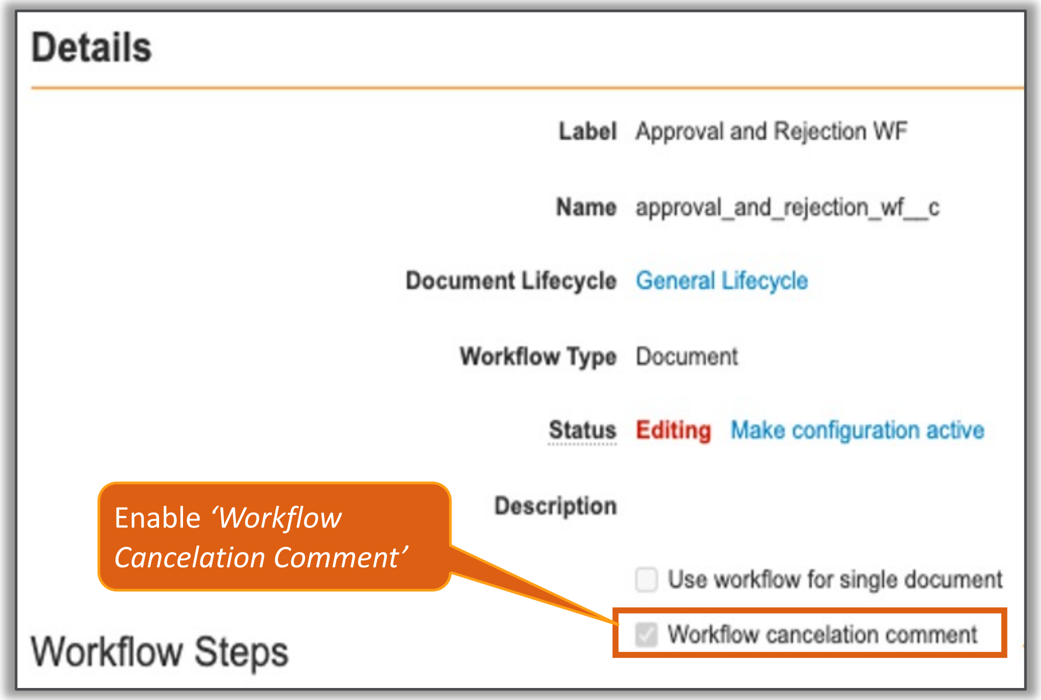
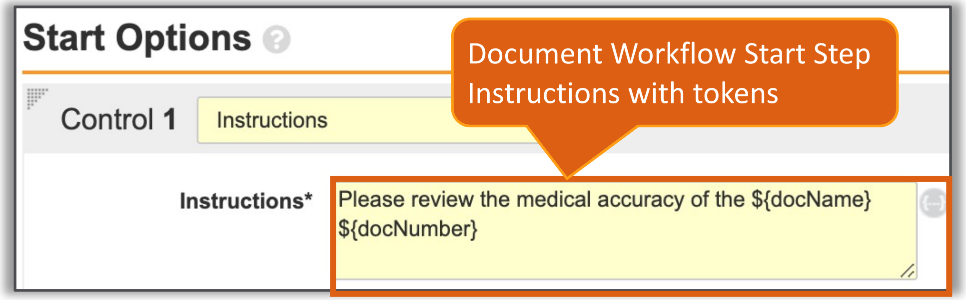
Workflow Cancelation Comment

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

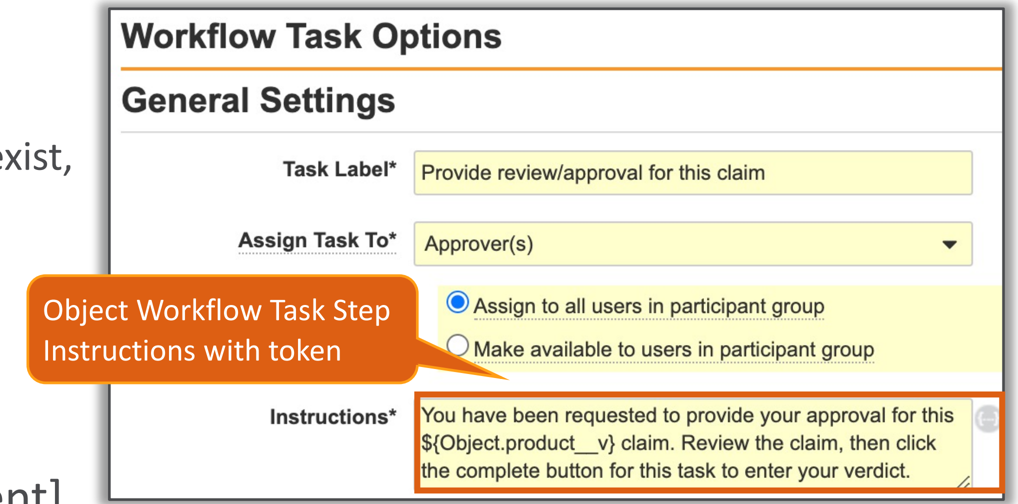


Set Tokens in Instructions

- 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

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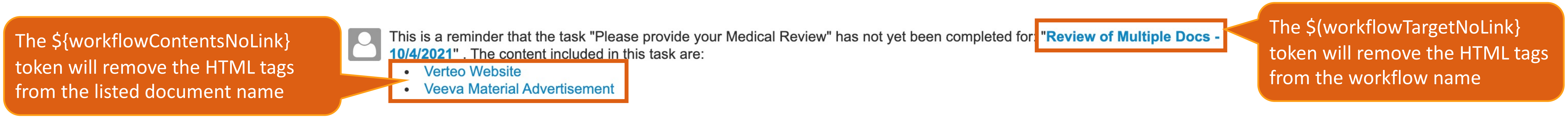
Set Tokens in Instructions

- 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



- 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

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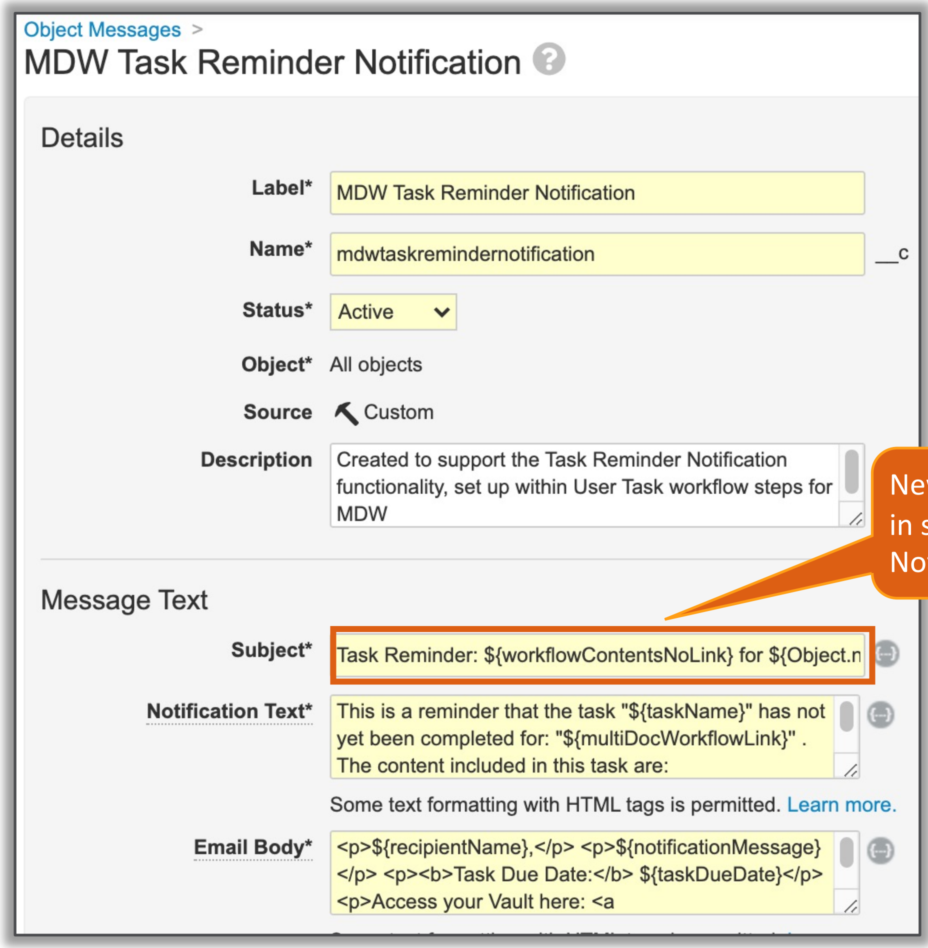
Set Tokens in Instructions

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



New NoLink token added in subject of Object Notification Message

Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: 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/

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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

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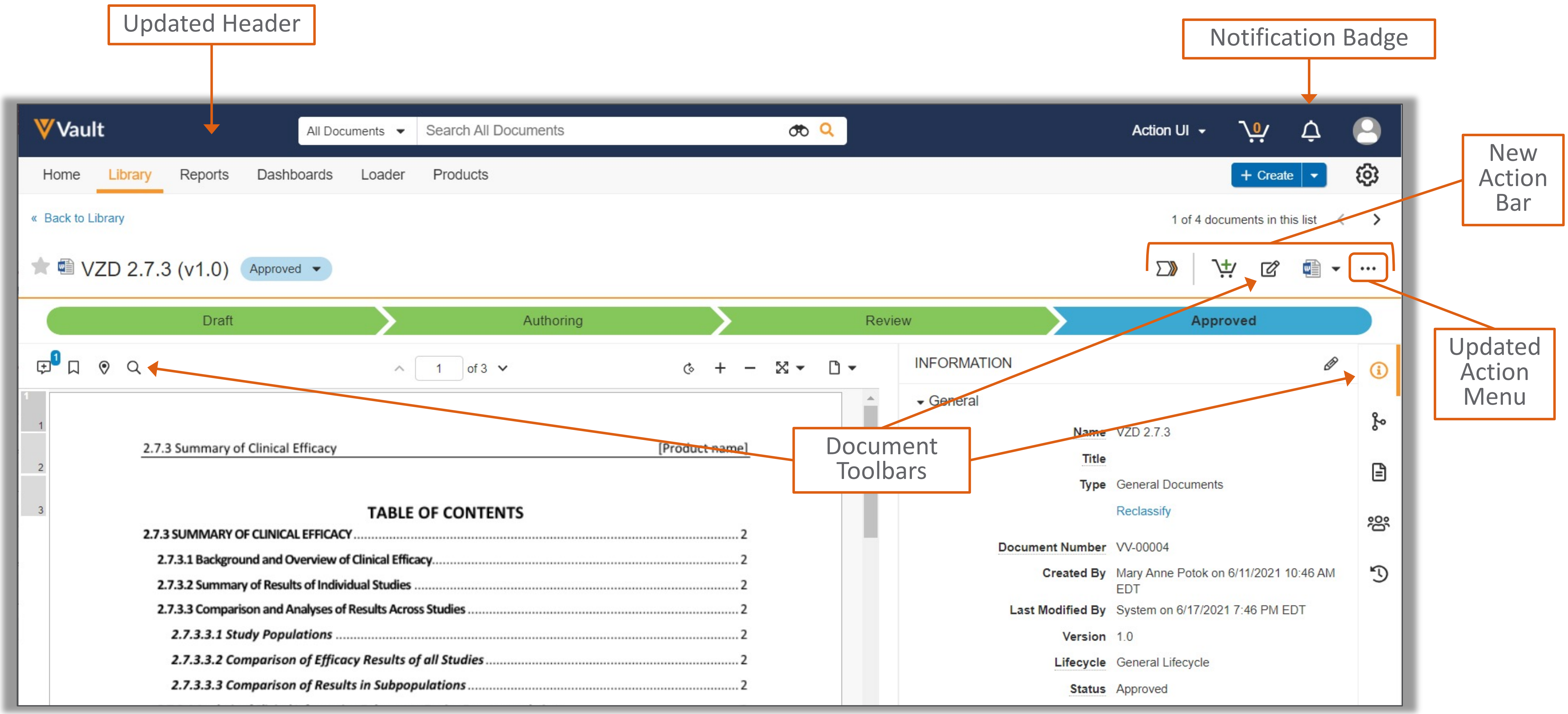
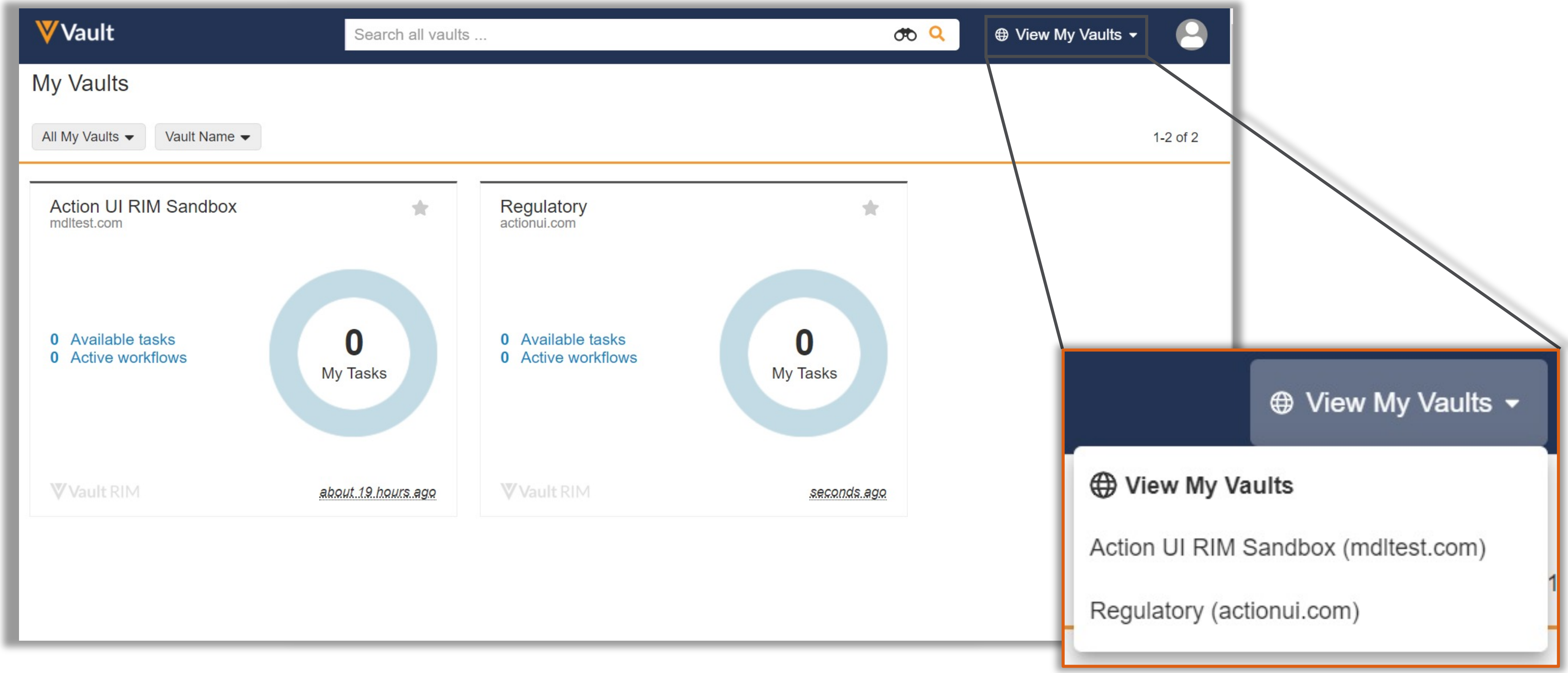
Action UI Highlights



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



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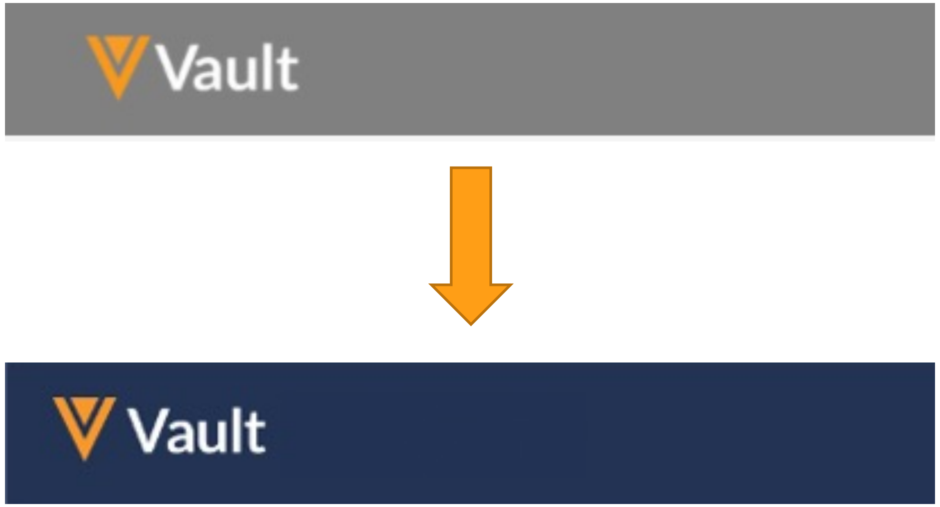
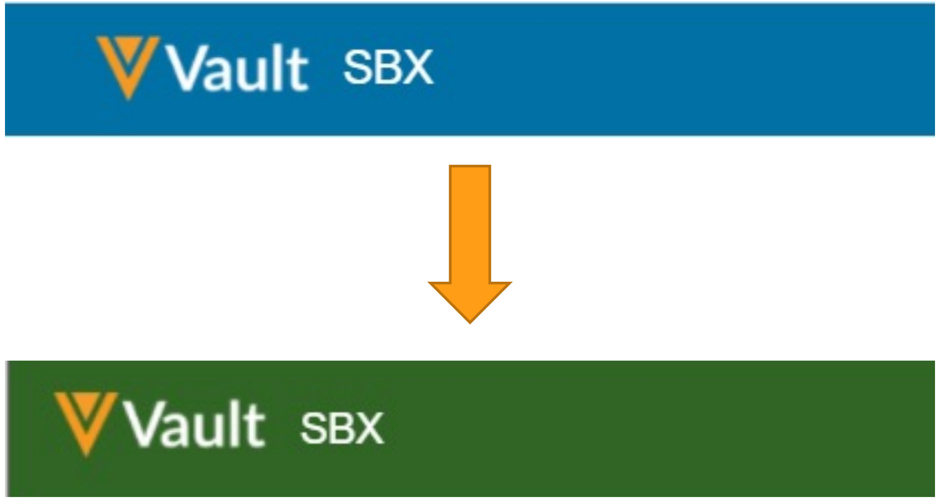
Updated Header and Banners

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

Production Vault Header



Sandbox Vault Header



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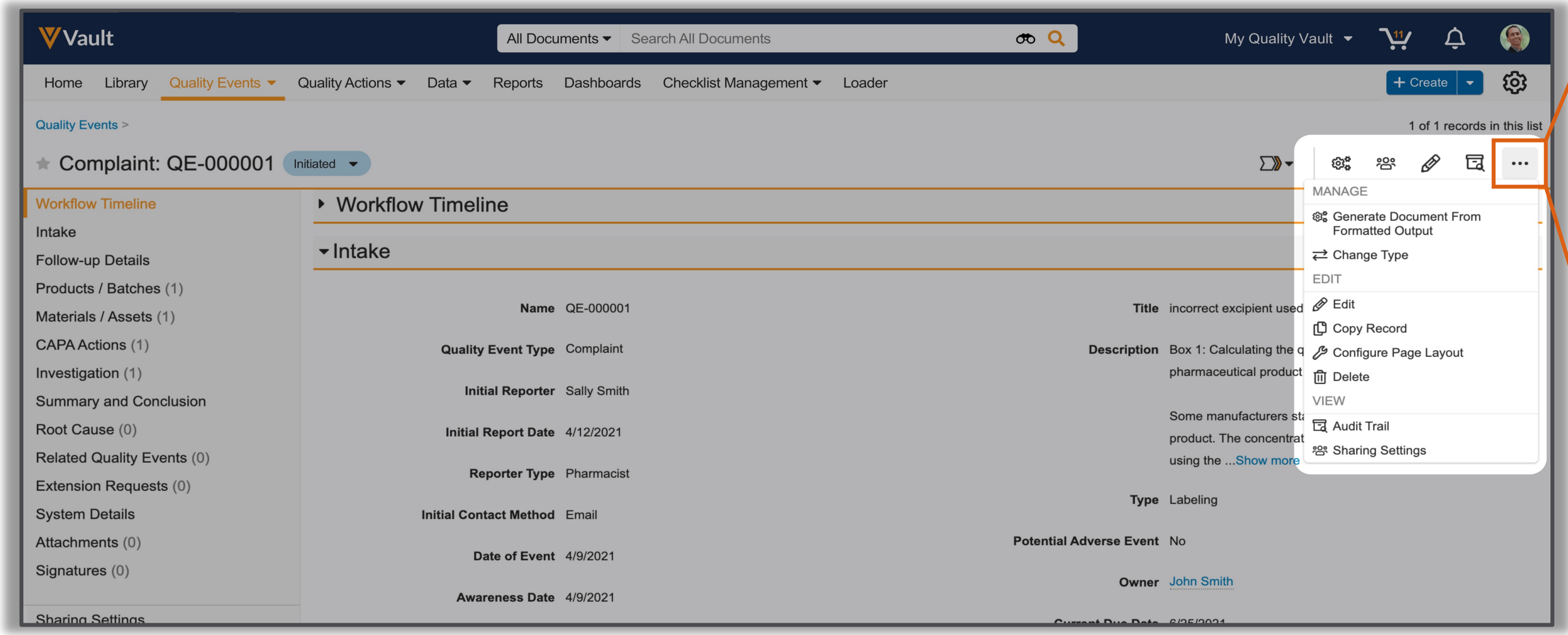
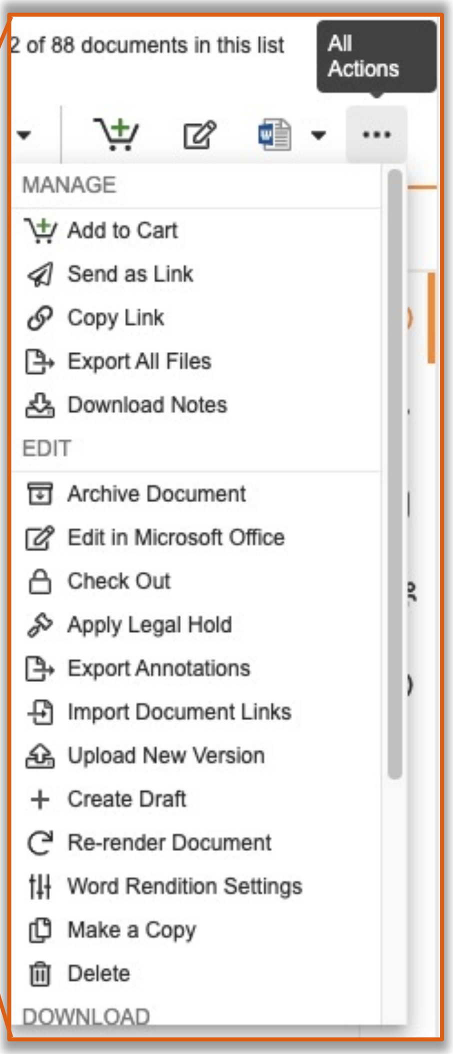
Actions Menu - Ellipsis

- 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





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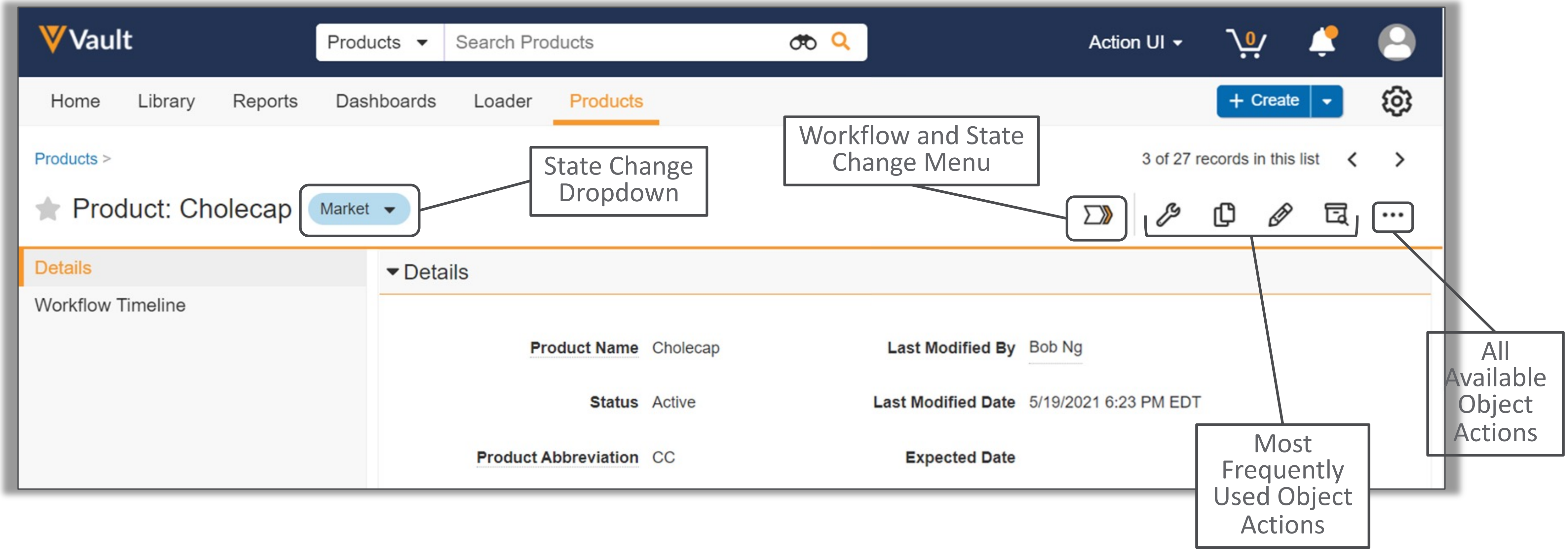
Object Record Overview

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



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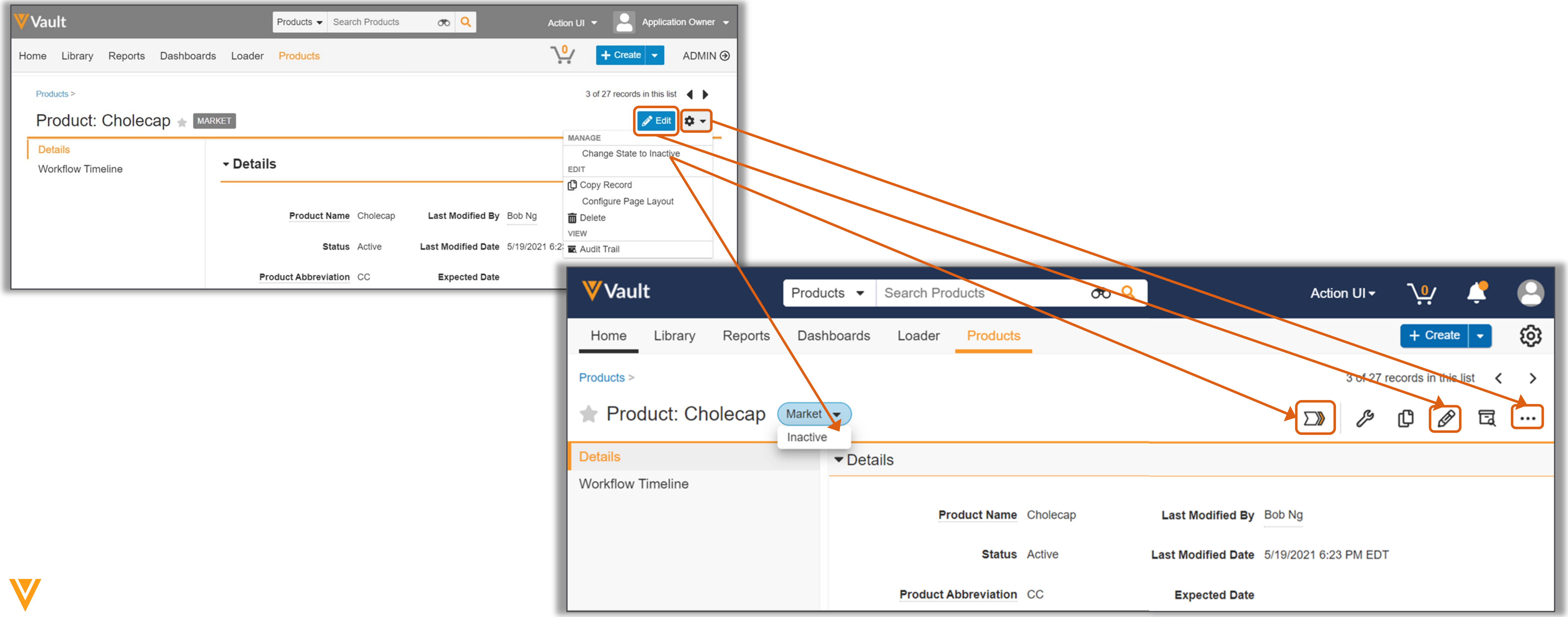
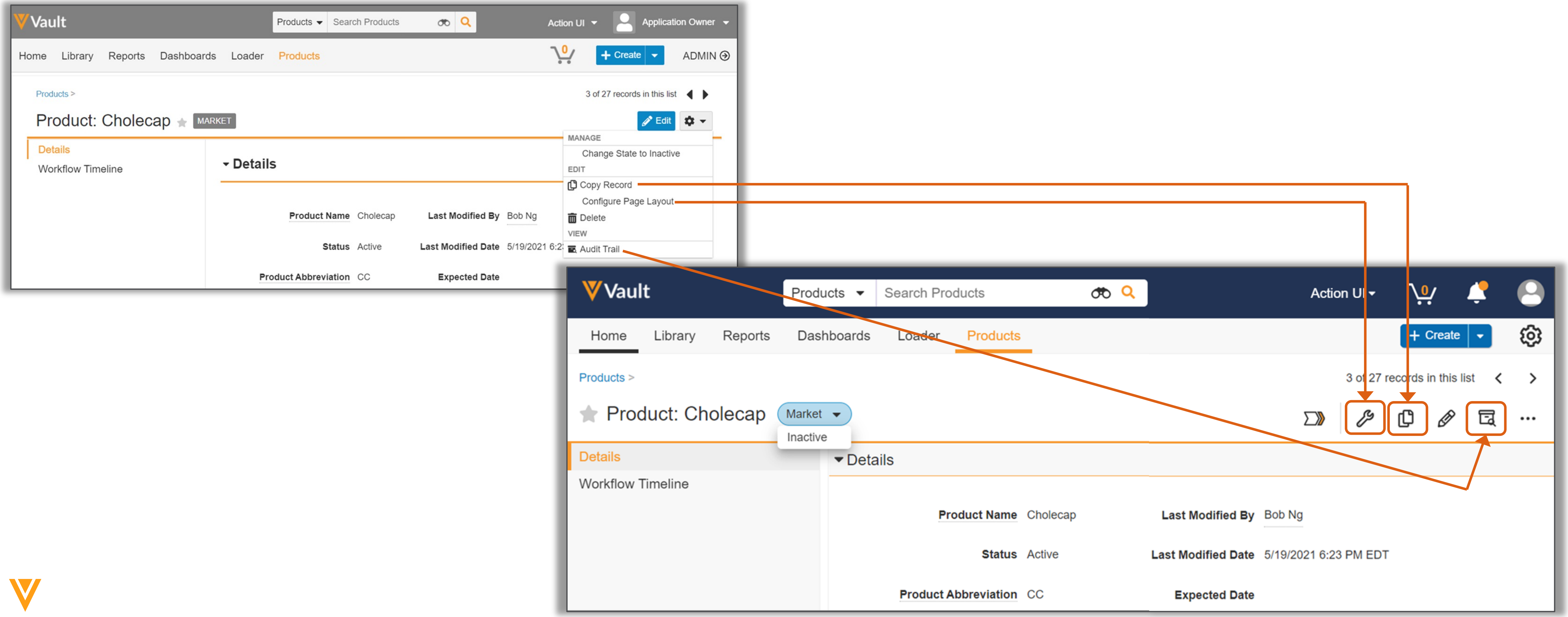
Record Action Bar

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



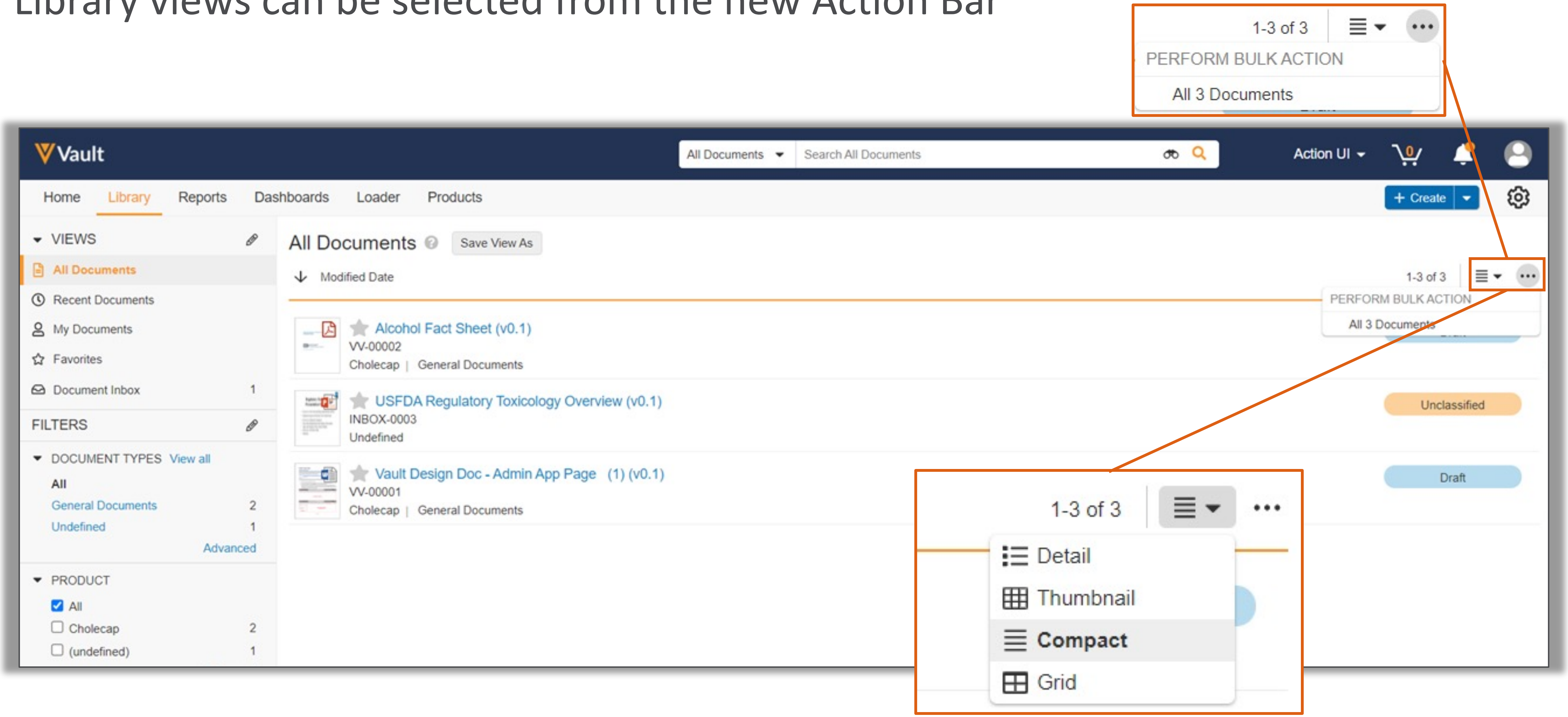
Record Action Bar

- 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



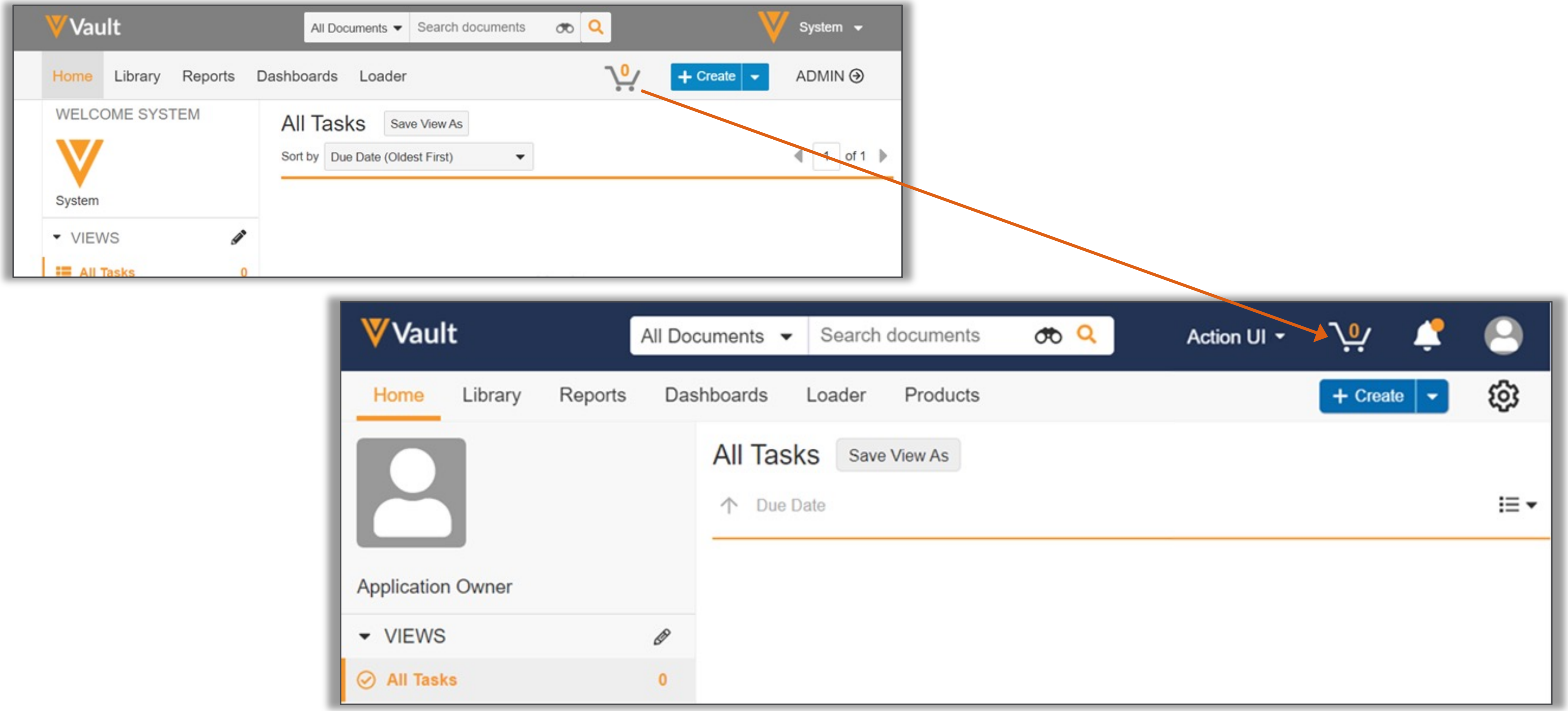
Library Overview

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



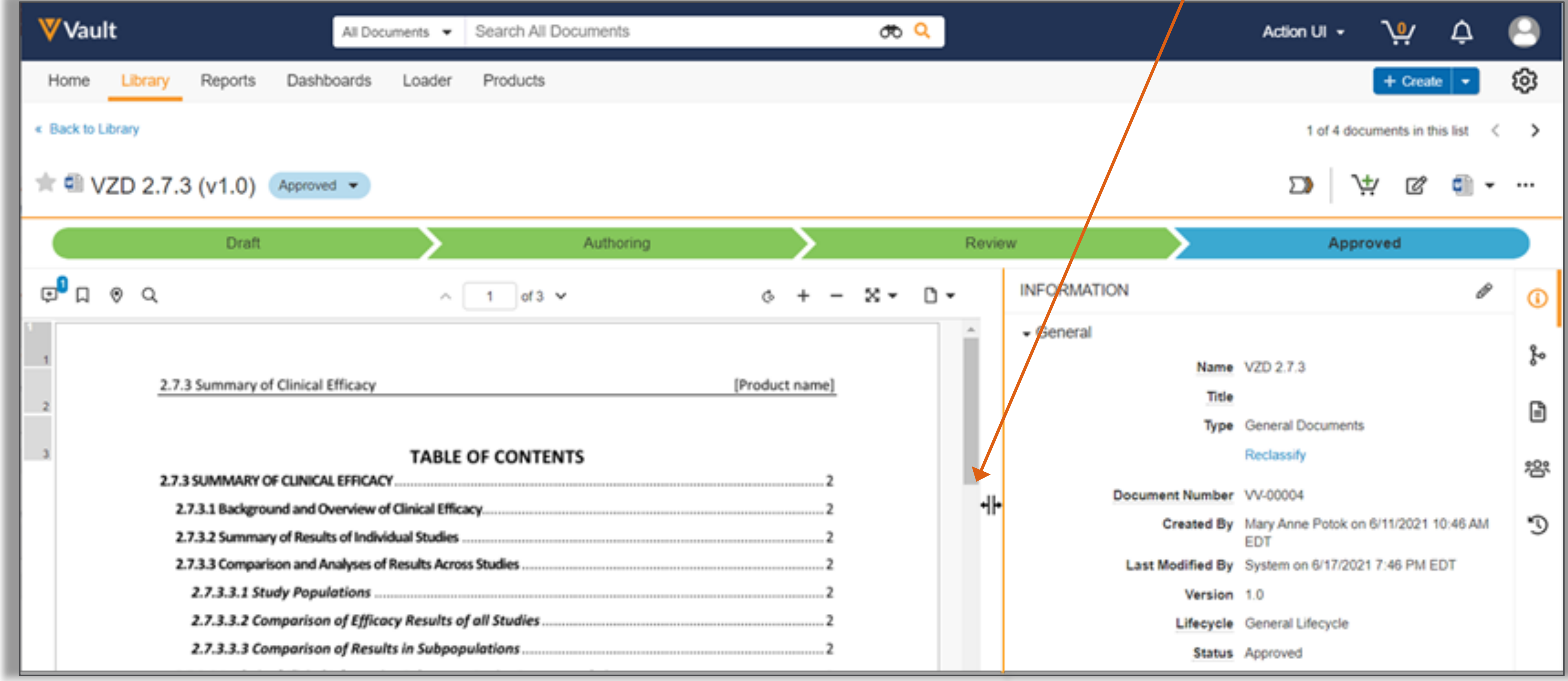
Library Overview

- 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



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

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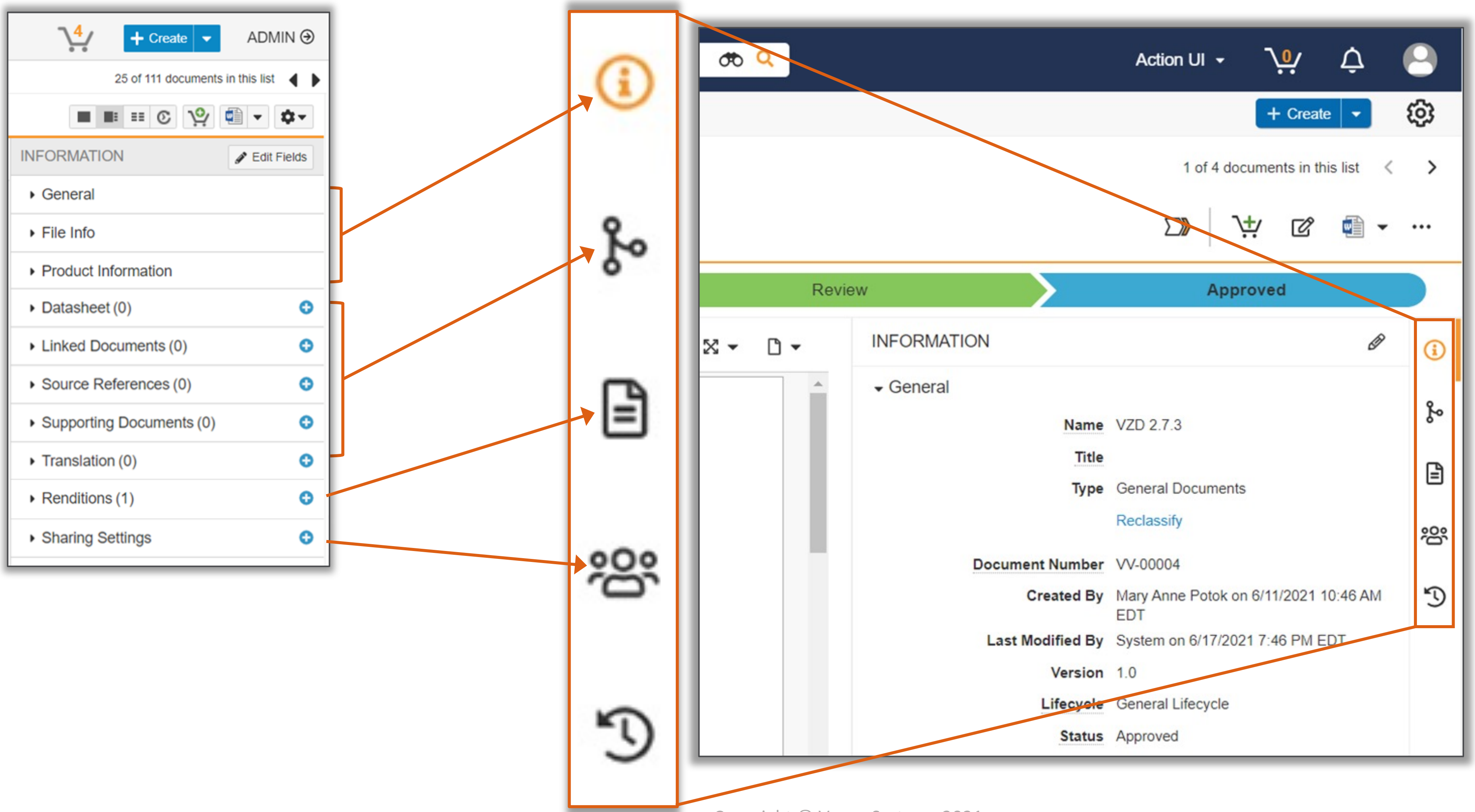
Document Information

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



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

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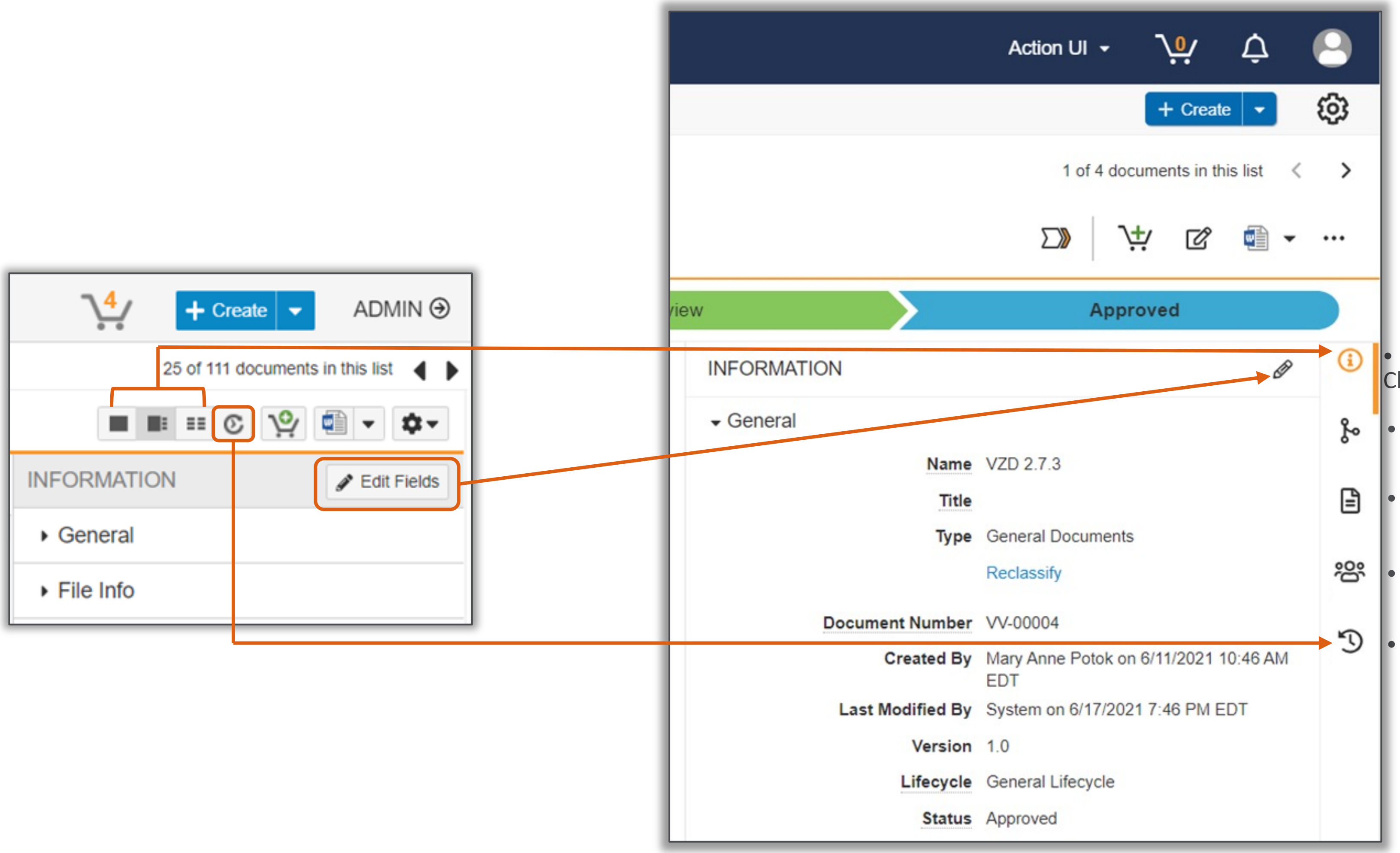
Document Information

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



- Information
Click to expand/collapse or remove pane from view
- Relationships
- Files
- Sharing Settings
- Timeline View

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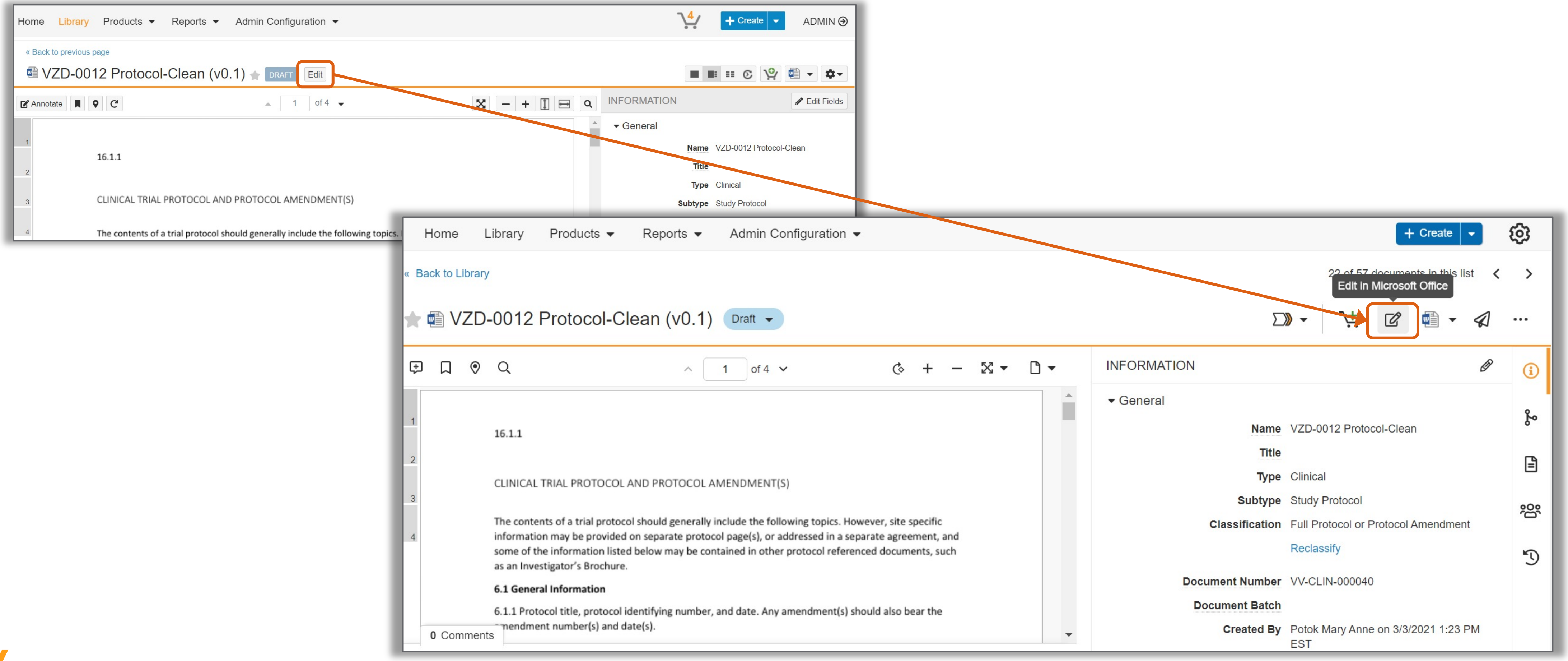
Collaborative Authoring

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



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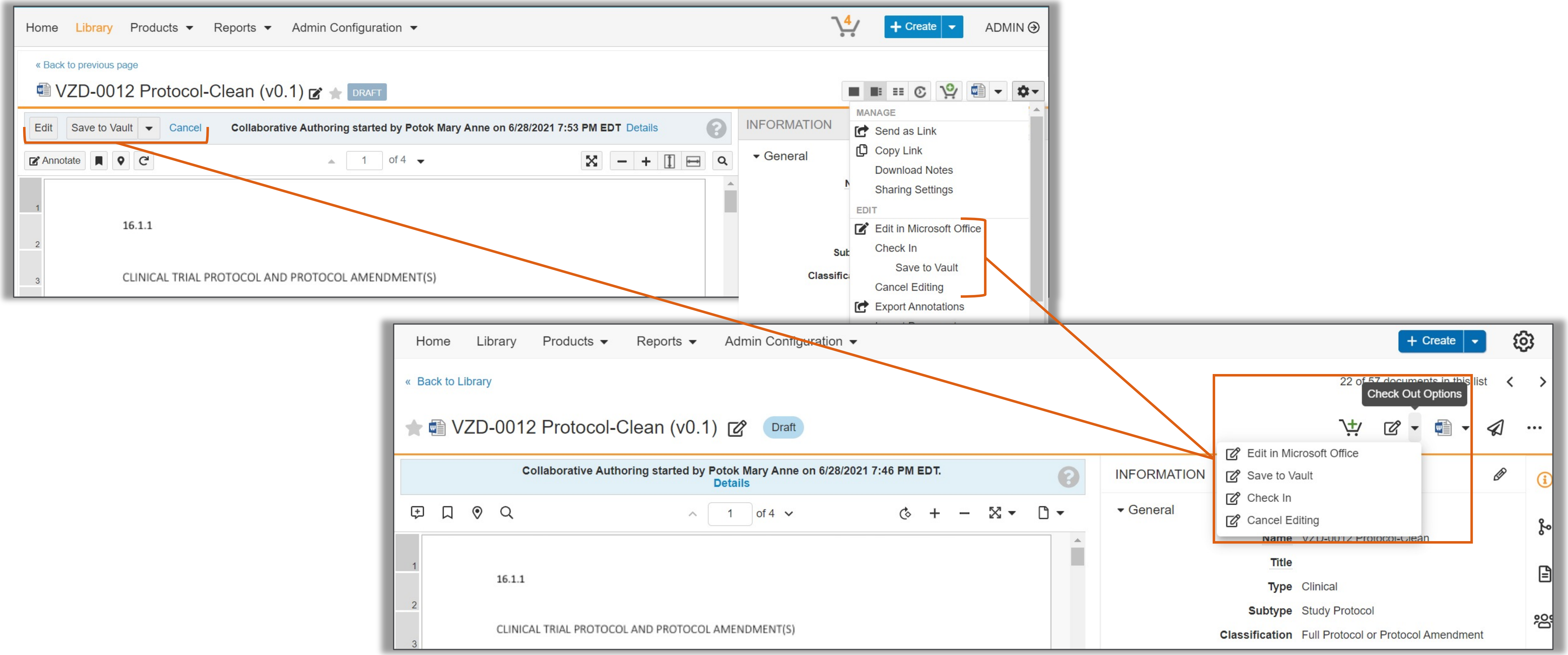
Collaborative Authoring

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



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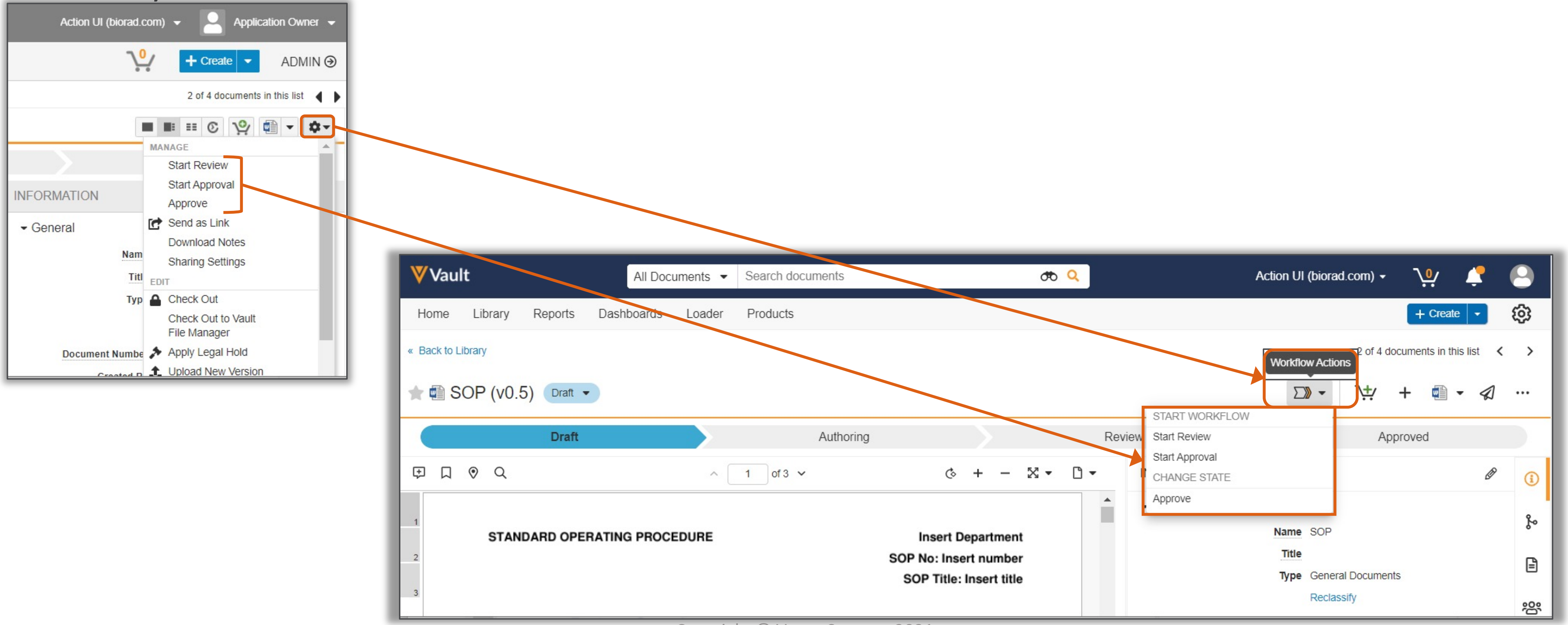
Document Lifecycles and Workflows

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



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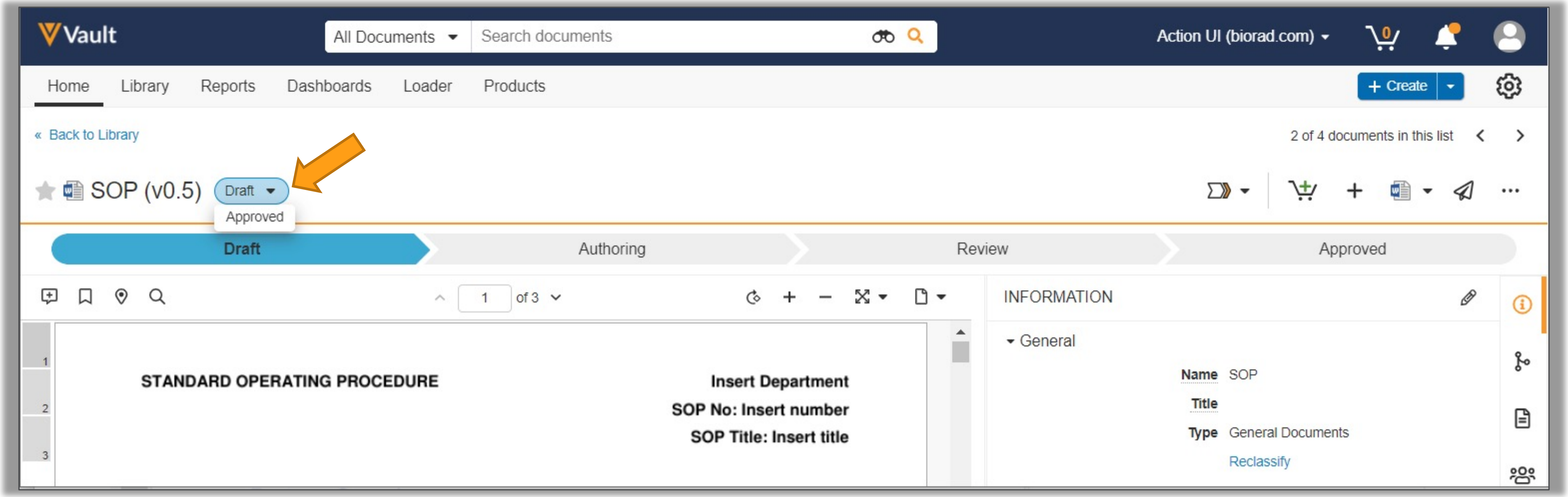
Document Lifecycles and Workflows

- 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



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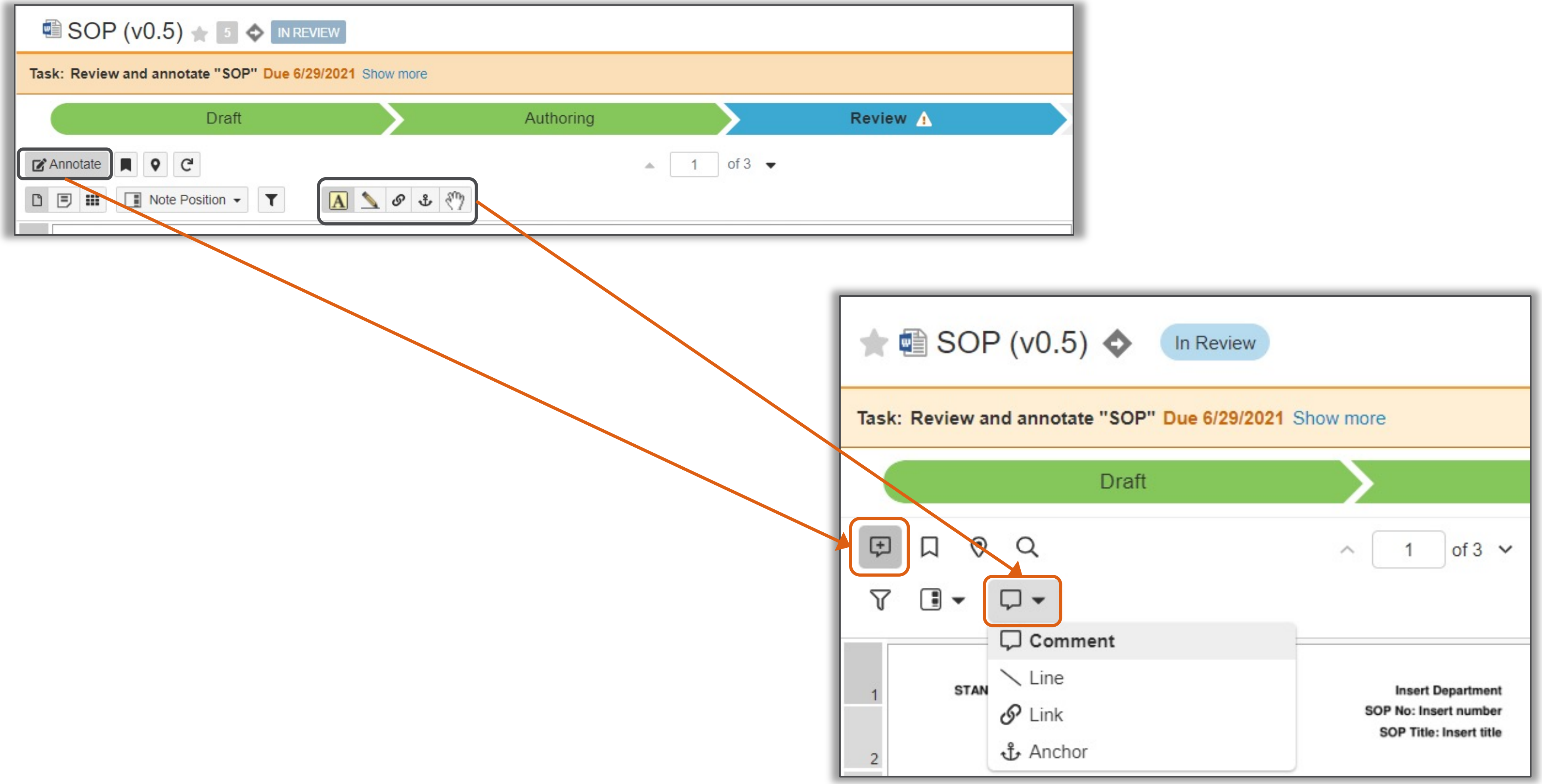
Annotations

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



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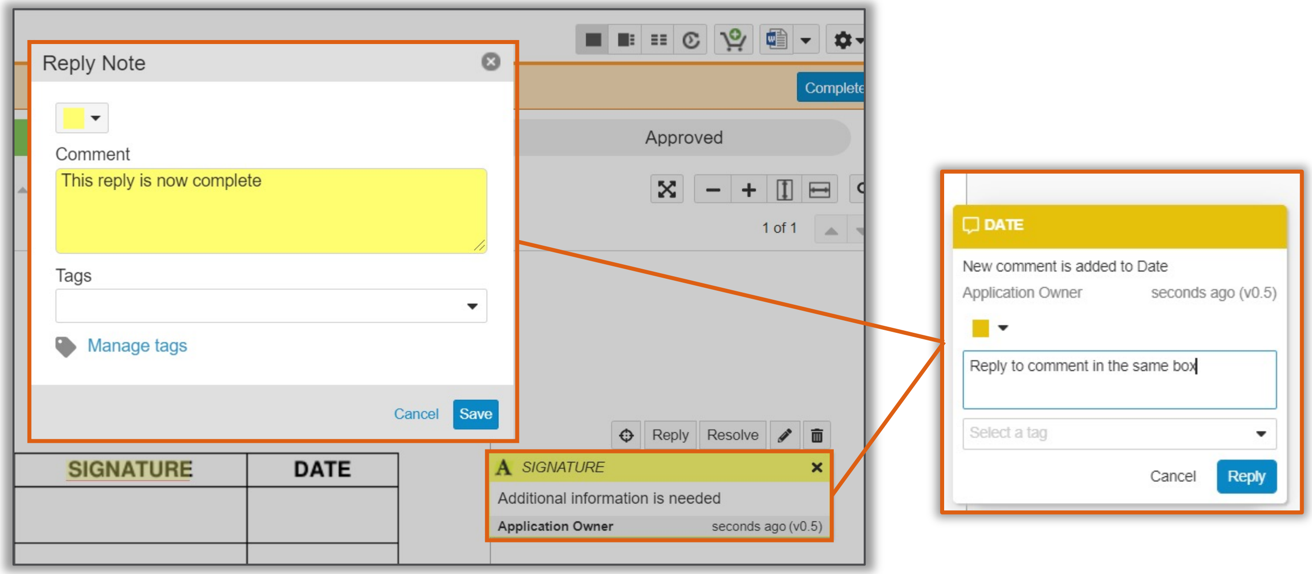
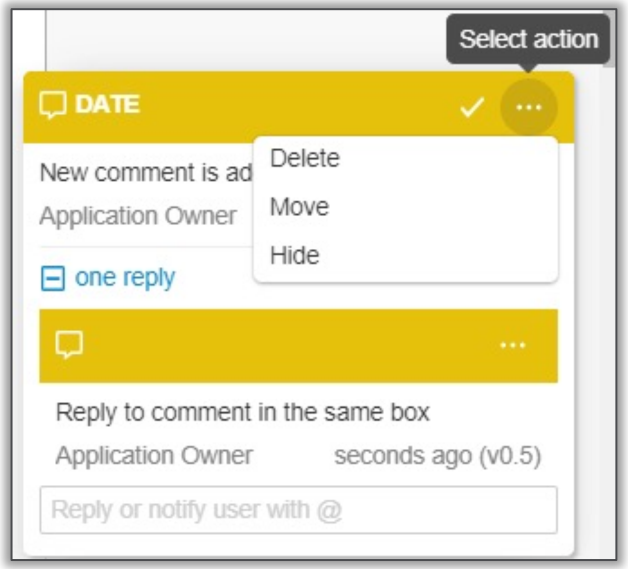
Annotations

- Reply to comments directly instead of creating a separate reply card



- Edit and resolve comments from the new Action menu on each info card



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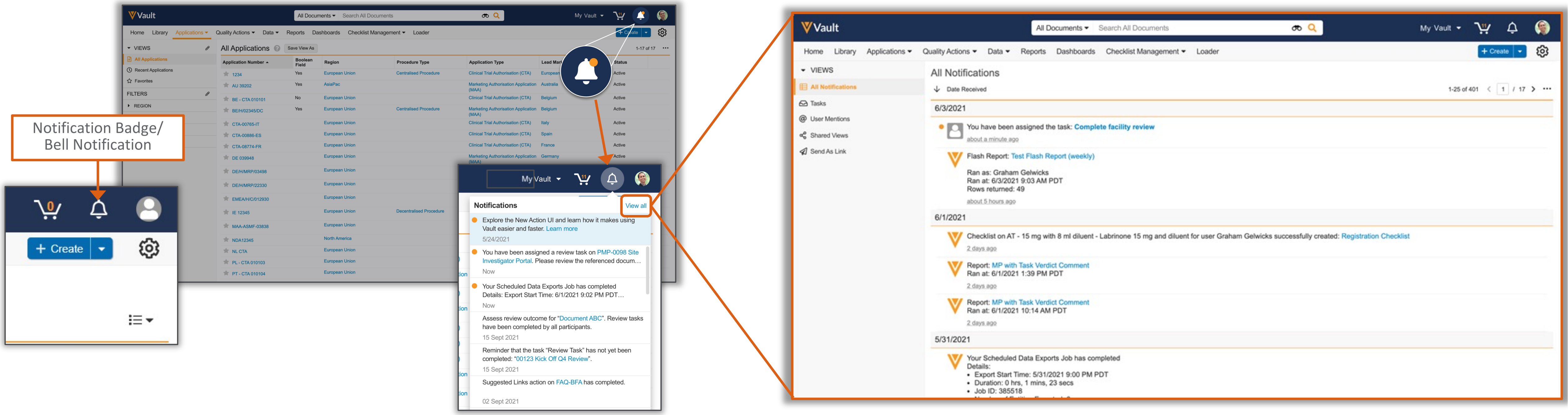
Bell Notification

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



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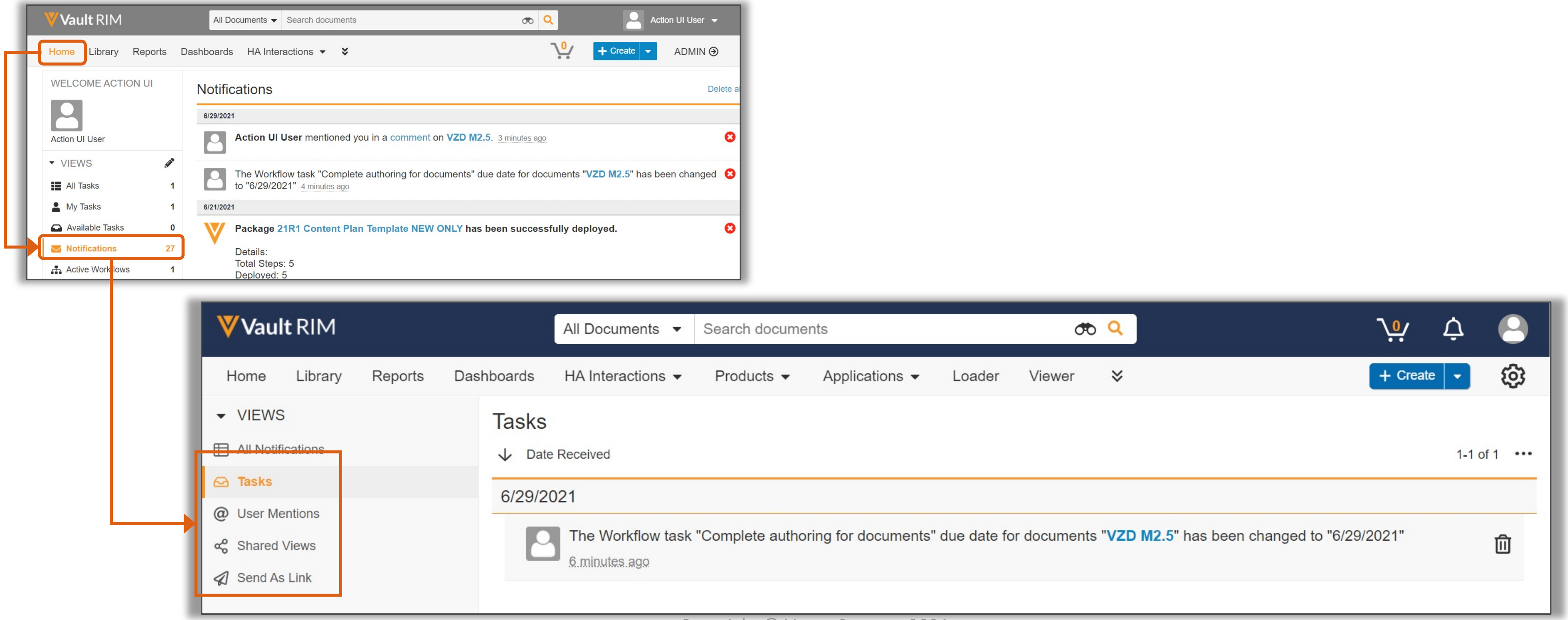
Notifications Page

- 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



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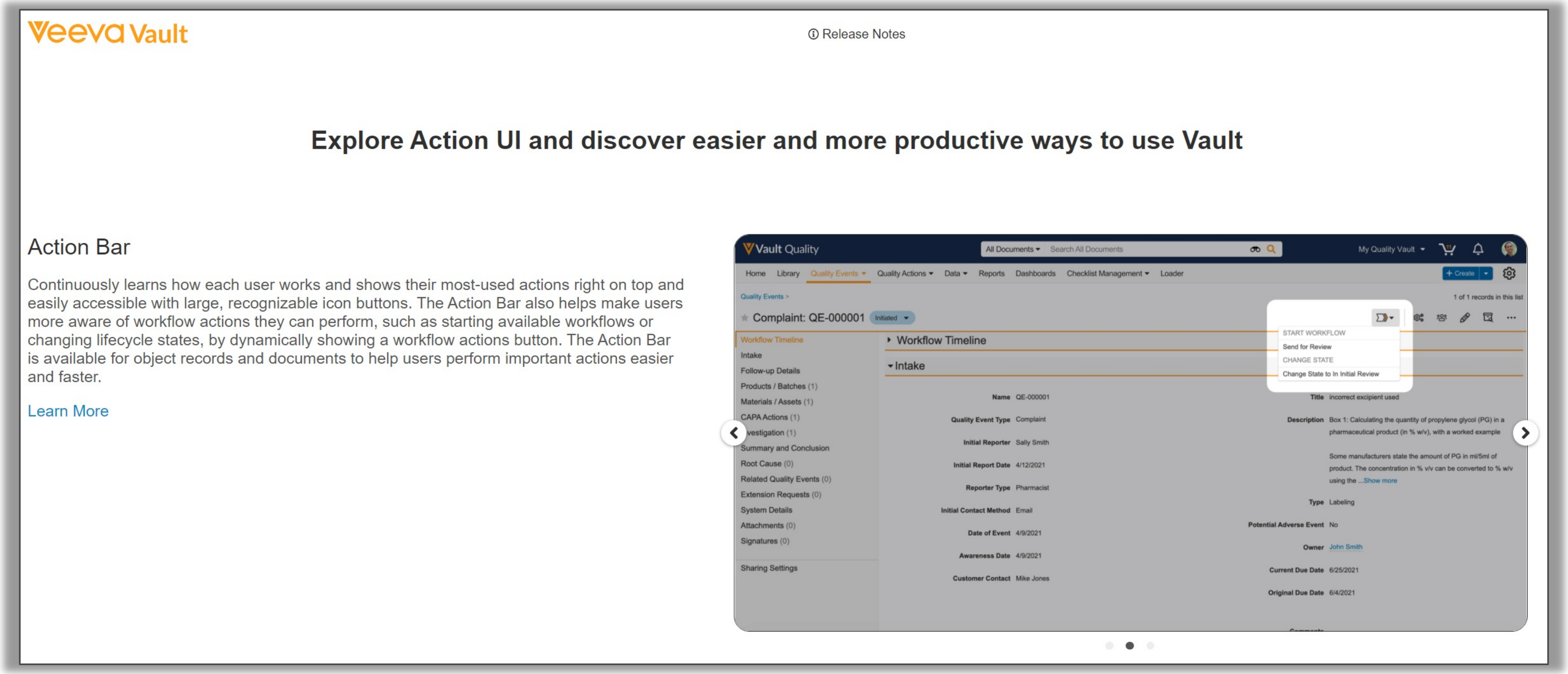
30-Day ‘What’s New’ Notification

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



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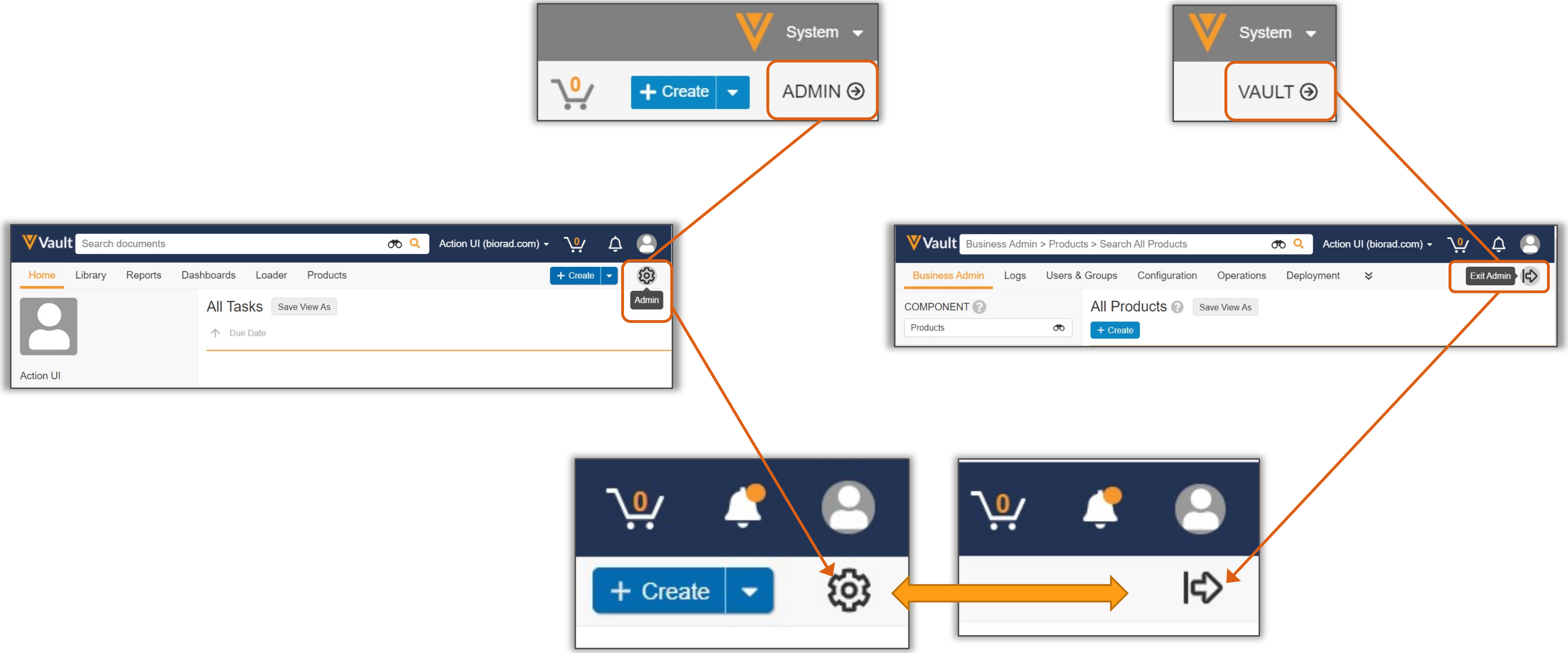
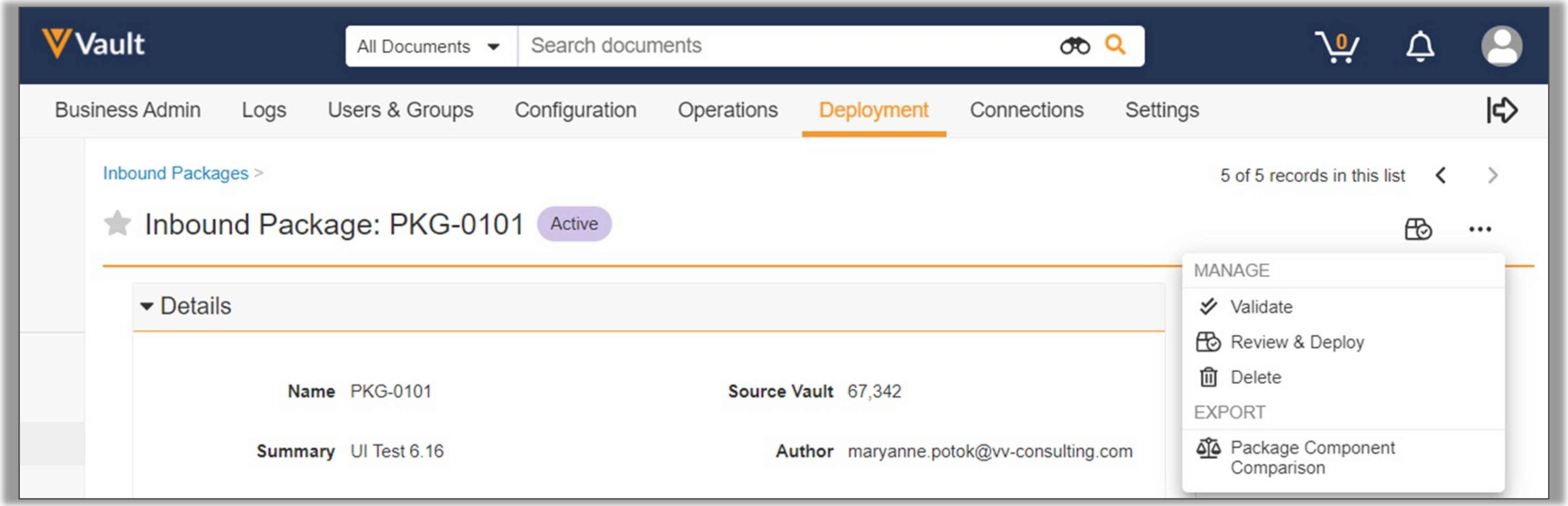
Accessing the Admin Panel

- 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



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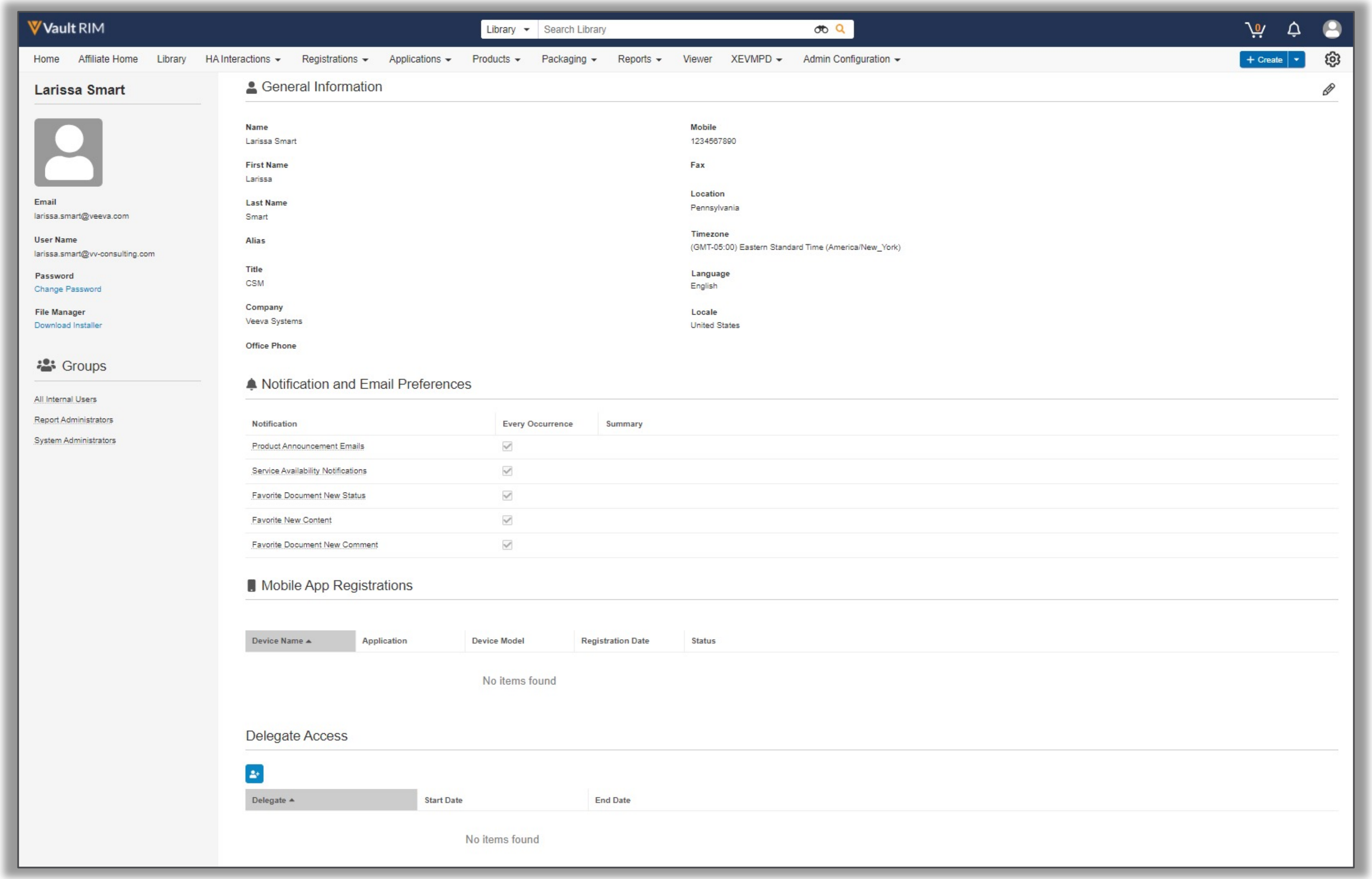
User Profile

- The User Profile has a cleaner, sleeker look



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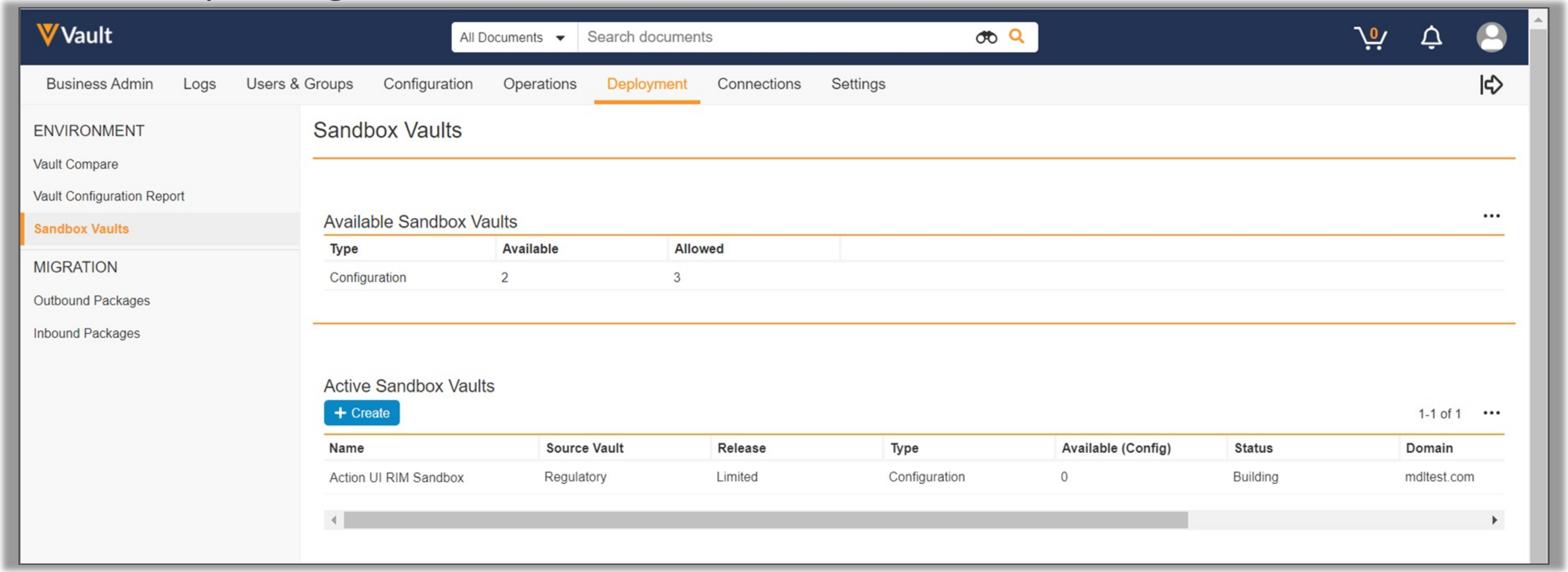
Provision Pre-release Sandbox

- 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



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Key Takeaways from Action UI Updates

- Banner colors, spacing, and styling
- Ellipsis icon replaces gear for Actions menu
- New familiar icons with hover help text throughout
- Dedicated menu for Workflows, and new state change option
- Bell notification icon, enhanced notification page, and ‘What’s New’ page
- Familiar Admin panel access

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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

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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

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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

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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

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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

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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

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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

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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)

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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

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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)

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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

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